REPORT ON MEDIA CONSUMPTION IN PORTUGAL

2016

ENTIDADE REGULADORA
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CONTENT

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EXECUTIVE SUMMARY

PART I
MEDIA CONSUMPTION

The aim of this section is to understand the relationship that individuals establish with different forms of media and with the range of platforms in outdoor and indoor contexts. This has allowed the production of a detailed picture of the Portuguese media practices.

INTERNET CONSUMPTION

Based on the idea that having Internet access does not mean regular access, the study estimated the percentage of Portuguese people who access the network at least once per week. In contrast to the current narrative on the country's digitalisation, it has been verified that 39.5 % of those surveyed do not access the Internet frequently. This is corroborated by studies on this matter showing that Portugal is lagging behind the rest of Europe.

By regions, the highest percentage of regular access is seen in the Algarve (72 %), followed by Greater Lisbon (67.9 %), Alentejo (58.2 %) and the North (53.3 %). In terms of age, there is a major gap between frequency of access by younger people (96.3 %) and those over 65 (11.5 %). The main activities carried out are sending/receiving emails (87 %), especially by males, and accessing digital social networks (79.9 %), mainly by females.

53.6 % of the sample access online newspapers and magazines, followed by radio (22.7 %) and television (21.7 %). This ranking is in line with content made available online by the media in Portugal, with the press using the internet as an extension of paper, allowing issues to be examined in greater depth and information to be updated more quickly. In which concerns the usage of the new possibilities opened up by the internet, the press has been more active than other media, particularly television, whose online offerings are very focused on streaming and making available programmes that have already been transmitted, in effect duplicating functionalities offered by receiver boxes.

In a mobility context, the Internet is mostly accessed through smartphones, particularly by the age range 15-24 years.

NEWSPAPER AND MAGAZINE CONSUMPTION

Over two thirds of Portuguese people regularly access both print and online versions of newspapers and magazines (68.2 %), with most activity in the age ranges of 25 to 34 years and 35 to 44 years, with an average access of 78.5 %. The migration of publications to digital formats is the undeniable reality of the Portuguese media scene. However, the study reveals that regular readers of newspapers and magazines continue to access the content in hard copy (94.8 %), followed by access through official websites of the publications (39.8 %), online portals (34.7 %) and digital social networks (34.3 %).

RADIO CONSUMPTION

Radio is regularly listened to by 73 % of those surveyed. This value is in line with the French case (75.5 %) and is higher than the Spanish situation (60.1 %). The working age population and students are especially active listeners, with a percentage of over 80 %. Men are shown to have greater links to the radio than women, and car radios continue to be the most popular means of access (60.6 %), whereas computers are the least used means of access (11.6 %).

TELEVISION CONSUMPTION

99 % of those surveyed regularly watch television, and no significant differences have been seen in terms of age or gender.

The choice of the main television in the home is essentially based on screen size and image quality. Close to a quarter of all Portuguese people only have access to five free to air channels. In 65.9 % of cases, this fact is due to economic reasons.

Out of the 767 respondents who have access to over five channels, only 6.9 % habitually use video-on-demand, with the youngest age range (15-24 years) being the one that most uses this service.

PART II
AUDIOVISUAL CONTENT CONSUMPTION

EQUIPMENT/DEVICES

After television, the mobile phone/smartphone is the device with the greatest presence in Portuguese homes (75.2 %), followed by laptops (52.9 %), DVD players/recorders (48.5 %), desktop computers (32.5 %), tablets (30.2 %) and video game consoles (26.2 %).

CONSUMPTION BY CONTENT TYPE

"News" is the most sought after programming sector (89.5 %), followed by stock products such as "telenovelas", "films" and "series" with an average of 56.3 %. "Entertainment programs", with 50.3 %, has the edge over "documentaries" (47.2 %) and "sport" (44.6 %). The list is rounded off by "music" and "cartoons", with values lower than 30 %.

By gender, it can be seen that men more significantly consume "news", "series", "documentary", "film", "sport" and "music" content, whereas women are the largest consumers of "telenovelas", "entertainment programs" and, probably when watching with young children, "cartoons".

"News" is followed by over 80 % of all age ranges, with the exception of the youngest (68.9 % among 15-24 years old). Individuals between 15 and 24 years old prefer "series" (80.7 %), whereas the central age ranges – 25 to 54 years – choose "films" in second place, with average consumption of around 70 %, and the two oldest age ranges - 55-64 and over 65 - place "telenovelas" (with 65 %) in second place of their preferences.

