Young Audiovisual Audiences in Colombia: Under the Veneer of Fragmentation and Multiscreens

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The first decade of the 21st century redefined the traditional ways for audiovisual communication distribution. The digital boom has brought a relevant multimedia transformation, characterized mainly by mergers between traditional and new media companies, new global media markets, new digital devices, new digital content and a new audiovisual culture that has combined traditional and new screens (Albarran, 2010). All this transformation occurred in only one decade has also provoked a new configuration in terms of audience responses.

Even traditional media such as radio and television have explored new windows for distribution thanks to the boom of digital and convergent communication. Nowadays, audiovisual content is not only on the Internet. Gradually, it has migrated to cell phones, video consoles and personal digital assistant devices (PDA´s) among others, mainly in urban areas.

On the theoretical framework there is a transition from the mass audience concept to the interactive media user (Livingstone, 2003). From the traditional segmentation of audiences to fragmentation (Webster, 2005), even the erosion of audiences (Turow, 2010). As Denis McQuail remarks: "The media has increasing difficulty in identifying and retaining "their" particular audience… Patterns of media use will simply be a part of varied and changing lifestyles" (McQuail, 1997, p. 23).

This dynamic process has become pretty common in developed media markets like the United States, Western Europe, and Far East. But what has been happening in developing media economies?

This has been the theoretical framework that inspires the research about audiences behaviors and consumption habits at the Media Observer (*Observatorio de Medios*) of the Communication Faculty at La Sabana University in Colombia since 2007, mainly among children, adolescents and youths who represent more evidently the new configuration about the new habits for audiovisual consumption under the veneer of multi windows and multi channels (Arango Forero & González Bernal, 2009).

This article is aimed to answer one key research question: What are the characteristics of “the new audiences” regarding audiovisual consumption, mainly among young people between 17 and 24 years old who live in the ten most important urban areas in Colombia? This paper will be focused on answering that question based on three main topics:

- In terms of audiovisual consumption habits
- In terms of content preferences
- Considering traditional and new technological consumption

By the end of 2010 Colombia continued to be the third most populated country in Latin America after Brazil and Mexico, and the second largest in terms of Hispanic population worldwide after Mexico. According to the estimates of the Department of National Statistics (DANE), by the end of 2010 around 80% of Colombians were living in urban areas, and the population reached 45.5 million (DANE, 2007).

In terms of telecommunication services by 2010 there were 42 million active cell phone users in Colombia, representing over 93% of the entire population. Despite the large numbers, mobile telephony in Colombia remains a market largely limited to basic service provision, mainly voice and SMS (Arango Forero, Arango, Llaña, & Serrano, 2010).

In the case of television, by 2010 the average number of households –following the Latin American definition– with pay television model was estimated at 40%. However, Colombia had the second largest pay TV market in the region with a penetration of 77% of households (69.5% in the low-income bracket, 81.6% in the middle-income bracket and 89.2% in the high income-bracket). Argentina remained number one in the region with an average of 79% of households with pay TV (LAMAC, 2010).

In terms of Internet audience consumption, in 2009 Colombia experienced the best growth in Latin America with 36%, surpassing the average of the region which was 23%. In 2009 Latin America internet consumption represented 8% of the entire global consumption (Fosk, 2010).

Numbers confirm the penetration of new digital telecommunication services among Colombians. It has also a special meaning for audiovisual consumption, mainly among who can have access to the new digital platforms.

Research focus and methodology

Based on DANE population estimates for the ten most important urban areas in Colombia, by 2010 there were 1´178.998 male and 1´154.414 females between 17 and 24 years old. We calculated a probability sample of 1.071 inquiries (share 0.5%) to get a reliability of 95% and an error of 3%. The sample also represents a balanced distribution among age groups as seen in table 1.

Table 1. Sample Distribution by age		
Age	**Frequency**	**Share**
17	137	13%
18	135	13%
19	135	13%
20	134	12%
21	135	12%
22	131	12%
23	131	12%
24	133	12%
Total	**1.071**	**100%**

Table 2 shows the sample distribution according to population statistics by cities and their reciprocation with the segment selected.

