QUALITY, DIVERSITY AND INNOVATION: THEIR ROLE IN THE ECONOMIC FUNCTIONING OF THE MEDIA INDUSTRIES

Researching Diversity of Content in a Multi-platform Context

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Our research on 'Multi-platform media and the digital challenge: Strategy, Distribution and Policy' is broadly concerned with how growth in digital and multi-platform delivery has affected media content and the economics of supplying media. Focusing on the UK media industry, one of the questions the project will address is to what extent the migration of media companies towards multi-platform production and distribution is widening or narrowing diversity and plurality of content? We hope to draw on techniques used in earlier studies of diversity (Picard, 2000; De Bens, 2007) although, since few earlier studies have embraced multi-platform analysis of diversity, this aspect of the project creates opportunities for methodological innovation. This paper presents our initial conceptions about the methodological issues and challenges involved in analysing and measuring diversity of media content in a comparative cross-sectoral context.

Introduction

In recent years, many media organisations have responded to convergence and to growth of the internet by migrating towards a multi-platform approach to production and distribution of content. Convergence, it is often claimed, will result in countless gains for citizens and consumers related to the arrival of innovative services, greater flexibility and user-control over how and when to access media plus greater opportunities for participation. While adoption of a multi-platform approach is widespread amongst media firms, what this actually means in terms of the sort of content being supplied, the combination of delivery platforms being used, the sorts of opportunities being pursued and the level of investment and experimentation involved varies widely (Anderson, 2006; Caldwell, 2003; Johnson, 2007; Roscoe, 2004;

Bennett and Strange, 2011).

This paper is borne out of initial research being undertaken as part of a larger three year ESRC funded project 'Multi-platform media and the digital challenge' being embarked upon within the Centre for Cultural Policy Research (CCPR) at the University of Glasgow. The project seeks to investigate how multi-platform strategies are impacting on the organisation of work and on content selection and production decisions and, through this, aims to elucidate not only how opportunities to exploit content are changing but also how media diversity is being affected. Further to this, in order to improve understanding of the extent to which digital convergence is providing opportunities for improved efficiency that are shared right across the media industry, this project will adopt a comparative multi-sector approach addressing the transforming organisation of work both in television and print. At a time of concern about how incumbent media organizations can adjust successfully to advancing technology and of debate about how communications policies ought to change for a converged environment, this project and its outputs are intended to deepen and enhance public understanding of multi-platform strategies in the context of a rapidly evolving media ecology.

As already mentioned, a central concern in this project is to investigate empirically how the adoption of a multi-platform outlook is affecting the diversity of content. The project aims to incorporate a comparative analysis of media output. Focusing on distribution schedules and on editorial decisions about the nature and spread of content for selected media products and service propositions, the project intends to investigate and compare how the composition of media output has changed over time (in the 2007-2013 period) alongside adjustment of strategies more towards multi-platform delivery. There are, however, a number of challenges related to this aspect of the project and a paucity of past empirical studies conducted to determine diversity across platform and sector. These will be outlined at the close of the paper to invite feedback after discussion of the rationale for research on this topic and existing approaches to studying media diversity.

Multi-platform innovation: increasing content diversity?

Expansion in distribution capacity, improved search functions and the introduction of a digital return path have created unprecedented opportunities for exploitation of the value within any given universe of media content. It has been suggested that the sheer space available online and via new platforms has led to an exponential increase in the accessibility of content (der Wurff, 2008), speed of access and the ability to present formats in an innovative manner (Fenton, 2010). Additional opportunities for innovation and

improved efficiency stem from the ways digital technology is reshaping relationships between media suppliers and audiences (Brook, 2009; Rusbridger, 2010).   New technology is allowing suppliers unprecedented opportunities to get to know their audiences and to match up content more closely to their needs and desires.   Because of improved signalling of audience preferences, the ability of content suppliers to trace and cater more effectively to shifting and specific tastes and interests amongst audiences has vastly increased.   In addition, because of the 'lean forward' rather than 'lean back' character of digital media consumption, a much more engaged and intensive relationship with audiences can be constructed and, again, this is a source of both creative and commercial opportunities (Lotz, 2007; Ytreberg, 2009). From the point of view of citizens and consumers, the advent of greater user-choice, control and flexibility in relation to content consumption opportunities also appears to offer numerous benefits. But are these advances really offering audiences an enriched, improved or more varied diet of media provision?

