

## **The Absence of Structural Americanization: media system developments in six affluent democracies, 2000-2009**

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The notion of “Americanization” is frequently invoked in discussions of international media developments. Over the last decade, Albert Salon, president of the Forum Francophone International, has decried the “Américanisation” of French media, some commentators have seen the political success of the telegenic Gerhard Schröder as evidence of an ongoing “Amerikanisierung” of political communications in Germany, and the Labour Peer Lord Putnam has warned that commercialization and deregulation is leading to the “creeping Americanisation” of the British media landscape. The term is familiar from most debates over changes in the media and political communication, perhaps in particular in Western Europe.

This article focuses on one particular aspect of the discussion around Americanization, and asks whether we have in fact seen an ongoing structural convergence on a basically American form of media system within the world of relatively similar affluent Western democracies over the period from 2000 to 2009, as has been widely predicted. It does not directly address other aspects of the multi-faceted notion of Americanization, concerning for example the prominence of American-produced content and services in media across much of the world (especially in broadcasting and online), or the potential spread of journalistic professional norms and practices associated with American journalism. It concentrates instead on basic developments in the structural properties of a sample of six strategically selected national media systems to test the convergence hypothesis associated with the work of Daniel C. Hallin and Paolo Mancini (2004a, 2004b, 2011, 2012) but also, in different varieties, many others (including Blumler and Gurevitch 2001, Humphreys 1996, and Swanson and Mancini 1996). The analysis demonstrates a relative absence of structural Americanization over the decade in question. The period from the 1970s to the 1990s saw

considerable change in Western European media systems in the form of a relative de-ideologization and increased market-orientation of much of the press as well as deregulation of national broadcasting markets and the end of public service monopolies (where they existed) and thus in key respects moved these media systems closer to the heavily commercialized American system (Humphreys 1996). The 2000s has seen equally dramatic changes in the media, but little system convergence in terms of the basic structural properties of the news media industries. The article argues that the main structural changes identified are better summarized as a combination of (1) parallel displacements, (2) persistent particularities, and to some extent (3) new peculiarities. The unexpected absence of structural Americanization may be due in part to changes in how the political, cultural, economic, and technological forces that drive media system developments interact in the twenty-first century.

The first part of the article presents the organizing concept of “media systems”, the convergence hypothesis, and the comparative research design used to test the hypothesis. The second part of the article uses data on developments in newspaper industry revenues, commercial broadcasting revenues, levels of internet use, and public funding for public service media organizations to test the convergence hypothesis and documents the relative absence of structural Americanization in the six-country sample examined (including Finland, France, Germany, Italy, the UK, and the US). The third part of the article summarizes the trends identified as parallel displacements, persistent particularities and to some extent new peculiarities. The fourth part discusses the combination of causal forces that can help account for the absence of structural Americanization and thus advance our understanding of how media systems develop over time.

## Media systems, the convergence hypothesis, and research design

The focus of this article is on structural developments over time in national media systems. The term “media systems” has long been used by scholars as a shorthand reference for the agglomeration of media in a particular area (Blumler and Gurevitch 1995, Humphreys 1996, Curran and Park 2000). As used here, a media system is an analytical construct, a term used to signify the aggregate structural properties of the major media organizations active within a given country. While the media active in for example France clearly do not constitute a single, discrete, and coherent whole neatly delineated from media in other countries, the assumption is that it makes analytical sense to speak of a “French media system” in the same way as one can usefully speak of a “French population”, a “French economy”, or a “French political system” even as people, money, and power all exceeds national boundaries.<sup>1</sup>

Recently, the term “media system” has been associated especially with Daniel C. Hallin and Paolo Mancini’s Comparing Media Systems. In this book and several subsequent publications, Hallin and Mancini (2004a, 2004b, 2012a, 2012b) have suggested that national media systems can be compared along four dimensions, namely (1) how developed the media market is, (2) the extent to which media organizations are directly or indirectly intertwined with the political system and partisan disputes, (3) the development of journalistic professionalism, and (4) the degree and character of state intervention in the media sector. They argue that the media systems of similarly affluent democracies in North America and Western Europe can be categorized according to their relative proximity to three empirically-grounded ideal typical models when analyzed along these lines. The first model they call the “Liberal Model”, which they see as characterized by the relative dominance of market mechanisms and commercial logics across the media sector. The US media system is seen as the closest approximation to this model. The second model they call the “Democratic Corporatist Model”, which they see as characterized by the co-existence of commercial

media, media tied to civil society and political groups, and public service media. The media systems of the Scandinavian countries and Germany are seen as particularly close to this ideal type. The third model they call the “Polarized Pluralist Model”, which they see as characterized by weakly developed commercial media, a high level of interpenetration between media and politics, and substantial state intervention in most media sectors. Many Mediterranean European media systems are seen as close to this model.

In their book, Hallin and Mancini do not only develop a conceptual framework for comparative media analysis and a set of ideal types for understanding late 20<sup>th</sup>-century Western media systems. They also suggest that the structural differences between these systems are eroding. According to them, their “Liberal Model” of almost wholly commercialized media and very limited direct state intervention has “clearly become increasingly dominant across Europe as well as North America.” (Hallin and Mancini 2004a: 251) The “structures, practices, and values” associated with US media are, in their view, “displacing, to a substantial degree, those of other media systems.” (Ibid.) Hallin and Mancini identify “Americanization” as one of the main manifestations of a deeper trend of “homogenization” and write of “a significant degree [of] convergence of world media toward forms that first evolved in the United States.” (Hallin and Mancini 2004b: 26) While Hallin and Mancini do note that there are limits and countertendencies to what they describe as “the homogenization process”, the central trend, they suggest, is one towards convergence.<sup>ii</sup>

This article is first and foremost focused on examining whether developments since 2000 has confirmed their predictions when it comes to key aspects of media markets and media policy, and it should be noted that this is only one side of the broader, possible phenomenon of homogenization (or Americanization) discussed by Hallin and Mancini and others.<sup>iii</sup> In Comparing Media Systems, they focus not only on structural convergence, but also changes in political life and forms of journalistic professionalism, drawing in part on

other scholars (including Blumler and Gurevitch (2001), Humphreys (1996), Negrine and Papathanassopoulos (1996) and Swanson and Mancini (1996)). Some of these other researchers are concerned with the dominance of American content in various media systems (a concern shared by Albert Salon, quoted in the introduction). Others are concerned with the dominant forms of political campaign communications (the rise of Gerhard Schröder, mentioned above, could be an example). These other versions of the convergence hypothesis, or alternative aspects of possible processes of homogenization, are not examined in this article. My focus is more narrowly on media system structure, primarily economic and regulatory developments (including issues like the commercialization and deregulation that concerns Lord Putnam).