Table 2. Sample distribution on the 10 main cities			
No	Ciudad	Inquiries	Share
1	Bogotá	463	43%
2	Medellín	146	14%
3	Cali	144	13%
4	Barranquilla	80	7%
5	Cartagena	64	6%
6	Cúcuta	45	%
7	Bucaramanga	33	3%
8	Pereira	32	3%
9	Ibagué	32	3%
10	Santa Marta	32	3%
		1.071	**100%**

Based on the uses and gratifications theoretical framework, the main objective of the study is to analyze the audiovisual consumption on a segment of population in which can be demonstrated the consumption and the use of new digital audiovisual media. The aim is to probe the audiovisual fragmentation-consumption hypothesis among audiences who can respond to the new audiovisual environment.

On this paper we will reveal the general quantitative results and the statistical analysis that confirms the fragmentation consumption phenomenon.

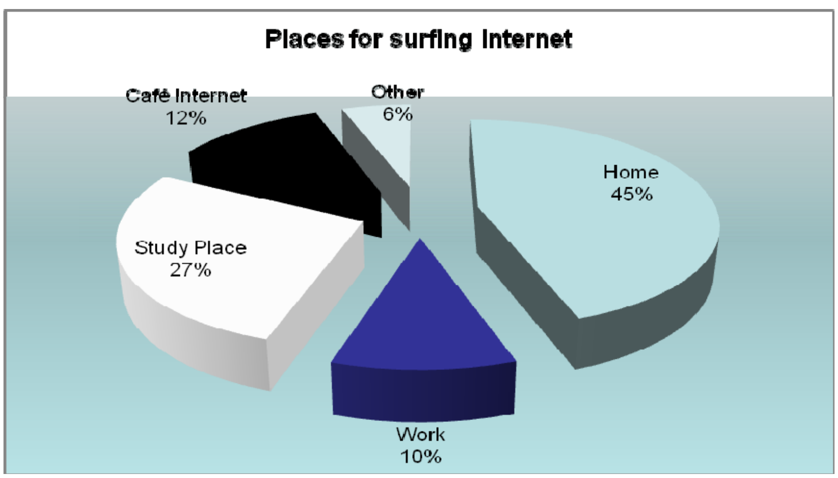
Telecommunication services and television consumption habits

The study confirmed a high penetration of basic new telecommunication services among the sample. The study found 99% of young has either pay television, an Internet broadband connection, cell phone or portable Internet modem. Cell phone is the most common single service (76%), followed by triple play (fixed telephony, internet and paid television 62%) and cell phone data plan 21%.

Triple play plus cell phone is the most recurrent combined telecommunication services (28%), followed by triple play+cell phone+cell phone data plan (13%), and fixed telephony+internet+cell phone (5%).

Home remains the favorite single place for watching television (75%) and the number rises to 99% when is combined with other places. In contrast Internet consumption differs when home is the favorite single place for surfing the web with only 23%, followed by public areas (café Internet) 4,8%, study 1,9% and work place 1,1%. On the most recurrent combined places, home and study place are number one. Graphic 1 shows the most recurrent places for Internet consumption

