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THE FUTURE OF PROMISING TELEVISION CONTENT IS STUCK IN A RIGID SYSTEM OF TRADITIONAL STAKEHOLDERS.

AN EXTERNAL MARKET RESEARCH ON THE FUTURE OF TELEVISION CONSUMER BEHAVIOR IN THE NETHERLANDS ACCORDING TO TRENDS IN THE US AND UK.

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The Future of Promising Television Content is Stuck in a Rigid System of Traditional Stakeholders.

Executive Summary

Over the past two decades, leaders in the global economic broadcasting system have encouraged the liberalisation of the free market in hope that channels would spread the content of local shows to the rest of the world (European Commission). In recent years, however, awareness of the detriments of internet freedom has increased (McGrane, 2009). Broadcasters, networks, content producers and governments increasingly lost scrutiny on the organizations that power its freedom by providing (free) content anywhere anytime. Close analysis of case studies and comprehensive statistics show that the rigidity of television stakeholders, as well as the hypocrisy of the internet stakeholders and its often illegal online system, have prevented the benefits of freedom of information from reaching the world's television content consumers (McGrane, 2009). And because television is of great commercial interest, it is one of America's biggest export products, stakeholders are still trying to grasp the future of the television market (E. Karstens, 2010). Therefore, the question answered in this research is: **What additional effects will the accessibility of *online* television have on the consumer behavior towards *offline* television in The Netherlands according to trends in the US and the UK?**

In order to justify researching future developments in the Dutch television market according to trends in the US and the UK, the first sub-question regards the history of the US and the UK television trends influencing the market in the Netherlands. And it shows that when dealing with or creating new technologies, the US, the UK and the Netherlands tend to follow the same evolutionary path in a different time slot and the time gap between such evolutions is decreasing to the benefit of the Netherlands (E. Karstens, 2010).

When defining the key words of online television content consumption and offline television content consumption one finds the terminology is in need of an update. Offline television is regarded as the traditional TV whereas online television covers all other forms. However, research company Nielsen, also responsible for stating US ratings, is planning to redefine this in order to increase accuracy of consumer behavior researches (Littleton, 2013).

While researching additional effects the accessibility of online television has on traditional television, one finds that the European Union could play a severe role in this process by subsidizing local production and thereby creating an opportunity for small new dynamic entrants in the television market. One will also find that due to new online developments, existing portfolios of television apps, online services and other portals accessing audio-visual content must be made easier and faster for everyone regardless of place or time. Furthermore, online services will pressure the need of television enhancing its social character to justify increasing consumer spending on television

instead of switching to a PC or laptop. On top of that, availability of online content, legal or illegal, increases consumer demands for easy access towards such content. Additionally, serving consumers online improves advertisement value because it is extremely measurable and therefore more attractive to marketers. And finally, the traditional television market should learn from the music market by letting go of being stuck in the 5 phases of loss and grief, meaning denying and repressing innovations and answering the need for complete new revenue models. Traditional stakeholders should instead embrace a new television market with new innovative entrants.

All these trends respond to the research question with the following conclusion: More likely effects caused by online television content consumption on classic television consumption in the Netherlands are mainly technological potential being repressed by traditional stakeholders. Due to the restriction of technological developments the following trends occur in the near future: strengthening of the local content market by EU subsidizing, new content services and platforms gaining more customers, increasing interaction between television programs and consumers by social media or the use of second screens, and meeting a small part of new consumer demand by offering enhanced online and offline combined services.

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1. Introduction

Whereas the television is not honored with its own verb, “to google” is a socially acknowledgable verb since 2003 (Weingarten, 2012). Is this fact proof of online activities enjoying higher value than offline activities in society? And is this a trend towards online services replacing classic offline uses?

Some people believe television watching on a classic television device could become history, while others see it as the source of another world wide hype (Deloitte, 2012). Over the past two decades, leaders in the global economic broadcasting system have encouraged the liberalisation of the free market in hopes that channels would spread the content of local shows to the rest of the world (European Commission). In recent years, however, awareness of the detriments of internet freedom have increased (McGrane, 2009). Broadcasters, networks, content producers and governments increasingly lost scrutiny on the organizations that power its freedom by providing (free) content anywhere anytime. Important rising influencers are online streaming services such as Netflix, nongovernmental movements such as The Pirate Bay and the power of major advertisement tycoons such as Google. Close analysis of case studies and comprehensive statistics show that the rigidity of television stakeholders, as well as the hypocrisy of the internet stakeholders and its often illegal online content economic system, have prevented the benefits of freedom of information from reaching the world’s television content consumers (McGrane, 2009). And because television is of great commercial interest, it is one of America’s biggest export products, stakeholders are still trying to grasp the future of the television market (E. Karstens, 2010). Therefore, the question in this research is: What additional effects will the accessibility of ***online*** television have on the consumer behavior towards ***offline*** television in The Netherlands according to trends in the US and the UK?

In this research one first finds a justification for basing a research on television trends in the Netherlands on results in the US and the UK. The motivation for this angle is to be found in the first chapter which researches the history of the US and the UK influencing the Dutch television market. Afterwards, the definition of offline and online television content is given in chapter 3.2. Chapter 3.3 continues with a research on what the differences are between the opportunities stakeholders have in the US, the UK and The Netherlands when dealing with the influences of online television content consumption. Next, in chapter 3.4, the differences between the portfolios of online and offline television content formats in the US, the UK and the Netherlands are highlighted. Chapter 3.5 follows with a study on the differences between the consumer behavior of the Americans, British and Dutch regarding online and offline television content. Chapter 3.6. compares the results of collaborations between online and offline television content in the US, the UK and The Netherlands. And finally, the last sub-questions researches power relationships influencing new developments in a digital content market. This leads us to an answer contributing to an external market analysis of the changing consumer behavior of offline and online television consumption in the Netherlands according to trends in the US and the UK.

2. Research Methods

The research question I have studied is: What additional effects will the accessibility of *online* television have on the consumer behavior towards *offline* television in The Netherlands according to trends in the US and the UK?

I have chosen this particular research question because it relates to all television stakeholders, which is important as the television market is dependent on many variables (E. Karstens, 2010). On top of that, it can add information to what to expect in the near future in this specific media landscape. More grounds for why I chose this particular research question are that television is of great influence on the behavior of society as well as the government (Wessels, 2008), the changing television market is an international issue (European Commission), television is a big economy itself (E. Karstens, 2010) and according to recent statements more research is needed (de Telegraaf, 2013). As a European Studies student, who often focuses on European legislation, going hand in hand with consumer behavior, I find this very interesting and of great value.

Secondly, I chose to base the research on the results of the trends in the US and the UK. Even though there are structural differences and different user manners, the television market in the US is from a European point of view a good predictor of its own television market. Who takes a time machine will see that over many years the US predicts the future of the European market. In the US the private television market is, as we know it today, created and furthermore developed. The experimentation with new programs takes place in the US and a program is copied in Europe after a successful experimentation. Since a few years there is a reverse on this trend. There are broadcast concepts from Europe, often from creative television land the UK, which are exported to the US. Examples of exporting successes from the UK are the English formats: “Who wants to be a millionaire?” and “Pop Idol” (E. Karstens, 2010).

Thirdly, I have narrowed down the research to the effects of online television consumption on the consumer behavior of offline television consumption. I chose to use only the online television consumption as an external factor, because the television market is a complex market. When dealing with only the production side of television content, many stakeholders are involved in various relationships. There are even more external variables when dealing with interactive television content consumption. Therefore I researched one external variable, because this particular variable has many effects on all the stakeholders, who work together, but react differently. Another reason for only researching the effects internet has on television is that online possibilities involve interesting aspects such as: technological innovations, new consumer behavior and new television content formats.

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As the internet, which enables online consumption, is an external factor in relation to the offline television market, this research can be regarded as an “external market research”. In line with the external research approach, parts of the DESTEP model and the Five Forces of Porter model have been implemented. Although, these models are not the foundation for the research, segments of these models are useful and have been included. The models are not included as a whole, because the DESTEP model asks for a strong focus of an organization. Whereas, this research is written without the focus of a specific organization. The Five Forces model of Porter is not the base of this research as well, due to its lack of ability to enclose a dynamic environment with fast changing factors in its analyses, such as the television and internet market (Wheelen, 2008).

After creating seven research questions, the research started. I conducted solely desk research, because there are many different recent reports available on this topic. Advertisers, broadcasters and even the Dutch government have approached the changing television market in The Netherlands as a pressing topic (Waas, 2012). Because of the high quality researches available done by GFK, PWC, Deloitte, and Nielsen, I was able to use these reports and their surveys. I perceived the liability of references used in this report as high, because of, for example, the results of the Dutch viewer rating organization, Stichting KijkOnderzoek are used by television stakeholders as well.

Furthermore, social behavior has become more and more measurable for the last five or ten years. Whereas it used to be almost a study like philosophy, due to the digitalization of society it is possible to research numbers which enables the creation of models and theories. How people react to new inventions is different every time because the human has a “free will”, but we choose from a sort of same pallet of choices and often favor one way. Therefore it is possible to strive to predict what is likely to happen (Pardijs, 2013).

3. Results

3.1. History of Television

"Television brought the brutality of war into the comfort of the living room. Vietnam was lost in the living rooms of America, not on the battlefields of Vietnam" (Marshall McLuhan, 1975).

