

Motivation based segmentation for the television content market: Uses and gratifications applied to the Colombian case

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Abstract

As online television has grown in the past few years, changing the dynamics of the conventional TV market, it has become increasingly important for telecom companies providing television services to better understand content consumption trends in order to provide customized packages and more accurate offers that can attract different market segments. With the objective of providing a general visualization of the television content market in Colombia, the present research presents a motivation based market segmentation through uses and gratifications theory, which was conducted by identifying four possible motivations associated with media consumption, such as social interaction, information seeking, entertainment needs and pass time, which were complemented with innovativeness construct as a personality characteristic of consumers. Five factorial exploratory analyzes were performed to create new variables with these constructs, these new variables, along with the weekly hours of content visualization were included in a hierarchical cluster analysis, which lead to the identification of four different clusters: Celu-Indifferents, Socializers, TV

Lovers, and Progressives. Significant differences were identified between clusters, as well as dependencies between the membership to each cluster and content consumption, preferred devices and platforms to access content and consumption behaviors.

The obtained results give a better understanding on current segments of multiplatform content consumption in the Colombian market, all which have different motivations to consume television content, as well as different consumptions behaviors. The results provide information for marketers to take informed decisions on how to target these segments, and thus, different kind of consumers in a relative unknown market in the country such as online television services. Ultimately, the research's outcomes provide validity to the proposed methodological technique, indicating that it can lead to a market segmentation based on motivations and consumption patterns beyond usual demographic variables.

Key words: multiplatform content, segmentation, uses and gratifications, cluster analysis)

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1. Introduction

Internet broadband adoption has rapidly expanded since mid-2000's, (Waterman, Sherman, & Wook Ji, 2013) with this expansion a variety of services have blossom, creating new business models with the birth of e-commerce and online services (Lim & Cham, 2015). As a result of this development, online streaming of TV shows and video content has presented a dramatically growth in the last decade (Waterman et al., 2013).

To exemplify, eMarketer (2016) described how households worldwide are slowing increasing online TV subscriptions with streaming companies, market that reached on February 2016 164.5 million subscribers in the United States (50.8% of the US population), showing how they are simultaneously decreasing traditional TV subscriptions. In this sense, a research performed by Lai, Yu, Tuan, & Kuo (2014), in the United States, shows how families are increasingly switching their traditional cable/ satellite TV, as telecom companies start to provide online TV platforms such as Netflix, Amazon Prime, Hulu or Apple TV that allow users to access content from any mobile device such as PC's, smartphones or tablets.

With this new ability of consumers to reach their online content at any given time and place, Mann et al., (2015) estimate that "from now on, understanding consumers and ensuring decision-making centered on consumer insights will both be increasingly key to the success and, ultimately, the survival of incumbent operators", emphasizing the importance of focusing on understanding the consumer's preferences and behaviors, as for the first time the technology will allow to provide personalized content offerings based on consumers preferences and behaviors, content recommendations and even tailored and personalized

advertising. Furthermore, Bruwer & Li (2017) explain the importance of understanding customers through market segmentations beyond demographic variables, proposing domain-specific segmentation wherein consumers are segmented on psychographic data that are specific to a set of consumption behaviors for a specific category, such as television.

However, despite the importance of understanding television content consumers, there is currently not enough information on user behavior to enhance their experience and help design a market specific business model (Shim, Park, & Shim, 2008) as little research has been done outside the United States regarding this subject. Although some researchers have moved their attention into European and Asian markets (Lim & Cham, 2015), there is no information specifically for the Latin-American market. As explained by Mee et al., (2015) “a lack of understanding on consumer preferences would result a successful strategy in one country to fail in another”, thus, results of researches done in developed markets should not be extrapolated to emerging countries since early markets are different from the developed ones for new technological innovations (Patsiotis, Hughes, Webber, & Hughes, 2012).

In the Colombian market, being at its early stages, local telecom companies trying to launch online TV services also entail a better understanding of market segments in order to attract and keep its market share. Nevertheless, no information is currently available regarding data analysis for market segmentation on television content and its relation to online TV services due to its recent nature. Because of this, several relevant questions for the local market arise: Which users are more likely to use these kind of services? How can these users be targeted from the marketing point of view? How to create customized services and offers for them? For this reasons, the present research pretends to identify a market segmentation of television content services in Colombia, focusing on multiplatform usage, categorizing consumers beyond demographics and creating profiles with key sought motivations of the consumer

types, innovativeness level and content preferences. The provided market segmentation pretends to be useful to telecom companies providing TV services during early stages of product development and marketing (Euromonitor International, 2015), providing a way to better understand and appeal to their target market.

For this, the present research is developed with multiplatform content consumption as its main research's framework, however, it ultimately intends to provide a valid methodological tool to achieve market segmentation beyond demographics, through a methodological exercise used to demonstrate that the proposed technique can lead to a market segmentation based on motivations and consumption patterns.

To achieve this goal, a theoretical framework was developed to contextualize the Colombian television market, followed by 'Uses and Gratifications theory' as base of possible motivations for mass media consumption, and a quantitative analysis to achieve the desired market segmentation. Finally, discussion of the results, managerial implications and research limitations are described to conclude on the obtained results and the research's validity.

2. Theoretical Framework

Colombian television market context

In Colombia, Television is considered a public service regulated by the State. According to the TV supervisory entity in the country *Autoridad Nacional de Televisión* (ANTV), this service can reach citizens mainly by three different ways; Open signal TV (broadcasting by air and TDT), Closed signal TV (conventional subscriptions through cable or satellite) and Internet (streaming services such as Netflix and similar) (ANTV, 2017).

Open signal TV currently has a wide coverage in the country and is free to use by anyone with a TV receiver, however only 12.1% of the Colombian TV market uses open signal as the primary way to watch content, with the wide majority (70.8%) accessing content mainly through conventional TV subscriptions (CRC, 2017). In 2016, conventional TV subscriptions alone represented a 2.9 Billion COP market (around 1 Billion USD) with 5.7 Million TV subscribers (ANTV, 2017). In average, Colombian households spend \$58,790 COP monthly on traditional TV Subscription and most of them have to bundle it with Internet and telephone access, where only 34.9% have standalone TV service (CRC, 2017).

