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The Growth of the offer and the Perceptions of Television Content Quality

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ABSTRACT
This article examines the evolution of the attitudes of Spanish viewers to television from 2008 to 2016. This has been a period of time characterised by a substantial increase in the number of television channels. More specifically, the analysis is focused on audience satisfaction, perceptions of content quality and moral and pragmatic concerns. The data used in the empirical analysis come from three rounds of a survey conducted in 2008, 2012 and 2016. The size of the sample is 1,000 respondents for each year. The findings suggest that the attitudes to television have remained very stable in spite of the changes in the growth of the offer and technological upgrading.

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Introduction

Since 1996 the internet has changed entirely the rules of the game in the news and entertainment markets. The three main traditional delivery platforms – printed press, radio and television- have both more competitors and substitutes as well as lower barriers-to-entry. The printed press has been the most damaged medium (Oliver & Picard, 2020) whereas television channels have been able to maintain their advertising revenues (Malthouse et al., 2018).

In the last years the news about the printed news industry have been disheartening: decline in circulation figures, bankruptcy of legendary titles and massive layoffs of journalists, which was how many printed newspaper companies were able to survive during the digital revolution (Pickard, 2019; Van Der Burg & Van Den Bulck, 2017). The picture in the television market is quite different: new offers delivered by the internet have arrived later and most of them lack enough financial muscle to compete with the big broadcasters. In spite of this, we should examine whether this difference in their recent evolution between printed newspapers and television companies is due to them being very different businesses or if, by the contrary, the crisis in the TV industry will also emerge, although some years later (Park et al., 2021).

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A first difference between printed press and television industries is that while the number of printed newspapers decreased, the television industry grew in all developed countries. From the perspective of providers, both regulation and new digital technologies can explain such evolution. Only in the European Union, the number of television channels – defined by the European Audiovisual Observatory (EAO) as television stations that broadcast both audio and video to television receivers in a particular area- increased from 3,590 channels in 2008 to 5,370 in 2015 (more than 49%), excluding local channels and windows (European Audiovisual Observatory, 2015).

Digital broadcasting has boosted network capacity, enabling the broadcasting of more channels at a lower cost (Oliver, 2018). Some of the new channels are high definition versions of existing old brands, even though several HD-only channels have also been launched in the EU. Consumers have now more access to new local and specialised channels, particularly focused on children, sports and entertainment (Haugsgjerd et al., 2021).

The European audiovisual industry has experienced a transition from the initial public monopoly towards a balanced mix of public and private initiatives at the beginning of this century – official sources (Communities, 2003) indicate that in 2000 public broadcasters reached 44.6% of television audience in the EU15- to the present dominance of private channels. Most new brands are part of diversified multimedia groups, which are quoted in the stock exchange and follow pure profit logic. However, public service television still reaches 60% of European citizens every week and accounts for 20% of all television viewing. As EBU Director General indicates, "these broadcasters play an indispensable role in the functioning of democracies and contribute to the cohesion of society" (Deltenre, 2016).

Television consumption has also been increasing until recently: in 2000 European citizens watched 203 minutes of live television programmes per day (the number does not take into account recorded television, DVDs, and streaming shows). This figure was 217 minutes in 2008, 235 minutes in 2012 and 231 minutes in 2017 (European Broadcasting Union, 2018). The launching of new channels has increased choice: audiences have a higher number of options both in terms of quantity and variety of contents. In addition, high-definition channels provide better technical quality (D'heer & Courtois, 2016). In most countries, the highest levels of consumption were reached about 2015. After that year, new entertainment offers have caused a slow decline in television viewing (Richeri, 2020).

Two sets of facts are crucial to identify if television channels will follow or not a trend similar to printed newspapers: the evolution of both consumption and satisfaction. Changes in consumption show the present answer of the audience to the new offers delivered by the Internet. However, satisfaction and perception of quality metrics may be helpful in identifying future changes in consumer behaviour (Tefertiller & Sheehan, 2019).

There is not a necessary correlation between more (or less) minutes of consumption per person and higher (or lower) satisfaction. For instance, viewers may decide to watch more television programmes because other options -like going to the cinema or to a restaurant- are more expensive. In fact, during recessions, commercial channels experience a paradoxical effect: their audiences grow while their advertising income decreases (Kienzler, 2020; Maniou & Seitanidis, 2018; Picard, 2001).

Income of audiovisual companies depends on the number of viewers (or subscribers in the case of pay channels) and not on their satisfaction. Therefore, managers of television channels want to increase the perception of quality of the audience not to increase revenues in the short term but because the higher the satisfaction, the lower the "risk of escape" to more attractive channels or other kind of substitute products. Obviously, the increase in the number of competitors makes this risk even higher (Taneja et al., 2012).

Television has broken its historical linear chains, its one-way signal and its living-room constraints. As the President of EGTA (the trade association that markets the advertising space of public and private broadcasters across Europe) explains, nowadays the global media industry "is mainly a video sphere; and within this video sphere, it is the daily professional content from television stations all over the planet that we dedicate by far the biggest chunk of our screen-time to. In fact, almost any digital device is also a television screen today" (Isenbart, 2016).

This article explores perceptions of quality in the Spanish television market. Our research examines the terrestrial broadcasters, which still account for the majority of total television consumption, in spite of the growing audiences of new video streaming services (Castro & Cascajosa, 2020). We analyse both commercial and public channels: in contrast to the northern-European tradition of a "dual television system", in southern European countries public channels compete with commercial channels in order to reach the highest possible audience ratings. Therefore, the programming strategies of public and commercial channels are often quite similar.

We look into the evolution of perceived quality, satisfaction and concerns of viewers from 2008 to 2016. We are interested in concerns because this variable is a second opportunity to analyse the perceptions of quality by asking the question in an indirect way. We make a distinction between pragmatic concerns (those related to the factors which decrease the enjoyment of viewers) and moral concerns (those related to the dissonance between the contents broadcasted and the personal values of viewers). Our aim is to understand the relationship between perceptions of quality, audience satisfaction and the launching of new channels and substitutes in a context of technical upgrade of channels and screens.

