

The television consumption journey in different platforms in the Era of Liquid Content¹

A jornada do consumo televisivo em diferentes plataformas na Era do Conteúdo Líquido

Juliana Sawaia*, Fabia Juliasz, Tiago Crippa, Karine Kakazu

Kantar IBOPE Media, São Paulo, SP, Brazil

ABSTRACT

In this era where content is increasingly liquid, TV audience measurement evolution is essential to offer an overall vision from television consumption journey in its different formats, devices and platforms. This study aims to contribute to an understanding of this ecosystem under the viewer perspective as well as illustrate how audience measurement has developed to follow the new media environment. Therefore, the inductive method was used through the review of information collected in different surveys of market companies: LSE, Target Group Index, Television Audience and ITTR.

KEYWORDS: Audience; Liquid content; Measurement; Television.

RESUMO

Nesta era em que os conteúdos estão cada vez mais líquidos, a evolução da medição de audiência de TV é essencial para oferecer uma visão abrangente da jornada de consumo televisivo nos seus variados formatos, *devices* e plataformas. Este estudo se propõe a contribuir para um entendimento desse ecossistema, sob a perspectiva do telespectador, bem como ilustrar como a medição tem se transformado para acompanhar o novo ambiente midiático. Para tanto, foi utilizado o método indutivo por meio da revisão de informações colhidas em distintos levantamentos de empresas de mercado: LSE, Target Group Index, Audiência de Televisão e ITTR.

PALAVRAS-CHAVE: Audiência; Conteúdo líquido; Medição; Televisão.

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*Juliana Sawaia

Master in Business Administration from Business School São Paulo in partnership with the University of Toronto. Currently running Kantar IBOPE Media's Learning & Insights Business Unit.

(CEP 01419-002 – São Paulo, SP, Brazil).

E-mail: juliana.sawaia@kantarIBOPEmedia.com

Address: Alameda Santos 2101, 11º andar, 01419-002, São Paulo, SP, Brazil.

Fabia Juliasz

Finances and Marketing degree from Fundação Getúlio Vargas (FGV-SP). Director of Video Audience Measurement at Kantar IBOPE Media.

E-mail: fabia.juliasz@kantarIBOPEmedia.com

Tiago Crippa

Business degree from School of Economy, Business and Accounting at Universidade de São Paulo.

Analyst in Learning & Insights at Kantar IBOPE Media.

E-mail: tiago.crippa@kantarIBOPEmedia.com

Karine Kakazu

Marketing and Commercial management degree from Business School São Paulo. Analyst in Learning & Insights at Kantar IBOPE Media.

E-mail: karine.kakazu@kantarIBOPEmedia.com

1 CONTEXT

The media ecosystem is constantly changing. The dispute for attention no longer happens only between broadcasters or the different media channels. External factors such as changes in routine and technological development influence the people's entertainment menu as well as the way the people relate to the media. All that makes the competition for attention more and more intense.

New methodologies and formats in audience measurement have been developed and refined by research institutes and the television media market. Concerns on how to measure and make available this data for analysis, as well as the definition of how to use this data to fine-tune programming and reach the audience in its available moment are beneficial for the industry.

Decisions of thousands of Brazilian Reais are taken daily based on the changes of these indicators, cultural preferences of the different regions of Brazil are observed in rankings resulting from these measurements and an entire entertainment industry is dependent on having robust access to this type of information.

For these reasons, an exploratory analysis to understand the measurement of the extended audience is highly important and, with this, both the market and the academy can obtain a more comprehensive view of the television consumption journey.

2 PURPOSE

In view of this moment of transformation in which the media ecosystem is passing through and, in particular, the television consumption with its increasingly liquid content, this article proposes to better understand this scenario through the organization of the different portions that comprise all this new methodology for measuring video content.

As an extension of the technical and numerical aspects of television audiences, it is also important to see how each of this new form of media consumption is linked to people's habits, preferences and attitudes towards media, so that video consumption and attitudinal contexts may contribute to the understanding of the whole transformation process through which the media is passing.

Nevertheless, it is important to clarify that, due to the novelty of the theme as well as the profusion of data, sources and methodologies, the article is exploratory and does not expect to bring results that are exhaustive to the theme, but rather to create a basis on which new studies may remain.

3 METHOD

In order to increase the knowledge about this change in behavior, as well as to understand the new trends and how they influence the TV consumption journey, for this study, the inductive method was used by reviewing information collected in different surveys that are described below.

The Social-Economic Assessment (Levantamento Socio-Econômico - LSE) is the base research for all other researches carried out, since it presents the social, demographic and economic characteristics of the households of the main metropolitan regions of the country.

The interviews are conducted in about 23 thousand households spread across the main metropolitan regions of the country and the selection of these households is statistically performed so that they can represent the populations of São Paulo, Rio de Janeiro, Belo Horizonte, Porto Alegre, Florianópolis, Vitória, Campinas, Goiânia, Curitiba, Distrito Federal, Salvador, Recife, Fortaleza, Belém and Manaus.

The study allows us to size the characteristics of these households, offering consumption habits of goods, services and media, as well as the composition of the population by region, sex, level of education, age, among others.

Target Group Index is the single source study that, in this case, considered the database of the Year16 wave1 + wave2, with 20,736 interviews carried out in the metropolitan areas of São Paulo, Rio de Janeiro, Porto Alegre, Curitiba, Belo Horizonte, Salvador, Recife, Fortaleza, Brasília, as well as in the countryside of São Paulo and the South and Southeast regions. The field occurred between

August 2014 and September 2015. The universe covers people of both sexes of the AB, C and DE social classes aged 12-75. Thus, the study represents 49% of the Brazilian population, equivalent to 81 million people.

The study allows analyzing the scenario and the scope of the new habits of people of different characteristics, besides, when combined with previous years, also permits to analyze emerging and changing habits. For the purpose of this study, a particular focus on the habits related to the consumption of technology products which have a connection with media consumption.

TG.net is the online study done with 2,929 Internet users aged 15-75 in Brazil, merged with the regular Target Group Index for a behavioral approach focused on Internet users. For the purpose of this study, the database of the Year 6 was used between May and July 2015, in the markets of São Paulo, Rio de Janeiro, Belo Horizonte, Porto Alegre, Curitiba and Distrito Federal, as well as the Northeast region, São Paulo countryside and countryside of the South and Southeast.

TV audiences are the measurements of television consumption in both linear and non-linear formats (which are the subject of this study of the new television ecosystem) and originated from the Kantar IBOPE Media National Television Panel (Painel Nacional de Televisão - PNT) from October to December 2015. This panel is composed of residents of the capitals and metropolitan areas of São Paulo, Rio de Janeiro, Belo Horizonte, Porto Alegre, Curitiba, Recife, Distrito Federal, Salvador, Fortaleza, Florianópolis, Vitória, Goiânia, Belém, Manaus and Campinas.

The measurement of the consumption of television content is done by devices called Peplemeters what will be detailed later in the Evolution of Measurement Methods. In the case of linear measurement, the content consumed is considered as it is transmitted by the broadcaster; while in the specific case of non-linear consumption, the contents are measured as explained below.

TSV/VOD – Comprise audiences of on demand content that have been recorded and reproduced within seven days of the original broadcast.

Digital terrestrial television in mobile devices (Transmissão Digital Terrestre - TDT Mobile) - In this case, the measurement is currently performed in São Paulo Metropolitan area with respondents who have phones with the Android operating system. The app installed on the mobile phone identifies the audience through accessibility considering linear audience, ie, the moment of broadcast as on open TV.

Social TV - To understand the phenomenon Social TV was used the IBOPE Twitter TV Ratings (ITTR), a study that allows access to quantitative data regarding the interaction of Twitter users about television content, provided by the social network itself and combined with the TV Audience of the programs mentioned.

ITTR universe covers 100% of the television messages that occur on Twitter, taking into account programs registering criteria created by Kantar IBOPE Media and Twitter. This database includes information from January to December 2015 containing the programming of the National Open TV channels only. Measurement for each program respects a window that ranges from 0 to 180 minutes before and from 0 to 180 minutes after its broadcast.

