

A Work Project, presented as part of the requirements for the Award of a Master's
Degree in Management from the NOVA – School of Business and Economics

**Repositioning of the brand TV Cine & Séries Online: Strategic Analysis of the own
means of social networks and online platform**

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I. Abstract

This Work Project, conducted within a direct research internship at NOS, aims to propose a reposition of the brand TVCine & Séries online, focusing on a strategic analysis of the own means of social networks and online platforms. Through secondary data provided by NOS and collected online, in-depth interviews of current and past clients of the service and the author's experience on the matter, recommendations were developed based on blue ocean strategy.

On analyzing the most relevant attributes in the Pay TV industry's strategy canvas, a new value curve is reconstructed for TVC&S. Over the elimination of static website, reduction of offline marketing expenditures to raise SEO design and social content tools usage, a new video on demand service must be created alongside with customer interactivity in the new user friendly website, which provides a flexible subscription fee scheme and a recommendation and customized service. These recommendations try to deliver a more focus, unique and clear message for the industry, enhancing TVC&S's value innovation.

II. Key words: Blue Ocean strategy, Digital strategies, Pay tv industry, Consumer Engagement

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“Life is really simple, but we insist on making it complicated.”

Confucious

1. Introduction, challenge and purpose

In September 2018, I started an internship at NOS Lusomundo TV S.A in the marketing and communication department of the brand Canais TVCine & Séries (TVC&S). During the internship I assisted the team with in the online communication, as the work and insights I was collecting were helpful for the development of my study in the strategic analysis of Canais TVC&S's own means of social presence in different network and platforms.

The social media and online platforms analysis are considered a very important topic. However, it is a risky tool to invest and depend on, in all types of businesses. Especially in the Pay TV entertainment market, with 'going digital' term growing every day, having the right online marketing tools can translate into effective online communication, drive engagement and cultivate loyalty among consumers. Giving a study on digital marketing, focusing in social media in the Pay TV movies market in Portugal was never done, I thought it was interesting to do my WP in this company, because Canais TVC&S is the only Portuguese premium Channel offering movies and TV Shows. It does so in 5 different channels, being a part of the portfolio of channels from NOS Lusomundo TV S.A, a company belonging to NOS.

The Pay TV market is composed by 4 main Pay TV providers, NOS, MEO, VODAFONE and NOWO, all linear programming aggregator for the Portuguese consumers. These four players broadcast Canais TVC&S, which means the 5 channels are available in all 4, to all digital clients with set-top boxes, through a subscription fee. However, in the linear model industry context, non linear programming has been increasing through the integration of video on demand platforms like Netflix, the best example, which alongside TVCine & Séries, is available in two of the Portuguese market Pay TV operators portfolio (MEO and Vodafone).

Additionally, a study conducted in 6 countries ¹, by Pay Wizard² found that in the Pay TV market, on average, 84% of consumers would cancel their pay-tv service due to poor customer experience. In addition, the threat of this new non linear platforms represent to the TVC&S

¹ Brazil, Australia, Germany, Singapore, GB and USA were the countries of study and by assumption represent Portuguese, as Portugal has no public market research in the matter

² Pay Wizard is a consulting in service and expertise to Pay TV operators and channels

market space, provided the motivation for the analysis of this topic. The opportunity for the internship and thesis appeared with the company's desire to optimize their online digital strategy on social network and platforms.

Taking into consideration this contextual background, the Work Project main goals are understanding 1) how can TVC&S distinguish itself in this crowded market; 2) how can social media play a trigger role of increasing TVC&S channels' viewership; 3) what are the main online communication drivers that would influence consumers' willingness to pay for Canais TVCine & Séries and 4) what is an effective digital marketing strategy in a brand like Canais TVCine & Séries, Pay TV service.

2. Literature Review

As mentioned in the previous chapter, alternatives to the linear model offered by Pay TV entertainment providers are emerging, creating a very competitive market space in this industry. To analyze this industry profitability, a five porter's analysis was conducted and the main sources of competitive pressure considered for the strategy framework proposed. TVC&S, belonging to this business, has a challenge ahead, as for now, it only delivers a linear service. It offers no digital interactivity, neither is aligned with concept Anytime, Anywhere, Any device (ATAWAD), suggesting it is necessary a new strategy for the reposition of the brand online.

This following chapter gives an overview of the literature concerning a strategy framework that can be followed by TVC&S, as future business development, and then connecting with digital marketing tools. This focus on social media method as well as some insight on customer decision journey because interactions of both tools can generate an effective approach in the Pay TV business.

Blue Ocean Strategy

A brand caught in a context where an industry's boundaries are defined and accepted, while the only way to grab a greater market share of existing demand is to outperform their rivals, it's

within a market space called red ocean. This crowded market space is when the prospects to profit and grow are reduced.

Moreover, a 5-porter's analysis was conducted to validate the designation of TVC&S's industry as red ocean. From this analysis (Appendix 1), both bargaining power of buyers and suppliers is high and identified as the main sources of competitive pressure. The first one because customers control which platform to watch and subscribe, as they face minimal consequences for cancelling either TVC&S or other platforms to watch movies or TV Shows, stating a low cost to switch brands. Also, with increase in the availability of substitutes, the customers became highly sensitive to the prices. The prices they might go for depend on the content quality relation and with rivals in the market, a high customer expectation on value for money. Secondly, the costs of output contracts with majors, which decides the differentiation of the product delivery, are high and barriers specially on online streaming can be imposed. Besides, these majors are now offering their own digital streaming sites, going from suppliers to rivals in the future. (21st Century Fox with Hulu). The full analysis can be observed in the appendix 1, for further insights of the industry profitability performance.

To sustain a high performance, a possible way to go for a brand caught in this industry is to create a Blue Ocean. Through Kim and Mauborgne words, blue oceans are uncontested new market spaces, that turn competition irrelevant and the only way to beat them, is to stop doing it as the rules of this market space are waiting to be set. Still, this is a risky path for managers to follow, with all uncertainties implicit. Also, if the market has accelerating technological advances and dismantled trade barriers there is an urgency for a blue ocean strategy. The strategic move for a brand to follow and deliver, opens and captures a new market space, driving profitable growth and get away from the red ocean environment. TVC&S's asks for the value innovation as strategic move. In other words, TVC&S must align innovation with utility, price and cost positions, to drive costs down while simultaneously drive value up for customers. I.e

while increase buyer's value introducing differentiation factors, drive costs down with the price and costs strategy. Blue ocean came to defy Porter's strategy, that only one of three strategies should be followed (price, differentiation and focus). To make a systematic and actionable strategy, a strategy canvas must be developed, building a diagnostic of the current market space. Then, the strategy canvas must be followed by the four-action framework grid, developed in chapter 4. Digital marketing tools, presented in the following sections, will be used to craft a new value curve for TVC&S. This way, digital marketing enhances the value innovation, delivering a more focus, unique and clear message strategy for the Pay TV entertainment.

Digital Marketing

The concept of Digital Marketing (DM) can be seen as an elaboration based on the traditional marketing, a way of attracting new customers using social media, blogs, forums, email marketing, mobile applications, website optimization and online display. DM is a form of direct marketing which links consumers with sellers electronically using interactive technologies like emails, websites, online forums and newsgroups, interactive television, mobile communications etc... (Kotler and Armstrong, 2009). It facilitates many-to-many communications due to its high level of connectivity and is usually executed to promote products or services in a timely, relevant, personal and cost-effective manner (Bains et al., 2011) The appearance of digital marketing came to change business marketing tools, through content-curation websites (eg. pinterest), content – sharing websites (eg. Youtube) that also enable individuals to achieve a new level of self-expression (Gupta, Carter & Davin, 2015).

Social Media

Additionally, what can be considered as a sub-branch of digital marketing, Social Media came to change businesses current marketing tools, present as a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0³. That allows the creation and exchanges of user-generated content (UGC) (Kaplan & Haenlein, 2010, p.61).

3. "Web 2.0 is a term that was first used in 2004 to describe a new way in which software developers and end-users started to 60 A.M. Kaplan, M. Haenlein Author's personal copy utilize the World Wide Web; that is, as a platform whereby content and applications are no longer created and published by individuals, but instead are continuously modified by all users in a participatory and collaborative fashion." (Kaplan & Haenlei,2010 p 61)

UGC is the sum of all ways in which people make use of Social Media, as various forms of media content that are publicly available and created by end-users.

Social Media includes a diverse range of online word-of-mouth (WOM) forums such as social network sites (SNS) like Facebook or Instagram, creativity works sharing sites (like YouTube), blogs, chat rooms, company-sponsored websites/blogs, internet discussing forums, among others (Mangold & Faulds, 2009, p.358).

Through Kozinets' words, as an emerging communication setup, Social Media has transformed consumers from being passive participants in marketing to being active creators and influencers (cited at Hutter, 2013), thereby cooperating and supporting business through co-creation (Sashi 2012; Haijli, 2014). By promoting active engagements, Social Media is shifting the power over brands directly to consumers, creating challenges for brand managers to manage their brand (Hutter, 2013) by stimulating the use of this strategy as an effective way to interact with customers. Brands now more than ever should consider the UGC as an integrator on social media strategy. The higher the social presence, the larger is the social influence that the communication patterns have on each other's behavior ((Kaplan & Haenlein, 2010).

