

## QUALITATIVE RESEARCH ON THE NATIONAL PUBLIC TELEVISION IMPACT ON TODAY'S MARKET

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*Marketing research is the activity through which, by using methods and techniques of investigation, specification measurement, data collection are made, as well as analysis and interpretation of information marketing units required for the knowledge management environment in which it operates, opportunities are identified, alternatives, marketing actions and effects are evaluated. Marketing research has a sphere of extremely wide coverage. We could say that there is no area of business marketing which is not subject to investigation and research.*

*Keywords: qualitative research, National Public Television, audiovisual and cultural field, television broadcasting market, the nature of the TV audience*

*JEL codes: M10, M31*

Of the many variants of marketing research, television in particular uses quantitative research - via the people meter. We however, proposed to have a qualitative approach to investigating the phenomenon, the purpose being able to develop a series of proposals to improve the performance of public television's audience. Through qualitative research one records opinions, attitudes, feelings, leading to certain behaviors. Our basic idea was to surprise the phenomenon from the perspective of professionals from the audiovisual and cultural field. For this purpose, we considered research through semi-structured interviews among specialists to be extremely useful, having the intention to turn the results to a better positioning of the channel in the public broadcasting landscape of Romania, but especially for the better fulfillment of their role and functions. Specialists consider that the role of marketing research in decision making is very important, because it allows: identification of favorable opportunities and potential dangers of the environment in which the business operates, enabling the choice of alternative decision-making within the field, assessing the effectiveness of marketing decisions. Fulfilling this role, research marketing practice creates the conditions necessary for a proactive management, adapting continuously to changes in the economic, social and competitive environments.

The issue is addressed is one of special and national interest, because broadcasting in general and television in particular, determine passionate contradictory views; in this context it is useful to remember that public television - more specifically the role and importance in the local broadcasting landscape - raise special interest. The main issues that determine the controversies are: the audience, the quality of broadcasts, assuming a cultural – educational role, the TV fee, etc., which we address through this research.

Research performed fits into the qualitative research category as exploratory research, conducted in order to allow a deeper understanding of the problems addressed in this paper. The results are of qualitative nature and cannot be extrapolated to the entire population studied. Research through the semi-structured interview seeks specialists in the field of broadcasting. The steps followed in carrying out research are the classic ones, recognized by professionals - setting objectives and hypotheses, designing the research, including determining the sample survey, the place and time of data collection, methodological issues on the actual interview, developing an interview guide, presenting research results.

As far as objectives are concerned, we mention that given the research purpose stated above, we proposed a series of objectives for it, of which we consider of particular importance the following:

- identifying the main issues in the television market in Romania;
- knowledge of opinions on current trends specific to the television market in Romania, regarding the number of broadcasters, their typology, the promotion of certain values / non - values and personalities / characters through the TV channels as well as other points of view;
- shaping the role and importance of public television in today's Romanian society and the broadcasting market;
- identify the strengths and weaknesses of public versus commercial television;
- identify views on the typology of broadcasts and assuming the specific role of public television;
- values promoted by public television versus values which should be promoted;
- establish the extent to which target audiences are indicated in public television broadcasts;
- the nature of the audience which public television should focus on: quantitative, qualitative, mixed;

- advice on identifying sources of income of public television: the TV tax, budget allocations and revenue from advertising;

- opportunities to improve public television's audience performances.

Regarding the test study, we must point out that our intention was to investigate a number that varies between 30 and 50 people involved in broadcasting and in particular the television, and finally managed to talk to 36 subjects, all involved in activities undertaken in specific broadcasting institutions such as public television, certain commercial television, the National Broadcasting Council, the Ministry of Culture and Religious Affairs. The choice of subjects interviewed was done through personal relations.

Regarding **the place and time** of data collection, we note that the interviews were conducted during 15 April-13 June 2008 in Bucharest, particularly at the workplace of the people interviewed.

Regarding specific activities, the respondents engaged in particular activities in the area of marketing, marketing research, promotion, is also important to specify that some people held lower level positions, while others were in management. As regards the timeframe when people were involved in the institution as staff, they all had an experience of at least two years by the time that the study was performed.

Regarding the television broadcasting market in Romania opinions were targeted in two main directions, namely: the main problems in the television market in Romania and on issues of current trends in the television market in Romania.

Regarding the overall **television broadcasting** market in Romania, the specialists have underlined a number of distinct aspects of the phenomenon examined, the most common being the congestion of the Romanian media landscape, the lack of clear strategy and effective marketing, excessive politicization messages, lack of content, concentration of capital in real media trusts.

In relation to matters concerning the running staff (TV stars) and messages being broadcast, the opinions of specialists are very similar and particularly focused on the absence of genuinely cultural and educational programs, and the rush for the sensational and macabre, doubled by the appetite of part of the public for such information, promotion of false stars and values, promoting the plain and derisory to exceptional levels.

Regarding the **position and role of public television in today's broadcasting market**, we have outlined several aspects focused mainly on: the importance of public television in the market and use of public sources of income to support this institution, relevance to audience the nature and objectives aimed by an ideal public broadcasting service.