4 INTRODUCTION

4.1 BRIEF HISTORY OF TELEVISION

Most visionaries who create a product or service dream their business to be revolutionary and impacts people's lives. Few of these have the opportunity to see their initial dream come true. David Sarnoff, RCA/NBC executive and considered one of the pioneers of television broadcasting, says he saw this happen and had it clear when he made his speech in the first broadcast:

It is with a feeling of humbleness that I come to this moment of announcing the birth in this country of a new art so important in its implications that it is bound to affect all society. It is an art which shines like a torch of hope in the troubled world. It is a creative force which we must learn to utilize for the benefit of all mankind. This miracle of engineering skill which one day will bring

the world to the home also brings a new American industry to serve man's material welfare...[Television] will become an important factor in American economic life. (Carsey & Werner, 1998)

Its broadcast, at the end of the 30s, approximately 10 years after the first long-distance transmissions, began an era that, in the words of Sarnoff himself would "affect all society".

In 1950, when the world was still being restructured after World War II, TV Tupi was debuting in Brazil with its first broadcast being made to approximately 200 television sets connected in the country. Over the following decades, other concessions were allowed and new broadcasters emerged, as well as sales and extinction of broadcasters, which was the case of TV Tupi itself that would become TV Manchete in Rio de Janeiro and SBT in São Paulo. This period reiterated TV, in particular open TV, as an important factor in people's lives. National productions gained in quality and became so relevant that they began to be exported to other countries, as happened with *O Bem-Amado*, the first soap-opera to be broadcasted outside Brazil. It then arrived in Uruguay in 1973, in Mexico in 1975 and reached the mark of 17 Latin American countries (Santos, 2010).

This exchange in culture and options had a two-way street and the desire for diversification of content was expressed also in the arrival of Pay-TV in the country in the 90s with Canal +, which offered a five-channel menu. Today, less than 30 years later, the variety of options in the main operators has already surpassed the mark of 70 channels and has grown year over year.

This uprise in options competing for viewer's attention can also be noticed in the broadcast quality improvements of the Open TV with the implementation of the digital terrestrial television, the consumption of television content by other platforms and the video on demand, as will be seen later. In this sense, Marshaw, according to Jenkins (2008, p.9) states that:

Regardless of your relationship with media, you've certainly noticed that it has changed a lot in recent years. The strength of this or any other relationship is determined by the way the involved parties deal with the changes. And, at this very moment, there is a multiplicity of changes going on.

For this reason it is necessary to deepen the understanding of the behavior of the viewer and his television consumption journey in these different formats, as well as to illustrate how the techniques of measurement have been transformed to follow the new media environment.

4.2 EVOLUTION OF TV MEASUREMENT METHODS

In order to keep up with changes in television content consumer habits, the methods used to measure the performance of TV broadcasters also have evolved and adapted over time to fit with the characteristics of consumer platforms and market needs.

The methodology of using self-completion research notebooks, for example, was initially implemented in the country's metropolitan regions in the 70s, according to Almeida, Hamburguer and Aidar (2006). In this "mobile panel" model, the households invited to participate in the survey are selected by statistical methods to represent the population of a region or city. Those who agree to participate remain with the questionnaire for a certain period. In this questionnaire, the residents of the home are asked to fulfill their consumption habits of television programming, such as: times of consumption, broadcasters, quantity and profile of the people who are watching that certain show. Currently, this method is used in regions where there is no continuous measurement of TV audience.

In order to speed up access to information, electronic assessing of TV audiences with the use of perforated tapes was implemented, beginning in the 70s, then passing to telephone data transmission in the late 80s and culminating with internet transmission in the 90s (Santos, 2007) in the main metropolitan regions of the country. In this model of measurement, a sample of households is also statistically selected to represent the entire universe, in this case the metropolitan region, but instead

of receiving the self-completion notebook, the TV sets are connected to the electronic meters called Peplemeters.

These devices have the ability to identify the tuning and the content watched in each household part the sample panel transmitting that data to a processing center where they are audited and statistically extrapolated. Through this technology, developed in Brazil, it is possible to monitor the audience of the shows in real time. Latin America is the only region in the world where this real-time information is made available to the market.

4.3 THE DNA OF A SHOW

But how can you identify which show is being watched? Currently two complementary identification methods are used to guarantee the quality of the process: Channel Grabber and Fingerprint.

Channel Grabber is the method of identifying the TV station by optical character recognition (OCR). The display is read by the decoder or set-top-box, when the device is switched on or when zapping the channels, the characters corresponding to the watched channel are identified.

The Fingerprint is a unique code that classifies the program from the recognition of its content. As the program is watched, this code is reported by the Peplemeter and identified in an audio library, so the audience is assigned to the program. As Buzeta and Moyano (2013) explain, this technology, called audio matching, is independent of the technology and the analogic/digital character of the broadcast. It is also able to recognize what was watched outside the broadcast hours, thanks to a continuous comparison process with the centralized audio database.

This technology has been the main solution adopted in Latin America for audience measurement by Kantar IBOPE Media. This solution meets the need to measure the content independent of its platform or moment of consumption. Some examples: DVR, which records content for later viewing and Video On Demand, a content library for instant access.

4.4 SCENARIO

The world is increasingly chaotic and the consumer's routine more complex. On a typical day, an average person spends about eight hours sleeping, eight hours at work, and two hours in transit. All other leisure and entertainment activities, as well as household tasks, are held in the remaining six hours of the day. Time becomes scarce and consumers find themselves in an environment that demands quick, practical decisions.

In this context, consumer attention becomes fragmented and even more disputed. According to a study executed by the Statistic Brain Research Institute (2015), the consumer's attention span, which was twelve seconds in the year 2000, in 2015 came to be about eight seconds, one less than that of a goldfish. The main factors that impact the level of attention, according to a study of Microsoft Canada (2015), are media consumption, technology adoption, multi-screen behavior and social media use.

Media consumption is a habit rooted in almost the entire population. Among the most far-reaching media are television, watched by 98% of the population, outdoor media reaching 76% and radio and the internet with 68%. It is worth mentioning that internet grew 145% in the last ten years. This expansion contributed to the increase simultaneity in media consumption, a habit that went from 55% to 62% in five years.

The adoption of technological equipment has also grown rapidly in the country. 70% of the population has a computer and 22% have a tablet at home. From 2010 to 2015 the ownership of smartphones has increased exponentially, i.e. seven times and more than half of the population already has access to the appliance.

With the proliferation of devices, consumers have adopted multiple devices. The same person uses different technologies according to their needs. In this way, multi-screen behavior also gains adhesion.

The possession of at least three devices, among television, computer, smartphone and tablet, has tripled in the last three years. Today, 80% of the population of the major metropolitan areas has access to at least two of these devices, as shown by data from the Target Group Index, Kantar IBOPE Media.

With all this diversity of screens available, it is possible to notice that television is unanimous, since virtually all consumers have the device, regardless of the combination of devices they have. According to the study Antropomedia (2014), if television were personified, it would be a family, since it is present in every home and, more than a media, it represents a moment to be shared with loved ones.

Besides the TV sets, the most common device among those who have access to two screens is the computer. For those who have three screens, 95% have a smartphone. The tablet is the fourth screen that completes the cycle, as shown in Figure 1.

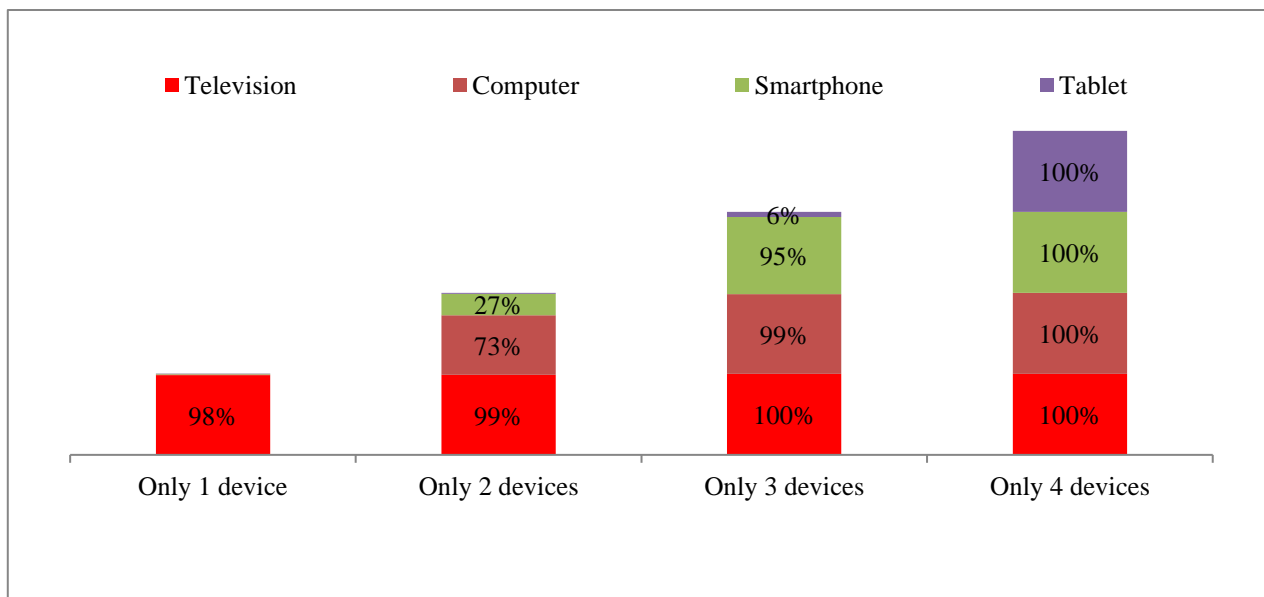


Figure 1 – Device percentage among those who have a mix of 1, 2, 3 or 4 devices
Source: Target Group Index Y16w1+w2, Ago. 2014, Set. 2015.