In addition, social network sites give a virtual space for people to communicate and companies to use it in support of brand communities' creation or for marketing research (Vinerean, Cetine, Dumitrescu & Tichindelean, 2013; Kaplan & Haenlein, 2010). Through the creation of personal information profiles, users can influence others by inviting their friends and colleagues to have access to their profiles, and sending instant messages between each other (Kaplan & Haenlein, 2010). Comparing to other online marketing communication tools, social network sites are less invasive as consumers can choose until what extent they will expose themselves to marketing content (Hutter, 2013). But as benefits never come without risks, these platforms can have harmful effects on the evaluation of brands, on the purchaser decision making process and WOM effect by diminishing it, because inevitably consumers like to be sincere and open when

it comes to have an online opinion, whereas is positive or negative to the brand (Hofacker cited at. Dekay, 2012). Advising other consumers about a certain product by giving them their brand experience is a vital aspect when it comes to their online behavior (Dekay, 2012).

In the literature reviewed, Facebook (FB) is considered a key part of the marketing mix for most consumer brands (Vranica & Raice, 2012), as it offers a space for brands and consumers to interact, consumers become active and contribute with content in a brand's "wall". This makes them feel more involved in the site, key to brand loyalty, lower defection to competing sites and more willing to pay premium services (Oestreicher -Singer and Zalmanson, 2009), like the case of Canais TVCine e Séries, considered a premium service in Portugal. However, a study conducted by Australia's Ehrenberg Bass Institute of Marketing Science found that only 0,45% of consumers who joined FB networks subsequently "engaged" with that network, suggesting that "likes" may not influence subsequent behavior (cited at. Gupta, John, Norton HBR, 2017)

In Entertainment tv network, cultivating loyalty and driving engagement is a more difficult task, with the rise of new streaming video-on demand players coming to threaten premium cable channels. The use of SM is a way of cultivating loyalty and drive engagement, by differentiating themselves from those streaming players, through the explosion in communication and social media sharing, to engage with audiences in unprecedented and beneficial way (Casey, 2016). After a study conducted in 2015 by Nielsen Social, department of Nielsen, it was found that 60% of consumer used their smartphones or tablets while watching TV at least once a week. I.e., consumers use their devices to be social about the programming they watch. So, "Social TV" was named and created. But monetizing it properly, requires understanding the two ways in which social tv can affect viewership, loyalty and engagement positively. Firstly understand, on a cross-platform basis, the effectiveness of owned social content in terms of generating

engagement and secondly question if that organic engagement was generated by their TV audiences (Casey, 2016).

Customer Engagement

In Digital Marketing, only 45 % of customers trust in brands ads, while 70% trust in brand websites and 90% trust in recommendations from other customers (Gupta, 2015). So, to make good use of this, brands need to ensure social media is present in their marketing tools, alongside with user generator content strategy. But then again, the rise of DM is only favorable for brands if they can achieve an imperative point, high customer engagement. The process of building it forms a cycle, also known as Customer Decision Journey (CDJ) (Sashi, 2012).

It is important to state that the CDJ through the years have changed, towards the use of a digital strategy efficient to reach the consumer. The new and more recent concept of CDJ (Edelman & Singer, 2015) compresses the **consideration step** – customers consider an initial set of brands - and shortens or entirely eliminates the evaluate step in the **post purchase phase** – customers selection and buying action are together. This delivers customers directly into the **loyalty loop** - after the experience, customer becomes advocate and creates the bond to repurchase the service/product without shopping other brands. This is how technology shape and influence the CDJ. As Pay TV entertainment is a volatile market, where people can change their preferences very fast given the big supply of content, CDJ can help tv Channels react to customers and predicts their next moves and position themselves in the customer's paths (Edelman and Singer, 2015).

Accordingly, for a company to gain competitive advantage⁴ using CDJ, it needs to have a superior journey that features four interconnected capabilities - automation, proactive personalization, context-based interaction and ongoing innovation - as each of these is more likely to draw in and permanently capture customers (Edelman and Singer, 2015). This means, **automation** contains the digitalization and restructuring of steps in the journey that were

4. **Competitive advantage** is having a higher profitability than the rivals. This profitability can be invested in market share, technology, customer loyalty and executive perks (Grant & Jordan, 2015)

formerly done manually; **proactive personalization** includes taking information gathered either from past interactions with a customer or from existing sources used to customize the consumer's experience; **contextual interaction** is gaining knowledge about where a customer is in a journey virtually to draw him forward into the next interactions he must pursue. Finally, **innovation** arises through on-going experimentation and active analysis of customer needs, technologies, and services. Through data analytics opportunities are uncovered and new sources of value for both the company and consumers are found.

On the one hand, CDJ focus on understanding the stage their customers are in by giving superior value than competitors to build trust and commitment in long-term relationships. Social Media plays the role of serving the process of establishing this enduring relationship (Sashi, 2012) On the other hand, a way of contributing to CE by creating content is through Inbound Marketing (Gupta, Carter & Davin, 2015). Likewise, SM is a way of attracting customers in this process and at the same time contribute to the brand awareness and reputation. As Scott Cook said, “a brand is no longer what we tell the consumer it is- it is what consumers tell each other it is”, meaning WOM is a key influencer in the attract stage of a brand (Gupta, Carter & Davin, 2015). Moreover, as McKinsey&Company study defined, CDJ helps a brand to prioritize their investment in the digital marketing budget depending on the step they are in. That is, a constant realignment of investment must be made, to avoid waste money and out of touch risks.

Nova SBE professor, Antonio Marinho Torres states “Social Media is an essential marketing tool for companies but should not be the starting point of a DM strategy”. That is, instead of focusing on how to distribute spending across media, marketers should first target stages in CDJ, to then think about how to allocate investments relative to SM, as a way of diminishing the discrepancy between most marketing allocations and the touch points at which consumers are best influenced (Edelman, 2010).

The literature reviewed suggest several topics to understand the customer engagement concept and examine the best way of the social media use in digital marketing strategies, trying to make a relation with those and the entertainment Pay TV industry. In this sense, it was important to study factors like user generator content, social network sites, consumer decision journey steps and capabilities to generate competitive advantage. Thus, this WP aims to use the information found in the literature to help answer the research questions defined in the chapter 1.

3. Methodology and Analysis

To get a deeper picture of the topic “Repositioning of the brand TV Cine & Séries online: Strategic Analysis of its own means of social networks and online platform”, different methodologies were performed. In a deductive approach, to get a wider amount of data to test the developed theoretical and conceptual research problem (Saunders, 2016), collected an exploratory research was designed, through qualitative research and analysis. The aim of the research design chosen is discover ideas and insights to the problem stated (Saunders, 2016).

Firstly, using the mono research method, an exploratory, qualitative data collection stage was conducted. First, through semi-structured interviews and second, through secondary data provided by NOS Lusomundo TV and collected online. The first one came from a cross-sectional data survey, through google docs, to identify the targets to be interviewed. This led to in-depth interviews on the way to gain a qualitative understanding of the underlying reasons and motivations (Saunders, 2016) of the subscription process and use of Canais TVCine e Séries. This process will drive conclusions and recommendations, as well as test hypothesis. These hypothesis are: **H1** – *There is a positive relation between social influence and consumer engagement*; **H2** – *There is a positive relation between entertainment available everywhere and consumer engagement*; **H3** – *There is a positive relation between search of information and customer engagement*; and finally, **H4** – *TVC&S’s clients frequently receive information about all the content though online or offline communication.*

Main insights on the Pay TV market space and players - Secondary Data

To strengthen the qualitative research and discussion, secondary data was collected both from external sources and internal sources, to provide an effective analysis and discussion. First, internal data that came from NOS during the internship, gave relevant insights into learning about the Pay TV entertainment market space, as well as for current TVC&S marketing expenditures and business. The external data collected on the internet and NOVA 's Teresa e Alexandre Soares dos Santos Library complemented the already given by NOS.

In Portugal, Pay TV channels and market research is very limited in terms of reports, as only an Anacom report gave relevant insights on this topic, so data about worldwide markets like the US and UK (largest economy of the world and largest digital economy in Europe), from Deloitte insights and Nielsen, complemented this process. Considered in the discussion, the assumption that those behaviors were broadly the same as with the Portuguese market space, clearly discussable argument.

TVCine & Séries is the third stage were consumers in Portugal can watch movies that were in the cinema just 6 to 8 months ago (Appendix 5). This is a competitive advantage as other Channels in this entertainment segment, that can bring the same content much later on. Thus, TVC&S is the only premium service channel in Portugal with contracts of movie distribution with all 9 big majors of movies and tv⁵, giving it a privileged position on content availability. Moreover, through own, paid and earned media, TVC&S communicates online with their consumers, using the website and social platforms (Appendix 2) as spaces of content information and campaigns of press releases distribution, for brand awareness and perception. A monthly newsletter is sent as email marketing tool, but only for NOS clients. For NOS, TVC&S is a product for client's management, which means is a plus to the Pay TV package service, using it to keep clients in their data base. NOWO just started to do the same, by adapting the newsletter and sending it to they subscribers.

5. 9 big majors of cinema and Tv of the world: Disney, Warner Brother and Pictures, CBS, Universal, Sony Pictures, 20th Century Fox, MGM, Paramount and HBO

Adding to knowledge gathered during internship, online reports collected and referred, the main insights were taken into account for the strategy and framework developed in the next section.

Netflix is a big driver of consumer behavior change when subscribing premium channels, as customers preferences for uninterrupted video on demand is growing fast.