Spain is a quite average European television market in various aspects, like daily consumption time (234 minutes per person in 2018) or market share reached by public channels (19%); by the contrary, market share of television from total advertising expenditure in media (38.5%) is higher than the European average, while penetration of pay channels is lower than European average: only 35.9% of Spanish households are pay TV subscribers (PWC, 2018).

Literature review

In this section we review the academic literature on attitudes to television. We pay special attention to the two attitudes most relevant both in theory and practice: satisfaction and perceived quality. More specifically, we focus on their definition, interrelationship, implications and factors determining them. This review will help to set the theoretical foundations for the development of the hypotheses that will be tested in the empirical part of the paper.

Since the advent of television, audience satisfaction has been studied – with different goals and perspectives- by researchers, policy-makers and practitioners. There is abundant literature about satisfaction since Cardozo's (1965) seminal study. But, as Giese and Cote (2000), "the lack of a consensus definition limits the contribution of consumer satisfaction research" and hinders the way to measure it. We can identify at least three basic controversies. Firstly, it is not clear if satisfaction is a process or an outcome (Yi, 1990). Secondly, some authors consider it an emotional response (Ladhari, 2009), while others emphasise the cognitive or conative nature of the response (Bolton & Drew, 1991). Finally, researchers disagree about how to refer to the final user: most used terms are consumer satisfaction (Saleem et al., 2015) and customer satisfaction (Smith et al., 1999).

The relationship between satisfaction and perceived quality has not generated consensus among researchers either. For instance, Anderson et al. (1994) consider that perceived quality is an antecedent of satisfaction. Bitner and Hubbert (1994) defend the opposite position, whereas Driver (2002) claims that there is a two-way relationship between satisfaction and quality.

Despite these different arguments, researchers coincide in pointing out that satisfaction is an affective, cognitive and conative response of varying intensity, based on an evaluation of products and other standards of comparison, expressed at the time of purchase, during consumption or afterwards, during a finite but variable amount of time (Giese & Cote, 2000).

The concept of satisfaction has been widely applied to the television market. Patwardham et al. (2011) develop a measurement scale that confirms the emotional nature of satisfaction with television consumption. Jacobs (1995) emphasises the relationship between satisfaction and previous expectations of viewers and Lu and Lo (2007) consider that satisfaction with drama series increases when there is a connection between viewers and television characters.

Berné-Manero et al. (2013, p. 153) show the causality relationship between quality, satisfaction and behaviour intentions: "A costumer's intention to repeat regarding entertainment programmes and news programmes, respectively, is explained by his perceptions of quality and satisfaction". On top of the "loyalty effect", Lu and Lo (2007) find other consequences of satisfaction: the increase in firm reputation; the likelihood that viewers watch the embedded advertisements in order not to miss the following stories; and the "audience voice": viewers are more likely to express positive word-of-mouth to others.

There is deep consensus about the consequences of reaching a high level of satisfaction: the higher the enjoyment, the higher the audience involvement and the higher the watching intention or subscribing intention, in the case of pay-channels (Hall, 2009). However, there is less agreement about how to reach such a high degree of satisfaction among TV consumers.

More recently, the literature has highlighted the importance of other attitudes to television. The article by Artero et al. (2015) proposes that the distinction between pragmatic and moral concerns can be useful in classifying the criteria applied by viewers to assess their experience of television watching. As in the case of perceived quality, these concerns display significant connections with satisfaction.

Researchers mention two groups of factors which individually and interactively have a relevant influence in attitudes to television, and more specifically on the perception of television quality. The first group comprises those elements internal to the viewer such as his motivations, expectations, preferences, values and mood. The second group of factors form the context external to the viewer: the objective quality of the content watched; the number and variety of channels available; and technological developments. The first group of factors has to do with the demand side, whereas the second is related to the offer side.

Identifying the role of these factors will provide valuable insights into how attitudes to television evolve in time. Since these two groups of elements are dynamic in nature they can help to explain adequately the changes that satisfaction with TV viewing and perceived quality might have experienced in the period considered in our empirical analysis. In this way, their study is essential to fulfil the objective of our research. Next we examine the factors related to the demand side and then we follow with the analysis of those associated to the offer.

The demand side

There are many reasons for media consumption by the audience. Classic Greeks used to say that a good tragedy generated the catharsis or purification and purgation of emotions, while comedy was intended to entertain through making mockery of every actor's mistakes and foolishness. In modern times researchers have studied, from a big variety of perspectives and methods, why citizens consume media contents and what makes them more or less satisfied with the offer received. Both quantitative and qualitative analyses have provided empirical evidences which can be applied to a given market in a given period of time. Chang and Chang (2020) explore the factors influencing the usage of over-the-top services. Other pieces of research deal with television contents because of the high level of TV consumption and the availability of reliable data (Mondragon et al., 2018; Tefertiller, 2018).

The influence of expectations on perceptions of media quality has been analysed through different lenses. The theory of uses and gratifications (UGT), based in the socio-psychological communication tradition, states that people consume media with different motivations to satisfy specific needs. Katz et al. (1973) argue that audience members are not passive consumers because they integrate the content of media in their own lives, with a high variety of purposes: knowledge, integration in the own community, entertainment or escapism from daily problems and concerns.

UGT has been interpreted and modified in recent decades (Nabi et al., 2006) and applied to new media (Whiting & Williams, 2013). For instance, self-determination theory comes to the conclusion that citizens satisfy three needs related to psychological well-being (Deci & Ryan, 1985): autonomy (willingness when doing a task), competence (a need for challenge) and relatedness (the desire to feel connected with others).

Both affective disposition theory (ADT) and reinforcement sensitivity theory (RST) indicate that audiences expect to get pleasure when they consume entertainment media. Within the ADT tradition, Raney (2004) considers that pleasure comes from the "victory" of own values: individuals expect to find some sort of poetic justice with the appropriate rewards and punishments. On the other hand, authors from the RST paradigm, like Reiss and Wiltz (2004), argue that enjoyment depends on the satisfaction of different personal needs, which are determined by three dominant factors: anxiety, impulsivity and extraversion. In other words, according to ADT and RST, each citizen offers a given amount of time in order to maximise personal enjoyment.