Shared digital technology has made re-cycling of content easier than before (Doyle, 2002a) and multi-platform re-purposing is therefore common practice (Vukanovic, 2009). Techniques of 'windowing' (Owen and Wildman, 1992) to fully exploit IP long pre-date digitisation but, in principle, are now more relevant than ever for media suppliers, albeit that modelling the range of distributive outlets and the factors likely to dictate their sequencing is more complex. But migration towards a multi-platform outlook is not solely motivated by the desire to exploit content more effectively. The re-envisaging of corporate missions in a more platform-neutral way also reflects a widespread recognition that major changes in consumption patterns and in the appetites of (especially younger) audiences have taken place. At the same time as offering opportunities to innovate, these changes threaten to leave behind media organisations which fail to adapt.

Digital convergence and growth of the internet may have provided extensive opportunities for innovation in the media sector, but also, as evidenced by recent closures and takeovers amongst newspapers, these developments have engendered difficulty and even demise for some market incumbents. In television and especially print publishing, many businesses are struggling for survival against newer online rivals (Luft, 2009; Patterson, 2007; Slattery, 2009). The siphoning off of audiences by online service providers such as Google and YouTube who frequently do not own and have not borne the costs involved in producing content represents a serious threat to the current and future revenue-generating ability of media organisations worldwide.   The construction of attractive multi-platform content propositions can be expensive and some forms of media content are inherently much better suited towards diversified distribution than others.   Therefore the widespread impetus to adopt a multi-platform approach is

inevitably contributing to the ascendance of some forms of content at the expense of others (Hesmondhalgh, 2002: 76; Johnson, 2007; Murray, 2005: 431).

It has further been contended that digitisation has had limited impact on the types of content and of formats presented to audiences (Kung et al, 2008). The suggestion that the Internet is lowering barriers to entry appears at odds with existing evidence which suggests it is, in fact, the cost of distribution which is lowered, rather than the cost of production. Despite the internet offering a more diverse range of sources and content compared to that of traditional models of distribution, in some cases audience attention can become even more concentrated (Hindman, 2007). A proposition we intend to test is whether, in TV world, broadcasters may be focusing on 'safe bankers' and looking for content with impact, longevity and prospects for internationalisation This can be exemplified by a dominance of a few entertainment formats as described by Peter Fincham, ITV Director of Programmes, "It is very difficult to grow other brands of a similar scale because the big shows use up so much of the schedule and budget" (2012: 5). With regard to the influence of the Internet on the heterogeneity of news content, in one sense the proliferation of news outlets associated with digital media developments has enhanced the diversity of news services available (Freedman and Scholsberg, 2011). Digital television viewers have access to 24 hour news channels, but in terms of content production, research has identified increasing homogenisation with a growth in 'second-hand stories' as well as straight publication of news wire and press releases (Freedman and Scholsberg, 2011: 19). Studies have found that the content of mainstream news is largely the same, across different outlets, often using identical quotes, images and similar text (Fenton, 2010). It is suggested that news consumed online faces a similar paradox with the ability to represent more niche and alternative voices, but at the same time allowing those consuming it to tailor their preferences which may result in a less diverse 'diet of news' (Freedman and Scholsberg, 2011: 19).

The ability of incumbent media to adjust successfully to change and to provide innovative content and services that meet audience needs and desires is dependent on an informed understanding of the creative and commercial opportunities created by these developments. A broad objective for this research, then, is to examine the main strategic motives encouraging media suppliers to embark on multi-platform strategies and to find out to what extent digitization, convergence and multi-platform approaches are enabling them to make better use of their resources.

