

## THE EVOLUTION OF VIEWERS' CONCERNS AND PERCEPTIONS OF TELEVISION CONTENT QUALITY

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### Abstract

This paper examines perceived television quality by considering the role played by viewers' concerns about television contents. These concerns are classified in two categories: pragmatic and moral. The research question is analysed empirically for Spain. Results show that pragmatic concerns are more important for the audience than moral concerns both in 2008 and 2012. Both types of factors are considered to have worsened their evolution in this period. However, general perception of TV quality in Spain has improved between 2008 and 2012. This is associated to a more positive opinion regarding national public service television, but to a more negative perception of the quality of TV channels.

Keywords: TV quality, audience satisfaction, moral concerns, pragmatic concerns

## **Introduction**

Research concerning the television industry has addressed a wide variety of issues and controversies: accountability of big media corporations, media concentration and the risks of dominant positions in the market, technological innovations, consumer behaviour, content production, advertising expenditures, leadership and talent management, legal aspects, new business models and sources of revenue, the role of public broadcasters, social effects, and more besides (Dunnet, 2010). However, few in-depth analyses of both viewers' perceptions of quality and viewers' concerns about audiovisual contents have been carried out. One of the reasons for this lack of empirical data is that some researchers think that there is a close correlation between levels of consumption and levels of audience satisfaction (Ang, 1991). On the other hand, television companies have been interested in discovering how to increase their ratings but have paid less attention to find empirical evidences about citizens' moral concerns.

Until the 1970s, most TV channels in Europe were State-owned, and their function was to supply a balanced combination of information, education and entertainment to all citizens. Thus, television was a merely public function, rather than a competition for audiences between different channels (Mc Quail, 1992). Over the last three decades, television broadcasting has been transformed by the deregulation of the audiovisual sector, which has been shaped by political, technological and legal factors. Since the beginning of the 21<sup>st</sup> century, most studies addressing the audiovisual industry have centred on the privatization of television companies, market liberalization and their influence on television programs and audiences (Thompson, 2006).

New market conditions -and more particularly the increase of competition- have led towards a growing interest in knowing audience opinions about television contents and brands. From the point of view of policy-makers, changes in legal frameworks should be aimed at increasing viewer

satisfaction. From the perspective of managers, the emergence of more competitors and substitutes in each market means a higher risk of change in consumer behaviour. Therefore, television companies are paying more attention to audiences' opinions and concerns so as to promote viewer loyalty to their channels.

This article explores viewer perceptions of television quality in Spain. It also looks into the relationship between quality and pragmatic and moral factors. The distinction between pragmatic and moral concerns comes from the results of the factorial analysis undertaken: our survey shows two different profiles' groups among the Spanish population. The first one is concerned about some circumstances that decrease the enjoyment provided by the experience of watching a television channel (we call that a pragmatic concern). The second group is worried about the dissonance between the content of television channels and their personal values (we call that a moral concern).

The paper attempts to make a theoretical contribution to the understanding of the media business from a managerial perspective by integrating the concepts of quality used in the media and the management literature. Although the analysis of quality television has a long tradition in the media studies literature, it has not benefited from the theoretical frameworks and developments in the field of quality management. In this paper we make an effort to incorporate the dimensions of quality mentioned in the quality management literature into the factors included in the definition of television quality.

The Spanish television market is similar to other European markets (European Audiovisual Observatory, 2013): it has two national public service channels (TVE 1 and La 2); two private, general-content channels aiming to be market leaders in terms of audience and advertising revenues (Telecinco and Antena 3); two other general-content channels launched by private companies in the

last years (Cuatro and La Sexta); and a growing number of local, regional and subject-based channels devised for specific geographical, demographic or special interest target groups.

Television is still the preferred medium among advertisers in Spain: in 2012 it received €1,815 million in advertising, 39% of total advertising expenditure across all media; the figure in 2010 was 43%, but after this year the percentage has decreased because the advertisers are investing more in the Internet (Infoadex, 2013). From 2000 to 2007, both Telecinco and Antena 3 were among the most profitable commercial channels in Europe, with profit margins of over 35 percent of net income. However, the advertising crisis of 2008 and the launch of new channels have damaged the prospects of the Spanish audiovisual sector as a whole.

The crisis has fostered the consolidation of the industry: in 2010 Telecinco bought Cuatro and two years later Antena 3 acquired La Sexta. In 2012, the channels owned by both Grupo Telecinco and Grupo Antena 3 attracted 87% of total advertising income in Spanish television (Infoadex, 2013). Therefore, in terms of market concentration three different periods can be identified: during the previous century, the scarcity of channels led towards an oligopolistic market; between 2000 and 2010 the competition increased and the biggest players' dominant positions disappeared; and after such year, the market became again oligopolistic, in spite of the abundance of channels, most part of them owned by two groups.