The number of Portuguese premium Channels subscribers in 2012 was 25%, but in 2017, was only 15,6%⁶ (Appendix 6, graph 5), and the forecast for this number will decrease in the following years. Also, Netflix is the over-the-top⁷ service most used by consumers. From 6,1% (Apx. 6, graph 3) of Portuguese individuals with video on demand subscriptions⁸, (SVOD) 4,8% are Netflix subscriptions (an almost 79% “share”), providing a multi-platform service with both movies and TV Shows alongside with original content. Adding to it, in terms of awareness, Netflix is the second SVOD platform more prominent in the market (appx 6, graph.4). Showing that Portuguese consumer is increasing its video on demand subscriptions. Each individual, on average, already subscribes 3 of those platforms (Deloitte-insights), suggesting a validation of **H2**. The forecast is this number will grow, forcing Pay TV companies to follow the direct to customer path through their own digital streaming devices, making the industry rethink their business models or the value gap will cause a bigger decline in Pay TV penetration. In the first quarter of 2018, Pay TV penetration decreased to 84,3%⁹, comparing to year before of 92,9% (Anacom, 2018). Consumers fuel this trend by increasingly wish to see whenever and whatever they want. I.e either premium Channels follow the ambitious standards for content type and delivery or the recession in premium channels subscriptions will continue to increase. Following previous insights, an internal benchmark, made during the internship and provided by NOS, compares other Pay TV providers from 9 European countries (Appendix 7), concluding TVC&S is the only premium channel belonging to a Pay TV provider without a video on demand service, not appearing to understand that linear model is outdated, and innovation and synergies between linear and non-linear model are needed.

6. Pay TV Subscribers in 4T2017 – 3,79 millions of consumers considered for Anacom study

7. OTT stands for over-the-top service, delivers TV content via the internet, without needing users to subscribe to a traditional cable or satellite

8. SVOD -Streaming video on demand

9: Anacom Televisão por Subscrição report, published 2 november 2018

Furthermore, TVC&S segmented target is mostly Gen X (individuals with ages between 35 and 51), the decision markets when it comes to choose to Pay TV providers choice, to whom TVC&S communicate. This generation has actively contributed to the digital trends referred earlier and so, listening to them is a plus to improve business model and generate growth. Among the Gen X, SVOD activity increased from around 30% in 2016 to more than 50% in 2017 (Deloitte Insights, 2018). Also, this generation is following the same path as Millennials and Gen Z, as cutting-edge adopters of digital media, which makes harder to keep them on the linear model (Deloitte Insights, 2018). Moreover, the number of Portuguese having a smartphone has duplicated, from 2012 to 2017, as in 2017 this stat reached 73,9% (Marktest,BT, 2017), supporting the need for a synergy between tv and mobile services. Likewise, it is important to highlight, that from Portuguese's mobile services activities, 76% (Appx.6, graph.6) use the internet available on mobile to navigate in social media and search for information about products and services, suggesting digital marketing strategies can influence Portuguese consumers purchase and decision behaviors, big percentage of their online activity is on their online network. Following Whiting & Williams study (2013), consumers use social media to conveniently obtain information about products, to read reviews on businesses, access experiences and knowledge from other users, to make well informed buying decisions, supports earlier insight on confirming **H1**. Yet, on social media different content post types through social platforms generates different share of engagements, as Nielsen's Social Content Ratings publication justifies it (Appendix 8). On share of engagement by platform, Instagram surpasses the FB with 70% of the indicator. Also, image and video are the gatherers of the bulk of social engagement, presenting 48% and 35% share of engagement, respectively. However, consumer engagement with the same content type differs on the social platform used in. On FB, video content generates bigger engagement while in Instagram, image post beats the video post ones.

To conclude, with the secondary data collected and analyzed, it was time to talk with current subscribers and connect the insights gathered of both researches.

Primary Data - Semi – structured depth interviews – TVC&S’s subscribers perception

Semi structured depth interviews are the direct qualitative research procedure chosen in the WP. As this WP involves an exploratory part, to uncover motivations, beliefs, attitudes and feelings of the topic (Malhotra,2010), understructure on a one-to-one basis interviews were developed and analyzed.

According to Saunders (2016), a research interview is a purposeful conversation between two or more people, requiring the interviewer to establish rapport and ask concise and unambiguous questions, to which the interviewee is willing to respond, and to listen attentively.

The interviewees were generated through a single cross sectional online survey with 103 respondents. From those, only 31,7% currently subscribe TVC&S and 10,7% are past subscribers, in a total of 44 respondents with TVC&S experience. Of these 44 respondents, 19 accepted to respond further to an interview, questioned about a list of topics related to the online communication, own media platforms and social network of Canais TVCine & Séries. In terms of sociodemographic information, 6 of the respondents were in between 20-24, 4 in between 25-35 and 9 had >45 years hold. In terms of educational level, 10 of the respondents have bachelor’s degree and the other 9 master’s degree.

The questions asked depended on the type of target the interviewees were. Two different targets defined as the following: Target 1 – Current subscriber and Target 2 – Past subscriber, as it shows in the interview guide (Appendix 3). With this division, insights on what to improve in the digital marketing strategy were wider and miscellaneous because the main goal was not statistical validity, but qualitative opinions on the main digital marketing topics to improve.

The interviews generated insights that were important for the development of the next section. The respondents agreed TVC&S offers Channels with most recent and superior quality content, in a linear model market, as through 5 different channels, more than 70 movie premiers per month occur. Even though they are TVC&S subscribers, almost all the respondents have Netflix as a SVOD service, allocating more of their time to watch this one instead of TVC&S. The motivations behind this activity, come with the fact Netflix offers them what TVC&S doesn't 1) recommendations on what to watch based on a customized service; 2) original content; 3) facility for the Any Time, Any Where, Any Device¹⁰ concept, i.e. freedom from the schedule and 4) a customer experience enhanced by the push notifications – suggesting a brand engagement lower for TVC&S than for Netflix. Respondents, now expect a certain type of service, dictated by Netflix, that demand to have when watching movies or TV Shows. Moreover, some respondents addressed Pay TV providers are a variable on the use of the service. There are some Pay TV providers, that through more advanced technology in terms of user interface (UI) on their set-top box, provide users with a better experience in terms search for content among all Channels available. Some respondents complaint about how exhausting it was to find movies in the UI of the set-top box of their Pay TV provider that they forgot about TVC&S and would go directly to Netflix, where they were immediately impacted by suggestions of content to watch once they logged in.

Also, when asked about the communication frequency and type, only one of the respondents referred to use the newsletter sent by NOS, while the majority don't receive any kind of online or offline communication. This confirms the idea that the website awareness is very low among the respondents, rejecting **H4**. However, when showed the website and asked to evaluate it, in a scale from 0 to 10, on the mobile friendly attribute, it scored 3, showing a low performance. Also, most respondents answer if they were more aware of the website usage as well as added a customized option, they would use it more frequently, confirming **H3**. But agreed by all the

¹⁰. **ATAWAD** stands for Anytime, Anywhere, Any device, represents perfectly how technology and the way we work are evolving. Besides the work we deliver, the continuous connection with devices is becoming equally important. (Wisembly, 2017)

respondents, the website must improve because most functionalities are delivered in the set-top box and is not mobile friendly, which preempts its use.

Even though quality and variety of movies were the decisions factors to subscribe them in the first place, now respondents feel the variety of titles diminished, adding to fact the schedule limits their viewership. Yet, Social media is the place where they spend more time, although never crossed on their feed the TVC&S Social media platforms. However, they agreed these social platforms would have impact on their usage and viewership of the channels. If some content types were suggested, these platforms could impact their viewership of the channels. This suggest, among the subscribers questioned, social media and digital platforms can have impact on consumer engagement with TVC&S. Also, most of the respondents belongs to Gen Xs, supporting the trends identified by the online reports, are validated by the interviews. A fundamental change in the business model of TVC&S must be done, through digital marketing tools.

Finally, target 2 respondents highlighted the fact subscription fee is too high for the use of all 5 channels, suggesting a price scheme would make them subscribe TVC&S again.

The interviews lasted between 15 to 20 minutes, depending on the target and on the amount of information provided. For this WP, all interviews transcribed were synthetized as way to avoid errors and summarized (Appendix 4).

4. Discussion of the gathered research and further recommendations

This section of the WP offers a framework for TVC&S reposition their digital and online strategy, the strategy canvas referred to in the literature review.

Then, a four actions framework would be applied for the recommendations proposed, aiming to reconstruct the buyer value to the new value curve of TVC&S. These recommendations divided in a Eliminate-reduce-raise-create grid (ERRC) are a recommendations on how to act regarding the strategy canvas developed. This framework is easily understandable by all

managers of TVC&S, to pushed them on to pursue both differentiation and low cost and break the value-cost trade off (Kim and Mauborgne, 2009) .

TVCine & Séries Strategy Canvas

For the development of a strategy canvas, three groups of players were considered: **i)** Netflix, as the most obvious. Analyzed before, this video streaming platforms has been setting the trends. It threatens the linear model and is a stronger competitor in the new competitive environment; **ii)** other cable channels of movies and TV Shows (Fox, AXN or canal Hollywood) considered in the study as the original content they are offering is increasing and because they have not a subscription fee; and finally **iii)** TVCine & Séries, as the subject of this study.

After identifying key players from all the research conducted and from the literature review, the most relevant attributes the industry plays on, were defined:

1) Price: When it comes to price, TVC&S value is in between the prices offered on the market space. All 5 channels (4 channels of movies organized by genders and TVSéries) are available to the client by one subscription fee of 10€ per month. Netflix practices a higher nominal price, considering their best subscription scheme, but very near the TVC&S one, of 11,99€ per month. For this a client can have 5 different accounts, seeing all content in different devices, at the same time, if feasible.

2) Distribution: Like it was mentioned before, TVC&S is a service available in the 4 main Pay TV providers in Portugal. However, in the canvas, this attribute performance is a lit bit below the other competitors because in Portugal the number of premium channels clients is decreasing, indicating there are still 84,4% of premium channels non-consumers to reach. Reaching these non-customers can be an opportunity to the business.

