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Article:

Bruun, H., Johnson, C., Lassen, J.M. et al. (2025) Publishing public service media on demand: A comparative study of public service media companies' editorial practices on their VoD services in the age of platformization. Journal of Digital Media & Policy. ISSN: 2516-3523

https://doi.org/10.1386/jdmp_00167_1

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Publishing Public Service Media on Demand: a comparative study of Public Service Media companies' editorial practices on their VoD-services in the age of platformisation

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Abstract

This article contributes to the emerging empirical research on the editorial practices of video-on-demand (VoD) publishing in European public service media (PSM). It presents results from a comparative study of the editorial practices visible on the VoDs from 10 PSM companies across 6 countries: UK, Belgium, Poland, Italy, Canada, and Denmark. The aim of the article is to map and compare the editorial practices in the 'prime space' of the VoD services and the 'prime time' of the companies' main linear channels. The analysis is based on data from a sample week 13-19 November 2023. The article contributes to research addressing the key issue of universality in terms of content, and discusses the conceptualisations of the audience that seem to be at work in the transition towards an online PSM identity.

Key words: Public Service Media; VoD services; publishing practices; comparative research

Introduction

The development of in-house video-on-demand services (VoD) is part of the way European public service media (PSM) are adapting to the growing competition with global streaming

services and social media. Currently, the strategic aim of many PSM organisations is to future-proof their companies by transforming PSB into online PSM to attract and retain audiences (Bruun 2023; Donders 2021). In this transformation process, the publishing practices of linear multi-channel television are changing and exposing traditional public service values to renewed scrutiny and discussion (Bruun & Lassen 2023). However, in most European countries, the PSM sector is still considered to be of profound and often growing cultural-political importance. But the question is how the ‘translation’, or innovation, of core public service values are developing in the context of the new editorial practices of publishing PSM in the age of platformisation processes (Poell et al. 2022).

In contributions to PSM research, the dichotomies and dilemmas between the two key obligations of PSM – universality and diversity – across most countries have raised concerns in an emerging on-demand driven media culture (Hutchinson 2023; Helberger 2015). However, there has been limited *empirical* research to date on the practices of VoD publishing in European PSM. This article contributes to an emerging body of research that draws on the tradition in television scheduling studies. It presents the results from a comparative study of the editorial practices and priorities on the VoDs from 10 PSM companies across five European countries: Belgium, Denmark, Italy, Poland and the UK. Canada is further included because of its long tradition of a similar cultural-political focus on PSM. The following companies have been chosen for this case: VRT and RTBF in Belgium; CBC in Canada; DR and TV 2 in Denmark; RAI in Italy; TVP in Poland; and BBC, Channel 4 and ITV in the UK. The aim of this article is to present an initial mapping of the publishing practices from the perspective of what is presented for the users of these VoDs. It works as a first step in identifying the issues for production and policy studies of these practices. This approach therefore comes with limitations. We will not offer detailed contextualisations of

the differences and similarities between the 10 companies. However, the article provides a basis for further analytical case studies or comparative research

The study includes three research questions: First, what are the characteristics of the publishing practices of these PSM companies in the context of overarching platformisation processes and the transition from PSB to online PSM? What do the publishing practices tell us about how the companies interpret their PSM role in terms of the genre profile and domestic content, and the relationship between the scheduling of their politically and economically important channels and publishing practices on the VoDs? Finally, we ask what do these practices tell us about the conceptualizations of the audience that seem to be at work?

To answer these questions, the article focuses on what can be regarded as the ‘prime space’ of the in-house VoD services equivalent to the prime time in linear scheduling (Bideau 2020). This prime space consists of the so-called ‘hero-board’ and on some VoDs also the deck below positioned at the top of the VoD’s landing page (Bruun & Bille 2022). The prime space is what is visible to the user of the VoD-service without scrolling, and it is where the content given top editorial priority is found. We focus specifically on the core PSM obligation of universality in genre and subject area, and requirements to provide domestic content to. Based on these findings we discuss if and how the PSM companies in this case study translate this traditional holistic mission into an online PSM identity.

Editorial curation of VoDs

In recent research regarding the online future of PSB’s transformation to online PSM we find issues of concern which relate to the fundamental PSM obligation to offer a universal service in terms of access and reach including the mainstream audience and specific target groups,

e.g. minorities, children, and young people. The content aspect of universality is the obligation to offer diversity in terms of genres, subject areas, and points of view for all and for specific target audiences in a society. This part of the universality obligation is more difficult to meet because it is connected to the issue of appeal. The tensions between producing a diversity of content appealing to the mainstream as well as content for specific target groups, and the creative problems connected to that task, are well-known from the multi-channel era of PSM. The solution used by the PSM companies was to offer a portfolio of a main channel composed of a mix of genres for a mainstream audience and several niche channels to cater to important target groups.

