RETHINKING THE TV EXPERIENCE. ITALIAN AUDIENCES AND THE NEW CENTRALITY OF TELEVISION(S)

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ITALY AND ITS AUDIENCES: 1945 TO THE PRESENT

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The new centrality of television(s)

- The technological evolution and hybridization with the web and social media are providing the audience with a new television centrality.

- The increasing accessibility to TV content, provided by the multiplication of technological devices along with

- The widespread use of time-shifting and place-shifting practices are producing an overall increase of the amount of time dedicated to TV content and a clear definition of the audience's needs.

INTERACTION

MULTISCREENING & MULTITASKING

SOCIAL TELEVISION

SEARCHING

PERSONCASTING

DIGITAL CIRCULATION

PLEASURES

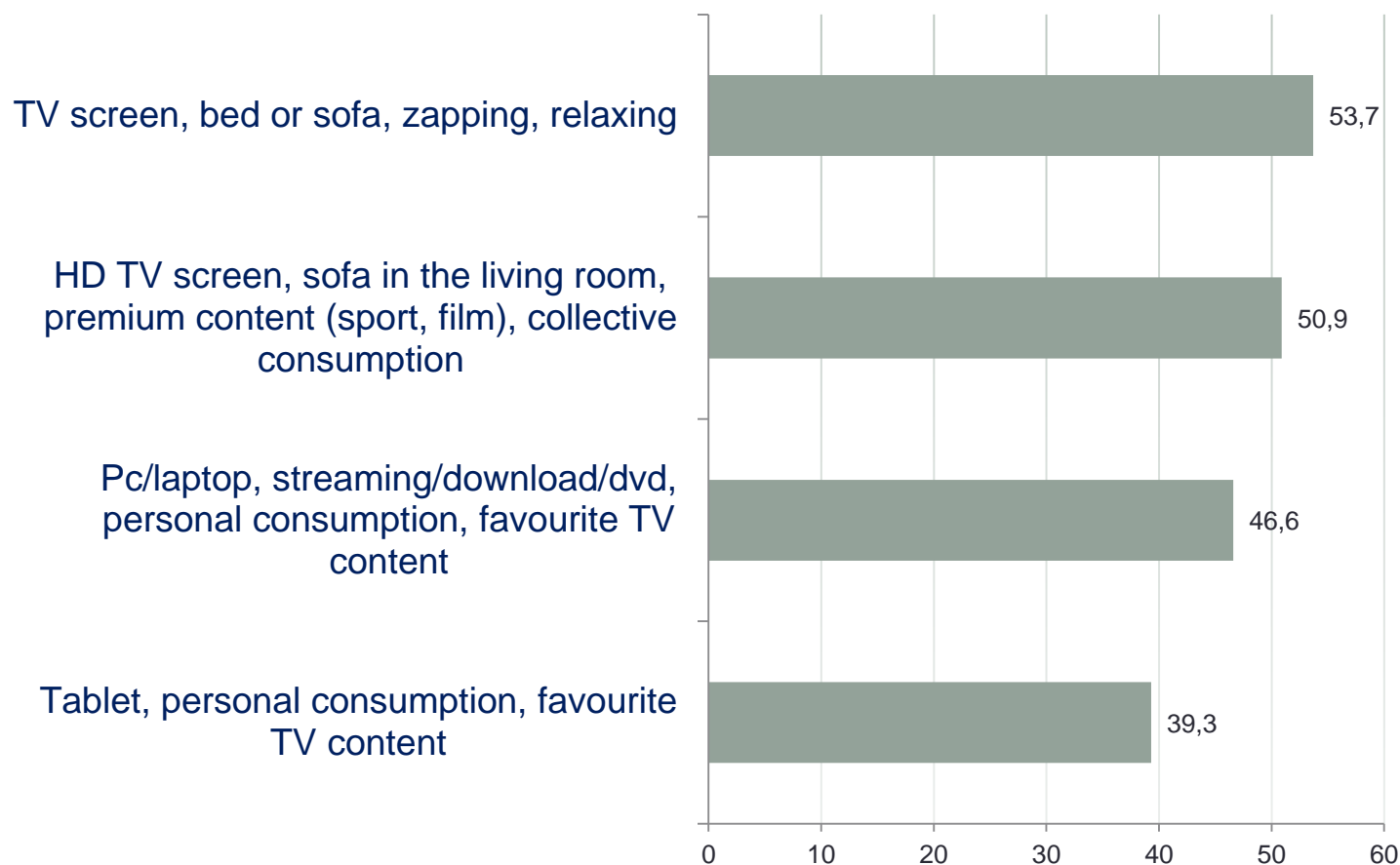# Partners

Survey methodology: step 1

- The Osservatorio Social TV conducted a survey on TV audience (partner SWG). The research is based on 2 different steps:

- a CAWI survey, conducted in two different tranches (May 2015) on an online platform (SWG), on a sample of 1,000 individuals aged 18-65 and 100 minors aged 12-17.