However, Tamborini et al. (2010, p. 759) consider that a frequent mistake of researchers who try to discover "what do people do with media" is focusing only on the hedonistic elements of enjoyment: "individuals enjoy seemingly abhorrent entertainment content, such as tragedy, suspense and horror". Such paradox may show the "limited treatment of enjoyment as serving solely hedonically rooted functional needs, implicating humans as mere pleasure seekers".

The attitudes to media consumption are not identical for all individuals and present meaningful variations within the audience. These differences have their origin in differences in values, motivations and expectations (Kim, 2018). At the same time, these elements are strongly determined by sociodemographic characteristics such as gender and age (Haridakis & Rubin, 2009). Therefore, the overall level of satisfaction and perceived quality of television in a society will be substantially affected by the demographic composition of the audience, so that changes in the latter will have an impact on the former.

Offer side

In the previous lines we have revisited the concepts of satisfaction and perceived quality of television contents from the perspective of the viewer and his defining features, but the audience perception depends strongly on the offer too. In fact, it is the interaction between the demands of the viewers and the characteristics of the offer that give as a result the attitudes of the consumer to television. The offer side is determined by both the general and specific environment and, as a consequence, subject to continuous alterations. This is especially important in a paper with a longitudinal perspective in the empirical analysis and intended to explain changes produced throughout a period of time.

As pointed above, three elements from the offer side are crucial to reach the highest audience satisfaction: content characteristics (objective quality), number of channels available (choice) and technological developments (innovation). Viewers will be more satisfied and perceive higher quality of television when this includes programmes with objective content quality, they enjoy more choice in the selection of contents and television devices are more technologically advanced.

The objective quality of television contents is generally measured by metrics which try to identify the closeness of a given audiovisual product to "perfection". When we do that concerning tangible objects -like clothes, cars, houses or phones- the benchmark is easily defined: there is a "model" or standard which produces a broad agreement among producers, consumers and experts. However, in the media sphere such a task always generates controversies.

Following the normative-analytic perspective (Kolb et al., 2012), we have studied the "Ley de la radio y television de titularidad estatal" (Public Broadcasting Service Law, 2006, amended in 2012), which is the basic piece of legislation concerning the Spanish television market. Our goal was to find some objective "quality benchmarks" for broadcasters. However, the Law is too generic. It states that the public television should "satisfy the Spanish population's needs of information, education, culture and entertainment; it should spread Spanish identity and cultural diversity; it should foster the information society; it should promote pluralism, participation and other constitutional values, while it guarantees the access of most relevant social and political groups" (art 2).

The Spanish Audiovisual Communication Law (2010) establishes the norms for private television channels. The law enumerates the rights of both the audience and the broadcasters, and establishes some rules regulating the market, particularly oriented to avoid the abuse of dominant positions. But again, the Audiovisual Communication Law does not provide specific requirements concerning the type or the quality of contents broadcasted by television channels.

Objective patterns of quality may come not only from the legal framework but also from the opinion of experts. For instance, Leggat (1996) proposes ten areas to analyse television quality: craft skills standards, resources, truthfulness, relevance, emotions, curiosity/thought, clarity of objectives, commitment, innovation and audience reaction. Leggatt's standards are not dependent of genre. However, according to Wober (1990), quality is more associated to information than to entertainment. On the other hand, Garvin (1987) emphasises the importance of aesthetics, while Abbé-Decarroux (1994) suggests that the best way to assess quality is to look into the answer of the viewers: good programmes are those which are highly appreciated by the audience.

Some of the disagreements about objective quality come from a misunderstanding concerning contents, channels and genres. In fact, quality is a comparative concept and only similar items may be compared: a channel may have more quality than other, and the same applies to a talent show or a TV movie. However, we cannot affirm that a reality show has more quality than a sports programme because they belong to different categories (Godlewski & Perse, 2010).

Most prizes about television quality award similar dimensions which usually include narrative, ethic, aesthetic and technological factors. Other frequent dimensions quoted in research papers are creativity, variety, balanced views or amount of money invested. Therefore, from the experts perspective the discussions deal about how to measure media quality or what the weight of each requirement of quality should be more than about the real meaning of television quality (Geraghty, 2003; McCabe & Akass, 2007).

As we have said above, a second key element of the audiovisual offer is the number of channels available. In this context, the popular assumption is that more choice leads to an increase in satisfaction (Webster & Wakshlag, 1983). On the one hand, more competition means more pressure from TV networks to adequate their content to the demands of viewers. In addition, choice has value per se because it produces the perception of freedom: viewers feel that they watch what they want.

Webster and Wakshlag (1983) stated that, in a context of a limited offer, program choice was more determined by scheduling than by programme content. Heeter (1985) studied the models of programme choice applied to cable television viewing and discovered that orienting search (becoming aware of alternatives to watch) and re-evaluation (reconsidering a choice) were positively correlated with channel familiarity (awareness of available cable channels) and channel repertoire (use of cable channels).

However, more channels may not lead necessarily to more choice if consumers receive "more of the same". Consistently with this argument, McQuail (1992: 142) ensures that "diversity has come to acquire the status of an end in itself for mass media", and Napoli (1997: 59) proposes a "method of assessing exposure diversity".

In this line, some authors consider that more choice may decrease the level of enjoyment. For instance, Ackerman & Gross, 2003, p. 290) discovered that "having many choices for discretionary activities can by itself lead to feelings of time pressure, time deprivation, and a perceived shortage of free time". Iyengar and Lepper (2000) and Fasolo et al. (2009) pointed out that most consumers desire to avoid situations of choice complexity. According to Benesch et al. (2010, p. 4), there is "lower life satisfaction with access to more TV channels. This finding suggests that an identifiable group of individuals experiences a self-control problem when it comes to TV viewing".

