

RUSHING INTO NEW MARKETS - TV ONLINE SERVICES IN BRAZIL: THE CASE OF REDE GLOBO

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ABSTRACT

Rede Globo, the largest television network in Brazil, offers a number of TV online services. They are an important application of Information Technology aimed at a broad public. After a cultural overview, the paper uses a framework based on the interdependencies between the audience shares and advertising income, critical success factors as well as a classification of TV online services, to analyze some examples of individual offerings. This is followed by a look at the economic and strategic impact of these services. Preliminary conclusions are drawn concerning their strategic potential and future importance for television networks.

1. RESEARCH OBJECTIVE AND RELEVANCE

Web-based TV online services are offerings by networks which use the Internet as a carrier medium to give viewers added-value by supplying them with information and services in addition to the traditional scope of TV network products. They can be distinguished by the direction of the information flow as shown in figure 1.

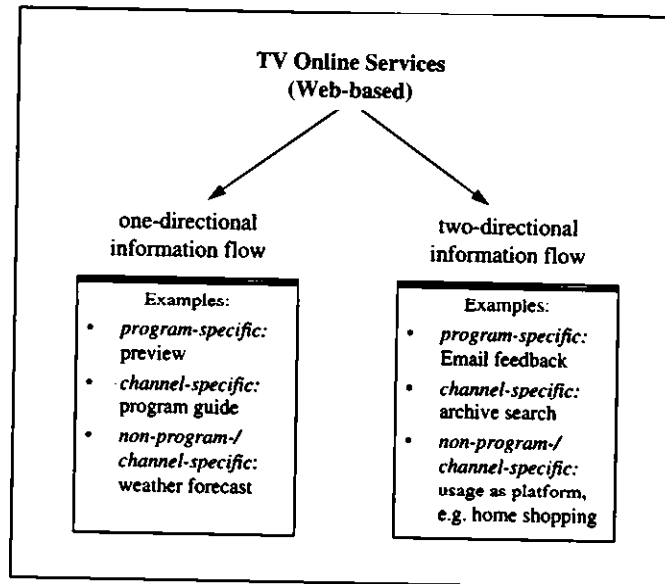


Figure 1. Web-based TV online services

Online services may contribute to a TV network's revenue in four ways: firstly, the Web can be used to enhance the efficiency of internal and external communications and related processes. Secondly, online services can increase the sales or prices of products (effectiveness), mainly the price of advertising by increasing the share of viewership. Thirdly, advertising space offered on the pages can represent an additional source of income and lastly, consumers pay directly for specific online services which thus turn into stand-alone products (Loebbecke, Butzbach 1996; Loebbecke, Powell 1997).

Increasingly, TV stations are introducing TV online services, as they seem to hold economic potential and open new markets. Nevertheless, networks have apparently until now been neglecting a careful evaluation of online services' strategic and economic potentials, which ultimately is a prerequisite to develop these markets and thus to profit from them.

Objective of this paper is to analyze some exemplary TV online services offered by the Brazilian Globo TV network as well as to assess their strategic potential and their economic benefit.

2. OVERVIEW: BRAZIL AND THE BRAZILIAN TELECOMMUNICATIONS AND TELEVISION INDUSTRY

2.1 Demographic and economic particularities of Brazil

Brazil is the fifth largest country by area in the world and the only state in South America where Portuguese is spoken. There is a very sharp division in

society between the rich and the poor. Only about 60% of the 162.6 million population dispose of any buying power beyond their most basic needs. A concentration of economic wealth lies along the coast, especially in the southern part (Economist 1995, Baratta 1996, CIA 1997).

Brazil is the world's eighth largest economy with an estimated GDP at purchasing power parity of 976.8 billion US\$ in 1995 (CIA 1997). Until 1990, Brazil was a relatively closed economy, but then adopted an aggressive liberalization strategy which immensely increased the competitiveness of most sectors. Efforts were made to privatize state-owned monopolies. This led to dramatic changes in technology, especially telecommunications (Economist 1995, KPMG 1996, UN 1996, BNDES 1997).

Brazil has a very young demographic structure. Table 1 shows the estimate for July 1996; life expectancy at birth is 61.62 years (CIA 1997). A high degree of illiteracy is still a major problem with only an estimated 83.3% (1995) of the population at age 15 and over being able to read (CIA 1997).