Figure 1

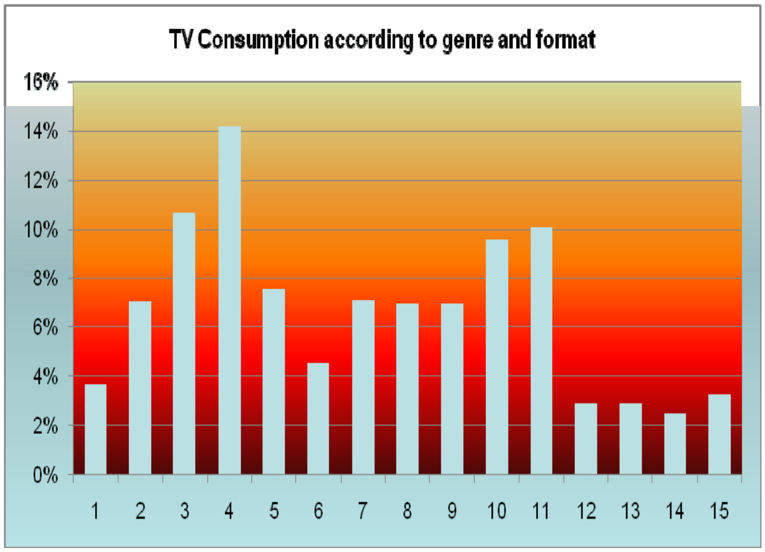


N= 1.071
Source: authors

Four hours and 48 minutes is the average for watching television weekly while on weekends the average raises to six hours and one minute. Youth spend 2 hours and 19 minutes in average watching national television (trough national private channels, national public, regional and/or local) and 2 hours and 29 minutes on international television (trough paid television model, either cable or satellite).

On weekends, youths watch 2 hours and 29 minutes of national television in average, but three hours and 32 minutes of international television. There is correspondence between the kind of programming that they like the most and their favorite channels. Graphic 2 shows how movies, series and documentaries are the most preferred formats. This kind of programming is very common among international channels, while newscasts and novellas (soap operas) are very strong on national channels.

Figure 2



(1.Contests; 2.Cartoons; 3.Series; 4.Movies; 5.Telenovelas; 6.Realities; 7.Humor; 8.Musical; 9.Sports; 10.Documentaries; 11.Newscasts; 12.Opinion; 13.Showbiz; 14.Current affairs; 15.Education)

N= 1.071
Source: authors

In terms of programming channels, 40% do not have a clear preference regarding the nature of the content, while 29% prefer mixed content channels and another 27% prefer to watch what are called thematic or specialized channels, which are pretty common on the closed/paid television system. That explains why 65% prefer international channels as their first option, followed by national, regional or local frequencies. Only 20% mentioned national frequencies for the first option, followed by international, regional and/or local options.

Looking for the veneer of fragmentation, we listed 125 channels included on basic and Premium television packages offered by Telmex (cable) and Direct TV (satellite) that include local, regional and national channels. We asked youths about their five favorite TV channels and there were 57 different mentions for the first channel; 64 different mentions for the second favorite cannel; 70 different mentions for the third favorite; 76 different mentions in the case of the fourth favorite and 80 in the case of their fifth favorite TV channel. Table 3 shows the list of preferred channels, where international thematic frequencies are mixed with the two national private Caracol and RCN.

Table 3. The five favorite channels

First channel	RCN 18%	Fox 9%	Discovery 8%	Warner Bros. 8%	Caracol 7%
Second channel	RCN 12%	Caracol 11%	FOX 9%	Discovery 8%	TNT 6%
Third channel	TNT 8%	Discovery 7%	FOX 7%	RCN 7%	Caracol 6%
Fourth channel	RCN 8,4%	TNT 8,1%	Discovery 7,4%	Caracol 7%	FOX 6,9%
Fifth channel	RCN 11,4%	Caracol 10,7%	FOX 5,7%	MTV 5,7%	TNT 5,3%

N= 1.071 Source: authors

Despite the fragmentation expressed by the respondents and the slight difference between frequencies in terms of percentages, it is fair to recognize that the first five mentions account for up to 50% of the total preferences. For the second channel, the first five mentions account up to 46%; for the third channel, first five mentions account up to 51%; for the fourth channel, first five mentions account up to 37%; for the fifth channel, first five mentions account up to 33%. Although Colombian private frequencies RCN and Caracol remain among the preferences of youth, the penetration of international thematic frequencies contained on the paid television model is evident, leaded by Discovery, FOX, MTV, TNT and Warner.

Considering the big number of different options for television consumption, the recording habit is very low among Colombian youths. From 149 respondents that record television content, 51% use a digital video recorder (DVR), 19% use an external digital recorder (D.V.D.), 19% record straight trough the computer and 11% still use the analogue device V.H.S. for taping programs. From those who record television content, 23% prefer series, 22% movies, 15% sports, 13% documentaries and 7% record novellas.

