

The changing role of a video-on-demand service in the strategies of public service media

A production study of Danish TV 2 Play and its impact on the production culture of the schedulers, 2016–2022

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ABSTRACT

This article highlights and discusses the main findings from three different media production studies (2016, 2019, and 2022) investigating the changing production culture of the schedulers in public service media. The inclusion of a broadcaster video-on-demand (BVoD) service in the broadcaster's portfolio affected the production culture. First, the article argues that profound changes happened to the organisational framing of the BVoD service's status and its impact on the production practices. Second, the article shows the BVoD service's impact on the content priorities among the schedulers at TV 2 in Denmark and third, how the public service branding of TV 2 became more explicit in the production culture. However, across these three points of impact and the shifts in the strategic focus at TV 2, the business model at TV 2 and its interplay with the public service obligations runs as an undercurrent.

KEYWORDS: video-on-demand services, production studies approach, television scheduling practices, production culture, public service media

Introduction

In this article, I highlight and discuss the main findings of three different media production studies conducted in 2016, 2019, and 2022 to investigate the changing production culture of schedulers in public service media (PSM). The aim is to show how the inclusion of a broadcaster video-on-demand (BVoD) service in the broadcaster's portfolio affected the production culture, with a focus on the strategies and practices of TV 2 in Denmark. TV 2 is a commercially funded PSM company with a 53 per cent share of viewership. TV 2 offers the second most popular video-on-demand (VoD) service in Denmark. Average time spent daily on the service in 2022 was 11 minutes, on par with the publicly funded PSM company DR's BVoD service. Both were just behind Netflix with 13 minutes (Nielsen Company, 2023).

The analysis of how the specific production culture in a "TV-native" company like TV 2 changes (Johnson, 2019) draws on Caldwell's (2008) definition of the concept of production culture, which entails the compiled cultural practises and belief systems among professional content producers. Together with Kirsten Frandsen, I have previously argued that the kind of content produced by a specific production culture needs to be included in the analysis (Bruun & Frandsen, 2022). The content itself is part of a genre schema, which is at the same time structuring the work in a production culture discursively and tacitly as well as being changed and adapted to new circumstances in the company and the industry at large. During the last decade, the schedule – that is, the television super text (Brown, 1984) – and the work of the schedulers have been confronted with growing competition for audiences from international subscription video-on-demand (SVoD) services, and changing viewer habits in general. These developments are changing the conditions for the schedulers' work.

In this article, I use the term scheduler as an umbrella term for several different functions in connection to planning and publishing content on different channels and services. I include heads of planning and publishing divisions and subsections of these divisions, as well as channel schedulers and publishing editors for the BVoD service. I also include the on-air producers in the different stages of the publishing process. The commissioning editors and heads of channels and content at TV 2 are not included in the term. I argue that from 2016 to 2022, profound changes occurred in the organisational framing of the BVoD service's role and its impact on production practices. Second, I show the BVoD service's impact on the content priorities among the schedulers at TV 2. And third, I show how the public service branding of TV 2 became more explicit in the production culture. However, across these three points of impact and the shifts in strategic focus at TV 2, the business model at TV 2 and its interplay with public service obligations run as an undercurrent. Based on these changes, I discuss what can be learned about the strategic and innovative capabilities of PSM in an on-demand media culture, from this short history of the changes to the role of the BVoD service. To discuss this question, I draw on research contributions that have identified

different strategic responses by PSM companies to threats from changes in media technology and new competitors, such as the growing number of SVoD services.

The production culture at TV 2 seems to be relatively quick to adjust and adapt its practices to suit the changing patterns of use in an on-demand media culture. As a result, the PSM company (pro)actively shapes the sociocultural context in which it operates with the explicit aim of future-proofing itself in the industry. At TV 2, this process is strongly influenced by the above-mentioned undercurrent of the business model. Securing the business model seems to be the main driver behind the different strategies applied. Furthermore, an identity branding of TV 2 and its values seems to be important as a guide in the production culture on par with shifting strategic responses to technological change and uncertainties in the television industry.

In the following section, important research contributions to fuel this discussion are presented, followed by a section with key findings from the three production studies. Finally, these findings are discussed in the last section of the article.

PSM's strategic response to technological change in the television industry

During the 2010s, and in the wake of Netflix's international success in particular, media scholars contributed to the notion that traditional time-structured television was being superseded by on-demand access to audiovisual content (e.g., Lotz, 2017). Looking back, a lot of changes have indeed taken place in terms of the production, distribution, and everyday use of television and its content (Lotz, 2022). Competition from transnational (American) SVoD services in Europe has forced the traditional television industry to include in-house BVoD services in their portfolios. Across Europe, the average use of linear television is slowly declining: In 2021, it was 3 hours and 36 minutes a day but showing differences between age groups. 14–25-year-olds averaged 1 hour and 31 minutes, as opposed to the 60+ age group with 5 hours and 30 minutes a day (EBU, 2022). There are differences between the European countries, and in a highly digitalised country like Denmark, there has also been a dramatic average decline from 3 hours and 31 minutes of daily viewing in 2010 to 2 hours and 10 minutes in 2022. The differences between age groups are also supported, and 12–20-year-olds used linear television for only 15 minutes a day in 2022, as opposed to 3 hours and 45 minutes for 51–70-year-olds. The average use of streaming has nevertheless increased to 1 hour and 5 minutes a day in 2022, and the age gap is slowly closing (TV 2, 2023).