Table 1. Age structure in Brazil (estimate for July 1996)

Age	Share of population
0-14 years	31%
15-64 years	65%
65 years and over	4%

2.2 Brazilian telecommunications and television industry

Brazil's telecommunications industry is controlled by formerly state-owned companies that have just recently been privatized. In the 1980's, most of the necessary investments were not carried through as the capital was used by the government to pay for the nation's debt instead of developing and maintaining the telecommunications infrastructure. As a consequence, the provision of telephone lines is a severe problem today (Economist 1995, Pinhanez 1995, Gouvea Neto 1997). Nevertheless, the existing telephone net is in a good state. In 1994, there were an estimated 8.1 lines per 100 inhabitants compared to, for instance, 60.2 per 100 inhabitants in the U.S. (UN 1996).

Brazil is a country with a strong television tradition (Torres and Fontes 1995) and one of the highest daily per-capita television consumptions worldwide. Daily TV viewership in Brazil's economic centers (São Paulo and Rio de Janeiro) in 1996 was 420 minutes (Paoletti 1996) compared to 241 minutes in the U.S., 251 minutes in Japan and 196 minutes in Europe (Baldauf 1996). There are 112 television broadcasting stations (CIA 1997) and an estimated 82% of Brazilian households had television (corresponding to 32.65 million television sets) as per December 1993 (Paoletti 1996, UN 1996). There are currently around 4 million personal computers installed (Santos 1996, Marins 1996b).

As there is no public financing, television industry is mainly financed by revenues from advertising (Wilke 1992). The estimated number of Internet users in Brazil was at 600,000 for November 1996 (Godoy 1996). The average net user pays roughly \$30 per month for the basic service. This limits Internet usage to persons with a fair amount of buying power (Marins 1996a). The Brazilian telephone company EMBRATEL currently operates the largest Internet backbone in Latin America which connects more than 80 major locations in all parts of the country.

3. THEORETICAL FRAMEWORK FOR THE ANALYSIS OF TV ONLINE SERVICES

Private TV stations depend upon advertising income as their main source of revenue. *Loebbecke and Trilling (1997)* suggest that the strategic potential of TV online services is currently closely linked to the additional advertising income they generate. They develop a framework which considers a variety of ways for TV stations to improve their economic performance by offering online services and to critically assess the benefits of these services.

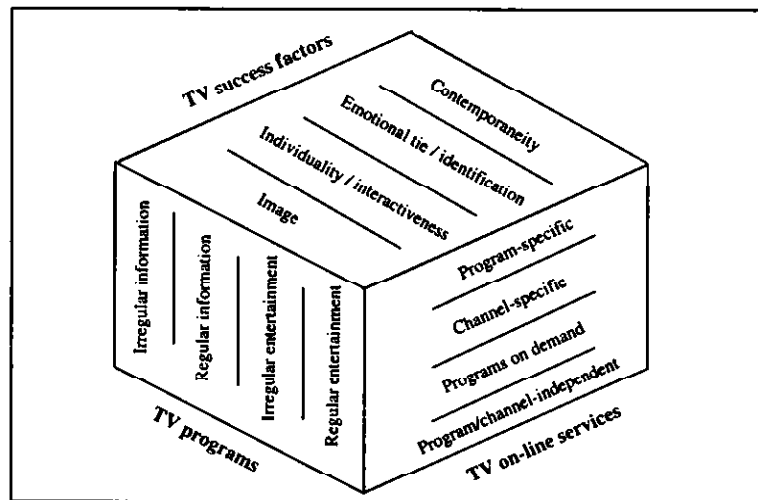


Figure 2. Online success per program typology (OSPT)
(Loebbecke, Trilling 1997)

At its core, an 'online success per program typology' (OSPT) integrates programs, success factors and online services to provide a basis for detailed investigation and comparison of the online offering. This typology is derived from an interdependency analysis of *audience share* and *program-specific advertising income*, *hits on Web pages* and *program-specific advertising income* as well as *hits and Internet-specific advertising income*. There is an

obvious link between audience share and program-specific advertising, as the price of advertising time is determined by the number of viewers. Web-based online services that can attract additional viewers on the one hand, and television programs which encourage viewers to make use of online-services on the other, are connected reciprocally or even complementarily. Lastly, the price of an advertisement placed on a Web page is linked to the number of hits, as they are usually used as an indicator for the reach of the advertisement (Loebbecke, Powell 1997).

The four identified success factors *contemporaneity*, *emotional tie*, *individuality/interactiveness* and *image* are used to analyze the causes for the level of viewership. *Contemporaneity* is especially important for information programs and mainly depends on up-to-dateness of information and its availability to viewers. The *emotional tie* encompasses the viewer identification and the ability of the network, program or actor to influence him; it is a form of viewer commitment. This is a vital element for regular programs such as news or soap operas and can be based on content or people. *Individuality and interactiveness*, as a function of customer integration, are important for the perceived quality of services. The authors also describe the degree of customization and viewer interaction. The factor *image* is of significance for the competitiveness of the network and for the success of a particular program.

