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## CONVERGENCE NOW?

*Some technology futurists believe that multimedia convergence will soon bring the end of television as we know it today. This researcher argues that there is no credible evidence to support that prediction. He is going to show that the current discussion about the death of TV is another variation of an enduring theme that becomes significant when advanced technologies predict to launch some revolutionary new products.*

Just a few years ago, every discussion on the future of the media included the term "electronic superhighway". Inspired by the rapid advances of computer technologies and the equally impressive increases in PC penetration, this catch phrase described the path to a digital world in which computers dominate and have replaced the established media. Today, "electronic superhighway" sounds oddly old-fashioned and the term has been replaced by a new, equally ubiquitous one: "convergence".

It appears that the new slogan represents a small shift in the view of the multimedia future. Hi-tech philosophers, such as Negroponte, saw only computers at the end of the electronic superhighway. They regarded the other media as inferior to the computer – with regard to technological features, applications, in every regard. However, as most of us have noticed that even computer-enthusiasts and internet-surfers still find uses for papers and magazines and have not sold their TV's and radios, a more moderate view seems to be gaining acceptance among technology futurists: the "old" media will converge with the computer. This means, for example, that television will not simply disappear. It will survive, because it will be enhanced by computer functions.

### New slogans – old debates

Predictions about the death of established media have accompanied the introduction of every successful medium (and even of a few unsuccessful ones) in this century. During much of the 50's and 60's, television was widely believed to be Hollywood's arch enemy. Many thought cable TV, pay TV, and VCRs would have killed the networks before the end of the 80's. When reality proves such predictions wrong, they usually are quickly forgotten, and one moves on to analyze how the old media are adapting and how people use the various media. Clearly, the current discussion is a variation on this enduring theme.

There is, however, something new in the current debate, which makes it more compelling than many of the predictions of the past: The new multimedia technologies enable the creation of a variety of converged media products and companies from different industry sectors are already working together to bring about convergence of computers and TV sets. Thus, while early "electronic superhighway"

predictions had much less to do with science than with fiction, the current "convergence" discussions are neither philosophical debates nor science fiction fantasies.

### Convergence of technologies, companies, and consumer behavior

The term "convergence" is most frequently used in connection with computers and television. Three aspects – which are interdependent but separate – are usually considered: (1) technological innovations which enable the convergence of different appliances and their functions; (2) cooperation among companies from different sectors or expansion of companies into hitherto unrelated industries; (3) changes in consumer behavior, specifically, the adoption of interactive television usage patterns which are similar to internet-surfing. Let's take a closer look at these three aspects:

**Technology convergence.** Despite initial problems, the new technologies that allow the convergence between TVs and PCs have been developed. Prototypes of appliances which incorporate these technologies have already been shown at trade shows and are expected in the stores before Christmas 1998. Whether these appliances will be primarily television sets with computer functions (TVPCs), or more like computers which TV reception facilities (PCTVs) is not clear yet; it will depend on consumer reaction.

**Industry convergence.** Microsoft's purchase of WebTV, MSNBC, and the collaboration between computer and cable companies to create faster internet connections are evidence of business strategies which are building bridges between the worlds of the computer and media industries. This kind of convergence is moving forward, albeit at a slower pace than some have predicted. About five years ago, it seemed that phone companies were about to become major television players who would pave the interactive TV lane on the electronic superhighway. That did not happen. Also, the interests of the different industries are frequently at odds. For example, the technical convergence of PC's and TV's could have happened sooner, if the consumer electronics and computer industries had been able to agree on a standard.

**Consumer behavior convergence.** The third meaning of “convergence” is the most important. Consumer preferences have a decisive influence on the manner in which the technology options are applied to consumer products and, they indirectly impact how companies will and will not work together. Therefore, an analysis of the factors which will determine the nature and the extent of convergence in consumer behavior is an essential part of any attempt to predict the development of the media.

### From couch potato to “converged” viewer?

With respect to consumer behavior, “convergence” generally means that consumers are expected to quickly adopt the new convergence products and that the now predominant “passive” television viewing behavior will be replaced by more interactive behavior patterns. Rarely will we be watching television as we used to – as “couch potatoes”. Most of the time, we will take advantage of the added options provided by multimedia technologies – from calling up additional information on news reports, to multi-tasking (such as doing work and watching a football game at the same time).

Some advocates of the “convergence now!”- theory argue that current empirical data cannot really help us predict changes in consumer behavior. (If we were talking about 20 years from now, I would agree with that.) Others, however, point to empirical evidence which they believe supports those predictions. For example, they cite surveys reporting that about a third of computer users says their TV use had declined since they bought a TV and that many parents say their children prefer the computer over the TV. To really understand and to predict accurately how consumer behavior might change, one should not only look at early adopter surveys. We have to look at all the research and all the consumer segments; we have to understand the new, but also the traditional media. A critical evaluation of all the evidence does not support predictions of imminent changes among America’s TV viewers, but points to a slower – and more differentiated – evolution of media usage patterns.