For some PSM companies, the overall decline in linear television use among the younger segments of the audience, and especially the overall decline in reach, have made the strategic use of their in-house BVoD services more important. For instance, Michalis (2022) has found a close link between the linear channels and the content of the BBC's iPlayer, and she highlighted the fluidity between “on-line and broadcast spheres” (Michalis, 2022: 526) and the continued relevance

of traditional PSM, even though transnational SVoD services pose a threat in terms of rising production costs and loss of viewers, for instance. Michalis has referred to the case of BBC Three moving online in 2016 in pursuit of younger viewers for PSM, the result of which was a 70 per cent *reduction* in the number of these viewers. In 2019, BBC Three content was also distributed on BBC One to mitigate this problem. The lesson learned seems to be that the interplay between the two modes of watching television and continued linear television distribution was still important for PSM. Nevertheless, in her account of how the BBC iPlayer was used by the BBC in the “third phase of VoD services in the UK from 2014 to 2019” (Michalis, 2022: 528), Michalis highlighted the growing ambition of the BBC on the VoD market. The BBC developed the iPlayer from a seven-day catch-up service in relation to the content published on the linear channels, into a service which provided increased access for viewers to all new and old BBC content. Graige and Johnson (2018) have also described this development of the iPlayer’s role in the publishing of public service content, in which the managerial discourse predicted as early as 2013 that the iPlayer would become a “front door” to the BBC’s content.

A similar interest in understanding how PSM companies are trying to position themselves in the new ways of publishing television content has been investigated further by Donders (2019). Across four European countries and regions (Flanders, the Netherlands, the UK, and Ireland), the assumption is that the online publishing strategies of companies can be explained by market size, business models, and levels of funding as well as the political climate in which companies operate. Based on research contributions, Donders has distinguished between five phases, also termed stages, which seem to characterise the developments: first, an experimental phase; second, the panic phase; third, the expansion phase; fourth, the consolidation phase; and fifth, the maturity phase. Donders (2019: 1014) has argued that this set of stages is not “a linear model”, and it is followed by universal understanding of “the theoretical PSM construct” among the researchers. Donders has highlighted the fact that across research contributions, the shift towards a platform-neutral focus on content distribution is regarded as important if it adheres to the basic values of public service as a concept. Consequently, publishing becomes a far more complicated matter, and the focus is not just on the editorial output alone, but on the needs and wishes of society – that is, the citizens. According to Donders, the popularity of PSM becomes an important part of the theoretical PSM construct.

Donders’s (2019) findings show that PSM companies react rather differently to shared challenges. The distribution strategies are marked by the market size and the exportability of the content as well as the business models, especially financial dependency on commercials. The BBC is regarded as having mature strategies compared with the other companies; however, all these companies aim to innovate and experiment. Furthermore, they all stick to linear publishing because of its continued popularity and the need to ensure the reach of television in all target groups as well as an increased emphasis on the public service brand. Across the four cases, the need for organisational change to achieve the planned distribution

strategies was underscored, but the methods used in the study did not get behind the scenes to investigate what was going on inside the PSM companies.

A similar policy studies approach to the strategic responses by PSM companies faced with the popularity of SVoD services can be found in D'Arma and colleagues' (2021) work. They have analysed the strategies of the BBC, RAI in Italy, and VRT in Flanders, using Napoli's (1998) conceptual framework. According to Napoli, the responses of legacy media to technological change are complacency, resistance, differentiation, and diversification, or mimicry. Napoli's framework was applied to the responses of the three companies and government regulations since early 2000. The regulators are complacent, and the only kind of resistance in evidence is the defence of the licence fee and the increase of quotas for domestic content production. Differentiation is a frequent discursive strategy across the three cases, flagging universal access, diversity in content, and national-cultural importance in specific genres like domestic drama. And finally, mimicry is also a frequent response, with D'Arma and colleagues highlighting many examples of this strategy. The BVoD services have, for example, changed from being catch-up services to being access points for content publication. Furthermore, they have increased the use of personalisation, and their BVoD interfaces have similar layouts and content categories as those found on the international SVoD services. Like Michalis, D'Arma and colleagues have also found examples of diversification or mimicry in collaborations between SVoD services and PSM, for example, Netflix and the BBC, or RAI and HBO. As in Donders's (2019) study, market size and funding are the main reasons for differences in strategies, and a pragmatic attitude and approach seem to characterise all PSM companies in the struggle to adapt and stay relevant.