Atre (2007) discovers that, in "abundant markets", the launching of new channels does not lead to an increase in the offer of channels or genres to be chosen. Turner (2019) considers that "real diversity" has decreased in many television markets, while Livingstone (2019) speaks about the "datafication" of the audience, whereas Gray (2017, p. 81) warns about the focus of most research papers in quantitative data about consumption, which may explain why "we know embarrassingly little about audiences".

In spite of these academic contributions, standard economic theory suggests that more choice is usually better for consumers: it produces a shift of power of decision from the content provider towards the user and, as a result, it provides higher satisfaction (Balasubramanian et al., 2005; Heeter, 1985; Lin, 1993). In fact, the process of deregulation of the European audiovisual industry beginning in the early 80s has been driven both by technological innovations and by the requests of citizens.

The pay television industry provides consistent information about the perception of choice of viewers. One of the permanent reasons for paying for television quoted for subscribers is the opportunity to receive more channels (Dawi et al., 2018; Urgelles, 2017). Even in a multichannel context, with many free options, willingness to pay is linked to the decision to increase choice (Leandros & Tsourvakas, 2005). Medina et al. (2016) have measured the impact of the transition from analogue to digital technologies in the Spanish television market. They discovered that pay TV offers – single pay channels, pay per view, video on demand or any other distribution system- have increased their attractiveness, particularly among young viewers, because of the growth of the number of options. Therefore, it seems that viewer satisfaction depends on both quality and quantity of channels available.

Finally, a third relevant element from the offer side is innovation in production, distribution and reception of audiovisual contents, which may increase enjoyment and satisfaction. Polls conducted within industry – broadcasters, producers and manufacturers of TV sets- show that audiences are interested in any development which may increase the user experience, such as screen size and image and sound quality. Academic research has also investigated how the experience of TV viewing can be improved by technological innovations.

Bracken and Atkin (2004, p. 24) conducted a poll "revealing a greater sense of presence-immersion and presence-perceived realism reported by people who own television sets larger than 35-inche" in the USA television market. Gui and Stanca (2009, p. 18) discovered that "technologies connected to voluntary exposures, like the VCR and

DVR, were found to enhance viewers' satisfaction and enjoyment". And Green et al. (2004) consider that new technologies may make more real transportation experience, which provides a lens for understanding the concept of media enjoyment. The theory suggests that enjoyment can benefit from the experience of being immersed in a narrative world as well as from the consequences of that immersion.

Analysing the American audience, Bracken (2005) compared the experience of watching HDTV versus standard-definition television images. She discovered that improved image quality enriched the experience and enjoyment of the viewing experience. Other authors reach similar conclusions in different markets (García-Avilés et al., 2004; Shamir, 2007). In summary, there is a general consensus among researchers about the positive effect of technological innovations on satisfaction.

In summary, the perception of television quality by the audience is influenced substantially by aspects related to the demands and expectations of the viewers, but also by variables from the offer side such as the objective quality of the contents, the number and variety of channels available and technological developments, which play a major role in determining the satisfaction and perceptions of viewers on television. The arguments provided above deliver a solid theoretical framework from which hypotheses that guide the empirical analysis will be developed in the next section.

Hypotheses

In our effort to understand the relationship between the core variables in the study, we will take advantage of the fact that within the concentrated Spanish television market relevant changes in the last years concerning several of the three factors related to the offer examined in the previous section can be identified (Artero & Sánchez-Tabernero, 2015). Therefore, changes in the attitudes of viewers during the period could be attributed to changes in these factors. In the next lines we describe them, so that we can formulate hypotheses regarding the evolution of perceived quality and concerns about television in the period 2008–2016. Since our data refer to a single country, it is not possible to test the individual influence of these factors on the perceptions of the audience on the quality of television directly. What we are doing instead is testing it indirectly by examining whether perceptions on quality have changed or not in a period when the theoretically relevant determining factors have changed. As regards choice possibilities, the period examined is characterised by the entrance of new and more varied channels. Whereas in 2008 there were 24 free channels, the number increased to 46 in 2012 and 52 in 2016 (Kantarmedia, 2017). Spanish pay TV, which was stable from 2007 to 2013, is growing since 2014 and reached 6.64 million subscribers in 2018. This trend is the consequence of several factors: there are more content providers, like Netflix (launched in 2015) and HBO and Amazon Prime Video (both launched in 2016); more households have access to broadband internet services (43.6% in 2008; 81.2% in 2016; Instituto Nacional de Estadística, 2016); and the main telecom companies now offer new bundle packages of telephone, internet and audiovisual services (CNMC, 2018).

This has come together with an improvement in the technical quality of the devices and distribution systems used to watch television. As regards distribution, Spain experienced in 2010 the digital switchover and analogue terrestrial television was completely replaced by digital terrestrial television: in 2008 only 15.60% of the households received television by

DTT. At the same time, there has been an increase in the incidence of ADSL as distribution system for television, growing from a penetration of 3.40% in 2012 to 7% in 2016 (Kantarmedia, 2017). As far as the television sets sold are concerned, Spanish consumers buy to a greater extent high range devices, of larger sizes and more technologically advanced screens, such as 4 K instead of Full HD (Marchante, 2018). 86.1% of Spanish households had flat screens at the end of 2017, up from 19% in 2007. At the end of 2017, 94.9% of households were able to receive high definition TV channels (ONTSI, 2018).

It is difficult to determine the evolution of objective content quality in the years examined, since it is complicated to find a reliable indicator. Under the premise that some genres are in themselves of better quality, the analysis of the distribution of broadcasting time by genre could provide some hints. However, if we examine this distribution, we conclude that it remains similar during the whole period. We could just mention that cultural contents increased from 13.49% in 2008 to 16.35% in 2016 and sports from 5.9% to 8.76% (Kantarmedia, 2017). However, contests reduced their presence from 7.16% to 2.46% and fiction from 30.75% to 27.89%. With these slight modifications in mind, we cannot ensure that there has been a change in any direction in the objective quality of television contents.