The quote of Marshall McLuhan shows a new media is responsible for the declining power of classic media. The US was first to losing a war because of the use of new media, in this case, television broadcastings (Neuman, 2008, pp.82). However, the US was not the last, as Europe followed with protests on the war in Vietnam due to new media communication as well (Maar, 2007). Before one can answer the research question on what the effects of online television consumption are on the offline television consumption it is important to understand why the US and UK play such a significant role in developments in the Dutch television market. Therefore the following sub question will be researched in this chapter:" What trends in the US and the UK have influenced the television market in the Netherlands in the past?"

The birth of television in the US, UK and the Netherlands

To realize television broadcasting, a long process of experimenting, testing and improving took place. The three countries researched all have in common that there was quite a time gap between radio broadcasting and television broadcasting (Burrell, 2010). Moreover, all countries experimented with broadcasting images, sound, and later on broadcasting moving images with sound at the same time (History, 2013). In this research the birth of television broadcasting will be defined as: The first time a television program is broadcasted to a larger group than a test panel. Preferable a broadcasting to the public on a national level including film and sound at the same time.

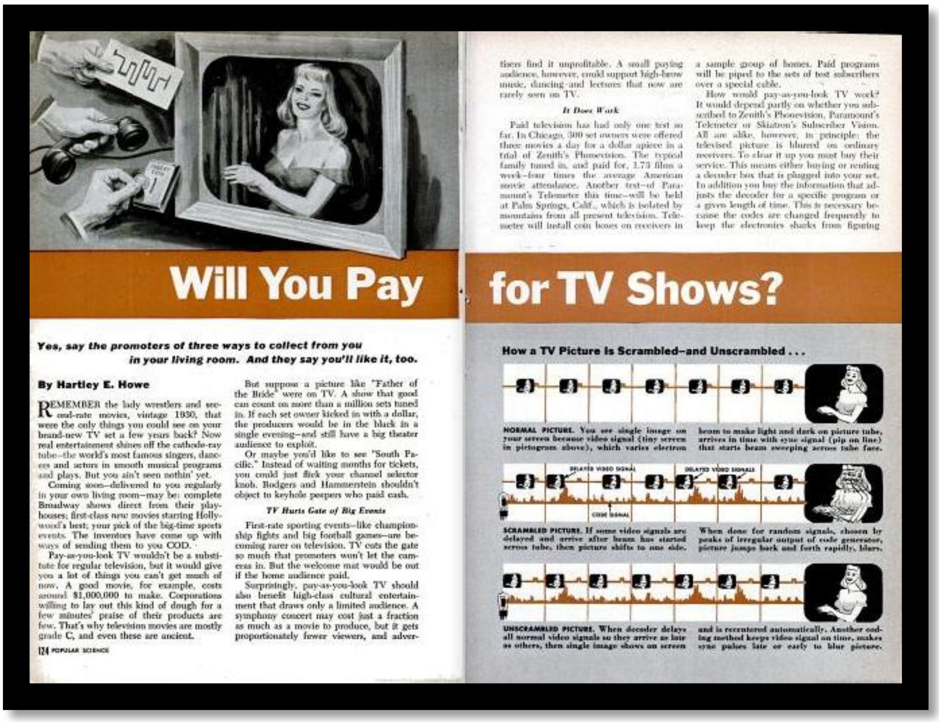
The British were the first who got high-definition public television programs broadcasted on 26th August 1936 (Tuft, 2013). Approximately three years later, the US followed by broadcasting its first television program; a pro football game: NY Giants vs. WA Redskins on April 20th in 1939 (Udelson, 1982). Twelve years later, 20.15PM, Tuesday night, October 2nd in 1951, the first television broadcasting took place in the Netherlands (Hoekstra, 2001).

Characteristics marking the current way of television watching in the Netherlands, has evolved by inventions that were done in the past. Significant happenings in television history are the introduction of color TV, the first commercial, video recording, Pay TV and legal online streaming (E. Karstens, 2010). The US broadcasted color TV since 1953 (Radiovisie, 2007), the UK in 1966 (BBC) and the Dutch achieved doing so on September 21, 1967 (Radiovisie, 2007). The first television advertisement ever was broadcasted in the US on July 1, 1941 (Bulova, 2013). In the UK, the first commercial was broadcasted on 22 September 1955 (The Independent, 1995). And the Netherlands had their first television commercial on January 2, 1967 (VPRO, 2007). It is said that Dutch television advertisers learned more about the profession from the British (Koren, 2007).

The first video recording started in the US when CBS recorded the show "Douglas Edward and the News" in New York, 30th November 1956. The ability to record and broadcast later was important for the US, because the country has different time zones primetime in New York is afternoon in California. In the UK the first domestic video recorder was brought on the market by the Nottingham Electric Valve Company in 1963 (BBC, 2013). Because the product was a failure, the Sony CV-2000, launched in the US in 1965, this is considered to be the first home video recorder (Sale, 1995). In the Netherlands, Philips brought the first domestic video recorder, the VCR 1500, on the market in 1972 (Vleuten, 2009).

When researching the subscription based model, also called Pay TV, one can find the Americans were experimenting with this model in 1952 and gradually developed it into today's market model (Hammond, 1952). The 1990s new "license to print money" model in the UK was their kickoff of Pay TV channels. The model enabled a new source of television revenue through subscription (Parliamentary, 2010). In the Netherlands, the channel "Sport 7" failed to be the first Pay TV channel in 1996 (Wijnen, 2011). Canal+ did succeed with the actual first Pay TV channel, Eredivisie Live (Langeslag, 2008), on 29 August 2008 (Dagblad de Limburger, 2008).

Figure 1: US Journal writing on recent results when experimenting with Pay-TV.



Will You Pay for TV Shows?

Yes, say the promoters of three ways to collect from you in your living room. And they say you'll like it, too.

By Hartley E. Howe

REMEMBER the lady wrestlers and second-rate movies, vintage 1930, that were the only things you could see on your brand-new TV set a few years back? Now real entertainment shines off the cathode-ray tube—the world's most famous singers, dancers and actors in smooth musical programs and plays. But you ain't seen nothin' yet.

Coming soon—delivered to you regularly in your own living room—may be: complete Broadway shows direct from their playhouses; first-class new movies starring Hollywood's best; your pick of the big-time sports events. The inventors have come up with ways of sending them to you COD.

Pay-as-you-look TV wouldn't be a substitute for regular television, but it would give you a lot of things you can't get much of now. A good movie, for example, costs around $1,000,000 to make. Corporations willing to lay out this kind of dough for a few minutes' praise of their products are few. That's why television movies are mostly grade C, and even these are ancient.

But suppose a picture like "Father of the Bride" were on TV. A show that good can count on more than a million sets tuned in. If each set owner kicked in with a dollar, the producers would be in the black in a single evening—and still have a big theater audience to exploit.

Or maybe you'd like to see "South Pacific." Instead of waiting months for tickets, you could just flick your channel selector knob. Rodgers and Hammerstein shouldn't object to keyhole peepers who paid cash.

TV Hurts Gate of Big Events

First-rate sporting events—like championship fights and big football games—are becoming rarer on television. TV cuts the gate so much that promoters won't let the cameras in. But the welcome mat would be out if the home audience paid.

Surprisingly, pay-as-you-look TV should also benefit high-class cultural entertainment that draws only a limited audience. A symphony concert may cost just a fraction as much as a movie to produce, but it gets proportionately fewer viewers, and advertisers find it unprofitable. A small paying audience, however, could support high-brow music, dancing and lectures that now are rarely seen on TV.

It Does Work

Paid television has had only one test so far. In Chicago, 300 set owners were offered three movies a day for a dollar apiece in a trial of Zenith's Phonevision. The typical family tuned in, and paid for, 1.73 films a week—four times the average American movie attendance. Another test—of Paramount's Telemeter this time—will be held at Palm Springs, Calif., which is isolated by mountains from all present television. Telemeter will install coin boxes on receivers in a sample group of homes. Paid programs will be piped to the sets of test subscribers over a special cable.

How would pay-as-you-look TV work? It would depend partly on whether you subscribed to Zenith's Phonevision, Paramount's Telemeter or Skiatron's Subscriber Vision. All are alike, however, in principle: the televised picture is blurred on ordinary receivers. To clear it up you must buy their service. This means either buying or renting a decoder box that is plugged into your set. In addition you buy the information that adjusts the decoder for a specific program or a given length of time. This is necessary because the codes are changed frequently to keep the electronics sharks from figuring

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How a TV Picture Is Scrambled—and Unscrambled . . .

NORMAL PICTURE. You see single image on your screen because video signal (tiny screen in pictogram above), which varies electron beam to make light and dark on picture tube, arrives in time with sync signal (pip on line) that starts beam sweeping across tube face.

DELAYED VIDEO SIGNAL
DELAYED VIDEO SIGNALS
CODE SIGNAL

SCRAMBLED PICTURE. If some video signals are delayed and arrive after beam has started across tube, then picture shifts to one side. When done for random signals, chosen by peaks of irregular output of code generator, picture jumps back and forth rapidly, blurs.

UNSCRAMBLED PICTURE. When decoder delays all normal video signals so they arrive as late as others, then single image shows on screen and is recentered automatically. Another coding method keeps video signal on time, makes sync pulses late or early to blur picture.