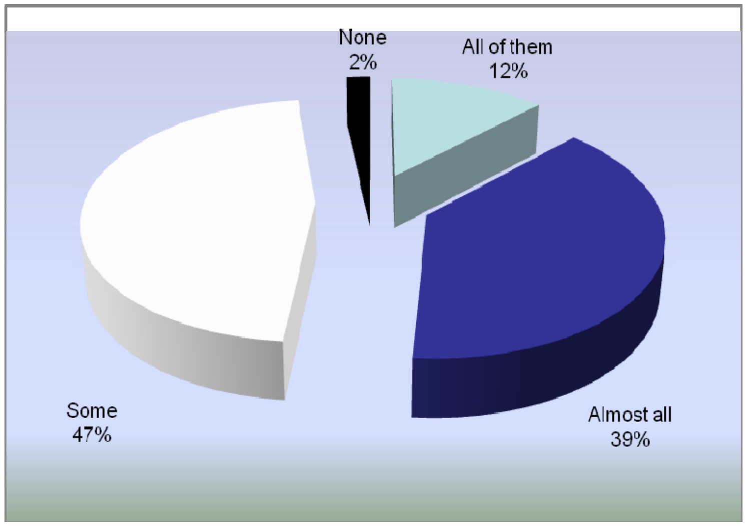
Audiovisual consumption on Internet

Concerning multiscreens, the study also inquired about audiovisual consumption habits through new media such as Internet and PDA´s. On average, young people spend the same amount of time (4 hours and 48 minutes) watching television and surfing the Internet weekly. On weekends, they spend 5 hours and 3 minutes on internet, while 6 hours and 1 minute watching television.

Approximately 90% of young people watch videos or television content through the Internet. Of these 80% look for entertainment formats as the first option, 13% prefer information and only 7% look for audiovisual educational content on Internet as the first option.

The study found that 71% of young people receive videos through Internet. Some 54% of the content is considered entertainment, 26% informative and 20% educative. Approximately 47% of youth watch only some content and only 2% do not watch any video content received trough internet, as we can see on Figure 3.

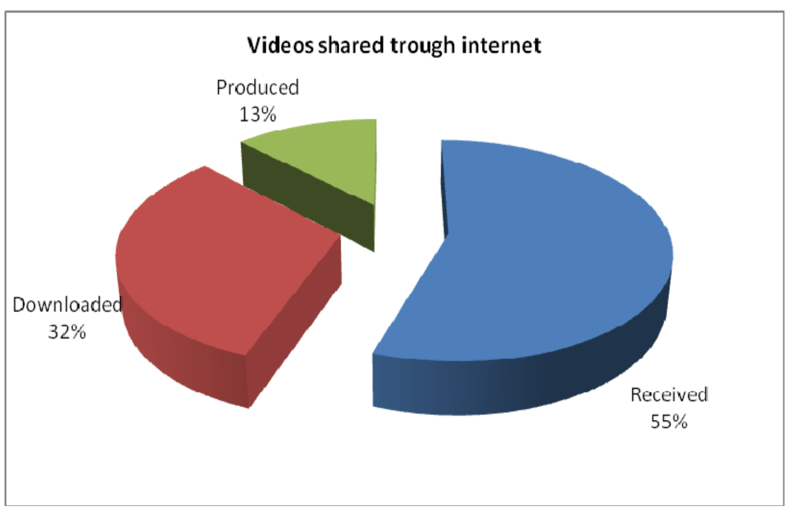
Figure 3



N=760 Source: authors

In regards to downloading 68% of young people download videos, movies or TV programs through the Internet. Of these 75% are considered entertainment, 14% information and only 11% is ranked as educational. Some 46% of youth send and share audiovisual content through internet. Figure 4 shows how 55% of videos shared trough internet is about the content received and only 13% includes self production.

Figure 4



N= 492 Source: authors

Approximately 77% use www.youtube.com as the first option for watching and sharing videos through the Internet, followed by www.megavideo.com (2%). Although YouTube is the undisputed preferred audiovisual site, there were 77 different mentions regarding the favorite web page for watching audiovisual content trough the web, confirming the fragmentation hypothesis.