By combining a variety of devices with the broad reach of the media, the result is a cross-media, cross-platform and cross-screen behavior, that is, media consumption across different media channels, platforms and screens. In this context, viewers have the ability to consume content at any time and place according to their routine, convenience and preference. This behavior also stems from the lack of time allied to the fragmentation of consumer attention.

In this way, time savings can also be reflected in the optimization and empowerment of available technologies. This can be observed, for example, in the devices that now perform different functions. Among the main activities done in the internet, despite of the device, are the consumption of different media and the use of social media. The content accessed on these devices generally follows the same traditional formats of audio, text and video, as shown by the TG.net data shown in Tables 1, 2 and 3.

Table 1
Apps on Smartphone (filter: internet users last 7 days)

Ranking	Apps	Smartphone
1	Social Media	51%
2	E-mail	47%
3	Photos	44%
4	Music	42%
5	Instant Messenger	41%
6	Games	39%
7	Maps	36%

8	Images	36%
9	Videos	36%
10	Entertainment	30%

Source: TG.net Ano 6, 2015.

Table 2
Apps on Tablet (filter: internet users last 7 days)

Ranking	Apps	Tablet
1	Social Media	32%
2	E-mail	29%
3	Games	29%
4	Videos	27%
5	Photos	26%
6	Music	24%
7	Map	24%
8	Images	23%
9	Books	22%
10	Instant Messenger	19%

Source: TG.net Year 6 (2015).

Table 3
Activities done on computer (filter: internet users last 7 days)

Ranking	Activities	Computer
1	Social Media	89%
2	E-mails	71%
3	Personal search	56%
4	Price Comparison	52%
5	Listen to music	50%
6	Bank services	48%
7	Video	47%
8	Personal shopping	46%
9	Maps, routes, addresses	46%
10	National News	45%

Source: TG.net Ano 6, 2015.

Data also show social media top ranking among mobile apps. The high use of these networks can be explained, in part, by the fact that people have the desire to socialize by essence and these sites/apps are intended to promote interaction between people, as suggested by Telles (2010), allowing the user to be accompanied by others all the time, even if virtually.

Social media are part of media channels that allow sharing information and media content with various people around the world. Video content is observed to be highly relevant content for internet users in social networks, 65% of them use this environment to view photos or videos.

Video content stands out for its attractive format, since it can send a quick message because it consists of simultaneous image and audio. According to a study conducted in 2015 by Cisco, video consumption will account for 80% of the internet data traffic in 2019.

5 VIDEO CONSUMPTION

This dynamic environment allows to align a triad between mobility, availability and experience in video consumption. It is the passage from the Content Age to the Context Age, in which the consumption of the same content can occur in different places, characterizing a unique moment according to the context.

According to Scolari (2014), this new configuration of video is defined as "hypertelevision", since it represents a "specific configuration of the socio-technical network around the television media", that is, the television is taken to other environments, but its essence is the same as of television media.

In this configuration, the programs are adapted to some characteristics, such as multiplication of narrative programs, with several characters and different stories in the same program; screen fragmentation, modularization of information; rushing of stories, as demanded by this consumer fragmented attention; narratives in real time, without post-production; non-sequential stories and narrative expansion, not only linear, but also transmedia.

However, it is possible to understand that, among all the forms available to consume video, the television watched in the traditional television set, present in the room or in the bedroom of the homes, is already consolidated in the life of the Brazilian. Ninety-nine percent (99%) of the population owns a television set at home and the purchase conversion rate in the last year was 60%, ie the number of people who bought in 2015 was 60% of those which intended to buy in 2014, according to the Target Group Index.

Viewers on this device are more active year after year. Figure 2 shows a growing trend in the average daily time spent watching content on this device; from 2010 to 2015, total growth was 13%.

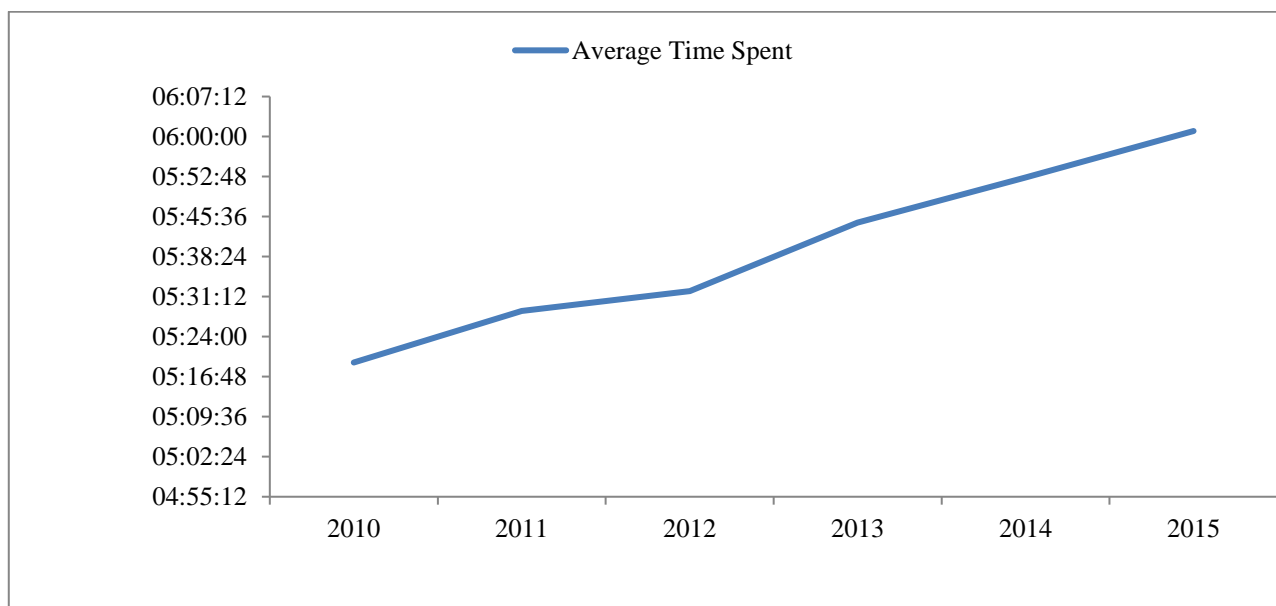


Figure 2 – Average time spent in traditional TV set by tv viewer
Source: Media Workstation. Painel Nacional de Televisão, 2015.

In addition to this traditional day-to-day television consumption, there are new technologies in the market to meet the need for flexibility of time and place.

Among the formats present in the market to adapt to the available time of the consumer there is the video on demand or on demand (VOD), made available by Pay-TV providers or online services. In this format, users are able to watch content at any time and from different platforms, according to their convenience. Information obtained through the Target Group Index survey from Y16w1 + w2 database show that in the main metropolitan areas of Brazil, 17% of internet users or Pay-TV viewers used this kind of service in the last 30 days.

Another way to consume video is by recording programs to watch at different times from the original broadcast. Still according to the Target Group Index survey, this feature is used by 7% of Pay-TV viewers and 4% of those who watch open television.

In order to record the content, it is possible to use the recording device, called DVR, connected to the TV set, a TV that already has its own recording feature or through the decoder or set-top box of the Pay-TV providers, this last form is used by more than a third of those who usually record.

These forms of consumption, VOD and program recording, are called Time Shifted Viewing (TSV), that is, consumption of television content at a different time than originally broadcasted.

