Children's programming before and after DTT implementation in Spain

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Mercedes Medina
Universidad de Navarra
mmedina@unav.es

Mónica Herrero
Universidad de Navarra
moherrero@unav.es

Cristina Etayo
Universidad de Navarra
cetayo@unav.es

Abstract

With the privatization of television in the nineties, the television schedules were dominated by light entertainment designed to maximize audiences. As a consequence, children's programming almost disappeared from the free-to-air channels and television consumption among children decreased. That is why children programming became one of factors to pay for television. However, thanks to the DTT, the offer for children increased. The purpose of this paper is in one hand to inquire if a wider offer of channels has brought more channels for children and if they have impacted in the consumption of television by children, and secondly, if children programming still play a significant role to pay for television. The results confirm that the increase of specialized children channels produced an increment of the children television consumption.

Keywords
Children´s programming, digital television, audiences, consumption, pay for TV.

Resumen

La privatización de la televisión en los noventa trajo consigo un exceso de entretenimiento en la programación para maximizar audiencias. La programación infantil prácticamente desapareció, y con ella el consumo infantil de televisión. Los contenidos infantiles se convirtieron en una razón importante para la suscripción a la televisión de pago. Con la implantación de la TDT en 2010 aumentaron los canales especializados y también los infantiles. En este artículo estudiaremos si el aumento de canales de televisión en abierto ha significado una mayor oferta de programas infantiles y del consumo televisivo de los niños. Además, conviene analizar el impacto de este hecho en la suscripción a la televisión de pago. Los resultados muestran que ha aumentado la oferta de canales infantiles, el consumo infantil y por otro lado el poco impacto en las razones para la suscripción al pago.

Palabras clave
Programación infantil, televisión digital, audiencias, consumo televisivo, tv de pago.

1. INTRODUCTION

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After a media market monopoly by the public television that lasted more than thirty years, commercial television channels began to emerge in Spain in 1990. The Spanish television market was predominantly terrestrial since cable and satellite providers started up in the late 1990s and their position in the market was not as strong as other broadcasters mainly because they were pay television models. The early years of competition among channels saw schedules dominated for the most part by light entertainment and programs designed to maximize audiences (Medina, 1997; León, 2007). The public television channel, which also was fund by advertising until 2010, followed the same path. As a consequence of this generalized programming strategy, children’s programming almost disappeared from the schedule of the free-to-air (FTA) television channels and television consumption among children decreased (CEACCU, 2004; Bermejo, 2011).

The analogue switch-off took place in Spain in April 2010, and traditional broadcasters became free-to-air DTT providers, which meant that each one managed a multiplex capable of broadcasting between three and four channels (Alonso & Díaz, 2013). While in 2004, Spanish viewers had access to five channels; this number had risen to over thirty by 2012. Since the DTT technology context required that they could fill up to four channels, broadcasters started to develop specialized channels targeting different targets, including children.

This paper has twofold objectives: first, to inquire if a wider offer of channels has brought more channels for children and if they have impacted in the audience rating and consumption of television by children, and secondly, if children programming still play a significant role to pay for television. We will use data coming from Kantar Media (the TV audience measurement company) and data from an original survey run in 2008 and 2012 about the consumption habits of television.

2. LITERATURE REVIEW

There are different perspectives approaching children television, from the educational implications towards the responsibility of public authorities. We have chosen the economic perspective, that is to say, to try to understand the factors that configure this market and the commercial attractiveness of children television. In 1973 Melody´s book ***Children’s television: the economics of exploitation*** focused on the economic aspects of commercial children’s television and their relationship to FCC (Federal Communication Commission) public policy options. The book reflects whether programming for children should be broadcast on free-to-air or pay television channels. It is argued that advertisers targeting the children’s market remain interested in funding such programs. However, it was also predicted that the process of market specialization in providing children’s audiences for advertisers would become more intense, more precise and more persuasive. Over forty years have passed since the publication of Melody’s study and the question arises as to whether specialized channels better meet the needs of younger audiences, as well as whether they are commercially viable in the extremely competitive environment shaped by new technologies. Following this point, Pecora (1998), as well as Pereira (2010), argues forcefully that children programming evolves from the imperative of the market place instead of children needs. That is why she holds that governments ought to intervene to protect the interests of children audiences in the face of this market imperative.