Plurality and diversity: on the policy agenda

Concerns about press standards and about the potentially harmful effects of concentrations of media ownership have featured regularly throughout the history of UK media policy (Curran and Seaton, 2010). Concentrations in ownership, it is feared, can lead to over-representation of certain political opinions and imbalances in forms of cultural output (Doyle, 2002b). Such concerns have given rise to a statutory regime which, through imposing modest restraints or public interest tests that apply in relation to certain forms of expansion of media ownership interests, is intended promote plurality but, as evidenced, say, by the scale of UK newspaper ownership enjoyed by News Corporation, this regime has not managed to prevent media empire-building. However, notwithstanding the failures of the past, media plurality is now firmly back on the policy agenda in the UK. In the wake of high profile scandals including phone hacking at the *News of the World*, during which it was revealed that the phones of a murdered schoolgirl, relatives of deceased British soldiers, and victims of the 7/7 London bombings were accessed illegally, an independent inquiry led by Chief Justice Lord Leveson was established in 2011.

As well as reviewing specific allegations of hacking at the *News of the World*, the Leveson inquiry has sought to scrutinise the culture, practise and ethics of the British press and resurgent concerns about excessive concentrations of media ownership and their effect on pluralism and democracy. British journalism has been at a cross-roads and potentially regulation could lead to serious reform of the sector. Plurality and diversity principles can be seen to be at the centre of that reform (Freedman and Scholsberg, 2011: 8). Ofcom, the independent regulator and competition authority for the UK communications industries, was created in 2003 to improve coordination in the regulatory frameworks and particularly as a response to converging media markets (Freedman and Scholsberg, 2011: 8). Recent advice from Ofcom affirmed the widely held view that plurality makes a vital contribution to a well-functioning democratic society by informing citizens and preventing too much influence on the part of any single media owner (2012: 8). Ofcom (2012) defines plurality with reference to the desired outcomes of a plural market as ensuring a diversity of viewpoints is available and consumed across media enterprises; and preventing any one media owner or voice having too much influence. Many European countries subsidise providers of content across the newspaper and broadcasting sectors in order to extend the supply available to the public (Doyle, 2002b). It is difficult, however, to establish a cause and effect relationship between concentration and pluralism as there are many other variables at play beyond the diversity of ownership (Doyle, 2002b). As well as being contingent on diverse ownership media pluralism relates to a diversity of media 'voices' and also on diversity of media content.

In 2009, a Council of Europe report reviewed the methodology for monitoring media concentration and media content diversity (CoE, 2009). The report compared the approaches taken across European member states and confirmed that there is a great deal of divergence in terms of visions of media diversity and

pluralism with some countries possessing advanced monitoring systems and others with limited or no measures in place. The most advanced systems of monitoring take into account a multiplicity of aspects of pluralism and diversity including: fulfilment of human rights, freedom of speech, reflection of sub-cultural and minority voices, quality of content and the presence of local and regional content. The Report suggests that one possible approach towards reviewing diversity is to use the principle of variance as a proxy indicator for example 'variance of content, of journalistic genres, of a number of media outlets, etc' (ibid: 11).

Dissecting Diversity

Van Cuilenburg describes media diversity as the 'heterogeneity of media content in terms of one or more specified characteristics' (2000: 52). In order to focus on the key attributes of diversity of relevance to this study, it is useful to further break down the concept into discreet categories, whilst recognising there tends to be causal relationships between them. Within communications policy, diversity can be looked at in terms of both source diversity and of content diversity. Source diversity refers to existence in the media landscape of a numerous and diverse range of providers (Napoli, 2007). Taking this focus media ownership and concentration become important indicators of diversity. This approach of looking at media diversity has been critiqued on the basis of difficulties in determining causal attribution between source diversity and a diversity of content. This further relates back to the issues raised in the second section regarding the findings of recent research into new media contexts. Despite a dramatic increase in the range of available sources and content via online modes, audience attention can become even more highly concentrated around a selective range of sources. As asserted by Hindman (2009: 89) 'the internet does not change the economic logic of concentration. If anything, the Internet's ultralow distribution costs would seem to guarantee even large economies of scale'.