In the mobility aspect, it is worth mentioning the consumption of television in mobile phones, through digital terrestrial television. The technology available on this screen enables to watch real-time television from anywhere. The rate of usage of this technology among those with a smartphone is 33%, that is, 19% have access to mobile television transmission and 6% of those use this feature.

Another possibility to amplify the experience of consumption of television content is live or stored streaming. Data from the Target Group Index survey reinforce that, in Brazil, the habit is more common on larger screens. Among the 4% of internet users watching online television programs, 47% do it by notebook, 37% by desktop, 30% on smartphone and 8% on a tablet.

In addition to enabling new forms of video consumption, the new technological devices, combined with the expansion of the Internet, favored the simultaneous consumption of media and social interaction. About 40% of the population regularly accesses the internet while watching television. Of these, 32% usually comment on what they are watching on social networks, a phenomenon called Social TV.

Video consumption data shows that the use of other devices, besides the traditional television, has been adopted first by specific portions of the population, that is, those with more affinity with technology. However, the potential for growth and expansion is high in view of the rapid technological adhesion.

The new models of video consumption demanded the expansion of the forms of measurement of audience, since it is important to follow the behavior of the consumer wherever he is to understand the development of this journey from his habits and contents consumed.

5.1 CONSUMPTION HABITS

A journey can be related to a route traveled in a day, a trip, a day of work or an event, as it appears in the dictionary Houaiss and Villar (2009). The journey described in this study refers to the first definition, more precisely to the possibilities of contact with the television content, in different platforms and devices, during a day in the life of the consumer.

Thus, to adapt to consumer needs and their various assignments on a typical day, some of the new video consumption formats enable viewers to watch content outside of the broadcasting times. However, as discussed earlier, the total time available on a typical day for entertainment activities tends to be concentrated at night time. This can be considered the "primetime", not necessarily TV's, but the person's primetime.

Figure 3 shows that traditional television consumption is concentrated between 9:00 pm and 11:00 p.m., when the viewer has arrived home after his daily activities.

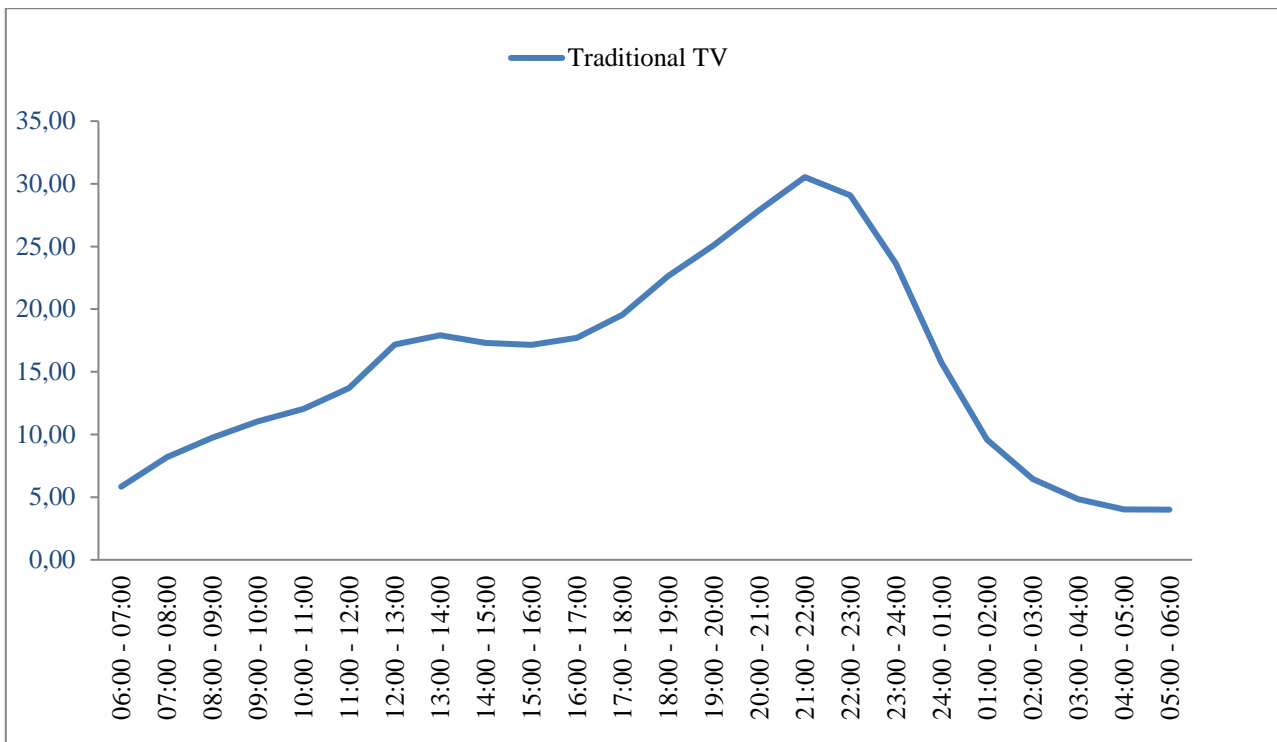


Figure 3 – Video Consumption throughout the day (National Television Panel - PNT)
Source: Media Workstation. Painel Nacional de Televisão, 2015.

Analyzing the times in which the viewers usually watch contents on video on demand and time shifted viewing, it was verified that its prime time is very close to the traditional television’s one.

Figure 4 shows that television consumption peaks occur between 9:00 p.m. and 11:00 p.m. in both traditional television and TSV/VOD formats, considering the total population. These data reinforce the concept of "person primetime" mentioned above.

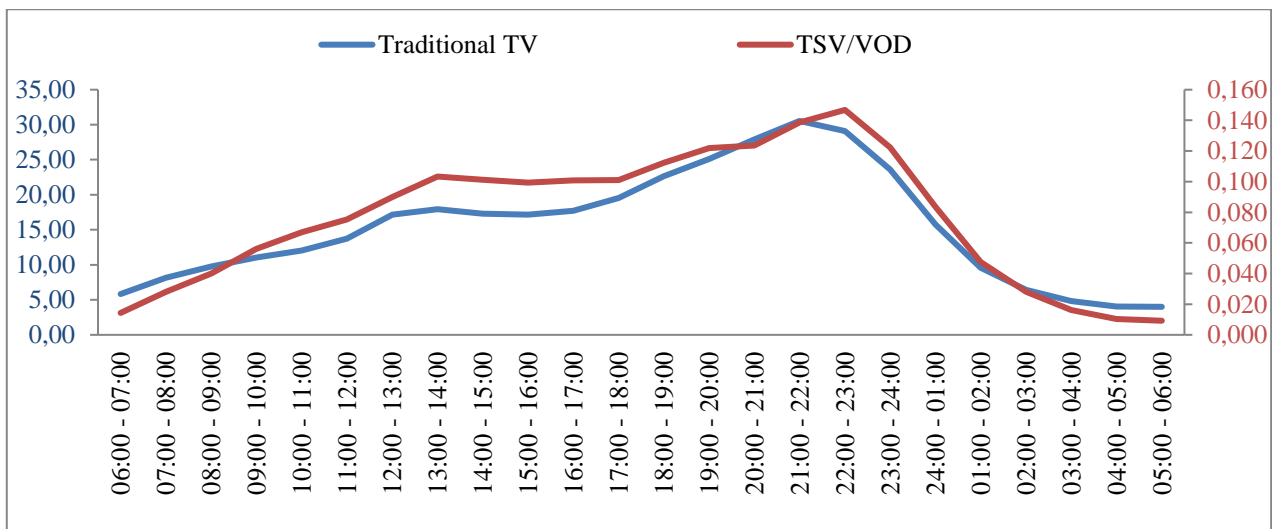


Figure 4 – Video Consumption throughout the day (National Television Panel - PNT)
Source: Media Workstation. Painel Nacional de Televisão, 2015.

The same trend is observed in São Paulo Metropolitan Area, even though the habit of consumption of recorded content and VOD shows a slight difference, with a more pronounced emphasis during the afternoon (Figure 5).