Television sets continue to be the preferred means of access to audiovisual content, with values over 90 %. All other devices – desktop/laptop computers, tablet and smartphone always recorded at below 31 % for the consumption of all audiovisual content.

LIVE VERSUS PRE-RECORDED TELEVISION CONSUMPTION

67.2 % of 1005 respondents who watch television at least once per week, and who state the percentage of time that they spend viewing content, only view "live" television. By age range, it can be seen that the highest delayed consumption is among individuals between 25-34 years (52.8 %), followed by the 15-24 (46.6 %) and 35-44 (45.4 %) age ranges. Conversely, among those surveyed over 65 years of age, only 7 % watch television that is not broadcast live.

Out of the 33.8 % of individuals who consume pre-recorded audiovisual content (Timeshif), a significant percentage uses the following functions: "rewind to view a programme from the start or a particular time" (87.9 %), followed by "view programmes available in the box, but not recorded by you" (61.5 %) and, lastly, "set recordings for programmes", with 49.4 %. It is also seen that stock content is the most sought-after for Timeshift.

Out of the 330 respondents who set recordings for programmes, 49.7 % view them within three days, and 10.6 % view on the same day (VOSDAL – view on the same day as live).

Out of the four reasons presented for consuming content outside its broadcasting time, it is notable that 66.1 % consider the possibility of "viewing at times that better suit my routine" as "very important", and 30.6 % consider that it is "important" "to be able to view programmes that are transmitted on different channels simultaneously". Respondents point to "being able to view several episodes of the same programme, one after another" as "not important" (41.2 %), along with "avoiding watching advertisements", which is also considered non important by 36.7 %.

Out of the 1005 respondents who watch television at least once per week, and who state the percentage of time that they spend viewing content, 30.9 % use the "TV Guide", followed by the use of "Descriptive Information" (24.2 %). The rest of the functions offered by new generation television equipment - "interactive apps", "browsing the Internet" and "social network access" - have low usage values of between 4.8 % and 8 %.

MULTISCREENING

The simultaneous use of screens – a practice often confused with second screening – is not significant with respondents, with smartphones achieving the best result (29.8 %). The most noteworthy activities are "the use of digital social networks" (63.8 %), "sending and receiving emails" (51.6 %) and "sending instant messages" (46.8 %). Searching for information about television programmes being viewed only appears in sixth place, with 11.5 %.

INDOOR TELEVISION CONSUMPTION ROUTINES

Out of the 1005 respondents who watch television at least once per week, and who state the percentage of time that they spend viewing content, 60.8 % have the habit of "turning on the television" when they arrive home. 11.1 % "turn on the computer" and only 4.2 % "turn on the radio". It should be emphasised that 29 %, in their daily routines, do not include contact with the indicated media at the moment of arriving home. Women are the ones who "turn on the television" most when they arrive home (63.9 %). By age range, it is the most usual habit among the central age ranges, with average adoption of 65 %, followed by the age range of over-65s (56.1 %) and the 15-24 years old age range (48.9 %).
When faced with eleven possible responses to "ways of using the television set other than watching television", 86.4 % of respondents answered that they do not use it for any other purpose. The most significant use given to the television set, other than watching television – "Viewing DVD/Blu-Ray on the DVD/Blu-Ray player" – accounted for only 6.7 %, followed by "playing video games" with 4.1 %. The remaining uses, more representative of connection with the worldwide web, saw usage values of between 2.4 % and 0.5 %, showing a weak uptake of functionalities offered by Smart TVs.

OUTDOOR TELEVISION CONSUMPTION ROUTINES

Out of 1018 respondents about audiovisual consumption away from home, 57.9 % admitted to not having the habit of doing so. However, it is a significant practice among the age ranges of 15-24 (52.6 %), 35-44 (50.3 %), 25-34 (44.7 %) and 45-55 (41.5 %). "News" and "sports" content are the most sought-after in outdoor contexts, with consumption essentially in "public places" and "on television".

CONSUMPTION OF ONLINE AUDIOVISUAL CONTENT

Consuming audiovisual content on the Internet is not a practice rooted in the routines of most respondents, although it reaches very significant values among those between 15 and 34 years old. The most significant practices are "viewing downloaded content, and content shared by friends" (64.4 % among 15-24 years and 51.6 % among 25-34 years), "listening to downloaded music/music shared by friends" (62.2 % among 15-24 years and 49.1 % among 25-34 years), "downloading free films/series" (49.6 % among 15-24 years and 39 % among 25-34 years) and "downloading music files from unofficial sites" (48.9 % among 15-24 years and 32.7 % among 25-34 years). Conversely, purchasing music, films and series online is a residual practice, with values of below 8 % in all age ranges.