The data suggest that in the period 2008–2016 there have been changes in all the aspects affecting the perceptions of quality in television with the exception of objective content quality. The evolution of these factors points to more favourable conditions for better attitudes of the audience. As a consequence, we formulate the following hypotheses:

Hypothesis 1: the quality of television content as perceived by Spanish viewers has risen in the period 2008–2016.

As highlighted in the literature review, attitudes of the audience towards television are not monolithic and encompass several dimensions (Bayo-Moriones et al., 2018). As a consequence, viewers assess television contents according to different criteria. A proposed taxonomy for these criteria distinguishes between pragmatic concerns and moral concerns, being the evidence that the former are more important than the latter among the audience (Artero et al., 2015). These concerns are personal and individual in that they are strongly influenced by the values, motivations and preferences of the viewer, so they are expected to differ within the audience.

The group of pragmatic concerns includes those aspects related more directly to the utility and gratification that the viewer receives while watching television. The clearest example is excessive advertising, since it leads to undesired interruptions in the enjoyment that the action of watching television creates for the consumer (Artero et al., 2016). On the other hand, moral concerns are linked to the assessment of television contents resulting from the application of the personal values of the viewer. That is, they are not elements negative from a utilitarian perspective, but are considered morally bad and promoting undesirable values by the viewers (Vila & Küster, 2014). Typical examples in this group would be the presence of violent and erotic contents.

We expect a positive evolution of both pragmatic and moral concerns in the period considered, so that viewers express less concerns about television contents in most recent years as compared to the past. As explained above, there is one strong argument that justifies this expectation and connect to our previous hypothesis. The increase in the offer has involved more alternatives. Therefore, it is more likely for viewers to find channels that adapt better to their preferences and values, so they can escape from those that generate concerns for them.

Hypothesis 2: moral and pragmatic concerns of Spanish audience have decreased in 2016 with respect to previous years.

The personal characteristics of the viewers are expected to influence their perceptions on the quality of television since they are connected to their values, motivations and expectations (Kim, 2018). The more demanding they are, the worse their evaluation should be. These demands are associated to demographic characteristics such as education and age. Because of their cultural background, educated viewers set higher standards and require contents more associated to the concept of quality television. In the case of older viewers, their experience and knowledge of television makes them less likely to accept contents lacking originality and value. This has been confirmed by the empirical evidence available. For example, in their study on attitudes to television advertising, Shavitt et al. (1998) indicate that in the USA younger consumers and persons with less education generally reported more favourable advertising attitudes than other segments of the population. In their study of the Spanish television market, Bayo-Moriones et al. (2015) found that the educational level attained by the viewer was negatively related to the perceived quality of the six nationwide television channels; their results for age pointed to a negative effect on the perceived quality of the four private channels, but positive of the two public ones, which broadcast more cultural and informative contents.

We expect this influence of age and education to have remained stable in the period analysed. For the relationship to change, an evolution in the implications of education and age would be needed. For example, age can be associated to different personal values for different generations and similar arguments would apply to education. Since the period considered is not so long as for these structural changes to happen, we hypothesise the effect of the two variables to be constant during the period examined. Our period of analysis is not so long as to have led to radical changes in the composition of the different groups defined by their main sociodemographic characteristics.

Hypothesis 3: the association between socio-demographic variables and perception of television quality has not changed from 2008 to 2016. In Spain, younger audiences, and less educated people continue to have a better perception of the quality of television than middle-aged and more educated viewers.

Methods

Data

Our data come from three rounds of a survey conducted by the research team in 2008, 2012 and 2016. The data collection process was identical in the three rounds. The data set is not a panel since different respondents were interviewed each year. The target population consists of all residents in Spain aged 14 or over. The selection of the sample 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 in each of the three years. This involves a margin of error of 3.2% for a confidence level of 95%. Interviews were conducted by telephone assisted by computer (CATI). The selection of the interviewees in homes was made in accordance with gender and age quotas.

In order to alleviate potential common method variance problems, several recommendations suggested in the literature were adopted in the design of the questionnaire (Podsakoff et al., 2003). For example, questions with different response formats were included. The pre-test ensured that the items were not ambiguous and were clearly understood by the respondents. 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.

Measures

Dependent variables

General attitudes to television. Several items capture attitudes and opinion about television. One of them measures whether the viewer is satisfied or not with the television he watches. This variable may take value 1 (very unsatisfied), 2 (unsatisfied), 3 (neither satisfied nor unsatisfied), 4 (satisfied), 5 (very satisfied). On the same scale the respondent informed on whether he liked or not current television in Spain (1-dislike a lot; 2-dislike; 3-neither dislike nor like; 4-like; 5-like a lot). He also assessed the quality of television in Spain (1 = quality is very poor; 2 = poor; 3 = average; 4 = good; 5 = very good). The evolution of television in the last ten years was evaluated on a 1 to 5 scale (1-worsened a lot; 2-worsened; 3-remained the same; 4-improved; 5-improved a lot). Finally, the respondent was asked about the impact the increase in the number of channels has had on the quality of television (1- has made quality decrease a lot; 2-decrease; 3-no impact; 4-increase; 5-increase a lot).

Television concerns. Several 1–5 items were used to capture concern regarding eight aspects related to television: 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. The eight aspects were: infringement of the pre-watershed schedule for children; violent contents; pornography and erotic contents; excessive advertising; the lack of cultural programmes; celebrity gossip programmes; the lack of content variety and sensationalism in news programmes.

As explained above, we use single item measures to capture attitudes and concerns about television. Although they have advantages related to parsimony and ease of administration, they are subject to strong caution given their likely disadvantages in terms of reliability and validity comparing to multi-item measures, as stated by conventional measurement wisdom in business and management research (Diamantopoulos et al., 2012). Another potential concern is related to the high correlations between some of the single-item measures for our dependent variables, which could suggest that they

Table 1. Correlation matrix of the dependent variables.