Testing the convergence hypothesis in its relatively narrow, structural form—the idea that national media systems, at least amongst similarly affluent democracies in North America and Western Europe, are becoming more and more structurally homogenous—requires a clear definition of which variables best capture ongoing change. While Hallin and Mancini’s work has been very influential in comparative analysis of media systems, it has also been subject to some criticism in this respect (much of this debate is reviewed in Hallin and Mancini 2012a and Hardy 2012). Amongst the two most important forms of criticism are those who challenge the variables they focus on, and those who challenge whether the variables Hallin and Mancini focus on can be operationalized in a methodologically rigorous way. In the first camp, scholars have suggested a number of additional variables they argue need to be included in comparative analysis to understand international media developments, highlighting in particular that Hallin and Mancini’s analysis is mostly focused on print newspapers and that it largely ignores the rise of new digital technologies (Norris 2009, Nielsen and Levy 2010). Peter Humphreys (2012), for example, has argued that Hallin and Mancini’s four dimensions need to be supplemented with a number of other salient variables,

including examination of each case country's political history, media market size, degree of ownership concentration, ethnic/linguistic structure, ideological polarization in politics, the character of its political system, as well as its state and judicial tradition. The second camp pushes in a quite different direction and argues that the basic problem with Hallin and Mancini's approach to comparing media systems is not that it is too narrow, but that it is too broad. Pippa Norris, perhaps the most prominent critic of Comparing Media Systems, is blunt. In her view, "the categorization proposed by Hallin and Mancini remains fuzzy, impressionistic, and unscientific" (2009: 334). Norris challenges Hallin and Mancini's attempt to summarize their main ideas in the form of ideal types meant to capture key shared traits amongst the countries grouped as approximating to a greater or lesser extent one of their three suggested "models" and argues that comparative media research can only advance by focusing on clearly defined variables that can be measured and compared in a consistent fashion.

In this article, the comparative analysis of media system developments in the six countries covered is structured in a way that builds on Hallin and Mancini's work while taking into account elements of the criticism leveled against them. The four variables I compare media systems along here are—

- (a) total newspaper industry revenue per capita, as an indicator of developments in the newspaper industry,
- (b) commercial television revenue per capita, as an indicator of developments in the television industry,
- (c) levels of internet use, as an indicator of how new technologies have changed the media system in question,
- (d) public funding for public service media organizations (PSMOs), as an indicator of the relative political commitment to public service media.

Variables (a) and (d) are empirical indicators that correspond to Hallin and Mancini's dimension (1) and (4) (as discussed above) and are furthermore relevant because research suggests newspaper companies and public service media organizations are particularly important in terms of underwriting news production and keeping the wider population informed about public affairs (Project for Excellence in Journalism 2010, Curran et al 2009). Variable (b) has been included to broaden the analysis beyond the newspaper industry to cover commercial television, the single largest media industry and an important underwriter of and source of news in many countries. Variable (c) has been included to accommodate the rise of new digital media, increasingly important not only for how people communicate amongst themselves, but also for how they search for information and access news.

The four variables included here do not allow for an exhaustive analysis of the six media systems in question. They exclude important dimensions highlighted by Hallin and Mancini, including relations between media organizations and political actors as well as developments in journalistic professionalism, and make no attempt to integrate the long list of potentially pertinent additional variables suggested by Humphreys and others (see for example Hardy 2012). It is thus important to recognize that this analysis only captures a few important dimensions of media system developments in the countries covered. The focus is, as said, on media system in terms of industry structures, not practices and values, or content and forms. While this means the article leaves aside related questions concerning developments in forms of journalistic professionalism, political campaign communications, and the nature of news coverage, the advantage of the four variables chosen is that they allow for a parsimonious comparative analysis on the basis of measurable and consistent indicators, and can thus provide a solid basis for testing one important version of the convergence hypothesis and addressing the question of whether we have in fact seen a gradual Americanization of the media systems of other affluent democracies—a structural

homogenization that would in turn have potentially profound implications for news provision and news consumption, as a growing body of research shows significant differences in different media systems' capacity to provide news, diversity of news provision, and ability to keep people informed (Curran et al 2009, Esser et al 2012).

On the basis of the four variables selected, the convergence hypothesis would lead one to expect that

H<sub>1</sub> – newspaper revenue per capita converge towards American levels, as commercialization drives the development of new and more market-oriented newspapers, especially in Polarized Pluralist systems

H<sub>2</sub> – commercial television revenue per capita converge towards American levels, as public service broadcasters lose ground and advertisers and audiences move to private providers in both Democratic Corporatist and Polarized Pluralist systems

H<sub>3</sub> – levels of internet use converge towards American levels, as web access spreads across all media systems

H<sub>4</sub> – levels of public sector support for public service media converge towards American levels, as Western European countries retreat from their previous commitments and become more “Liberal” in their approach to media policy

To test whether this has in fact happened, the analysis focus on a strategic sample of six similarly affluent democracies from North America and Western Europe, namely Finland, France, Germany, Italy, the UK, and the US. The sample includes two countries often seen as approximating each of Hallin and Mancini's three ideal types, namely the UK and the US for the “Liberal Model”, Finland and Germany for the “Democratic Corporatist Model”, and France and Italy for the “Polarized Pluralist Model”. This sample allows for a critical test of the structural version of the convergence hypothesis as all the countries included comes from the set of most-similar systems on the basis of which Hallin and Mancini developed the idea.