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Another current example of trends happening in the US and the UK and moving to the Netherlands is to offer legal online streaming. This format is also known as internet television, internet TV or online TV. It is the digital distribution of television content via the internet. These techniques must not be confused with Web TV, which includes short programs or videos created by companies or individuals. Common use of internet television is watching catch-up TV (E. Karstens, 2010). Watching television online became a great success in the US by 2004. Smaller television channels switched, due to high competition from cable television, to internet TV in 2004 (Hansell, 2006). In the Netherlands, such a great success of online television watching came with the service Uitzending Gemist (Broadcasting catch-up). The service originated from putting news fragments on the internet followed by uploading short movies in 2004 (NRC Handelsblad, 2012) and turned out to be a great success in 2006 (Media Onderzoek, 2006). In the UK, online television watching became a part of the everyday life when the BBC launched its BBC iPlayer in 2007 (Flanagan, 2008) .

A negative trend coming over to the Netherlands is television commercial budgets decreasing in priority at the advertising companies. *'This trend is going on for a few years and is coming from the US and UK to us'* said T. Himpe of the advertising agency "De Mortierbrigade" (de Tijd, 2005). Even the Dutch way of covering political topics on television is claimed to have been changed under the influence of the American media (Gelderblom, 2010). On top of that, Dutch television programs are applying the American sitcom format by implementing more segmentation for the benefit of advertising opportunities (Maarse, 2009). The latest extensive research on Dutch television, which was done by Deloitte and GFK, concludes that the US is a more advanced TV market compared to the Netherlands. It underlines this view by applying trends in the US towards "the willingness to pay for TV" as a predictor for the Dutch market (Deloitte, 2012).

3.2. Definition of offline and online television content

In 1997 major players in television discussed the new phenomenon "convergence", representing the blending of the computer, television and telephone into a single product. This new device was described as the "teleputer" and the device would be capable of delivering interactive multimedia applications (Schuerholz, 1997). Yet, it was not until the first decade of the millennium that the evolution of integrating internet in television watching took place in daily lives. Convergence became online television, the teleputer became a Smart TV. And six years ago the San Francisco Chronicle published the article titled: *"That soft blue glow at night may not be a TV anymore; Next generation of viewers is turning to computers to watch their favorite shows -- shift is an open door to video-streaming industry"* (Berton, 2006).The article describes how companies and consumers are changing due to new technology inventions. It also states the struggle to adapt to the new consumer behavior.

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Now, in 2013, it is still not clear what is the best way to react to changing consumer behavior in a fast developing digital world. The television business has more than six years of trial and error experience in the evolution of integrating internet in television watching. In order to clear the research question, the definition of television content will be stated. Therefore the sub-question of this section is: What is the definition of offline and online television content?

Offline television content

Offline television content watching is defined as all content on a television known as the regular television, which is described according the Longman Dictionary as: "a piece of electronic equipment shaped like a box with a screen, on which you can watch programs" (LDOCE, 2011). The television can be connected with the internet, because of its digital characteristics, but having access to the internet is an extra, not its main feature. It could be possible to watch television on this device without internet connection and only using a cable or satellite signal. The device where consumers watch this type of content is also referred to as the "alpha screen". The American research company Nielsen refers to it as "traditional TV" meaning: *"Watching live or time shifted content on a television set delivered by broadcast signal or a paid TV subscription"* (The Nielsen Company, 2013). The main difference between offline and online television content is the simultaneous character of watching offline television content. One puts on the TV and sees what broadcasters are broadcasting at the same time. On the contrary when watching online content one starts off with browsing for programs which are live or already available for a longer time slot (Deloitte, 2012).

Online television content

Technical developments provided television watching with more features. Most common devices where television content can be watched, other than on the classic TV are: the netbook computer, tablet, portable DVD player, e-reader, portable games console, MP3/MP4 digital music player, standard mobile phone, smartphone, compact or SLR digital camera and Laptop computer. A new phenomenon, because of such innovations, is second screening – the use of other screens while watching TV (Deloitte, 2012). The main characteristic when watching online television content is that one browses online for content , downloads or streams the chosen content, enabling to watch the content on any appropriate device. Streaming is when one plays the television content on the computer while it is being broadcast over the internet. Downloading is a different technique which asks for downloading the content and saving it into a file so that one can listen to it or watch it later (LDOCE, 2011). The Nielsen company states it will adjust its definition of "television watching" in 2013, due to new consumer behavior (Littleton, 2013).

3.3. Television broadcasting in the European Union versus the US.

A country's national television market model is set up by its government and has a severe part in the way stakeholders can react on changing consumer behavior. The political part of the DESTEP model is researched in this section, because all stakeholders in the three countries have different ways of dealing with new developments regarding its legislation possibilities. Therefore, the sub-question of this section will be: What different opportunities do stakeholders in the US, the UK and The Netherlands have, when dealing with the influences of online television content consumption?

The structure of the Television Market in the US

The stakeholders in the American television market can be divided in private and public stakeholders. The broadcasters are set to be "public trustees" as they have the exclusive right to broadcast over a "channel" of publicly owned radio frequency (Varona, 2004). According to the Federal Communications Commission (FCC) it is the broadcasters' task to provide the American people with a "window to the world" and therefore inform and enrich viewers (Federal Communications Commission, 2013). However, the public trustee idea is proclaimed to be a failure since its inception. Broadcasters consider themselves only public trustees when it fits them, such as when opting for more digital rights. Broadcasters work more and more according their own commercial agenda when covering local public topics, politics or other unattractive topics for marketers. For example, prime time advertising on major network affiliates went up with thirty-six percent between 1993 – 2003 (Varona, 2004).

From the beginning, the American market was able to have a strict commercial character and is in the position to build upon this easily. Nevertheless, cartel destinations have strong consequences for the structure conditions of the American television market (Moorthy, 2007). Also, the influence of the advertising based economy always has been stronger in comparison with the Dutch television (Ferraro, 2003). On top of that, a high number of channels are available and trending in the US market since the 80s whereas the Netherlands just started expanding their number of channels. A reason for the US having more channels than the Netherlands is that the American television market was heavily subsidized by the government. The financial resources were invested in regional channels and in creating a free and sustainable cable network throughout the country (E. Karstens, 2010). The project was called the National Broadband Plan (Federal Communications Commission, 2010).

Furthermore, the American television market is very suitable for experimenting with new formats. This is because the market model is geographically segmented. The segmentations are local or regional. An example of this would be the Oprah Winfrey show; it was created as a regional concept based in Chicago, where after it became successful and was expanded to a national level. The American market does not know a structure such as the Netherlands, where most of the programs are launched on a national level from the first broadcast. This is due to the high entry costs involved in broadcasting a show on national level in a big country such as the US. An American broadcaster launches a program rather on local level to limit losing big investments. In relation with this tactic, cartels of networks, senders and other stakeholders interact strongly with each other. The marketing model is based on syndication, which means that networks are putting their senders on air with the help of affiliates. The national level is acquired by getting a high percentage of the regional level, also called clearance. A clearance of 100% states the program is shown throughout the USA.

Furthermore, there are networks and broadcasters. Four broadcasters, who are often related to networks and a station, which belong to the Public Broadcasting Service (PB). The PB is the American equivalent to the Dutch “Publieke Omroep”. With that, every market has one or more independent channel. In the American market competition only takes place in the “radio waves “ area and includes more than a thousand competitors. The most well-known broadcasters are from networks ABC, CBS, NBC and FOX. Government regulation allows a broadcaster to have a limited number of owned television channels called O&Os (Owned and Operated Stations). This is a good example of the private character of the television market in the US. In the rest of the country networks sell contracts with prime time and programs to so-called affiliates every two years. (E. Karstens, 2010).

UK, Netherlands and the European Law

The UK and the Netherlands belong to the European Union, and are therefore obeying the European Law and legislation concerning “the direction of audiovisual media services” (European Commission). The most important aspects to do with the European legislation covering television are: protecting the consumers from harmful advertising, supporting the European export of television content and influencing commerce of television content. The latter, includes a quota regulation, which is implemented in national regulation as well. The purpose of this is, to reach a diverse landscape of film and television production. This diversity is asked, because the EU wants to protect their television market, especially against US movies and shows (E. Karstens, 2010). However, it is a “directive legislative act of the European Union” therefore member states can implement it in their own way (Bomberg, 1999).

In the UK and the Netherlands the financing models of national productions are bound to strict European Union regulations (European Commission). Since 1997 the direction “television without boarders” enables member states to define certain content as free content. This means that content classified as free content must not only be broadcasted in a locked Pay-TV system, but also on the

Free-TV channels. A well-known example of free content is the broadcasting of a major sports events such as the world soccer championship.