	Mean	S.d.	1	2	3	4	5	6	7	8	9	10	11	12
1.Satisfaction	3.27	1.13												
2.Liking	2.95	1.16	.63											
3.Perceived quality	3.11	1.01	.49	.61										
4.Evolution	3.13	1.34	.37	.47	.50									
5.More channels increase quality	3.32	1.14	.30	.36	.35	.42								
6.Concerns infringement children schedule	3.24	1.58	−.09	−.11	−.09	−.11	−.11							
7.Concerns violence	3.77	1.42	−.04	−.03	.01	−.03	−.07	.36						
8.Concerns erotism	3.34	1.57	.03	.04	.08	.02	−.02	.28	.53					
9.Concerns advertising	4.38	1.02	−.07	−.09	−.09	−.06	−.05	.11	.13	.09				
10.Concerns cultural programs	3.80	1.27	−.17	−.18	−.17	−.14	−.15	.25	.27	.18	.23			
11.Concerns celebrity gossip programmes	3.65	1.55	−.17	−.23	−.24	−.22	.23	.02	.02	.02	.20	.24		
12.Concerns programme variety	3.70	1.33	−.25	−.26	−.28	−.23	−.21	.23	.12	.05	.23	.31	.35	
13.Concerns sensationalism	3.71	1.41	−.17	−.21	−.25	−.18	−.16	.23	.16	.09	.21	.31	.32	.38

might be measuring the same construct. However, although empirically related, the items measure constructs conceptually different and capture different aspects of the attitudes of viewers to television.

More recently it has been proposed that single-item measures could be appropriate under some circumstances. Among these, the secondary role of the construct in the study, the unidimensional or complex nature of the construct and the diversity of the sample are mentioned (Fuchs & Diamantopoulos, 2009). In our case the first condition is not met, since attitudes and concerns are central in our study. However, the other two conditions fit our situation. Our sample is clearly heterogeneous since it is made up of respondents from the whole population and, as a result, is very varied in terms of sociodemographic characteristics. As regards the nature of attitudes, they are complex and global (perceived quality, satisfaction, etc.): this favours the use of single-item measures since they allow the respondent to consider any aspect they deem crucial, as opposed to multi-item measures where the number of facets included is fixed.

Table 1 includes the mean, standard deviation and correlation matrix of the dependent variables.

Independent variables

The year is considered in the analyses, with a variable representing the three waves of the survey. A gender binary variable is included (52.9% of the sample are women) as well as an ordinal variable for the age of the respondent. This has been used instead of a continuous variable in order to better detect nonlinearity effects. The age categories considered are younger than 25 (13.3% of the sample), between 25 and 44 (35.7%), between 45 and 64 (30.1%) and 65 or older (20.9%). Education level is captured by a variable that indicates whether the respondent has primary (28% of the sample), secondary (39.4%) or university studies (32.6%).

Testing method

In order to test our hypotheses, we will use analysis of variance (ANOVA). For testing Hypotheses 1 and 2 the groups of observations will be defined by the year, whereas for Hypothesis 3 we will group the observations by year and three sociodemographic variables (age, education and gender).

Results

Table 2 includes the mean values of the variables regarding the general assessment of television in Spain by the audience for the three moments in time studied. It also includes the results of the analysis of variance to test for differences in these variables between the three years.

As can be observed, there are very small and non-significant differences between years in most of the aspects considered. The level of satisfaction of viewers with television and how much they like it have remained almost the same during the period. The same applies to the two items related to quality. The perceived quality of television by the audience has remained at similar intermediate levels in the three temporal points during the period.

The only exception, although minor, to this general pattern of stability affects the assessment of whether or not the increase in the number of channels has improved the quality of the television offer. Our results point to the presence of statistically significant differences at the 5% level. In 2008 the audience agreed to a greater extent than in 2012 and 2016 with the statement that the larger number of channels had led to an improvement in the quality of television channels.

Therefore, our results do not support hypothesis 1, since the perception of television quality among Spanish viewers has not risen in the last years.

Table 3 shows the extent to which viewers were concerned about several aspects of television content in 2008, 2012 and 2016. As shown by the results of the analysis of variance, the intensity of these concerns for four of the eight aspects considered has varied significantly throughout the period and has remained the same for four of them. These last four factors are the infringement of the pre-watershed schedule for children, the presence of violent contents, the absence of cultural programmes and the lack of content variety in the television channels output.

Among the factors with changes in the intensity of concerns of the audience in the period analysed we can find pornography and erotic contents. Compared to the situation in 2008, viewers were more concerned about it in 2012 but equally in 2016. Regarding

Table 2. General attitudes to television in Spain by year (1 to 5 scale). ANOVA results.

	2008	2012	2016	F	% variance explained
Satisfaction with television watched	3.27	3.30	3.24	0.725	0.05%
I like current television in Spain	2.94	2.93	2.98	0.616	0.04%
The quality of television	3.08	3.15	3.09	1.554	0.11%
The evolution of television in the last ten years	3.09	3.12	3.18	1.140	0.08%
The increase in the number of channel has improved the quality of television	3.39	3.27	3.29	3.390**	0.23%

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$

Table 3. Concerns for different aspects related to television contents by year (1 to 5 scale). ANOVA results.

	2008	2012	2016	F	% variance explained
Infringement of the pre-watershed schedule for children	3.22	3.26	3.24	0.198	0.01%
Violent contents	3.75	3.83	3.72	1.509	0.10%
Eroticism and pornography	3.22	3.54	3.24	12.949***	0.89%
Excessive advertising	4.34	4.36	4.44	2.446*	0.16%
Absence of cultural programmes	3.75	3.83	3.82	0.935	0.06%
Celebrity gossip programmes	3.54	3.70	3.70	3.670**	0.25%
Lack of programme variety in channels	3.66	3.74	3.68	0.822	0.06%
Sensationalism in news programmes	3.50	3.76	3.88	18.731***	1.26%

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$

excessive advertising, concern about it remained the same in 2008 and 2012, but increased slightly in 2016. Concerns for celebrity gossip programmes increased from 2008 to 2012, but suffered no changes in 2016. Finally, there has been a steady increase throughout the period in the concern for sensationalism in news programmes.

