

# Post-Broadcast TV Content Consumption Patterns - A Research into Contemporary Croatian Consumers' Viewing Habits

Darijo Čerepinko, Željka Bagarić, Lidija Dujčić

Department for Public Relations, University "North", Varaždin, Croatia

## ABSTRACT

*In the post-broadcast television era marked by technology convergence content consumption has undergone major transformations and that process is still ongoing. With the digital age, multiple new opportunities to watch television content on different devices, in different places and in changed social surrounding have opened up. Different devices, such as tablets and smartphones, have become integrated into the content consumption behavior and have even become the main device used for television or on demand content consumption. Consumers are migrating to streaming and on demand services, and traditional media adapt to the new pace of changing viewer habits. The constant audience transformation shows that multiscreen living rooms are turning into many single screen rooms through the usage of individual digital devices as they become the primary source of content consumption. In order to understand the trends that are changing at a fast pace, this paper will look into different aspects of new media consumption trends through quantitative research. Understanding the current consumer preferences in the latest digital technological shift is an important element that helps shape television program production, distribution and marketing decisions.*

**Key words:** *technology convergence, television, new media, content, digital age*

## Introduction

In the era of technology convergence content consumption has undergone major transformations. The digital age has opened up multiple new opportunities to watch television content on different devices, in different places and in changed social surroundings. Mobile devices, such as tablets and smartphones, have entered traditional living rooms and have become integrated into the content consumption behaviour and have even become the main device used for television or on demand content consumption. With the trends of migration to streaming and on demand services, traditional media adapt to the new pace of changing viewer habits. Exclusive content is produced to be distributed online in order to reach the new audiences and to keep them engaged while they are using multiple screens. The constant audience transformation shows that multiscreen living rooms are turning into many single screen rooms through the usage of individual digital devices as they become the primary source of content consumption.

Recent research in the industry and the academia is focused on the development of new patterns of content consumptions. Industry research focuses on the strategic side of the business, while academics focus on identifying concepts, behaviour patterns and research methodologies. In order to understand the trends that are changing at a fast pace, this paper will look into different aspects of new media consumption trends through quantitative research:

- (1) how do different generations of TV content consumers watch contemporary TV content?
- (2) how has the social situation of watching TV changed in the post-broadcast era?
- (3) what are the differences between preferred media and technology for viewing TV content between different demographic segments?

## Post-Broadcast TV Era

Traditional broadcast television is characterised by a one-to-many mode of address and it is organized as a large-scale industry. In the broadcast era, the relationship between audiences and television, as an important source of mass communication, was marked by the use and consumption of television by individuals as group members, and in social contexts that enabled a high degree of interpersonal communication<sup>1</sup>. At the beginning of the 21<sup>st</sup> century, television has entered a post-broadcast era, in which television is characterised by interactivity, customization, multiple platforms and non-broadcast television screen entertainment carried by different technologies<sup>2</sup>. The decline of the broadcast era has been influenced by industrial and technological convergence in telecommunications, information technology and electronic media<sup>3</sup>. Consumers started to spend their viewing time on online, on demand and streaming content. This has been led by early adopters of technology and younger generations. The prolific media environment also influenced the alteration of viewers' engagement with television. Mobile devices, including smartphones, tablets and laptops, have entered the usual television viewing surroundings, especially the traditional living room, which has created a multiscreen viewing experience. Furthermore, personal consumption on different screens has deepened the physical and interpersonal divide from the joint viewing experience in a multiscreen living room<sup>4</sup>. Viewers can consume television and video content in general wherever they have access to a computer, mobile phone or television set. The development of these new patterns of audience exposure also stimulates the development of new business models<sup>5</sup>.

## New Television Content Consumption Patterns

With the emergence of streaming platforms, commercial-free viewing experience, and seamless episode delivery, consumers are watching more television, and in longer periods at a time. The preference for OTT (over-the-top) streaming services and video-on-demand services has been growing ever since, which interferes with the experience of the consumption of shared and mass-mediated content. This has been especially visible in the content consumption patterns of the newest generations, more specifically generations Z and Y<sup>6</sup>. Binge watching has moreover been identified as the main driver of young people's expectations about television production, distribution, and consumption<sup>6</sup>. Services like Netflix have largely created a pattern of consumption where viewers can stream their favourite content and watch all episodes sequentially.