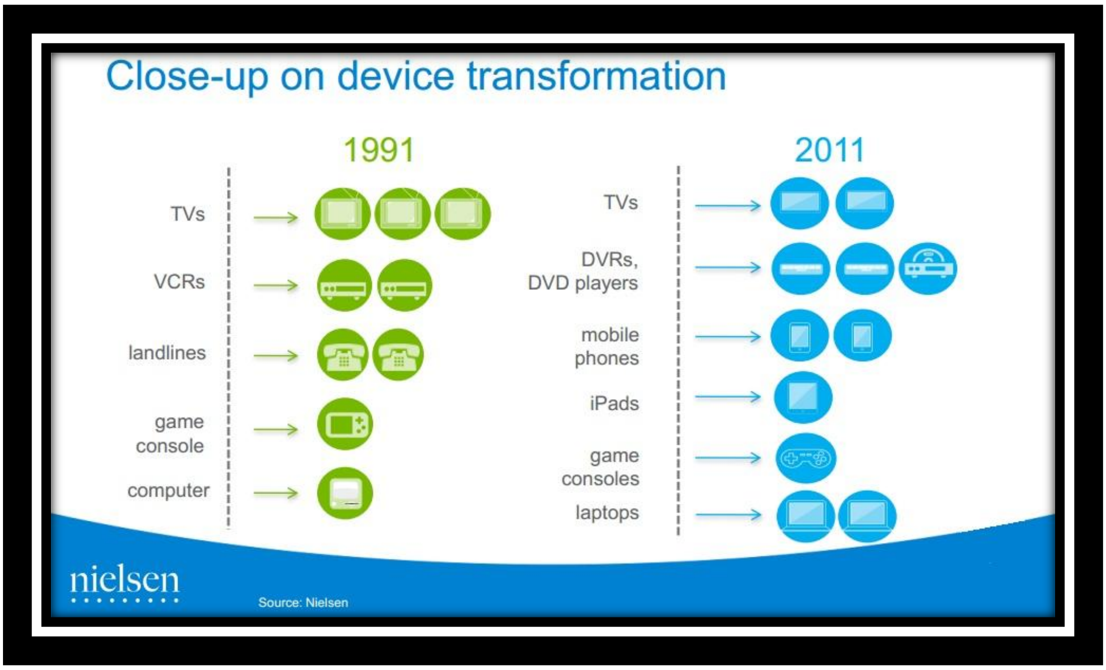
The European Union does not only limit broadcasters, but it also helped the television market by subsidizing the 3G network which contributes to the development of mobile television streaming. The 3G network delivered extra spectrum for new industry, more radio space and more bandwidth. The EU realized a contract limit to the maximum length of 24 months and the obligation to offer 12 month contracts for the benefit of consumers. Furthermore, the EU also plans to fund the development of the 5G technology, worth 50 million Euros, in 2013. On top of that, the development of the Connected TV is also high on the EU Digital Agenda (Plus Media Solutions, 2013).

3.4. Television Content Portfolios

"Much more than a DVR" is the slogan of TiVo, a revolutionary product concerning television content. TiVo is a pioneer in providing "on demand" content and changed the position of television watching in consumers' minds according television experts in 2007 (Clarke, 2007). However, Dutch consumers have not heard of TiVo unless in American or British movies or shows. This underlines the differences in platforms offered in the US, the UK and the Netherlands. This technological part of the DESTEP model is researched with the following sub-question: What are the differences between the portfolios of online and offline television formats in the US, the UK and the Netherlands?

One can find all of the platforms have in common that they originate trough a same technical evolution.

Figure 2: Close-up on device transformation (The Nielsen Company, 2011).



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Research companies Deloitte and GFK conducted similar researches on the use of platforms in the Netherlands (A new breed of media? Report on TV myths & truths) as well as in the UK (TV:Why?) in 2012. The platforms discussed in the reports of Deloitte and GFK are used in this research. Apart from these reports, research company Nielsen did a similar research in 2011 in the US (Cross platform is the new norm). The platforms discussed in this research regarding the US are selected from the Nielsen report.

UK

The formats of television watching, other than on the offline TV, can also be done through TV apps or portals to additional content. Examples of the latter are broadcaster on-demand sites and pure-play on-demand sites such as Netflix, LOVEFiLM or Blinkbox.

Inhabitants in the UK can also connect a TV with the internet and upgrade their TV from offline to online consumption. A TV can be connected to a PC and one can browse and watch video on demand (VOD). Another option is connecting the TV with the internet trough a game console, Apple TV, Roku or using a Personal Video Recorder (PVR) (Deloitte, 2012).

US

American broadcasters like Time Warner and Disney offer broader distribution rights to cable companies or other reselling technology players. This strategy is to pursue monetization of content across various platforms at minimal costs (Deloitte, 2012). Online television platforms that are used in the US are: Apple TV, HULU, YouTube, Google TV, Xbox, Wyplay, Access, Myriad, Metrological, Opera software and Amazon Prime (The Nielsen Company, 2011) .

The Netherlands

In the Netherlands are less online television platforms available than in the UK and in the US. Researchers explain that new innovations are not popular because the technological inexperience of costumers, license restrictions in the Dutch market and technical restrictions of the Dutch network. For example, there is mobile TV but because of numerous technical limitations regarding bandwidth it is not perceived a successful format. In addition, the Deloitte report advises the following regarding technological developments in the Netherlands; *"Rather than adding new features, the players in the value chain will have to focus on making access to audio-visual content easier and faster, anywhere and anytime"* (Deloitte, 2012).

According business analysts the platform Netflix has the potential to succeed in the Netherlands. In august 2012 Netflix claims to expand to the Netherlands, but so far nothing concrete is seen (Het

Financieele Dagblad, 2012). Another platform with potential to succeed in the Netherlands could be so-called "watch-anywhere-in-the-home apps". A watch-anywhere-in-the-home app is an app offered by a cable or IPTV company for consumers. The cable or IPTV company buys licenses and contracts in order to provide television content not solely on the television but also on a consumers' mobile phone and internet. Because a cable or IPTV company provides access to more mobile devices one is able to watch content anywhere in the home. The content is limited to the home because of legislation and rights difficulties. However, in the Netherlands, the number of fully functional app stores available is limited (Deloitte, 2012).

A successful platform in the Netherlands is Pathé Thuis when it was launched in 2011. This service started as an app for the smart TV-platform of Samsung. One can rent movies from the online offer of cinema conglomerate Pathé and watch it from the PC, laptop, LG smart-TV, Philips smart-TV, Samsung smart-TV (Sp!ts, 2011) and in the nearby future on iPad and Xbox (Algemeen Dagblad, 2012).

Threats of platform innovation would be piracy. On the contrary, the market in the Netherlands is traditionally a free-to-air market rather than a pay TV market therefore piracy does not have a unique selling point money wise. However, piracy could decline growth in the legal market when illegal formats mature (Deloitte, 2012).

The Future of Promising Television Content is Stuck in a Rigid System of Traditional Stakeholders.

Figure 3: Overview platforms of television content watching available in the UK, US and the Netherlands.

UK	US	The Netherlands
Google TV	Google TV	Google TV
Apple TV	Apple TV	Apple TV
Catch-up TV	Catch-up TV	Catch-up TV
PVR	PVR	PVR
Piracy	Piracy	Piracy
YouTube	YouTube	YouTube
PC VOD	PC VOD	PC VOD
Game Console (XBOX)	Game Console (XBOX)	Pathé Thuis
Netflix	Netflix	
TiVo	TiVo	
LOVEFiLM	HULU	
BlinkBox	WyPlay	
Roku	Access	
	Myriad	
	Metrological	
	Opera Software	
	Amazon Prime	
	Start Over	

Bandwidth

The amount of information that can be carried through a telephone wire, computer connection, or other connecting technology at one time is called bandwidth (LDOCE, 2013). In the near future the lack of bandwidth seems to be a restriction on further developments.

In the Netherlands most of the telephones and wireless devices used outside the home function on the 3G network. However, 3G is not sufficient for streaming television content (Deloitte, 2012). In December 2012, 4G licenses were auctioned in the Netherlands. The following four telephone companies bought rights: Tele2, KPN, T-Mobile and Vodafone (Alem, 2012). KPN is the first company with a concrete implementation strategy of the 4G technology. The company aims to service half of its customers with 4G by June 2013. All of the KPN consumers must be able to use the 4G network by June 2014. Vodafone announced that it will start the introduction of the 4G network as well in the summer of 2013. T-Mobile and Tele2 do not have announced an introduction strategy yet (Segenhout, 2013).

In the UK, the 4G network was first introduced in December 2012. Because of the merger between Orange and T-Mobile the new network branded Everytime Everywhere (EE) was able to launch its 4G service prior to the new radio waves auction held beginning 2013 (Williams, 2012). In January 2013 the following seven contenders bid for a slice of 4G airwaves: Vodafone, Telefonica, Hutchison 3G, BT, EE, PCCW, and MLL Telecom (The Huddersfield Daily Examiner, 2012). Recently, EE announced its target to bring 4G at more than half the UK population by June 2013. So far, 4G service in the UK solely took place in collaborations with multiple organizations (Wireless News, 2013).

At the end of 2007, Vodafone and Verizon Wireless developed an allegiance aiming to develop the 4G network in the US early 2010 (Global Telecoms Business, 2008). However, the company Sprint Nextel achieved this goal as it launched the first 4G network in the US by August 2010 (Svensson, 2013).

3.5. Consumer behavior

In 2013, researches show that businesses seem to be past the hype that internet will completely take over television (Deloitte, 2012). The question regarding what changes are likely to occur in the future in the Dutch television market remains unanswered, To answer that question regarding consumer behavior parts of the social-cultural aspect of the DESTEP model are covered in this section with the sub-question: What are the differences between the consumer behavior of the Americans, British and Dutch regarding online and offline television content consumption?