Audiences for the predominant Spanish private operators have decreased. The figures for Telecinco went from 22.3% in 2000 to 13.9% in 2012; the ratings for Antena 3 decreased from 21.4% to 12.5% in the same period. Similar trend applies to TVE 1, the leading public channel: its audience went down from 24.5% in 2000 to 12.2% in 2012 (TNS, 2013). On top of the predominant players, other smaller channels follow different content strategies: La 2, Cuatro and La Sexta have between 4 percent and 8 percent of the audience and broadcast more specialized contents to specific

target audiences; public regional channels focus on safeguarding cultural identities, but also buy popular entertainment contents via the FORTA association; subject-based channels aim to win the attention and loyalty of small niche groups; and local channels have the advantage of proximity to their audience, but fewer resources than their national and regional rivals ().

The Spanish people are now watching more television than they did a decade ago: the figure has risen from 210 minutes per person in 2000 to 228 minutes in 2008, and 246 in 2012 (TNS, 2013). A wider variety to choose from is also available. However, this need not mean that their perception of quality has improved. Our aim is to understand the correlations between the new kind of competition in the market and the evolution of viewer satisfaction with television quality, and how they relate to particular pragmatic and moral concerns.

## **Literature review**

Since the advent of television, researchers from different fields have paid attention to the effects of programming on the audience. Some studies have emphasized that television contents' effects vary according to the viewers' age, gender or level of education (Tan et al., 1997; Scharrer, 2006; Grabe et al. 2009). Other authors look into the specific consequences of the broadcasting of violent, racist, frivolous or erotic contents (Huston-Stein et al., 1981). A more negative approach suggests that viewing television programs is *per se* a damaging activity because it creates isolated and passive citizens (Gerbner & Connolly, 1978).

Some pieces of research indicate that the declining support for the political system in most democracies is the consequence of high levels of television consumption by citizens. Niemi and Hepburn (1995) point out that in America the electoral turnout is decreasing in spite of the increasing political coverage of television channels. According to McLeod, Scheufele and Moy

(1999) newspapers foster participation in political life but television news programs do not have a similar effect. Newton (1999) finds similar empirical evidences. Lipset and Schneider (1987) consider that television decreases audience's political trust. And Putnam (1995) underlines that it causes the weakening of civic engagement. However, other authors (Norris, 1996; Schoenbach & Lauf, 2002) consider that there is not a correlation between negative attitudes towards political life and watching television programs.

Most authors consider that high quality contents may generate positive effects in the audience: citizens may be able to better understand the world; they may be more open to new ideas, cultures and perspectives which would increase their respect for others; they may learn and discover new fields of interest; they may increase their sense of belonging to a community (Zaller, 2003; Karppinen, 2006). In fact, such positive influence has justified the very existence of public television in many countries (Syvertsen, 2003): public corporations have a cost for the audience (which is paid through direct or indirect taxes) but the cost-benefit ratio may be favorable for society.

Therefore, most concerns from both citizens and policy makers deal with non-desirable contents of television channels or, in other words, with lack of television quality. This topic has been the focus of some academic research (Arrese, 2004; Brundson, 1990; Buscombe, 2000; Corner, 1999; Frith, 2000, Hawkins, 1999). Three different quality attributes in media products can be identified: objective quality (as defined by professionals); subjective quality (audience satisfaction); and social quality (the fulfilment of the product's political, cultural or social goals in democratic societies). As will be explained later, these dimensions can be related, with certain limitations, to those identified in the quality management literature (see Garvin, 1987; Zeithaml et al., 1996). These limitations have their origin in the particularities of the television industry with

respect to manufacturing products and even to other services. In television production and reception are separated in time and space, which leads to an almost complete absence of personalization and interaction, which plays a very relevant role in quality service models (Ginsburgh and Weyers, 1999).

Many scholars consider that 'quality' is the defining feature of public television (Brants and De Bens, 2000; Corner, 1999; Dries and Woldt, 1996; Ishikawa, 1996; McQuail, 1992; Wieten et al., 2000). Academics tend to relate quality to news, culture and arts contents in theoretical terms, none of which has sufficient audiovisual appeal to generate mass audiences. In practice terms, this notion of quality has no significant bearing on what the vast majority of the audience is willing to watch.

Quality involves more than media producers merely creating content to satisfy their expectations and those of their peers. However, regarding professional standpoints, Born and Prosser (2001) argue in favour of attributing primary significance to judgments of quality articulated by professionals. The survey on 'Quality Assessment of Television' by Sakae Ishikawa (1996) includes, among others, the studies by Albers (1996) and Leggatt (1996b) on the views of professionals concerning programming quality in the North American and British television industries. These authors offered a systematic account of the criteria on which television professionals base their production of quality programs.