Streaming services on the other hand, rely on internet access. Colombia is a country with 57.6% Internet penetration (MINTIC, 2017) which still leaves part of the population without access to online TV services, however, data suggests that the population who does have internet access, consumes video content through internet (either free or paid) (CRC, 2017). In 2014, Colombia reached 12.8 Million online video viewers with 535,000 of them having Netflix subscriptions (MINTIC, 2015), number that raised to 790,000 in 2015, putting Colombia as one of the top 10 Netflix markets outside the United States (NetImperative, 2016), showing how the market is growing on yearly basis.

On this sense, a 2017 report presented by the regulatory entity in communications, *Comisión de Regulación de Comunicaciones* (CRC), sheds light into the general preferences of the Colombian market for TV content visualization, where the average amount of devices to watch audiovisual content at home is: 1.4 Conventional TVs, 1.4 smartphones, 0.8 computers, 0.4 SmarTVs and 0.3 Tablets per household (CRC, 2017). However, despite the penetration of mobile devices, the report shows that Colombian users still prefer to watch content at

home; 82% watch linear content at home, and 70% access free online content such as YouTube at home as well (CRC, 2017). In terms of preferred devices, the report shows that 86% of users watch linear content on a conventional TV, the majority “because they do not have other options”, while services such as Netflix and YouTube are mostly watched on SmartTVs (72 and 41% respectively) (CRC, 2017).

The present study pretends to deeper characterize the Colombian television market, focusing on the dynamics of multiplatform usage and elaborating on consumption patterns per device and preferred access platform per content. The results aim to give a better understanding on consumption habits and motivations toward television content consumption.

Market segmentation

Market segmentation is a marketing tool that allows to divide heterogeneous consumers into homogenous groups that share similar characteristics, needs, or purchase behaviors (Park, Lim, Bhardwaj, & Kim, 2011; W. Shao, Ross, & Grace, 2015). Segmentation’s goal is to determine what observational demographics and behaviors can differentiate a segment from another in order to make need-based offerings tailored to particular consumer groups (Park et al., 2011).

Segmentation has been widely used to describe markets into behavioral consumer groups (Aljukhadar & Senecal, 2011; Hung & Tsai, 2008), according to Kotler & Keller (2012), there are several ways to achieve a market segmentation, they describe four broad categories of variables to describe such segments, this being: geographic, demographic, psychographic and behavioral characteristics. Traditionally, within the television content market, researchers

have often relied on the traditional methods of segmentation, such as demographic characteristics (Shim et al., 2008).

As demographic variables have been traditionally used as the main mean to describe market segments, the impact of educational level, age and gender to describe different consumption habits has been well established, linking its importance with technology adoption (Aljukhadar & Senecal, 2011; Lim & Cham, 2015). However, less information is available regarding market segments described beyond demographics. Having a deeper market segmentation would provide the means to organize the market into classes that allow systematic investigation and then, theory development, allowing marketers to take decisions tailored to customer's specific needs (G. Shao, 2012). For this reason, to achieve a more detailed segmentation, further variables should be included while describing groups of consumers, beyond the usual demographic aspects (Bruwer & Li, 2017).

Segmentations done beyond demographics may introduce psychological and behavioral characteristics such as consumption behaviors, decision making criteria and loyalty (Kımlıoğlu, Nasır, & Nasır, 2010), while others may include motivations and benefits sought as part of behavioral characteristics. Campbell, Ferraro, & Sands (2014) used motivations as a variable to segment consumers reaction to social media marketing and W. Shao, Ross, & Grace (2015) used them to create a motivation-based segmentation of Facebook users.

This later approach is supported on the uses and gratifications theory, suggesting that media consumption can be linked with several typical motives, this theory suggests that in order to understand why individuals consume content in different ways, one should understand the gratifications they are intending to fulfil (G. Shao, 2012). Thus, motivations can also impact on media usage and could be used to describe market segments (Mcelroy, Hendrickson, Townsend, & Demarie, 2007; W. Shao et al., 2015). For this reason, the variables included in

the current research surpassed demographic factors, encompassing characteristics for a deeper market segmentation.

Uses and gratifications

Uses and gratifications theory is an individual centered approach used to understand media usage, this theory states that individuals may use the same media for different purposes (Lee, Kim, Ryu, & Lee, 2011; W. Shao et al., 2015). Katz, Blumler, & Gurevitch (1973) proposed that audience has an active participation in media selection and that as media users, they are goal-oriented on their behavior, therefore they are motivated to use mass media while seeking for gratifications to satisfy their own perceived needs (Campbell et al., 2014; Ko, Cho, & Roberts, 2005; W. Shao et al., 2015). According to this theory, if the needs that each individual is trying to gratify are identified, then, specific media usage motivations can be determined (Campbell et al., 2014). In this sense, since individuals' motivations to use television may differ from one to another, and as uses and gratifications theory provides a useful overview of what motivates individuals for mass media consumption, then, it may become an effective basis for segmentation (Guttentag, Smith, Potwarka, & Havitz, 2017).

Uses and gratifications theory has been widely used by researchers as a way to identify individual's motivation in different media communications use, such as television, radio and internet (Campbell et al., 2014). This theory has generally identified three main benefits that people may obtain from media usage: cognitive benefits, social integrative benefits (related to someone's feeling of membership to a group), and hedonic benefits (Lee et al., 2011; Nambisan & Baron, 2007; Whiting & Williams, 2013). For this reason, current research will include variables for each main type of sought benefits on media consumption: social interaction needs, for social benefits, information seeking, for cognitive benefits and pass

time and entertainment needs for hedonic benefits. Additionally, as multiplatform content consumption is still at its early stages on the country, innovativeness will be included as one extra segmenting variable.

Including these variables will allow to identify market segments that describe what stimuli are preferred by television viewers, and their level of innovation, providing further understanding to television service providers on the proper way to package content tailored to the Colombian market so it is more likely to catch consumers' attention and influence its purchase. Each dimension and its relation with market segmentation is defined on the following sections.

Social interaction

As part of the uses and gratifications theory, social gratifications have been identified as an important motivation among customers, driving a desire to connect and interact with other people (Aluri, Slevitch, Larzelere, & Larzelere, 2015). Social interaction it's a specific social gratification that involves establishing and maintaining relationships, meeting new people and keep contact with others to feel less lonely (Flanagin & Metzger, 2001), in this sense, social interaction implies a desire to communicate and build relationships.

In regards to media consumption, it has been found that within existing social groups, individuals can use social media to feel connected and develop common ground (Gao & Feng, 2016). For gratifying socialization needs, an user could use online services in order to get to know people and maintain relationships in real life, creating a sense of community (Al-Jabri, Sohail, & Ndubisi, 2015).