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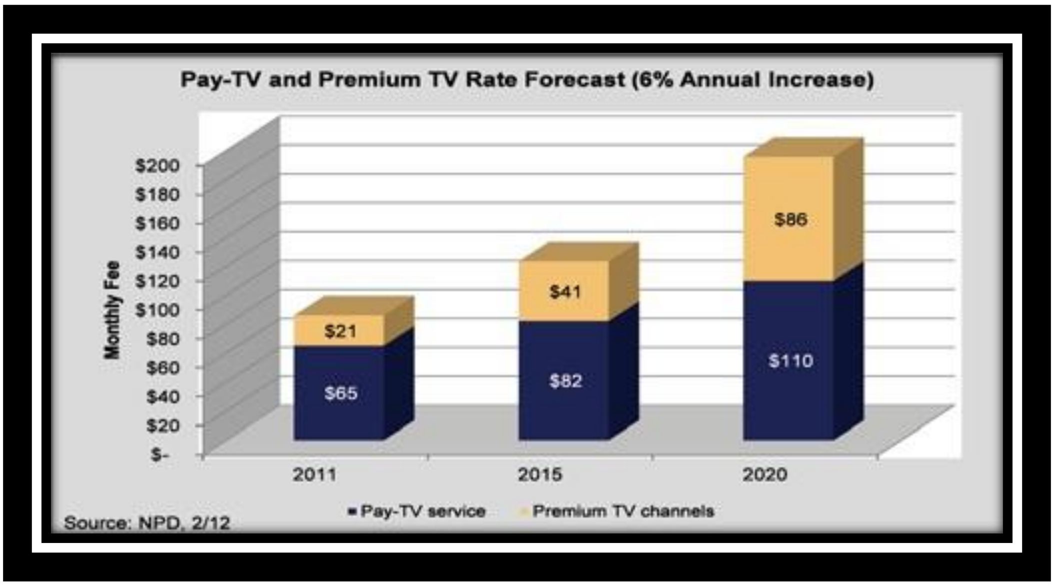
Standards

The average Dutch person watches 191 minutes of TV every day which results in spending 20% of every waking hour watching television. In the UK people watch TV for 242 minutes per day. Whereas in the US the total number daily spent on watching TV is 283 minutes (Deloitte, 2012).

People appear to be willing to spend more on television in the future according the Deloitte research (Deloitte, 2012). The unique contracts of the three main distributers are prized per month in the Netherlands. The analogue television product "Digitenne" of KPN costs €9.66 and the digital television product is available from €21.35. However, this amount covers one television device whereas an average household is in need of two televisions. Moreover, the amount €21.35 excludes the costs of the additional internet contract needed for the reception of the television signal, therefore the total amount adds up to €41.69 (KPN). UPC offers television from €18.20 and an upgrade to digital TV costs an added €5.50. If a consumer wants the connected TV product Horizon he or she pays €31.20 per month excluding the costs of the internet contract needed of €25. Therefore a complete UPC package with television content connected to internet adds up to €50 (UPC). Ziggo is offering Digital TV without a compulsory internet contract and offers a television contract already at €17.75. When one wants to subscribe at Ziggo for a package similar to the premium packages of KPN and UPC one must add €13.50 per month for extra options and buy an interactive receiver or other PVR. Ziggo recommends the costs for the receiver at €99 or €150 for the PVR (Ziggo). In the report "UK spending 2011 editions" one finds that consumers in the UK spend £6.00 on TV subscriptions per week (Office for National Statistics, 2012) and this makes the British spend £26.00 (€30.05) per month. The average costs spend on a television contract per month are $86 (€65.57) in the US in 2011 and expected to be $ 200 (€152.48) in 2020 (The NPD Group, 2012).

Figure 4: Pay-TV and Premium TV Rate Forecast US (The NPD Group, 2012)



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Values

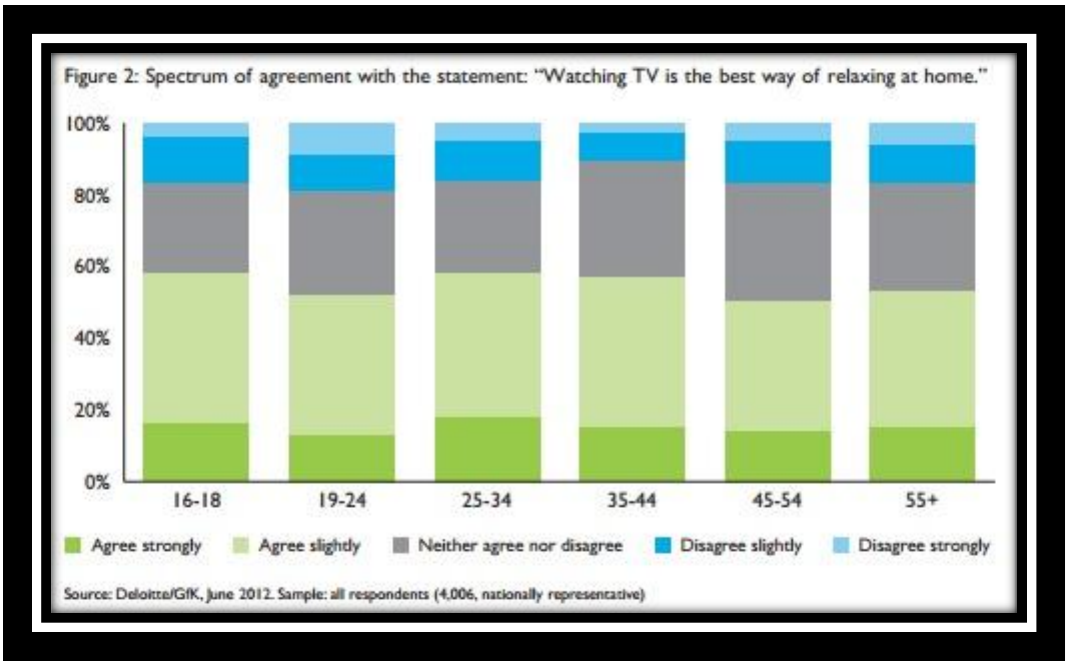
62% of the respondents feel that "of all the media types, television has the greatest power to change the way people think" in the Netherlands (Deloitte, 2012). This result is also seen in the US where 71% of the Americans rated watching TV on any device amongst their favorite media. In addition, 86% of Americans stated that TV advertising still has the most impact on their buying decisions (Deloitte, 2011).

Lifestyle

Television is the prime driver and binder of national passion during mega events. Results shown that millions of people watched the world cup games together in the Netherlands as well as people did in the UK (Deloitte, 2012). In line with this the US has a real "Super Bowl culture" (Teitler, 2013). During the Super Bowl an average of 108.41 million viewers watched the live broadcasting in 2013 (Baker L. B., 2013). 108.41 million viewers means that 34.54% of all US population watched the game according the numbers of CIA World Fact Book July 2012 (Central Intelligence Agency, 2012).

In addition, nearly 60% of participants in the Deloitte study on TV behavior in the Netherlands felt that TV was the best way to relax at home (Deloitte, 2012) and 57% of the woman strongly agreed with this statement in the UK. 50% of the men agreed with the statement: "Watching TV is the best way of relaxing at home" in the UK.

Figure 5: the UK results to statement: "Watching TV is the best way of relaxing at home" (Deloitte, T.V.:Why?, 2012)



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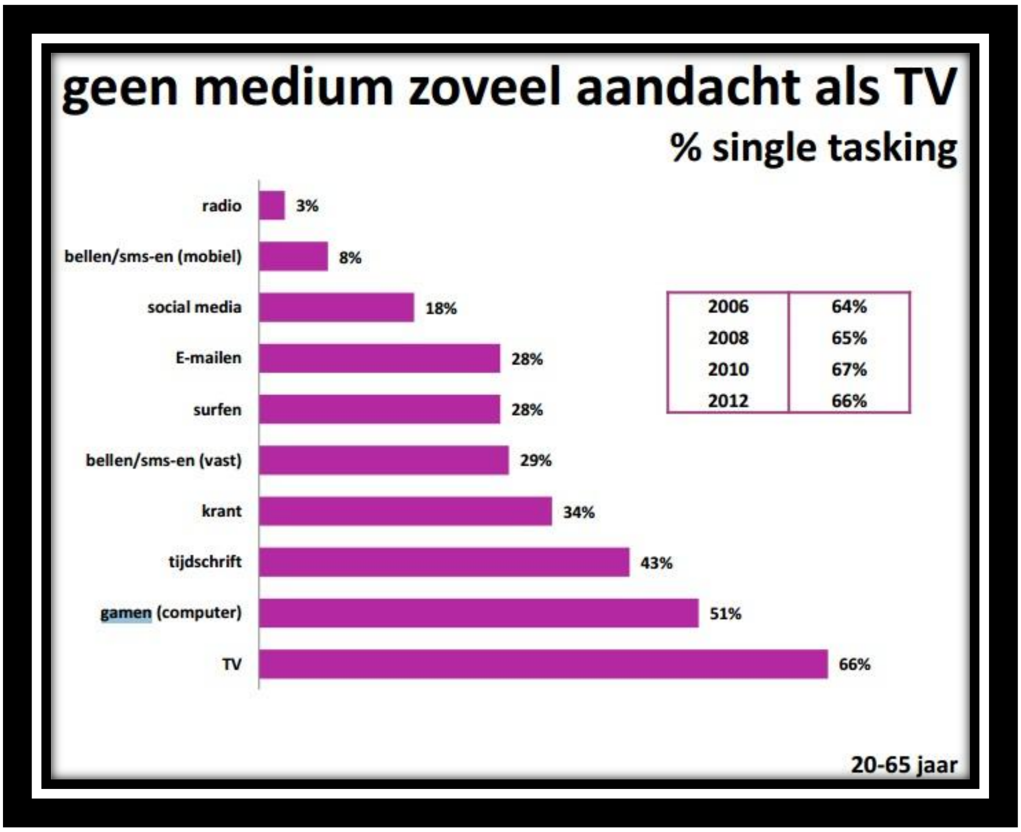
Moreover, in the UK consumer spendings on motion picture, video, TV, programming and broadcasting increased severely. While motion pictures fell by 7.7% in 2012 Qa3, with some feedback from survey respondents that the fall was due to reduced demand as people chose to play games rather than films or DVDs (Office for National Statistics, 2013). This trend of fall back due to games is not yet seen in the Netherlands. On the contrary, when organization SPOT researched the favorite device for using "single task" entertainment amongst Dutch consumers the popularity of using the television even increased in 2012 (SPOT, 2012) .