Chan-Olmsted (1996) analyzed market competition in commercial children’s television in the US during the 1990s. The conclusion she came to was that children’s television comprised a highly concentrated market. The major players were Fox and Disney’s Buena Vista. Although she recommends increasing competition, she realizes that “there is no guarantee that increased competition will improve the ‘quality’ of children´s programming” (p. 38). According to her, policy makers should facilitate the accessibility of multichannel media services so as to increase the range available to the public.

Coming to the same conclusion, D’Arma and Steemers (2011) believe the children’s television programming may continue to be dominated globally by a small number of companies with the financial power to produce contents for such a narrow market. They analyze how large companies in terms of ratings and profitability (Disney, the Cartoon Network and Nickelodeon) invest in locally produced contents in Europe. They show that these US transnationals are likely to adapt their offerings in response to different local circumstances. However, they note that the income generated through advertising, subscription and ancillary revenues such as consumer products is not sufficiently large to justify the higher costs associated with the pursuit of a localization strategy.

Taking into account the technical change in the market and the ordinary life, Pecora (2007) outlines how digital technology in the new millennium has brought dramatic changes in the landscape of children’s television. The competition now is not only among the big players but also with other technologies such as videogames, computers, interactive technology and instant messaging. She points out that the amount of research in this field has mushroomed since 2000: there were 74 studies per year between 2000 and 2002, as compared with nine in 1955 (p. 6).

Some years later, Steemers (2011) published a chapter on how traditional television broadcasters for preschoolers are extending their brands towards multiplatform ecosystems in the new digital scenario. She also questions whether “traditional broadcast players are likely to remain dominant in the marketplace on the strength of their marketing expertise, greater brand awareness, and larger resources” (Steemers, 2011: 159). Based on interviews and industry analysis, she points out that smaller producers, like everybody else, are anxiously searching for new financial models on the Web, but the problem for such companies is that “low revenues also mean low production budgets for online contents” (Steemers, 2011: 171).

Bermejo’s contribution (2011) is especially relevant in relation to the Spanish market, dealing with children’s television consumption before the DTT switchover. Before 2010, children tended to watch programming for elder people; after the switchover, they began to favor specialized channels aimed at children. Bermejo concludes that children’s programming before the emergence of audience-specific channels was not economically viable, as the audience of children amounted to only 1% of the total share. From a pedagogical perspective, some scholars have also noted that prior to the DTT transition most children in Spain watched contents addressed to adults because there were hardly any programs produced specifically for children (Vázquez, 2011; Pérez & Núñez, 2006). Feijóo and García (2014) studied the audience of the children programming in the regional public television channels. They conclude that though some of these companies have invested in production of programs for children; these programs are not the most watched by children in the regional channels. After studying the trends of the children programming in Latin America, Labrador and Benavides (2014) conclude that producers of children programming should focus on multimedia contents.

Following Gunter (2010), in this paper we would like to prove if children are still a reason for subscribing to multichannel packages. According to him, pay-TV has always offered children’s programming as part of its family-oriented range, and this is considered by the industry one of the reasons why people subscribe to pay-TV (Demoscopia, 2001). Alcolea (2003) agrees that apart from soccer and movies, children and youth programs are the main stay of pay television. However, Lee (2010) concludes that children programming is not the only driving reason to pay for television, but to expand the channel repertoire, in families with children.

Children television does not only exist because of public service principles, but due to commercial interests. After the brief review of the literature related to the market, we can define some trends of the market of children television programming. It is a very specialized and competitive market interesting just for a few advertisers. As its target is so narrow, it is a highly concentrated market with very few global players and very limited local producers. However, thanks to the digital technology, a new range of possibilities for children’s services and contents appears and there could be new producers and competition could be stronger.

The present paper will focus on the impact of DTT in the children television consumption in Spain between 2008 and 2012, from the free to air offering and from the pay television model.

3. OBJECTIVES AND METHODOLOGY

In light of these changes, the purpose of this paper is to inquire if the availability of more channels contributes to a wider and significant offer, and therefore, if children programming still plays a significant role in the willingness to pay for contents in the context of a wider free-to-air offer. The research hypothesis can be formulated as follows:

H1: If there are more DTT channels addressed to children, children consumption and audience increased after 2010, and the trend since the television privatization could be changed..