- The sample was analysed in terms of gender, age, residential area, socio-economic conditions, educational level, and internet connection.

- The questionnaire is made up of over 250 questions, concerning the availability of devices and use, consumption settings and scenario, multi-screening and social network sites uses related to TV content.

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Survey methodology: step 2

- An ethnographic research based on web diaries and online forums.

- For 7 days (16 - 22 November 2015) the participants were invited to write a diary (the online community of SWG) about their TV consumption.

- The diary was organized in time slots and the participants had to indicate each single activity of TV consumption with respect to the device, the context, the content, the social TV activity.

- During the same period the participants could interact with others and discuss their behaviours connected to TV in the space of a forum.

What does TV consumption mean?

Favourite consumption practices

Practice	Value
TV screen, bed or sofa, zapping, relaxing	53,7
HD TV screen, sofa in the living room, premium content (sport, film), collective consumption	50,9
Pc/laptop, streaming/download/dvd, personal consumption, favourite TV content	46,6
Tablet, personal consumption, favourite TV content	39,3

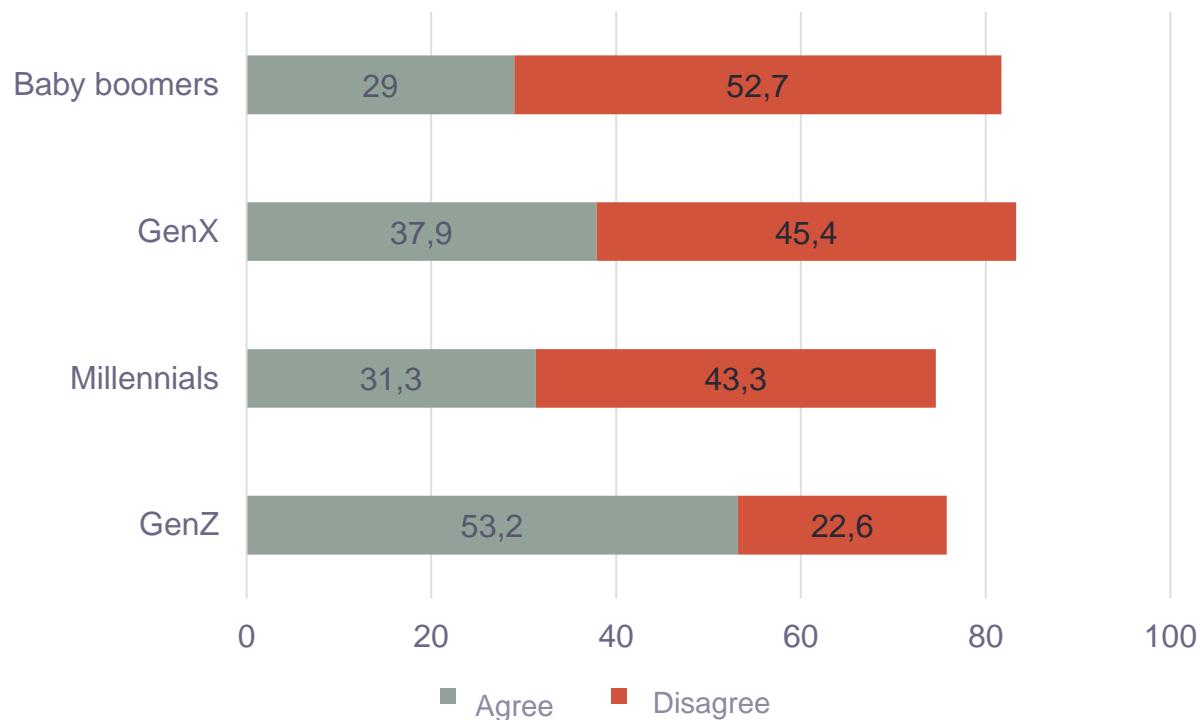CAWI 2015 – 1162 soggetti di cui 143 minori