The aim of this article is to contribute to this body of research, where differences with regard to market size and languages are pointed out as important explanations behind the different strategies. The focus is here placed on another small European market, and the methodological approach is media production studies instead of media policy research. In other words, we move behind the scenes of PSM companies and ask how the production culture of the schedulers is affected by technological change. Across my three studies, I regard schedulers as powerful and creative interpreters (Caldwell, 2008) who work in specific media-systemic contexts, and in specific cultural and historical contexts (Bruun, 2018). As I argue in the following section, the inclusion of new ways of publishing content and the development of new scheduling practices are therefore part of a rather powerful strategic response by PSM to shape the everyday use of PSM and future-proof its position in the television industry.

Key changes in the production culture, 2016–2022

The BVoD service known as TV 2 Play is part of TV 2 Denmark. The company launched its BVoD service in 2004 under the name Sputnik and renamed it TV 2 Play in 2012. TV 2 is a publisher-broadcaster with very little in-house production, and it is a limited company owned by the Danish state. The company is funded

by commercials and subscriptions, and its portfolio contains a main channel with public service obligations and a commercial division with six niche channels, the website (www.tv2.dk), and the BVoD service. This means that TV 2 Play has no public service obligations, even though content from the main channel is available on the platform. Furthermore, as I argue in the following section, the importance of the BVoD service has grown rapidly at TV 2 in the context of an emerging and overarching on-demand media culture. However, the regulatory framework, policies, and broadcasting licence governing TV 2 remain unchanged.

As mentioned above, the findings are based on three different studies at TV 2 in 2016, 2019, and 2022. These three studies were not done with this article in mind but were guided by the question of how scheduling as a professional practice in television was changing. All included questions on the role of the BVoD service, but the three studies also had different objectives and methodological approaches. The 2016 study was focused on the production of the on-air schedule in the multi-channel and multi-platform period of PSM. I conducted 16 face-to-face interviews with producers involved in the different stages of producing this text, and I investigated how social network media and the BVoD service was used in this work. In the field study, I followed the final gluing together of the on-air schedule and I attended the broadcast of the schedule on-air in the evening.

The 2019 study was aimed at understanding the development in the publishing practices on the linear channels in a television industry adapting to an emerging on-demand media culture. Based on the trust gained during the 2016 study, I was allowed to be part of the planning and publishing division at TV 2 for a period of six weeks. This field study included observing meetings on long-term publishing plans, economic conditions and issues, and changes to the daily plans. The detailed knowledge obtained was confidential, but the field study provided me with insight into the everyday practices and values guiding the production culture. It also served as an important background for six non-confidential face-to-face interviews with heads of publishing, the schedulers of the linear channels, as well as the head of the streaming service and editors.

Based on the deep-dive knowledge gained from the 2019 study, the 2022 study was focused on the way TV 2, as a company with public service obligations, integrated linear and non-linear television in the publication practices, with a focus on the role of TV 2 Play. This study included nine formal face-to-face interviews and a field study of the daily work at the editorial desk of the streaming service for three days. The editorial desk was now physically a part of the planning and publishing division at TV 2 with all the schedulers, editors, and managers sitting in a new open office space in a circle. The division between the linear and non-linear television was in this way dissolved.

Across the three studies, two fundamental lessons learned connected to the media productions studies approach need a short elaboration. First and foremost, the issue of getting access to do a study behind the scenes in a media company in harsh competition was relatively easy in these studies compared with other studies I have done. As I argued together with Frandsen (2022), the reason can be a case of good timing. The benefits of knowledge exchange between research

and the industry in a time of disruption and a shared notion of uncertainty about the future of television have no doubt furthered a trust in me and my research interests. This shared notion of uncertainty also helped me to obtain the extended access for the industry-stay in the planning and publishing division, including the many confidential meetings and documents, and so on, especially in the 2019 study. Furthermore, the schedulers are part of what they themselves call the engine room of television, and they are not used to any interest from media researchers. The simple fact of being interested in their work and regarding it as being of growing creative importance paved the way for me as an informed outsider.

A second fundamental lesson learned from the three studies is the difficulties connected to the confidentiality of some of the knowledge obtained in this kind of research using field studies as part of the data collection. On the one hand, the field studies gave me extremely informative and necessary knowledge to answer the research questions. On the other hand, some of the knowledge obtained was often given in confidentiality and impossible to use as documentation to strengthen the validity. In other words, access to the backstage comes with an impact on the dissemination of sensitive and economic details that is often impossible to avoid if the trust relationship is to be maintained for future media production studies. In the following presentation of findings, I mainly use the interview data from the 2022 study for quotes, given the space limitations of the article format.