### What the research evidence tells us

There is an abundance of research data on use of the new media and of television: Arbitron Pathfinder, FIND/SVP’s studies, Media Metrix, Nielsen Media Research, Odyssey Research, Yankelovich Cybercitizen, and many others. My review of all the evidence, including internal NBC studies that explored the reasons why people watch and why they use the internet, leads to three key conclusions:

1. Most PC and internet user ascribe different functions to the PC and the TV: The PC is primarily an information tool, the TV is primarily for entertainment and relaxation. Information, entertainment, and relaxation

are different, enduring needs – they don’t automatically converge because technology is converging.

2. Many of the survey data on the new media are contradicted by more reliable metered data. Those data indicate that most PC users have not significantly reduced their TV viewing and that young people have not abandoned TV.
3. General statements about the entire population are not particularly useful in this field – averages hide significant differences in usage and attitudes. This is and will be a very segmented market. The data suggest that there will be convergence in TV and PC usage among some segments, some of the time, with and without the new converged appliances.

### Different media – different functions

Regarding the first point, there is rather widespread agreement about the different functions of the PC and the TV at this time, which are reflected in the way these appliances are used as well as how they are perceived by consumers. However, there is less agreement on the inferences to be drawn from this with regard to the future of television viewing. In my opinion, the relaxing entertainment function of “old-fashioned” TV viewing is very rewarding for most people and will endure. It is true that watching a movie or a sitcom is a “passive” experience compared to PC-interactivity. But, generally, if you like the movie or the sitcom, it is an experience that cannot really be enhanced by interactivity. (HDTV, better sound, etc., are more likely to improve such an experience.) Having said that, it is important to point out that there are TV uses which sometimes lend themselves to interactive enhancements: news, sports, and also commercials. But most people like entertainment and don’t always want to interact with sports and news. Advocates of PC-like TV’s often ignore the role of entertainment and place too much emphasis on news and information uses of the TV.

### What reliable data say

Regarding the second point: I am constantly amazed how often self-reported survey data about PC usage are accepted uncritically and how much more reliable meter-based data are ignored. Since we know that most people (not just early adopters) regard computers as important and useful, and since we also know that many people feel a bit guilty about watching a lot of television, shouldn’t we be a little bit skeptical when people tell us they are spending hours and hours doing important stuff on the computer, watch less TV than ever, and have computer-savvy two year olds? So, what do reliable data tell us about people’s actual behavior?

The best usage data available at this time come from the 10,000 PC household panel of Media Metrix. Total PC

usage is about 25 hours per month (October 1997) and has not increased during the last twelve months since new buyers use the PC less than early adopters. Internet usage, however, is increasing steadily; it is now over 6 hours per month. And how about usage by children? They may use computers at school, but only teens are busy playing PC games and surfing the web at home; half of children in PC homes don't use it at all.

Do PC owners still watch TV? Nielsen Media Research can now supply television ratings for homes with and without computers. The first time ever, these data were computed for the month of October 1997. The result: Prime time usage in PC homes was at 59%; in homes without PC's it was 60%. (This means during the average minute, 59% or 60% of the sets were on. Monthly TV use by adults who have PC's in their home is close to 100 hours per month. AOL use can be compared to the rating of a medium sized cable channel, a fraction of the ratings of any of the four big networks.) During the day, PC homes watch less TV than those without PCs, but it appears that employment status is the driving factor here. (PC owners are more likely to be employed; these data do not control for socio-demographic differences between PC and non-PC homes.) Finally, the web-surfing children who do not watch TV are the exception (they're our kids); nearly all children and teens (other people's kids) watch more TV than use the PC at home.

### **A segmented market**

Finally, regarding the third point, the Media Metrix web ratings, and other data as well, reveal that average numbers are not particularly useful. There is a segment of frequent web users, for example, but it is not growing as much as the group of infrequent users. There is also a large group of people who have no interest in the new media and, contrary to many predictions, that segment is shrinking slower than the icebergs in Antarctica. (One technology prophet was recently quoted as saying that PC penetration "should be" well over 60% now – essentially chiding Americans for not living up to his unrealistic forecast.)

In short, all the data point to a segmented market that is changing, but will remain segmented. This suggests that there will be fans of new multimedia appliances, and there will be convergence in TV and PC usage. But is unlucky to become a dominant pattern. In addition, the existing data indicate that another kind of new media usage may be evolving – which is less a "convergence" than a TV-PC "interaction".

In an article in the *Journal of Advertising Research* (March/April 1997), Coffey and Stipp show data indicating that many PC owners have a TV and a PC in the same room and that they use them sometimes simultaneously, sometimes they go back and forth. The data also demonstrate how TV promotion drives web traffic. In fact, many of the most successful websites are by media companies who use traditional media to promote these sites and, in that way, achieve their goal of serving their audience in the "old" and new medium. One could argue that such connections would work even better, if new appliances can make "seamless" transitions. However, consumer data indicate that many people are looking for simpler, cheaper PCs and bigger TV sets. As a result, converged multimedia appliances may not become as widespread some people assume. (TV/VCR combinations never took off.)

If these analyses are correct, there won't be a convergence-revolution in consumer behavior any time soon. It will be a rather slow, evolutionary process. For quite some time, it could well be that interactions between the two media on separate appliances may become the predominant "convergence" pattern – among the half of Americans who have PCs at home. But even for them, as for Americans without PCs, "convergence" will only mean new appliances and new companies, but not a new way to relax and be entertained.

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