Audience Dynamics and Market Share Transfer

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Abstract

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The concept of audience changed over the time depending on new theoretical and empirical axes: the sender approach and the receiver approach.

The sender approach represents the studies conducted by media companies as a marketing activity. Those companies are interested in the public or audience as a market that buys their products and provides benefits for the shareholders.

The receiver approach is mainly developed by public and /or academic institutions to investigate the media consumption and their effects (on short or long term) on the public. Based on audience study for Romanian TV channels we will analyse the evolution of audience figures from the sender perspective. We used data from the National Audience Study. Conclusions will be drawn by applying niches theory. This analysis can explain the mutations we see on the media market, the transfer of the audience from an old medium to a newer one.

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Keywords: Audience study; media market; TV channel; niches theory.

1. Introduction

Past research on mass media highlighted the fact people choose media products being motivated by the desire to satisfy different functions: advertisement, information, identity, social values, etc. One of the first research in this field is Herzog's (1944) who used formula *uses and gratifications* in order to explain radio audience satisfaction. In the following years, researches have been conducted to explore newspapers, television, mobile phones, electronic newsletters, etc. When a new medium is used for the same purpose as an old medium, then the new medium is seen as an alternative of the other.

In this paper we will study TV audience and what happens when there are new comers on the TV market, new TV channels that could 'damage' the established public. In these circumstances, the public could migrate towards a new TV channel, could stay with the old ones, or could split preferences. Thus, audience may choose between TV channels, according to the needs they satisfy.

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Based on audience study for Romanian TV channels we will analyze the evolution of audience figures from the sender perspective. We used data from the National Audience Study. Data are available on line at www.arma.org.ro and www.paginademedia.ro.

Conclusions will be drawn by applying niches theory. New TV channels emergence may or may not create a competition with older, more established media, because audience may choose between them by determining which one responds to their particular needs. The scientists try to explain this competition using the ecological niche theory approach.

2. Niche Theory

Niche theory is a method used by Dimmik and Rothenbuhler (1984) to explain the competition in the media environment and the consequences brought by a new medium.

According to the niche theory, the media environment could be seen as ecological spaces where the biological populations compete one against the other for living resources (food, water, territory, living conditions, etc.). According to the niche theory, the position of a medium is determined by the pattern of resource usage that is its survival or growth in a competition environment. We can consider the resource space as composed by microdimensions like gratifications, advertising, consumer time, audience numbers, and consumer spending.

We will outline the niches' indicators of coexistence, replacement or displacement of new TV channels (Ramirez & all, 2008). Dimmik defined three niche indicators:

Niche breadth (Usually, niche breadth measures how generalized or specialized a medium is perceived to be. A high score suggests generalism, while a low score indicates specialism).

Niche overlap (It quantifies the degree of competition between two populations ,assuming resources are finite).

Niche superiority (It measures which of the two media being tested is perceived to be better or more efficient at fulfilling a specific gratification).

This analysis explained the mutations we see on the media market, the transfer of the audience from an old medium to a newer one. More details of calculating these indicators can be found in Stefanescu (2011).

3. Audience research in Romania

Speaking about audience research we make distinction between commercial *surveys* like nowadays peoplemeter and the complex sociological inquiries that investigate audience under several aspects as – attitudes evaluation, motivations and public satisfaction, life styles and cultural practice.

On the Romanian market there are or were a number of audiometry companies (AGB Data Research, CSOP Tyler Nielsen SOFRES Mediametrie, TNS-AGB International, GfK, etc.) that made quantitative studies on audience, but tried also qualitative methods, like the Media departments of IMAS, CURS or IRSOP as well as academic research centers in communication studies like Center for Media Studies and New Communication Technologies (University of Bucharest) and others.

The audience's studies began with TV audience measurement that started in 1993. At the beginning, the National Council of the Audiovisual (established 1992) ordered these studies (see www.sna.ro). Until 1997 audience measurement used paper diaries filled by TV viewers from a selected cohort. Starting 1998, the measurement is done by peoplemeters. In order to provide reliable data, the measurement is controlled by a large association of media actors – The Romanian Association of Audience Measurement (www.arma.ro). The present national study of audience uses a representative panel of 1200 households to measure TV consumption and the socio-demographic profile of TV viewers.

In the last decades, the *academic research* was investigating the audience on the following axis:

Social composition of the audience

Media effects, especially on children

Cultural consumption practices

Uses and gratification approach of media use

Analysis of specific groups (e.g. children of different ages, or couples of children and parents, etc.).

