

Exploring Media Convergence: Evidence from Italy

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Debora Bettiga¹, Andrea Boaretto¹ and Shan Chen^{1,*}¹ Politecnico di Milano, Dept. of Management, Economics and Industrial Engineering, Milan, Italy

* Corresponding author E-mail: shan.chen@polimi.it

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Abstract The evolution of media and devices is enabling the ubiquitous and multi-device access to media and information, so that a media mutual contamination is in play. New forms of user interactions with media, in which different devices are used simultaneously in different contexts, have emerged. These new interactions are significantly impacting on users' attitudes towards the media and their way of searching and generating content. Such a change, called "media convergence", has a strong potential impact on marketing and communication processes, but as yet has not been deeply analysed in the literature. This paper presents the outcomes of several studies aimed at exploring media convergence on the demand-side to advance possible implications for marketers and managers.

Keywords Media Convergence, Customer Behaviour, Context, Marketing, Italy

1. Introduction

The technological evolution of connections and devices is impacting deeply on the role of media, and the distinction between and relationships among media, in this so-called

process of "media convergence" [1, 2]: whereas with connectivity and the increase in band width, in addition to devices becoming more and more powerful, it is increasingly possible for individuals to access media from different devices, at different moments of their lives and also to use different devices simultaneously [3]. This progressive convergence has been further accelerated by a reconfiguration of the media supply chain, in which mergers and acquisitions – within the media, telecommunications, information technology and publishing have blurred the boundaries between media and devices, and broken the media/device combination (e.g., video broadcasting-TV, website-computer, etc.) [4]. Convergence raises two important managerial challenges: on the one hand, the need by companies to redefine their business models and marketing practices to affirm their positioning; on the other hand, a dramatic change in customer habits and behaviour [5]. Some data testify to how media convergence, rather than being an emerging phenomenon, is already a consolidated trend in customer behaviour: 73% of smartphone owners in the US surf the web through their mobile device, 54% watch videos, while 33% of Italian tablet owners use their device to access banking systems and 15% usually surf the web while watching TV [6]. However, despite its actual

emergence, a vivid debate and some preliminary studies on the scenarios enabled [2], the phenomenon of media convergence has mostly been analysed from the sociological, rather than the economic and managerial perspective. This appears to be a limitation in extant research, considering how potentially important it would be for companies, the advertising industry and marketers in general to better understand how to approach communication, advertising and, in general, customer relationship management in the new scenario enabled by media convergence. For this reason, the objective of this paper is to provide an analysis of the customer behaviours enabled by media convergence in order to provide practitioners with guidelines for approaching communication and marketing in the scenario enabled by media convergence. The rest of the paper is articulated as follows: first, we will refine the concept of media converge in order to introduce the centrality of the variable "context" in the analysis of the impact of media convergence on customer behaviour. This will lead to the definition of the framework for the empirical exercise which will be first introduced from a methodological viewpoint and then described in terms of results. These results will suggest implications, which will be discussed in the last section of the paper.

2. Research framework

2.1 Media convergence

In one of the widest accepted definitions, media converged is proffered as: *"The flow of content across multiple media platforms, the cooperation between multiple media industries [...] which fell at the interstices between old and new media, and the migratory behavior of media audiences who would go almost anywhere in search of the kinds of entertainment experiences they wanted. Convergence [...] describe[s] technological, industrial, cultural, and social changes. Sooner or later, all media content is going to flow through a single black box into our living rooms (or in the mobile scenario, through black boxes we carry around with us everywhere we go)." [2].*

The vision of a progressive media convergence is not a newly developed concept: since the late 1970s, a scenario of the digitalization of information leading to an increasing overlap among telecommunications, information technology and media has been foreseen as a natural and user-centred evolution of society as a whole [7]. Such a convergence implies a multimedia landscape in which the boundaries among media are blurred and finally the differences among media are actually erased, in a process in which different actors are involved and cooperating such as : (i) publishers (on the supply-side) providing digital content through different, interoperable devices; (ii) users (on the demand-side) both using

technologies and devices to access digital information and co-creating content with publishers and other users; (iii) public bodies, defining policies for regulating the information flow [8-10].