H2: If the number of children channels has increased, the willingness to pay for children programming decreased and pay television operators have to think a different strategy than before to survive.

So, we examine the evolution of the supply of channels targeting children and the evolution of children’s television consumption in Spain in recent years. To do so, we will use data coming from Kantar Media (the TV audience measurement company). Secondly, we analyze data from an original survey, to try to see in particular whether children’s programs are still a key factor in willingness to pay for contents.

The survey was conducted in 2008 and 2012 and financed by the Government of Spain. The target population consisted of all the residents in Spain aged 14 or more (40,606,471 individuals). Sampling was poly-etapic, stratified by autonomous region and size of municipality. The selection of the interviewee in each home was made using gender and age quotas. The final sample size was 1,000 interviewed. For a confidence level of 95.5% this means a margin of error of 3.1%. Interviews were conducted through CATI (computed aided telephone interview). The average length of the interviews was 15 minutes. The response rate was 18.40%. Most of the questions were focused on how new television channels had changed consumption and satisfaction of the public with the new television offering. We included too some questions about the willingness to pay for television contents and the main reasons to do so.

4. ANALYSIS OF RESULTS

4.1. Children audience and consumption

This section describes first children's channels before and after the digital switchover in order to indetify the main players in the Spanish market, and secondly, time consumption and audience of children programming.

The private television law of 1988 allowed the management of the public service of television to three licence holder companies. As a consequence of this legal regulation, there were five channels of national scope in the first years of the 1990's: two state-owned channels (*TVE1* and *TVE2*), two commercial ones (*Antena 3* and *Telecinco*) and a pay television channel, *Canal Plus*. In that context of recent competition, the only channel that offered children's programming was the public service broadcaster, and since the 1990s, the range on offer decreased not being considered as competitive in those first years (Quintana, 2005; López, 2005)). Some years later, one of the private companies, Antena 3, launched Club Megatrix, a container program on weekend mornings that lasted from 1995 until 2013. *Club Disney*, the Spanish version of the program *Disney Club*, was broadcast by TVE from 1990 to 1998 and from 1998 to 2003, by the private channel Telecinco and then by TVE again until it was cancelled as a program in 2007.

In 2000, the Government renewed the private television licence to *Antena 3*, *Telecinco* and *Canal Plus*. This renewal imposed them the obligation to broadcast by means of digital technology within less than two years. They were also granted with the exploitation of a program within a certain multiple channel, therefore increasing their number of channels (Arrese & Herrero, 2005). Furthermore, the Government approved months later a new measure in order to promote digital terrestrial television: to award two licences for the exploitation of the public service of digital terrestrial television, by means of a free broadcast mode. For that reason, it could be stated that the Government grants two more private television-broadcasting channels, which will broadcast directly with digital technology. The adjudicated channels were *Net TV* and *Veo TV,* before the digitalization of the existing channels and the multiplication of channels thanks to the multiplex.

In the middle nineties, before the digital terrestrial channels started, the children's programming was mainly a specialized option offered by satellite and pay-tv. The biggest channels were Disney Channel, Cartoon Network,Fox Kids (known as Jetix since 2005) and *Clan TVE*. In 2009, the contents of Fox Kids were transferred to Disney and the brand disappeared. In a second position and some years later were in a pay basis Nickelodeon, Boomerang, *Paramount Comedy, Playhouse Disney and Toon Disney,*and the free channel*Neox belonging to the Group Antena 3 for DTT(Gómez, 2007).*

As in other countries, the children offering was dominated by US companies, Disney Channel was launched in Spain as a pay-tv option in 1998; and became a free-to-air DTT channel offered by the multiplex Vocento group in 2008 (D´Arma & Steemers, 2012). This change enabled a significant expansion in its audience rating. The other Disney options remained pay-per-view channels; Playhouse Disney (now known as Disney Junior), targeting children between the ages of two and ten; Toon Disney, targeting children between the ages of two and eleven; and Disney Channel +1, which screens the Disney contents in a schedule running one hour later. Catoon Network and Fox Kids were a pay option, that is why their audiences were as high as the other channels.

The range of children's channels made in Spain and available free to-air increased from 2004 onwards due to the increasing number of channels. RTVE launched Clan TV free-to-air in 2005, broadcast on the same frequency as the channel celebrating the fiftieth anniversary of the public service corporation. In 2007 it became the first free-to-air channel dedicated to children's programming in Spain.