The revenge of sofa + TV

- *"If I have to watch something, I definitely prefer the TV screen and my couch, because it's so comfortable!»* (female, 35-44)

- *"I bought a flat screen TV, and got Sky with HD, so my TV watching experience has totally changed and I feel more at relaxed, comfortable and satisfied.»*(female, 25-34)

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Discovering new screens

Smartphone, brief viewing of TV content - during the day

Baby boomers: Agree 29, Disagree 52,7
GenX: Agree 37,9, Disagree 45,4
Millennials: Agree 31,3, Disagree 43,3
GenZ: Agree 53,2, Disagree 22,6

■ Agree   ■ Disagree

"Then I cover myself with a blanket, the small phone screen becomes a cinema screen ... Try it :)" (male, 25-34)

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TV Time budget and multiplication of devices

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TV new routines

- *"In the afternoon, when my son was sleeping, I went in my bedroom to watch the last two episodes of Masterchef Italy 4, on my laptop. They were aired the night before. I watched it all lying in bed from 2.30 to 4.00 p.m.*

- *Sometimes the video was interrupted but fortunately I only lost a few lines. At approximately 4.20 p.m. the baby woke up and then he had full control of the TV, watching various cartoons zapping from one kids channel to another.*

- *While we were watching the program together, I checked my email on my tablet and checked out some websites; I chatted with a friend on Whatsapp but our interaction was not related to the TV content that I was watching.*

- *While preparing dinner I watched Studio Aperto (TG) on Italia 1; I saw it on the kitchen TV."* (female, 25-34)

More opportunities to watch TV

- *"During dinner I watched an episode of Friends on streaming. I watched it on my tablet in the kitchen while having dinner, for about twenty minutes, cause I needed to watch something light." (female, 25-34)*

- *"During lunch while I was eating, I watched Le Iene, using an On Demand service by Mediaset on my smartphone."(male, 25-34)*

- *«During prime time, we went into the bedroom, I continued watching Chi l'ha visto on RAI 3, while my partner was watching a TV show (a TV series episode broadcasted some day before) on streaming on his laptop." (female, 25-34)*

Multi-screening is growing

Tv + Second screen devices

Chart: horizontal stacked bar chart comparing Tv + Second screen devices by "Regularly" and "Not regularly" usage.

- Tv + Smartphone: Regularly 28,5 | Not regularly 31,9
- Tv + Laptop: Regularly 16,2 | Not regularly 24,1
- Tv + Tablet: Regularly 16,1 | Not regularly 20,1