Katz et al (1974) described how gratifications that are voluntarily seek are usually related with self-fulfilling, which increases an individual's positive attitude to the source of satisfaction (Ji & Fu, 2013). Since social gratifications are often voluntary as users can choose how and with whom they interact (in contrast of how information needs have become necessary), social interaction gratifications will be used in the current research as a possible motivation to consume television and a driver to choose different television content. Also, since social interaction needs can exist not only to create new friendships but also to reinforce current offline social interaction (Al-Jabri et al., 2015), it will be included as a way to segment consumers into those who have desires to stay in touch with acquaintances and reinforce their current bonds.

Information seeking

Information seeking is defined as an active effort to obtain information outside the normal patterns of exposure as a response to a gap of knowledge (Asghar, 2015; Whiting & Williams, 2013). Information seeking usually comes from an individual's need to increase his knowledge of the world (G. Shao, 2012), thus, it relates to uses and gratifications theory as some people may use media to search for information or to educate themselves (Whiting & Williams, 2013).

As with other motivations, information seeking can be found across different media, including television, radio, newspapers, and Internet (Kavanaugh, Sheetz, Sandoval-almazan, Tedesco, & Fox, 2016), and it's been found to predict higher cognitive involvement with particular television programs than with television viewing per se (Ji & Fu, 2013). For instance, some researchers have found that needs such as relaxation, entertainment, companionship, and social gratifications were not as important as information-seeking in television usage, especially for news content, when situations of contention or uncertainty

(Kavanaugh et al., 2016). For this reason, information seeking will be included as a motivation for content consumption.

Pass Time

Pass time is defined as “using social media to occupy time and relieve boredom” (Whiting & Williams, 2013), this gratification is related to media consumption as a way to fill up free time when a consumer is bored or free, and he / she can find interesting things from that particular media (Gan, Wang, & Gan, 2015).

Contrary to information seeking, an instrumental gratification that predicts higher cognitive involvement with particular television programs, pass time is a ritualistic gratification which requires a lower level of user activity (Ji & Fu, 2013). As Pursuers of ritualistic gratifications use media without clearly defined purposes, they have less active, less intentional, and less selective motivations to act and achieve specific goals when spending time with media. The more they seek ritualistic gratifications, the more they feel attached to a medium itself rather than to any particular content delivered by it (Ji & Fu, 2013). For this reason, pass time was included as a possible motivation that could give a clearer view on a possible market segment of users that use television services for time killing purposes and might be generally indifferent to particular content.

Entertainment needs

Entertainment is defined as a hedonic gratification which provides enjoyment for individuals (Gallego, Bueno, & Noyes, 2016), indicating that media serves as a mean for escaping pressure and entertain, satisfying a need for emotional release and relief of anxiety (Asnira & Kamarulzaman, 2015).

Theory suggests that people differ in their habitual seeking of experiences and consumption of media from which they derive entertainment, in such a way that people who often look for entertainment may be more susceptible to the public narratives, and message acceptance processes (Brock & Livingston, 2004). This way, a higher entertainment value it's been found to have a greater motivation on media users to consume content more often (Gallego et al., 2016), which means that entertainment may be more important in triggering media use than information seeking motivation (G. Shao, 2012).

For this reason, as gratifications impact affinity for television or for specific programs (Rubin, 1981), content consumption can be affected by an individual's level of entertainment needs, thus, it will be included as a hedonic gratification for the market segmentation.

Innovativeness

The theory of innovative behavior was presented by Rogers & Shoemaker (1971) as “the degree to which an individual is relatively earlier in adopting an innovation than other members of his system” (Midgley & Dowling, 1978). Since, the innovativeness construct has been used to describe and measure a personal propensity to adopt new trends and buy new and different products before others, instead of sticking to previous patterns of consumption (Jin, 2016; Lim & Cham, 2015; Rašković, Ding, Škare, Ozretić Došen, & Žabkar, 2016).

Innovativeness can also be defined as a personal tendency to take risks, which arises in a greater degree in some individuals than in others. Innovative individuals are disposed to try new things and thus, take chances as they are able to manage higher levels of uncertainty (Thakur, Angriawan, & Summey, 2016), on the other hand, non-innovators are less likely to take risks in comparison to innovative individuals and usually are forewarned when choosing new products (Jin, 2016; Thakur et al., 2016). This way, innovators tend to have a more

extensive technological knowledge, as they actively seek for information regarding new products, and try to understand technological innovation in the market (Jin, 2016; Lim & Cham, 2015).

The innovativeness construct is often used in marketing literature for segmenting consumers between innovative and non-innovative (Agarwal & Prasad, 1998; Thakur et al., 2016). In general, it is said that innovators do not worry as much about the lack of information or risks that may result from trying a new product and they are more inclined to look for new technologies, which leads to a greater adoption intention. However, the adoption intention for non-innovators is weaker as they have a higher attention to the ambiguity involved when choosing a new product. Thus, a correlation has been found between the innovation degree of an individual, and its technology adoption (Jin, 2016; Lim & Cham, 2015; Rašković et al., 2016; Thakur et al., 2016).

For this reason, although the innovativeness construct is not a motivation but a personal characteristic, it will be included as an extra dimension for the market segmentation to include the customer's specific level of innovation and have a general idea on their willingness to adopt multiplatform television services.

This way, as is intended to identify market segments in the Colombian market for TV content, the previously described constructs will be used to segment consumers based on their sought benefits. Innovativeness will also be used as part of the segmentation, as it's intended to identify better ways to target consumers of multiplatform content, which is still consider a new and innovative service in the country. As a results these five variables (social interaction, information seeking, entertainment needs, pass time and innovativeness) were used to identify

and describe different types of television consumers. The used method and outcomes' descriptions are specified in the following sections.

3. Method

With the previously described literature review, it was possible to design a measurement instrument based on the chosen variables, which intended to measure each selected motivation. For each construct the validity of its content was guaranteed by using existing scales in the literature, adapting them to the specific context of the present study. Table 1 presents the used items and its source, each of which was measured in a 1 to 5 liker scale.

For purposes of this study, "watching television" is understood as viewing television content (series, movies, video clips, documentaries, news, etc.) on different devices such as television, tablet, cellular, computer or similar. This definition was described in the survey, and Annex 1 presents the translated questions used on the questioner. In addition, the instrument also measured content and platform preferences, most frequent used devices, and socio demographic aspects.