Given the stability in the evolution of the concerns for the majority of aspects, their ranking has hardly changed in the period examined. In the top of the ranking we find excessive advertising as the factor the Spanish audience is most concerned about in 2008, 2012 and 2016. On the opposite place, the infringement of the schedule for children, eroticism and pornography have been consistently the aspects the audience is less worried about when watching television. The absence of cultural programmes and, to a lesser extent, the presence of violent contents have been during the whole period aspects situated among those that have drawn the most concerns of the audience. Whereas celebrity gossip programmes have been positioned at intermediate-low levels in the ranking, the lack of programme variety in the channels has descended consistently in importance during the period. Finally, the greatest change has been for the sensationalism of news programmes, which was only the sixth largest cause of concern in 2008, moved to the fourth position in 2012 and is now the second aspect that generates more concern, only behind the excess of advertising.

In summary, these results support hypothesis 2 only partially, since the decrease in audience concerns has only happened for one moral factor: erotism and pornography. For the rest of moral concerns and all the pragmatic concerns there have been no changes or these have moved in a positive direction.

Table 4 shows general attitudes to television by age in the three years analysed. The results show that in the majority of cases the youngest and oldest audience groups display more favourable attitudes in terms of satisfaction, liking, perceived quality, evaluation of recent evolution and impact of the number of channels on quality that middle-aged viewers. The only exception is the evolution of television in the last ten years in 2008, where no association is found.

The mean values of general attitudes to television by education are presented in Table 5. The results indicate for all the items considered that viewers with a higher educational level are less satisfied with television, like it less, have a poorer perception of its quality, show a more negative perception on its recent evolution and have a less positive opinion about the influence of the increase in the number of channels on the quality of television. These findings are applicable to the whole period studied.

Table 4. General attitudes to television by age (1 to 5 scale). ANOVA results for 2008, 2012 and 2016.

	2008						2012						2016					
	14–24	25–44	45–64	>64	F	% variance explained	14–24	25–44	45–64	>64	F	% variance explained	14–24	25–44	45–64	>64	F	% variance explained
Satisfaction with television watched	3.61	3.17	3.09	3.46	10.646***	3.14%	3.57	3.07	3.33	3.52	9.681***	2.83%	3.55	3.09	3.21	3.36	5.920***	1.77%
I like current television in Spain	3.24	2.80	2.80	3.20	10.369***	3.12%	3.28	2.66	2.98	3.11	11.593***	3.39%	3.15	2.79	3	3.16	5.851***	1.75%
The quality of television	3.32	2.93	2.98	3.34	12.522***	3.74%	3.40	2.94	3.17	3.35	9.935***	2.92%	3.17	2.86	3.13	3.33	10.069***	2.99%
The evolution of television in the last ten years	3.25	3.07	3	3.13	1.241	0.39%	3.19	2.87	3.14	3.50	8.540***	2.58%	3.37	2.86	3.25	3.46	11.622***	3.44%
The increase in the number of channel has improved the quality of television	3.70	3.37	3.28	3.37	5.628***	1.72%	3.63	3.26	3.09	3.29	5.207***	1.59%	3.65	3.23	3.27	3.29	4.966***	1.51%

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$

Table 5. General attitudes to television by education (1 to 5 scale). ANOVA results for 2008, 2012 and 2016.

	2008					2012					2016				
	Primary	Secondary	University	F	% variance explained	Primary	Secondary	University	F	% variance explained	Primary	Secondary	University	F	% variance explained
Satisfaction with television watched	3.60	3.28	2.88	34.390***	6.62%	3.57	3.32	3.07	13.814***	2.72%	3.38	3.30	3.08	5.855***	1.20%
I like current television in Spain	3.35	2.91	2.51	44.374***	8.41%	3.34	2.96	2.54	34.359***	6.53%	3.21	2.99	2.80	9.496***	1.93%
The quality of television	3.45	3.05	2.69	52.316***	9.76%	3.49	3.20	2.79	35.952***	6.83%	3.36	3.14	2.87	17.345***	3.49%
The evolution of television in the last ten years	3.32	3.06	2.87	9.154***	1.91%	3.57	3.17	2.65	32.330***	6.31%	3.50	3.28	2.87	18.428***	3.70%
The increase in the number of channel has improved the quality of television	3.50	3.44	3.21	6.563***	1.34%	3.39	3.27	3.14	2.740*	0.57%	3.39	3.33	3.17	3.554**	0.74%

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$

As regards gender, the results in Table 5 show that in the three years, as compared to men, women are more satisfied with television, like more current television in Spain and have a better perception of its quality. However, there are some changes in the association with gender for the opinion on the evolution of television and the impact of the number of channels on quality.

The results in Tables 4,5 and 6, provide wide support to Hypothesis 3, since the association between age and education and attitudes to television has remain unchanged throughout the period. More specifically, in the three moments middle-aged and more educated viewers have a more negative perception on the quality of television. The findings for gender are not so conclusive, since in some of the aspects examined there have been changes in the sign of the association.

Conclusions

Our research has examined the evolution of quality of television contents perceptions among Spanish viewers in the period 2008–2016. We cannot identify how each factor influences changes in the attitudes of the audience because it is not possible to isolate each variable: markets are live realities in permanent movement due to technological, legal, demographic, economic, cultural and social aspects.

However, our three surveys, which took place in 2008, 2012 and 2016, provide relevant information about the main factors for enjoyment and concern while watching television channels in the Spanish market. One of the clearest evidence from our study is that external factors related to the offer such as, for example, the number of channels available and technological advances play a secondary role, less relevant than expected, in explaining the evolution of perceived quality of television by the audience.

In fact, our first hypothesis has not been confirmed. We assumed that the perception of television quality among Spanish viewers would rise as a consequence of the increase and the higher variety of channels and as a result of several technological improvements like the availability of better screens and new HD offers. Our survey shows that in spite of those achievements, the perception of quality has not improved in a significant way.