Legend: ■ Regularly ■ Not regularly

X-axis: 0 10 20 30 40 50 60 70

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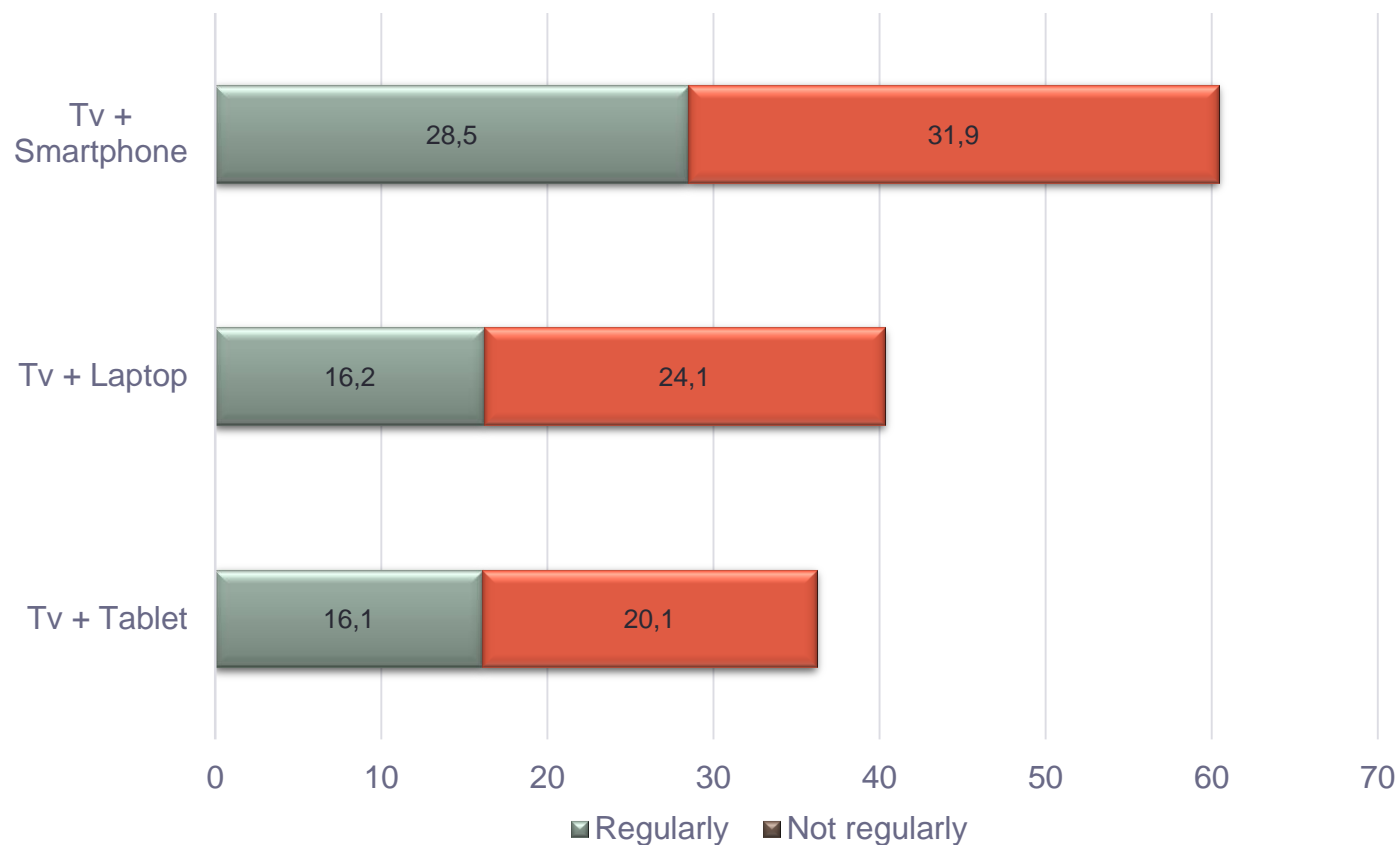
The digital life of TV content

How to choose what to watch

Chart: "How to choose what to watch" (values in percentages, Regularly / Not Regularly)

- Choosing what to watch based on information and recommendations from social media before program or content is on the air: 18,33 | 40,71
- Turning on the tv because of comments on social media related to TV content on the air: 13,68 | 30,12
- Turning on the TV because of comments on whatsapp related to TV content on the air: 13,86 | 25,82

Legend: ■ Regularly ■ Not Regularly

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A sense of continuity between screens

Moving from one screen to another

Using a mobile screen to watch TV program or content and then going to another part of the house (or another context) keeping on the mobile screen
- 40,9
- 30
- 22,2
- 10,7

Starting to watch a TV program or content alone on a mobile screen and then watching it on a big TV screen
- 27,7
- 18
- 14,4
- 7,1

Starting to watch a TV program or content alone on a mobile screen and sharing it with others on a big TV screen
- 25,5
- 19,8
- 16,5
- 6,3

Legend: ■ Gen Z ■ Millenials ■ Gen X ■ Baby boomers

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Expanded television text (and experience)

In your experience you usually watch

Chart: "Only the original TV programs in their television format"
- Gen Z: 50
- Millenials: 56,1
- Gen X: 73,3
- Baby boomers: 83,5

Chart: "TV programs and all the contents produced around them (videos, web-series, teaser, etc.)"
- Gen Z: 44,1
- Millenials: 33,9
- Gen X: 18,3
- Baby boomers: 12