If structural convergence is absent here, it is unlikely to be found amongst more- or most-different systems. For each of the six countries, descriptive statistics on media industry developments, media use, and media policy has been gathered from international and domestic sources and vetted by a team of national experts involved in a larger, collaborative research project on the changing business of journalism and its implications for democracy.<sup>iv</sup>

### The absence of convergence in newspaper revenues, television revenues, internet use, and media policy

Closer examination of empirical data on developments in newspaper industry revenues per capita, commercial television broadcasting revenues per capita, levels of internet use, and public funding for public service media organizations does not provide much support for the structural version of the convergence hypothesis. Though American-produced audiovisual content, journalistic professional norms and practices associated with America, and internet services provided by companies based in the US all play an important role in the five European countries covered here, in structural terms, their media systems have not converged on an American model. All media systems are unique in their own way (Humphreys 2012), but, even within the relatively similar population of affluent North American and Western European democracies, the American media system may well be particularly unique (Hardy 2012). The US is an outlier with a media system shaped by the particularities of a very large market serving a continental-size country with a heterogeneous population and a tradition, from the twentieth century onwards, of much more limited active state intervention in the media sector than what is seen in much of Western Europe. The US is very different even from the UK media system that is sometimes classified as another example of the “Liberal Model.” This does not mean, however, that Hallin and Mancini’s overall analysis finds no empirical support from the data reviewed here. While the classification of the US and the UK

as approximations of the same ideal type seems problematic, the similarities between the two “Democratic Corporatist” media systems, Finland and Germany, and the two “Polarized Pluralist” media systems, France and Italy, are more pronounced, both in terms of their structural properties at any given point in time and in terms of how they develop over time. Below, I go through the data for each variable in turn.

It is well known that the first decade of the twenty-first century has been tough on the newspaper industry in most affluent democracies. It is less often acknowledged that it has been particularly tough on the US newspaper industry, which has experienced a loss of revenue that is far greater than that of any of the five other countries covered here. From 2000 to 2009, total US newspaper industry revenues (including sales, print advertising and online) have declined by 44 percent in current terms, from \$196 to \$111 per capita. (The decline is even greater if one takes into account inflation.) Though newspapers have lost revenue in all the six countries covered here, the decline has not been nearly as sharp in the five Western European countries. Figure 1.1 presents the trend from 2000 to 2009.

[Figure 1.1 about here]

France and Italy starts the decade with the weakest newspaper industries, and ends the decade with slightly weaker newspaper industries (down 7 and 9 percent, respectively). The German and British newspaper industries retain their relative position. Both have both suffered over the ten year period, one losing 21 percent of its revenue per capita, the other 17 percent, but the two industries suffered at very different points in time. In Germany, the bulk of the decline happened in the period from 2000 to 2003 as the country’s export-oriented economy was hit by the global recession following the dot.com bust. From 2003 to 2008, per capita newspaper revenues actually increased (alongside growing internet use), till another global

recession hit. In the UK, in contrast, revenues were relatively stable till 2007, and then started declining rapidly under the double impact of the financial crisis and an accelerated migration of advertising from print to online. The Finnish newspaper industry, buoyed by its exceptionally high circulation figures and the high percentage of advertising placed in printed newspapers in Finland, has felt the impact of the recession and the rise of the internet towards the end of the period, but remains in an enviably robust position.

The aggregate per capita figures for newspaper industry revenue give an overview of the overall changes from 2000 to 2009. Most industries have lost revenue, though how much differs, and all countries retain their relative positions. What these figures do not reveal is an underlying change in the composition of newspaper industry revenues. Across all six countries, sales revenues have been relatively stable as increased prices compensate—in the short run—for eroding circulation, but advertising revenues have decreased, often dramatically. In 2000, sales revenues constituted just 12% of overall revenues for the US newspaper industry, and between 35% (Germany) and 53% (France) of revenues in the European countries. By 2009, the figure had grown to 19% in the US and was between 49 and 55 percent in the five European countries.

Looking at newspaper industry revenue per capita, there is no support for  $H_1$ , the hypothesis that newspaper revenues are converging on American levels. Revenues have continued to diverge for the period 2000-2009. The European countries have seen some erosion in their newspaper industries but each has retained its relative position. In contrast, the US industry has experienced a dramatic decline. Furthermore, the underlying composition of revenues remains very different from country to country. If anything, US newspaper companies are actively trying to change their business models to make them more like those prevalent in Europe (by increasing sales revenues and expanding ancillary businesses built on the newspaper brand).

Turning to developments in commercial television broadcasting, the US again stands out as not only different from the five European countries, but also persistently so. Whereas much of the newspaper industry has struggled over the last decade, commercial television has grown rapidly in all the countries covered here, with the sole exception of Germany. Figure 1.2 presents the basic trends from 2000 to 2009.

[Figure 1.2 about here]

The central driver has been the rise of pay television, which has moved the commercial television industry away from its historic dependence on advertising and towards a more mixed model that includes increasing sales revenues. Though the collapse of KirchMedia in Germany and ITV Digital in the UK in 2002 and the troubles faced by providers like Telepiu in Italy around the same time led some to speculate that there was limited consumer demand for pay-TV services in Europe, the sector has grown rapidly since. Even as television advertising revenues have been battered by the recessions of the early and late 2000s, sales revenues have continued to grow. Total commercial television revenues have grown about forty percent in current terms from 2000 to 2008 in every European media system save Germany (which has seen almost no overall growth because declines in television advertising have balanced growth in pay TV).

The growth of pay TV has transformed the dynamics of many television markets, where previously dominant free-to-air broadcasters, both private and public, suddenly face increased competition for viewers' attention, for advertising, and for exclusive rights for premium content from increasingly well-heeled pay TV competitors. In Italy, the traditional RAI-Mediaset "duopoly", pitting the public service media organization against Silvio Berlusconi's private commercial TV conglomerate has been shaken up by the arrival of Sky

Italia—though Rupert Murdoch’s Italian operation drew only about 4% of total TV viewing in 2009, its annual revenues of €2.6 billion were not much smaller than those of the two free-to-air giants. In the UK, the success of BSkyB (where Murdoch’s News Corporation owns a 39.1% controlling stake) has turned the pay TV company into the country’s largest broadcaster.