If the analysis of the supply-side implications lies at the core of this paper and is the final contribution, demand-side and partly the policy-making-side variables represent a fundamental cornerstone for reaching a better understanding of convergence. In fact, the intrinsic co-creative nature of media convergence is to be seen not only as the possibility for users to generate content [11], but also their renewed ability to access whatever content at whatever moment, ideally from whatever device [12]. This element is particularly important and lies at the core of the analysis of media convergence: if the availability of devices and media is essentially ubiquitous, the choice by users is not just in terms of what content, but also - and foremost - on what content in which context, i.e., the specific situation in which content is enjoyed/generated. For this reason, if media convergence highlights the increasing presence of media in whatever step of human life, the core of convergence analysis lies in the understanding of the relationship between media/devices and the specific context of a human existence.

2.2 The centrality of contexts

The term "context" has been widely defined in the literature, assuming different declinations depending on the reference field.

The term was first introduced by [13] that defined the "context-aware" concept by referring to contexts such as locations, identities constituted by close people or objects that could change. This definition has been, however, considered as not very useful, at least for practical purposes, as it was constructed by only using examples of contexts. Others definitions (e.g., [14]) suffered from the same problem of pragmatic irrelevance, because of being constructed by using synonyms of context, such as environment or situation.

A more operational definition has been introduced by [15], that one's context is defined by the place, the people surrounding this and the resources that are close to one. Similarly, [16] conceptualized context as a physical and conceptual state of interest in regard to a particular entity.

By far one the most comprehensive and holistic definitions has been given by [17], who stated: *"Context is any information that can be used to characterize the situation of an entity. An entity is a person, place, or object that is considered relevant to the interaction between a user and an application, including the user and applications themselves."* This definition is declaredly broad in scope, with the aim

of covering all context meanings, at least in the context-based interaction field. A formal as well as operational extension of the definition has been developed by [18]. The authors conceptualized first of all the formal definition of context, classifying the elements for the description of context information into five categories: individuality, activity, location, time and relations. The individuality category refers to entity properties and attributes; the activity class gathers possible entity tasks; the location and time categories give the spatial-temporal coordinates for the entity; while the relations category represents information about connections. Secondly, they developed the operational definition of context that includes the dynamic context characteristics and provides the basis for the use of the concept in context-aware applications: transitions between contexts and sharing contexts among several entities.

Over the last few decades, context has become a key issue especially in human-computer interaction and in various areas of computer science. In marketing studies, the context concept has been adopted for the study of context effect in the consumer process of choice. Previous research (e.g., [19-23]) has proffered that the context of use has a major impact on consumer preferences and the explanation of choices [24]. Scholars in marketing have assumed that the purchasing process is contingent upon the context in which the transaction takes place and customers can adopt different decisions and prefer different brands, products or services depending on the context. [25] asserted that *"consumers vary in their decision-making rules because of the usage situation, the use of the good or service (for family, for gift, for themselves) and the purchase situation (catalog sale, in-store shelf selection, and sales person aided purchase)."* [24] examined the usage context effect in consumer problem solving, starting from the assumption that the context could act as a "positive constraint" in reducing the feasible choices that a consumer could face in the decision-making process [26]. They found evidence for this assumption and also some tentative support that the processes of choice are different in familiar and unfamiliar situations.

According to these results, behavioural theory suggested that context affects user attitude and therefore influences acceptance [27]. In this field, [28] found that two contextual factors, perceived waiting time and crowding, have a great mediating influence on the formation of attitude and intention of use of self-service technology. [27] asserted that context was a significant determinant for consumers' intention to use the mobile ticketing service.

More recent research [29] has proved that by considering the context of a transaction in modelling, the predictive power of customer behaviour, especially individual

behaviour, is increased. The authors showed that since each customer may have different behavioural patterns in respect to different contexts, a behavioural segmentation may not be useful if context is not included in the analysis. The authors developed a classification similar to [30] where a paradigm for the incorporation of context into the recommender systems has also been proposed. As a result, context emerges as defined by personal, behavioural, locational, time-related and social situations, and has a direct impact on customer behaviour, modifying the individuals' choices and actions. From this perspective, context represents a fundamental variable for analysing media consumption and, hence, media convergence on the consumer side.