This idea of quality resembles the dimension of conformance identified in the quality literature, understood as the degree to which the characteristic of a product meet established standards (Garvin, 1987). Whereas in manufacturing these standards are defined in physical and engineering terms, in television they are set by professionals. As a consequence, a program is of quality if in its final version it does not deviate from the requirements made by the experts. Blumler



et al. (1986) had noted that American producers have trouble discussing quality in abstract terms due to their commercial background: in contrast with the European scenario, American public channels are not the benchmark of quality because they are specialized offers with very low ratings. However, the interviews carried out by Albers (1996) and Leggatt (1996b) with American and British television professionals, respectively, disclose different conclusions. Regardless of their involvement in public or commercial television, and irrespective of the genre in which they work, all were able to articulate standards of quality in ten significant areas, such as craft skills standards, resources, truthfulness, relevance, emotions, curiosity/thought, clarity of objectives, commitment, innovation and audience reaction. Such standards clearly draw on a notion of quality that may be determined independently of genre, audience or the intention of the program-maker. The interviews that Costera (2005) carried out with Dutch program-makers and managers revealed that they relied on five different 'logics', or 'vocabularies' to express quality: marketing logic and artist logic; and artisan vocabulary, teacher vocabulary and moderator vocabulary. These five modes of conceptualizing quality do not differ so much in terms of quality dimensions as such, but in meaning, use and interpretation regarding different professional views of the role of the program-maker, the role of the audience and the goal of the program. By differentiating between these repertoires of quality, Costera conceptualizes a broader range of program quality dimensions than those offered by Albers and Leggatt.

Therefore, aesthetics are relevant in the definition of quality television by professionals. This dimension was also mentioned in the work by Garvin (1987), who defined it as the reaction a product provokes on the senses. Although he stressed that it is clearly a matter of personal judgment and a reflection of individual preference, in its application to television it seems to acquire some kind of objectivity when analysed from the perspective of professionals. As mentioned before, it is

not difficult to find agreement among experts when assessing the quality of television products. An example of it the wide coincidence of opinions in different television awards.

Wober (1990) implemented a study where 3,000 viewers were asked which program genre they associated with quality. Informative programs received the highest score, followed by drama and light entertainment. However, when the same group was asked to provide a single definition of 'quality television', 27% indicated that it should be 'entertaining' and 'enjoyable', while references to 'informative' and 'educational' came in second, at only 12%. Apparently, viewers make a distinction between quality programs and quality television. Messenger (2001) arrived at a similar conclusion regarding children. The logical conclusion would seem to be that quality functions as a genre feature of serious programs rather than as a neutral standard.

Abbé-Decarroux (1994) invokes a concept of quality that relates to economic effects on demand, rather than any particular aesthetic concern. He concludes that quality variables have a strong impact of theatre demand. Some are of critical significance, including reviews, and the reputation of author, producer and cast. At this point the dimension of perceived quality as defined by Garvin (1987) fits very well. Sometimes the consumers do not have complete information or knowledge about the product or service attributes, so that reputation is critical in determining how they perceive quality.

The idea of subjective quality as audience satisfaction is clearly rooted in the SERVQUAL service quality model (Zeithaml et al., 1996). In this framework quality is understood as the closeness between expected service and perceived service. That is, the viewer considers the contents she watches are of quality when they satisfy their needs.

Dutta-Bergman (2004) explores the complementarities of consumption across different media outlets. On the other hand, Allen (2005) states that the sociological perspective can account

for the development of television news without reference to profits, markets or ratings. Majority rules and focus groups became shaping conditions of television news.

A number of attempts have been made to provide a more nuanced definition of media satisfaction from the perspective of the uses and gratifications school of thought. Palmgreen and Rayburn (1985) identified six alternative gratification/expectancy-value models to predict satisfaction with television news. Perse and Rubin (1988) examined how prior expectations and activity before, during and after exposure contribute to perceived satisfaction with favourite television soap operas. Regarding pay-per-view television, LaRose and Atkin (1988) revealed that intentions to cancel subscription cable services were more strongly predicted by satisfaction variables than those related to demographics, service cost, or other differences between markets.

Some other lines of argument endeavour to integrate different perspectives including both professional and audience criteria. Approaches to the evaluation of different aspects of broadcasting quality are extremely diverse; they can be classified according to the quality dimension they assess, the conception of quality they start from, the focus of measurement, and the method of data collection.

Finally, we face the issue of social quality, related to the fulfilment of political, cultural or social goals of television. For example, the commitment to society has also been proposed as an element of quality television (Heinderyckx, 2006). This is reflected in dealing with social issues, so that the programs cover what is significant, reflect realities and facts important for society and all social segments of society are represented. This social dimension of quality television is consistent with more advanced developments in the area of quality management that link it with business ethics. From this approach quality management is not a matter of the firm and the consumer, but must take into account the interests of the wider range of stakeholders (Fisscher and Nijhof, 2005).