The growth of pay TV in Europe lends some credence to the convergence hypothesis. Pay TV is one of those “[media] forms that first evolved in the United States,” to quote Hallin and Mancini again. But, arguably in part due to the differences in market size that for example Peter Humphreys (2012) has argued comparative media researchers need to take into account, the sector has developed somewhat differently in most European countries. First, commercial television is still overall not nearly as strong in Western Europe as it is in the United States, (as can be seen from the massive differences in per capita revenue documented in figure 1.2). Both advertising and sales revenues are lower. Second, while pay TV has grown in many Western European countries over the period 2000-2009, it has grown at an even faster pace in the US. The combined commercial TV sector there saw per capita revenue grow more than 60 percent in current terms from 2000 to 2009. And, importantly for understanding the wider societal implications, the rise of multi-channel television has yet to spur the kind of audience fragmentation in Europe that is has spurred in the United States. From 2000 to 2009, the combined audience share of the three most popular channels (a common metric of overall fragmentation) fell from 23 to 16 percent in the United States. Across Western Europe, the biggest television audiences were gradually eroding too as more and more viewers opted for niche alternatives, but the combined share of the three largest channels still accounted for between 39 percent (Germany) and 62 percent (Finland) of all viewing (Nielsen 2012).

Looking at commercial television revenue per capita, there is limited support for H<sub>2</sub>, the hypothesis that commercial television revenue per capita is converging on American levels. Revenues have grown rapidly in most European countries, driven in large part by the rise of pay TV, a form of media that evolved earlier on in the US. This development has been accompanied by some audience fragmentation, a phenomenon also well-known from the US. But both the growth of commercial television and the ongoing fragmentation of audiences took place at a faster pace in the US throughout the period from 2000 to 2009, meaning that the structural differences between America and most European countries actually in some respects increased.

Turning next to internet use, the basic trend is well known—rapid growth across all affluent democracies. By 2009, internet use was a majority activity in all countries considered here save Italy, a laggard with only 49 percent of the population categorized as internet users by 2009. While the US had the highest levels of internet use in 2000, it has since fallen somewhat behind affluent North-Western European countries like Finland, Germany, and the UK. By 2009, France and the US both counted about 70 percent of the population as internet users, whereas the figure in several European countries was around eighty percent. Figure 1.3 presents the trends in internet use from 2000 to 2009.

[Figure 1.3 about here]

As with pay TV, the combination of the historical origins of the contemporary internet as an invention with deep roots in America, its early diffusion in the US, the outsize influence of US-based organizations like the non-profit ICANN in managing key infrastructural aspects, and the dominant role played internationally by American-based companies (including today most prominently perhaps Google and Facebook) lends some credence to

the idea that the internet is another one of those media form that first evolved in the United States. (Indeed, it has been held up as a possible “agent of Americanization” (Kroes 2003).) But just as with printing and broadcasting technologies, increased international diffusion seems to be accompanied by some degree of diversification in terms of forms of use. Surveys by different organizations including the World Internet Project, the OECD, and Eurobarometer have all consistently found that patterns of use—even amongst countries with similar overall levels of use—differ in important ways. While Germany and the US have broadly comparable levels of internet use and similar levels of use for some activities like emailing and online banking, other forms of use diverge in significant ways, such as accessing news online or maintaining a personal blog (both more widespread in the US) (see for example OECD 2010). Also, online news provision has developed very differently from country to country. In the US, online-only providers like the Huffington Post have risen to some prominence, while Western Europe has seen very few sustainable journalistic online start-ups (Bruno and Nielsen 2012).

Looking at developments in internet use, there is limited support for H<sub>3</sub>, the hypothesis that levels of internet use would converge towards American levels. Use is increasing in all the six countries covered, but it is not clear that they are converging on a particularly American form, and though US-based nonprofits and companies play an important role online and dominate many sectors online, patterns of use continue to diverge in important ways, suggesting there are many important similarities in internet use from country to country, but no single model of internet use dominant across all affluent democracies.

Turning finally to public sector support for public service media organizations (PSMOs, often still referred to as PSBs because of their roots in broadcasting), the decade

from 2000 to 2009 has been characterized by a great degree of stability, as is clear from figure 1.4.

[Figure 1.4 about here]

Licence-fee funding for some public service broadcasters like YLE (Finland), ARD and ZDF (Germany), and the BBC (UK) have increased broadly in line with inflation, allowing these PSMOs to maintain their absolute resource base even as they face increased competition for audiences from commercial operators, some of whom have benefited from the growth in pay TV. In France and Italy, where PSMOs like RAI and France Télévisions depend on a mix of public sector support and advertising revenues, public funding has been flat and gradually eroded by inflation (both the Sarkozy government in France and the Berlusconi government in Italy have, for various reasons, restrained public support for PSMOs). In the US, government funding for the Corporation for Public Broadcasting (which in turn supports the PSMOs PBS and NPR and their member stations) has been stable, though it has been subject to sometimes intense political criticism. Though much of the rest of the media world has been in upheaval over the last decade, the pattern in place in 2000 was still in place in 2009 when it comes to public sector support for public service media organizations in all six countries. Finland, Germany, and the UK provide comparatively high levels of licence-fee funding for strong integrated PSMOs. France and Italy provides comparatively more moderate funding for PSMOs that also depend on advertising revenues. The US provides comparatively low levels of public sector support for PSMOs who are highly dependent on sponsorships and donations. (A wider review of public sector support for media suggests press subsidies too have remained relatively stable over the decade (Nielsen 2011)).



Looking at per capita levels of public sector support for public service media, there is no support for H<sub>4</sub>, the hypothesis that funding would converge on American levels. The US is and remains a clear outlier with its very low levels of support for PSMOs. And the remaining countries have continued to pursue their national policy traditions when it comes to the basic forms and scale of support for PSMOs.

#### Parallel displacements, persistent particularities, new peculiarities

The evidence reviewed offers little support for the convergence hypothesis. While the growing prominence of pay TV and the rise of the internet can to some extent be seen as examples of the increasing importance of media forms that first evolved in the United States, both have in many ways developed in quite different ways across Western Europe compared to the US. Developments in the newspaper industry and in public sector support for public service media exhibit no convergence on an American model. The tendencies towards convergence—or “Americanization”—that were visible as party newspapers were commercialized from the 1970s onwards and public service broadcasting monopolies brought to an end by deregulation of television and radio markets in the 1980s and 1990s have not been succeeded by further structural homogenization in the 2000s. The structural properties of the six media systems analyzed here remain distinct and different. They all changed, but not in ways that made them more alike in terms of the basic structure of their news media. The empirical developments documented here are more usefully summarized as a combination of (1) parallel displacements, (2) persistent particularities, and (3) some tendencies towards new peculiarities than as media systems converging on one, American, model.