2.3 Research questions and framework

Our study aims to investigate two main research questions:

RQ1: how is media convergence impacting on media consumption by consumers?

RQ2: how can companies face the change in the pattern of media consumption enabled by media convergence?

In order to answer these questions, following the previous discussion, we aim to analyse device and media consumption through the study of a sample of consumers in the different contexts of their lives.

Hence, the two main variables to be observed in the study are media/devices and contexts. As for media/devices, we included in our analysis the broadest set of wired (i.e., TV, laptop, radio, video game console and audio-video reproducers) and mobile (i.e., smartphone, tablet, laptop, radio, mp3 readers, audio-video reproducers, game console and e-book) devices. Since several devices may be used as both wired and mobile, we have considered the cases separately. Since media convergence is making the distinction among media extremely complex, we have analysed the genre of the content rather than the media used (information vs. entertainment vs. game) and the type of relationship the user has with the content (enjoyed, generated or shared).

As for context, the literature review has shown how very different taxonomies of contexts have been developed. The seminal contribution in this respect comes from [22] that defined five categories of the environment: physical, social, temporal, task definition and antecedent states. In the study of [31] on context-dependent mobile services, the author defined a three-dimensional space constituted by the user's identity, location and time of access. [27] extended this work, defining context into two categories: physical environment and human/personal factors, which were further detailed into sub categories. In the literature on context-aware systems, context is conceptualized as

the location of the user, the identity of close people, the objects near the user, and eventually changes in these elements [13]. [32] identified the date, the season and the temperature. [33] identified the user's physical and conceptual status of interest, while a user's emotional status classification has been developed by [34]. Given the objectives of this study, we will essentially focus on the time and space dimension of context

3. Method

In order to address the research questions, the study has followed a structured methodological approach:

- At first, in order to refine the conceptual landscape of the study, 50 in-depth, personal interviews were conducted. They were conducted by professional interviewers on a sample of individuals belonging to different age classes, geographical provenience, income and education in order to get a comprehensive understanding of the *devices* and the relevant *contexts* for them. These interviews dealt with an exploration of the technologies and devices owned and used by the individuals; the moments of their lives in which they used them; and how, to what extent and through which connection (if any) they used them. Each interview lasted on average 30 minutes and was type-recorded and successively analysed following the data contextualization and data categorization method [35, 36] to obtain an interpretative scheme.
- The robustness of the exploratory framework of contexts and media consumption was tested through a survey based on computer-aided telephone interviews (CATI) on 3,000 Italians (15-64 years old) in order to understand not only if other contexts and devices which emerged during the in-depth interviews were significantly in play, but also if the size and the profile of the market of the consumers presenting behaviours was consistent with the definition of media convergence (i.e., broadband internet users using mobile and non-mobile devices daily, enjoying different media, using different devices in different contexts of their lives, etc.). These consumers were called "potential convergent" (PC) individuals.
- Finally, 1,500 face-to-face interviews were conducted on a sample of citizens reflecting the profile of PCs in order to describe their media and device consumption in the different contexts of their lives. In particular, given the context of the framework developed in the first two steps of the study, questions were asked regarding the media used in the different contexts, the time of day in which different devices were used, media and genres used and enjoyed by PCs, and the intensity of their usage.

Thanks to this rich exploratory/explanatory and qualitative/quantitative methodology we obtained a shared framework and a clear description of the phenomenon of media convergence in Italy. In order to also get an evolutionary path in the study, two data gathering procedures were used, the former in late 2011, and the latter in mid-2012. This enabled us to also analyse the evolutionary paths in media convergence diffusion in Italy.

4. Results

To introduce the results of the study, we will follow the logical structure of the empirical exercise. First, we will introduce the context framework which emerged as relevant during the exploratory interviews. Second, we will describe the cluster of PCs and define its main characteristics. Finally, we will analyse the media consumption by PCs, both in the contexts and in general, to provide a comprehensive overview on the phenomenon of media convergence in practice.