A practical example of it would be the EFQM Excellence Model, which incorporates among their criteria the results for society, that is, the social responsibility of the company.

The purpose of this paper is conducting research on viewer perception of quality a step further. Unlike in the other studies outlined above, two nationwide surveys administered to Spanish television viewers were designed not to define what quality is, but at least to define what quality is not. Consequently, interviewees were presented with eight non-quality dimensions. They are connected to the different perspectives of quality considered in the service quality literature reviewed above.

Four of them are moral factors: infringement of children's timetable; violent content; erotic content; and news sensationalism. These factors are closely related to the concept of social quality, since they incorporate relevant elements of ethics. They do not refer to the gratification that the viewer obtains from television but refer to the implications television has for the whole society.

The four other dimensions may be regarded as pragmatic: excessive advertising; excessive celebrity programming; lack of cultural programming; and lack of content variety. As opposed to moral dimensions, these four factors are directly linked to the benefits the viewer receives from the experience of watching television. In addition, these pragmatic factors take into account the objective traits of quality television, since they associate it with the genres broadcasted.

The hypotheses to be tested in this paper are as follows:

H1: Pragmatic concerns are considered to be more important by the Spanish audience than moral concerns regarding TV quality perception both in 2008 and 2012.

H2: Evolution of the perception of pragmatic and moral concerns on television among the Spanish audience between 2008 and 2012 has worsened.

H3: The perception of the Spanish audience of public service television channels has improved between 2008-2012, while private channels have worsened.

## **Data**

The data used in the empirical analyses carried out in this paper was collected in April and May 2008 as well as June 2012. The target population consisted of all residents in Spain aged 14 or over (37,910,000 inhabitants). Sample selection was polietapic, stratified by region (Centre, South, North and East) and size of municipality (<5,000 inhabitants, 5,000–50,000, over 50,000 and provincial capitals). The sample size is one thousand. For a confidence level of 95%, this involves a margin of error of 3.2%. Interviews were conducted by telephone, assisted by computer (CATI). The selection of the interviewee in each home was made in accordance with gender and age intervals. Questionnaire design was made aiming to measure the relevant concepts in the theoretical stage of the research. To control for the potential effects of common method variance, several recommendations mentioned in the literature were taken into account (Podsakoff et al., 2003). For example, different response formats for the measurement of variables were used. Moreover, the items were based on widely tested and used scales. The pre-test also ensured that the items were not ambiguous and were clearly understood. In order to reduce evaluation apprehension among respondents and make them less likely to edit their responses to be more socially desirable, anonymity was fully guaranteed. Harman's one-factor test as also conducted. Given that the unrotated factor analysis of the twelve final variables used in the study resulted in six factors with Eigen values greater than one, and the fact that the first factor explained only 16% of the common variance, it may be concluded that the findings here are not significantly affected by the problem of common method variance.

## **Variables**

*Television concerns.* A set of items on a 1–5 scale was used to capture concern regarding a range of aspects related to television. Value 1 means that the aspect is of no concern; 2, of little concern; 3, of average concern; 4, of considerable concern; 5, of grave concern. As explained above, the eight aspects taken into consideration were organized by type: moral and pragmatic concerns. On the one hand, infringement of the pre-watershed schedule for children; violent contents; pornography and erotic contents; and sensationalism in news broadcasts (four moral concerns). On the other hand, excessive advertising; the lack of cultural programs; celebrity gossip programs; and the lack of content variety in the television channels' output (four pragmatic concerns). The statement of the items is a direct application of the factors considered in the formulation of the hypotheses.

The evolution of these aspects in recent years was also measured through a 1 to 5 scale, where 1 means decreased a lot, 2 decreased a little, 3 remained the same, 4 increased a little and 5 increased a lot.

*Perceived TV quality.* An ordered variable ranging in value from 1 to 5 (1 = quality is very bad; 2 = bad; 3 = average; 4 = good; 5 = very good) was used to measure viewer perceptions of TV quality.

*Test methods.* In order to empirically test the hypothesis non parametric tests are used. Mann-Whitney test is used to test differences for a given variable in two subsamples, whereas the Wilcoxon sign-ranked test is applied to test differences between variables in the same sample.

## **Results**

Table 1 shows the extent to which viewers were concerned about several aspects of TV content both in 2008 and 2012. Interviewees were asked to assess their concern on a 1-5 scale,

where 1 means no concern at all and 5 indicates a lot of concern. Table 2 displays the results of the Wilcoxon sign-ranked test in order to test the statistical significance of the differences between the magnitude in 2008 of the concerns on the factors analyzed.