First, judging from this six-country sample, media systems across North America and Western Europe have seen parallel displacements in terms of newspaper industry revenues

per capita, in terms of commercial television industry revenues per capita, and in terms of the increase in internet use. The pace of change differs from country to country, but the direction of travel is broadly speaking the same. Newspaper companies in all six countries remain overwhelmingly dependent on their legacy print business, which is in decline as audiences and advertisers migrate to other media and the recession takes its toll. Commercial television in all six countries is in the throes of a large-scale shift from being mostly based on free-to-air broadcasting and advertising to a multi-channel environment mixing ad-supported free channels with a growing number of pay TV offerings. Internet use has increased across the board (though growth has tapered off and universal access far from achieved).

Second, media systems across North America and Western Europe exhibit persistent particularities as inherited habits of media use, industry structures, and national policy-making traditions continue to condition present developments. Many of the basic, systemic, differences between the six media systems examined are the same in 2000 as they were in 2009 (illustrating the empirical utility of Hallin and Mancini's ideal types). Newspaper industries were much more robust in North-Western Europe in 2000 than in the Mediterranean. That was still the case in 2009. Public service broadcasting was dependent on both public sector support and advertising in France and Italy in 2000, and was comparatively speaking very weak in the US, whereas PSMOs in Finland, Germany and the UK benefited from comparatively high levels of funding. This was still the case in 2009. Despite the sometimes dramatic developments of ten years that have shaken the media world in many ways, some basic structural features have remained stable.

Third, developments from 2000 to 2009 in the six media systems analyzed suggest the possible emergence of some new peculiarities. Most visibly, the US media system is not only very differently structured from even Anglophone European countries like the UK at the outset of the period. It has also developed in very different ways over the last decade. The US

newspaper industry has suffered much more than its counterparts elsewhere. The US commercial broadcasting industry is not only much stronger, in relative terms, than its European counterparts. It has also grown at a faster pace. Internet use in the US developed earlier than in many European countries, but dissemination seems to have stalled at a lower level than in other affluent democracies, and forms of use differ. Non-profit and online-only news organizations have found some sustainable niches in the huge US market, but few even in large Western European countries like France, Germany, and Italy (Bruno and Nielsen 2012). The American media system remains exceptionally exceptional (Hardy 2008)—there are no other systems like it, or even becoming very much more like it.

Explaining the absence of structural Americanization—are the drivers of media system developments changing?

The analysis presented here raises the question of how one explains the absence of structural Americanization over the period 2000 to 2009. Why is it that the convergence hypothesis, the idea that the 2000s would see a continuation of trends well-known from the 1970s onwards where at least Western European media systems in some key ways became structurally more like the American one, has found very limited empirical support? To address this question, it is necessary to examine more closely the forces usually seen as the main drivers of media system developments.

In Comparing Media Systems, Hallin and Mancini (2004: 251ff) identifies political and cultural forces as the main factors behind media system divergence, and economic and technological forces as the main factors behind structural convergence. In this, they are in line with other comparativists, like Peter Humphreys (1996). Both Hallin and Mancini and Humphreys offer convincing analysis of how political and cultural differences help explain key post-WWII differences in how the media systems of otherwise similarly affluent

democracies developed, and identify political changes in the 1970s and deregulatory policies pursued from the 1980s onwards as key factors behind the tendencies towards convergence observed in the late twentieth century. The overarching narrative is one of a shift from a situation in which the forces of divergence (culture and politics) were pitted against the forces of convergence (economics and technology) in the immediate post-war years (from the late 1940s to the late 1960s) to a situation in which cultural differences ultimately mattered less for how media systems developed than the combination of political changes, deregulatory policies, market forces, and new technologies all pushing in the same direction (from the 1970s onwards). In this narrative, media systems are different essentially for historical reasons, but become less so over time because of a combination of powerful forces working towards structural homogenization. This story, with its emphasis on the importance of path dependence, can help explain the existence of the differences documented throughout this article. But the theoretical logic behind the convergence hypothesis does little to account for the persistence of differences actually observed from 2000 to 2009, let alone the occasional trends towards increased divergence.

Looking at the three broad trends of parallel displacements, persistent particularities, and new peculiarities, it is clear that these different phenomena call for different explanations. Fully accounting for the often dramatic developments that many media systems have undergone during the first decade of the twenty-first century will obviously require much more than a single article, but as a first approximation one might suggest that the parallel displacements are broadly associated with technological change and how media organizations, media users, and advertisers have reacted to it (increased competition for audiences and advertising as a result of a vast increase in media choice driven in large part by the rise of multi-channel television and the spread of the internet). The persistent particularities, in contrast, seems much more rooted in inherited political, cultural, and

economic differences as national media policy traditions are maintained, media habits built over decades change only slowly (especially for older generations), and different legacy media business models remain relevant even when under increased pressure from new alternatives appealing to the same audiences and advertisers (essentially an argument about what institutionalists call “path dependence”, a term invoked by Hallin and Mancini (2004) as well as Humphreys (1996, 2012)). New peculiarities, finally, such as the relative prominence of non-profit and online-only news organizations in the US, are surely rooted partly in political and cultural differences, but also seem to reflect different interactions between technological developments and economic forces as lowered barriers to entry, cheaper content-production, and easier forms of dissemination coupled with vastly increased competition can result in the proliferation of niche media in a large media market like the American one but may not underpin major new entrants in smaller European markets, simply because of an absence of critical mass.

Even such a brief examination of the interplay of forces driving different aspects of media system developments suggests a need to revisit our theoretical understanding of how media systems change over time. The idea that differences in politics and culture are the main factors behind divergence, and that economic and technological factors in contrast drive convergence seems problematic, for example. This is in part because of assumptions about how these factors work and interact that rely in part on how they worked in the particular setting of mid-twentieth century Western “mass societies.” Economic forces and technological developments have been seen as the drivers of structural convergence between media systems by Hallin and Mancini, Humphreys, and others because media systems have been seen through the lens of mass media, mass production, and mass markets.