As pointed out by Bruun and Lassen (2023), there are three issues of concern dominating research in PSM focusing on the universality obligation. First, genre diversity is at stake according to Kelly (2021) and Spilker et al. (2020). The strategy on the PSM VoDs is marked by a tendency to mimic the editorial priorities of streaming services like Netflix. The genre profile is dominated by fiction compared to the linear channels, which have a much more diverse schedule of genres and content targeted at different groups in a society. Second, the limited space of the VoD interface compared to time structured schedules will work against the discoverability of a traditional exposure diversity as argued by Hesmondhalgh and Lotz (2020). Interface placement is therefore an editorial practice that needs to influence and engage the users, and the aim is to meet cultural and political ideals of consumption diversity. Third, researchers have argued that the former focus on exposure diversity in a multi-channel television era needs to be replaced by consumption diversity as the normative goal (Helberger 2015). The assumption is that the AI driven personalization appropriated by PSM companies will develop the so-called echo chambers in which the audience will be trapped in a circle of homogenous content (Mattis et al. 2022). According to Hutchinson (2023), this dystopian

future must be solved by so-called “algorithmic PSM” (p. 149) in which exposure diversity that builds on personalization is used to ‘nudge’ the audience to a more diverse diet.

These concerns about the future of PSM are important and need to be aligned with recent empirical studies of the present developments in the PSM companies and their publishing strategies. Furthermore, the more technological solutions of algorithmic PSM come with multiple ethical challenges regarding the conceptualization of the viewers, including a new form of algorithmic paternalism that needs to be addressed. However, recent years have witnessed the emergence of empirical contributions pointing to the efforts and ability to develop an online PSM identity. The track record of Nordic PSM history and ability to adapt to technological change is supported by recent contributions to scheduling studies and PSM. These studies show how key genres associated with PSM are used as spearheads to differentiate PSM VoDs from transnational and national commercial VoDs. This is pointed out by Lassen (2023) in her analysis of how traditional televisual features of liveness and immediacy are reappropriated on the landing page, and how in this strategy news and current affairs are pushed to the top decks of the VoD services of DR and TV 2 in Denmark. A similar pattern is documented by Bruun and Bille (2022) in their analysis of how the documentary is published on the PSM VoDs’ landing page in Denmark. Both contributions document the strong focus on linguistic and cultural proximity in the published content. Most of the promoted programmes on the VoD’s top decks were in Danish, about Danes and Danish issues, and they took place in Denmark. Furthermore, there was a focus on a mainstream audience as the main target group, and the VoDs were marked by a merger and interplay between the content published on the main channels and the VoD.

Bruun (2021) termed this kind of publishing “trans-programming”. It was described as a strategy to produce and schedule content that was used by the audience across linear and non-linear television. This strategy was able to secure an audience of scale and scope for TV

2. The drivers behind this KPI consisted of a combination between a small Danish market and a business model based on advertisements and subscriptions. Bruun shows how this KPI had an impact on the kind of programmes needed to meet the company strategy of transforming the VoD into a ‘front door’ to the entire portfolio of linear and non-linear services. In line with this transformation to an online PSM company, Bruun and Lassen’s work (2024) shows how the on-air continuity announcements on the linear channels of DR and TV 2 in Denmark push the implied viewers towards the content on the VoDs in profound ways.

The contributions presented above are based on a single-country approach to the transformation of PSM towards an online identity. The market size and the cultural-political regulations in these specific markets are important and might question the general value of the findings to other markets. However, a comparative cross-country approach to the issues is supported by a recent study by Iordache and Raats (2023). The study compares five PSM’s VoD services from small European markets in North-Western Europe. The focus is on the overarching features of the VoDs in these markets and employs Napoli’s strategic responses to technological change by legacy media (1998). The outline shows a complacency but also differentiations in strategies used by the PSM to stand out from the competition, and productions in national languages are hugely important to this strategy. However, the content profiles of the VoDs seem to favour fiction and entertainment to mimic services like Netflix.

Cross-country comparisons like Iordache’s and Raats’ can be regarded as the first step in building a broader understanding by mapping the current transition to PSM in Europe. In combination with the deep dive analysis in the single-country studies, these contributions to scheduling studies are useful as a stepping stone for the comparative analysis of the emerging publishing practices of the 10 PSM companies in this case study.

The comparative study and the focus

The selection of cases is based on a number of factors. First, the cases are sufficiently similar and varied to help identify patterns and differences. Table 1 provides an overview of the six countries and the 10 PSM companies in the study and the market position illustrated by the share of viewing for their main channels. The case study features PSM companies from large and small media markets in North-Western as well as Southern and Eastern Europe and with one or more national languages. We include Canada as presented above. In terms of organisational model nine of the companies are owned by the state, whereas ITV is a privately owned limited company. The funding models are mixes of advertising, licence fees or taxes, and for TV 2 a mix of advertising and subscriptions. The majority of the companies are in this way at minimum partly dependent on commercial revenues and only DR and the BBC do not include advertising. To understand the editorial practices visible on the VoDs, the access to highspeed internet is important to consider. Between 89% and 97% of the population in the six countries, apart from Italy with only 63.1%, has this kind of internet access. However, the 10 companies represent PSM organisations in very different cultural-political contexts and with weak and very strong market positions and levels of legitimacy for PSM, as illustrated by the position of their main channels. Channel 4 is an outlier given its specific remit to innovation, distinctiveness and to engage young audiences. The organisations share a series of characteristics that facilitate comparison, such as the organisational model, the political-economic background, tradition of PSM, and the commitment to digital innovation. Second, the involvement of researchers based in each market context was instrumental to examining para-texts and programmes in the original language. And third, the selection of cases is framed by the participating countries in the EU Horizon 2020 CHANSE-programme:

Country	Size of population in millions	Company	Average share of main linear TV channel in 2023, all day
United Kingdom	67.3	BBC	BBC1: 19.7%
		Channel 4	Channel 4: 5%
		ITV	ITV1: 14.9%
Italy	58.8	Rai	Rai1: 18.4%
Canada	38.7	CBC	CBC: 5,1%
Poland	37.6	TVP	TVP1: 7.7%
Belgium	Flanders: 6.7	VRT	VRT1: 31.6%
	Wallonia: 3.7	RTBF	RTBF La Une: 19.8%
Denmark	5.9	DR	DR1: 22.9%
		TV 2	TV 2: 27.2%

Table 1: the case study countries, PSM companies and market position of the main channel in 2023.