INSERT TABLE 1

INSERT TABLE 2

The information from both tables indicates that in 2008 excessive advertising was the factor that generating most concern in the audience. Next a group of three factors followed. Although lack of cultural programming appears as the one of them causing the highest concern, the difference with violent content and lack of content variety is not statistically significant. The next group of factors in order of importance are excessive celebrity programming and news sensationalism, with no significant differences in their values. Finally, the two factors that caused in 2008 least concern in viewers were erotic contents and the infringement of children's timetable.

Table 3 shows the same information than Table 2 but referred to 2012. In this year also excessive advertising is the factor causing most concern among the audience. Lack of cultural programming appears again as the second most relevant factor, but with no significant differences with the third and the fourth factor: violent contents and news sensationalism. These two factors display no differences with the fifth factor in order of importance: lack of content variety. The sixth factor in importance is excessive celebrity programming, although this importance is not statistically significantly different compared to that of news sensationalism and lack of content variety. The second to last factor is erotic contents, but differently to what happened in 2008, its importance is significantly higher than the one of the last factor: the infringement of children's timetable.

INSERT TABLE 3

In order to test if the importance assigned to these concerns has varied from 2008 to 2012, in Table 4 a non-parametric test is applied (Mann-Whitney U test) that adds to the information provided in Table 1. Results indicate that no significant changes have taken place in that period for two of the factors analyzed: infringement of children's timetable and excessive advertising. Consequently, the concern they generate among viewers is similar in 2008 and 2012. Coincidentally they are the factors that generate the highest and lowest concern, respectively, among television viewers both in 2008 and 2012.

INSERT TABLE 4

On the opposite, the degree of concern caused by the six remaining factors has changed between 2008 and 2012. Concern on erotic contents and news sensationalism has significantly increased from 2008 to 2012. The same has happened to excessive celebrity programming. In addition, a greater concern in 2012 than in 2008 has emerged related to factors that could lead to a greater uniformity in television contents. For example, factors such as the lack of cultural programming and content variety have more incidence in the concerns of the viewers in 2012 compared to 2008.

In summary, our results support Hypothesis 1, since pragmatic concerns are considered more important than moral concerns by the Spanish audience both in 2008 and 2012. In both years the two most important factors are of a pragmatic nature: excessive advertising and lack of cultural programming, whereas the two least important are moral, such as erotic contents and the infringement of children's timetable. Although an increase in concerns for both kind of factors between 2008 and 2012 has taken place, it has not altered the priority of pragmatic concerns on moral concerns.



Table 5 presents information on the audience's opinion regarding the evolution of the above mentioned negative factors in the Spanish television landscape in the past five years, both in the 2008 and the 2012 application of the survey. This perception is ranked on a 1-5 scale, where 1 indicates that the presence of the factors have diminished very much and 5 that their presence has increased a lot. Table 6 presents the results of the Wilcoxon sign-ranked test in order to analyze the significance of the differences between the factors in their evolution.

INSERT TABLE 5

In 2008 viewers think that the factors that have developed on a worse manner are excessive advertising and excessive celebrity programming. Next follow violent content, erotic content and news sensationalism. In other cases, even if considered to be inadequate, negative evolution is perceived in a lesser way, such as infringement of children's schedule and lack of cultural programming. Finally, the lack of content variety is the most constant aspect in both years. All the differences are statistically significant except that between erotic content and news sensationalism.

INSERT TABLE 6

Table 7 presents the same information than Table 6 but referred to 2012. The pattern is very similar to that found for 2008, but some differences emerge. Excessive advertising and excessive advertising exchange their positions, so that the latter is the aspect considered to have had the worst recent evolution in 2012. There is also an exchange of positions between news sensationalism, violent contents and erotic contents, so that they appear in this order in 2012. The three aspects perceived to have had the best evolution remain the same and appear in the same order: infringement's of children timetable, lack of cultural programming and lack of content variety. All the differences between the factors are significant, except that between news sensationalism and violent contents.

INSERT TABLE 7

In order to test the difference on the evolution of the perception between 2008 and 2012 Mann-Whitney U tests are used (Table 8). There are three factors for which the audience perceive that their recent evolution has been basically the same in the recent past in 2008 and 2012. They are erotic content, excessive advertising and lack of content variety. For the other five aspects, significant differences between 2008 and 2012 can be highlighted. In fact, evolution in recent past in 2012 is more negative for them than it was in 2008. These results support hypothesis 2, since the perception of the recent evolution has worsened for most of the factors considered.

INSERT TABLE 8

Finally, the perception on the quality of the programming of the different television channels is analyzed. We have seen that the main concern for viewers both in 2008 and 2012 was excessive advertising. In 2010 advertising was removed from the two nationwide public channels. We study whether this fact has had an impact on the perceived quality of these channels. That is, we examine whether variation in the aspects mentioned by viewers as important have a real impact on their perceptions of the quality of the channels programming. Table 9 includes the mean values on the interviewed opinion regarding TV programming quality of the main Spanish channels. Quality is ranked on a 1-5 scale where 1 indicates very low quality and 5 means very high quality.