4.1 Framework of the contexts

The exploratory interviews testified to a broad set of contexts in which individuals use or enjoy media. The research design, as described in section 2.3, emphasized the time and space connotations of contexts, investigating in detail the different moments of the day and the different rooms of the house on the one hand, and a broad set of outdoor places visited daily or episodically by individuals. The exploratory interviews refined the framework detecting those very contexts in which media consumption is in play. The exploratory interviews, in particular, highlighted the following indoor spaces: kitchen/dining room, living room, main bedroom, secondary bedroom. In terms of the time of day, the following key moments emerged from the interviews: breakfast, lunch, afternoon, before dinner, dinner, after dinner, before sleeping. Interestingly, no reference to morning media consumption at home was highlighted in the exploratory interviews. In terms of out-of-home contexts, the following emerged from the interviews as "daily": commuting via private means of transportation, travel back home via private means, breaks in office, commuting on public transportation, lunch break in office, travel back home via public transportation, schools/universities/libraries, extra-urban commuting, waiting areas. Moreover, a series of non-daily contexts in which media consumption occurs emerged: malls, retail outlets and other individual spaces (e.g., gyms, etc.), train journeys, airports, train stations, in-flight. These contexts were essentially confirmed also in the CATI analysis.

4.2 Potential convergents: who are they?

Given the definition of PC reported in section 3, the CATI analysis highlighted that 40% of the interviewed in 2011

and 43% in 2012 were PCs. This means, given the structure of the Italian population, some 16 million Italians in 2011 and 17.2 million (+7.5%) in 2012. In 2012, 57.25% of the PCs were men (essentially stable compared to 2011) testifying how convergence currently relates to men more than women. In particular, 50% of males and 37% of females interviewed fell into the definition of PCs. Table 1 details the age breakdown, testifying how PCs are more than the majority of the population in respect to age classes between 15 and 34 years, while they become a minority between 35 and 44 y.o. (46% of the interviewees on average in 2012), between 45 and 54 y.o. (26% on average) and between 55 and 64 y.o. (15% on average).

Women			
Age class	% on total PCs	Re-scaled number of PCs (mil.)	% of PCs in the age class
15-17 y.o.	9.3%	0.68	81%
18-24 y.o.	21.1%	1.54	73%
25-34 y.o.	27.8%	2.03	54%
35-44 y.o.	25.9%	1.89	39%
45-54 y.o.	12.6%	0.92	20%
55-64 y.o.	3.3%	0.24	6%
Men			
Age class	% on total PCs	Re-scaled number of PCs (mil.)	% of PCs in the age class
15-17 y.o.	7.0%	0.69	78%
18-24 y.o.	16.5%	1.63	73%
25-34 y.o.	27.1%	2.67	71%
35-44 y.o.	25.9%	2.56	53%
45-54 y.o.	14.4%	1.42	32%
55-64 y.o.	9.1%	0.9	25%

Table 1. Age breakdown of Italian PCs (2012).

In terms of devices used in an average day, the data reported in Table 2 testify how the penetration of devices is broad and their use is essentially daily especially as far as computers and mobiles (smartphone) are concerned. The penetration of tablets is significantly lower than smartphones (19.5% vs. 79.6%), but almost two thirds (65.6%) of tablet users are also smartphone users, indicating how the penetration of tablets, being an evolution of the penetration of smartphones, should increase significantly in the very near future.

Device	% PCs using the device every day	Total daily time spent using the device (a x b), data in min.)
TV	99.0%	194,3
Desktop + Laptop	93.6%	275,9
Smartphone	79.6%	91,2
Radio	53.1%	91,8
Press	21.7%	40,7
Tablet	19.5%	94,5
Mp3 reader	7.2%	58,8
Other devices	16.5%	148,0

Table 2. Devices used daily by PCs in Italy (2012).

Among the different characteristics of the PC cluster, the frequency of out-of-home experiences appears extremely interesting. Regarding out-of-home, 98.3% of PCs (compared to 85% of the total population) commute or at least undertake journeys in two or three days per week. This testifies as to how PCs are generally more often in mobility than the average population, emphasizing that mobility could represent a peculiar context of media enjoyment. Secondly, it is interesting to note that PCs have a media consumption that is well distributed along the day, with the usual peaks in the so-called prime time (7-10 p.m.), but with significant penetration of media essentially all day long (besides night hours, substantially no hour has less than 30% of PCs enjoying a media; see Figure 1).