Legend: ■ Gen Z ■ Millenials ■ Gen X ■ Baby boomers

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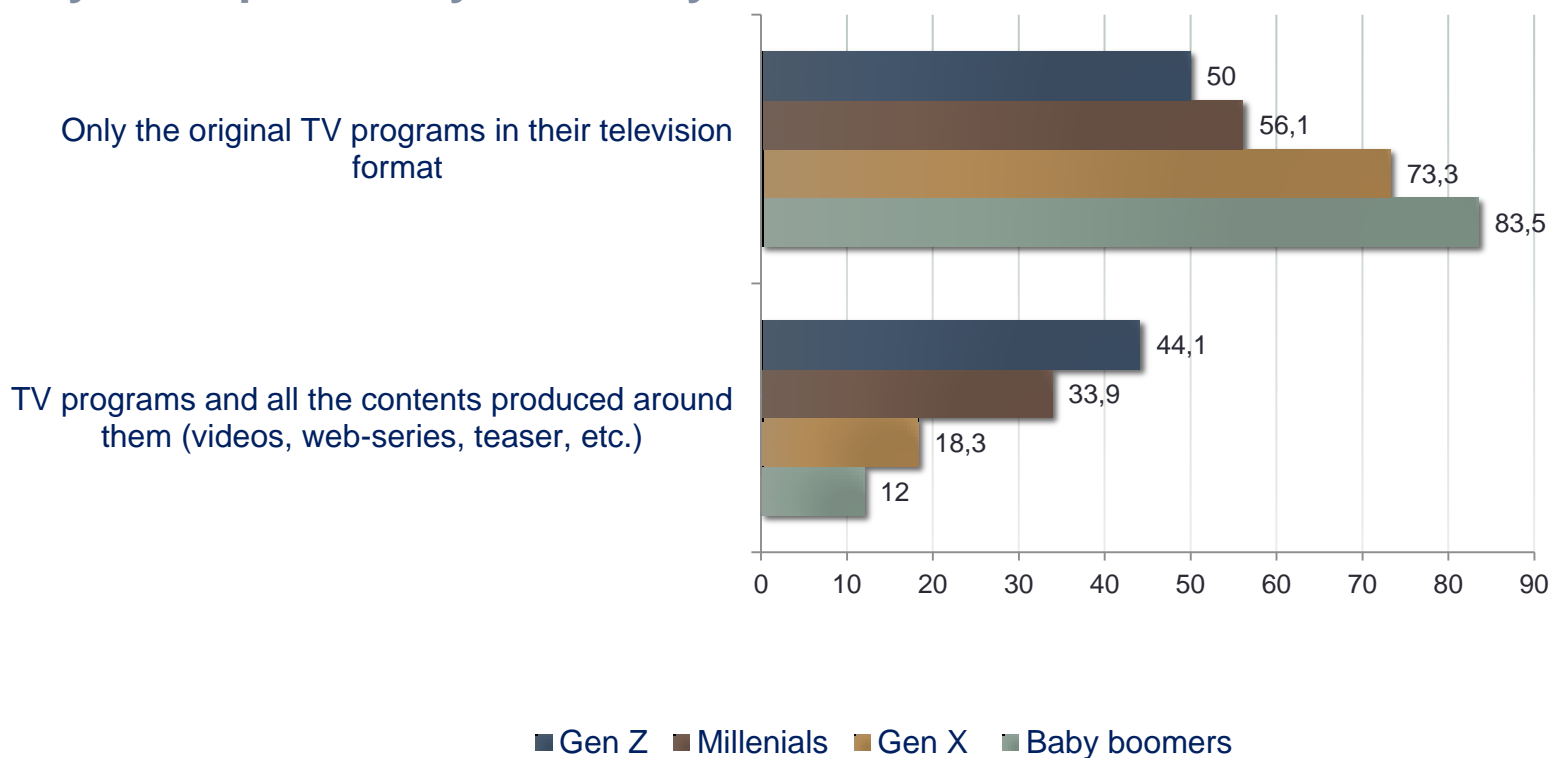
Audience lurking