In a condensed form, the theoretical reasoning behind this aspect of the convergence hypothesis (the part of the explanatory logic that is not about politics, but about capitalism)

goes as follows—if the commercial logics of the media sector leads media companies to seek to maximize their audience, the development of new technologies that let companies produce more content and reach more people gives an advantage to large players who can invest in such equipment, who can spend on the production value and volume of content, and who can still keep prices low at the point of consumption by leveraging economies of scale and the indirect subsidy offered by advertisers interested in reaching large numbers of people. Such companies are the “catch-all media” that Hallin and Mancini write about (2004a: 267), mass media who mass produce content and constitute their large, undifferentiated audiences as mass consumers on mass markets. Unchecked by regulation, such catch-all media can over time crowd out smaller players, leading to standardization, market concentration, and the dominance of companies that can use the comparative advantage of large home markets to dominate neighboring markets—it can lead to commercialization, to structural convergence, to “Americanization.” And indeed such trends were visible in much of Western Europe in the late twentieth century.

But the absence of structural Americanization in the early twenty-first century documented here suggests the logic behind this story may be changing in subtle ways today. This change takes nothing away from the fundamental points made by Hallin and Mancini, Humphreys, and others about media systems as defined by political, cultural, economic, and technological forces, but recast how we understand the interaction between these forces (and hence the likely outcomes) at a different historical conjuncture. Hallin and Mancini were writing about “catch-all media” at a point in time where most major broadcasters and newspapers were giving up on the idea that you could appeal to everyone all the time. The change in question is an aspect of a broader move away from the paradigmatic forms of twentieth-century “mass societies” with their concomitant mass media, mass production, and mass markets towards a new situation increasingly characterized by more fragmented media

landscapes (Neuman 1991), flexible specialization in production (Priore and Sabel 1984), and niche marketing (Turow 2011). Because media are highly endogenous institutions, these broader changes change how media systems operate and develop. If we are moving from a situation in which the mass media industries were one of the last holdouts from a receding production-centered “Fordist” model to a situation in which media industries are increasingly operating on more user-oriented “post-Fordist” premises that match the rest of the economy of most affluent democracies, then economic and technological forces can in fact combine in ways that result in divergence, or at least media system developments characterized by ongoing structural differences (rather than the hypothesized convergence). In a “Fordist” environment, economic and technological factors conspire to favor standardization, but in a “post-Fordist” environment, firms have both the means and the motives to cater to niche audiences, and as long as people’s interests differ, companies will succeed by catering to these different interests. Thus, the American, the French, and the German media system remain very different today in part because of inherited political and cultural differences (the traditional barriers to convergence), but also because contemporary economic and technological forces—no longer premised on mass production for mass markets, but increasingly on tailored production to niche markets—no longer necessarily erode systemic differences.<sup>v</sup>

### Conclusion

Though many media commentators and researchers have talked about the supposed “Americanization” of media systems across the Western world, the evidence reviewed here offers little support for the structural convergence hypothesis associated in scholarly circles in particular with Daniel C. Hallin and Paolo Mancini’s work. In their 2004 book Comparing Media Systems, they predicted the impending “triumph” of structures, practices, and values

associated with US media, but data on newspaper industry revenues, commercial television industry revenues, internet use, and public sector funding for public service media from a strategic sample of six affluent democracies demonstrates that the media systems of Finland, France, Germany, Italy, the UK, and the US have remained structurally clearly distinct over the period from 2000 to 2009 (despite the tendencies towards homogenization seen in preceding decades). There may be convergence in other areas, like the dominant forms of political campaign communications, in professional cultures, or perhaps in content and form. But as I have shown here, there is little evidence to support the idea of structural convergence on an American model.

Instead of convergence, the main structural developments identified in this article are better summarized as a combination of (1) parallel displacements, (2) persistent particularities, and (3) the emergence of some new peculiarities. Given the absence of structural Americanization amongst these most-similar affluent democracies, it is not clear we should expect pronounced structural convergence amongst more- or most-different case countries. (Indeed, as Hallin and Mancini (2012: 284-285) note, the contributors to their edited volume Comparing Media Systems Beyond the Western World generally dismiss the idea of global convergence on the “Liberal Model”—see for example McCargo 2012.)

The analysis presented here deals only with a limited number of key structural variables derived in part from Hallin and Mancini’s work and leaves out other possible indicators of other forms of system convergence, such as the potential erosion of differences in journalistic practices and professional ethics, an increased role for US-produced media content and services, or the dominance of US-based media organizations. More research is needed to present a full-fledged empirically-based comparative analysis of these other aspects of international media developments (such as the work done under the aegis of the “Worlds of Journalism” project orchestrated by Thomas Hanitzsch and his collaborators (see for



example Hanitzsch et al 2011)). But looking specifically at central structural properties of the media systems of a sample of affluent democracies, it is clear that they remain distinct and continue to provide different institutional preconditions for news production, the diversity of news provision, and the dissemination of news—structural differences that in turn have implications for how informed the general population is about public affairs in different countries (Curran et al 2009, Esser et al 2012). Whether this is a good or a bad thing substantially depends in part on what aspects of media one normatively holds as most important for democracy, in part on what one thinks of the American media system, and in part on where one finds oneself. (The absence of structural Americanization has different implications in Germany versus Italy.)

In terms of advancing comparative media research, it is not clear that notions like “Americanization”, “Europeanization”, “Italianization” and the like—however rhetorically appealing—are well-suited to capture developments in actually existing media systems. More seems to be gained from empirical analysis of real types organized around key variables than from broad generalizations based on national stereotypes. The argument presented here suggests a further need to revisit our basic theoretical understanding of the forces, and interplay of forces, that drive media system developments to advance truly dynamic analysis of differences and similarities between systems tracked over time. The forces that change our media systems can still be captured under the broad headings of political, cultural, economic, and technological factors familiar to all comparative media researchers. But as media systems around the world change in part as parts of broader transformations pointing beyond the paradigmatic forms of twentieth century “mass societies”, it seems clear that the forces involved in these changes are also themselves changing, and that we should not necessarily expect for example new technological developments—digital convergence, ubiquitous computing, the rise of the mobile web—to have the same structural implications as previous

technological developments. In the late twentieth century, economic and technological forces may have driven media system convergence between otherwise politically and culturally different affluent democracies. In the early twenty-first century, economic and technological forces are certainly still changing our media systems, but it is far from clear that they change points towards structural homogenization, let alone “Americanization.”