Consumption on the go and the separation of individual consumption experience from the main living room consumption experience have also emerged. The previously known conflict on what to watch has vanished since consumers became autonomous. Yet the need for social belonging and participation in social conversations have

been stimulating binge watching and have transformed the scheduled to on-demand viewing and therefore the sense of community and belonging has not been lost with the digital age<sup>6</sup>. Furthermore, the "media citizenship" associated with national broadcast systems began to migrate to sites based on communities that were more fragmented and virtual<sup>7</sup>, with digital being the underlying basis for the development of such communities.

In the broadcast era broadcasters decided when viewers could watch their content and viewers were mostly tied to particular locations such as living rooms or movie cinemas. In the new media landscape, where everything is mobile, viewers consume content wherever they have access to the smartphone or laptop, for example. Since the viewers nowadays can take their screens with them, they can control when and where they watch television content<sup>5</sup>.

## Cross-Platform Content Consumption

Even though in some age groups linear television remains a predominant visual media source, content use in the digital age shows significant shifts to diverse electronic media and platforms<sup>8</sup>. Recent research has identified many patterns of television content usage on different media, finding significant correlations with age and lifestyle. Similar to television sets over the second half of the last century, mobile devices, especially smartphones, have become a part of our daily lives and consumers are increasingly using mobile devices while watching television<sup>9</sup> and even using it as a primary medium for watching television.

Since television viewing today is fragmented and complex, it is important to understand that there are more factors that influence the viewers screen of choice<sup>5</sup>, such as

- technological factors including bandwidth, signal availability, picture quality and battery life,
- physical location whereby a large flat-screen television is more likely to be found at home, and a mobile phone is naturally more likely to be used outside of home and on-the-go,
- the interaction between screen type and programming characteristics, whereby live events such as live sporting events are more likely to be broadcast on linear television since it has more value to the viewer at the time of broadcast,
- the desired depth of interaction with the program or the content, whereby viewers might watch content on a television set and simultaneously search for related information online
- business models that viewers prefer for their screen of choice

Recent research<sup>5</sup> has found out that rather than fully replacing them, most consumers are adding new platforms to their viewing habits, whereby they are multitasking on different screens and using mobile technologies ie smartphones, tablets or laptops to fill time in between other content consumption. Furthermore, positive correlation is

often found between the use of television and Internet, meaning that many viewers that own use new communication technologies consume more traditional media than other viewers. Therefore, using new technologies is rather additive to older technologies than replacing them.

## Methodology

An online survey was conducted with a random sample of Croatian television viewers of a total of N=102. The main idea was to understand the different television content consumption patterns with different age groups and how the digital era has transformed the social settings of television consumption.

## Results and Discussion

It was important to understand what technologies were used by respondents that could impact their television content viewing patterns. Almost all, or 98% of the respondents stated that they own a TV set at home. Most of the respondents stated that they own a smartphone (93,1%), around 3/4 of respondents (76,5%) stated that they own a laptop, and half of the respondents (50%) own a tablet.

The main findings are focused around the key three questions that were set in the beginning of this research:

- (1) how do different generations of TV content consumers watch contemporary TV content?
- (2) how has the social situation of watching TV changed in the post-broadcast era?, (3) what are the differences between preferred media and technology for viewing TV content between different demographic segments?

### *Generational differences of television content consumption*

In the survey, it was important to understand the different habits of viewing linear vs. on demand television content between different age groups.

Respondents were asked to quantify their viewing of linear TV channels, meaning regular broadcast TV channels. There is a clear distinction between younger and older age groups in linear content consumption. The oldest age group mostly watches linear television content daily, while in the youngest age group linear content is watched less frequently.

When asked the same question about on demand content, the frequency of daily consumption of on demand content is the highest with the 15-24 years old respondents, followed by the 25-34 year old respondents who watch on demand content several times per week.

When asked to state their preferred way of watching television content in general, it is clearly visible that the trend of mobile viewing and on demand viewing is created by younger generations.

Similarly, when asked about the device that they mostly use for television content consumption, a clear preference is shown in different age groups, with smartphone among younger respondents, TV set followed by PC or laptop by the respondents in the 25-34 years age group, and older respondents more traditionally using TV sets.

### *Emerging patterns of new social situations of watching television content*

The following graph shows the differences in the social situation of viewing television between different age segments. Most of the respondents in the age group of 25-34 and in the youngest group responded that they view linear or traditional TV content together with other family members. With the increase in the age group, this ratio changes and more older respondents watch linear television content on their own.