MEDIA DEPRIVATION

"Stopping watching television" is the activity that respondents would have most difficulty doing (65.5 %), particularly among older age ranges of the population and women. "Stopping browsing the Internet" is in second place (26.7 %), among younger people, and particularly men. "Stopping listening to the radio" (4.4 %), "stopping reading newspapers and magazines" (2.6 %) and "stopping playing video games" (0.8 %) occupy the rest of the places on the table.

SUBSCRIPTION TO ONLINE AUDIOVISUAL CONTENT

When asked about interest in subscribing to online film/series/documentary catalogue access services for a cheap price, 55.9 % stated that they had "no interest".

PART III
TIMESHIFT

Technology breakthrough enabled viewers to watch the programmes they want, when they want it and how they want it.

This new form of consumption, known as pre-recorded consumption or timeshift, is already reflected on television audience measurements.

The purpose of this section is to demonstrate the impact that the Timeshift has on Portuguese people's lives.

In Portugal, this consumption is published since January 2016, which made this innovative study possible. For the very first time, an overview of television Timeshift characterization is given, which is segmented into different variables and indicators.

On average, 88 % of measured consumption by television audiences corresponds to linear consumption referring to the 150 referenced channels, with 12 % corresponding to other consumption.

Out of this 12 % of other consumption, 49.3 % is consumption of Timeshift that were aired up to seven days, and 50.7 % is consumption of programs that were aired more than seven days before, video games, recordings and unmeasured channels.

Out of the 49.3 % of Timeshift, 58.4 % is viewed on the same day it was broadcast and 41.6 % is viewed over the seven days following the broadcast date.

On average, 20.5 % of the Portuguese population 4 years old and over watched at least 1 minute of Timeshift between 1 January and 15 April, 2016.

On average, the time spent by these individuals was 86 minutes.

Women (90 minutes) spent more time viewing pre-recorded programs than men (82 minutes).

The 4-14 years (26.5 %) and 35-44 years (26.3 %) age ranges consumed a noteworthy amount of Timeshift.

During weekends there is greater contact with pre-recorded programs. 22.4 of the population aged 4 years or over used this functionality at the weekend, compared to 19.8 % during the week.

The total female audience is higher in FTA channels, and the time spent is higher. The total male audience is higher in paid channels, but the time spent viewing pre-recorded content on these channels is the same for men and women.

Curiously, it is on the generalist channels where there is the greatest amount of pre-recorded consumption (37.1 %), followed by series and films (30.4 %). However, the time spent viewing with a delay is higher on series and film channels (75 minutes on average) compared to 64 minutes on FTAs.

Considering types of channels, men are 63.5 % above women in the Timeshift of sport channels, and women are only 18.5 % above men in the Timeshift of generalist channels.

Emphasis should be placed on the following categories, taking ages into account: Children between 4 and 14 years of age consume approximately three times more children's channels than other age groups.

The 35-54 years group is the one that stands out in the categories of sport and information. Regarding the series and films category, the 35-44 years group stood out above the rest, with 55.2 %.

As regards generalist channels and thematic channels, the 45-54 age group is most notable, as on average it consumed approximately 45 % more than all other age groups.

PROLOGUE

We are living in an era that is providing the public access to more news, information, and entertainment than ever available before. New communications platforms and services, fresh providers of content, and innovative ways to obtain and consume have and continue to appear

This environment has created high choice markets in which consumers make extensive choices about what content they wish to receive, when they obtain it, on what platforms, and how they use it. This is altering traditional use patterns for media content, breaking down the large audiences of the past and creating unique individual use patterns. Media firms, advertisers, intermediary firms and platforms are all struggling to determine how to best analyse and respond to that individual behaviour. It is becoming clear that current methods of tracking audiences do not provide sufficient understanding of individual lives and their social contexts or about the locations and settings of media use, and the true extent of their engagement.

Despite the limitations in measuring audience behaviour, some general trends are becoming evident in media use across developed nations: Heavy use of audio-visual content, rising se of the internet, social media, and mobile apps and services, and declining print media use. Media consumers are increasingly connected, using media and communications platforms simultaneously, and have far more active relationship with information and entertainment providers than in the past. The speed and extent of the changes vary, of course, because of different levels of investment in new platforms and services, pubic policies, language, and other factors, but the overall directions of the shift in consumer behaviour are clear.

The comfortable conditions previously experienced by publishers and broadcasters have been stiped away by increase competition and consumer preferences. This is reducing their abilities to profitably connect advertisers to audiences and the new providers are struggling to do so as well, except for a few dominant intermediaries such as Google and Facebook. Consequently, consumers are increasingly being relied upon for revenue and media and communications firms are seeking new opportunities to create new business models and revenue streams that did not exist in the past.