3) Digital Marketing Expenditures: Digital focus is still a very primary concept for the brand, according to Sunil Gupta, digital technology has changed how consumers search for information, interact with each other, buy products and services. The tendency is that

investment on paid and own media (SM only) is on average between 3k and 5k, depending on the campaigns implemented in the specific year. This investment stands for, on average a 7,4% of the total budget for marketing and communication. Also, the online investment made on campaigns forecasts to increase in the future, although on average stands for 15% from all campaign's budget. Offline marketing is what has the higher investment allocation.

However, this investment is not being allocated in the most strategic points. From the qualitative research, a low online awareness was identified, as the most respondents didn't knew the website or had visited any social platform where the brand is. Also, the online communication sent by the brand differs from each Pay TV providers, because TVC&S is not the direct communicator with the end consumer, the Pay TV provider holds that control. Moreover, from a search made on google, it is a struggle to find the website of TVC&S when you look for movies and TV Shows in Portugal (Appendix 9), making this awareness difficult to achieved and a factor to be raised.

4) Any Time, Any Where, Any Device (ATAWAD) Concept: Anywhere, anytime concept is one of the stronger factor in this market. Be available everywhere, is an aspect TVC&S doesn't have. Being the only bundle of premium Channels for movies and TV Shows in Portugal, it should would benefit from the newest factor to comply with the concept. For this attribute, is important not forget that linear model is the red ocean.

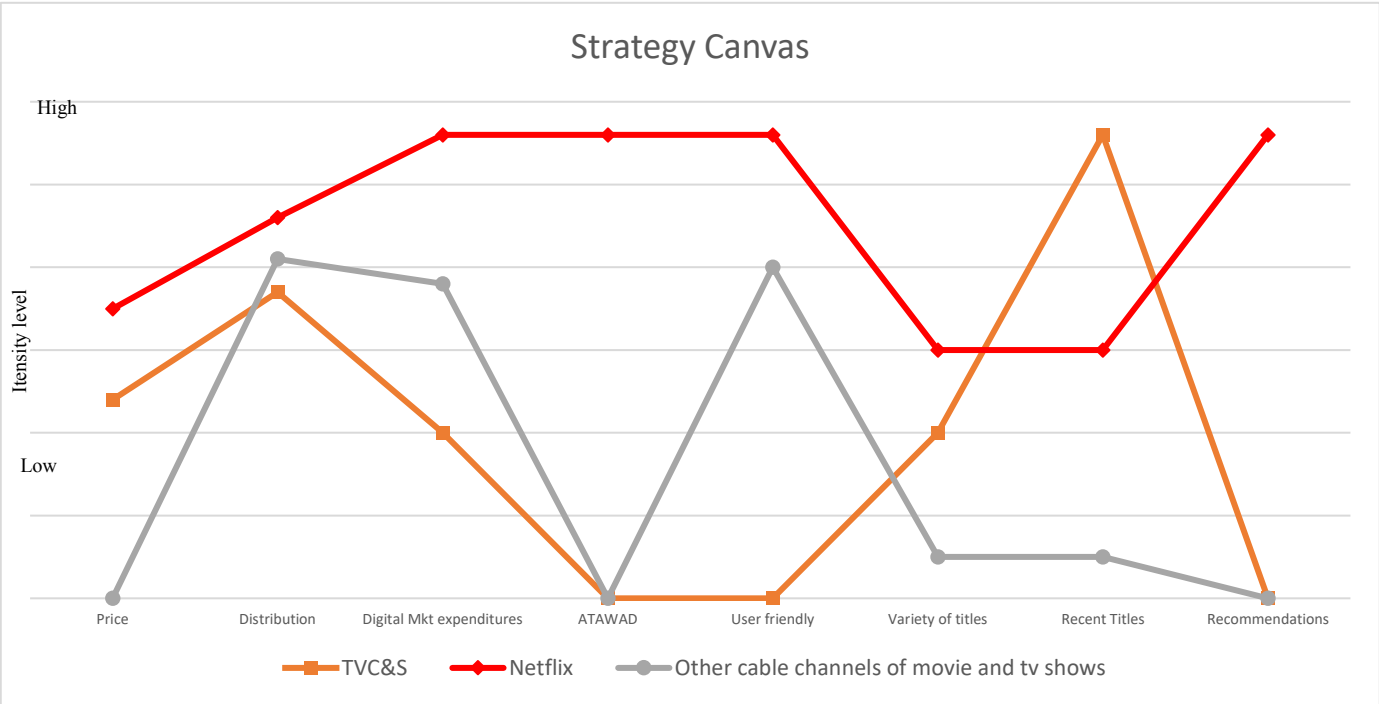
5) User Friendly: Google, on keyword ratings, selects who is responsive to mobile (Moz Blog, 2018). From the qualitative research and an Alexa benchmark on a distribution of 1000 top scores sites, www.tvcine.pt ranked 0,55 on translation scale of extremely poorly page performance and mobile friendly (MobiReady Beta, 2018), meaning TVC&S is not considered user friendly. So, with mobile phones, the devices most used by Portuguese to search for information and buy products or services, responsiveness is an important characteristic.

6 and 7) Recent and variety of titles: This factor gives competitive advantage of TVC&S in the market space. Already mentioned and recognized by respondents, the service delivers the most recent contents as is the only premium service channel in Portugal with output deals with all 9 big majors studios for movies and TV shows giving it a privileged position on content availability. However, in terms of variety, client’s value is lower, concluding a better schedule program and contracts of movies should take place, to improve and attract customer to the loyalty loop of the brand.

8) Recommendations: This attribute refers the customized service that TVC&S doesn’t offer, but is felt a need to the buyers’ value, as an augment for their customer decision journey.

Considering all the relevant attributes and their intensity, the below graphic makes an overview of the intensity’ value curves, in the TVC&S’s market space.

Graph 1: TVCines & Séries Strategy Canvas



To conclude, through this discussion and insights, TVC&S has to redraw its strategic profile and with the framework, presented in the next section, a reconstruction of buyer’s value is possible.

TVCine & Séries Eliminate – Reduce – Raise – Create Grid

This framework should help TVC&S question which attributes analyzed in the strategic canvas must be eliminated, reduced, raised or created, to design a new value curve, based upon recommendations.

These recommendations are a gathering of literature review and qualitative analysis made during the WP, applying the concept of a blue ocean strategy to the digital focus on the Pay TV entertainment market.

| **Table 1:** Recommended TVCine & Séries ERRC Grid

<p>Eliminate Static Website One subscription fee scheme</p>	<p>Raise Online Awareness - SEO design strategy and Social Media content type Variety of titles</p>
<p>Reduce Offline Marketing Expenditures</p>	<p>Create ATAWAD - OTT service and customized recommendations User friendly website Subscription flexibility Consumer Interactivity</p>

First recommendation, is to **eliminate** the **static website TVC&S** currently has and invests in. From the analysis and discussion, a website that is not responsive, does not add to the value proposition and the value curve of the brand. The current website presents an average site visit of 43sec, pages view per visit ≈ 2 and an avg. bounce rate of 38,14%¹¹, indicators that suggest it is not contributing to the brand value. Eliminating this site, a new website should comply better with the consideration stage in CDJ of the brand and at the same time an improvement in the communication with current and new clients.

Also, from insights of the research, a single subscription fee makes it hardly competitive and not attractive to non customers. Eliminating it would give a higher value to the clients. Then, when thinking about **reduce** factors, **the offline marketing expenditures** were in the agenda. I.e, reduce what is invested offline but reallocated to online digital marketing tools like SEO

11. Appendix 10 – TVCine & Séries bounce rate historic data, source: google analytics

design. Overall, the consideration of the Eliminate and reduce attributes contribute to a broad cost reduction for the brand that can be reinvested in the following attributes, that TVC&S should **create**:

1) To comply Any Time, Any Where, Any Device concept creation and meet capabilities for the use of CDJ as competitive advantage, TVC&S must **create an OTT service** with the name TVCine & Séries GO PLUS. This new video streaming on demand service would assembly on the automatization and ongoing innovation capabilities. Through a soft launch format, not all the movies airing in the channels would be available in the OTT service – per month, a selection of the past most watch and movie premiers is available on demand. Next, sustaining long term competitive advantage, the TV Shows would enter as a complement of the service.

Foremost, only recommended by a TVC&S's subscriber, a person can subscribe OTT service including the Channels too (mandatory). This way, TVC&S creates a premium community through the service, and a feeling of desire on other future SVOD customers, as to have the service someone that you know allows you to enter the community.

Alongside this new platform, a creation of a customized service would comply with the proactive personalization capability. From a personal profile, per subscription, the client could choose movie genders, actors or directors, generating a **recommendation model** in the customer experience. Also, in a long-term stage, this data generator would contribute to a better recommendation service. Finally, if former 3 capabilities were met, a sophisticated version of technology supports context-based interaction. This would enable a succession of interaction with customers, like push notifications, informing them on what to see in the platform.

Put into action this service, would allow TVC&S to deliver full experience to their premium customers, without depending on the Pay TV provider, as well as capture non premium channel subscribers, a big % are still to be reach. Also, through digital implementation, tracking customers preferences and activity is easier and an advantage to the content delivery.

2) A **user friendly website** must be created, for the ATAWAD concept to work, because it will not only be in PC devices the clients would want to see the available content or search for the subscriptions conditions, but also on their mobile or tablets. This user-friendly site aims to change current and future clients' viewership of the channels, turning them into advocates and brand lovers, as interesting content, across the formats (already tested in platforms) is what is necessary to hook the audience's attention and fulfilling their needs. Offer them a space on the website with cinema fun facts and information, through an in-house cinema lover or other experts in the area, where critics and reviews of premiers are addressed, creates a personal brand relation with the clients.