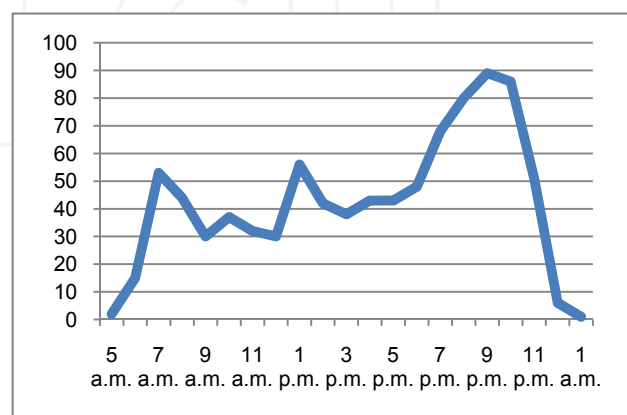


Figure 1. Percentage of PCs enjoying one or more media in the considered time (2012).

From the evidence, at a glance it appears that PCs are a young, but not extremely young target, covering almost half of the Italian population, and encompassing in general individuals who commute and move on a daily basis and enjoy different devices at different moments of their lives, and who use media and devices all day long. Almost all of them own more than one device connected to the Internet, and they spend on average more than 16 hours of their day using devices able to provide media experiences (either for work or for leisure).

4.3 PCs, media, devices and contexts

The first important piece of evidence from the analysis of device/media usage and consumption by PCs is depicted in Figure 2, where the daily distribution of the use of devices is reported. Besides the great diversity in the device mix (with radio strongly used in the morning, desktops and laptops heavily used in the afternoon/evening, reasonably by students especially in the afternoon, TV heavily used in prime time and around lunch time and quite a constant use of smartphones and tablets), it is interesting to note how the sum of the

percentages on every hour is, on average, 1.12 times higher than the percentages reported in Figure 1. This means that the phenomenon of contextual use of different devices is quite rooted in a significant part of the population (almost 1.9 million Italians, more than 5% of the total population between 15 and 65 y.o.).

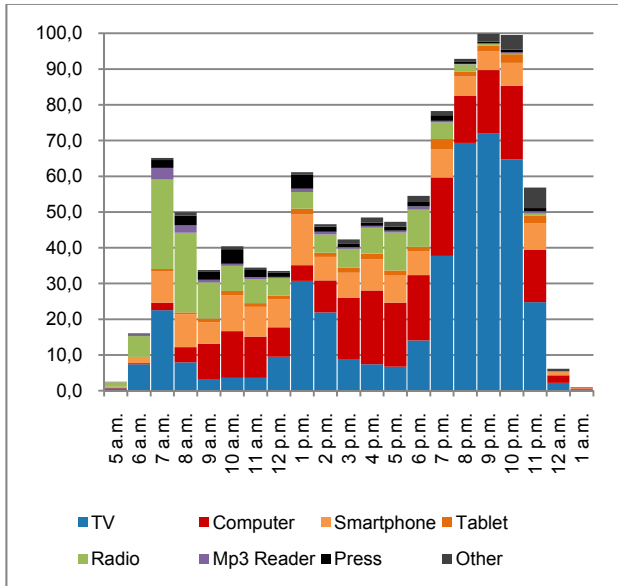


Figure 2. Percentage of PCs using the different types of devices during the day (2012). Note: the sum of the different columns may differ from the ones in Figure 1 because of the possible concurrent use of different devices by the same individual.

Despite such diversity in device usage, PCs demonstrate a strong “specialization” in the usage, i.e., association of the device to a specific genre as described in Table 3. In fact, if desktops/laptops display a very wide distribution of genres, in the other cases, more than 70% of the usage experiences (and often more than 90%, especially in traditional mass media such as TV and radio) refer to a single genre, testifying how these devices are almost univocally associated to a specific need by the user.

Device	Most relevant genre enjoyed (average daily % of experiences)	Second most genre enjoyed (average daily % of experiences)
TV	Entertainment (65%)	Information (32%)
Computer	Socialization and relationship management (27%)	Entertainment (22%)
Smartphone	Socialization and relationship management (63%)	Entertainment (16%)
Tablet	Socialization and relationship management (42%)	Entertainment (25%)
Radio	Entertainment (88%)	Information (9%)

Table 3. Top two types of use (expressed as % of the uses declared) by device by PCs (2012).