First: The position of the BVoD service and the increasing editorial power of schedulers

The production culture's understanding of the BVoD service's position in the portfolio of channels and platforms has undergone a rapid and radical change. In 2016, television conceptualised as a linear phenomenon dominated production culture. The focus among schedulers at TV 2 was to attract and retain viewers for each of the channel brands and for the main channel. The main channel, with its 25 per cent share of viewership in Denmark, was still the most important element of the portfolio. The schedulers' focus was on the complicated coordination of the multi-channel portfolio in combination with the website and the promotional use of social network media. This was far more important than the BVoD service. TV 2 Play was described to me as a catch-up service whose objective was to provide time-shifted access to some of the programmes on the linear channels, primarily on the main channel (for elaboration, see Bruun, 2021). It was far more important to maintain traditional subscription revenues from the cable distribution of TV 2's channels in bundles, in combination with spot commercials, than to focus on a possible future income from subscriptions to TV 2 Play. This approach could be seen as a kind of tacit resistance strategy (see D'Arma et al., 2021) with the aim of protecting the traditional business model, even though the BVoD service had been in use since 2012. The head of TV 2 Play at that time, Kurt Holm Jensen, was aware of BVoD service's position in the hierarchy and the financial situation in which it was placed: "TV

2 Play's justification for existence is to support the main channel. It provides catch-up options and preview access to popular content" (Personal interview with author, 7 March 2016). This position of the BVoD service was also visible in the peripheral physical placement of the BVoD staff outside of the planning and scheduling division at TV 2.

Three years later, in 2019, the BVoD service's role had undergone a profound change, with an impact on the overarching publishing strategies at TV 2. This new approach placed more emphasis on elements from an experimental phase (see Donders, 2019) and a mimicry strategy (see D'Arma et al., 2021). The BVoD was now conceived as a service whose aim was to attract and retain young audiences: the first movers on streaming. The strategy, named the "52-week strategy", was to schedule new premium content on TV 2 Play directed at the 15–35-year-old target group, in close cooperation with the youth channel brand TV 2 Zulu. A new division called *Play Content*, resembling a task force, was formed to house this strategy on a day-to-day basis, and the new mindset was presented by the former head of this division, Sune Roland, as follows: "The branding of Play as a unique service with relevant content and not just a catch-up service for the linear channels is hugely important in this development" (Personal interview with author, 9 April 2019).

This new focus meant that the schedulers of the BVoD service and of TV 2 Zulu had to work closely together to secure relevant content production and online-only content for the target group that was given priority. The strategy of having premium content on the BVoD service every week, all year was designed as a response to growing churn rates at TV 2 Play, and this ambition had an impact on the production culture. It moved the focus towards the BVoD's content needs more profoundly. At the same time, the BVoD service was starting to become part of the traditional season planning processes at TV 2 on a par with the linear channel brands. The focus on first movers (young audiences, and their special interests and user patterns) meant that scheduling had been given greater editorial power and a more central managerial position in the promotional and commissioning processes at TV 2. One concrete example was the inclusion of the TV 2 Play planners in the channel planning and publishing division in 2020. Nevertheless, the linear channels were still regarded as the main activity from a financial viewpoint, and in particular, the main channel still took centre stage. What could be seen as almost tacit elements of a resistance strategy (see D'Arma et al., 2021) were still found, supporting Michalis's (2022) findings regarding the development of the iPlayer at the BBC. TV 2 Play was conceived as a new activity in the portfolio, much like a new channel with special needs, but the traditional stream of revenue from cable subscriptions and the spot commercials in linear television was the backbone.

However, during this period, the popularity of the international SVoD services and the declining penetration of TV 2 in Danish households became a problem. A similar problem was the growing number of so-called cable-TV shavers that were cutting back on the number of channels in their cable subscriptions, as well as the growing number of so-called cable-TV cutters that were dropping cable television

altogether, often replacing it with Internet access to television. All of this meant that the financial importance of TV 2 Play was increasing. In short, the future of the traditional business model was uncertain, and TV 2's dependency on the traditional distribution and value chain in the television industry was slowly relaxed.

By 2022, the organisational framing of TV 2 Play's role had changed fundamentally again. The BVoD service was now cast as the imagined "front door" to all the content at TV 2, not unlike the third phase of the iPlayer's organisational history identified by Michalis (2022). The front-door metaphor was introduced in 2019 by the CEO Anne Engdal Stig Christensen, and in 2022, this was the common framing of TV 2 Play's role expressed in the production culture. This new framing was in many ways like a mimicry strategy (see D'Arma et al., 2021) for the mainstream. The BVoD service was no longer conceived as a new channel among the other channel brands, catering to a special target group, but as the platform to go to for the mainstream audience to watch TV 2's content, either linear or on-demand. The 52-week strategy was replaced by "Play 365", meaning that the BVoD service needed to publish premium content every day of the year to attract and retain the viewers. In the overall strategy for TV 2 as a company, which was launched in the spring of 2021, the role of the BVOD service was clear: "Strategy 2025 – TV 2 Play for all". The focus on the general audience instead of specific target groups was supported by the growing number of subscribers among the older audience segments.