Unlike linear TV channels which even more so in the younger age groups are watched together with family members, watching on demand content shows a completely different set of viewing habits. The youngest respondents mostly watch on demand content on their own. The oldest age group watches on demand content almost equally alone and with more household members, which in general shows that it is more likely that they consume television content in general more on their own, regardless of whether they watch linear or on demand content.

A separate question was asked about the binge-watching of TV series. Only a small percent of the youngest respondent group do not binge-watch TV series or do not watch TV series at all. Interestingly, the ratio in the oldest group of respondents between respondents who do and do not binge-watch is almost the same.

When asked about the specific parts of the day and week when on-demand content is watched, younger respondents almost equally watch content throughout the day, both on weekdays and weekends, however slightly more during weekdays. All other age groups report more content watched in the evening, 25-34 year olds' more on weekend evening, and 35+ year olds more on weekdays evening.

The same age group that shows the highest preference for on demand content also spends the highest number of hours watching television content, which is visible in the next graph:

### *Key differences between preferred media and technology of different demographic segments*

When asked to list all devices that are used for viewing television content, younger respondents report higher use of additional devices, specifically the smartphone. However a television set is used similarly across all age groups, with some decline in the group of 25-34 year olds.

Respondents were also asked to list devices they use as add-on devices while watching television content, meaning which devices they use simultaneously while consuming television programs (multiscreen usage during content consumption). Younger respondents mostly used the mobile

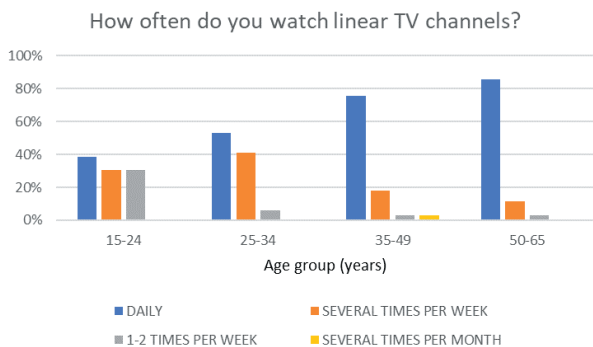


Fig. 1. Viewing of linear TV channels.

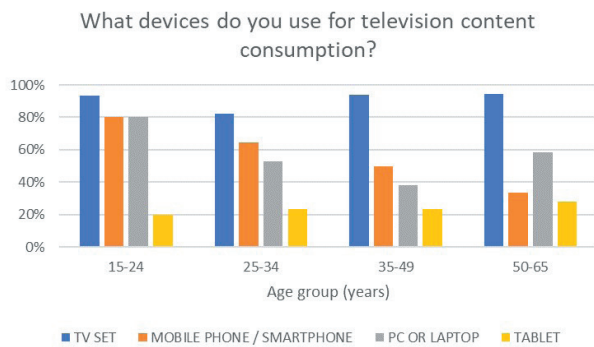


Fig. 2. Viewing of on demand content in different age groups.

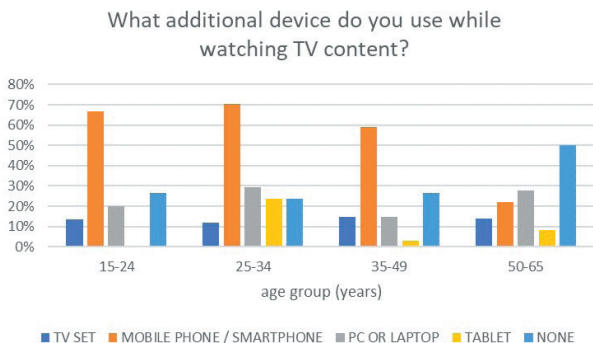


Fig. 3. Preferred way of viewing television content (linear vs. on demand) in different age groups.

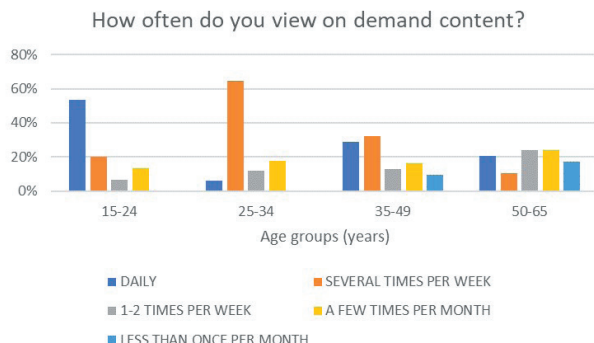


Fig. 4. Most used device for television content consumption.