The data for the study of the editorial practices was collected from a sample week 13-19 November 2023. In all countries the week was considered to be a typical week in television programming and it presents a snapshot of the practices at that moment in time¹. The sample was collected before the temporary shutdown and reorganisation of TVP in

¹ The snapshot approach is currently the only way for researchers to secure data for this kind of textual analysis of publishing practices, as there are no systematic data collections done by the PSM organisations or the national libraries in the six countries. Archiving data on VoD interfaces are therefore left to the researchers. This is a huge problem to cultural heritage research now and in the future as pointed out by Andersen and Aegidius (2024).

Poland in December 2023. Rather than providing statistically significant data on the editorial strategies of these PSMs, then, this approach offers an initial map of their provision of genres and domestic content in a way that enables comparison across prime space and prime time and across 10 different organisations. This approach helps us identify patterns that can be tested through further qualitative and quantitative analysis. The potential risk is, however, that this single snapshot approach might select atypical data from the VoDs and the main channels even if the chosen week and the knowledge of the national teams collecting the data mitigated this risk to some degree. We used laptop computers as devices for the collection of the material from new and/or neutral accounts on the 10 VoDs. The free browser extension FireShot was used to collect the screen shots of the entire landing page of the VoDs, and additional screen shots of the entire hero-board was used in the case of dynamic hero-boards that feature between three and 12 programmes in an automatically moving carousel. Furthermore, we collected the published information about the programming in primetime (6pm-11pm) on the main linear channels from each of the PSM companies². The aim was to facilitate comparing the publishing practices on the linear schedules and VoDs and discussing the online profiles produced.

The focus in the following section is the publishing practices found visible to the users in the top of the VoD services, also termed the ‘prime space’ of the VoDs (Bideau 2020; Bruun & Bille 2022). As the research into new practices is emerging, we offer here necessary definitions of a few terms and an introduction to the vocabulary used. First, the hero-board is the top row of the landing page when the user opens the streaming service app on a device or in a browser. This area is known as the editorial high priority space for promoting content; according to interviews with schedulers by Bruun (2020; 2023) and by

² The primetime used in this study is an average that suits most of the countries. In Italy, however, the start of prime time is later (8:30 pm), as is common in the Mediterranean area.

Lassen (2024), the ‘prime space’ is what is visible in-screen without scrolling down or to the right. The kind of value marking guiding the layout grid of content on the landing page is therefore following a top-to-bottom, left-to-right, and big-to-small logic in which top-left-big is equal to high editorial priority, much like a frontpage of a printed medium. Second, each row below the hero-board is termed ‘deck’, and each thumbnail on the deck is termed ‘tile’ by the schedulers, using terminology imported from web design and computer science.

The data analysis for this article was conducted using two main approaches. First, the comparative analysis is based on a mapping of the curation of the hero-boards from each of the VoDs. In the cases of VRT’s VRT MAX, Rai’s RaiPlay, and BBC’s iPlayer, the first deck was included in the ‘prime space’ definition because the hero-board only has one tile, and the first deck is visible to the user on the landing page. The same goes for Channel 4’s VoD 4 which has two tiles on the hero-board. In the article, we focus on analysing the VoD’s genre profiles and their use of domestic production versus international acquisitions. Second, a similar mapping was done of the primetime schedules of the main channels from each of the companies. The aim is to highlight the publication practices on the VoDs compared to the main linear channels of the companies, which is still regarded by all companies as very important to attract and retain big audiences and to meet the public service remit. In this process, we conducted a genre categorisation in two steps based on a pragmatic approach to the concept of genre in scheduling studies (Bruun 2020: 20-28). To tag concrete programmes with a genre label, we first employed the categorisations used by each of the PSM companies themselves if available. A second round was then employed to make the comparison across the 10 companies possible. Based on an inter-coder reliability-test, the team used seven categories to genre label the programmes from the first round:

1	Fiction	Including films, comedy, sitcoms, adventure, crime fiction, drama, sci-fi etc.
2	Culture & lifestyle	Including the fine arts, houses and gardens, health, cooking shows, food, fashion, consumer issues
3	Documentary	Including historic, investigative, and observation documentary, wildlife and nature, true crime, human interest and host driven documentaries, docusoaps
4	News	Including weather forecasts
5	Current affairs	Including breakfast television, political and current affairs talk shows
6	Entertainment	Including reality game shows, quiz and game shows, variety shows, event shows, popular music, entertainment talk shows, satire
7	Sports	Including transmissions of games and events, sports event shows, sport talk shows

Table 2: seven categories to label genre.

To sum up, this article affords priority to the findings from a quantitative comparative analysis of the publishing practices in prime space and primetime. Furthermore, there is little emphasis on the qualitative aspects of the VoDs, e.g. issues around the design and layout of the services. The discoverability and searchability of content, the audiovisual aesthetics of the VoDs, and the mode of addressing the user in the paratexts and artwork will be the topics of future analysis.