Table 1. Used items in the instrument

For each of the following statements, indicate the level of agreement or disagreement you have with the reasons why you watch television (1 = strongly disagree, 5 = strongly agree).	
<i>Item</i>	<i>Source</i>
<i>Social Interaction</i>	
So I can communicate with my friends	(Gao & Feng, 2016)
To socialize	(Zolkepli & Kamarulzaman,
To stay in touch with others	(Khan, 2017)
To strengthen my existing relationship with others	(Al-Jabri et al., 2015)
<i>Information seeking</i>	
To learn how to do things	(Lee et al., 2011)
To learn about unknown things	(Ko et al., 2005)

To learn about useful things	(Ko et al., 2005)
Because I can use it to collect information for future use	(Gao & Feng, 2016)
Because I can learn a lot	(Gao & Feng, 2016)
<i>Entertainment needs</i>	
Because it is entertaining	(W. Shao et al., 2015)
Because it is exciting	(W. Shao et al., 2015)
To relax	(Lee et al., 2011)
Because it is enjoyable	(Ko et al., 2005)
I just like to watch TV	(Ko et al., 2005)
<i>Pass Time</i>	
Because I'm bored	(Baek, Holton, Harp, & Yaschur, 2011)
Because I have nothing better to do	(Baek et al., 2011)
Because it's a habit	(Baek et al., 2011)
Because it gives me something to do to occupy my time	(Smock, Ellison, Lampe, & Wohn, 2011)
Just because it's on	(Rubin & Perse, 1987)
Indicate the degree of agreement or disagreement in which you find the following statements (1 = strongly disagree, 5 = strongly agree).	
<i>Innovativeness</i>	
New products are usually gimmicks ®	(Thakur et al., 2016)
I like to experiment with new ways of doing things	(Thakur et al., 2016)
Among my peers, I am usually the first to try out new products and technologies	(Agarwal & Prasad, 1998)
I like to keep up with new technologies	(Agarwal & Prasad, 1998)
I am very curious about new information technology and products	(Jin, 2016)

Source: Own elaboration.

The designed instrument was used to collect information through a simple transversal design, with a sample chosen by convenience and an online self-applied structured questioner. As the present research focuses on multiplatform content market, the survey could be answered regardless of the method used to access to television content (Open signal, Closed signal or internet). Nevertheless, in an intent to get closer to a population who in fact makes use of multiplatform content, the survey was delivered through email, targeting a population with

internet access, and thus, to multiplatform users. In this sense, the relation of the sample with the digital world, is a descriptive factor of the sample.

The questioner was distributed in Colombia's main cities: Medellín, Bogotá, Barranquilla and Cali to 500,000 individuals from a marketing database from which 1,234 individuals completed the questioner.

The gender distribution of the sample was 57.3% man and 42.7% woman, 40% of the sample had ages between 35 and 49 years old, with 44.7% of singles and 35% being married. The sample was mainly high educated with 80.1% having a bachelor degree or higher and mostly employed by a company (62.65%). More detailed sample characteristics are presented in Table 2.

Table 2. Demographic sample characteristics

<i>Variable</i>		<i>Percent</i>
Gender	Female	42.7
	Male	57.3
Age	14-24	8.8
	25-34	33.1
	35-49	40.0
	50-64	16.3
	65 +	1.8
Marital Status	Single	44.7
	Married	35.0
	Divorced	5.3
	Widowed	.7
	Single, living with a significant other	14.3
Education	Less than high school	.4
	High school graduated	4.1
	Technical school	15.3
	Bachelor's degree	38.2
	Specialist	22.4
	Graduate degree (master or doctoral)	19.5
Occupation	Student	8.5
	Employed	62.6
	Independent	21.4

	Housekeeper	1.2
	Unemployed	3.5
	Retired	2.8
Monthly Income	I don't have an income	7.9
	Less than the minimum wage	4.1
	Between a minimum wage and \$1.500.000	17.7
	\$1.500.001 - \$2.500.000	17.8
	\$2.500.001 - \$3.500.000	15.6
	\$3.500.001 - \$4.500.000	12.3
	\$4.500.001 - \$5.500.000	7.9
	\$5.500.001 or more	16.8

Source: Own elaboration.

Current operator was requested in the Survey, including Colombia's main TV operators as Subscription TV is still the most common access method in the country, nevertheless, an extra option "Other" was added for user that access the service through different channels such as Open Signal or Internet. The distribution of the sample per operator and city is described below.

Table 3. Sample characteristics

<i>Variable</i>		<i>Percent</i>
City	Medellín	46.6
	Bogotá	32
	Barranquilla	2.8
	Cali	8.4
	Other	10.2
Operator	UNE Telecomunicaciones	25.5
	EdateL	.1
	CLARO	35.5
	ETB	5.8
	EMCALI	.4
	DirecTV	16.5
	Movistar	4.9
	Other	11.3

Source: Own elaboration.

4. Analysis and results

Following on other motivation based segmentation researches in the literature, such as the ones performed by Allan & Shavanddasht (2017) and Guttentag, Smith, Potwarka, & Havitz (2017), two different techniques were used to segment the collected data: factorial analysis by principal components and hierarchical cluster analysis, both which were performed using SPSS 19. The first technique was used to reduce the amount of construct items to new grouped variables (one per construct), the second to group individuals in similar clusters that share values within itself.

The reliability of the constructs (social interaction, information seeking, pass time, entertainment needs and innovativeness) was verified through the alpha of Cronbach, which was above 0.8 for all cases. In addition, an exploratory factorial analysis by principal components was performed for each construct, using varimax rotation, in such way that it was possible to identify one factor that summarized the items of all scales of the construct, thus, creating a new grouped variable. This approach was performed instead of just one factorial analysis for all the items because the latent structure of the data was already known from the selection process of the scales for the measurements.

Each of the principal components analysis had good KMO values, passed Bartlett's Test of Sphericity and had a high percentage of variance explained, all of which is shown in Table 4. Only the first scale of Innovativeness construct was eliminated because its load over the factor was low and so was its extracted communality, for this reason the researchers decided that the information of the factor did not represent a reliable summary measure.