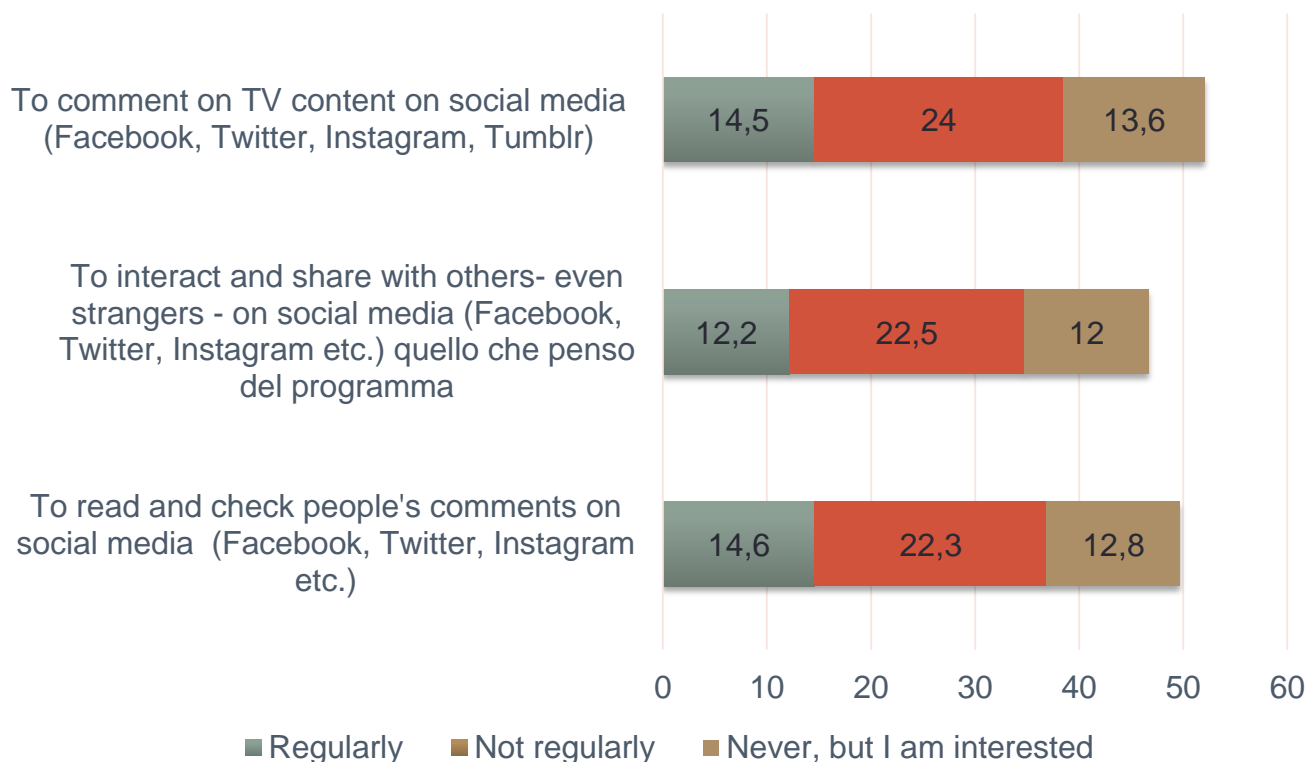- "*I don't like that anyone can read my comments. I usually read other people's posts and comments. Recently I read comments on the final episode of BakeOff. I wanted to see how the game was perceived by others. I read posts on Facebook since I find it the easiest interface to use on line*". (male, 25-34)

Active audience on social media

Lurking and/or commenting

To comment on TV content on social media (Facebook, Twitter, Instagram, Tumblr): Regularly 14,5 | Not regularly 24 | Never, but I am interested 13,6

To interact and share with others- even strangers - on social media (Facebook, Twitter, Instagram etc.) quello che penso del programma: Regularly 12,2 | Not regularly 22,5 | Never, but I am interested 12

To read and check people's comments on social media (Facebook, Twitter, Instagram etc.): Regularly 14,6 | Not regularly 22,3 | Never, but I am interested 12,8