Observing media consumption in the different contexts, it is clearly possible to observe how both home (Figure 3) and out-of-home (Figure 4) contexts attract several media experiences (i.e., use of devices for enjoying a media), indicating how media convergence enables the enjoyment of media in very diverse contexts, in which the interests of individuals are very diverse.

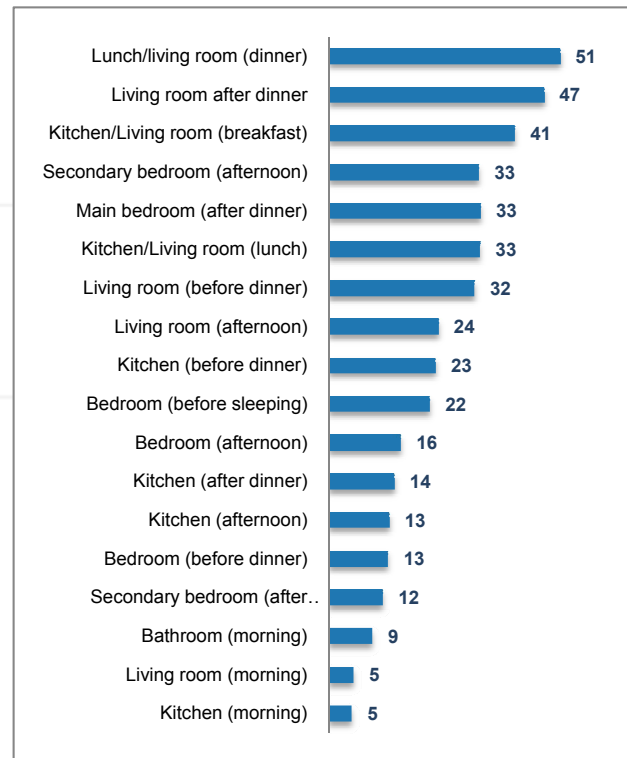


Figure 3. Percentage of PCs having daily media experiences in the different home contexts (2012).

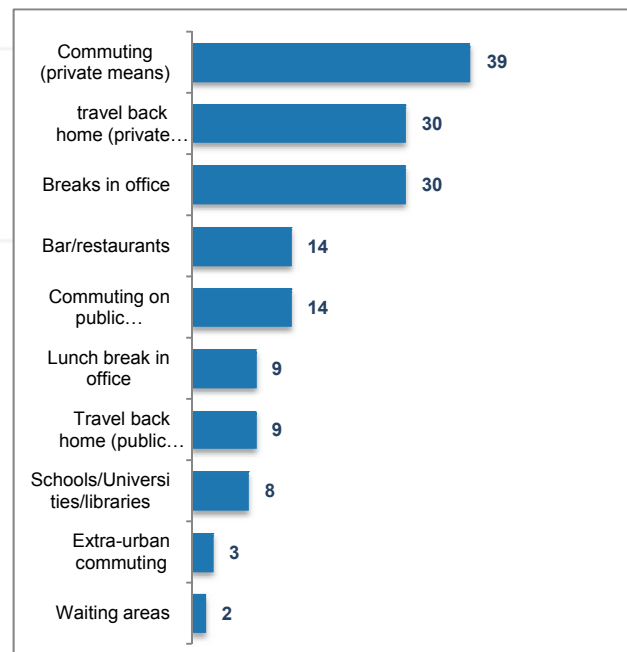


Figure 4. Percentage of PCs having daily media experiences in the different out-of-home contexts (2012).

Analysing Figure 3, it is possible to outline how the kitchen and living room are the main areas of media experience in the house, but also how frequent media experiences in bedrooms are more personalized, and generally computer-enabled media consumption. The data on out-of-home consumption instead emphasize the extraordinary relevance of those contexts in the day in which technology enables media consumption which was formerly impossible: commuting, breaks and waiting areas have become very important moments of information, entertainment, relationship management or even training involving very significant percentages of PCs.