Figure 6: no medium achieves as much as attention as the TV (SPOT, 2012)



Social Trends

In the US it seems that the TV is leading rather than following social media and social network conversations are often fuelled by the latest TV shows (Deloitte, 2012). Another trend in the US is that people become tired of too much availabilities of channels (Wu, 2013).

Reports show that the amount of minutes respondents spend on watching audio visual content remains the favorite activity by far. However, when comparing television and the computer watching TV does decrease in its market share while the share of spending time surfing on the computers has increased in 2011. The share of the watching volume on the tablet has increased significantly compared to 2011, but it remains a limited share (Stichting KijkOnderzoek, 2013). This is similar to earlier results in the UK (Office for National Statistics, 2012).

Figure 7: minutes spend on total Audio Video- content per device in 2012 (Stichting KijkOnderzoek, 2013).

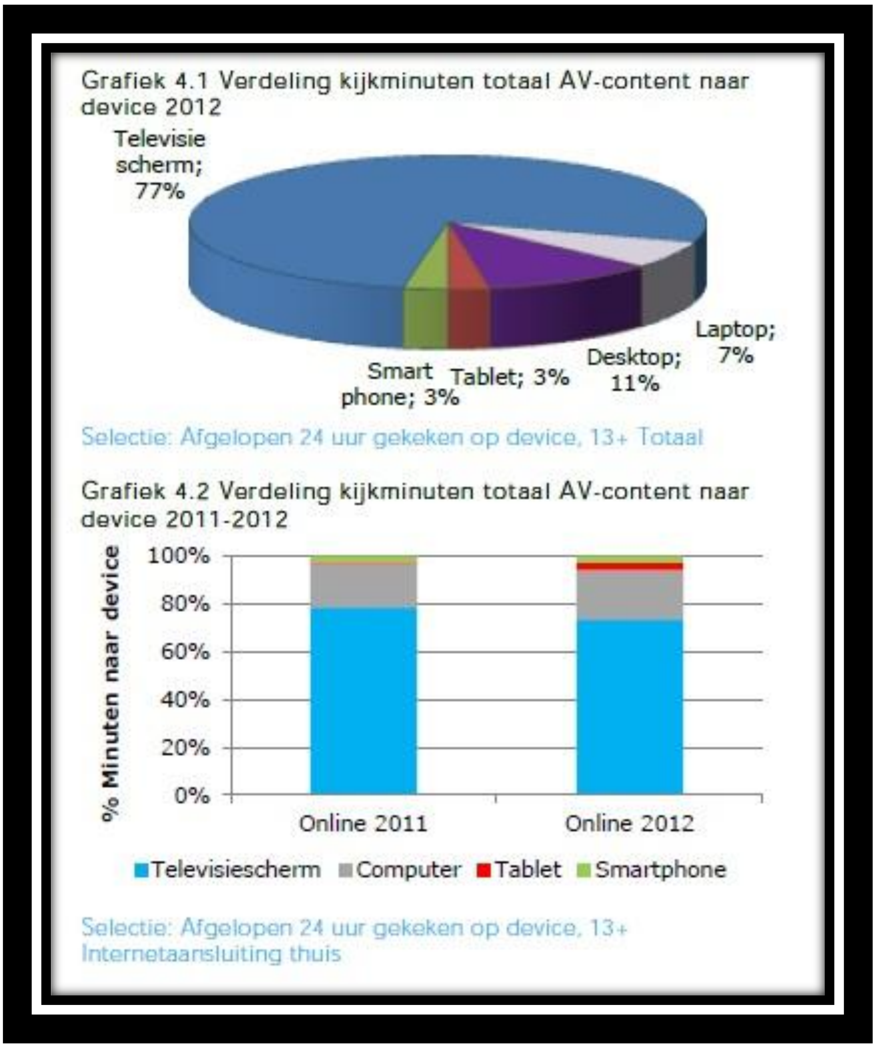
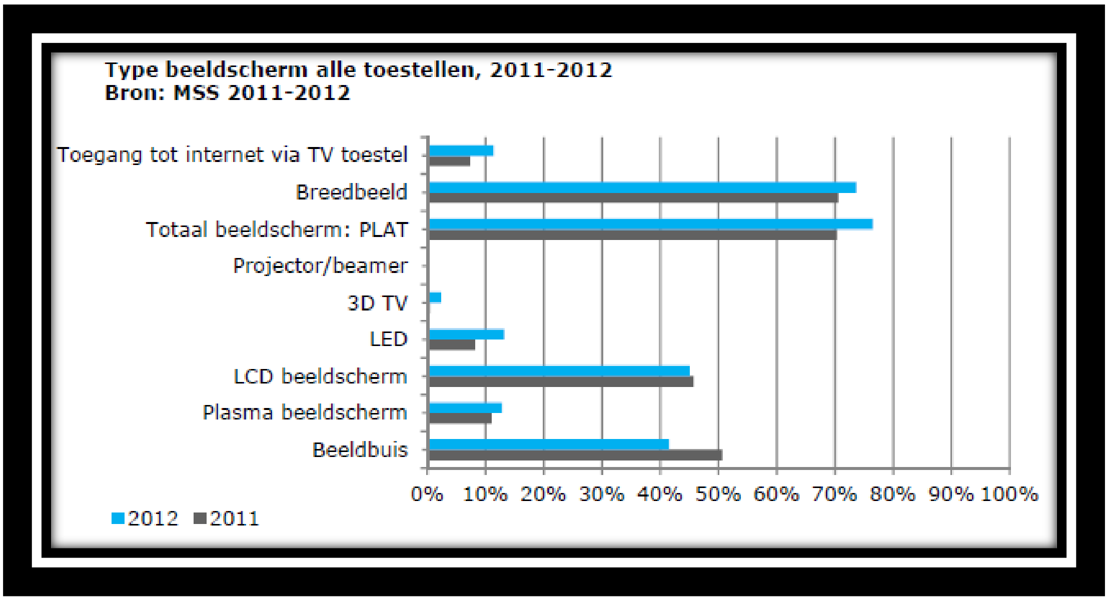


Figure 8: Television content watched divided per device (Stichting KijkOnderzoek, 2013).

The Smart TV has a direct connection with the internet also called NET-TV. The percentage of consumers using such a device increased with more than 10% in 2012 (Stichting KijkOnderzoek, 2013). In the US more than 25 million households possessed a smart-TV accounting for 7.8 % of the US population in 2011 (J. E. Vascellaro, 2012).

Figure 9: Increase of internet access via TV device in the Netherlands



Against all expectations of so-called "myth busters" the amount of TV households did drop in recent years in the US. The numbers decreased from 115.9 million in 2011 to 114.6 million in 2012 according an article publicized in February 2013. Some of the decrease of TV households happened because the shift from analog to digital excluded some older TV sets of participation in further researches another reason would be that the new generations is not watching via cable anymore. The new generation is referred to as "Cord Cutters" or "Cord Nevers" and they rely on internet-delivered content and never subscribe to cable, satellite or other contracts (Littleton, 2013). Furthermore, the percentage of Dutch consumers watching live broadcastings on the computer have increased significantly in comparison with 2011 (Stichting KijkOnderzoek, 2013).

3.6. Offline and online television content consumption working together

Reports conclude that internet is rather adding an extra dimension to television consuming than replacing the traditional television watching in the US, the UK and the Netherlands (The Nielsen Company, 2013) (Deloitte, T.V.:Why?, 2012) (Deloitte, 2012). Therefore the following sub-question is answered in this section; How are collaborations between online and offline television content approached in the US, the UK and The Netherlands?

Streaming service Netflix bought the high quality show 'House of Cards' for $100 million from cable television network HBO. The acquisition is an ideal case study on the way how offline and online television content can work together successfully in the US. A new show is often first aired on the traditional television and later on offered via online streaming or download possibilities. Netflix did not follow the traditional path companies use when launching new content but took a risk and released the entire season of 13 episodes all at once (Rosenbaum, 2013). The strategy worked out perfectly with millions of streams from its start (Lieberman, 2013) and additionally responded to the wishes of viewers who want to watch multiple episodes of series instead of waiting another week, also referred to as “binge viewers” (Rosenbaum, 2013).