Comparing VoD editorial publishing practices

This section of the article focuses on the issue of how the core value of universality could be at stake in what is made visible to the users. We then discuss the issue of distinctiveness of PSM VoDs in the growing competition with international streaming services. Furthermore, the role of the main channels in this context is discussed with a focus on understanding the relationship between the two points of entry to the content in the publishing practices.

The table below presents the 10 VoDs and summarizes the basic structural characteristics when a neutral or fresh account is used:

<i>Country</i>	<i>Service</i>	<i>Prime space</i>	<i>Size of landing page*</i>	<i>Within PSM remit?</i>	<i>VoD type (financing) **</i>	<i>Average quarterly reach in 2023</i>
UK	BBC iPlayer	Hero board: 1 tile Top deck “New and trending: 12 tiles	14 decks	Yes	FVoD	74%
	4	Hero board: 2 tiles Top deck 3 tiles no title	31 decks	No	AVoD and SVoD	41%

	ITVX	Hero board: 5 tiles, carousel	23 decks	No	AVoD and SVoD	45%
Italy	RaiPlay	Hero board: 1 tile Top deck “Don’t miss”: 17-31 tiles	31 decks	Yes	AVoD	22%
Poland	TVP VOD	Hero board: 6 tiles, carousel	30 decks	Yes	FVoD, AVoD, TVoD and SVoD	8.5%
Canada	CBC Gem	Hero board: 10 tiles	28 decks	Yes	FVoD and SVoD	50%
Belgium	VRT MAX	Hero board: 1 tile Top deck “Must see	19-21 decks	Yes	AVoD	45%

		now”: 26-28 tiles				
	RTBF Auvio	Hero board: 5 tiles, carousel	23 decks	Yes	FVoD and AVoD	30%
Denmar k	DRTV	Hero board: 12 tiles, carousel	19 decks	Yes	FVoD	66%
	TV 2 Play	Hero board: 8-10 tiles, carousel	29 decks	No	SVoD	46%

* Counted on the neutral accounts, excluding the hero board.

** AVoD = Advertisement-funded VoD service, FVoD = Free VoD service, SVoD = Subscription-funded VoD service, TVoD = Transaction-funded VoD service.

Table 3: The characteristics of the 10 VoD services 13-19 November 2023.

The structure of the VoDs is in many ways very similar. All use a hero-board of between 1 and 12 tiles where the top priority programme(s) is or are promoted, and these tiles are larger than the other tiles. ITVX, TVP VOD, RTBF Auvio, CBC Gem, DRTV, and TV 2 Play all use a carousel of tiles or trailers that turns automatically after a given number of seconds. The other VoDs had static tiles. Below the hero-board, the VoDs have between 14 and 31 decks.

Apart from low reach of TVP VOD, the VoDs each have solid reach in the population.

However, there is a significant difference between the reach of the top performer, the BBC iPlayer's 74%, and RaiPlay's 19%. The relatively low proliferation of highspeed internet in Italy is the main explanation but also the resilience of traditional broadcast television. Table 3 also presents the basic funding and regulatory status of the 10 VoDs. Most follow the way the PSM company is funded. In 2023, they were all included in the remit apart from Channel 4's, ITV's and TV 2's VoD.

The genre profile of prime space and prime time

The genres promoted in the prime spaces of the 10 VoDs range from a rather homogenic to a more diverse selection of genres:

VoD: genre profile in prime space curation								
	Fiction	Culture & Lifestyle	Documentary	News	Current affairs	Entertainment	Sport	Total number of programmes
BBC iPlayer	37%	-	17%	-	-	40%	6%	35
ITVX	65%	-	26%	-	-	6%	3%	35
4	34%	-	26%	8%	-	26%	6%	35
RaiPlay	35%	23%	-	-	-	23%	21%	48
CBC Gem	59%	4%	13%	-	3%	20%	1%	70

TVP VOD	77.5%	-	10%	-	-	12.5%	-	40
VRT MAX	57%	2%	7%	-	2%	31%	-	42
RTBF Auvio	57%	-	29%	-	-	11%	3%	35
DRTV	13%	6%	36%	8%	11%	25%	1%	84
TV 2 Play	24%	10%	20%	10%	6%	20%	10%	72

Table 4: The genre profiles of prime space on 10 PSM VoDs showing the percentage of programmes in each genre category and total number of programmes in prime space 13-19 November 2023. Percentage is rounded up for the sake of simplicity.

As shown in Table 4, the practices in terms of genre in the curation of prime space ranges from a focus on promoting a few genres at one end, to the promotion of a larger selection of genres at the other end of the spectrum. The promotional practice with a few genres seems to mimic the way Netflix, Amazon Prime Video or HBO MAX use their prime space. BBC iPlayer, ITVX, RaiPlay, CBC Gem, TVP VOD, VRT MAX and RTBF Auvio are VoDs using this practice, and the preferred genre promoted on the hero-board is fiction and secondly entertainment, documentaries, and/or lifestyle programmes. These ‘tentpoles’ (Eastman & Ferguson 2013) in the curation of the VoD’s prime space might be part of a strategy to attract and retain segments of the audience that are still the dominating users of the global streaming services in the market. The publishing practice found in prime space is like the patterns pointed out by Iordache and Raats (2023) in small media markets, and the