Along these lines, the schedulers slowly shifted the focus from channel brands and target groups to content production and genres. The six niche channel brands were now to be regarded as collections of different kinds of content for a mainstream audience and for both linear and on-demand ways of watching, which were both equally important to TV 2's business model. This new framing was supported by a reorganisation of the company, in which the former commissioning editors for the channel brands and the BVoD service were reorganised in so-called genre teams and led by one head of content for all content production apart from news, sports, and Danish fiction. The task of the schedulers was to publish the content in ways that would meet the strategic goal. The head of planning for the linear channels and the BVoD service, Mette Gravesen, summed up the change in mindset like this:

The starting point for our cross-platform planning is now to ask: What are the needs of TV 2 Play in terms of content for the next year? And today we plan Play first to make sure the focus is clear. Second, we add and fit in the channel brands in this overall schedule [...]. Play has won the battle for company attention at TV 2. (Personal interview with the author, 1 June 2022)

This also meant that the aim of the schedulers and curators was to support the synergies between the two ways of watching television content, given the fact that the cable subscriptions for the seven linear channels and the revenue from spot commercials still played a major part in TV 2's financial situation. The shift to 100 per cent online distribution and non-linear watching of TV 2 content belonged to the future – or would perhaps never be achieved.

The front-door position of the BVoD service made the work of the schedulers more important, and their strategic and editorial influence grew accordingly because their knowledge of building a strong schedule across linear and on-demand use became paramount. The head of publishing, Mette Rysø Johansen, reflected on this fundamental change to the role of the schedulers in this way:

I used to think of planning and scheduling as part of the “engine room” of television, but in the current development, the planning and publishing division is a driver and owner of all the important processes and areas of development at TV 2. We drive the prioritisation of all content and the digital development. (Personal interview with the author, 1 June 2022)

The strategic content editor at TV 2 Play, Michael Viftrup, and one of the five publishing editors at TV 2 Play, Danny Schmidt, both supported this radical shift in the organisation and the effect it had on the production culture: “We are now allowed to interfere in all processes”, as Viftrup stated (personal interview with the author, 9 June 2022).

To succeed, the schedulers’ work needed to be supported by the content commissioned and produced for TV 2, and by strong collaboration between the editorial and commissioning staff and the schedulers in the whole planning and commissioning process. In many ways, schedulers needed more creative sensitivity and knowledge of the audience during the period from 2016 to 2022. This intensified demand-led organisation of the publisher-broadcaster company had an impact on the kind of content to which TV 2 gave priority.

Second: Shifts in generic scope and new scheduling practices

The gradual re-positioning of the BVoD service in the mindset of the schedulers had an impact on the generic priorities at TV 2, and elements of what could be seen as a differentiation strategy (see D’Arma et al., 2021) were implemented. Across the three studies, the important content in terms of attracting and retaining subscribers comprised television fiction, reality programming, and human-interest documentaries. The specific programmes within these genres featured a strong element of cultural proximity and were in Danish. One specific case, however, supported the growing focus on a mainstream audience instead of the young segments of the audience in the 52-week strategy: In 2019, TV 2 Play had unexpected success among the 15–35-year-olds with the serial *Sygeplejeskolen* [*The Nursing School*]. This serial was produced for the channel brand TV 2 Charlie with the target audience being the 50+ age group, but at the BVoD service, it was published in the hero board, that is, the top row of the service’s front page. In this way, the serial was made discoverable for a very different audience that would never watch TV 2 Charlie, and *The Nursing School* was an example of the problems involved in the age segmentation model that drove the 52-week strategy. Producing original drama and online-only content in Danish for an important but very small target group was not financially viable. The scheduling practices informed by audience data had to support the traditional

business model *as well as* getting more subscribers for the BVoD service. Content that could produce this synergy between the two ways of watching television and earning money was referred to as bull's-eye programmes. This practice also included a systematic use of previews of premium content, for example, the next episode in a reality game show, a week ahead of linear scheduling at the BVoD service. The ability to commission, produce, and schedule this kind of content became a key performance indicator upstream at TV 2, and supported the enhanced editorial influence of the schedulers.

These new scheduling practices supporting the synergy between the two ways of watching television were still very important in 2022, and the genres behind the key performance indicators of bull's-eye programmes were similar. However, in 2022, bull's-eye programmes contained a much broader scope of genres, including lifestyle programming, quiz and game shows, live news casts, chat shows, and sports – genres which had formerly been regarded as flow-only and lean-back television, with little future in an on-demand media culture (Lotz, 2014). This new scope of useful television genres was explained by the growing number of subscribers, particularly among the older segments of the audience, who had become eager streamers too. According to the head of publishing at TV 2 Play, Jonas Fjordside, this development shifted the content focus:

When streaming becomes mainstream, the patterns of content use are very similar to the traditional habits known from linear television at TV 2. The patterns are just moved to another platform [...]. We need to address these people with a relevant streaming service. It can no longer be a streaming service for the 15–20-year-olds. (Personal interview with author, 1 June 2022)

These older audience segments were loyal customers of BVoD, used the back catalogue a lot, and could afford the more expensive subscriptions. The new segments of streamers also meant that the linear viewing of television using the BVoD service as an access point grew, especially the use of the 24/7 news channel, TV 2 News, and the two sports channels. The difference was the much higher demand for premium content with cultural proximity in Danish.