The second hypothesis has been confirmed only partially. We considered that, in the last eight years, reasons for concern related to television contents would limit their impact because of two reasons: a change in the offer (an increase of choice), and a psychological factor (better mood among Spanish viewers due to the economic recovery). Such effect has happened in one aspect studied (sensationalism in news programs) while other reasons for concern remain stable.

The third hypothesis has been confirmed although with some nuances: women, younger audiences and less educated citizens are particularly positive in their evaluation of television contents. The importance of these three demographic factors persists during the period analysed, underlining the predominant (and almost exclusive) role of demand in the determination of attitudes.

Therefore, our research shows that the perception of quality has remained stable in Spain from 2008 to 2016 in a context of continuity of the programming strategies of the dominant broadcasters. This is consistent with the empirical evidence found by Lu and Lo (2007), Vorderer et al. (2004), and Meijer (2005), who show that the key aspect to change the perception of quality is the content broadcasted by television channels. Other

Table 6. General attitudes to television by gender (1 to 5 scale). ANOVA results for 2008, 2012 and 2016.

	2008				2012				2016			
	Men	Women	F	% variance explained	Men	Women	F	% variance explained	Men	Women	F	% variance explained
Satisfaction with television watched	3.20	3.34	4.165**	0.42%	3.23	3.37	3.734*	0.37%	3.14	3.33	6.378***	0.64%
I like current television in Spain	2.78	3.09	18.388***	1.86%	2.79	3.06	11.948***	1.19%	2.85	3.09	11.420***	1.14%
The quality of television	2.97	3.19	13.351***	1.36%	3.03	3.27	13.100***	1.30%	3	3.16	5.858**	0.59%
The evolution of television in the last ten years	3.17	3.01	3.563*	0.38%	3.11	3.13	0.096	0.01%	3.06	3.28	7.056***	0.71%
The increase in the number of channel has improved the quality of television	3.42	3.37	0.593	0.06%	3.23	3.30	0.802	0.08%	3.17	3.39	10.738***	1.09%

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.1$

aspects (increase of choice, technological innovations or general mood in society due to economic circumstances) may have some influence in the attitudes of the viewers but we have not been able to detect it.

In addition, audience concerns about television contents are more pragmatic than moral, and the gap between those two kind of complaints from viewers tends to increase: they are not more concerned about moral factors than in the past (with the exception of “sensationalism in news programmes”, which grows) while concerns about pragmatic factor increases (with the exception of “lack of programme variety in channels”, which remains stable).

Our research has implications both for managers of commercial channels and for policy makers. First, in a context of a big variety of offers and distribution channels, managers should focus on identifying the explicit and implicit demands of the audience in order to deliver attractive contents. As other authors have already suggested (Berné-Manero et al., 2013; Lu & Lo, 2007), the success of providers depends more on such ability than on any other cause. Moreover, according to the three rounds of our survey, the audience less satisfied with television contents are respondents aged between 25 and 64 years old, and the more educated citizens, who are also the people watching less television (ONTSI, 2018). Such information may be also relevant for managers of public broadcasting services. Our findings indicate that segmentation by demographic characteristics in the television market remains valid in the new context of more diversity, new business models and technical improvements.

In fact, a better understanding of audience tastes, concerns and demands will be crucial to avoid the fate of printed newspaper firms, which suffered a strong crisis as a consequence of the launching of digital substitutes. Traditional TV companies should compete now for the viewers’ time and the advertisers’ money with Netflix, Amazon Prime, Hulu and many other video streaming services. As our survey shows, the launching of new channels in Spain has not led to a significant improvement in the perception of television quality. Such findings coincide with Turner (2019), who considers that more quantity does not mean more diversity of television contents. It is also consistent with previous studies (Bayo-Moriones et al., 2018) which identify a lack of content differentiation among the leading Spanish channels. For this reason, we think that managers of television companies should explore several strategies to find the “uniqueness” of their channels.

Second, policy makers may wonder why the launching of more channels does not lead to more programme variety according to the Spanish audience. Such paradox can be explained by the concentration process that took place in the Spanish television market since 2004: the dominant players acquired or merged with smaller companies in a way that, as Santamaría et al. (2017: 150) indicate, two media groups have become a “compulsory window” for advertisers; therefore, they “make almost impossible the survival of independent channels”.

Birkinbine and Gómez (2020, p. 1078) argue that the two primary indices to measure media concentration -CR4 and HHI- are based on the market share of the top firms but “only serve as an adequate representation of media concentration sectors if one assumes that the top firms are competitors”. However, if dominant players are able to reach some non-legal agreements – as it happens in Spain, relaxing the rules about media concentration may lead towards less real choice for consumers.

Other authors have expressed similar concerns about the increasing media deregulation in a context of apparent growing diversity. As Baker (2006) and Noam (2016) state, media products are "public goods"; for that reason, large companies enjoy a decisive competitive advantage unless there is a legal framework to protect the smallest voices in the market. Therefore, new regulation may consider other tools to foster diversity like the use of network analysis before the approval of new mergers and acquisitions. A new role of public television may also be evaluated (Ohlsson and Sjøvaag, 2019). On top of that, the increasing concern about excessive advertising among almost all viewers may require a more effective regulation on such matter.

Our study has some limitations. Our operationalisation of audience perceptions is based on single-item measures. Single-item measures are outperformed by multi-item scales in terms of reliability and validity under most conditions (Diamantopoulos et al., 2012). Therefore, our results must be taken with some caution and call for the need to develop and apply better measures of attitudes to television. It would also be interesting to replicate the surveys in other geographical markets to discover if our findings can be extended to other situations or if, by the contrary, they depend on the specific characteristics of the Spanish television market. On top of that, new distribution systems are changing how citizens consume news and entertainment. People now watch what they want when they want in the platform they want. This shift may influence the perceptions of quality among viewers. These changes may demand new pieces of research to analyse possible correlations between viewers' preferences and audiovisual distribution systems.

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