practice also seems to apply to middle sized and large media markets. At the other end of the spectrum, we find DRTV and TV 2 Play, both with the longest hero-broads (8-12 tiles). Both are trying to cram a plenitude of different content into the limited prime space of the VoDs. This practice seems to mimic the ideal of single channel content diversity known from the PSB era and directed at a universal citizenry. Furthermore, TV 2 Play and DRTV both afford priority to news and current affairs (both live streaming and on-demand access), and, on top of this priority, DRTV leans towards a very factual heavy prime space because of the many documentaries promoted (36%) (see also Lassen 2023). Between mimicking streaming services like Netflix and the ideal of ‘single channel-diversity,’ we find the profile of Channel 4’s VoD 4 with a more factual genre profile including news. However, the company has a specific remit different to the rest of the PSMs. Although the VoD was not part of this remit during the data collection in 2023, serving specifically younger, ethnic minority or alternative audiences on the service seems to be part of the publishing practice. Our study counted the selection of genres and not the actual programmes, and diversity in genre does not necessarily equal diversity in programming. In the case of 4, the genre ‘documentary’ was largely filled by one single programme in the sample week. However, the different practices are not easily connected to the reach of the VoDs in the population (see Table 2).

If we compare this pattern to the way the main channels from the PSM companies are scheduled, we find another important difference between the companies. Table 4 shows the priorities of genres in primetime during the sample week:

Main channel: genre profile in primetime schedule								
	Fiction	Culture & Lifestyle	Documentary	News	Current affairs	Entertainment	Sport	Total

BBC1	17%	7%	7%	39%	3%	25%	3%	58
ITV1	21%	-	11%	45%	8%	15%	-	47
Channel 4	17%	7%	26%	12%	-	36%	2%	42
Rai 1	14%	5%	-	22%	22%	35%	3%	37
CBC	23%	6%	9%	23%	15%	19%	6%	53
TVP1	28%	1.5%	4,5%	31%	17%	15%	3%	67
VRT	14%	7%	17%	44%	1%	14%	2%	86
RTBF	20%	11%	10%	29%	18%	9%	3%	70
DR1	20%	14%	13%	30%	14%	7%	2%	55
TV 2	2%	5%	7%	64%	7%	7%	7%	72

Table 5: Main channel and genre profile in percentage of the category and total number of programmes in primetime 13-19 November 2023. Percentage is rounded up for the sake of simplicity.

Two characteristics are shared: First, across the PSM companies, we find a far more traditional scheduling practice in which news programmes dominate the schedules, supported by entertainment and fiction in prime time used as ‘hammocks’ (Eastman & Ferguson 2013): e.g. at ITV1, the news broadcasts are supported by a diverse selection of popular programmes, and at Rai1 and TVP1 we see similar scheduling practices.

Second, the relationship between the curation of the VoDs and the scheduling of the main generalist channels speak to two rather different practices among the companies. Most companies exhibit a striking difference between the selection of genres on the VoDs and the main channels. We find a kind of ‘division of labour’ practice between the VoD and the main channel in two ways that is dividing the individual brands. The extreme example is the relationship between TVP VOD and TVP1 which creates two different services because the

‘division of labour’ practice leaves all traditional factual, ‘live’ news and current affairs programming to the linear channel. A similar but less radical version of the ‘division of labour’ practice can be found at BBC, ITV, RTBF, VRT, Rai and CBC. However, a second way to practice the ‘division of labour’ can be found at TV 2, as the main channel is dominated by the news genre (64%) and supported by other factual genres (28%). The VoD’s selection of genres is far more diverse than the main channel. Only at DR do the editorial publishing practices appear to support a diversity of content on both the main channel and the VoD.

Prime space and domestic content publication

Despite these differences in the publishing practices between the 10 companies, we also find a strong common feature. The priority given to publishing domestic productions on the main channels in primetime is striking, and the VoDs follow this practice. However, the curation of the VoDs’ prime space features a difference among the 10 VoDs because of the genre priorities (fiction and entertainment) dominating most of the VoDs. In Table 6 we present the content profile of the VoDs:

VoD	BBC iPlayer	ITV X	4	Rai Play	CBC Gem	TVP VOD	VRT MAX	RTBF Auvio	DRTV	TV 2 Play
Foreign Acquisitions	9%	51%	14%	16%	42%	17%	9%	72%	13%	8%
Domestic	91%	49%	86%	84%	58%	83%	91%	28%	87%	92%

Table 6: The percentage of foreign acquisitions and domestic programmes in the VoDs prime space 13-19 November 2023 based on information from the companies and IMDb.

As Table 6 shows, domestic productions dominate the prime space of eight of the VoDs, and there are only marginal differences between them. There are, however, three special cases. RTBF Auvio's dependence on French language production from other French speaking countries pushes the number of foreign acquisitions. The small media market and production capacity in the French community of Belgium and the cultural proximity between the French community of Belgium and France, which is also shown in high market shares for French channels with Belgian consumers in the French Community is the obvious explanation for this practice, as this also follows patterns of distribution previously identified on the linear channel. The RTBF Auvio offering is significantly international (>70%), with most of the French-language content from France and Switzerland, alongside 11 (>30%) English-language productions (7 UK/ 4 USA). In a similar vein, CBC Gem promotes 42 percent international content of mainly French and British acquisitions, and this priority speaks to the dual languages of Canada and the European impact on its media system despite or because of the USA as the big same-language neighbour. The final case is ITVX, which has 51 percent foreign acquisitions; however, they are all from other English-speaking countries (mostly the USA), and strengthening an entertainment profile of the VoD is probably the driver behind this priority. However, in all three cases the priority given to fiction (including films) leads this more international profile.