The 365-day strategy and the BVoD service as a front door to both linear channels and on-demand viewing had an additional undermining impact on the traditional scheduling practices in three major ways. First, the need for bull's-eye programmes every day eroded the traditional seasonal planning of television. The traditional low season during the summer (the B-plan) from May to August had to be dropped because the churn rates grew during this period. Instead of planning between high and low seasons, scheduling had to distribute new offers of premium content carefully during the whole year. The premium content needed to be like tentpoles to retain subscribers, and scheduled with overlapping episodes to avoid gaps that would lead to a significant decline in subscriber numbers.

Second, traditional flow scheduling of each of the channel brands had to be sacrificed to support the needs of BVoD. An example of this new practice was that the scheduling of a very popular Danish-language drama in prime time on the main channel and in the BVoD service's hero board was *not* followed by

the scheduling of equally strong follow-up programmes to retain viewers on the main channel. Equally strong programmes were no longer scheduled to retain viewers on the niche channels TV 2 Fri and TV 2 Charlie, either. Instead, strong content was saved for another day in the week. In other words, the new scheduling practice had a content approach instead of a channel approach, aiming to comply with the 365-day strategy within the resources available at TV 2.

Third, the BVoD had the upper hand if the publishing plans needed to change, compared with 2019. In many ways, these new practices asked schedulers to go against industry lore and the almost tacit knowledge of what was regarded as good scheduling in a traditional linear television landscape, according to the head of TV 2 Play publishing, Mette Birk (Personal interview with author, 2 June 2022).

However, this more profound differentiation strategy (see D'Arma et al., 2021) across the three studies described above represented a challenge to the economy at TV 2. To comply with the 365-day strategy and the key performance indicator of scheduling bull's-eye programmes, the schedulers reduced the demand for prime time programmes on the linear main channel by moving the late news cast from 22:00 to 21:30. This restructuring of prime time was also a sign of the schedulers' growing editorial power. Nevertheless, the programmes commissioned and scheduled for this shorter prime time slot (19:30–21:30) needed to live up to the key performance indicator. This bull's-eye demand meant that by 2022, TV 2 seemed to become less risk-taking and more dependent on new seasons of already successful programmes and Danish versions of non-scripted formats with a mainstream appeal. Furthermore, elements of a mimicry strategy (see D'Arma et al., 2021) were also found in the 2022 study. The lack of funding to produce the amount of premium content needed, and the fear of losing subscribers, meant that TV 2 Play boosted the similarities with the transnational SVoD services. Access to three commercial SVoD services (SkyShowtime, Hayu, and Oii) were included. These embedded SVoD services were providing TV 2 Play with a larger catalogue of international films and television series, international reality programming, and content for children not commissioned by TV 2.

Third: Public service obligations and branding TV 2

The final focus point in this section involves showing how TV 2's identity as a public service company seemed to become a far more important part of the mindset of the schedulers' production culture. The public service obligation was not mentioned at all in the interviews or field observations in the 2016 study, but it was regarded as a point of interest in the 2019 study and as part of the explicitly argued brand identity in 2022. This development adds to the elements of a differentiation strategy (see D'Arma et al., 2021) at work in the production culture. The Danish public service regulations and TV 2's broadcasting licence both emphasise universality of access, platform neutrality, and diversity in terms of content, as well as Danish culture and language in programming. As mentioned above, this regulatory framework did not change during the period from 2016 to 2022.

The mainstream focus in “Strategy 2025 – Play for All” meant that the public service obligation became a commercial lever for use in re-formulating identity and cultural proximity of TV 2 and its long-standing relationship with Danish viewers and society at large. Even though the BVoD service was not part of TV 2’s public service obligation, the framing of it in the production culture in the 2022 study merged the BVoD service with the main channel’s obligation. The public service obligation was seen as a unique selling point in the competition with international SVoD services and purely commercial BVoD services, like ViaPlay on the Danish market. It was neither framed as a burden to the financial viability and survival of TV 2, nor as a commercial take on public service in comparison with the tax-funded PSM DR’s streaming service DRTV.

As an example, this mindset and framing of the BVoD service in the production culture was argued in the principles guiding the publishing of content on Play’s top row on the front page: the hero board. According to the head of publishing at TV 2 Play, Jonas Fjordside, strategic editor at TV 2 Play, Michael Viftrup, and publishing editor at TV 2 Play since 2014, Danny Schmidt, scheduling was now dominated by editorial principles that aimed to make the hero board work as a “super prime space” for TV 2. The first principle was that content publishing was to support synergies across platforms and support TV 2’s traditional strongholds in terms of popular content in Danish, for example, fiction, entertainment, reality, news, sports, and lifestyle programmes. The second principle intended to support diversity in terms of content and viewing habits, and a contextual sensitivity regarding current trends and issues in Danish society. Diversity in the Danish language content turned out to be commercially important to fight churn rates going up, and this scheduling practice was easily made compatible with the core values of the public service obligation. The third editorial principle was to shape a BVoD service featuring breaking news and supporting national events like political elections, sports events, and celebrations such as the royal jubilee in 2022. This focus on “liveness” is also pointed out by Lassen (2023) in her comparative analysis of the BVoD services DRTV and TV 2 Play. And finally, the fourth principle was to flag the public service brand identity across all these editorial principles (Personal interviews, 1 June 2022, 9 June 2022).