Table 4. Exploratory factorial analysis application criteria

	<i>Social Interaction</i>	<i>Information Seeking</i>	<i>Entertainment Needs</i>	<i>Pass Time</i>	<i>Innovativeness</i>
KMO	.865	.894	.882	.779	.769
Bartlett's Sphericity Sig	.000	.000	.000	.000	.000
% Explained Variance	87.605	81.716	71.413	56.810	71.659
Cronbach's Alpha	.953	.943	.893	.809	.866
Items	4	5	5	5	4

Source: Own elaboration.

The segmentation exercise was carried out in two steps, in the first, five new variables were created by saving the factorial scores of the analysis by principal components, as previously described. In the second, a hierarchical cluster analysis was performed using Ward method with Euclidean distance as measurement element. For the analysis, the five new variables were used as well as the weekly hours of television content visualization, which was filled by the respondents. The variables were standardized using z-scores.

Per its wide use in the literature, the cluster analysis was performed using Ward method with Euclidian distance as this method provides a hierarchical clustering algorithm that tends to provide clusters of approximately equal size due to its minimization of within-group variation (Hair, Black, Babin, & Anderson, 2006), the outcome showed a dendrogram which was analyzed to define the amount of segments, four were chosen per the researchers criteria based on the distance jump below this number and the significant differences between the used variables with this amount, which are indicated in Table 6. Since no homoscedasticity was present, the comparison of means was performed under the calculation and significance of the H indicator of Kruskal Wallis, as a non-parametric test, obtaining the confirmation of differences. Subsequently, cross tables were established with content and device preferences for television visualization and demographic variables, using the chi square test to verify the statistical association between cluster membership and the mentioned variables.

The obtained results after the analysis indicate that conventional television is still leader in terms of access method, where 80.1% of the sample has a local TV subscription, complementary, there is evidence of general use of free content pages such as YouTube (61.59%). It was found that online streaming platform subscriptions are increasing, in such way that 60.37% of the sample has streaming services such as Netflix, Amazon Prime and similar. Also, the results showed that the most common time to watch content for the sample is in the afternoons. Table 5 indicates the sample's distribution per content watching times and used channels to access content.

Table 5. Sample characteristics

<i>Variable</i>	<i>Percent</i>	
Content Viewing Times	Between 6am and 10am	14.11
	Between 10am and 12am	2.39
	Between 12 am and 2 pm	8.87
	Between 2pm and 6 pm	4.89
	Between 6pm and 10 pm	84.3
	After 10 pm	38.57
Used Channel	Streaming Platforms	60.37
	Conventional TV Subscription	80.31
	Free Content Pages (ie YouTube)	61.59
	Not Official web pages	18.15
	Other	4.94

Source: Own elaboration.

The data also showed that even though the largest percentage of the sample is subscribed to conventional television, and this is still the preferred medium for viewing content as news, series and movies are viewed primarily on computers or televisions connected to mobile devices or SmarTVs, indicating that movies and series are mostly seen on online streaming platforms.

Although these are the general trends, the four identified segments showed differences in terms of consumption behaviors and sought benefits (Figure 1). These four segments were identified by verifying the highest motivations within the cluster and the average hours of television viewing per week, then it was reviewed how these factors affected the frequency of content consumption per week and the preferences of devices to visualize that content. This way, four main segments were found: *Celu-Indifferents*, *TV Lovers*, *Socializers* and *Progressives*. Each of these clusters are described below, taking into account only those variables in which statistical association with membership of the cluster was identified. For this reason, demographic information within each cluster is not characterized, as no statistical associativity was found in terms of gender, age, marital status or occupation with cluster membership. Only two demographic variables (income and education) were found to have influence on membership of one specific cluster (*Progressives*). However, differences in terms of motivations, frequency use, viewing times, devices, content and multiplatform use were found to be statistically relevant for all clusters.

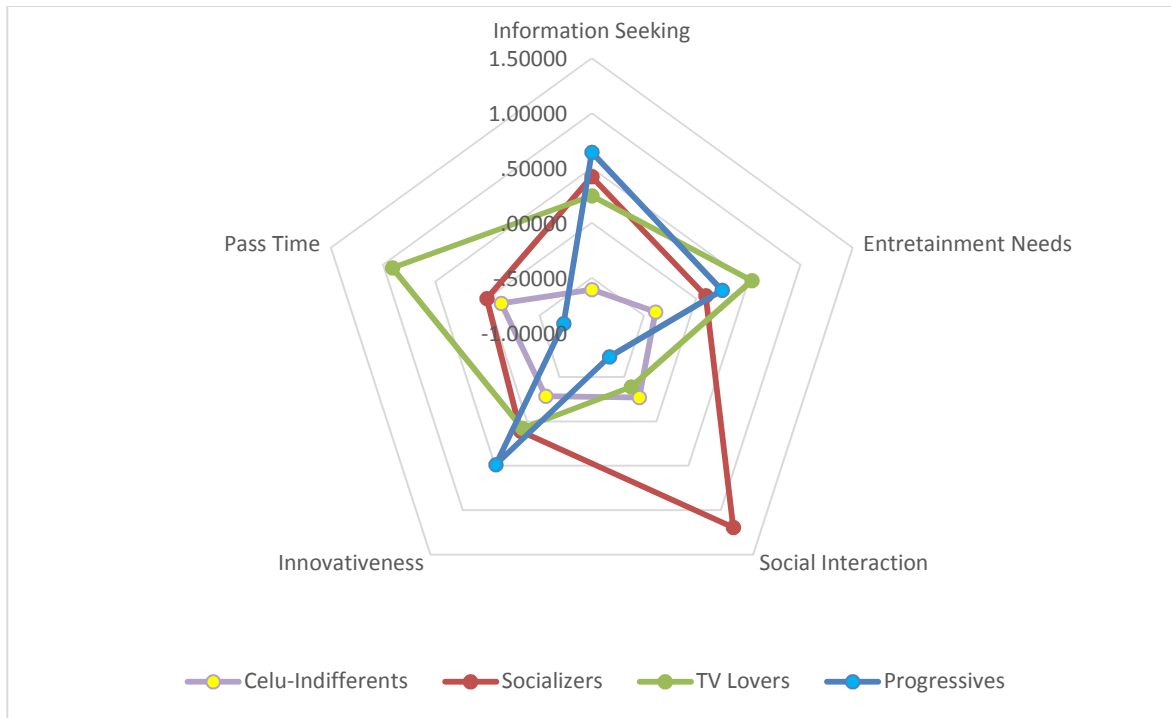
Each cluster and its specific consumption patterns are described below.