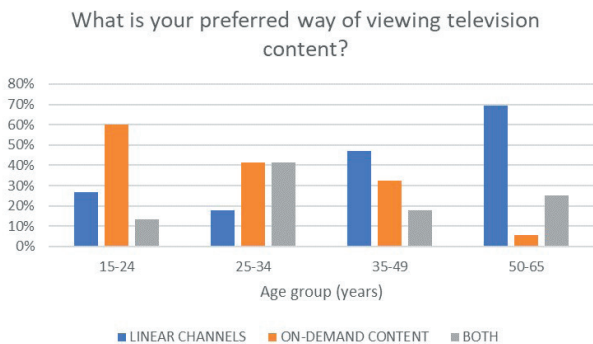


Fig. 5. Viewing linear content with family members or alone in different age groups.

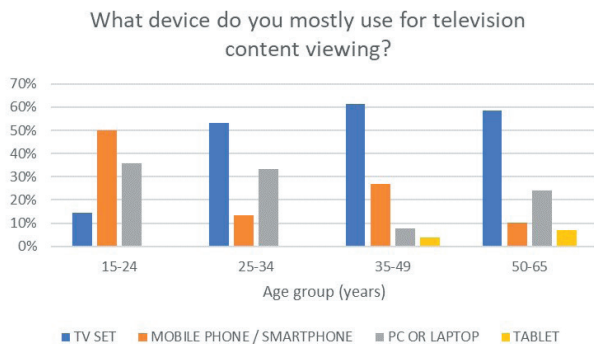


Fig. 6. Viewing of on-demand content in different age groups.

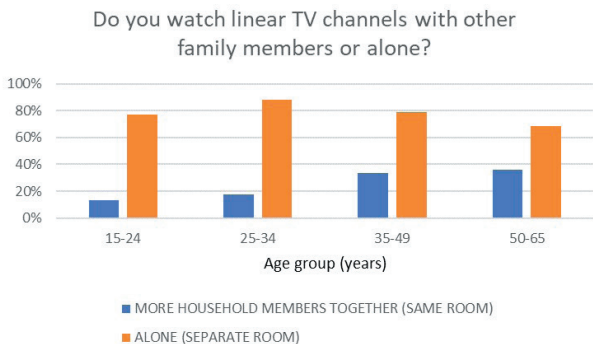


Fig. 7. Binge watching habits in different age groups.

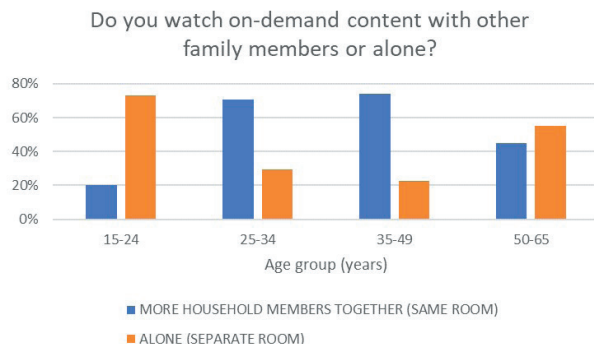


Fig. 8. Time of the day and week for watching television content in different age groups.



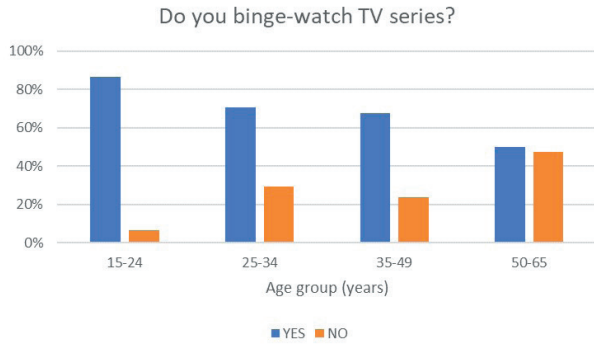


Fig. 9. Hours spent on content viewing in different age groups.