Furthermore, in the 2022 study, there was a public service framing among the schedulers of the way the BVoD service was to include – or planned to include – artificial intelligence supported “personalisation”. Personalisation made possible by the commercial subscription to the BVoD service was seen as one of three important tools to retain viewers. The four editorial principles described above were the most important of these tools, and in that sense, the public service branding came first. Automated recommendations from measuring the popularity of the content among users was the second most important tool. And user data from the activation of content by individual subscriptions was the third most important tool. This third tool supported the “continue viewing” features on the front page of the BVoD service and was used to feature recommendations from the back catalogue after viewing a programme. All in all, the focus on the mainstream audience meant that personalisation was important, but it was only one strategic tool among others at TV 2.

Transient strategies and identity branding

The changes in the role of the BVoD service in the schedulers’ production culture elaborated in the section above reveal the way in which a multi-channel and target-group approach to scheduling has been transformed into a television platform and mainstream approach over a short period. This transformation was a response to changes in the television industry, viewing habits, and competition. It did not happen because of cultural-political policies or new regulations relating to PSM companies in Denmark. Instead, the three studies provide us with insight into how the actual development and adaptation of production processes and practices unfolded in a PSM company with a successful outcome so far.

To sum up, Table 1 contains an outline of the key shifts in the role of the BVoD service in the three studies, the shifts of focus in the production culture, the new content demands, and the adaption strategies at work. Across the three studies, the mix of strategies already elaborated also includes an important content strategy that is elaborated below.

TABLE 1 Key shifts in BVoD roles, focus in the production culture, new content demands, and adaptation strategies

	Role of BVoD	Focus of the schedulers	New demands on content	Strategies in order of importance
2016	Peripheral activity Catch-up and time shifting	Linear channels and the promotional use of social media	–	1. Resistance strategy 2. Public service identity and the content strategy
2019	Attracting and retaining young audiences	Linear channels and the BVoD as a new channel Close link between TV 2 Zulu and TV 2 Play Premium content each week	Danish language television: fiction, reality, human interest documentaries	1. The 52-weeks-strategy 2. Mimicry strategy 3. Differentiation strategy 4. Public service identity and the content strategy 5. Resistance strategy
2022	A “front door” to all TV 2’s content and a platform service for the mainstream	Synergy between on-demand and linear viewing of bull’s-eye content Premium content every day Trans-programming content instead of channels	Danish language television: fiction, reality, human interest documentaries, lifestyle, quiz and game shows, news, and sports	1. The 365-strategy “Strategy 2025 – Play for all” 2. Public service identity and the content strategy 3. Differentiation strategy 4. Mimicry strategy 5. Resistance strategy

As illustrated in Table 1, the different kinds of strategies and practices found in the three studies can be viewed as variations of the phases, stages, or prototypical responses identified by Michalis (2022), Donders (2019), and D'Arma and colleagues (2021), respectively. First and foremost, TV 2 Play quickly moved from the peripheries of the organisation's publishing strategies onto centre stage. The BVoD was cast as a front door, very much like the way the BBC presented the iPlayer in the "third phase of VOD services in the UK from 2014 to 2019" (Michalis, 2022: 535).

Compared with Donders's findings, the approach was an experimental response based on a high degree of uncertainty among the schedulers about how the television industry would develop. The schedulers had the freedom to experiment, but the aim was to secure the business model and to use the BVoD service to support this aim. As pointed out by Donders as well as D'Arma and colleagues, the specific financial context and the business model to a large degree explain the strategic responses of the companies. This conclusion is supported by the findings in my production studies. The protection of the business model can be viewed as a resistance strategy to technological change and an almost tacit and conservative component in the production culture. However, the public service obligation was argued to be compatible with a commercially viable differentiation strategy in the editorially driven publishing practices and genre priorities at TV 2. Elements of a mimicry strategy could also be found. TV 2 Play was first targeted at young audiences, and later it became an aggregator and incorporated content from embedded SVoD services with an aim of building a large catalogue, retaining subscribers, and competing with international SVoD services. In this way, it was a kind of platformisation strategy that was driving the company strategy known as "Strategy 2025 – Play for All".

All in all, the findings of the production studies show an almost chaotic mix of company strategies and different responses to changes in media technology. As D'Arma and colleagues (2021) have pointed out, these responses and strategies are by no means mutually exclusive. The findings speak to the ability of the production culture to formulate and apply transient strategies, which enabled a specific course for a while. It is also debatable whether factors other than technology, the business model, and changing viewer habits were drivers of the changes in the role of the BVoD service in the production culture at TV 2.