The importance of these success factors for different types of programs is then assessed along the lines of a proposed classification of TV online services. Two dimensions are distinguished in this classification (see table 2): (a) supportive vs. stand-alone and (b) channel, program or independent as unit of interest.

**Table 2. Classification TV online services
(Loebbecke, Trilling 1997)**

Unit-covered	Supportive services	Stand-alone services
Program	Program-specific online services	Programs-on-demand
Channel	Channel-specific, but program-independent online services	
Program-and channel-independent		Program- and channel-independent online services

4. REDE GLOBO'S ONLINE SERVICES

4.1 Company overview

Rede Globo is the television network of the Globo media giant, a company of great domestic influence and importance in Brazil (Wilke 1992, Gouvea Neto

1997). The conglomerate also holds print media, record labels (to commercialize Globo's soap opera soundtracks) and radio stations. In the last decades, it has been following an aggressive national and international expansion strategy. As a consequence, Globo TV has turned into a global player in a sophisticated and fast-moving high-technology sector which is becoming increasingly competitive. Being the fourth largest private television network in the world and one of the largest in-house producers of television programs, Globo TV is highly involved in the globalization of television and program distribution (Große-Kracht 1992, Netz 1996, Paoletti 1996, Gouvea Neto 1997, Rede Globo 1997). Globo is currently trying to position itself as the technology leader in the Brazilian and Latin American television markets, preparing to exploit new potential markets, products and services (Netz 1996, Salamanca 1996, Paoletti 1996, Gouvea Neto 1997, Rede Globo 1997).

The Globo television network started in 1965 in Rio de Janeiro. Unlike its competitors, Rede Globo had a national focus from the start. Thus it is not surprising that innovations such as the first live and color broadcasts, satellite transmissions and nation-wide programs were all introduced by Rede Globo. (Große-Kracht 1992, Gouvea Neto 1997, Rede Globo 1997). Rede Globo's audience share in Brazil is approximately as follows:

**Table 3. Rede Globo audience shares
(Gouvea Neto 1997, Rede Globo 1997)**

Time of Day	Share of Total Viewers
Morning	56%
Afternoon	59%
Evening (prime-time)	74%
Late-night	69%

Rede Globo has been following a strategy of technology leadership, launching new products and introducing new technology at a high pace and with a long-term approach. An emphasis lies on state-of-the-art equipment. This led to an environment which quickly adopted new developments and technologies (Herz 1987, Große-Kracht 1992, Wilke 1992, Gouvea Neto 1997, Rede Globo 1997). Almost all of Brazil (99.84%) is covered by the Rede Globo television network with 107 broadcasting and affiliate stations. In 1995, the network introduced a new digital satellite distribution system replacing microwave and land-line systems in the state of São Paulo. As a consequence of the national approach, it has traditionally had the biggest market share of Brazil's advertising budgets for television (65%) as shown in figure 3.

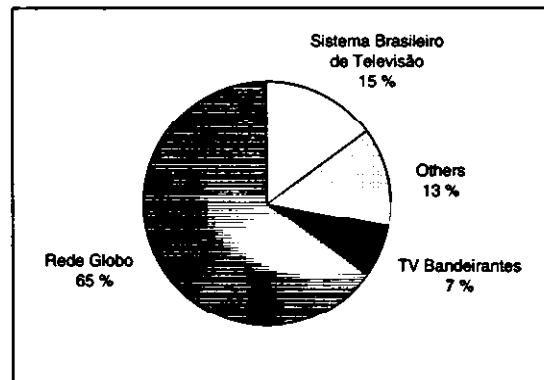


Figure 3. Network market shares in television advertising (Gouvea Neto 1997)

Rede Globo is pursuing a number of joint ventures. Four of the largest communications companies (News Corp., Grupo Televisa of Mexico, Tele-Communications Inc., Rede Globo) have joined efforts to offer direct-to-home satellite service. This will bring up to 150 channels to Latin America. Rede Globo also founded a very successful Pay-TV subsidiary, Globosat (Gouvea Neto 1997).

Globo TV offers 21 hours of program a day (around the clock on weekends). Virtually all the programs (soap operas, mini-series, specials, shows, comedy hours, musical events and news) are designed and produced in-house at its own studios, thus allowing a high degree of customization to the characteristics of its audience. The selling of these in-house productions all over the world is an additional source of income which incurs almost no extra cost. (Große-Kracht 1992, Gouvea Neto 1997, Rede Globo 1997).