3) To increase traffic and authority to the website, the **new subscription scheme** would be available only through the website. Namely, only online, a new client could subscribe the TV cable channels, choosing one of the three subscriptions fees. These schemes had always TVC1 and TVSéries in the package, as it's where all relevant content is distributed. The packages would be: 1) all 5 channels available; 2) TVCine 1 and TVSéries, plus two channels of client's choice (between TVC2, TVC3 or TVC4); and finally, 3) TVCine 1 and TVSéries, plus one channel of client's choice. The prices of each fee would have to be further investigated with the Pay TV providers. This would contribute to the increase of titles variety, further on developed in the raise action, and a **flexibility of subscription** to the customers.

4) The creation of a **customer interactivity** would be possible through both new website and social media. In the website, a suggestion area can contribute to actively enter and shape conversations, while the customers have a space to share their ideas and perceptions, TVC&S reviews the content and can put in action their ideas. Also, social media would be the space to enhance this interactivity, communicate and impact website's traffic. An augment to social influence is belonging to a premium community (Gironda & Korgaonka, 2014). So, using social media as tool for the premium belonging, can also impact customer interactivity with the brand.

Then, the website will contribute to this attribute if it complies with the referred strategy in Lit. review, inbound marketing strategy. Through an investment on both Google AdWords and WOM (over social media), TVC&S draws in new and current subscribers to increase site traffic. The common KPI in these practices is the **keyword ratings**, as it gives the ability to **raise SEO design** strategies around these keywords that require the most attention and provide the most benefit. This ensures organic links of TVC&S rank higher than competing links. To do so, there are two questions TVC&S' brand marketers must do: "How do customers find my website?" and "what content I should create to attract potential customers?". To answer to it, TVC&S must base their Google's ranking on two factors – **relevance and authority**. Relevance is achieved through how responsive the website is, following the implementation of meta tags to improve their importance to Google. Next, to enhance organic search engine, TVC&S needs to gather links from other websites, building authority relevant enough for Google to notice their website. With this strategy, TVC&S will diminish influence of advertising and rise the consumer search.

Adding to this, aligned with the digital marketing expenditures, **content type** published, to attract customers in social media, must be **raised** because it would not only contribute to authority building as well as to content creation requirement. Also, the raise of content type strategy will contribute for the customer interactivity attribute creation.

Already tested during the internship, new content through video, image post related with the cinema world and interactive stories performed on TVC&S's Instagram account, showing better results than before. The growth rate of followers increased by 12,8% in September and October 2018, comparing to last year (in the same period) growth rate of 3,6%. Moreover, the engagement rate (ER) increased to 2%¹², fitting between the standards of a good ER, while before never reach 1%. Here, TVC&S with its usage of social media, is contributing to WOM

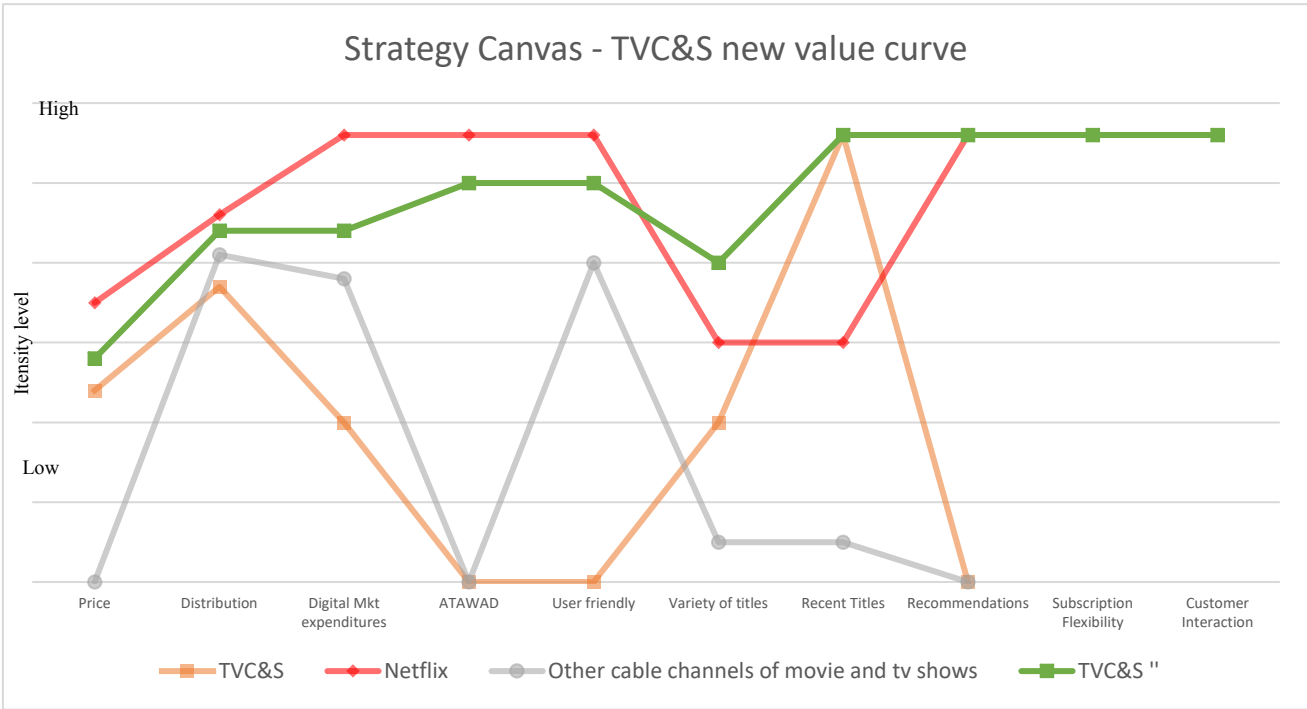
12. Engagement Rate (ER): Average Engagement/# Followers (i.e average engagement = interactions/#posts). According to Scrunch, marketer blog ER<1% is considered a low ER, between 1% and 3,5% is an average/good ER and between 3,5% and 6% is high engagement rate.

generator and, investing on shaping clients into advocates, as they are the best influencers to talk about the brand, then the brand itself.

Finally, variety of content must be **raised**. The creation of the OTT service could increase this attribute intensity level, as people would have a more redistributed content, customized and distributed by cable TV Channels or SVOD online. On the OTT, past titles could be available, contributing to the improvement of the attribute. Like mentioned before, new contracts with the big majors studios would be needed, yet the opportunity to deliver more content would be available, as another window of distribution is available.

This grid provides a focus on the most relevant key factors of competition, related with the digital marketing strategies effective to improve loyalty loop and consideration stage, adding with recommendations that diverge from the other players, keeping TVC&S’s strategic tagline “*Everything Premiers Here*”. So, a new value curve for TVC&S arise as we can see in the Graph 2, in the green line (TVC&S’’).

Graph 2: TVCine & Séries New Value Curve



5. Limitations and further analysis

Concerning this WP, some limitations are present.

Firstly, the number of interviewees can represent a small sample, not representative for the whole population, suggesting an unfavorable statistical validation. Moreover, besides contact efforts, it was not possible to interview a big number of Target 2 sample. They could have generated more heterogenous research, because past subscribers could give bigger insights on what to improve in the service. In future research, these limitations can be minimized, with a bigger sample.

Furthermore, research design used could have biased the researcher leading to certain direction and affecting results and conclusions. Besides research design, the research tools could have biased the researcher to some certain recommendation proposals, suggesting any other tools considered valid could lead to different results and strategies slightly different.

For further research, I would recommend that use of either focus groups or conclusive research because, respectively, the synergies of groups and client involvement can generate innovative ideas, eliminate biased analysis and a collection of bigger amount of data probably lead to a statistical validation. This last one research design, could lead to a re-targeting strategy, as other generational interviewees were considered to the study and identified as an opportunity to the business. Additionally, due to General Data Protection regulation and NOS position, the amount of secondary data about the business and consumers insights provided was limited.

Finally, due to the limited time for the WP development, an additional quantitative research could have led to a conclusive validation of the recommendation proposal, suggesting a further research to this matter. As identified in the WP, the digital environment and thereby the consumers' behavior is always changing, so TVC&S marketing and communication department must take into consideration that and making a further update on this framework is necessary to be successful in the new market and, still deliver the best premium channels in Portugal.