5. Discussion

The evidence presented in this study sheds light on the much debated, although seldom analysed in-depth, topic of media convergence, contributing to the understanding of the phenomenon in several ways: first, it provides a preliminary estimation of the size of the target of PCs, setting it at over 17 million Italians, representing more than 40% of the market in the 15-65 y.o. class. Second, it shows how these PCs are actually rich in devices and access very diverse media through them in different contexts, both at home and while moving. As a result, the study provides a detailed, rich, even if mostly descriptive, answer to RQ1 for Italy. Such an answer, to the best of our knowledge, is substantially new and provides a strong setting for further research: the demonstration that devices are used so diversely in terms of media/genre enjoyed, context of use and also time of day suggests that research on digital markets or multichannel consumer behaviour must take context into account in order to be reliable and really predictive of real behaviours. But, besides this extremely important theoretical contribution, the study is rich in implications for marketers. The first relevant implication lies in the profile of PCs. The fact that almost half of the population, and the majority of the population 35 y.o. or younger, belongs to the segment of PCs implies that, for the future, every marketing plan must be multichannel, and various functions within a company should share this vision of this evolution [37, 38]; in fact, this finding shows that in the next few years, extremely significant market shares will be determined by consumers who are structurally inclined to use different devices and to look for information and entertainment in different media. Ubiquity in communication is hence a fundamental trend to be taken into account when developing marketing plans in the era of media convergence. Second, the data highlight very clearly how second screen experiences are quite systematically in play among PCs. Second screen experiences are those situations in which two different devices are used by a user at the same time. Over the last few years, several observers have noticed that, despite the growth of the Internet, TV and other mass media remain

the most watched and followed media, and for this reason they have justified, despite the relative decrease in terms of communication budget in favour of new media, the pre-eminence of TV as the “strongest” medium for communicating. The evidence about second screen experiences suggests that the difference in audience attention can be extremely significant (e.g., when using a smartphone to chat while watching TV, probably attention is focused on the smartphone, not the TV), hence, in order to increase it, multichannel communication establishing content links between what is being broadcast and what is being communicated on other media could represent a useful tool to win consumers’ attention. This, nonetheless, raises a very significant question with regard to higher integration in the communication supply chain, a poorly analysed topic in contemporary literature which could benefit from stronger frameworks for fostering collaboration (e.g., [39], [40], [41]).

Finally, the work presents a third paramount managerial implication: the data presented indicate how ICTs and media convergence make it possible for consumers to access media in contexts and situations that were formerly merely offline and that can attract very high levels of attention: transportation, waiting areas, and more in general the time lapses in which individuals are waiting and looking for something to do. This time is not only characterized by consumers’ willingness to access media (as demonstrated by the general penetration of media experiences in these contexts – Figure 4), but they are also highly attentive to media in those contexts, with a positive attitude to information gathering and processing. For this reason, the formats of communication (in terms of length and depth of the information, for instance) when targeting these very contexts could also lead to extremely interesting acceptance by consumers and the possibility of establishing stronger customer relationships thus helping to foster the dialogue and reinforce the brand.

5. Limitations and conclusion

The main limitation of this study lies in its descriptive and exploratory nature: we have observed a poorly defined phenomenon, such as media convergence, and we have explored its diffusion, providing a picture of the situation, rather than of the causes of such a situation. Moreover, we limited our analysis to Italy, a market that is generally considered extremely advanced in terms of mobile penetration [42], but not one of the most advanced in terms of computer usage [43]. This testifies to the country-specific variables which may strongly influence the outcomes of this kind of study. These limitations, though, can be addressed in the future by strengthening, also thanks to the results of this study, the definition of the key constructs (e.g., PCs) in order to establish the

antecedents of these phenomena at a personal level; in fact, understanding the personal motivations for introducing convergent behaviours in media consumption may represent an extraordinary lever for improving companies' effectiveness in market communications, by providing better services and experiences (e.g., [11]). Second, we warmly encourage the replication of studies like the one presented here in other countries in order to understand whether the media convergence phenomenon is emerging differently in different country contexts. Last but not least, the emergence of context as a key variable for observing marketing phenomena and this raises a question about the appropriateness of decontextualized surveys in this kind of research. Probably, a reinforcement of more intensive methods, such as qualitative studies (e.g., [44]) and observations (e.g., [45]), could be beneficial.

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