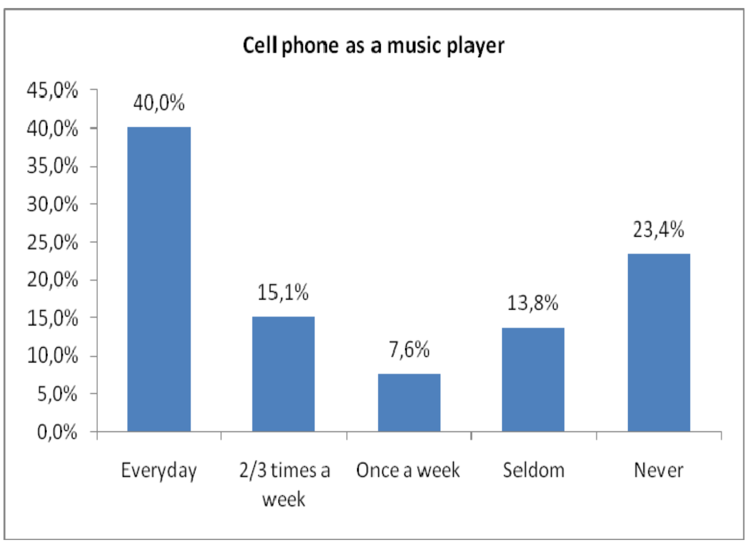
Almost 66% of youth do not visit web pages of traditional television channels. From the 34% that interact with traditional TV channels sites, voting is the first interactive action (33%), followed by e-mailing (21%), contest participation (18%), forums (17%), and chats (11%).

Audiovisual consumption on cell phone

The penetration of cell phone services is up to 76% among the sample. Of these 63% has a pre-paid service, 33% post-paid and 4% both. Besides basic services such as voice and short text message service (SMS), 37% have a data plan, which means they can surf the Internet through their cell phone. About 61% of data plan users have consumption limited, 26% have unlimited consumption and 13% service on demand.

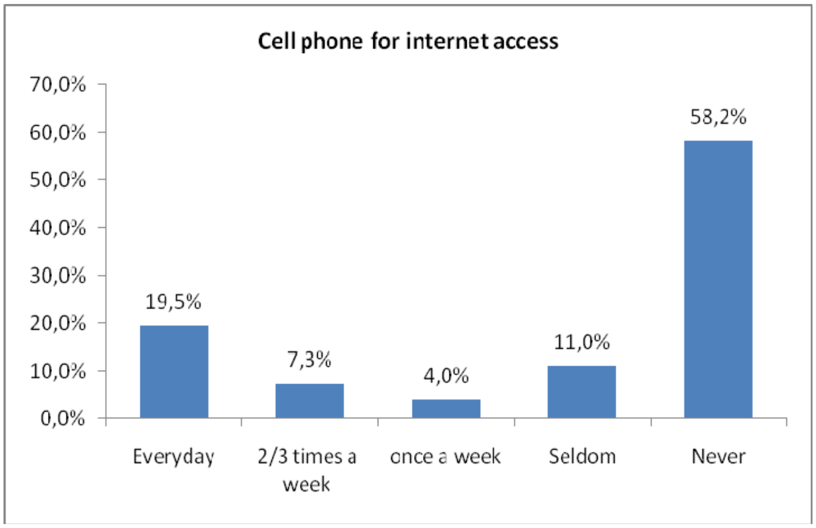
The study asked about audiovisual consumption habits among young people through the cell phone. Music player is the most recurrent audiovisual service, everyday, as can be seen between figures 5 and 8:

Figure 5



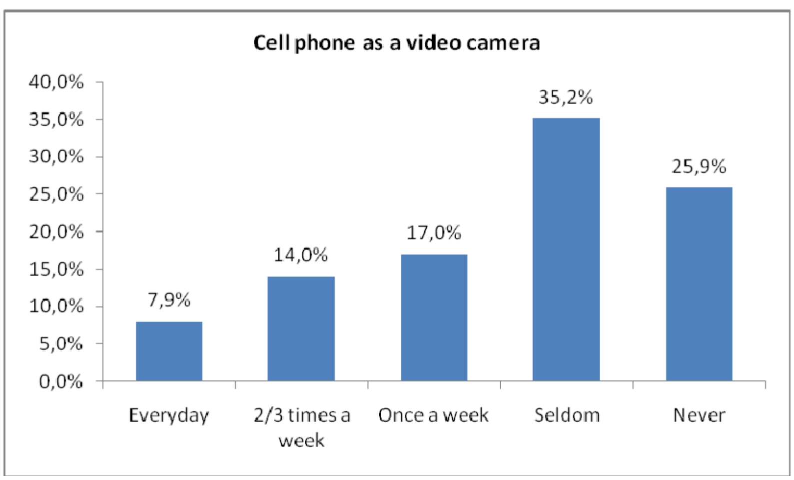
N= 814 Source: authors

Figure 6



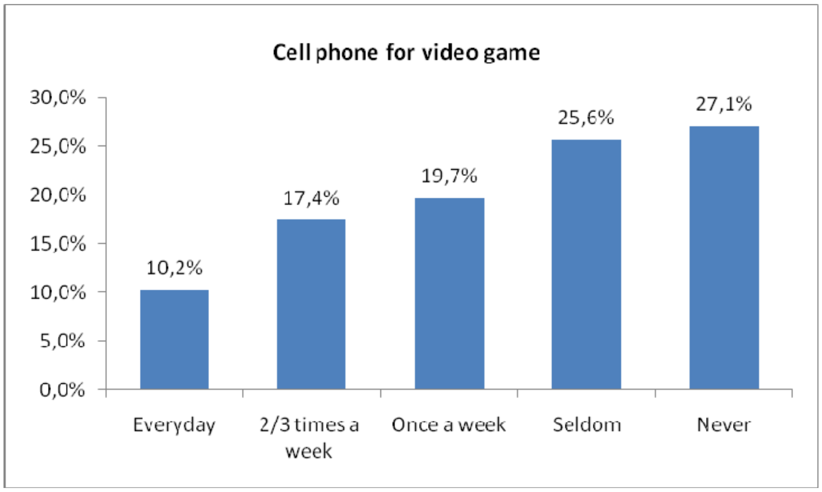
N= 814 Source: authors

Figure 7



N= 814 Source: authors

Figure 8

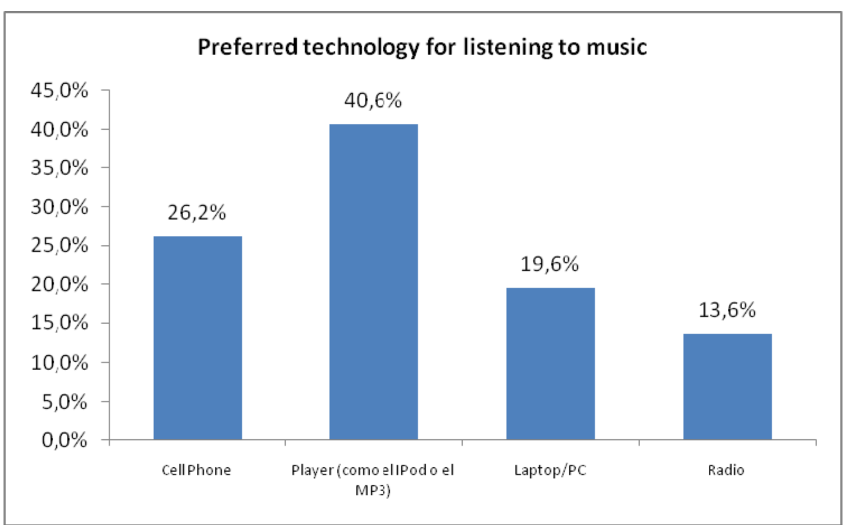


N= 814 Source: authors

It is important to point out that 40% of young share their pictures, music or video files using the cell phone. 6% share audiovisual content everyday, 27% 2/3 times a week, 29% once a week and 38% seldom.