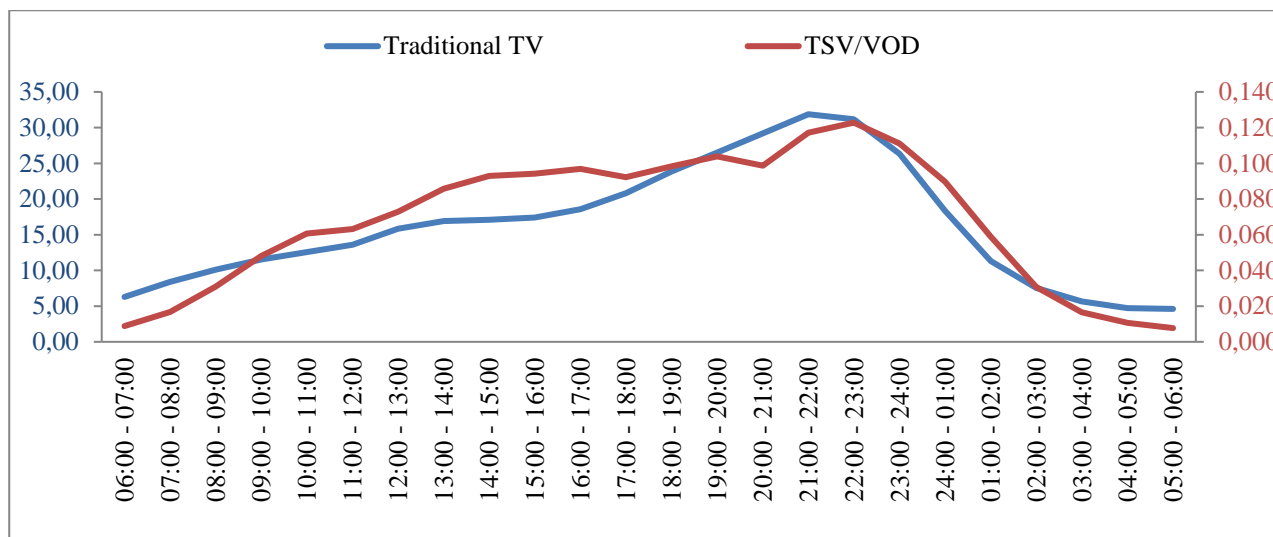


Figure 5 – Traditional Video Consumption throughout the day (São Paulo Metropolitan Area - GSP)
Source: Media Workstation. Grande São Paulo, 2015.

However, the consumption of digital transmission in mobile devices shows a peak at lunch time (Figure 6), when consumers tend to be available for consumption, mainly outside the home.

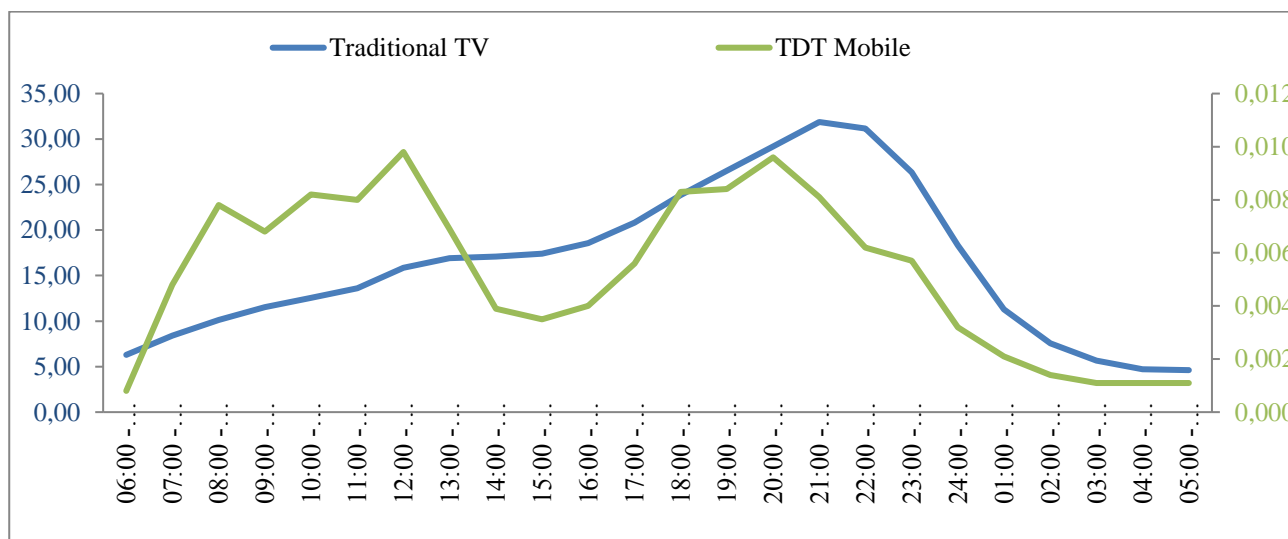


Figure 6 – Traditional Video Consumption and Digital Terrestrial Television in Mobile throughout the day (São Paulo Metropolitan Area - GSP)
Source: Media Workstation. Grande São Paulo, 2015.

Observing the average time spent on digital terrestrial television in mobile (Figure 7), it is possible to note that viewers watch a few minutes on the platform with varied peaks throughout the day when compared to traditional television consumption. This type of habit can be characterized as a snackable behavior, that is, consumption of fast content and in small portions.

This behavior may be related to the fragmentation of attention, as well as to the short intervals available between consumer appointments which only allow rapid consumption of media. Thus, in order to reach this audience, the ideal content for these moments would be short and objective.

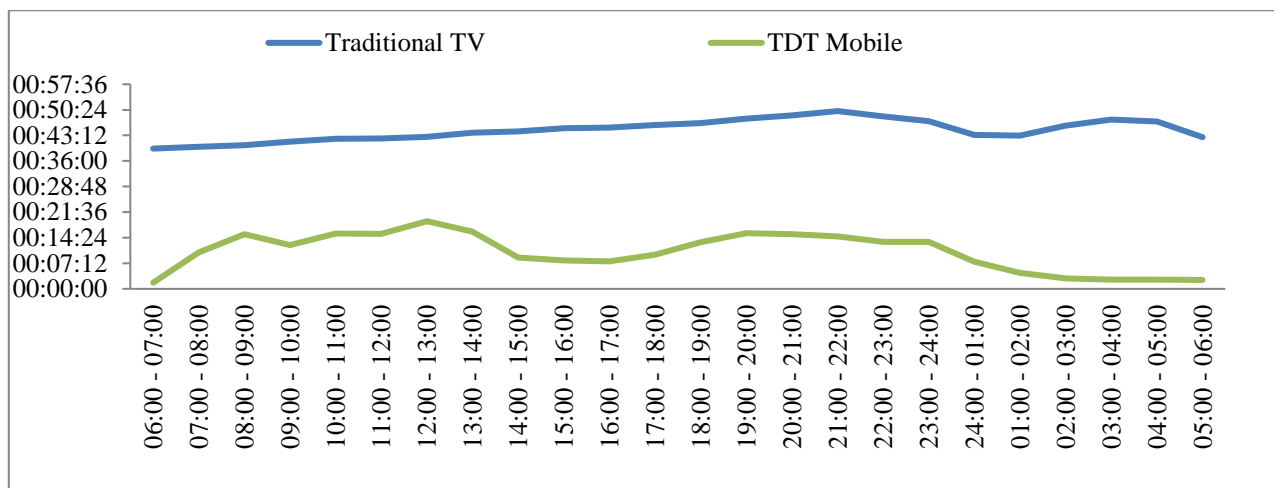


Figure 7 – Average time spent on Traditional Video Consumption and Digital Terrestrial Television in Mobile throughout the day (São Paulo Metropolitan Area - GSP)
Source: Media Workstation. Grande São Paulo, 2015.

The days of highest consumption of the TSV/VOD formats (recorded or video on demand), outside of the original broadcast time, are Saturday and Sunday. However, it is possible to note that weekend-watched content does not originate from those days; They tend to be originally broadcasted mainly on working days, when there is less availability of time by the viewers, as shown in Figure 8.