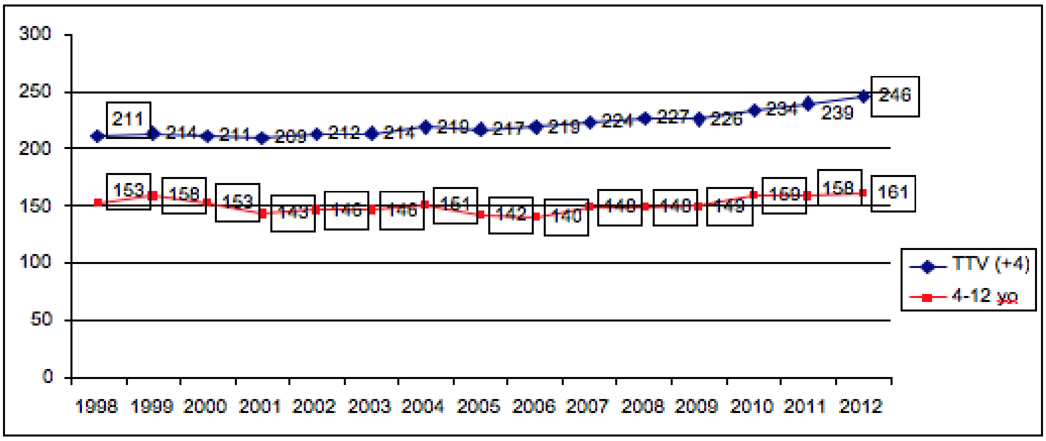
Antena 3 launched Neox TV in 2005, initially targeting children between the ages of seven and twelve, a target audience which was extended to all those under the age of twenty-five in 2010. That is why it is any more considered as a children channel.

In 2010, Mediaset España began to broadcast Boing, one of Time Warner's channels for children. Although the offer increased, it may be taken into account that those channels were digital terrestrial channels, and most households did not have digital decoders yet, so penetration was still very low until the switch-off took place.

Currently, following DTT implementation, the generalist television channels do not offer any programs addressed to children. In summary, the current free-to-air channels for children are Disney Channel (under the multiplex owned by *Net TV*), Clan TV (owned by RTVE) and Boing (owned by Mediaset) and every household can enjoy them.

However, before the digital switchover, in the years running up to the analogue switch-off, market analysts were concerned about the decline in television consumption among children and other young viewers (Corporación Multimedia, 2010). Graph 1 shows how children's television consumption fell down between 1998 were the average minute consumption was 153 and 2001 were it was 143 minutes, while television consumption in general began to rise from 2001 onwards. The main reasons for this decline are related to the lack of attractive television contents and the migration of young consumers to videogames and other online services. Since 2007 the latter increase has been slight, with occasional falls. The time spent on television consumption by children only began to increase from 2010 onwards. Since 2004, Internet use among this age-group has doubled, rising from a daily access rate of 32.5% to 62.9% in 2010 (Portilla, 2011).

Graph 1. Average TV consumption in Spain (minutes)



Source: Kantar media

Hence, such figures show that consumption by children started to increase since 2008, when the specialized channels addressed to children appeared. However, time consumption of general television decreased before 2008, the audience of children channels increased, especially since 2010. The following Table presents the average audience ratings for specialized children's channels in Spain.

Table 1. Average audience share

	Jetix	Neox TV	Disney Channel	Clan TV	Boing
2004			1,10%		
2005	1,4%	0,05%	1,40%		
2006	1,4%	0,10%	1,90%	0,30%	
2007	1,8%	0,20%	1,60%	0,30%	
2008	1,6%	0,60%	1,50%	0,70%	
2009		1,20%	1,40%	1,40%	
2010		2,20%	2,10%	3,20%	0,20%
2011			1,70%	3,20%	1,10%
2012			1,60%	2,50%	1,70%