Table 6. Comparison between the variables used for the cluster conformation

	<i>Celu-Indifferents</i>	<i>Socializers</i>	<i>TV Lovers</i>	<i>Progressives</i>
N =	508	306	227	193
Use Frequency (weekly hours)	12.61	15.50	28.08	14.32
Information Seeking	-.60878	.42120	.24727	.64376
Entertainment Needs	-.38858	.09212	.53442	.24816
Social Interaction	-.26785	1.19249	-.38922	-.72789
Innovativeness	-.28507	.10887	.07685	.48734
Pass Time	-.13355	.00697	.91113	-.73117

Source: Own elaboration.

Figure 1.Clusters' conformation



Source: Own elaboration.

Celu-Indifferents

Celu-Indifferents (n = 508) have the lowest average of content display per week (12.61 hours), this segment is conformed by people with no apparent motivation towards television viewing and towards type of content. Celu-Indifferents have the lowest predisposition to watch sports and video clips, where 38.58% of them do not watch the latest and 48.03% watch it less than 4 times a week. In relation to the other segments, they present the highest proportion of mobile phone usage for all types of content visualization; however, their low motivation to voluntarily expose themselves to television content decreases their inclination to have conventional TV subscription, being the segment with the lowest percentage of subscription to this service (76.77%). In essence, Celu-Indifferents are in general indifferent to television viewing, they have the lowest average of content visualization per week, the

lowest percentage of TV subscriptions at home, the lowest motivation towards content consumption, but, when they do watch TV, they do it more often on cellphones than the rest of clusters.

Socializers

Socializers (n = 306) have a television viewing average of 15.50 hours per week, this segment is highly motivated by social interaction and have the higher visualization of documentaries within all clusters, where 41.83% watch this kind of content more than 3 times a week. Socializers also present high preferences towards watching news and sports, watching these more than 3 times a week (68.95% and 43.79% respectively), showing their propensity to watch content they can talk about later with others. This segment keeps using TVs as the preferred device to watch content and presents the higher visualization content at midday (13.39%) in comparison with the rest of clusters (average 8.87%).

TV Lovers

TV Lovers (n = 227) have the highest average of TV usage per week (28.08 hours). This cluster shows the most disperse TV viewing times, sparse all through the day. TV Lovers have a high need for entertainment and pass time, and present the higher percentage of visualization of series and movies (88.55% and 81.06% watch these at least once a week). When it comes to the reasons why they watch TV, they have low motivation to social interaction, meaning they are not motivated to consume content to socialize it or spend time with others, rather, TV Lovers have hedonic motivations (entertainment and pass time) that relate more to an attachment to television rather than to content itself. This cluster watches content mainly through a conventional TV subscription, still, they show usage of diverse

visualization platforms such as online pages, for which they have a superior multiplatform usage in comparison with other segments.

Progressives

The group of progressives (n = 193) watch TV on average 14.32 hours a week, they have the highest level of innovativeness of all segments and the highest need for information seeking, being driven secondly by entertainment needs. Movies and series are regularly present in this segment at least once a week, content is most frequently watch by progressives in TVs connected to a mobile device or SmarTVs, thus, this cluster has the higher percentage of subscriptions to streaming services such as Netflix (68.39%).

Progressives have the highest income among the identified segments (45.6% of them earn more than \$3.5 Million COP per month), and the most educated participation with 49.74% of them having specializations or graduate degrees, being the only segment which has a demographic variable that has statistical association with the cluster's membership.

This way, the four identified segments show significant differences between each other in term of motivations and consumption patterns for television services. The theoretical and managerial implications of the obtained results are discussed below.

5. Discussion and conclusions

Segmentation is of high importance to marketing and business strategies of organizations, as described, current developing technologies are giving the opportunity to marketers and telecom companies to provide tailored and personalized products based on their consumption patterns. For this reason, understanding a customer's behavior and motivations becomes relevant for a successful strategy.

In the case of television content market, segmentation by motivations, based on uses and gratifications theory and complemented with personality variables proves to be useful to characterize homogeneous groups of consumers that present different preferences and behaviors while using television platforms. The developed exercise, on an exploratory scale, shows that motivations of individuals to consume television, are related to the gratifications they consciously seek, and that these motivations affect their consumption patterns. In this sense, the obtained results demonstrate that the chosen constructs are valid for market segmentation, as they showed significant differences between the clusters and their influence on consumption trends, thus, segmenting through the identified motivations, is of high importance compared to the traditional segmentation by demographic variables, as only a relation between the income level and education with one cluster's membership was identified; other variables such as gender, age, occupation or marital status did not imply associations that statistically support their influence with the identified segments membership, which supports the initial supposition that market segmentation should be done beyond demographics.

Furthermore, the methodological approach proves to be useful in such way that it was possible to identify a way to group scale items of constructs through an exploratory factorial analysis, which allowed to perform a cluster analysis with grouped variables instead of an approach which used all the items of the constructs, showing validity on the method for this kind of segmentation.

The research's outcomes however, present valid information that should not be extrapolated to the Colombian population in general, as they are far from the Colombian universe. The sample, as described before, intends to provide information on a population that already has a

relation with the digital world. Thus, the segmented universe corresponds to a proportion of the Colombian market that has internet access. This can be observed in the socio-economic distribution of the sample in which 80.1% has higher education (a bachelor degree or more), versus the Colombian reality (11%) (DANE, 2016), and 60.37% of the sample has a streaming service subscription, versus the Colombian reality (less than 2%) (CRC, 2017). Thus, the present results should be used to target a population that has a relation with the digital world.

As for the managerial implications of the current research, general consumption trends of the sample show that subscription to conventional TV services continues to be the preferred access channel for television, nevertheless, streaming services such as Netflix keep increasing, reaching 60.3% of the sample. This results illustrate how the market might be shifting to a multiplatform subscription; complementing the traditional TV services for linear channels with streaming platforms that allow access to on demand content, which can be identified by the general preference of service, in which News are still seen in the conventional TV services, and movies and series in streaming platforms. Sports, however where found to be watch in both conventional TV and streaming platforms.