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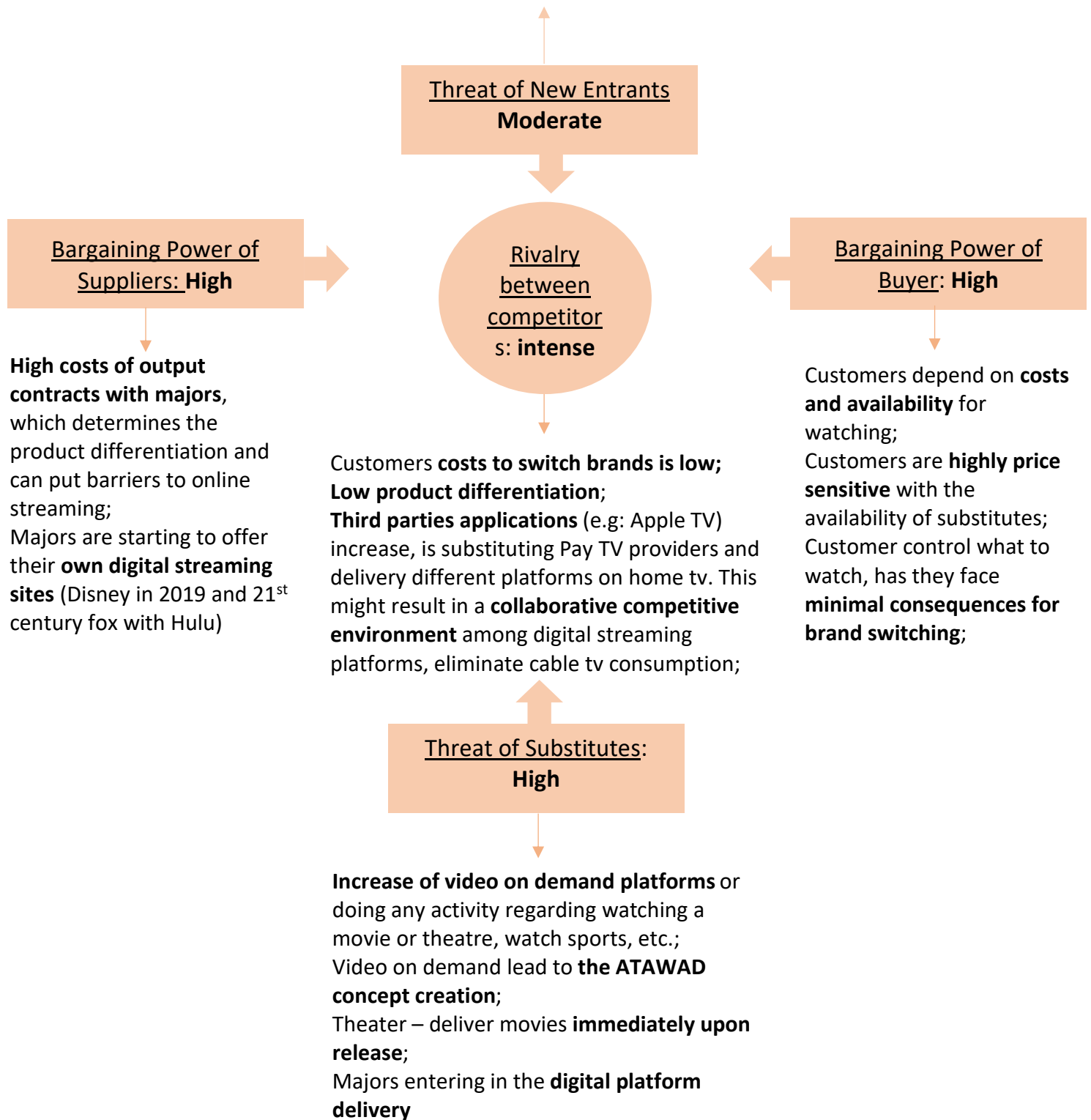
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7. Appendix

Appendix 1: TVCine & Séries industry performance analysis – 5 Porter’s analysis

High costs of technology on linear model;
 The Pay TV providers that are already there, **who created a brand and image toward customers**. The same applies to video on demand platforms;
High costs of contracts with majors, to deliver the most recent titles



Appendix 2: Own Media: Fig 1 – site; Fig 2 – Instagram; Fig 3 - facebook

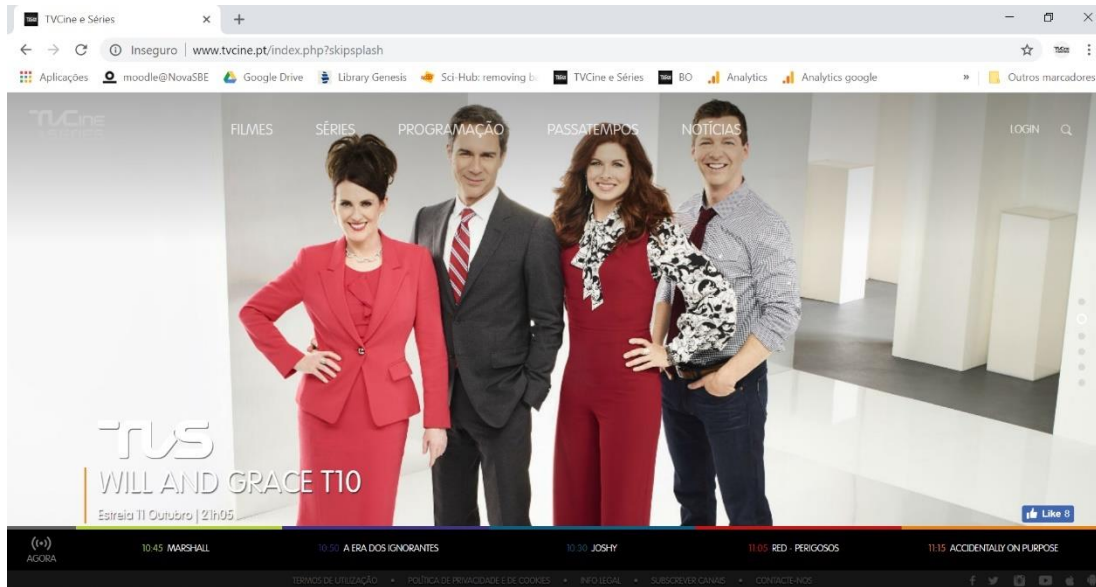


Fig 1 – www.tvcine.pt

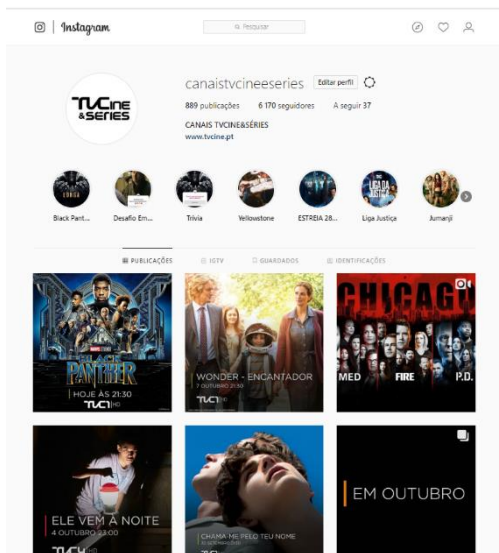


Fig 2 – @canaistvcineeries

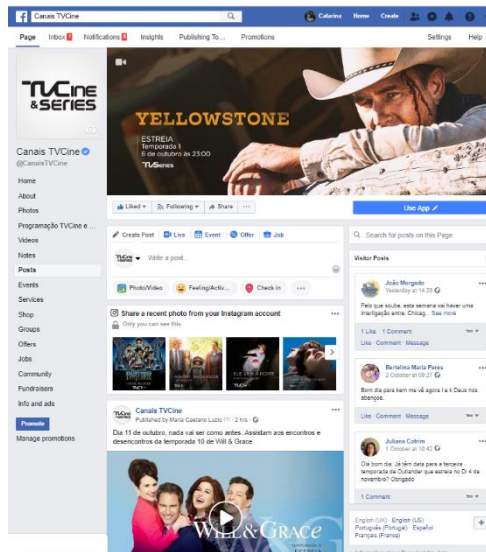


Fig 3 – @CanaisTVCine

Appendix 3: In-depth interview guide – Topics and guide questions (i.e. would depend on the course of the interview)

Appendix 1 - Interview Guide Style

Semi-structured Interview (Saunders, 2015) – qualitative interview with a list of themes and some key questions, flexible from interview on interview. Some topics might be omitted depending on each interviewee and some others may be deepened.

Warm Up

Good morning/afternoon/evening. My name is Catarina Perestrelo and I'm currently a student at the NOVA School of Business and Economics and an intern at NOS Lusomundo TV.

I'm also currently developing my thesis on the analysis of the canais tv cine e séries Digital Marketing Strategy, more specifically their social media and own means of online communication.

For this purpose, I would like to interview you for about 15 to 20 minutes, with questions related with Canais TVCine e Séries. It is important to refer that there are no right or wrong answers. To further analyze the interview, I would like to record this conversation. It will remain anonymous and you will not be contacted after finishing this conversation.

TVCine & Séries's Subscription process -

Topics:

- process
- subscription motivations
- Advertising implementation
- Communication Frequency and Engagement
- View of the content

- 1- Do you subscribe canais TVCine e Séries?
- 2- How did get to know canais TVCine e Séries conditions, before you had subscribe them?
- 3- What was your motivation to subscribe the channels?
- 4- Was the process of subscription simple? (online or in the box) Did it occur online, on your step-top-box or was it already "subscribed" by your pay tv operator when you decide sign up for their service?
- 5- Do you recall watching recently any sort of commercial communication from TVCine & Séries? If yes, do you remember where and when did you see it and what was about?
- 6- How do you feel about the frequency and type of online communication you get from TVCS?
- 7 - How frequent do you watch canais TVC&S?
- 8- Do you consider engaging the online communication you get from TVCS? If so, why?

Own Media

- Responsiveness
- Functionality and content
- Customized option

9- Have you ever visit canais TVCS website?

10- (Said yes in 7)How do you evaluate website's responsiveness in a scale from 0 to 10, were 0 is not responsive at all and 10 perfectly responsive? By responsive we consider the way it adapts to your mobile equipment (smartphones or tablets)? Explain your answer

11-Do you use the website regularly? If so,what do you feel is missing in the website? If not,what would be needed to make you start using it? What do you consider important in a website for a product like TVC&S

12-Would you like to have a more customized experience in the site?

SOCIAL NETWORKS - Digital content and communication use

13-Are you a follower of TVC&S on facebook, Instagram or twitter?

14-(Said yes in 12) In what way do you feel the communication in these pages functional to the use of the channels?

15-(Said yes in 12)Does this communication have any impact in your perception about the channels?

16-(Said no in 12) Now that you know they have a presence on social network would you follow them ? What would you expect to find on their day-to-day communication on SN? What would you make follow them regularly?

17 - Could this communication impact you frequency of visualization?

Brand Loyalty

- Loyalty Level
- Brand comparison
- Customer engagement with tv brands

18-Where else do you watch movies or series ? Other paid channels or streaming platforms?

19-What do they offer that canais TVCINE e Series doesn't offer?

VALUE PROPOSTION - IF CANAIS TVC&S WAS A CAR, WHAT TIPE OF CAR WOULD IT BE?