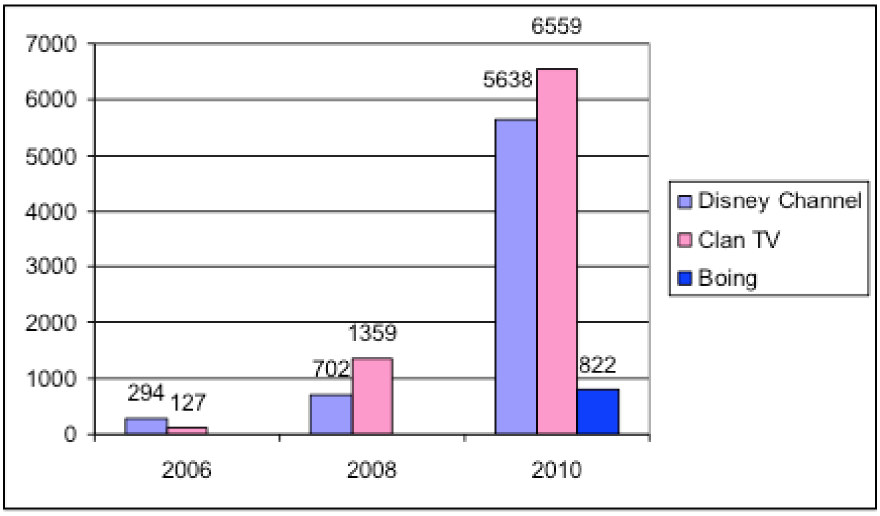
Audience universe: 40.806 (2004); 41.266 (2005); 41.555 (2006); 42.022 (2007); 42.469 (2008); 43.843 (2009); 43.901 (2010); 44.003 (2011); 43.982 (2012).

Source: Kantar Media

Audience of children channels is much lower that for generalist channels. Clan TV has been the leader since 2010. However, like Disney Channel, its audience rating has dropped since the launch of Boing in 2010. Thought two of these channels existed before 2005, the audience have notably increased in the last years, especially since 2010 when Neox changed its target. Another interesting fact is that Disney Channel has not increased its audience since became a free channel. This can be a sign of audience loyalty to the brand.

A reading of Graph 2 discloses that Clan TV, Disney Channel and Boing all show increases in their yearly audience ratings after the digital switchover. Clan TV surpassed an accumulated total figure of six million viewers in 2010. This significance of this total is underscored by the fact that, according to Kantar Media, there were just over 4 million people between the ages of four and twelve (4,027,384) and almost 5.7 million between the ages of thirteen and twenty-four (5,688,158).

Graph 2. Average total audiences (in thousands)



Source: Kantar Media

In addition to these increases in audience figures, children viewers tend to be loyal to their children's channels. Contents such as "SpongeBob" achieve higher ratings on specialized rather than generalist television channels. In March 2011, for instance, the program had a half a million viewers when broadcast on the general channel Cuatro, but over one million viewers when broadcast on Clan TV. Hence, children –and their parents- are loyal to particular channels. These facts are especially important for advertisers in terms of targeting specific audiences (Vázquez, 2011: 153).

4.2. Willingness to pay for children programming

After reviewing the evolution of children programming offer, we will look at the influence of children's programs as a factor on willingness to pay for television contents. To analyze this question we conducted a survey where the target population consisted of all the residents in Spain aged 14 or more (40,606,471 individuals). Sampling was poly-etapic, stratified by autonomous region and size of municipality. The selection of the interviewee in each home was made using gender and age quotas. The final sample size was 1,000. For a confidence level of 95.5% this means a margin of error of 3.1%. Interviews were conducted through CATI (computed aided telephone interview). The average length of the interviews was 15 minutes. The response rate was 18.40%. Since decisions concerning subscription are taken by adults, these data are of a great value despite the fact that children have not been directly consulted. Moreover, satisfaction with children's programming is more a parental concern than a children's issue. For the present purpose, children are considered to be aged between four and twelve years old.

We inquired some questions about the reasons to to pay television. The selected reasons we selected were to avoid advertising, to increase content choice, to have access to some contents such as movies, sports, soccer, documentaries and children programming. The interviewee answered 1 as no important and 5 as very important. A comparison of this factor in relation to the others, in the years before and after the digital switchover, discloses a slight variation.