Content diversity has a number of facets including diversity of programme types or genres available and potentially also the diversity of viewpoints expressed and demographic diversity of those depicted in the content. A further aspect is 'exposure diversity' (Napoli, 2007; Helberger, 2011) – a concept based on the extent to which audiences consume a wide range of content. This constitutes a more user-centric conception of media diversity which can be seen as more relevant in a digital age. Rather than a focus on the problems of scarcity of content, audiences can be seen as suffering from an overload of content and correspondingly issues around navigating and more importantly trusting the content they find (Helberger, 2011).

Content diversity is central to our investigation, but the concept can be understood in a variety of ways and therefore further critical interrogation is required in order help pinpoint how it can be operationalised within the research and, as a corollary, the methodological choices which it implies.

Operationalising a definition of media content diversity

Van Cuilenburg describes a definition of diversity which moves beyond source, in terms of media market structure and media organisational conduct, to content as a 'product definition' therefore not conflating the number of media outlets with the performance (1999). Content diversity can be further collapsed into several key features: demographic; idea/viewpoint; and programme-type diversity (Napoli, 1999). Demographic diversity explores the representation and portrayal of minority groups within content. This might be along gender, racial, ethnic or religious lines and considerable research has been undertaken which has shown how particular demographic groups have been under represented in media content, for example in television programmes, compared to actual demographic data derived from census work. Idea diversity is more complex and arguable more elusive as it aims to review the diversity of social, political and cultural perspectives being presented in media content. Studies of this feature have tended to focus on variables such as amount of local programming or editorial positions seen as influencing idea diversity (Napoli, 2009).

Of these aspects of content diversity, programme-type, which focuses on the range of different shows available, mostly closely represents the research aims. One example of a model used to explore progamme content diversity is supplied by Farchy and Ranaivosen (2011) and was employed within a recent UNESCO report which detailed two case studies of applying the Stirling model (2007) of diversity in culture (2011). In their case, they apply the model for measuring content diversity in their comparative study of French, British and Turkish television channels. This model has three components namely:

- Variety, the number of categories
- Balance, the way these are spread (i.e. the time allotted to each category)
- Disparity, the degree of difference between categories.

If all other factors are held equal, diversity increases when these components increase. Disparity, they note, is the most complex and novel element of the model and, in order to systematically measure this feature they develop a set of seven attributes to be taken into account: age, exclusivity, information, heritage, cost, risk, story. The next section will explore the history of content analysis and look at how this approach has previously been used to study media content diversity.

Using content analysis to study media diversity

By focusing on a selection of case studies, our study intends to examine how the overall composition of media output is changing. In so doing it aims to find out to what extent multi-platform publishing and distribution is contributing to a widening of content diversity and choice and, conversely, in what ways multi-platform may be encouraging standardization and uniformity around safe and popular themes and brands. Content analysis is one of the most commonly used tools employed to examine diversity issues and will be explored in this section.

Historically there has been a rejection of quantification within cultural studies. This is the result of a number of factors including resurgence in anti-positivism during the 1960s and the background in literary studies rather than social sciences amongst founder members of the movement. Further to this, frequency of occurrence was not seen as definitive measure of significance and uniqueness privileged over generalisability and representativeness (Deacon, 2009; Krippendorff, 2004). In recent years, however, the disadvantages of ignoring the merits offered by a quantitative approach and methodological tools have resulted in a shift towards combining both qualitative and quantitative research in this area. As in this study, content analysis brings methodological rigour and systematicity (Hansen et al, 1998), but is also enriched by triangulation with qualitative methods, namely observation and in-depth interviews. Deacon (2009) outlines some of the restrictive implications of not utilising quantification. A reluctance to engage in systematic counting, he suggests, can lead to vagueness and illogical statements being made which he refers to as 'quasi-quantification'. Further issues include the restriction of the deconstruction of statistical evidence, a disengagement of cultural studies from public policy debates and problems in adequately addressing questions of power.