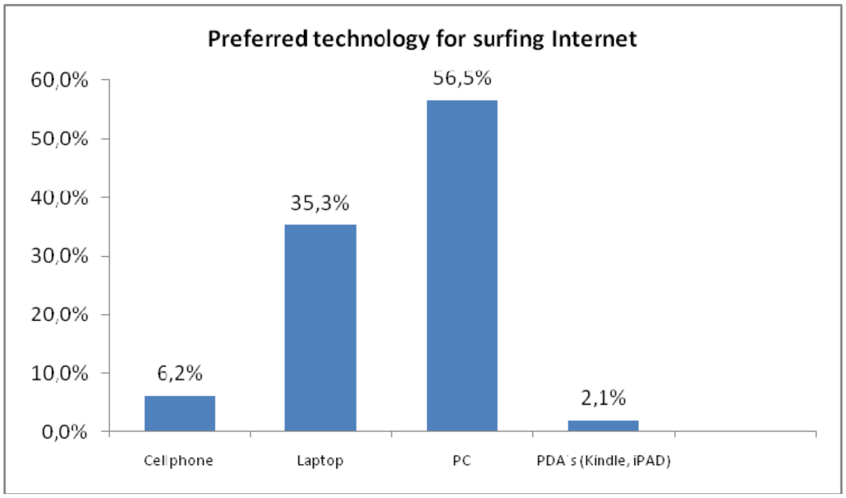
Regarding technological preferences for audiovisual consumption among youth, 40% prefer personal devices (iPod, MP3) or cell phone for listening music. About 20% prefer either personal computer or lap top and only 14% use a radio receiver. Graphics 9 to 13 show the preferred technology according to each type of content.

