

Six New Ways of Viewing Television

CONSUMER DIGITAL FUTURE OF TV

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The internet has transformed the way TV is being watched. But while the majority of people use it to augment their traditional viewing habits, a few have discarded their television sets altogether.

Technical evolution, new social models and new business models are creating an increased flow of video consumption away from traditional TV and towards new types of media experiences. If the original way of watching TV was 'lean-back', or 'Sofa TV', then new ways of watching TV via different platforms and multiple screens have added multiple ways of consuming video content.

This has had a major impact on the world of TV: the TV schedule is no longer the dominant structure that controls how and what we watch. Publishing and business models are

rethought from inside the media industry and, as a consequence, the media chain has become longer. TV's 'tail' – as defined by Chris Anderson – is getting longer, creating competition for share among new market players.

How will viewers respond?

The way viewers consume and interact with programmes and platforms will change in six key ways:

1. TV sets and television: catch-up TV is already here

Catch-up TV is already mainstream: 91% of the internet population watch traditional TV during a 30-day period and 70% use some other source of video supply, such as video streaming, downloading, peer-to-peer, videos archived on computers or mobile devices.

2. The internet doesn't replace TV it integrates it.

Traditional TV consumption will never be totally replaced by audio-visual consumption on the internet or through other devices. About 64 % of people watching TV in a traditional 'lean-back' way or via some new consumption mechanism are in fact the same individuals. The different modes of consumption simply represent different moments in their everyday lives. Traditional TV consumption and new TV consumption are complementary and the combinations simply result in more active viewers: The consumers watch programmes for the first time and, then, watch them again online. Or the consumers might passively follow the TV schedule but comment actively online.

The traditional Sofa TV viewers only represent 30% of the internet-enabled population. 64% of the population already consume both traditional 'Sofa TV' and Catch-Up TV. The remaining 5% don't watch any kind of traditional TV anymore.

3. User video: popular culture drives creation and consumption

Some years ago it was predicted that the internet would be invaded by user-generated content. This prediction needs to be revised. The circulation of user-generated material stems from (and chiefly depends on) the vast amount of content created by the established

content providers, both in the form of clips recorded from the established productions, comments on the content, parodies, remixes and mash-ups.

Truly alternative content is limited to 'viral' phenomena, which aspires to achieve five minutes of fame in established media titles with niches of highly evolved consumers.

4. New consumption styles: snack, revideo, premium

Consumers are accessing new audio-visual platforms and content in three key ways:

- **“Snack” consumption:** Representing an audio-visual diet integrating traditional TV and traditional content with material mainly coming via traditional TV but also retrieved and structurally dismantled through new platforms: YouTube, for example.
- **Revideo or catch-up consumption in its strictest meaning:** Representing an audio-visual diet that is less impulsive and retrieves video materials from the established online platforms of publishers (not just TV broadcasters). The content consumed is related to the TV schedule – often only available for viewing for a limited time after the traditional broadcast – or is related to themes that attract a lot of public attention.
- **Premium consumption:** Representing an audio-visual diet made up of high quality content, that can be accessed in a flexible manner thanks to a paid-for offer.

5. It's not about the platform: content drives consumption

Future conversations about media must be led by content not by the means of reception. Because consumers can satisfy their need for content and related information from so many sources, the content they seek has to be considered the driver in most cases.

Nowadays, a viewer with an average level of digital competency can find video news on traditional TV on online news sites, on news aggregators on the internet and even on their smartphone.

6. New generation viewers disappear from the sofa

More than 5% of the internet population are not watching traditional TV at all anymore. This is creating an emerging group that consumes video content solely from alternative sources, not from traditional TV.

Source: Catch-up TV, Italy 2010

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