■ Regularly   ■ Not regularly   ■ Never, but I am interested

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Audience engagement

- "*I sat on the couch and I watched Gilmore Girls episodes (re-runs) on La5, which I totally adore! I could watch it at any time. It's my favorite show! Then I started sharing my 'feelings' on Whatsapp while discussing the episode of Gilmore Girls, sighing for Rory. She's so lucky that so many good looking boys like her. Basically, we had fun in reliving memories".* (female, 18-24)
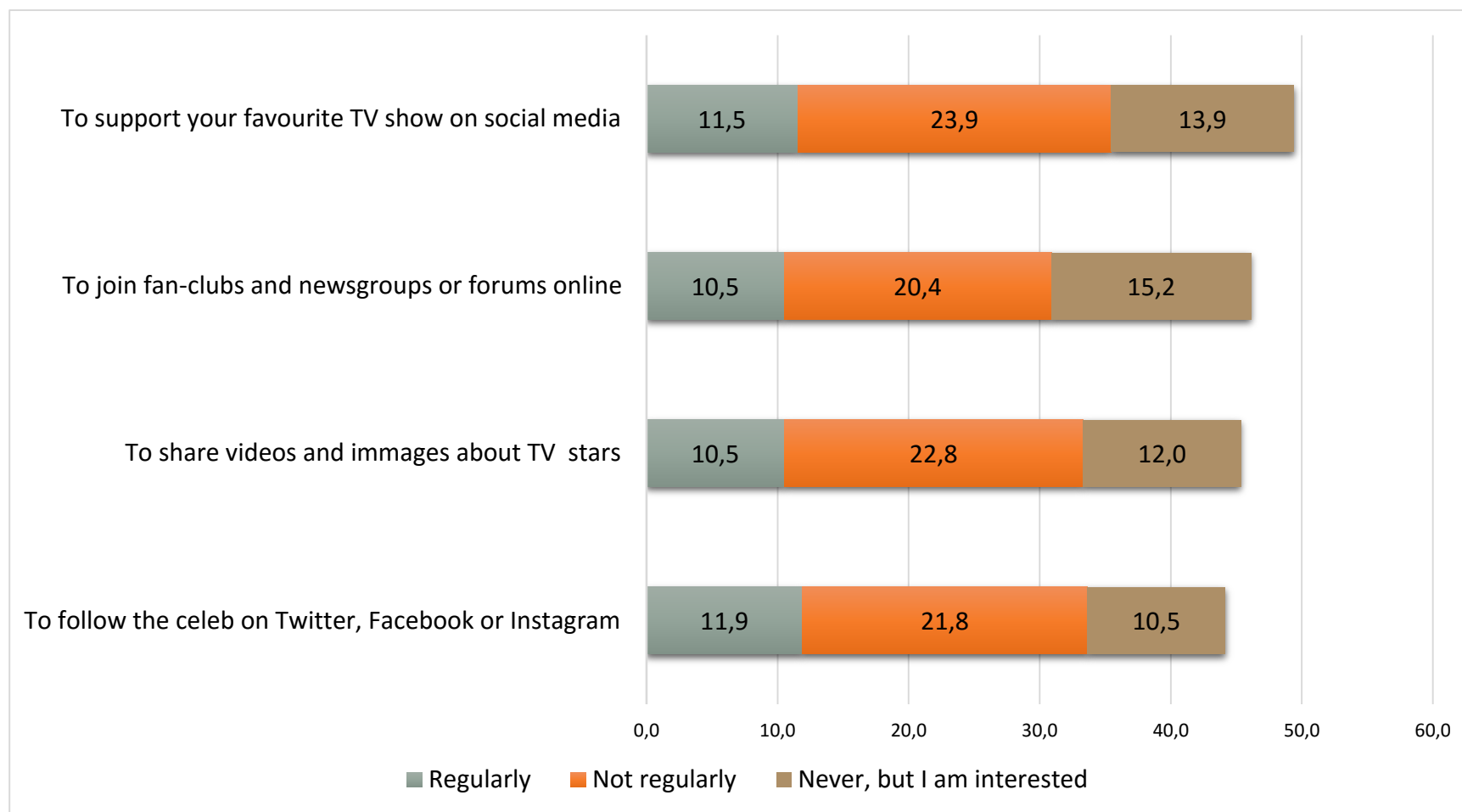
Always searching for …

- *"After watching, randomly, a TV promo on Sky, I surfed the Internet not to interact on social media, but to look for information on this new show running on Comedy Central. I decided to look for information because the main actors on the Show are two comedians who, in the past, were on in Zelig, which is very funny and, so, I wanted more information."(female, 25-34)*