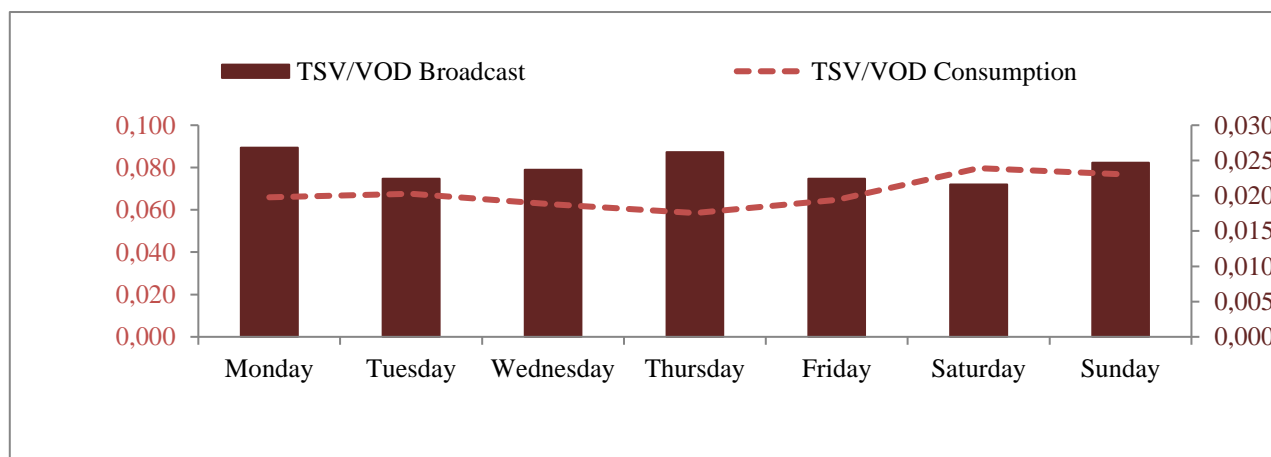


Figure 8 – Average of Consumption and Broadcasting of TSV/VOD data throughout the week
Source: Media Workstation. Painel Nacional de Televisão, 2015.

Throughout the day, viewers have the possibility to access social media, main apps/sites used in mobile devices, as mentioned earlier. About 40% of internet users access these networks five times or more a day, according to the study TG.net.

Among these accesses, those that occur simultaneously with television consumption support the phenomenon Social TV, which is part of the viewer's journey, since they can influence the habit of media consumption.

According to the Public ITTR, ranking published weekly by Kantar IBOPE Media with ten open television programs that generated more impressions (views of the posts), Sunday is the day when more programs stimulate the interaction of Twitter users, once it was the day of the week that most appeared in the rankings in 2015.

However, the day with the highest buzz in this social network was Tuesday (Figure 9). The difference in this case falls in the fact that there is a greater variety of shows on Sundays that awake interest in Twitter users, even if the volume of messages is reduced. On the other hand, the

effectiveness and commitment of the users to the shows of Tuesday are greater, because despite the smaller number of commented programs, the day has reached a greater volume of tweets.

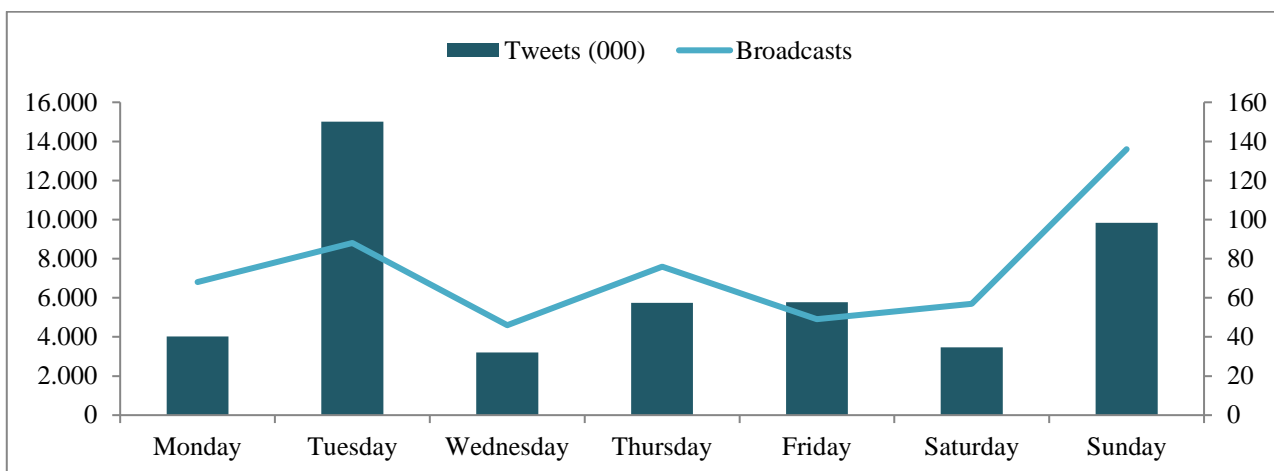


Figure 9 – Total tweets and broadcasts ranking weekly top 10 in 2015
Source: Public ITTR, Jan.-Dez., 2015.

6 TV VIEWERS PROFILE

When looking at the demographic profiles, it is possible to notice some aspects already indicated by the consumption curves. TSV/VOD tends to be consumed by people younger than the average viewer and TDT Mobile by people in economically active age groups who tend to stay away from home (Figure 10).

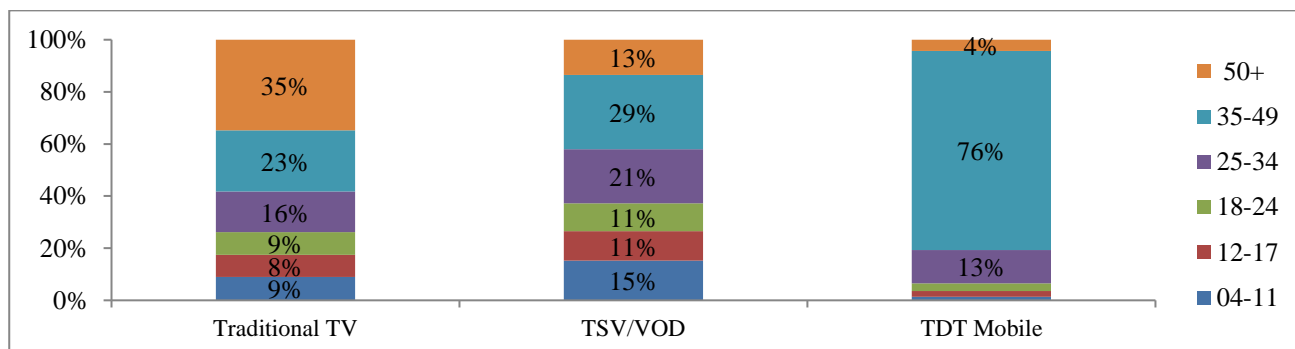


Figura 10 – Age distribution for Traditional TV, TSV/VOD and TDT Mobile
Source: Media Workstation. Painel Nacional de Televisão, 2015.

In a psychographic approach, users of these formats already tend to be up to date and well informed regarding electronic equipment. It is noteworthy that these consumers also have affinity with the simultaneous consumption of television and internet and with the habit of commenting shows in social media, according to Figure 11.

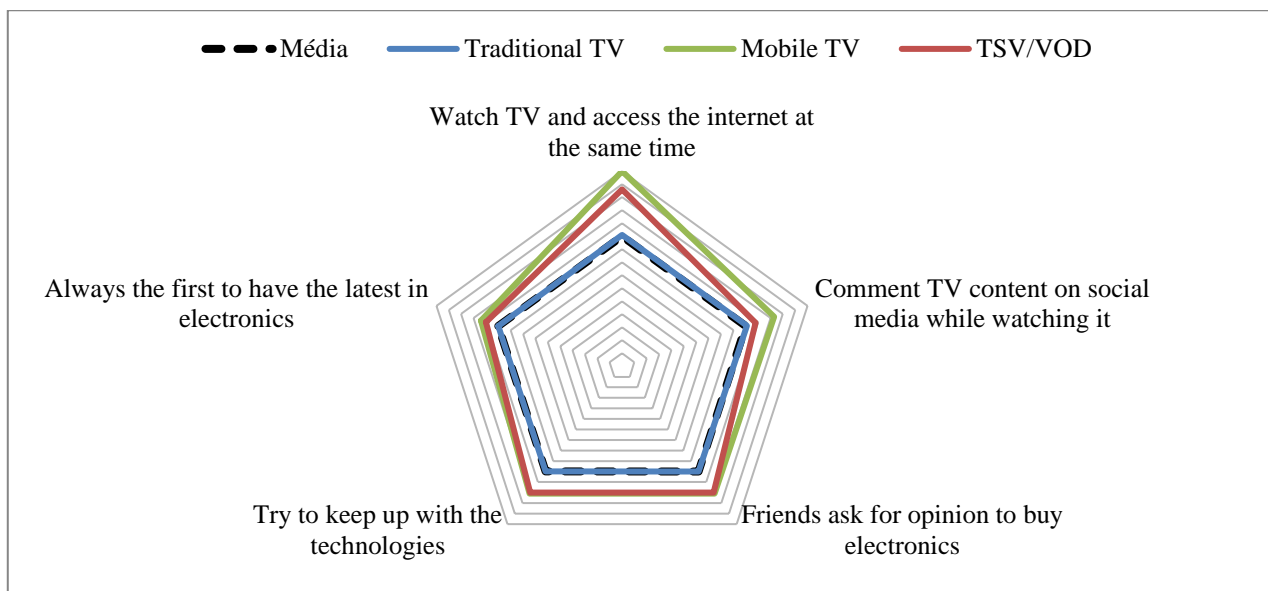


Figure 11 – Affinity of those who consume Traditional TV, Mobile TV and TSV/VOD with who agrees on some Technology e Media sentences
 Source: Target Group Index Y16w1+w2, Ago. 2014-Set. 2015.