Perhaps less surprisingly, an equally high priority given to domestic productions is repeated in the primetime on the main channels as shown in Table 7.

Main Channel	BBC 1	ITV1	Chan-nel 4	Rai 1	CBC	TVP1	VRT1	RTBF La Une	DR1	TV 2
Foreign acquisitions	7%	11%	12%	-	13%	3%	2%	10%	20%	1%
Domestic	93%	89%	88%	100%	87%	97%	98%	90%	80%	99%

Table 7: Foreign acquisitions and domestic programmes in primetime on the 10 main channels in percentage based on information from the companies and IMDb.

RTBF's main channel, CBC and ITV1 follow suit with the rest of the companies in giving priority to domestic productions in contrast to a more international orientation found in the curation of the VoD. However, all PSM companies seem to use their VoDs as part of an overarching differentiation strategy in terms of linguistic proximity and, in most cases, also cultural proximity. The online publishing practices are closely linked to the PSM remits of the companies despite the issue of different target groups in the prime space curation. Across the six countries, regardless of size and language, the obligation to produce content in different genres in the national language(s) and embedded in national cultures is central to the remits. And this obligation is not only linked to small media markets, as documented by Iordache et al. (forthcoming). All the companies meet this obligation, which is probably also an important tool to differentiate their main channels and VoDs in the current competition with global streaming services.

To sum up, the differences and similarities between the editorial practices of the 10 companies are illustrated in Figure 1 and Figure 2. First, we illustrate the *relative position* of the companies by plotting the companies' prime space curation into a model with four poles creating four areas in which the individual VoD's profile is then positioned. Second, we use

the same model to illustrate the relative position of the mainstream channels. The poles in the model are homogeneity versus diversity in content based on the scope of genres and their percentage, and domestic productions versus foreign acquisitions:

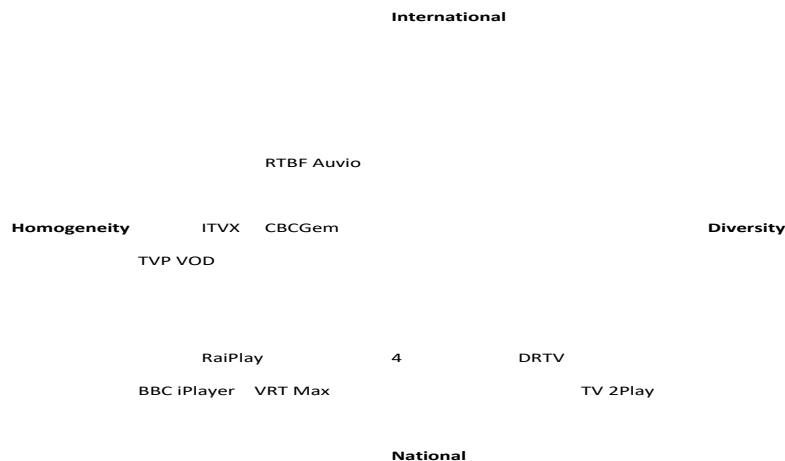


Figure 1: The relative position of the VoDs.

As illustrated in Figure 1, eight out of 10 VoDs are positioned relative to each other in the areas crossing national productions and homogeneity in content. The publication practices are dominated by an emphasis on fiction (TVseries and films) and entertainment. Only DRTV and TV 2 Play place more emphasis on traditional televisual qualities like news, live-ness and factual genres in prime space. The national-international axis is where we find the second major difference between the VoDs. Seven of the 10 VoD place emphasis on domestic

programming. However, at RTBF Auvio, ITVX, and CBC Gem the international acquisitions play a bigger role in the profile as detailed above. However, the proximity in terms of language is still given priority in all three cases.

These publishing practices are in many ways different to the scheduling of the primetime on the mainstream channels, as illustrated by this second model in which we position the main channels in relation to each other.