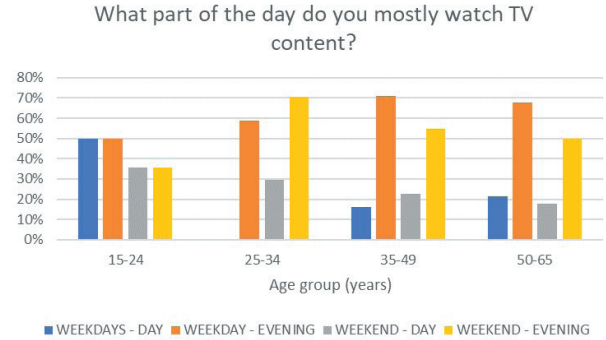


Fig. 10. All devices used for television content consumption in different age groups.

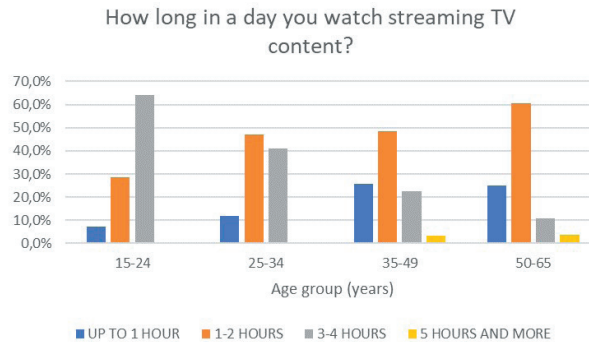


Fig. 11. Use of additional devices while watching television content in different age groups.

phone while the oldest age groups used the phone less and didn't use any other device while watching content.

## Conclusion

This research has confirmed several trends of TV content consumption across different viewer segments. Younger generations watch more and more on demand content on mobile devices. They watch it mostly on their own, on their smartphones, and they use multiple screens at once more than other age groups. Unlike watching on demand content on their own, when consuming linear TV channels on classical TV sets, they watch it together with other family members. This age groups is also characterized by the highest viewing time which confirms the earlier thesis that the new media technologies serve more as an additive than pure replacement to linear content consumption, since the media consumption does not simply zero-sum with the

emergence of new technologies. The usage of multiple screens at once during the consumption of TV content is present across different age groups but more prominent in the younger groups. The oldest age group still shows the highest preference for linear content consumption on TV sets, but also shows adoption of trends regularly attributed to early adopters or younger generations, such as binge-watching TV series. Preference for linear TV channels grows exponentially with the older age groups. It can be assumed that on demand content will continue in its importance across all age groups, however linear TV consumption will keep serving its purpose of being the centre activity in multiscreen living rooms where family member jointly view content on classical TV sets. For further research there is a lot of opportunity to explore in more details how multiple screen usage affect the content consumption preferences and how online sociality is developed in use cases where viewers watch on demand content.

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## **OBRASCI KONZUMACIJE TELEVIZIJSKIH SADRŽAJA NAKON ERE BROADCAST-A - ISTRAŽIVANJE O NAVIKAMA GLEDANJA TELEVIZIJSKIH SADRŽAJA HRVATSKIH POTROŠAČA**

### **SAŽETAK**

U razdoblju nakon ere broadcast-a, koje je je obilježila tehnološka konvergencija, konzumacija sadržaja doživjela je značajne promjene. Taj proces i dalje traje, te su se s digitalnim dobom otvorile mnoge nove mogućnosti za gledanje televizijskih sadržaja na različitim uređajima i u različitim društvenim okruženjima. Uređaji poput pametnih telefona i tablet integrirali su se u obrasce konzumacije sadržaja, te su čak postali i glavni uređaj koji gledatelj odabire za konzumaciju linearnih ili sadržaja na zahtjev. Potrošači migriraju na usluge sadržaja na zahtjev, te se tradicionalni mediji prilagođavaju novim potrošačkim navikama. Neprekidna transformacija publike pokazuje i da se zajedničko gledanje u dnevnom boravku uz korištenje više uređaja razdvaja u gledanje u izoliranom okruženju u više soba jer korištenje digitalnih uređaja postaje primarni način konzumacije sadržaja. Kako bi se razumjeli ovi trendovi koji se vrlo brzo mijenjaju, u ovom radu će se razmotriti različiti aspekti novih trendova potrošnje sadržaja putem kvantitativnog istraživanja. Razumijevanje potrošačkih preferencija u tehnološkoj transformaciji važan je element koji može pomoći produkciji, distribuciji i marketingu televizijskog programa.