In Europe the parallel use of television and internet is expected to grow just as in the US. Current results are that that much more non-linear content is shown on different sized devices such as phones, computers and televisions. According latest results the size of a device and the interactivity of a program are related because the more the interactivity of a program increases, the smaller the device turns out to be (Hermes, 2013). In relation with this, a Dutch success would be the trend to add an online game along a show. The online game “The Money Drop” of television content producer Endemol is played as a game by 18 million people. Furthermore, marketers experience that apps become another important income resource besides sponsor contracts (de Telegraaf, 2013) .

Combining traditional TV with online TV helps the development of television from “lean back” to a more “lean forward” medium. The parallel use of classic television towards online related television is about to grow. The most important characteristic of online related television is that online activities are better measurable and gaining higher accuracy on viewer numbers. The improvements of information results increase the value of an advertisement because marketers know exactly when a target group is reached and how to reach that particular target group. (Leber, 2013).

3.7. Power in a content industry

Despite having access to high technical innovations and extremely measurable consumer behavior results, the television market finds itself for over 15 years in the same situation in 2013. The function of watching audio visual (AV) content online is still not implemented successfully and one could wonder why this process takes so many years to succeed. In order to answer these thoughts a compare is made with another market strongly influenced by the internet and its suddenly free content model, the music industry. With brief help of the five forces model of porter a research is conducted on the effects that different powers have in the television market and how they can influence any developments. In this section the following sub-question is answered: “How do commercial interests and the balance of power amongst stakeholders influence the development of new strategies in a fast evolving digital market?”

New Competition

The pirate website Napster is perceived as being the first new competitor against traditional music labels with introducing the peer-to-peer file-sharing model in 1999. Consumers stopped buying CDs and started burning them and make their personal mix tapes and left the music industry astonished behind(Grant, 2011). With the help of the peer-to-peer file-sharing model artists were able to record their own music with free software available on the internet and share their productions without the interference of a label. High entry levels in terms of patents and rights faded and the music market became less safe for existing competitors. Due to the decreased value of services and products of traditional labels, traditional labels were determined to fight against the new developments with all tools and resources available within their power (Wasserman, 2003).

Substitute products or services

The CDs turned into MP3 files and labels were cut from the supplier chain with the help of the internet. In the internet age it is easier for an artist to promote oneself and manage its own release for the public. The biggest margin of profit used to be realized at labels because without the labels an artist did not have a distribution network, nor did one possess techniques to record, to promote oneself or to interact with fans. After the revolution Napster started an artist was no longer discovered during a local talent show or by submitting a physical demo to a label, instead MySpace was used as a talent pool. After years of developments MySpace evolved in YouTube, SoundCloud, Last.fm and matured in professional online platforms as “The Unsigned Guide” in 2013. The Unsigned Guide is a platform with multiple services such as: helping artists for £4.99 (€5.77) per month with tips and tricks in the online music business, offering access to a database of influencers in the industry and educating how to pursue a career as an artist without any label involved (Radio & Music, 2012).

Bargaining power of customers (viewers)

The Irish record industry failed to combat piracy when the High Court of Ireland rejected the music industry’s proposal to cut off the internet connections of people found to be sharing music illegally in 2010 (J. Collins, 2010). Customers enjoy more bargaining power when not bargaining at all because they can use pirate websites. Traditional companies are strongly against illegal downloading and have invested millions of dollars in lawsuits. However, the music conglomerate does not decide of what we listen to anymore in 2013 (Grant, 2011). The US companies decided to shift their focus from punishing individual citizens for piracy to prosecuting websites services enabling piracy in 2011 (Lindvall, 2011).

Bargaining power of suppliers

Later on, when traditional suppliers continuously lost the combat on new digital developments, new companies did think of innovative ways to make profit of legal music downloading. Apple iTunes came along, Grooveshark, Spotify and other initiatives were set up. However, traditional companies did not accept the bargaining power of suppliers and worked against such initiatives by not providing them licenses needed for a sufficient database or, in the US, labels and publishers still demanded too much money for such content by 2011 (Lindvall, 2011). During 2007 industry heavyweights EMI and Universal acknowledged the swift in content consumption and started providing low priced online services. It remained hard to compete against free, but revenues fell back less (The Sunday Business Post, 2010).

Intensity of competitive rivalry

The intensity of competitive rivalry was extremely high because music is a billion dollar business with high margins and used to have few competitors in a market with a high cost entry level. Therefore, big companies enjoyed convenience and profit for a long time and were not willing to give up that position. The reaction of the music industry on new competition such as Napster is to be called aggressive. Napster was shut down due to high costs of lawsuits and a settlement of $26 million to several artists. In line with this, Napster offered $1 billion trying to solve conflicts with traditional labels such as Sony, Warner and Universal in 2001. Despite all the costs and Napster losing sight the peer-to-peer file sharing model survived and took many forms, one well-known today is The Pirate Bay (Grant, 2011). In line with the remaining popularity of peer-to-peer-services a quote from the year 2000 on the lawsuit won by EMI against Napster says it all: “Whatever happens, the record companies’ victory is likely to be short-lived. The Web is too big and too international to be controlled” (Arends, 2000).

The 5 Stages of Loss and Grief

The developments in the music business can be divided in the 5 stages of loss and grief as described by Kubler-Ross in 1969 (Millstone, 2008).

1. Denial and isolation: “No, not me. It cannot be true”. During the first combat against piracy a lawyer for the US record companies strongly believed that the rules of the road are the same online as offline. In the lawyer’s opinion it could not be true that free content sharing is here to remain and that it will certainly not overcome main figures in the music industry (Arends, 2000).

2. Anger: “Why me?”. If businesses are in a crisis they research their performance and state their losses. EMI got aggressive when blaming “bad customers” for their piracy and put this into action with prosecutions (J. Collins, 2010).

3. Bargaining: “Yes, me. But if only…”. After the first two processes, record labels felt the need to regain control and pursued gaining so by being ”the first major music company to make its music available without digital rights management (DRM) software” (EMI Group Limited).

4. Depression. However, after all attempts made, EMI is discussed to be declared bankrupt in 2009 (Deeley, 2010).

5. Acceptance. “It’s OK.”. This fifth phase in the grief and loss model is marked by withdrawal and calm (Axelrod, 2006). Music company EMI withdraws when its owner Citigroup sells EMI for $4 billion In late 2011 (A. Edgecliffe-Johnson, 2011).

The position of heavy weights in the Dutch television market

When having a look at the Dutch television market, one can see it is marked by major players who have had a severe role in the business over multiples decades. RTL, Endemol, KPN, Philips, all (almost) Dutch stakeholders with several years achieving great financial successes in the Dutch television market. To give an idea of what the Dutch television market is worth some examples of profit numbers of important stakeholders are given. All stakeholders categories will be coverd starting with the broadcaster RTL which achieved a revenue of €696 million in 2011 (Algemeen Dagblad, 2012). Next, content producer Endemol achieved a growth of 10% and maked nearly €1.4 billion profit in 2011 (Endemol, 2012). Furthermore, Cable/IPTV operator KPN lost €3 billion in turnover and decreased its net revenue to €250 million in 2012 (ANP, 2012). In addition, device manufacturer Philips sold all of its television resources to the Chinese manufacturer TPV in 2011. However, Philips will gain an estimated 50 million of royalties per year from 2013 (Hagen, 2011). With such high numbers at stake researches on stakeholders’ competitive advantages are conducted and the result of a research is shown in *Figure 10: Connected TV strategies (Deloitte, 2012).*

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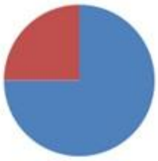
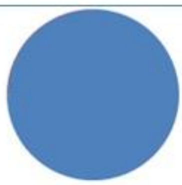
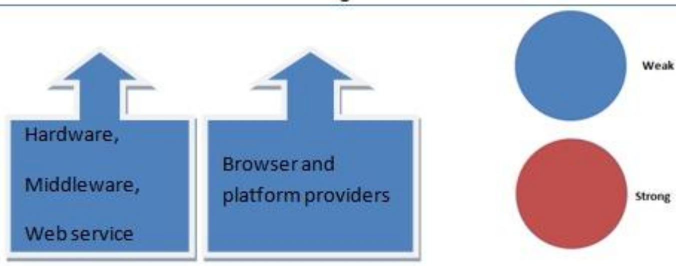
Connected TV strategies in the Netherlands			
Players	**Examples**	**Current Strategy**	**Competitive Advantage**
Content Producers	Endemol Talpa Sony Pictures Warner Home Video	1. Experiment with OTT services, managing direct customer interaction. 2. Selling and reselling online rights to new entrants. 3. Charging traditional distributors a premium for access to new devices.	
Broadcasters	NPO SBS Disney Channel RTL NL Viacom	1. Continue to mainly invest in self produced content & non-linear services. 2. participating in industry partnerships around OTT. 3. Better negotiations with distributors, (re)selling rights to new entrants. 4. Trying to develop a direct customer billing relationship.	
Cable /IPTV	Ziggo UPC KPN Canal Digitaal Tele2	1. Building OTT platforms to enable anytime, anywhere, any device access. 2. Increasingly investing in content and rights. 3. Partnering with content and tech. cos. through new revenue share models. 4. Offer services at limited added cost to increase customer lock-in.	
Device manufacturers	Sony Philips Samsung	1. Partnering with internet service providers to control user interface. 2. Developing their own platform to offer OTT services.	
New entrants	Apple TV HULU YouTube Google TV Xbox	1. Using their reach (internet or retail) to recruit a user base for services. 2. Partnering with cable companies, device makers and content owners. 3. Buying content broadcast and rebroadcast rights.	