The changes are affecting the media and communications businesses, but are also providing great benefits to individual consumers and society through increased choice. They are also creating changes in the communication environment that are challenging to social cohesion, identity, language, and domestic media firms by altering the traditional national markets boundaries of media and communications firms. These factors create concerns for social observers and policy makers because they are at the heart of issues of society and citizenship.

It is against this background that the authors of this report have studied how media are being consumed in Portugal. The study is based on an extensive survey of Portuguese citizens and their media use. It is important not only to those in and supporting the media and communications industries, but also to social observers and policy makers who seek to create the best possible media environment for Portuguese citizens.
The data and analysis in this report provide critical understanding to how contemporary audio-visual, internet based, and mobile delivered media and platforms are affecting the use of print and broadcast content. This understanding is crucial because Portuguese media play central roles in national identity, democratic politics, providing information about Lusophone countries, and extending Portugal's economic and political influence.

The study shows television and audio-visual content in use patterns are dominant, but that there is increasing time shifting and asynchronous use of content. It shows that use of the internet to access many types of content is growing and that content produced by Portugal's print media is increasingly accessed by digital means.

These shifting use patterns point to significant adoption of contemporary technologies in media consumption, but they are also providing a cautionary signal that existing media must continue to adapt to these changes in audience behaviour and that long-standing business models must be adapted to survive in the new environment.

Portuguese media companies must make significant efforts to make customers central to their strategies, providing better experiences and increase consumer engagement, and shift to a service logic instead of the goods production logic that has driven media industries activities for a century. They need to stop thinking merely about aggregate groups of audiences and think more about how they can serve the individual needs of media consumers by solving their problems and improving their lives. It will be a big task to make these changes, but evidence of transformation is already appearing in some Portuguese media and I have high hopes of its future.

Robert G. Picard
Oxford University

PRESENTATION

THE ELECTRONIC LIVING ROOM

«Time changes, and our desires change.
What we believe – even what we are – is ever-changing.
The world is change, which forever takes on new qualities.»

I have some clear memories from my childhood, and two of them involve television.

One concerns the time I was in a neighbour's house and watched television for the first time. There were lots of people there, because this was the only family in the street with a television at home.

The second memory is an image that I remember very clearly, of the first time we turned on a television in our house and the transmissions started in the early evening with cartoons that came on after the famous test card.

You can see that I belong to a generation that had a very unique experience. We watched the start of transmissions and the move from black and white to colour. We were fascinated with the big box full of valves that has now become a trivial experience, for example with the consumption of videos on a smartphone screen. The aerial that brought life to the "magic box" is now a "data package" that arrives via "fibre".

Mealtimes at home were dictated by RTP, the national broadcaster. Now, the vast majority of Portuguese can choose when to watch their favourite programme. Most importantly, a scarce commodity has been democratised, and almost all families now have at least one television at home.

All of this in one to two generations.

In truth, it is an experience of little more than half a century that was "always taking on new qualities". However, it remains beyond doubt that "watching television" retains its preponderant role in the Portuguese routine.

It is a ritual that has not changed much. In place of embroidery, we have a set of remote controls. In place of a framed picture of the family, we have a "3D-Surround sound processor". The ritual of "watching television" remains, the living room has turned electronic.

Without doubt "TV" has played a determining role in Portuguese society, in its most varied perspectives. This is confirmed in the conclusions of this study.

This was the reason that the main topic of analysis in the 2015 survey "ERC – Public and Media Consumption" was "The new dynamics of television consumption in Portugal", a study co-ordinated by researchers from the Research Centre for Communication and Culture (CECC – Centro de Estudos de Comunicação e Cultura) at the School of Human Sciences (FCH – Faculdade de Ciências Humanas) of the Catholic University of Portugal (UCP – Universidade Católica Portuguesa) and specialists from GfK. This topic was also the subject of an analysis that included complementary indicators on deferred consumption.

This is the second "ERC – Public and Media Consumption" study and, like its 2014 predecessor, the survey database is available to the academic community and research centres. The aim of these studies is to improve our understanding of the changes we see in the public's relationship with the media, in order to provide qualified information to assist the ERC with its regulatory functions and to make this information available to all stakeholders (public bodies, associations, media professionals, entrepreneurs, researchers, teachers, students, citizens, among others). The first edition of the project focused on an analysis of the consumption of news on digital platforms, while the next edition focuses on the relationship between children and the media.

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