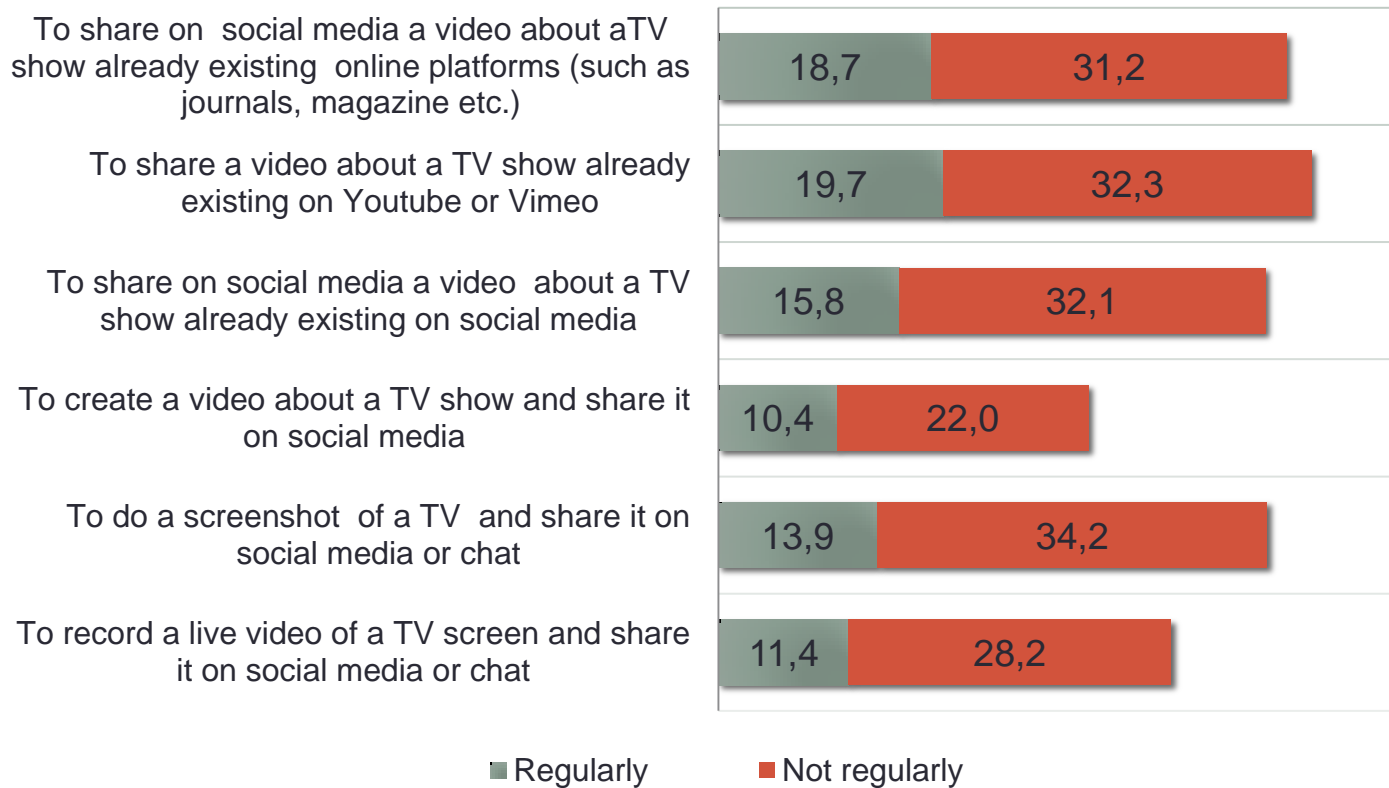# From searching to fandom practices

- *"Well, obviously both for athletes and for the actors the first step is to check Wikipedia. You find information about their careers and know more about what they did in their lives. Immediately after, you can check their official accounts on social media, Twitter and Facebook, and if these celebrities are special, hitting Like is a must".* (male, 25-34)

Fandom practices

	Regularly	Not regularly	Never, but I am interested
To support your favourite TV show on social media	11,5	23,9	13,9
To join fan-clubs and newsgroups or forums online	10,5	20,4	15,2
To share videos and immages about TV stars	10,5	22,8	12,0
To follow the celeb on Twitter, Facebook or Instagram	11,9	21,8	10,5

■ Regularly ■ Not regularly ■ Never, but I am interested

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Productive practices

While watching TV program, one may decide:

	Regularly	Not regularly
To share on social media a video about aTV show already existing online platforms (such as journals, magazine etc.)	18,7	31,2
To share a video about a TV show already existing on Youtube or Vimeo	19,7	32,3
To share on social media a video about a TV show already existing on social media	15,8	32,1
To create a video about a TV show and share it on social media	10,4	22,0
To do a screenshot of a TV and share it on social media or chat	13,9	34,2
To record a live video of a TV screen and share it on social media or chat	11,4	28,2

■ Regularly   ■ Not regularly

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Conclusive thoughts

1. The new centrality of television is not only a matter of quantity, but a matter of quality (or perceived quality). And it is connected to the idea of TV experience as an event.

2. Circulation is one of the key point of the new centrality of television: as a materialization of anytime anywhere television; as an expanded pleasant experience for the audience, beyond the text.

3. The multiplication of mobile devices used as a TV screen is now producing an incentive to share – more than in the past - the TV experience.

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