TARGET 1 - Perguntas para quem disse na pergunta 1 " Sim"

20-As current customer, what do you expect to see in the TVCS channels service that currently does not exist?

21-Would you recommend TVCS to a friend?

22-Have you lately thought about unsubscribing the channels? If yes, why?

TARGET 2 -Perguntas para quem disse na pergunta 1 "Não, mas já subscrevi no passado"

23-Why did you unsubscribe the channels in the past?

24-What do you think is missing on the service that TVC&S provides?

25-What do you think they should or shouldn't communicate?

TARGET 3 -Perguntas para quem disse na pergunta 1 "Não"

26-Why don't you subscribe the channels?

27-Did you get to know the service conditions? If so, where?

28-Would online advertising relative to the channels have any impact on your subscription decision?

29-Is there anything you want to add or comment about Canais TVCine e Séries?

PROFILE

Age -

How long have you been a subscriber of TVC&S –

Gender(don't ask)

Academic background –

Wrap up

That's it! We're done. Thank you very much for you time today – your insights will help in the online repositioning of canais tv cine e series and add value to the online strategy.

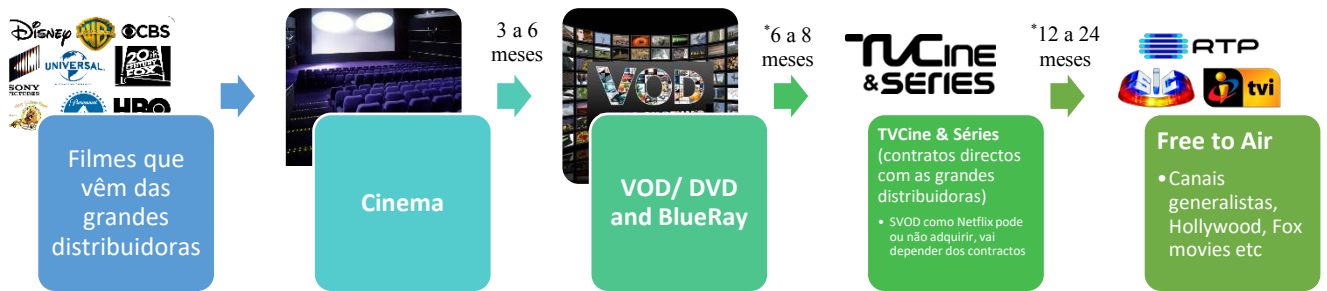
Don't worry, you will not be contacted again.

All the best for you!

Appendix 4: In depth Interview respondent's answers resume

Topics	
TVCine & Séries	
Awareness of TVC&S conditions and subscription process	Most of the targets got influenced by their Pay TV operator, as it was through them they got the info about the brand and subscription conditions. Only a friend's recommendation influenced one respondent. The subscription process was made offline, either by subscription directly on the set-up box or by phone with an operator. All respondents didn't know about the online subscription process, that can occur on the website (sents the clients to their Pay TV operator's website).
Motivations for the TVC&S's subscription	Most of the respondents subscribe TVC&S because of the quality of the content, as well as their recent portfolio. Yet, some respondents subscribe it because it was a package promotion, only after realizing the previous characteristics mentioned.
Advertising of TVC&S	Only 5 of the respondents saw recently any sort of communication. They saw on cinemas, MUPIs and one on a TV Channel. However, the majority of the respondent's doesn't see any sort of publicity of the brand.
Communication (online and offline) of the Brand with consumers	Only one respondent receives and use the newsletter, sent only to NOS clients. Other only gets communication though self-search in the app. So, majority don't communicate with the brand or get any sort offline or online communication.
Website	
Awareness about the Website/App	Almost all respondents didn't had any knowledge about Canais TVC&S app or website. Some of them saw during the interview, as a way to get answer on followed question. (The ones that saw the website, evaluated as 3 (average of all answers) on the responsiveness scale, meaning the site is not friendly to other devices use, beside computer.
Usage of the Website	Most respondents feel that if they got more communication about the website and its functionalities, they would go there and use it. Also, the app is the most interesting for the respondents, as they would like to receive alert and notifications about the schedule of the channels. However, the most common reason that would make them use the website, is if there was a possibility to watch the content online.
Customized option perception	All respondents felt this option would be the trigger to their use of the website, because with the customized option they would reduce their search for the content to watch and as well find about some new movies or TV Shows, that would fit their preferences
Social Media	
FOLLOWERS	Only one of the respondents saw a TVC&S's Social Network, but none of the respondents is a follower
Communication on SM expectations and factors that would affect their viewership of the channels	Besides one respondent, all interviewees didn't follow TVC&S SN. In general, different kind of factors would make them follow these SN and influence their viewership of the channels: 1) Engaging communication about the latest content; 2) Reviews with experts from the cinema environment; 3) Interviews with actors and behind the scenes from the movies airing; 4) current clients opinion about the service
Other VOD subscription services	
Type/brand	84%(16) have Netflix as other paid subscription video streaming service. Also, almost all the ones that have Netflix, give more of their time to this service then to TVC&S. When asked why, references on what Netflix has and they feel is missing in the service was: 1) multi-platform option; 2) Customization option , divided by profiles, giving me as an option what it fits me; 3)original content is what attracts the most; 4) push notifications , advising and informing the movies/TV Shows the platform has for them
Factor to watch more those VOD the TVC&S	
Target 1 – SUBSCRIBE TV CINE & SÉRIES	
Suggestions on the service	More information and communication with the clients, aids their needs. The respondents suggested some improvements to the service: 1) bigger variety of the movies, as they feel sometimes is airing the same movies; 2) not be limited by the schedule and 7 days programming, as most feel a negative factor for the service use; 3) Personalization once again is mentioned and stated as important to the use of the channels; 4) option to watch in other devices, besides tv; 5) the point 2, came with the suggestion of having available, in a library, movies that already passed before 7 days or even 1 month
unsubscriptions thoughts	only 2 out of 19 though on unsubscribing TVC&S
Target 2 – SUBSCRIBED TVCINE & SÉRIES IN THE PAST	
Motivation for un-subscription action	What makes people stop subscribing TVC&S has to do with the price not being worthy for the low use of the channels, finishing contracts that offered free TVC&S and the appearance of Netflix
Factors that would change subscription action again	If there was a price scheme, where each channel could be sold and subscribed in separated, the respondents would consider subscribing the channels. However, the perception that TVC&S is not a must have premium Channel for movies and TV Shows, is not favoring this action. Finally, the linear model has negative impact in the use of TVC&S.

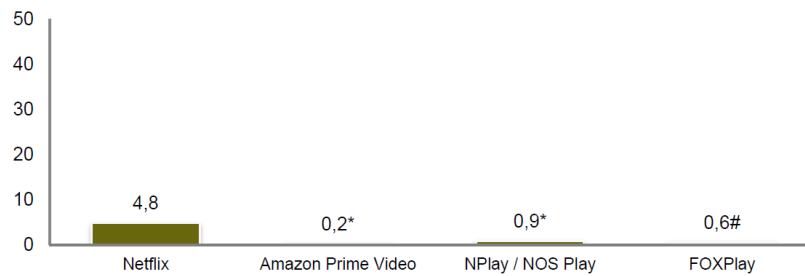
Appendix 5 - Product(Film) distribution path in Portugal



Source: Head Manager of Lusomundo TV – Antonio Teixeira Interview
 *Desde que os filmes entram/saem no cinema

Appendix 6 - Anacom data

Graph 3 – Subscrição dos serviços de video streaming on demand, 4T 2017



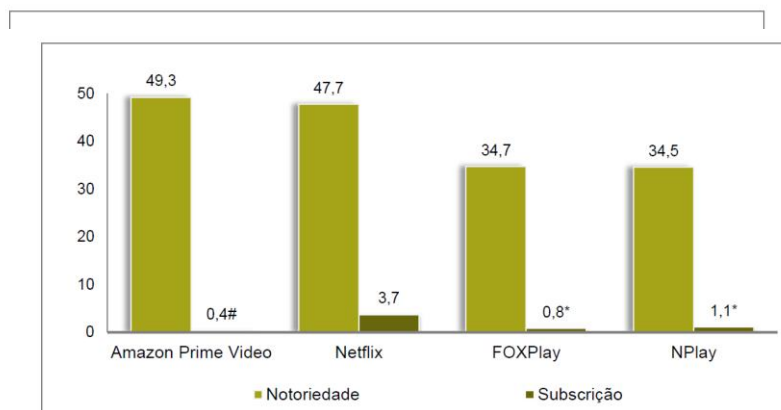
Unidade: %.

Fonte: ANACOM com base nos microdados do BTC da Marktest, 4T2017.

Base: Indivíduos com 10 ou mais anos

Nota: Significado da sinalética das estimativas: (#) Estimativa não fiável; (*) Estimativa aceitável; (sem sinalética) Estimativa fiável.