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<sup>i</sup> Analysis of some research questions call for more than country-to-country comparisons, adding super- or sub-national levels of analysis (Pfetsch and Esser 2008) or focusing on objects of analysis that do not coincide with geographical territories, such as transnational “media cultures” (Hepp and Couldry 2009).

<sup>ii</sup> Hallin (2009) has on some occasions expressed some reservations about the convergence hypothesis, but in the concluding section of their follow-up edited volume Comparing Media Systems Beyond the Western World (Hallin and Mancini 2012: 284), the two authors call the convergence hypothesis “correct to a significant extent” when it comes to affluent democracies even as they recognize that there has been no pronounced global media system convergence.

<sup>iii</sup> Others have tested aspects of the convergence hypothesis when it comes to news content in newspapers (Benson and Hallin 2007) and television (Aalberg et al 2010) and have found that national differences have generally not diminished over time.

<sup>iv</sup> The article draws on data collected in collaboration with Hannu Nieminen and Kari Karppinen (Finland), Frank Esser and Edda Humprecht (France and Germany), Paolo Mancini and Alessio Cornia (Italy). The author collected the data on the UK and the US.

<sup>v</sup> Comparative political economists interested in production systems and welfare systems have pursued this line of argument for years, arguing essentially that though affluent democracies around the world face similar forces in the form of economic globalization and incessant revolutions in the technological means of production, the outcome is not systemic convergence but an enduring multiplicity of forms with different structural properties and social implications. This is the so-called “Varieties of Capitalism”-approach associated especially with Hall and Soskice (2001). This literature, characterized by its conceptual sophistication and generative mix of qualitative and quantitative evidence, has much to offer to comparative media research.

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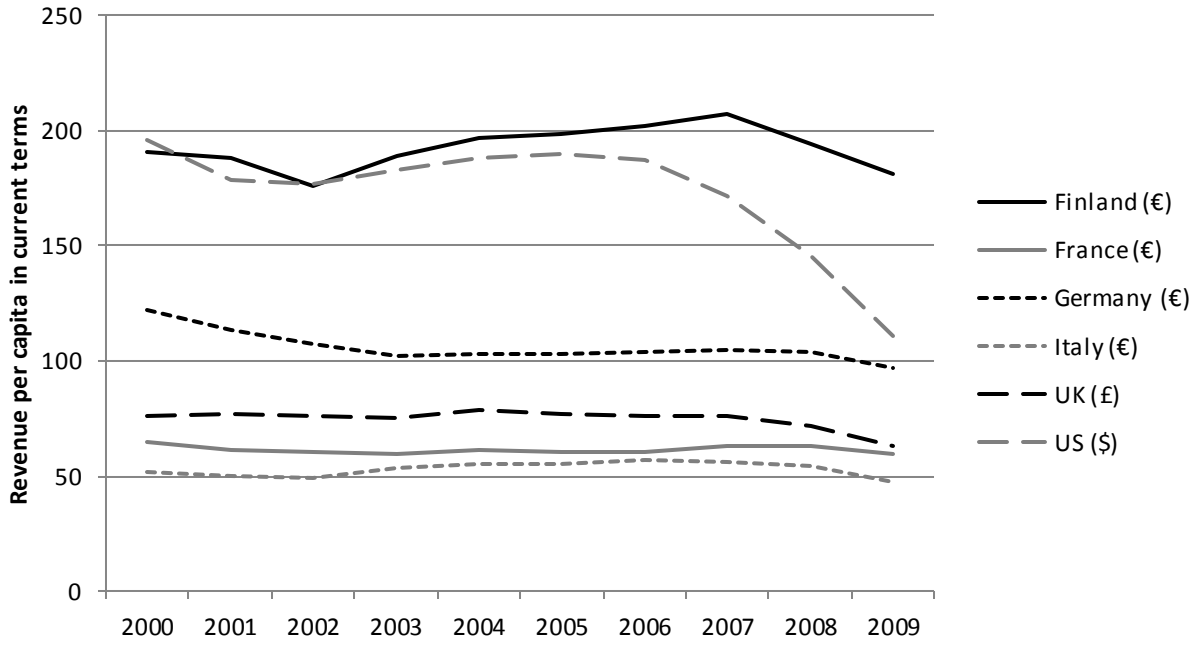
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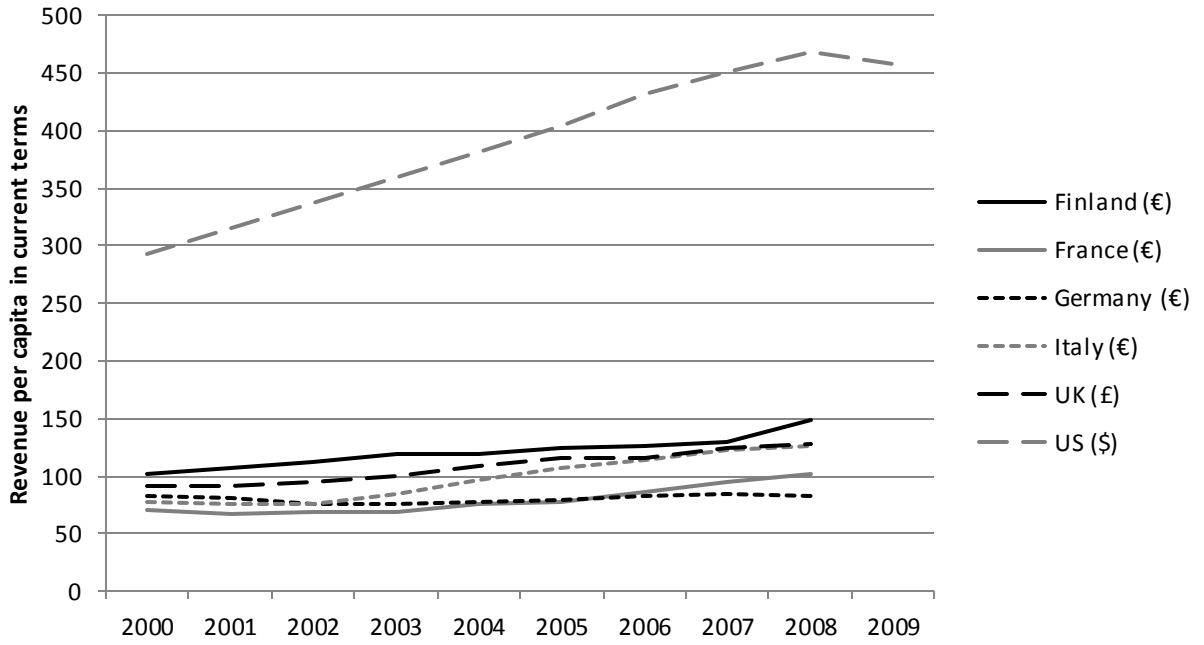
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**Figure 1.1 - newspaper industry revenue per capita**