6.1 CONSUMED CONTENT

In order to deepen the understanding of this journey, the content is essential, since it is what will determine if it is worth concentrating the viewer's efforts, even at appropriate times and places, with its scarce time and fragmented attention.

The national genre audience ranking varies when comparing traditional consumption (Table 4) with TSV/VOD (Table 5). The Comedy and Children shows, which can be considered of high perpetuity, that is, the content does not necessarily need to be consumed at the time of broadcast, are among the ones that go up higher in TSV/VOD positions.

Table 4
 Ranking of genres in traditional consumption

Position	Genre	Rat% traditional
1	Soaps	3,96
2	Talk Show	2,37
3	Variety Shows	1,41
4	Lottery Draws	1,00
5	Game show	0,77
6	Rural	0,75
7	News	0,72
8	Female Interests	0,57
9	Health	0,52
10	Comedy	0,33
11	Documentary	0,26
12	Late-Night Talk Show	0,25
13	Reality Show	0,24
14	Learning	0,24
15	Children	0,21

Source: Media. Media Workstation. Painel Nacional de Televisão, 2015.

Table 5
Ranking of genres in TSV/VOD consumption

Variation	Position	Genre	Rat% tsv
	1	Soaps	0,0043
+8	2	Comedy	0,0013
	3	Variety Shows	0,0010
-2	4	Talk Show	0,0006
+8	5	Reality Show	0,0005
+9	6	Children	0,0004
	7	News	0,0004
+1	8	Health	0,0002
-1	9	Female Interests	0,0002
+1	10	Documentary	0,0002
-6	11	Game show	0,0001
-8	12	Lottery Draws	0,0001
-7	13	Rural	0,0001
-2	14	Late-Night Talk Show	0,0001
-1	15	Learning	0,0001

Source: Media Workstation. Painel Nacional de Televisão, 2015.

The broadcasts of soccer matches are content of low perpetuity, that is, if they are not watched in real time, they may lose part of the value to the viewer, who will already know the result of the match and will not have the same interest to watch. In Figure 12 it is possible to notice that the traditional audience of this genre is high, however the in the 360 audience is not that representative. On the other hand, reality shows and soaps are shows with social and engaging characteristics, since their higher reaches provide interaction between viewers in different social environments, as well as demand a regular tune in, in which the consumer watches all the episodes in chronological order. Therefore, the viewer can seek to watch the content that has already been broadcasted through recording or VOD in order to be up to date with the episodes to come. In Figure 13 these two mentioned genres stand out in traditional audience and 360 audience in São Paulo Metropolitan Area.

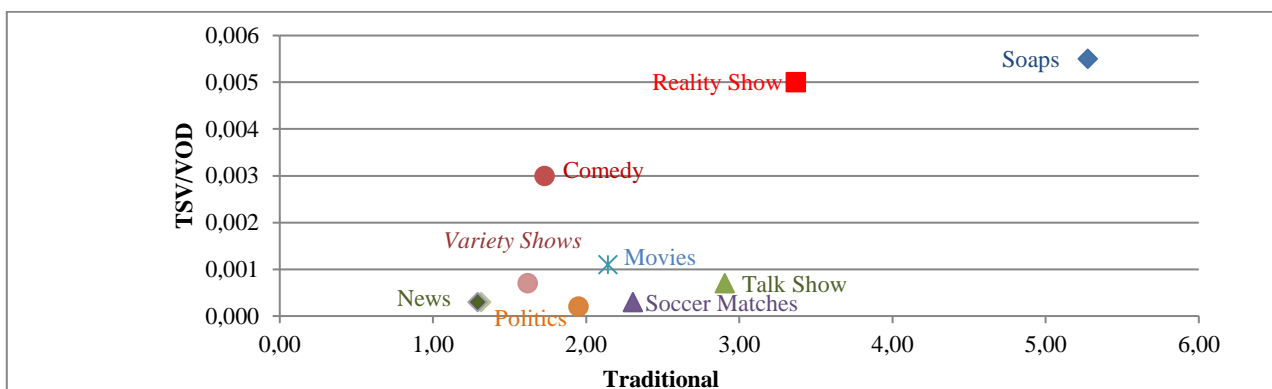


Figure 12 – Traditional Audience x TSV/VOD
Source: Media Workstation. Painel Nacional de Televisão, 2015.

The social question and sequential can also explain the fact that both genders are also on DTT Mobile (Figure 13). When possible, the viewer looking for follow that kind of content in real time wherever he is on the screen available at the time of the exhibition. It's worth mentioning that in this format, the genre audience also stands out.

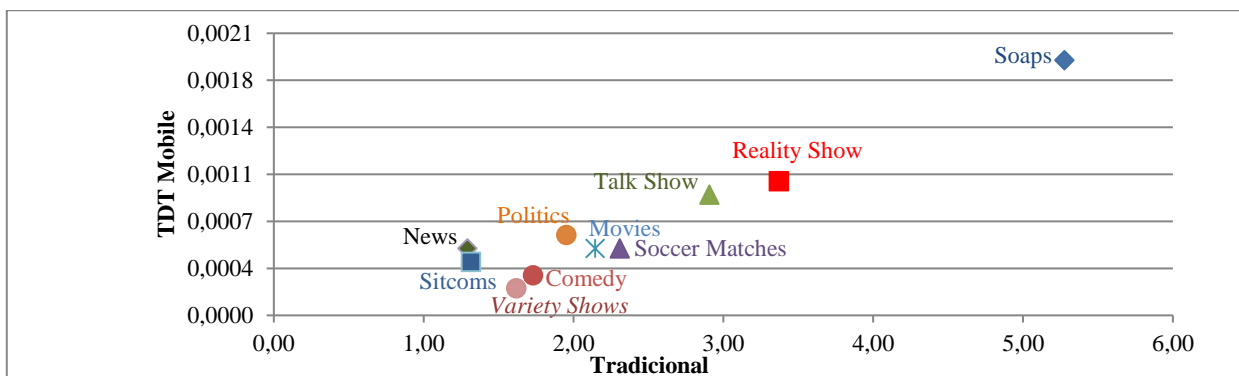


Figure 13 – Traditional Audience x Digital Terrestrial Television in Mobile
 Source: Media Workstation. Painel Nacional de Televisão, 2015.

The social aspect of low perpetuity programs is also reflected in social media. The genres that most figured in the ranking of Public ITTR throughout 2015 were again Reality Show and Soaps, as indicated in Table 6.

Table 6
 Top 10 most mentioned genres

Genres	Broadcasts
Reality Show	156
Soap	95
Talk Show	93
Comedy	68
Sitcoms	52
Variety Shows	26
Short Sitcoms	10
Musical	8
Movies	5
Especiais	2

Source: Public ITTR, 2015.

Among the total tweets of the year 2015 in Public ITTR, reality shows accounted for 30%. The final of the MasterChef Brazil, Reality Show broadcasted by TV Band, was the single broadcast with the largest number of impressions, 81.7 million, which made the program a phenomenon of Brazilian television. In total, all the broadcasts reached 7.2 million tweets and 361 million impressions.

Part of this success can be attributed to the fact that the channel encouraged the use of the social network throughout all episodes and in the last one revealed the name of the winner, first on Twitter and then on live broadcasting.

Gradually the market develops new ways of using the various technological tools available to dialogue with viewers and to adapt to the complex routine of the viewer.