4. TV channels' niches

In the period 2009-2015, four new TV stations were opened: two dedicated to the children (Disney Junior-2012 and Boomerang 2009/2015) and other two Romanian channels, one for news (Romania TV -2011) and one for entertainment (Antena Stars- 2013).

Our purpose is to watch if those four new channels got audience and what was their dynamics in audience. In other words, according to niche theory, if these new populations found resources for surviving. For mass media, the most important resource for surviving is the public, the audience.

In table 1, there are numbers representing the average daily audience of the main TV channels in Romania (public and commercial), in a series of 7 years (2009-2015).

Table 1. Average daily audience 2009-2015 (thousands)

	2009	2010	2011	2012	2013	2014	2015
Pro TV	645	667	654	758	824	678	612
Antena 1	492	449	477	558	683	557	527
Kanal D	197	235	284	352	421	312	362
Antena 3	161	196	230	312	253	293	263
Acasa	234	177	180	158	211	108	113
TVR 1	233	242	237	231	210	165	143
Prima TV	190	170	191	199	205	137	113
National TV	135	140	135	155	178	137	113
Romania TV	0	0	3	106	160	183	206
Disney	85	122	112	125	135	99	83
Realitatea TV	250	263	242	165	108	96	67
B1TV	65	57	51	114	108	108	85
ETNO	69	100	104	100	95	66	52
TVR 2	88	78	74	78	77	77	56
Cartoon Network	106	98	96	82	74	58	62
Disney Junior	0	0	0	22	68	50	50
Minimax/A+	83	77	85	80	63	39	36
Antena Stars	0	0	0	0	56	78	89
Boomerang	0	0	7	42	52	41	44
Pro Cinema	51	42	38	41	49	39	47

The table shows the two absolute audience leaders (ProTV and Antena 1). In order to get a relevant picture, we eliminated the sport channels, and the music channels. The diagram in Fig. 1 shows the surfaces of audience for every TV channel mentioned in the table 1, starting with the two leaders, on the bottom, and ending with the minor ones at the top of the picture. The actual audience trend is decreasing for all the TV channels, but still the order is kept.

As an exception, the four new TV channels try to gain resources and their audience number increased at the beginning, now they are stable.

In order to be more visible we eliminated from the diagram the two audience leaders that were not disturbed by the new entries. But, if we look attentively the niches are 'feeding' with the others' audience and narrow their surface.