The purpose of content analysis 'is to quantify salient and manifest features of a large number of texts and the statistics are used to make broader inferences about the processes and politics of representation' Deacon et al, 2007: 119). There are a number of key parameters to put in place when undertaking analysis of this kind including those related to sampling, the attributes or units to be counted as well as coding frames and tools to ensure consistency and inter coder reliability. In terms of sampling, it is important to define the total range of the content being analysed, as well as deciding on the sampling unit of interest (Deacon, 2009). Media content diversity can be studied at macro, meso and micro levels (Roessler, 2000). Van Cuilenburg (2000) identifies four different levels:

- Individual *content units* of information such as TV progamme or newspaper article. The focus of analysis would be preferences or opinions represented within these units;
- *Content bundles* such as a newspaper title or broadcasting channel. This would then lead to the assessing the programme or editorial content as a total package offered by individual media outlets;
- *Medium type* (Radio, TV). This would then lead the focus to be on the diversity of supply on the newspaper market or television market;
- The level of society's communications *system* as a whole (broadcasting, newspapers, internet).

As this section reflects, there are a considerable number of methodological decisions to be made when bounding the parameters of the study. The next section attempts to unpack some of key issues faced by the present study. These will be interrogated with reference to the aspirations of the study and the experience of past empirical studies of related areas.

The methodological challenges of the present study

In order to inform the methodological decisions for this study, the approaches undertaken in existing research will be examined. As already discussed, increasing source diversity does not negate a homogenisation of content. One of the key factors we hope to shed light upon is what makes material suitable for multi-platform distribution i.e. what are the key attributes that allow content to travel cross-platform? This is likely to influence decisions regarding commissioning as it will determine the prospects for-use across multiple platforms. We expect that the initial interview and observation phase will help inform selection and refinement of a suitable set of attributes in respect of this question. Thus the final development of key parameters for the content analysis phase is likely to be informed by the first phase of research. Content analysis is not an exploratory method and only provides answers within the parameters defined by the researcher. Asking the 'right' questions is, therefore, imperative (Deacon, 2009). For the present study *content bundles* (Van Cuilenburg, 2000) constitute the most obvious unit of analysis as the research aims to make a judgement regarding how multi-platform strategies are impacting content selection and how media diversity is being affected across selected case study television channels, newspapers and magazines.

Beyond the unit of analysis, there are decisions to be made regarding which attributes or features, seen as signifying more or less diverse content, should be selected. There are a broad range of different typologies and corresponding indices which have been utilised in past studies exploring programme diversity. As

well as differences as to whether researchers use the typologies provided by ratings organisations and industry publications or ones which they have devised themselves, there are further disparities in how previous studies have calculated their diversity indices. One common and simplistic method is using a 'top three' index where the proportion of programming constituted by the top-three types of programme is measured with the higher proportion signifying lower levels of diversity. An alternative to this is the 'relative entropy' measure which takes into account the number of different categories on offer and the relative concentration within these. A further popular method is the Herfindahl-Hirschman Index (HHI) of concentration which is used in the US. This sums the squares of each programme type's share of the total number of available programmes or hours of available programming. Whilst, there are some problems there are some problems in using these categorisations Napoli (2009: 243) maintains that 'they represent the only reasonably simple and objective method of tapping into content differences within media products'.

Another question which needs to be addressed is whether the content analysis will incorporate a longitudinal approach. It would be possible to conduct the analysis at a single point or at a number of points over the 2012-14 period. Reliability and validity are likely to be improved by focusing on more than one point in time to facilitate identifying anomalies (Williams et al, 1988). Nonetheless, there is a myriad of factors which could potentially shape differences in content at alternative points in time and the total time period may be, at best, too short to do this accurately and, at worst, misleading. As the time period for the analysis would be quite short it is less likely that there will be significant disruption in business models, patterns of media consumption and structural change in the industry for example over a period of one to two years. The opportunity costs of the addition of a temporal perspective to the study must be considered. Despite the wider project timeline operating from 2007-13, it is challenging to consider retrospectively analysing content from previous years as it is unlikely that there will be able to access the full range of content available at that point in time. As already noted, the content analysis phase is not being conducted in isolation and it is expected that valuable information about longitudinal change will be secured through qualitative interview and observation data.