INSERT TABLE 9

Even though it looks like four years is not a very long term so as to produce changes on the public's perceptions, data indicates throughout the Mann-Whitney U test that very significant changes have taken place on the consideration that the Spanish audience has on the channels that conform the national TV supply.

The evolution of the Spanish attitude towards TV quality of the main channels permits to distinguish three big groups of channels. On the one hand, some of them have improved their quality image. They are basically TVE1 and La 2, the two national public service broadcasting networks. Both have improved their quality perception between 2008 and 2012. What happened with TVE1 is especially remarkable: while in 2008 it was in a medium position, in 2012 it is the most valued channel by the Spanish.

On the other hand, a second group of channels is conformed by those that generate a similar opinion regarding their quality in 2008 and 2012. They are two private national channels (Antena 3 and La Sexta) and the group of regional public service broadcasters.

Finally, those networks that have reduced their quality perception by the audience between 2008 and 2012 compose the third group. Pay TV channels, local stations and two national private channels (Cuatro and Telecinco) can be found here. Despite that they all suffer a significantly worse perception, Telecinco's case is especially dramatic. In four years, its quality perception by the Spanish audience has diminished one point, while the total variation range is four points. Telecinco is clearly the less valued channel regarding quality by TV viewers.

The last line of Table 9 indicates obtained results of quality perception by the Spanish of TV programming as a whole, not that of particular channels. Consistently with what data shows for specific networks (two of them improve, three are maintained and four obtained a worse assessment), the general TV quality in Spain is considered to have increased between 2008 and 2012. It is important to highlight that values given in this question are even below the mean given to all channels individually. This is to say, viewers are more demanding when they value TV supply as a whole than when they do so for each particular network. For instance, in 2008 no channel

receives a valuation below the general one, while in 2012 it happens only with two cases out of nine. Therefore, these results support Hypothesis 3.

## **Conclusion and discussion**

To conclude, available data show to what extent the previously stated hypothesis are confirmed or not. Firstly, this piece of research assumed that pragmatic concerns are considered to be more important by the Spanish audience than moral concerns regarding TV quality perception both in 2008 and 2012. In both years six factors generate more concern: excessive advertising, violent content, lack of cultural programming, excessive celebrity programming, lack of content variety and news sensationalism. So as to say, all pragmatic aspects plus two of the moral ones are included here. The less disturbing aspects are erotic content and specially the infringement of children's schedule. Both are moral aspects. The preliminary conclusion should be that generally speaking pragmatic concerns are more important for the audience in 2008 and 2012.

Regarding the second hypothesis, it states that evolution perception of pragmatic and moral concerns on television among the Spanish audience between 2008 and 2012 has worsened. There are three factors where the audience perceive that their recent evolution has been basically the same in both years. They are erotic content, excessive advertising and lack of content variety. For the other six aspects, some differences can be highlighted in 2008 and 2012. In addition, evolution in 2012 is more negative for them all than it was in 2008. However, differences are not equally high. Recent evolution perceived on news sensationalism in 2012 is considerably higher than in 2008. The same thing holds true with excessive celebrity programming and violent content. The distance is not that important on infringement of children's timetable and the lack of cultural programming.

The conclusion could be that generally speaking both pragmatic and moral factors are considered to have had a negative evolution, but not equally important depending on particular cases.

Finally, the third hypothesis stated that the perception of the Spanish audience of public service television channels has improved between 2008-2012, while private channels have worsened. This is particularly confirmed regarding the national public service channels (TVE1 and La 2). But regional public service broadcasters have not improved their audience perception significantly. As for the private channels, two of them obtain a worse quality perception (Telecinco and Cuatro, jointly with pay-TV platforms and local stations as a whole), but two others (Antena 3 and La Sexta) maintain a similar assessment. So that this hypothesis is partially confirmed: not all public service channels improve; not all private channels get worse. The improvement of TVE1 and La2 can be correlated with the fact that both channels stopped airing advertising in 2010. The economic crisis and a lower content investment can be identified as a possible factor to explain the reduced quality valuation for many of the private operators.

Several implications for theory development can be extracted from our results. For example, the evolution found for the factors associated to quality does not follow the patterns detected in the service quality literature. Whereas the most recent theoretical advances point to an increasing role for the ethical and social dimensions (Fisscher and Nijhof, 2005), our results show not only that they are not prevalent, but also that their importance is decreasing. This suggests the need of theoretical models that help to explain the dynamics of the concept of quality applied to television. In addition to this, more work is needed for better identifying the meaning of quality television. Our research shows that the service quality literature provides interesting insights for the study of the concept of television quality. However, a refinement and adaptation of these general models to the particularities of television is required in order to make more advancements.