The relevance of the results rely in the realization that telecom companies that provide TV subscriptions should move to a bundled or complimentary subscription model that allows users to have both, the conventional TV service and a streaming application through subscription packages or advanced services that unify the experience between conventional channels and on demand content of online streaming platforms. In turn, the fact that local content, such as news is seen mainly in conventional television, may indicate a lack of availability of this content on mobile platforms, this point implies an opportunity for

broadcasting channels, which could launch their streaming services with local content, in which case it would be beneficial to verify attitude of consumers to see local content (such as news, soap operas or reality shows) on mobile platforms.

This found scenario for the sample, illustrating how in Colombia the evolution of content through online TV is found as a complement more than a substitution of the conventional TV subscription, can be verified in 2017 CRC's report and MINTIC's data which shows constant increase in TV subscribers on yearly basis as well as a high preference to linear content (CRC, 2017), while online subscriptions to streaming services also increase on yearly basis (MINTIC, 2015). Thus, the results of the present study agree with general literature that suggests that researches done in developed markets should not be extrapolated to emerging countries as the trend in the US has been quite different (eMarketer, 2015; Patsiotis et al., 2012).

This way, the obtained results also allow to close current gaps in the literature, since no approach had been performed for in the Latin-American market in order to understand content consumption patterns nor market segmentations for such services in the region. For the Colombian case, the present research also represents a first approach to understand trends and a wide market characterization, giving validity to the present outcomes.

In terms on device preferences, it was also identified that tablets are still not frequently used to watch television content, as this is the less frequent device to access it, this means that, although television providers should focus efforts for the cross-platform integration of television content such as computers and cell phones in Colombia, tablets should not be a priority in mobile development efforts.

Also, the results give visibility to the television operators regarding segments of the market to whom they should focus efforts and the possible ways to present personalized offers based on their motivations. The provided market segmentation is useful for TV service operators during early stages of product development and marketing, providing a way to better understand and appeal to the target market, providing a tool to operate from a strategic perspective, with a differentiated offering per cluster.

Socializers, for instance, having a high motivation toward watching TV in order to have social interaction, are trying to fulfill a need to connect with others, to maintain existing relationships and meet new people. Socializers have the highest visualization of documentaries, news and sports, which they can use to talk about with their acquaintances. Thus, this group will probably respond to communication campaigns focused on the social interaction that TV allows, either by sharing moments of television viewing with friends or family, the possibility of talking and interacting with close people regarding the latest events in their favorite shows or even the possibility of connecting and sharing the content displayed on social networks.

Celu-Indifferents, do not have a specific motivation toward content consumption, but they have the highest usage of smartphones to watch content, in this sense, this group could be targeted by emphasizing the benefits of the mobility allowed by an app that permits content visualization, anytime, anywhere.

TV Lovers, on the other hand, are mainly motivated by ritualistic benefits such as pass time, and hedonic benefits as entertainment needs. The results confirm the theory, which shows how these two motivations are closely related with a more often content consumption, being

the cluster with the highest weekly hours of TV watching, thus, this could be an important segment for TV services operators, as it contains the subscribers' base which is more attached to television itself rather than to any particular content. TV Lovers watch content mainly through conventional TV subscription, still, they show usage of diverse visualization platforms such as online pages, for which they have a superior multiplatform usage in comparison with other segments, meaning they could benefit from a bundled subscription, between conventional TV service, complemented with a streaming subscription (ie, to Netflix). Finally, appealing to their main motivations, TV Lovers could be more attracted to advertising communications that appeal to entertainment, spending time and in general and the possibility to "disconnect" while watching television.

Lastly, Progressives have the highest motivation toward information seeking, as such, this cluster should have a higher cognitive involvement with content and look for information that will allow them to close knowledge gaps, they are individuals who need to increase their knowledge of the world, still, Progressives also have entertainment needs and look for TV as a source of relaxation. This cluster could also be of interest to TV service providers as it has the highest income and innovativeness level, meaning they are most likely to try new and innovative products and services, and have the economic means to access to them. As Progressives have the highest visualization of series and movies, and the highest access to streaming platforms, they could be target for multiplatforms proposals or standalone streaming services. Communication campaigns for this cluster could aim to new and innovative services that allow to access information and knowledge.

This way, the obtained results comply with the main objective of the current research, validating a segmentation beyond demographic variables and giving a wide and introductory

view of this emerging market to telecom companies, granting information on how to create more personalized offers and general market trends. The model showcases a tool that could be executable from the strategic view of a company, providing differentiated offers to different market segments. The relevance of this work lies in the fact that conventional TV service providers need to understand the market evolution introduced by new streaming services such as Netflix in order to keep up with its changes. As a result, the present study grants visibility on ways to provide complimentary subscription models that could benefit both parties (traditional versus new streaming services).

To finalize, the main limitation for the present research is outlined on the sample chosen by convenience, since the questioner was distributed through email to a specific marketing database in order to approach multiplatform content consumers. This way, the research reached only TV consumers with internet access, and thus, the respondents were already digital media users. This slant can be also be identified in the sample's demographic distribution, which showed higher education and income levels than the Colombian average. As a consequence, the used sample cannot be extrapolated to the Colombian consumer but to a Colombian consumer who has internet access and uses digital content, which does not reach a wide sector of the country such as rural areas or lower income households.

Lastly, as a possible continuation of the present study, it is recommended to complement the current market segmentation with extra measurements that could lead to the identification of lifestyles, which, although outlined from the variables used in the present study, can be enriched by measurements of attitudes, interests, opinions and activities performed during free time, giving visibility to more in depth consumption behaviors.

The present work could also lead to a future research that provides the ability to identify to what segment a particular customer belongs through the identification of key variables that define segment membership, giving a tool for companies to segment their current customer base and implement targeted marketing campaigns.

Furthermore, service adoption of the described online services and the segmentation outcome could also be linked with technology acceptance models or planned behavior theory as an attempt to understand why people adopt or reject multiplatform content services.

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7. Annex 1

CUESTIONARIO USOS DE SOPORTES TELEVISIVOS

Con el fin conocer y evaluar los diferentes tipos de usos televisivos, agradecemos su tiempo para contestar las siguientes preguntas de forma sincera y así contribuir a esta investigación. La información obtenida se utilizará para fines académicos.

NOTA: Para propósitos de esta encuesta, “ver Televisión” se entiende como ver contenido televisivo (series, películas, video clips, documentales, noticias, etc) en diferentes dispositivos como televisor, tableta, celular, computador o similares.