Previous studies of programme diversity have tended to focus on a single sector, for example the radio sector as in Compaine and Smith (2001). In their research into the diversity of content provided by internet radio stations diversity is characterised as the variety of programme formats and the number of stations available to listeners under unrelated ownership (Compaine and Smith, 2001). Carpenter (2010) also looks at a single sector, newspaper publishing, and, using the unit of analysis of a single article, she explored whether online citizen newspapers journalism were offering a diversity of topics as well as use of hyperlinks and links to photos, audio, video, information graphics etc. Larsson (2012) presents a study

of the websites of Swedish newspapers and how they make use of interactivity, with the rationale as this is the defining character of the internet medium. Larsson uses Chung's (2008) typology of interactive features and, in order to operationalise this model, thirty four codes were created to reflect categories of interactivity. These studies provide useful ideas for the research methodology of the present study, but all contain a sector-specificity which somewhat limit their application in our cross-sectoral approach.

In terms of a study which does explore content diversity across sectors, Lin and Jeffres (2001) looked at whether the media reflect their traditional strengths and features through their online ventures. They conducted a content analysis of newspaper, radio and television station websites in major US cities comparing the 'content', 'communication' and 'technical aspects' of these websites. In reporting the findings of their study, Lin and Jeffres (2001) reflected on some of the gaps in existing empirical research. They found studies conducted previously had tended to be limited to a single medium and there is little evidence that recent studies have filled this gap. Whilst their work does provide some illumination regarding approaching cross-sectoral research, the focus of the study was on a single platform – websites – which does ameliorate some of the challenges. Within the present study it is the intention to compare across platforms as well as sectors.

Related to the problem of assessing content diversity across platforms, one of the challenges this study faces relates to finding an appropriate and comparable means of measuring inherently different sorts of content. Few methodologies appear to exist that enable cross-comparison between newspapers, magazines, online and broadcast output. Earlier studies focusing on *news* output (e.g. at Goldsmiths, Westminster and Cardiff) have involved monitoring factors such as topics covered, style and tone and the range of sources that frame the news (see, for example, Lewis et al, 2005). In the case of *entertainment* output, the key variables are more likely to focus on characters and storylines. As we are analysing content across sectors, it is likely that for manageability we will focus primarily on selected categories or genres of content such as news, youth programming and drama. Once a suitable sampling frame is devised we plan to code content in order to assess levels of diversity within the composition of output in these selected categories. An interesting methodological question is whether to use typologies suggested by industry or to adopt and adapt those used in earlier academic research or to devise new categories of content for the current study. Existing typologies are usually sector-specific and therefore not well suited to our research objectives. Since our project involves applying measures in a multi-sectoral context, we hope to devise parameters that can be applied in analysis of this sort.

For the purposes of the current study, a scheme is needed which is appropriate both to evaluating levels of diversity within the composition of news and entertainment content and content outputs. In addition, the

approach taken needs to uncover the impact of multi-platform delivery in relation to content re-cycling strategies and to generate insights in relation to degrees of originality versus re-usage of content. As one of the priorities is to instigate measures that enable us capture practices of re-use of particular content properties across differing delivery platforms, we are experimenting with the idea of coding for attributes such as celebrity-based or controversy-based content that can be operationalised across multiple differing content forms, formats and categories.

Our ambition, which we hope this workshop will enable us to advance conceptually and critically, is to develop a yardstick suited to a multi-platform multi-sectoral research context that enables key and basic parameters of content diversity to be identified and traced within and across content forms and delivery formats and over time.

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