Another result from our paper deserving more theoretical attention is the negative evolution of the perception of the quality of television by viewers. From the point of view of service quality models (Zeithaml et al., 1996) this involves a decrease in viewer satisfaction caused either by a real reduction in quality or higher expectations by more demanding customers. One of the key questions at this point is the analysis of how the change in the of competition structure of the television market, with the incorporation of more television channels, has led to a reduction in service quality. Theoretical models capable of making predictions compatible with this outcome should be developed.

This paper has some managerial implications. As our research has showed, there is not a close correlation between levels of consumption of television contents and levels of audience satisfaction. Today's good ratings may mean more advertising revenues but, if viewers are disappointed, that may create side effects too: bad reputation, decrease of the brand's value and a variety of troubles with providers, distributors, the government and society at large.

On top of that, the lower the satisfaction of audiences, the higher the possibilities of looking for other options delivered by competitors. Such risk of lack of loyalty from viewers has increased during last years: the launching of new television channels, fostered by technological and legal reasons at worldwide level, leads to more choice for consumers.

The media market's digital transformation has changed the "rules of the game" (Picard, 2014). Some old entry barriers have decreased their impact and are not able to protect the conquered territories. Legal barriers, distribution barriers and economies of scale are less relevant and, as a result, there are less oligopolistic media markets and firms find more difficult to protect their market shares. Today, competitive advantages depend mainly on intangible assets: the value of

the brands, the service's quality, the degree of creativity and innovation, the relationships with providers and distributors and particularly the perception of the audience.

Therefore, managers of television companies should pay attention to their audiences because their income comes from them. But they should measure and manage the viewers' level of satisfaction too, because that may become the strongest entry barrier, the most efficient answer to the threats that come from an increasing number of competitors.

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## TABLES

**Table 1. How concerned are you with the following aspects regarding TV content?**

	Total	2008	2012
Infringement of children’s timetable	3.23	3.21	3.26
Violent content	3.78	3.74	3.82
Erotic content	3.38	3.22	3.54
News sensationalism	3.52	3.49	3.75
Excessive advertising	4.34	4.34	4.35
Lack of cultural programming	3.78	3.75	3.82
Excessive celebrity programming	3.61	3.53	3.70
Lack of content variety	3.69	3.66	3.73

Mean on a 1-5 scale (nothing-much)

**Table 2. Results of the Wilcoxon sign-ranked test for the difference in the importance of the different concerns on TV in 2008. Z-value (p-value)**

	2	3	4	5	6	7	8
1.Infringement of children's timetable	-8.953 (0.000)	-0.037 (0.971)	-16.486 (0.000)	-8.995 (0.000)	-4.695 (0.000)	-7.594 (0.000)	-4.478 (0.000)
2.Violent content		-10.246 (0.000)	-10.823 (0.000)	-0.232 (0.816)	-3.189 (0.001)	-1.072 (0.284)	-4.610 (0.000)
3.Erotic content			-16.141 (0.000)	-8.690 (0.000)	-4.182 (0.000)	-6.955 (0.000)	-4.199 (0.000)
4.Excessive advertising				-11.827 (0.000)	-13.346 (0.000)	-13.414 (0.000)	-14.849 (0.000)
5.Lack of cultural programming					-3.817 (0.000)	-1.463 (0.144)	-5.316 (0.000)
6.Excessive celebrity programming						-2.524 (0.012)	-0.596 (0.551)
7.Lack of content variety							-3.948 (0.000)
8.News sensationalism							

**Table 3. Results of the Wilcoxon sign-ranked test for the difference in the importance of the different concerns on TV in 2012. Z-value (p-value)**

	2	3	4	5	6	7	8
1.Infringement of children's timetable	-9.283 (0.000)	-4.338 (0.000)	-15.963 (0.000)	-9.293 (0.000)	-6.629 (0.000)	-7.348 (0.000)	-7.521 (0.000)
2.Violent content		-5.922 (0.000)	-9.424 (0.000)	-0.056 (0.955)	-1.965 (0.049)	-1.072 (0.288)	-0.988 (0.323)
3.Erotic content			-12.768 (0.000)	-4.710 (0.000)	-2.183 (0.029)	-3.130 (0.002)	-3.359 (0.001)
4.Excessive advertising				-10.509 (0.000)	-11.346 (0.000)	-11.765 (0.000)	-10.590 (0.000)
5.Lack of cultural programming					-2.413 (0.016)	-1.856 (0.063)	-1.166 (0.244)
6.Excessive celebrity programming						-0.898 (0.369)	-1.099 (0.272)
7.Lack of content variety							-0.484 (0.629)
8.News sensationalism							