With an areas diagram (Fig. 2), one could see the niches, the surfaces that the four new TV channels are spreading. There are two thin black lines for the new children's channels and two white consistent areas representing Romania TV and Antena Stars.
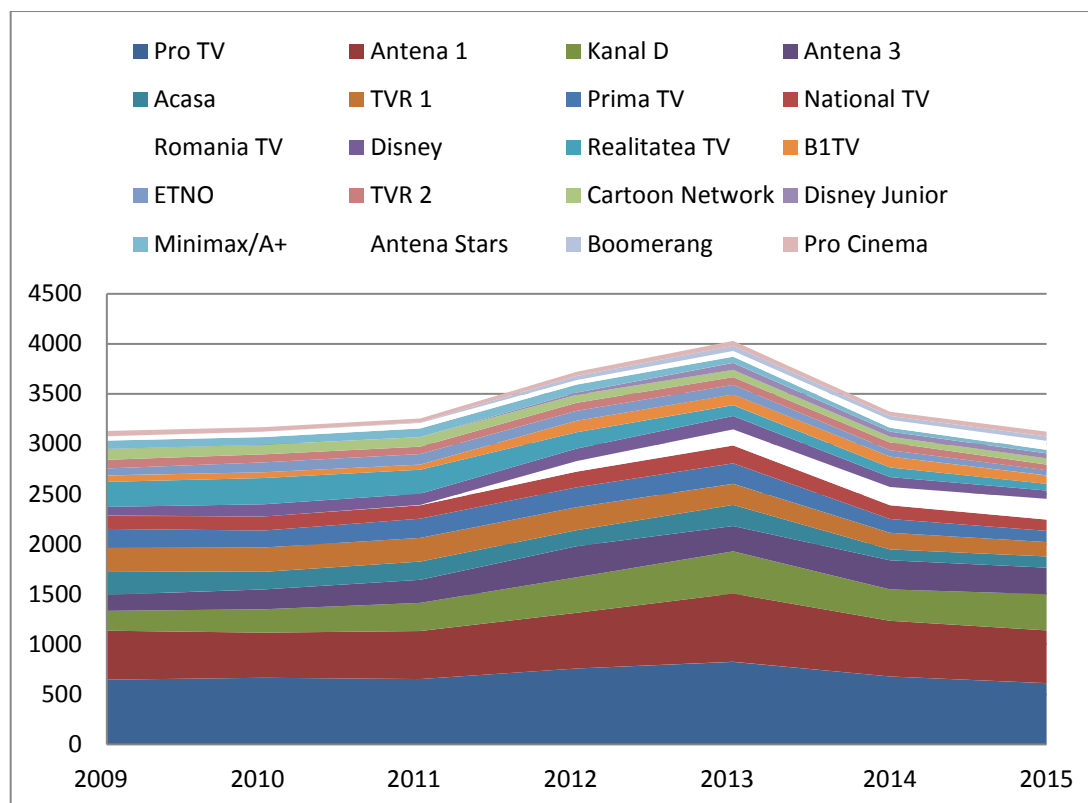
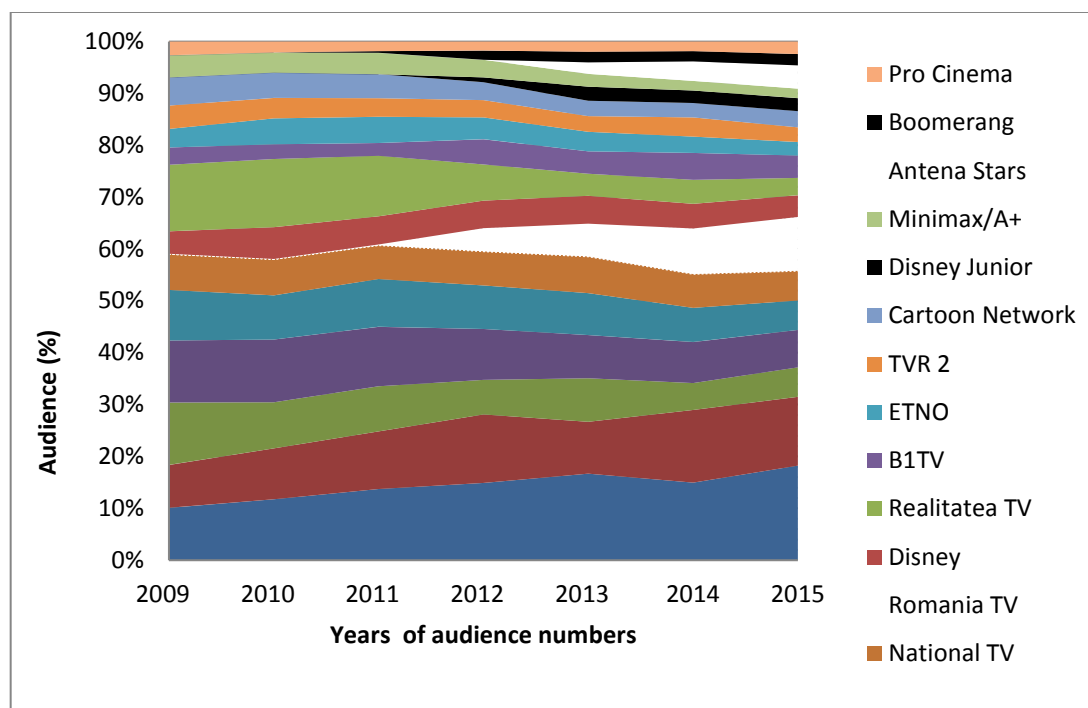**Fig. 1**. Average daily audience TV stations (2009-2015)

Fig. 2. Niches of new TV channels (In black and white colours)

5. Conclusions

Although in present days television is the main information channel in Romania, new media gains the interest of younger and educated people, despite print media. The radio has a low but stable audience and moved to digital. Dragan (2007) revealed that at family level people watch TV for

relaxation and fun, but at individual level media consumption is motivated by understanding society and information. This suggests we could orient our future research on two analysis units: family and individual.

From the perspective of niche theory, the utility of a medium to fulfil the needs of its users and to give them gratification opportunities is vital to its survival and growth in a resource space.

As we noticed in the descripted analysis above, the niches exists and our research will be targeted on the identification of consuming practices and gratifications offered by using old and/or new TV channels. So, future analysis/surveys will be dedicated to explain the factors that determine the audience dynamics.

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