Table 2. Reasons for willingness to pay for TV (2008-2012)

	2008	2012	Total
Choice	4.13	4.25	4.19
Movies	3.56	3.84	3.71
Ad avoidance	3.46	3.79	3.63
Documentaries	3.40	3.83	3.62
Soccer	3.02	3.76	3.40
Sports	3.03	3.68	3.37
Children prog	2.37	2.56	2.47

Source: own survey

There are different factors influencing the willingness to pay for television programs. The most important ones are increasing choice, movies, advertising avoidance, offerings of documentaries, soccer and other sports, and finally, the children programming. So it is not the most relevant one. However, in spite of the full implementation of DTT, according to the Table 2, the influence of the various factors affecting willingness to pay was higher in 2012 than in 2008. Though there are small changes between the two periods regarding the factors which prompt people to subscribe and the only factors whose importance remains unchanged are the one regarded as most important, the increase of choice for viewers, and the access to programming for children. Access to soccer matches and other sporting events are the factors whose importance has increased most.

With the intention of identifying the profile of the pay television consumer, next tables show socio demographic variables. The Table 3 shows how the reasons are related to the variable sex. The results are quite significant. Men's willingness to pay to view is higher than that of women. Subscription for men is strongly associated with watching soccer and other sports and with avoiding advertising. For women, the willingness to pay for children's programs in 2012 is higher than that for men.

Table 3 Reasons for willingness to pay, by year and sex

	2008			**2012**		
	Men	**Women**	**Z**	**Men**	**Women**	**Z**
Ad avoidance	3.74	3.12	-3.118***	3.86	3.72	-0.968
Choice	4.07	4.20	-0.858	4.28	4.22	-0.723
Movies	3.56	3.57	-0.140	3.82	3.87	-0.460
Soccer	3.45	2.51	-4.059***	4.15	3.26	-4.125***
Sports	3.49	2.46	-4.816***	3.97	3.32	-2.802***
Children prog	**2.38**	**2.35**	**-0.305**	**2.34**	**2.83**	**-2.305****
Documentaries	3.33	3.48	-0.861	3.80	3.87	-0.579

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$
Averages (scale from 1 – nothing – to 5 – a lot) and the Mann-Whitney test

Source: own survey

Tables 4 and 5 show the significance of different factors by age group before and after the switchover. Age seems to be a relevant factor with significant differences between age groups in 2012 but not in 2008. In 2012, young people appear to be more willing to pay than others, especially because of the opportunity to avail of a wider range of options, including children's programs. Meanwhile, older people prefer documentaries and sports other than soccer, and are less willing to pay for children's programs. The 35-44 age group cites access to children's programming as a key reason for their willingness to pay; this may be because the supply of free children's channels is not enough for them and it is the age group in which is more likely to have children.

Table 4 The significance of different factors in willingness to pay for TV channels (2008)

	14-20	21-24	25-34	35-44	45-54	55-64	65-74	>74	Chi-2
Ad avoidance	3.24	3.55	3.47	3.57	3.28	3.68	3.44	3.57	2.519
Choice	4.34	4.38	4.00	4.09	4.02	4.21	3.94	4.12	3.186
Movies	3.79	3.33	3.80	3.46	3.75	3.28	3.26	3.62	4.296
Soccer	3.32	3.00	2.88	3.16	2.73	2.79	3.10	3.62	4.450
Sports	3.21	2.77	3.32	3.02	2.84	2.67	3.00	3.75	5.938
Children prog	1.91	2.16	2.50	2.80	2.09	2.46	2.26	3.00	8.275
Documentaries	2.48	2.94	3.26	3.69	3.78	3.72	3.63	4.00	23.010***

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$

Averages (scale from 1 – nothing – to 5 – a lot) by age in 2008, and the Mann-Whitney test

Source: own survey

Table 5. The significance of different factors in willingness to pay for TV channels (2012)

	14-20	21-24	25-34	35-44	45-54	55-64	65-74	>74	Chi-2
Ad avoidance	3.85	3.58	3.52	3.94	3.77	4.00	4.04	3.33	6.593
Choice	4.70	4.58	4.42	4.00	3.95	4.61	4.21	4.00	19.052***
Movies	3.90	3.94	4.32	3.80	3.47	4.42	3.39	3.11	16.500**
Soccer	3.75	4.00	3.62	3.66	3.61	4.11	3.78	4.22	4.906
Sports	2.95	3.52	3.45	3.72	3.95	4.19	3.39	4.33	13.976*
Children prog	2.20	2.88	2.60	3.29	2.14	2.46	2.26	1.77	17.550***
Documentaries	3.05	3.52	3.95	3.72	3.87	4.26	4.17	3.88	15.777**