**Table 4. Results of the Mann-Whitney U test of differences in the importance of the different factors between 2008 and 2012**

	Z	p
Infringement of children's timetable	-1.625	0.104
Violent content	-2.271	0.023
Erotic content	-4.804	0.000
News sensationalism	-5.060	0.000
Excessive advertising	-1.435	0.151
Lack of cultural programming	-2.217	0.027
Excessive celebrity programming	-3.355	0.001
Lack of content variety	-2.373	0.018

Mean on a 1-5 scale (nothing-much)

**Table 5. How do you consider the evolution of these aspects in the Spanish TV channels in the past five years?**

	Total	2008	2012
Infringement of children's timetable	3.67	3.64	3.70
Violent content	4.11	4.01	4.22
Erotic content	3.90	3.92	3.88
News sensationalism	4.09	3.90	4.28
Excessive advertising	4.39	4.43	4.36
Lack of cultural programming	3.48	3.43	3.53
Excessive celebrity programming	4.49	4.36	4.63
Lack of content variety	3.24	3.26	3.23

1-5 scale (1 reduced very much-5 increased very much)



**Table 6. Results of the Wilcoxon sign-ranked test for the difference in the recent evolution of the different concerns on TV in 2008. Z-value**

**(p-value)**

	2	3	4	5	6	7	8
1. Infringement of children's timetable	-9.449 (0.000)	-6.332 (0.000)	-15.552 (0.000)	-16.028 (0.000)	-14.305 (0.000)	-7.382 (0.000)	-6.419 (0.000)
2. Violent content		-3.590 (0.000)	-11.871 (0.000)	-21.172 (0.000)	-9.657 (0.000)	-14.378 (0.000)	-3.317 (0.000)
3. Erotic content			-12.626 (0.000)	-19.605 (0.000)	-10.717 (0.000)	-11.910 (0.000)	-0.194 (0.847)
4. Excessive advertising				-22.981 (0.000)	-1.974 (0.048)	-19.962 (0.000)	-13.444 (0.000)
5. Lack of cultural programming					-22.557 (0.000)	-13.917 (0.000)	-19.988 (0.000)
6. Excessive celebrity programming						-18.571 (0.000)	-11.497 (0.000)
7. Lack of content variety							-13.322 (0.000)
8. News sensationalism							

**Table 7. Results of the Wilcoxon sign-ranked test for the difference in the recent evolution of the different concerns on TV in 2012. Z-value**

**(p-value)**

	2	3	4	5	6	7	8
1.Infringement of children's timetable	-9.804 (0.000)	-1.968 (0.049)	-10.671 (0.000)	-16.010 (0.000)	-15.021 (0.000)	-6.774 (0.000)	-10.091 (0.000)
2.Violent content		-8.776 (0.000)	-3.316 (0.001)	-22.342 (0.000)	-9.752 (0.000)	-15.854 (0.000)	-1.257 (0.209)
3.Erotic content			-9.968 (0.000)	-18.960 (0.000)	-14.321 (0.000)	-10.326 (0.000)	-7.987 (0.000)
4.Excessive advertising				-23.050 (0.000)	-6.717 (0.000)	-17.267 (0.000)	-2.353 (0.019)
5.Lack of cultural programming					-24.082 (0.000)	-14.726 (0.000)	-23.145 (0.000)
6.Excessive celebrity programming						-20.320 (0.000)	-9.282 (0.000)
7.Lack of content variety							-17.243 (0.000)
8.News sensationalism							

**Table 8. How do you consider the evolution of these aspects in the Spanish TV channels in the past five years? Results of the Mann-Whitney**

**test**

	Z	p
Infringement of children's timetable	-2.685	0.007
Violent content	-7.288	0.000
Erotic content	-0.714	0.475
News sensationalism	-10.205	0.000
Excessive advertising	-0.187	0.852
Lack of cultural programming	-3.295	0.001
Excessive celebrity programming	-8.786	0.000
Lack of content variety	-0.221	0.825

**Table 9. Quality perception of TV channels in 2008 and 2012**

	Total	2008	2012	Z	p
TVE1	3.73	3.55	3.91	-9.919	0.000
La 2	3.79	3.70	3.89	-5.316	0.000
Antena 3	3.55	3.55	3.55	-0.247	0.805
Cuatro	3.50	3.61	3.49	-2.413	0.016
Telecinco	3.51	3.45	2.57	-14.836	0.000
La Sexta	3.53	3.56	3.50	-0.693	0.488
Regional channels	3.42	3.46	3.39	-1.241	0.215
Local channels	2.94	3.09	2.80	-4.096	0.000
Pay channels	3.76	3.87	3.65	-3.901	0.000
General	3.11	3.08	3.15	-2.363	0.018

Mean on a 1-5 scale (very low-very high) and Mann-Whitney U test