One important additional factor that was referred to across the three studies is what I would like to term a *content strategy* guided by explicit values with which TV 2 wanted to be associated as a PSM company. In 2015, TV 2 launched an identity-branding campaign called "All that we share". This campaign went public in 2017 and still guides programme commissioning and content production at TV 2. The public part of the campaign consists of long promotional videos and short interstitials published on the linear channels and on social media. All elements of the campaign are pathos driven and argue that homogeneity – or shared experiences, feelings, and problems – is a value that unites us despite our differences (sexual, ethnic, demographic, class, etc.). The promotional video ends with a punchline: "Perhaps we have more in common than we think? TV 2: All

that we share” (TV 2 Play, 2017a, 2017b). This homogeneity contains universal emotions, for example, the courage to be different or to take on a huge responsibility, emotional ties, guilt, and forgiveness. The homogeneity is augmented by egalitarian values. All the elements in the campaign feature ordinary Danes as the main participants, and if public figures are involved, they represent the same universal emotions. Across the three studies of the production culture, this content strategy was used as a navigation tool in discussions and in publishing decisions across platforms, in close cooperation with the head of content commissioning and the commissioning editors. The chaotic mix of strategies was in many ways counterbalanced by this strong value-based understanding of the kind of content that TV 2 wanted to publish and be associated with. Furthermore, it was easy for the schedulers to merge this content strategy with the public service brand identity.

Conclusion

As pointed out in this article, the strategic responses to technological change found in the three production studies in many ways support the results of media policy research into how PSM adapts to an on-demand media culture. However, my approach also adds new aspects to how and why PSM is changing based on a detailed study of the day-to-day practices of the schedulers, who have a key strategic and creative influence on the kind of content PSM offers.

In the case of TV 2, the overall result of the different transient strategies was a platformisation and mainstreaming of the BVoD service, and a priority of cultural proximity across genres. Furthermore, the production culture was guided by the “All that we share” content strategy in a way that was seen as compatible with flagging a public service television identity. These key changes secured the position of the PSM company and its continued popularity in the small Danish audiovisual market.

TV 2’s business model runs as an undercurrent, and its interplay with public service obligations are by no means unproblematic. First, the conceptualisation of the audience in the content strategy guiding the production culture might, however, come across as culturally claustrophobic and nationally complacent. The values stressing homogeneity might also be at odds with the core public service value of sociocultural diversity. Second, the commercial funding and the BVoD service’s position as a commercial activity within the TV 2 company might fuel a risk-reduction that is stifling content experiments even for a mainstream audience. This unwillingness to take risks is at odds with core public service values like quality and innovation.

The focus on a mainstream audience and the need for bull’s-eye programming to attract and retain this kind of audience for financial and cultural-political reasons might have additional embedded problems. First, the need for bull’s-eye programmes could mean a reduced willingness to take creative risks like publishing content that might divide the viewers, or content that does not meet key performance indicators. These kinds of well-known measures for risk reduction in the

television industry could lead to a growing dependency on successful formats and new seasons of proven successful content in all genres, instead of promoting new and original content. Second, the platformisation of the BVoD service and the need for bull's-eye programmes do not seem to favour a portfolio that includes a creative sandbox element that could stimulate an experimental strategy that addresses the current unpredictability in the television industry. For a publisher-broadcaster company with public service obligations such as TV 2, an unwillingness to take risks could be a major problem regarding public service core values, jeopardising TV 2's cultural-political status in the eyes of the regulators.

Finally, there is in many ways a ticking bomb embedded in the platformisation of the BVoD service and its present success. The platformisation of TV 2 Play moves one of TV 2's commercial activities to the front of the company's portfolio. Even if the schedulers increasingly flagged the public service brand, it could be seen as a growing commercialisation of TV 2 that pushes the main channel back and puts it on par with TV 2's purely commercial activities. For a state-owned PSM company, this drive towards enhanced commercialisation might not be politically sustainable in the long run. As Donders (2021: 117) stated, some PSM companies engage in commercial activities that jeopardise their legitimacy: "It might bring in revenues, but undermines the universality, quality or trustworthiness of their offer and at the same time it harms pluralism and diversity in the rest of the market". In the Danish context, the tax-funded PSM organisation DR is currently also in the process of transforming its streaming service, DRTV, into a front-door service with a mainstream focus (Bruun & Bille, 2022). Compared with TV 2, DR's funding model excludes commercial activities. However, the mainstream focus might entail similar challenges with the core values of public service regardless of the funding model.

To investigate such questions concerning the challenges of PSM, similar productions studies of other commercially or publicly funded PSM companies and their strategies and practices would be fruitful. A continued comparative research effort into how specific PSM companies try to adapt to the emerging on-demand media culture could highlight the impact these adaptations might have on the ideal of public service media and the democratic ambitions associated with the phenomenon.

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