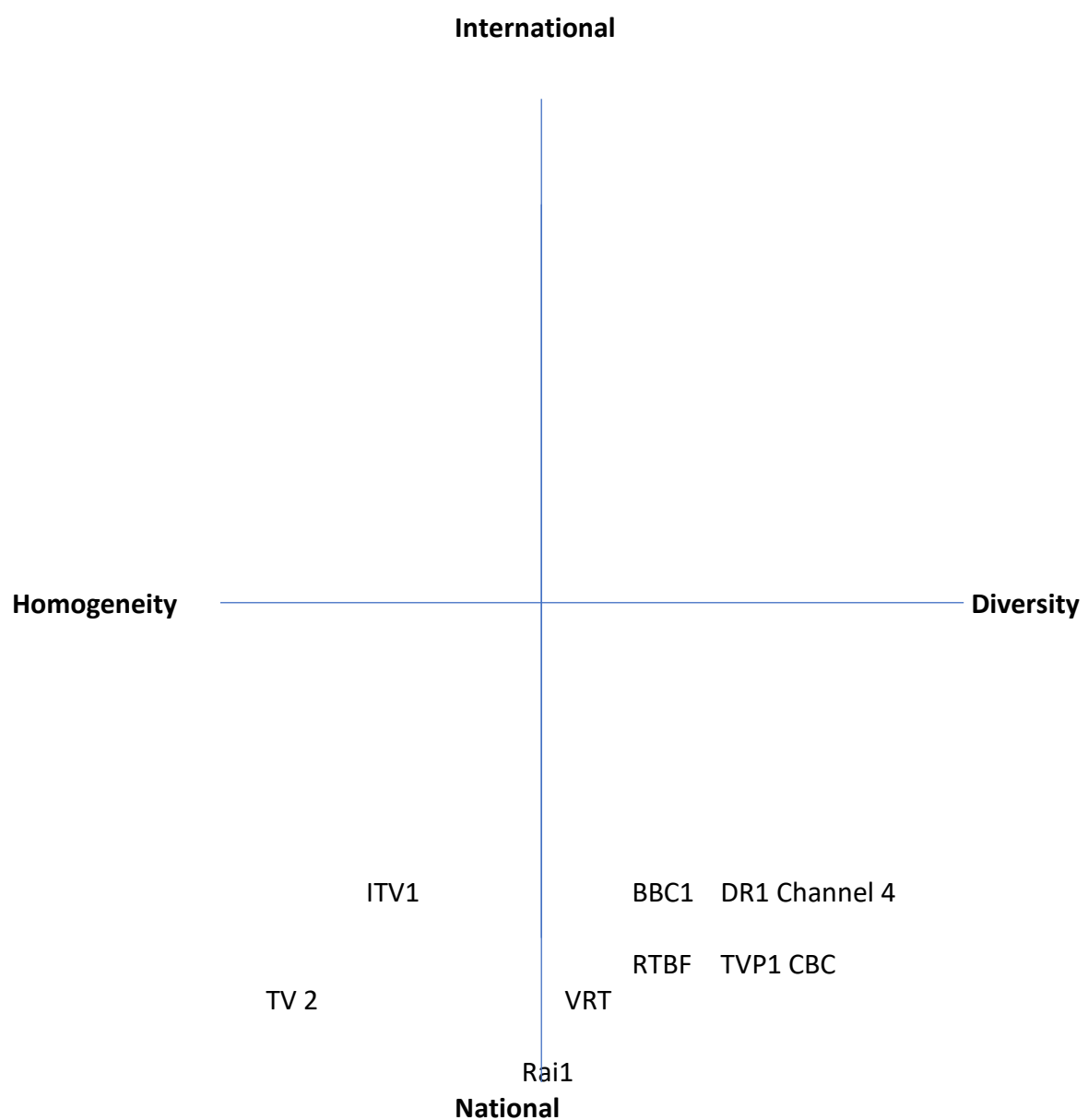


Figure 2: The main channels positioned relative to each other.

Where there is genre homogeneity in the linear channels, this tends to stem from a greater emphasis on news, as with TV 2. TV 2 also offers a separate news app and a 24/7 linear news channel. However, genre diversity is a common feature across the main channels, and the priority given to cultural and linguistic proximity is even stronger. In comparison, the VoDs demonstrate greater genre homogeneity than the linear channels, and it is driven by non-news genres, particularly fiction and entertainment.

Even if the comparison between the VoD curation and the scheduling of the main channels illustrates patterns in the use of the VoDs, there is a major feature that is not made visible. The VoDs do not carry mostly new programmes every day in prime space like the primetime of a linear channel schedule (except for reruns). Instead, they reshuffle content across the prime space. To illustrate this level of reshuffling of content, out of 84 programmes promoted by DRTV during the sample week, 66% were repeats of the same programme just moved to another tile on the hero-board. The rest consisted of either new episodes of a series or serial, or completely new content. 4 and ITVX showed 14 unique programmes across their 35 tiles, i.e. 60% repeats; iPlayer showed 22 unique programmes across its 35 tiles, i.e. 37% repeats. The scale of repetition of programme promotions is high across the 10 VoDs; consequently, the editorial publishing of prime space is probably marked by a dilemma. On the one hand, the aim is to show the implied audience the *new* programmes available; on the other hand, the VoD is also an archive, and it aims to exhibit the content for viewers that do not visit the VoD every day. In general, online PSM faces a big and overarching promotional challenge *if* the VoD is supposed to work as the ‘front door’ to the *entire* PSM portfolio, rather than a new online platform added to the portfolio (Bruun 2023).

As this comparative mapping of similarities and differences in the publishing practices shows, the transition to online PSM is a process complex to compare, and we only scratch the surface of the cultural-political contexts in which it is embedded. Nevertheless, this initial comparative mapping contributes to the body of research on the strategic aim behind the VoD services as well as PSM companies' role and position in the competition for audience reach in the individual media markets (e.g., Donders 2019; Bruun 2023; Lassen 2024). Furthermore, the mapping contributes to the emerging research on the content profiles of PSM VoDs published for different national audiences (e.g. Bruun and Bille 2022; Iordache and Raats 2023; Lassen 2023).