The **role and importance** of public television services are recognized by most of the specialists interviewed, especially on what should the institution be and less on what it is. To take in more of the aspects investigated, we divided them into two categories: the importance of public television broadcasting in the current landscape and the values that public television services should promote in today's society development context and the demands of the knowledge society.

Regarding the **importance** of public television broadcasting in the current landscape we outlined a number of issues arising in particular from the fact that it is an institution of national interest, which has assumed the role to inform all citizens fairly, as per its legal status under which public television promotes the values of domestic and European culture. The general opinion is that public television holds an important role and place in the contemporary media landscape.

The **values** that public television services should promote arising from its status and as defined by their legal organization and functioning, but also European regulations on public television services. The most representative ideas were outlined as issues around culture and cultural diversity, human rights, public education, promotion of national minorities, the family values and Christianity, a healthy business environment and proper reporting of problems with social aspects etc.

Regarding the **importance and relevance** for public television audience, specialists have varied and contradictory views, therefore they were divided - for ease of analysis - into three categories: utility of audience for public television stations, the target audience that should be related to in public television services and means by which to increase ratings.

The usefulness of audience to public television stations is a subject whom has led to different opinions, leading us to appreciate that it is extremely useful to measure the activity and orientation of the institution in terms of these indicators up to the part where it is considered unnecessary. Arguments for the first possibility are the need for public television and to periodically assess the activity compared to commercial stations in determining objectives and targeting the supply, and for the second alternative is the premise that public television still has the largest audience at national level.

Regarding the **nature of the audience** that public television services should cover, the importance of both quantitative and qualitative indicators was highlighted. In fact, the need to assess the audience both in the qualitative and quantitative aspects is important because both the quality of the public and its impact on supply are key in the idea of future development. Considering especially the quantitative audience is appreciated by specialists as halfway work and sabotage of targets set for public television, because it also has the function of public education. From a quantitative point of view, it is interesting to know first that almost all the population has access

to public programs, and on the other hand is actually the number of those who view them. From a qualitative point of view, there is the effect that a TV program has on people who watched it, how well it has informed; to what extent has it enriched the knowledge and learning of new things, useful and interesting. Specialists consider that performance through public television audience is important for orientation in terms of the offer according to public preferences, and also for the presenters and directors, for the purpose of directing the budget and formulating the messages.

In relation to options to improve public television audience, the answers are simple and straightforward: no bad taste - which involves removal of some grid shows of emotional entertainment, but also the soap item on TVR2, even if some of the public demands it, - addressing the issue of quality - good series and movies, cultural shows, sports, music, debates, well prepared presenters - and respecting the principles of journalism, especially impartiality and equidistance.

Public Television has three sources of income: TV tax, budgetary allocations and advertising revenue. We entered this issue into debate, because the survival of the institution and particularly important the role they assume in the Romanian society, cannot be achieved without financial resources, and how it's thus worthy to mention the large disputes they determine. We focused the discussion on TV tax revenues and advertising revenues, as these two are of particular interest; budgetary allocations in itself led vehement reactions, rather as an addition to the fact that public television charges the fee but also features advertising spots (it's true, with some restrictions in duration for the one hour program and without the opportunity to discontinue the program). In connection with the broadcast of advertising, opinions are divided on the one hand those who argue that only by revenue from advertising can the public television broadcasting service achieve all objectives, on the other hand, the introduction of the fee along with the advertising distorts competition in the industry. As for TV tax, there are a series of very interesting issues, primarily in the communication strategy of television to determine payment of the public is ineffective because, although the fee is very low, evasion is considerably high, and the number of subscriptions is declining.

On the ideal public television, experts consider that although it is impossible to satisfy all of the audiences' tastes, a number of features that focus public television the ideal can be identified: reliability, dynamics, attractiveness, editorial independence or exclusion of political interference, sanity in terms of spending money mainly for the purchase of TV formats from abroad and accountability.

In the end of the interview, we scored certain aspects on items discussed earlier with respondents, and asked them to add some elements that they consider relevant, but unaddressed previously. Thus specific aspects were outlined, such as the management, programs broadcasted, image and communication, social involvement.

Issues on **management and overall organization**, outlined the following ideas:

- "the organizational structure of the institution is frequently changing, and often for subjective reasons";
- "as long as management of the institution is appointed by political forces, it is practically impossible to be fully impartial and apolitical";
- "competitions to fill vacancies raise some suspicions, some managers being appointed on political criteria";
- "although there is an organizational structure that takes care of retrieving messages from the public (via e-mail, forum, phone, letters), feed-back is not always compatible";
- "some presenters and directors migrate to private stations, attracted by wages and consistent public television frequently face the problem of lack of professionals (although it is the largest supplier of professionals)";
- "although some of the activities have been outsourced, the cost cut is not very visible, sometimes it looks as though the opposite has taken place";