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$

Averages (scale from 1 – nothing – to 5 – a lot) by age in 2012, and the Kruskal-Wallis test

Source: own survey

5. DISCUSSION AND CONCLUSION

After analysing audience and consumption data, we can conclude that hypothesis 1 is confirmed. There are more children television channels and the audience and consumption have increased. However, the second hypothesis is more difficult to confirm, because though children programming is still one of the reasons to pay for television, it does not seem as important as other reasons. Women and younger people (from 21 to 44 years old) are more oriented to subscribe because of children contents

There are other conclusions that can be raised from this study. If we analyse television children´s consumption, we can affirm that it has increased after DTT implementation. However, from the supply point of view, there is only one Spanish channel, Clan TV, owned by the public television corporation. The other most popular two channels come from the United States as it happens in many other European countries: Disney channel from Walt Disney Co. and Boing from Time Warner. So, the trend of a very concentrated market and dominated by American companies still remains as a general feature of this market, in spite of the apparent increase of competition. Nevertheless, we can affirm that the Spanish channel, Clan TV is the most viewed channel. Then there is a new window for local producers.

From the educational perspective, we can assert than after DTT implementation, children in Spain are watching programs designed for them in specialized channels, rather than generalist channels as was the case during the nineties. In effect, the free-to-air television range comprises three channels targeting very well-defined audiences and advertisers too. The analysis and reflection of the educational component of these contents should be done in further research. What is clear is that those channels exist because there are advertisers that are focused on children audiences.

Finally, we would like to raise some managerial implications for children programing producers. In the new digital context, to broad the business, companies must run 360º strategies; for example, by diversifying activity towards video games and online services for children where parental control should be available. In this sense, there is still space to be developed. For further research, a study of time devoting to Internet and videogames should be done to see the future for TV children programming. Moreover, the next challenge is to produce children programming with educational intention where quality and profitability was conciliable (Sánchez-Tabernero 2008).

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BREVE SEMBLANZA DE LAS AUTORAS

Mercedes Medina es profesora titular en la Facultad de Comunicación de la Universidad de Navarra. Es autora de más de veinte artículos en revistas científicas. Algunos ejemplos: "Media Market Research on Immigrant Audiences: Lessons Learned From a Critical Analysis of the Spanish Media Survey", en International Journal of Communication (2015), La transformación de las televisiones públicas en servicios digitales en la BBC y RTVE, en Comunicar (2011), "Valoración del servicio público de televisión.Comparación entre la BBC y TVE" en Revista Latina de Comunicación Social (2009), con más de 25 citas. Algunos libros de los que es autora: Series de televisión. El caso de Médico de Familia, Cuéntame cómo pasó y Los Serrano (2009), Calidad y contenidos audiovisuales (2006), European Television Production: Pluralism and Concentration (2004), Valoración publicitaria de los programas de televisión (1998) y Estrategias de marketing de las empresas de televisión en España (1997).

Mónica Herrero es profesora titular en la Facultad de Comunicación (Universidad de Navarra). Experta en empresa audiovisual, economía del entretenimiento y mercados de la comunicación. Ha publicado, entre otros, "Mercado del entretenimiento audiovisual: de la atención al engagement" en Comunicación Social (2013), "La calidad de la oferta televisiva en el Mercado español: las percepciones del público" en ZER (2010) y "The effects of competition in the profitability of European Television Channels" en The Media Industries and their Markets. Quantitative Analysis

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Cristina Etayo es profesora contratada doctora en la Facultad de Comunicación de la Universidad de Navarra. Ha publicado artículos en el Journal of Applied Journalism and Media Studies (2013); en Comunicación y Sociedad (2013); Zer (2011) y en Esic Market. Revista Internacional de Economía y Empresa (2010), y diversos capítulos de libro centrados en la televisión como “¿Cómo y dónde vemos los españoles la televisión?” en La televisión en España. Informe 2011, “La inversión publicitaria en diarios, suplementos y dominicales (1998-2009)” en el Libro Blanco de la Prensa Diaria, AEDE. 2011; “The evolution of the content of the European public TV channels (1996-2004)” en Television and digital media in the 21st century (2010).

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