PSM VoD and the audience

Based on the results from the analysis of the prime space curation of the VoDs against the scheduling of the main channels' primetime, this part of the article discusses what these practices reveal about the kind of audiences PSM are imagining. As mentioned above, the VoDs' prime space can be positioned on a spectrum of publishing practices. This spectrum ranges from mimicking the genre mix of global streaming services like Netflix and leaving the more traditional factual content like news and current affairs to the broadcast channels in one end, to mimicking a kind of 'single channel' diversity where the prime space features a broad scope of genres in the other end. Furthermore, the channel or service tags on programmes selected for the VoDs inform us about the kind of target audience that the publishing practices are aimed at. Table 8 shows the percentage of programmes on the VoDs prime space which are also broadcast on the main channel at some point; in this way, it shows the level of content connection between the prime space of the VoDs and the main

channels. The rest of the content comes from niche channels and online services, including content that is published on the VoDs exclusively:

VoD	BBC iPlayer	ITVX	4	RaiP lay	CBC Gem	TVP VOD	VRT MAX	RTBF Auvio	DRTV	TV 2 Play
Main channel	26%	57%	66%	22%	64%	28%	76%	26%	68%	55%
Other Output incl. the VoD	74%	43%	34%	78%	36%	72%	24%	74%	32%	45%

Table 8: Percentage of programmes in prime space also published on the main channel.

At VRT MAX, DRTV and TV 2 Play, CBC Gem and ITVX the target audience deduction is that the prime space of the VoDs have a high level of connection to the main channel with its focus on a large national audience (over 40%). For example, at DRTV, the prime space mostly promotes the programmes produced for primetime on the main channel rather than the online youth portal P3 and the linear channel DR2, or the children's channel Ramasjang. In this way, the trans-programming of content is supported, which is also the case at TV 2 (Bruun 2021). Compared to the strongly segmented audience known from the multi-channel-portfolio era of television, the conceptualization of the audience in the prime space curation seems to be a much more homogenous national audience. On VRT MAX, ITVX and CBC Gem, the notion of the audience also seems to be a kind of mass audience targeted by the universal appeal of mainstream films, tv-series and popular entertainment to compete with the global streaming service. On these six VoDs, the limited promotional space of the VoDs

is a challenge to PSM's obligation to also cater to niche audiences that no longer use traditional broadcast channels.

The practices found at BBC iPlayer, RTBF Auvio, RaiPlay and TVP VOD suggest a rather different notion of the audience with more differentiation from the main channel, which suggests an attempt to appeal to a younger audience and shaped by genre expectations from international SVODs. BBC iPlayer promotes content from the youth channel BBC Three, and RTBF Auvio promotes content from RTBF's youth channel Tipik, and the target audience seems to be a young audience. RTBF Auvio also have a very high level of content published on the VoD exclusively. Furthermore, BBC iPlayer is dominated by national content for this young audience. At TVP VOD, the very tense political situation in Poland and the main channel's focus on news and current affairs are countered by a very different conceptualisation of the audience on VoD. The content is an aggregation of films and series harvested from the 21 niche channels and services in TVP's portfolio, some of which have younger audiences as their target groups. However, it is still a notion of an audience that is looking for cultural and linguistic proximity in the content not found on the global streaming service. The limited promotional space of the VoDs is, however, a challenge to PSM's obligation to also cater to a broader audience that no longer use traditional broadcast channels. Finally, Channel 4's VoD has a high level of connection to the linear channel, but its target audience is already a young niche audience as mentioned above. Appeal to this target audience is supported on the VoD by the promotion of content from Channel 4's youth channel E4 in the prime space.

Conclusion: online PSM in the making?

As this comparative mapping of similarities and differences in the publishing practices of the prime space of the VoD interfaces suggests, the transition to online PSM is a process complex to compare, and we only scratch the surface of the cultural-political contexts in which it is embedded. Nevertheless, this mapping contributes to the body of research on the strategic aims behind the VoD services as well as the PSM companies' role and position in the competition for audiences and reach in the individual media markets in Europe and beyond. Furthermore, the comparative mapping contributes to emerging research on the content profiles of PSM VoDs published for different national audiences presented above. Across the 10 VoDs in our study, the editorial publishing practices in prime space speak to how this new online identity is presently being built. Most of the companies in our study try to position themselves in this new competitive situation by mimicking streaming services like Netflix in terms of genre profile. For many of the VoDs, the target audience is broad and it includes younger segments that they try to attract. Only in the publishing practices of DRTV and TV 2 Play does a traditional universal audience seem to be the target group for the VoDs' mix of genres. However, the linguistic proximity applied, can be said to produce a distinct content profile for the PSM VoDs compared to popular global streaming services in the different media markets. All in all, regardless of size of the market or whether the national language is spoken in other countries in Europe or in the world, the national focus seems to be the survival strategy easiest to employ.

To sum up, the publishing practices in prime space found in this study seem hugely influenced by the competition with the global streaming services, and the contours of an online PSM identity are visible in the editorial publishing patterns. The publishing practices found, nevertheless, put the core value of universality in terms of content at stake and up for discussion as the research literature suggests. The genre diversity, exposure diversity and probably also consumption diversity are at stake given the limited promotional space – or real

estate – of prime space compared to the primetimes in a portfolio of linear channels. This limited real estate of prime space will become an even bigger communicative challenge to online PSM if the interfaces of VoDs are to become the stand-alone entry points – or ‘front doors’ – to the entire portfolios of linear and non-linear content in the future. The mitigation of these issues might need AI driven personalisation with the purpose to help consumption diversity, and the second step in the study of how the online PSM identity is built will include the different levels of personalization of the VoDs’ content profiles. Personalisation is currently implemented by many of the companies alongside the editorial publishing practices presented above.

Funding statement

The research received funding from *Public Service Media in the Age of Platforms*, CHANSE-grant no. 0257-0009B.

Acknowledgements

Country specific data collection and analysis supported by Catalina Iordache, Dan Martin, and by Serra Tinic, Massimo Scaglioni, and Michal Glowaki.

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