Revenue data from World Press Trends and Direction du développement des médias/DDM (on France), population data from the World Bank.

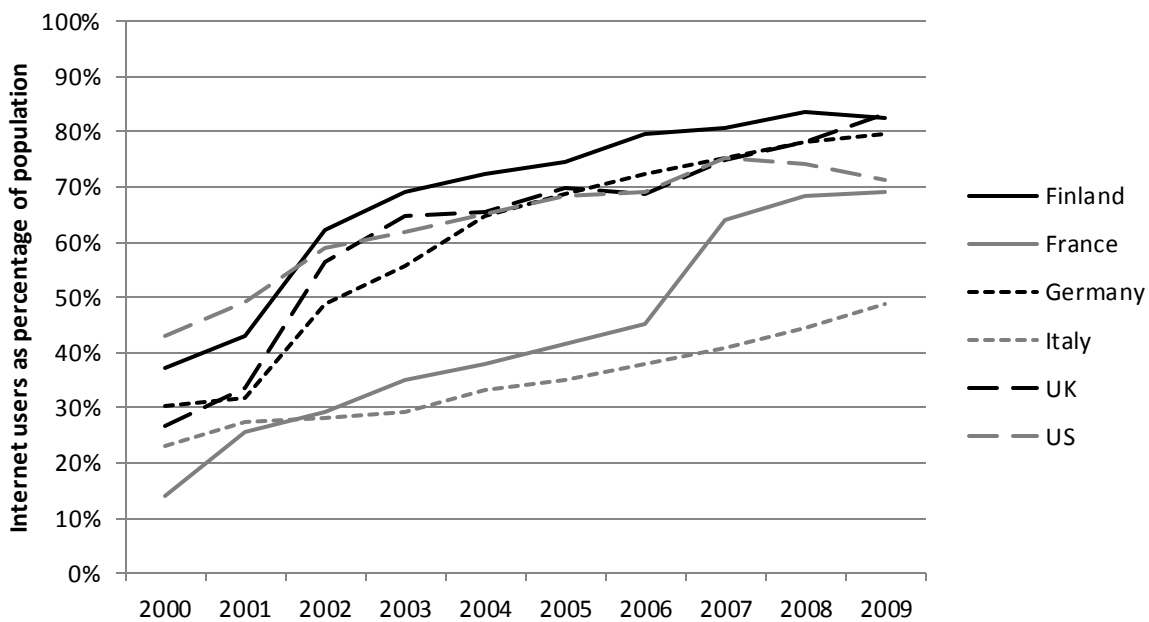
**Figure 1.2 – commercial television broadcasting revenue per capita**



Revenue data from Zenith Optimedia and the US Census, population data from the World Bank.

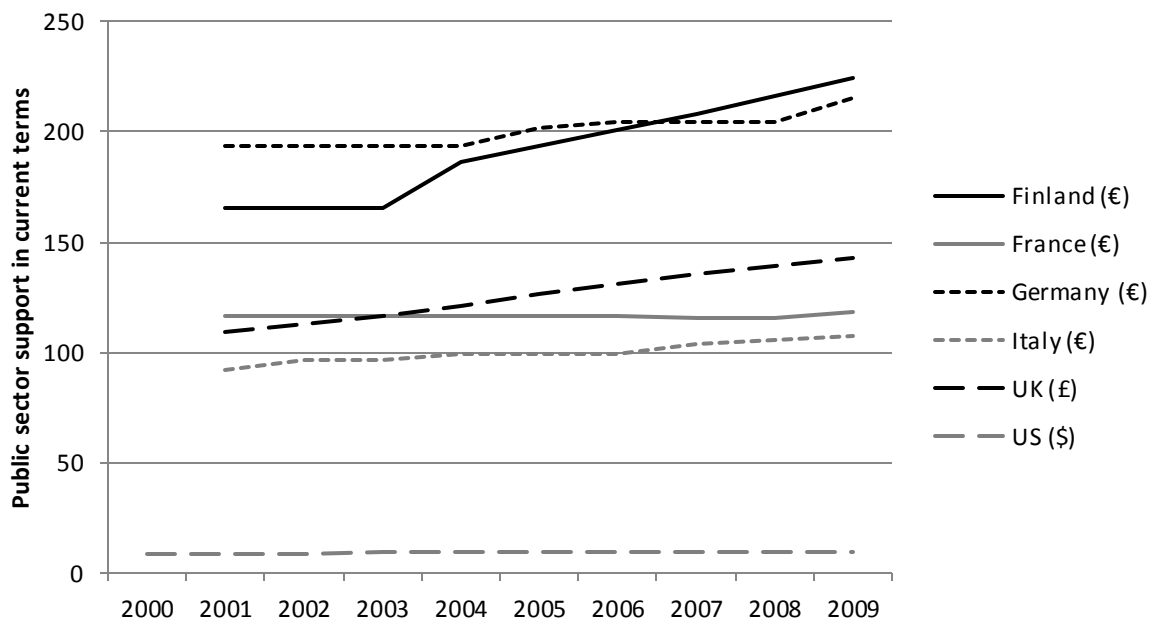


**Figure 1.3 – internet use as percentage of population**



Data from the International Telecommunication Union and the World Bank.

**Figure 1.4 –public sector support for public service media organizations per capita**



Data on public sector support from the European Audiovisual Observatory and the Corporation for Public Broadcasting, population data from the World Bank.