7 TRENDS

Challenged with these constant changes, the scenario faces a constant renewal while technologies evolve exponentially. In the same way, consumer behavior, influenced by these changes, goes through transformations in the way of consuming media. Monitoring these technologies and how they influence the routine of this consumer is essential.

Among the trendy things to keep track of viewers' habits is the measurement of streaming content on the computer. As mentioned earlier, most internet users who watch videos over the internet do so through the notebook or desktop. To follow this trend, the same methodology presented for other devices, the Fingerprint, will be used, by audio, to identify the content consumed in these devices.

Return Path Data (RPD) refers to the method of collecting information about the television consumer habits of Pay-TV subscribers using the data stored in the PayTV provider's decoder. The RPD is one of the clear examples of Big Data for the next years because the information collected is extremely grainy and covers the entire user base that has a device with the ability to return that information to the provider's central database.

Given the right proportions, this process makes it possible to obtain almost a census of the television consumption within the PayTV providers, bringing in-depth information even for niche programs that in sample panels often do not obtain results, so-called "traces" in audience, which means "zero" audience.

According to Paul Ruston, executive at Kantar Media who has been working on the topic for more than 10 years, the main benefit of this technology, by bringing this greater volume of information, is to enable knowledge on subscribers' habits and preferences through the most watched channels, resulting in better targeted ads to viewers according to the profile of each person, suggested by the consumption history, according to an interview published in 2015 by the newspaper Propmark Special for Pay-TV.

This model cited by Paul Ruston is called Addressable TV, which allows the targeting of certain ads to segments of the television audience, such as geographic, demographic, behavioral groups and even a specific household, through the reception of cable, satellite, internet and set-up-boxes. In this way, television lines with the Internet advertising buying model called programmatic.

Programmatic is such a new topic that the learning curve of market experts is still in the ascendant phase. Research conducted by ANA/Forrester with professionals of the environment showed that only 23% of these understand and make use of it and another 67% vary between knowing only the concept and having no knowledge about the subject (Whiteside, 2014).

However, for the purpose of this article, we may consider the definition used by IAB Europe for programmatic as "consider the use of programmatic as a technology to improve the efficiency and effectiveness of Internet advertising; Helping advertisers reach their target audience and vehicles monetize their inventory to the best of it".

In the same ANA/Forrester survey previously mentioned, it is observed that 76% of professionals believe that programmatic can significantly contribute to better reach their target audience. The study also showed that programmatic is still mostly used in the online field and that only 13% of the professionals interviewed had used the model for buying TV media.

Reaching the target audience more effectively means not only cost savings, but also increased brand awareness and, of course, a direct and effective impact on sales. In order to reach this target audience, professionals have sought solutions to better describe who they are, as has happened in Brazil with Kantar IBOPE Media TGR, the solution that aggregates consumer habits information to TV audience information, resulting in a behavioral target.

It is possible to understand the behavioral target through the evolution of the TV audience measurement, which began as of households, became individual and today comes to behavioral. For the household audience analysis, the Gross Rating Point (GRP) is used, which counts the sum of the gross audience. To measure the individual audience, the Target Rating Point (TRP) is a metric that makes it possible to sum a specific target's audience based on demographics. The new way of analyzing the behavioral audience is done through the Behavioral Rating Point (BRP), made available by the TGR, which goes beyond the demographic data and counts the audience sum for a specific behavioral group.

8 RESULTS

Despite the differences in the format of video consumption and the place where it can be consumed by the viewer, it was observed, through the surveys that, in fact, all these new formats that compose the television ecosystem end up by following a basic premise which is the limit of time that each person has for their leisure and entertainment. When observing the curves of consumption of television content in the different formats, it stands out the fact that they all follow a temporal pattern

whose peak occurs in the night band. In the case of mobile consumption of Digital Terrestrial Television, consumption around the noon range also begins to be drawn as a strong trend.

This strong relationship between the available time of each person and their TV consumption can also be observed in the recorded contents, since the surveys showed that there is a inclination for people to watch the contents recorded on weekends, even if the original broadcast of these recorded programs tend to be during weekdays, corroborating for people to balance their interest in TV at the time they are most available, ie on weekends. This phenomenon of consuming recorded or on-demand content in large quantities at one time has been called binge watching.

As expected, the new models of consuming television content have greater adherence among the younger audience, but data shows that it is not an exclusivity of the age factor, but also an influence of the digital inclusion that people are passing through. Data shows that these publics that consume content in the different formats are those that also tend to the simultaneous consumption of TV and internet, for example.

The programming genre has also proved relevant in the surveys to lead the content to be more or less consumed within each spectrum of this new television ecosystem. Often the content will be consumed in small portions, known by the market as snackable content. In the case of Social TV interactions, it has been observed that the number of times a channel's show is mentioned is not necessarily linked to the number of broadcasts, but rather to the public engagement characteristic each show has. For this reason it was observed that the number of mentions on Tuesdays was higher than those on Sundays, the day with the greatest number of broadcasts.

The surveys showed that certain content, such as Soaps and Reality Shows, end up inducing viewers to look for ways to follow their broadcasts and, for that reason, the mobile consumption of these contents are higher. For fear of losing content, the person will look for the screen available at the time of the broadcast.

The relevance of content against the way it is consumed was also clearly observed with Soccer Matches genre, which is among the largest in traditional linear consumption and is very low in recorded consumption. This, in fact, makes all sense, because this type of content, called low perennial, has to be consumed at the time of its broadcast, otherwise results can be seen in other places and, with that, any interest in watching it will be lost.

9 CONCLUSIONS

In this environment of constant transformation, the present study proposed to create a sedimentary base so that there is an understanding of the phenomenon of liquid content in the consumption of television content.

In this way, the final understandings of the importance of each person's available time for their entertainment and information when consuming video and how much the genre of each show influences the format to be chosen to consume videos demonstrate that the proposed goal was actually reached.

In particular, it is considered that opportunities have been opened for in-depth studies in each of these areas of consumption both in terms of technology and in terms of consumption behavior of viewers.

The expansion of access to these new formats over the years by consumers as well as a greater amount of data accumulated by research institutes and media companies will certainly also contribute to a better understanding of the phenomenon over the next years.

10 LIMITATIONS, SUGGESTIONS AND CONSIDERATIONS FOR FUTURE RESEARCH

Once this is an emerging issue, the amount of data on the actual consumption of television content on the different platforms has shown to be still limited. Although this fact, in no way, is demerit for the results and conclusions presented in this study, other aspects and deepening approaches were no longer addressed as a result of the restriction of information at the moment.

Delving into possible consumption differences between regions of the country, as well as unraveling a whole line of analysis about all the reasons why show genres are influencers in the format of consuming content are opportunities that open up for future research.

Nevertheless, in such a dynamic scenario, there is also a need for update from time to time, since the consumption habits of viewers can change over time and also the increase in data over several months and years of consumption can bring new knowledge through this robustness of data.

11 FINAL CONSIDERATIONS

The changes in the television consumption ecosystem are evident and therefore the initiative to put a whole myriad of knowledge on the theme, organized in a single plot through this study.

Still worth mentioning that this content is increasingly liquid and its consumption can occur on different platforms, at different times and according to the needs of the viewer; in this way, framing media technological advancements based on the behavior of its consumers viewers. Giving this due relevance to people's habits, preferences and attitudes is paramount given the ethnographic understanding of media consumption in modern society outlined by Jenkins (2008).

In this competitive environment between consolidated companies and new entrants, having information is also, having power. Therefore, it is still difficult to have access to some data of these companies and, when it is accessible, the data are often not representative of the whole universe, but only of its own clients or viewers. Having access to research institute databases allowed to deepen the analysis and make temporal comparisons to find trends.

The results obtained after the analysis of the surveys showed that time has a strong influence on the emerging behaviors, in this way, new consumption trends such as binge watching and snack content do not arise due to the imposition of the means, but to meet the basic premise that is to be flexible to the time that each individual has to consume their contents of interest.

The growing importance of Social TV interactions, not only focusing on the number of viewers who engage with the show, but also to influence the outcome of contests and to direct, for example, the future of the plot of a soap-opera, also draws attention to the fact that there is an expectation that TV will be more interactive, personalized and diversified. It is the Age of Hypertelevisión advocated by Scolari (2014).

In this way, it is observed that, each platform, instead of competing with the traditional formats of video, plays a role of expanding its consumption. This also contributes to the realization that television still occupies a prominent position in the media ecosystem, so that, instead of diminishing in importance, its role was re-signified and its power to reach people through the creation of content, amplified by the new platforms and accesses.

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