**Issues on the programs broadcasted:**

- "there is a paradox: some shows which have a large budget recorded small audience, and others have much smaller budgets but higher numbers";
- "the main broadcast, the 7pm news, although it is superior in terms of broadcast news, has a lower audience than news channels from competing stations";
- "TVR movie broadcasts are better than those of Pro TV and Antena 1, but not well promoted";
- "to be more daring in promoting its quality shows";
- "organize regular and qualitative research to guide its activities according to the results";

The debate generated by **communication and image**, was outlined by ideas regarding:

- „TVR brand valuation”;
- "the need for a corporate communication strategy";
- "the need for campaigns where the public is informed on its importance on the one hand, and the level very small level of this tax compared to the needs and market realities of the television services industry on the other";

In the field of **social involvement**, the main issues are:

- "it would be useful to engage in social responsibility projects";
- "to promote projects that are conceived on the universal values of humanity”.

In analyzing the problems identified in the television market in Romania, following the discussions, two main aspects became obvious: the overall problems in the market and problems regarding the programs, personnel (TV stars), and work placements.

Average consensus is that at this time, the television is overwhelming the public because of the large number of networks, but even so, when there are many investors, the major TV channels are concentrated around some "moguls" of the media.

Most often, the issues regarding the quality of broadcasts was identified, which is obviously directly linked in with the personnel policy of the television networks and their availability and ability to invest in serious projects.

Trends in the television market in Romania are rather bleak, at least in terms of quality broadcasts, and unfavorable effects on the public will occur, as long as TV is regarded as the most important means of entertainment. Specialists consider that the thirst for information and entertainment of the public on the one hand, and intentions to invest or to expand the "mogul" in the press on the other hand, will lead to the emergence of new TV channels.

Recently, on the Romanian market, big trusts in the general press and television in particular, the tendency is to reach different niches outlined, of which in particular we note the niche of information and debate politics, sports and music.

The reality is that the market has expanded enormously in recent years and will probably be extended, but this trend will lead to:

- reduction of ratings in each channel;
- control over the market by the CNA, will decrease;
- danger for television, called zapping, will increase;
- some form of cannibalization between presenters and directors will extend;
- competition, although generally beneficial, it is possible that this field would lose a quality in the race for ratings;
- emergence of pay-per-view TV channels;
- as ratings decrease against the backdrop of dilution and sharing between multiple TV channels, the financial resources obtained from advertising will also decrease;
- positions of bankruptcy or takeovers by the more powerful networks;

Nowadays, we are witnessing an interest in this market, so young, i.e. all TV stations are successful in Romania, or at least manage to survive on the market.

The role and importance of public television itself derive from its status as an institution of national interest, which should choose as first objective the interests of the citizens and meeting their needs for information, education, culture and entertainment, though not because we always like it, television is the cheapest means of entertainment for people of poor and average income. In this context, it is public television's role to contribute to the reconstruction of the Romanian society, to promote the genuine and to find ways to reach the public. Although experts consider that the efforts directed television programs to provide quality are considerably higher, compared to the commercial channels, has no ability to communicate clearly and effectively, it seems somehow in expectation, waiting for the public, but doing nothing to bring the audience to it. On the other hand, public television broadcasts feature some programs of a quality at least questionable, according to the specialists.

TV station audience is an important issue which instigates heated discussions among experts and among ordinary people. The idea of usefulness of the audience in particular when establishing editorial policy was clearly outlined, even if public television relates to these indicators, especially in order to sell more advertising space. It's also worth mentioning that television has the obligation to determine which has been the impact of its messages, and how they have enriched the capital of information and knowledge of the persons concerned. Most facts were determined as follows: the audience relevance when assessing position on the market, that in some cases it is more or less useful (e.g. for national minority issues, where the audience can be very limited), the idea of addressing issues of both quantitative and qualitative aspects of the audience. Regarding the possibilities to improve the public television audience, the views of respondents were focused on improving schedules, eliminating the bad taste of fake stars and non - values and respecting the principles of journalism concerning equidistance, editorial independence, the elimination of political interference, etc.

Also the fact that an ideal public television is impossible to achieve has come to attention, especially in the context of diversity of opinion, there are some elements that could guide public television toward this goal, of which the key ones are: reliability, professionalism, editorial, financial and managerial responsibility, authentic European and world (especially the BBC) models, etc.

Regarding the sources of income of this institution, there are contradictory opinions and concerns both regarding the TV tax and earnings from advertising. The margins were views ranged from assessing the tax as being useful for the TV institution to fulfill its mission, to remove tax as long as public broadcast stations are advertising, or surrender the option to run advertising altogether. The latter seems more plausible, even more so now that at European level this issue is being debated on the principle of unfair competition against commercial stations. In respect of the tax, a number of issues surfaced, such as the fact that there are many are evasionists, the control system is ineffective, the problem was not covered for those individual customers who have multiple TVs in the household, the institution does not communicate with the public enough on this topic.

At the end of the meetings, some elements were outlined, which although they were not part of the research, specialists have determined to be useful in this context. Of these the most significant are: the management and organization, communication and image, as well as social involvement.

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