A new entrant mentioned in *Figure 10* is Google. And this new competitor brings the following assets to the television market; hardware (Google TV), free video service (Youtube), high financial resources because it achieved a revenue of $11.53 billion (€ 8.83 billion) in global advertising by the third quarter of 2012 (Tamimi, 2012). Google is a serious competitor and one could be introduced to a new entrant that is able to change traditional power relations. The Deloitte reports strengthens the idea of traditional stakeholders working against new entrants by stating the following:

"TV content companies and broadcasters have the example of the music industry, which ceded rights to Apple only to see it take control of the value chain. However, initial evidence in the TV world confirms that broadcasters, content creators and distributors are resisting a larger role for global technology companies in their value chain by mainly withholding content rights." (Deloitte, 2012)

4. Analysis/Discussion

Seven trends are to be found in this report regarding the influence online television has on traditional television according to trends in the US and the UK. In this section the trends will be described in chronological order.

1. The US, the UK and the Netherlands have in common tending to follow the same evolutionary path in a different time slot when dealing with or creating new technologies.

For example, television was realized by first having radio, later on having sound that resulted into moving images and sound. The introduction of online streaming took place according the same process but executed in a different time slot. The time slot involved online innovations occurring in the US and after that the innovations were exported to the Netherlands or copied. However, the last few years, the Netherlands have had some successes as well, especially when exporting program formats such as the Voice. In 2013 the Netherlands is claimed to be a big player in this area and the time gap between implementing new developments decreases.

2. The definition of traditional television (offline television consumption) and new online television is in need of an update.

The Nielsen company, responsible for influencing television research in the US, redefined its definition in February 2013 and will use the new definition for upcoming reports in later 2013 (CH.3.2.). Different results could appear because consumers are now researched on current classic television behavior with use of an “alpha screen” and not on new consumer behavior. Consumers watching 30 minutes of YouTube movies after each other is perceived as spending time surfing on the computer, but when this activity would be defined as watching television content on the computer outcomes could change significantly.

3. EU subsidizing local production could be an opportunity when helping small new dynamic entrants in the television market.

New entrants are not caught up in a large classic, shareholder influenced organization and can be in a position to make real innovations as they are more flexible. No significant trends are to be found when analyzing the legal structure in the television market in the US and the EU. The EU sets priority in strengthening its market position against US content by investing in 5G networks and protecting and subsidizing European content. The US remains having a strong private character and is highly dependent on advertising incomes (CH.3.3.).

4. The portfolios of devices designed to access audio-visual content must be made easier and faster for everyone regardless place or time.

In the US and the UK organizations are ahead on the Netherlands in offering content in a different concept. One could say consumers are not that interested to use features possible on their current hardware and therefore traditional TV is still loved and sufficient. One could also interpret this consumer behavior as a sign that the current features are not consumer friendly enough. A long process takes place before one can connect it device, for example, one must either connect a TV with internet via WIFI, some sort of decoder, watch it on a desk top or use a game console and then browse for content on the "normal" web. A consumer using a connected device still gets offered the traditional content, only as a streaming service with the biggest plus being watching the content on all devices in the house, and pause and play on the consumer's own time. The traditional television market seems to pursue buyer attractiveness by adding the following innovations: new features on a smart TV, extra integration of the programs with support of a tablet or a mobile phone, and making more "exclusive content" available. A company could also make the existing TV easier in use.

5. Television should continue to enhance its social character to justify that consumers should spend more money on television instead of switching to a cheaper PC or laptop.

The great thing about television is that one can watch social events together, talk about a certain program at work or copy typical jokes, as seen on TV, in daily life. Television is leading social media conversations and enjoys most single task attention (CH.3.5. Fig. 6). However, the latter can be discussed as the activities gaming, social media, mailing and surfing are divided, even though all can be done on a single device, the computer. The fact that smart-TV sales increased significantly could be a sign of consumers wanting more internet while being loyal to the, supposed to be, consumer friendly and social TV. The latest Nielsen research underlines more demand for online content by showing that American TV households did drop due to relying on internet-delivered content in 2013 (CH. 3.5.).

6. Responding to online consumer demands with easy access content is good for advertisement quality and attracting consumers.

The experiment of Netflix with its TV show "House of Cards" proved that money can be made of "Binge Viewers". Watching multiple episodes or a complete season of a high quality show in a short time was possible when either buying or (illegal) downloading the complete season after it was aired on traditional channels. Netflix released everything at the same time for a reasonable price and this turned out to be a success, therefore Netflix is also an example of when profit can be made by making access to television content easier. The most interesting part for watching content online is that regardless the type of hardware that is used, online content is extremely measurable and is therefore more attractive for marketers.

7. The traditional television market should learn from the music market by letting go of being stuck in the 5 phases of loss and grief and embrace a new television market with new innovative entrants.

When looking at the similar music market, one can see powerful organizations spend too much time and money denying or fighting new consumer demands and ended up eliminating oneself. Instead, the companies should have invested the used resources in adapting to new consumer demands and bargain its former leadership. Similar to the music market, the current television market includes mostly traditional stakeholders with a history in gaining high profits easily, as the market has a high entry level. And when looking at the competition advantages of the companies one can see a challenging future is coming as some are valued 100% weak, 75% weak or at best, 50% strong and 50% weak. It is questionable, when all technical resources are available of meeting consumer demand with a more easy to access television device and the television business being aware of consumers wanting more integration of television and online for a fair price, why it still did not happen. In the music business new popular innovations were worked against by traditional stakeholders due to fear of losing power and money. There are no researches available on the level of old generation television content stakeholders somehow influencing the innovations of new entrants negatively as well, but the Deloitte report confirms this idea (CH. 3.7). For now, companies seem to be stuck in the denial phase with interpreting reports on new developments and popular believe of “internet taking over TV” as a myth and continue claiming the success of traditional TV as it is. And when following the 5 phases of loss and grief, businesses resisting a larger role for technology companies in the value chain by mainly withholding content rights will end up losing one’s key position in a world where there certainly is consumer demand for technology and content working together easier.

5. Conclusion:

What additional effects will the accessibility of *online* television have on the consumer behavior towards *offline* television in The Netherlands according to trends in the US and the UK?

More likely effects caused by online television content consumption on classic television consumption in the Netherlands are mainly technological potential being repressed by traditional stakeholders. Due to the restriction of technological developments the following trends occur in the near future: strengthening of the local content market by EU subsidising, new content services and platforms gaining more customers, increasing interaction between television programs and consumers by social media or the use of second screens, and meeting a small part of new consumer demand by offering enhanced online and offline combined services.

However, when looking further in the future a new definition of terminology is made and perhaps causing changes in current strategies. And if one compares the developments according trends in the music business one can see that the television business is currently in the denial phase of the loss and grief model. Meaning, executing a strategy accompanied by risk because of repressing new trends and deliberately not meeting consumer demands to its full potential.

The foundations of a business are knowing supply and demand, knowing the customer and adapt to new forces within ones external environment in order to remain unique and have justification of existents. The business essentials should go up for the television business as well. It is seen what lack of inflexibility has brought to the music business by eliminating the power of big players such as EMI. Whereas the television industry is not wasting time and money on big lawsuits, it is caught up spending time and money on researches claiming the importance of traditional TV and elaborating on successes by existing formats improving slightly.

Traditional TV remains important because of its social character and broadcasters certainly are covering a degree of consumer demands by researching them and offering improved versions of current online formats. However, after 12 years of online AV content available and researches emphasizing the importance of making access to audio-visual content easier and faster, anywhere and anytime, not responding to these long wanted consumer demands is asking for “Napster” trouble to happen. Perhaps, not in the near future one will have the resources and attitude to create high content and stand-up against traditional models, but it will happen as customer is king and technology and society keeps developing. And when it happens, the new organization is years of research and experience ahead, whereas traditional companies got stuck improving an outdated model for the sake of short-term revenues and convenience.

6. Recommendations

It would be interesting to conduct more research on conflict of interests in the television market and on the repression of new market entrants and innovations by traditional stakeholders.

In addition, it would be interesting to research the feasibility of new entrants (mainly small and dynamic) in the television market. There is a strong demand for a product that is not offered yet such as an easy to use device to watch television on and that has the benefits of both internet freedom as well as social television.

Furthermore, it can be wise to conduct more research on consumer behavior with other definitions of “Watching TV”, “Surfing”,“Social Media”,“Gaming” and “Emailing” as these categories seem to merge together.

Perhaps the result will differ if the sample survey would be with a younger audience that is not brought up with traditional TV. Most likely they will feel different on what standards an ideal medium should meet.

Even though technological developments are beneficial to society there are existing examples of traditional businesses repressing new technological development in a market. Therefore, one could doubt the results given in this report and instead research more on any possibilities to change the power that traditional businesses have in a market.

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