1. Indique el grado de acuerdo o desacuerdo en que se encuentra con las siguientes afirmaciones

(1 = muy en desacuerdo; 5 = muy de acuerdo)

I1	Creo que los productos nuevos usualmente son inútiles o improductivos	1	2	3	4	5
I2	Me gusta experimentar nuevas formas de hacer las cosas	1	2	3	4	5
I3	Usualmente soy de las primeras personas que pruebo un nuevo producto	1	2	3	4	5
I4	Me gusta mantenerme al tanto de nuevas tecnologías	1	2	3	4	5
I5	Soy muy curioso respecto a nuevas tecnologías y productos	1	2	3	4	5

2. Para cada una de las siguientes afirmaciones, indique el grado de acuerdo o desacuerdo en que se encuentra con las razones por las cuales ve televisión (1 = muy en desacuerdo; 5 = muy de acuerdo)

SI1	Para poder interactuar con mis amigos	1	2	3	4	5
SI2	Para socializar	1	2	3	4	5
SI3	Para mantenerme en contacto con otros	1	2	3	4	5
SI4	Para fortalecer mis relaciones existentes con otros	1	2	3	4	5
IS1	Para aprender a hacer cosas	1	2	3	4	5
IS2	Para aprender sobre cosas nuevas	1	2	3	4	5

IS3	Para aprender sobre cosas útiles	1	2	3	4	5
IS4	Para adquirir información que puedo usar en el futuro	1	2	3	4	5
IS5	Porque puedo aprender mucho	1	2	3	4	5
E1	Porque es entretenido	1	2	3	4	5
E2	Porque es emocionante	1	2	3	4	5
E3	Para relajarme	1	2	3	4	5
E4	Porque lo disfruto	1	2	3	4	5
E5	Simplemente me gusta ver televisión	1	2	3	4	5
PT1	Porque estoy aburrida / aburrido	1	2	3	4	5
PT2	Porque no hay nada mejor que hacer	1	2	3	4	5
PT3	Porque es un hábito	1	2	3	4	5
PT4	Porque es algo en lo que puedo ocupar mi tiempo	1	2	3	4	5
PT5	Solo porque el televisor está prendido	1	2	3	4	5

3. Por favor indicar la cantidad aproximada de veces por semana que ve el siguiente tipo de contenido

		(1) No veo este tipo de contenido	(2) Menos de 1 vez por semana	(3) 1 o 2 veces por semana	(4) 3 o 4 veces por semana	(5) 5 o 6 veces por semana	(6) 7 o más veces por semana
FC1	Películas						
FC2	Series						
FC3	Documentales						
FC4	Noticias						
FC5	Deportes / Partidos						
FC6	Video Clips						

4. Teniendo en cuenta la calidad de experiencia y disponibilidad en diversos horarios del día, por favor seleccionar el dispositivo en el cual usted prefiere ver los siguientes tipos de contenido.

		(1) Computador	(2) Celular	(3) Tableta	(4) Televisor	(5) No veo este tipo de contenido
DP1	Películas					
DP2	Series					
DP3	Documentales					
DP4	Noticias					

DP5	Deportes / Partidos					
DP6	Video Clips					

5. Teniendo en cuenta que quizá no siempre puede ver contenido en su dispositivo preferido, por favor seleccionar el dispositivo que usa con mayor frecuencia al momento de acceder a los diferentes tipos de contenido.

		(1) Computador	(2) Celular	(3) Tableta	(4) Televisor (señal convencion al)	(5) Televisor conectado a dispositivo móvil o SmarTV	(6) No veo este tipo de contenido
DF1	Películas						
DF2	Series						
DF3	Documentales						
DF4	Noticias						
DF5	Deportes / Partidos						
DF6	Video Clips						

6. ¿Cuál o cuáles de los siguientes canales usa actualmente para acceder a diferente tipo de contenido televisivo?

C1	Suscripción a plataformas de streaming online (Ej: Netflix, Amazon Prime, CLARO Video y similares)	1
C2	Operador de televisión convencional (UNE, DirecTV, CLARO, etc)	2
C3	Páginas web de contenido libre (YouTube o similares)	3
C4	Páginas web no oficiales	4

C5	Otro	5
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7. ¿En cuál o cuáles de los siguientes horarios usualmente ve televisión en días de semana?

(Lunes a Viernes)

HT1	Entre 6 am y 10 am	1
HT2	Entre 10 am y 12 am	2
HT3	Entre 12 am y 2 pm	3
HT4	Entre 2 pm y 6 pm	4
HT5	Entre 6 pm y 10 pm	5
HT6	De 10 pm en adelante	6

8. (FU) Teniendo en cuenta que para propósitos de esta encuesta, “ver Televisión” se entiende como ver series, películas, video clips, documentales, noticias, etc en diferentes dispositivos como televisor, tableta, celular, computador o similares. Aproximadamente, ¿Cuántas horas a la semana ve televisión? (Lunes a Domingo)_____

9. (D1) Edad:

De 14 a 24 años	1
De 25 a 34 años	2
De 35 a 49 años	3
De 50 a 64 años	4
65 o mayor	5

10. (D2) Género:

Femenino	1
Masculino	2
Otro	3

11. (D3) Estado civil:

Soltero(a)	1
Casad(a)	2
Divorciado(a)	3
Viudo(a)	4
Union Libre	5

12. (D4) Nivel de estudios

Bachillerato incompleto	1
Bachillerato completo	2
Técnica/Tecnología	3
Profesional	4
Especialista	5
Maestría o Doctorado	6

13. (D5) Ocupación

Estudiante	1
Empleado	2
Independiente	3
Ama de casa	4
Desempleado(a)	5
Pensionado(a)	6

14. (D6) Identifique su nivel de ingresos en una de las siguientes opciones

No percibo un salario	1
Menos de un salario mínimo	2
Entre un salario mínimo y \$1.500.000	3
Entre \$1.500.001 y \$2.500.000	4
Entre \$2.500.001 y \$3.500.000	5
Entre \$3.500.001 y \$4.500.000	6
Entre \$4.500.001 y \$5.500.000	7
Más de \$5.500.001	8

15. (CU) Seleccione la ciudad en la que vive actualmente

Medellín	1
Bogotá	2
Barranquilla	3
Cali	4
Otra	5

16. (OT) Seleccione el operador con el cual tiene contratado su servicio de Televisión tradicional.

UNE Telecomunicaciones	1
EDATEL	2
CLARO	3

ETB	4
EMCALI	5
DIRECTV	6
MOVISTAR	7
Otro	8