Graph 4– Notoriedade e subscrição de serviços de vídeo streaming on demand, 3T 2017



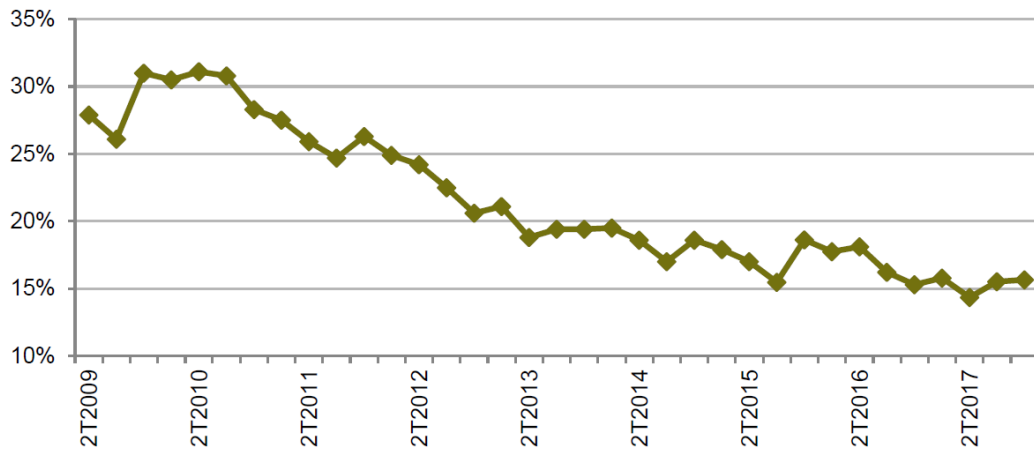
Unidade: %.

Fonte: ANACOM com base nos microdados do BTC da Marktest, 3T2017.

Base: Indivíduos com 10 ou mais anos

Nota: Significado da sinalética das estimativas: (#) Estimativa não fiável; (*) Estimativa aceitável; (sem sinalética) Estimativa fiável.

Graph 5– Acessos a canais premium, 4T2017

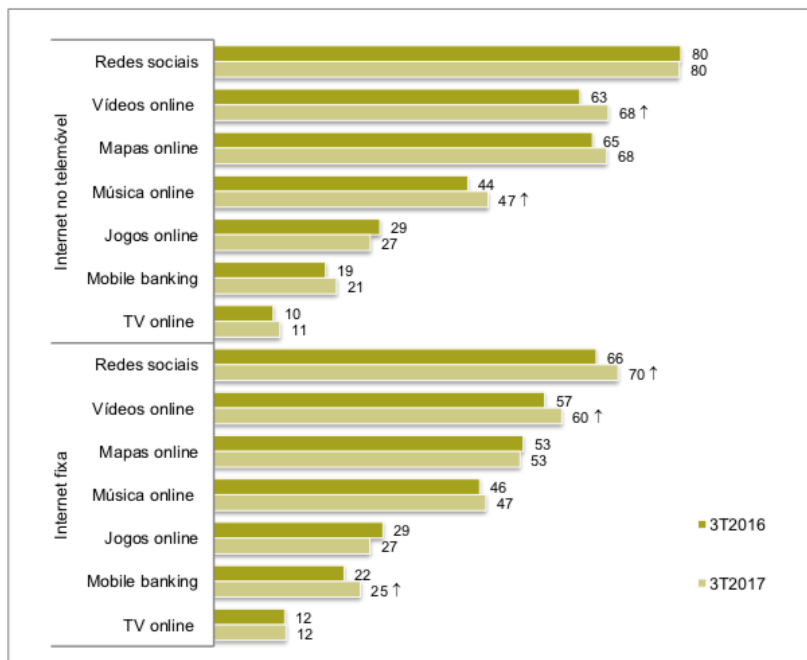


Unidade: %

Fonte: Markttest – *Estudo Barómetro de Telecomunicações*, 2T2009 a 4T2017

Base: Total de lares com serviço de comunicações eletrónicas de voz e com serviço de distribuição de sinais de TV por subscrição (não inclui as não respostas).

Graph 6 – Internet services activity by portuguese consumers



Unidade: %.

Fonte: ANACOM com base nos microdados do BTC da Markttest, 3T2016 e 3T2017.

Base: Indivíduos com 10 ou mais anos com Internet no telemóvel; Indivíduos com 15 ou mais anos com Internet fixa em casa

Nota: As estimativas são todas fiáveis (coeficiente de variação inferior a 10%)⁴. Não se verificam diferenças significativas face ao trimestre anterior.

Appendix 7: Benchmark on Pay TV operator integrating OTT and vídeo streaming services in their Business Models

Uma das grandes tendências a nível mundial é a existência de uma plataforma de SVOD gratuita para os subscritores dos canais premium de cinema e séries

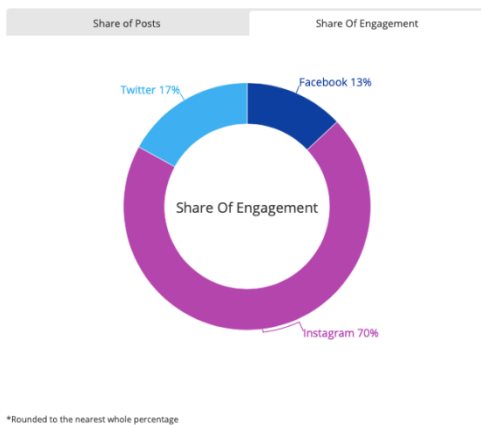
Canais TV Cine e Séries são o único pack de canais premium de cinema e séries que não possui a sua própria plataforma de SVOD gratuita para subscritores

Canal Principal	SVOD	Canal Principal	SVOD	Canal Principal	SVOD
Estrenos	movistar	Bé 1	Bé A la demande	PREMIUM CINEMA	PREMIUM PLAY
OCS MAX	OCS GO	PLAY MORE Cinema	Play More	C MORE FIRST	C.MORE PLAY
sky CINEMA PREMIERE	sky CINEMA UNO	film PREMIERE	film	HBO CINEMAX	HBO GO CINEMAX
sky CINEMA	sky On Demand	VIASAT FILM PREMIERE	viaplay	TELECLUB CINEMA	TELECLUB NOW
m+s	m+s	SHOWTIME	SHOWTIME ANYTIME	epix	epix On Demand
STARZ	STARZ ON DEMAND	CANAL+H	CANAL+PLAY	altice STUDIO	SFR PLAY
TELE CINE	TELE CINE OPLAY				

Appendix 8: Share of Engagement per Social Media Platform.

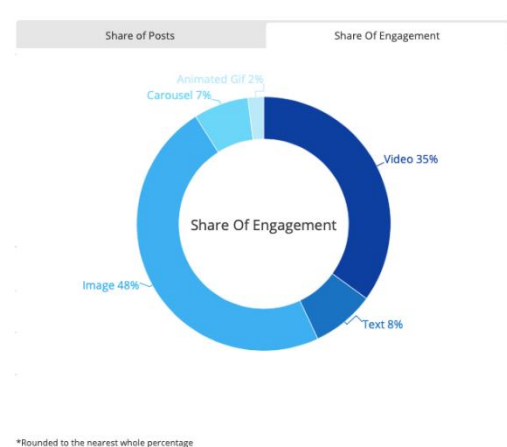
Source: Nielsen's Social Content Ratings

Graph 7 – Share of engagement by Platform

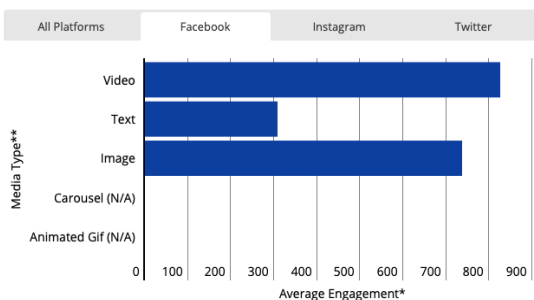


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Graph 8 – Share of engagement by format



AVERAGE ENGAGEMENT PER OWNED POST

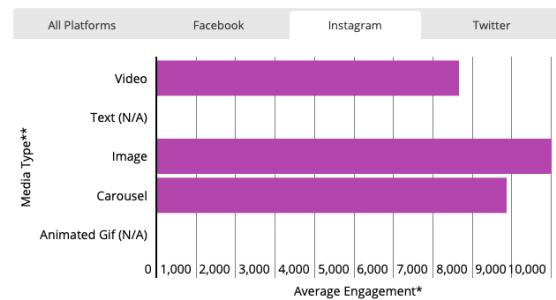


*Average engagement is the average number of comments, likes, posts, Retweets, shares etc. generated off of a post or Tweet across Facebook, Instagram and Twitter

** Media types by platform: Instagram includes images, videos, and carousel formats; Twitter includes text, image, GIFs, and video formats; Facebook includes text, images and videos formats

Graph 9 – Avg. Engagement on Facebook by type of format content

AVERAGE ENGAGEMENT PER OWNED POST



*Average engagement is the average number of comments, likes, posts, Retweets, shares etc. generated off of a post or Tweet across Facebook, Instagram and Twitter

** Media types by platform: Instagram includes images, videos, and carousel formats; Twitter includes text, image, GIFs, and video formats; Facebook includes text, images and videos formats

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Graph 10 – Avg. Engagement on Instagram by format content

Appendix 9: Google Search for “Ver Filmes e Séries na televisão”

The screenshot shows a Google search for "filmes e series na televisão". The search bar is at the top, and the results are listed below. Two results are highlighted with red boxes:

- Canais de filmes e séries. Guia e Programação TV em Portugal ...** (https://portalnacional.com.pt/util/tv/canais-filmes-e-series/) - This result is highlighted with a red box. A note next to it says: "Here, TVC&S is identified as one of the channels to watch movies or series".
- Netflix Portugal – Veja séries de televisão e filmes online** (https://www.netflix.com/pt/) - This result is highlighted with a red box.

Other visible results include:

- Todas as TV Séries - AdoroCinema
- Filmes e Séries – Assistir TV Online VIP - Futebol, Filmes, Séries ...
- Categoria:Filmes baseados em séries de televisão – Wikipédia, a ...
- Como posso encontrar séries de televisão e filmes na Netflix?
- Melhores pacotes de canais TV com séries e filmes | Comparajá.pt
- Como assistir a TV, filmes, séries e desenhos no computador - Baixaki

Appendix 10: TVCine & Séries Bounce Rate (April 2017 – November 2018). Source: Google Analytics