Figure 9



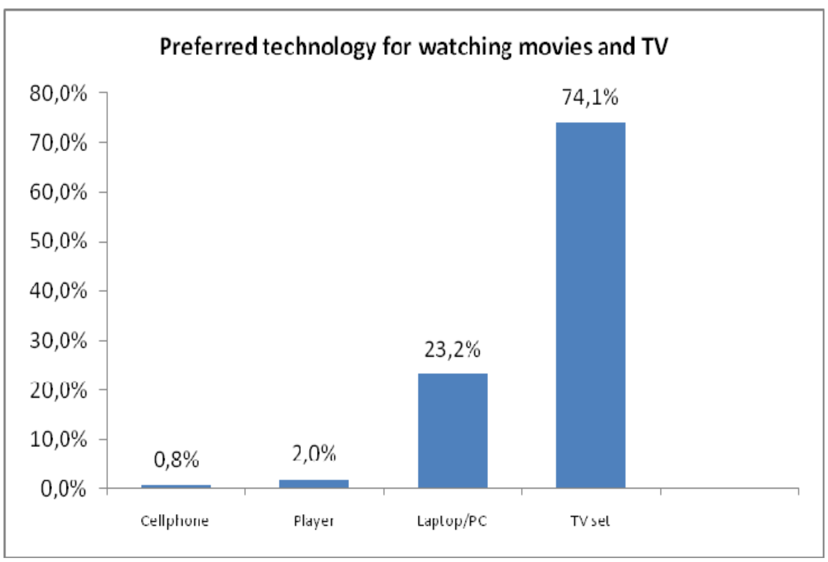
N= 1.071 Source: authors

Figure 10



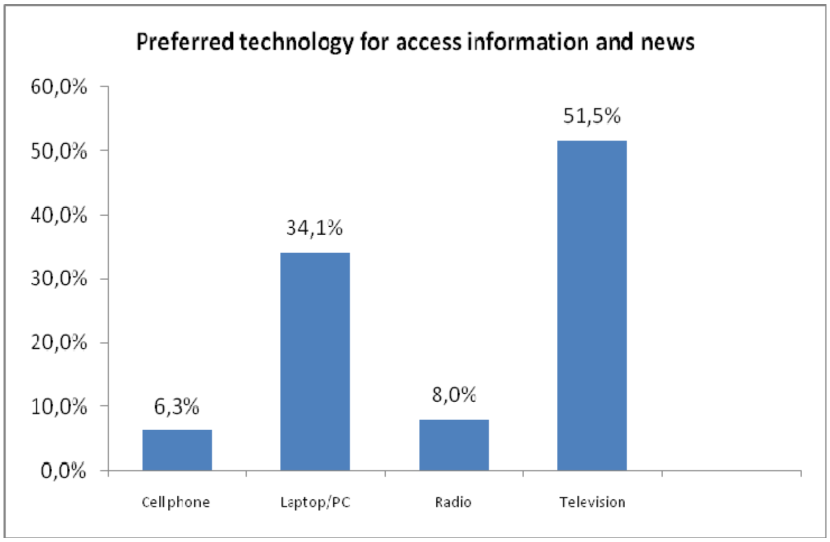
N= 1.071 Source: authors

Figure 11



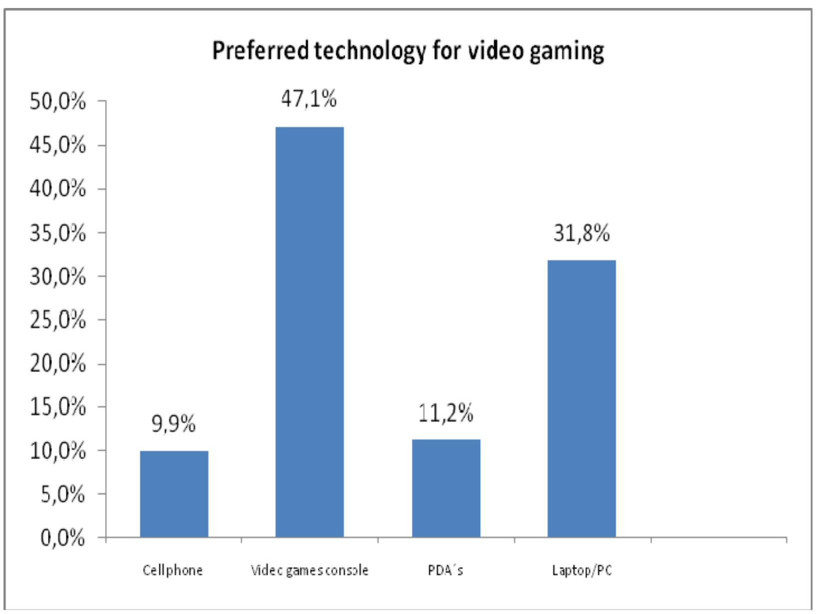
N= 1.071 Source: authors

Figure 12



N= 1.071 Source: authors

Figure 13



N= 1.071 Source: authors

Finally, the study looks at audiovisual multitasking by the young consumer. Approximatley 83% of the youth consume two or more audiovisual media simultaneously, 75% combines Internet with another medium, 70% combines television with other media, 44% combines cell phone and 25% combines radio with other mediums.

Regarding television, 49% of the youth consider they watch less TV content compared to three years ago; 28% feel they watch more TV now and 23% consider their consumption stable. However, television and radio consumption tend to decrease, as seen on table 4.

Table 4. A comparisson between media for personal consumption

Medium	**More**	**Less**	**The same**
Television	28%	**49%**	23%
Radio	32%	**44%**	24%
Film	**37%**	30%	32%
Internet	**92%**	4%	4%
PDA´s	**36%**	33%	31%

Last but not least, young people ranked traditional and new media according to the importance of their daily routine. Internet is the most important medium for 49%, whereas the cell phone is number one for 26%, television for 20%, radio is the most important medium only for 3% and film only for 2%.

Conclusions

- Quantitative analysis shows a high penetration of telecommunication services among young people in the ten most important urban areas in Colombia.
- Statistical analysis also reveals that audiovisual media consumption tends to rise among the sample.
- Audiovisual media young users in Colombia are becoming multitasking.
- Even though Colombia is a country ranked as a developing media economy, there is a combination between traditional and new media in terms of consumption among the sample.
- Television keeps its importance among youth, but its consumption shows the veneer of fragmentation due to an oversupply and undeniable influence among young from the international offer. Although national private channels still remain

on their preferences, International frequencies have become an important part of their daily audiovisual routine.

- Radio, as an industry, is losing attention among young audiences, who are slowly moving away from the traditional broadcasting system, and currently are paying more attention to digital media and personal digital assistant devices for entertainment and music listening, mainly among mid and high income levels in the most important urban areas.

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