4.2 Rede Globo's online services

Rede Globo's Web-based online services (<http://www.redeglobo.com.br>) started in 1996. They are frames-based with an emphasis on graphic-intensive visual presentation. A text-only or no-frames version does not exist. As of November 1, 1997, there are no commercial or non-Globo advertisements. A navigation bar at the top of the page remains visible at all internal links. This bar offers the possibility to return to the front page, go to the television program schedule, to a search function (not operational yet), to a program guide site, to e-mail contacts, to a company information and sales page as well as to a page containing news from the recording studios. The design of the individual pages differs widely, except for the navigation bar.

Television program schedule

On this page, the daily television program times are shown. Some of the programs offer hyperlinks to the individual home page of that program. There is

the possibility to retrieve the schedule for the remaining days of the week and for the following week.

Additional information on programs

This is a platform to access the content offered by the individual programs, such as science and news programs, telenovelas, etc. Telenovelas are modern television soap-operas that are based on the traditional Brazilian serial publication known as 'folhetim' (similar to chapter-by-chapter novels in newspapers): romances divided into episodes. They usually run for one season and once viewership drops they are terminated (Vink 1988; Wilke 1992; Rede Globo 1997). For instance, for these soaps the TV online services provide an introduction to the story, the plot, information about the author and the director as well as a presentation of the production team, the cast and the technical staff. Besides Portuguese, some of the pages also offer the content that does not change on a daily basis, in English and Spanish. Most of the pages also allow for feedback via a dedicated e-mail-address hyperlink.

E-mail contact

This page allows viewers to contact the makers of the most popular programs via e-mail by clicking on icons with the program-specific logos, letting them recognize their program visually rather than in text form.

Company information and sales

By choosing this link, interested parties can obtain company information (in Portuguese, English and Spanish) as well as information on in-house productions currently for sale (in English and Spanish). Besides the plots of the production, the names and full addresses of the sales representatives are supplied. Also available is information on merchandising possibilities for telenovelas.

News from the recording sets

Behind this link, the viewer can obtain the latest news from the recording sets. This includes information on what is currently being recorded, small and big problems at the studios, updates on stories and gossip about the actors.

5. ANALYSIS OF SELECTED REDE GLOBO ONLINE SERVICES ACCORDING TO THE PROPOSED FRAMEWORK

5.1 Success factor importance per product category

In the following analysis of examples from the Rede Globo online services, the classification of TV online services as shown in table 2 will be used. The importance of the introduced success factors is assessed for each of the three

categories. Program- and channel-independent online services are disregarded, as none are offered by Rede Globo.

Program-specific online services

The majority of the offered online services are program-specific. Examples for this are 'Jornal Nacional' (daily news program), 'Por Amor' (telenovela) and 'Angélica' (children's program with a live audience of elementary school-aged children) pages.

Contemporaneity is an important success factor for the 'Jornal Nacional'. The online offerings include discussions and background information on a selected number of subjects treated in the TV edition, but there is no separate and comprehensive online edition. It has less importance for 'Por Amor' and 'Angélica'.

Emotional tie and viewer identification are vital for 'Por Amor' and 'Angélica'. 'Por Amor' needs an emotionally involved audience to keep its share of viewership which determines the amount and price of advertising. A drop in viewership may even make it necessary to start a new soap. The 'Angélica' page tries to bind its young audience by offering them additional activities, pictures, music, video clips and a contest to increase the level of involvement. For 'Jornal Nacional', this aspect has less importance.

Individuality and interactiveness are important for 'Por Amor' and 'Angélica', less for 'Jornal Nacional', as viewers have no influence on the happenings that constitute the news. 'Por Amor' is, as any soap, permanently in progress and each episode is written just ahead of recording. As the story develops and becomes more concrete, Rede Globo has to keep track of audience profiles, checking on their expectations to let the story run in that direction. The viewers become virtual co-writers of the soap-operas they watch and thus their personal preferences can be taken into account. Consequently, the interaction with them is vital for the program's success. This is achieved by offering the possibility to read previews of the episodes just ahead and to give e-mail feedback on the development. The 'Angélica' pages encourage kids to send their opinion on the program or to engage in other activities (see above), and of course their actions are monitored to allow a development of the TV program along the latest trends.

Finally, *image* is a very important success factor for the online services of all of the three programs, but the conveyed image has to be different. Whereas 'Por Amor' must be up-to-date on social concerns and public opinion, 'Angélica' must be trendy and innovative. 'Jornal Nacional', on the contrary, should convey an image of a reliable and trustworthy supplier of information.

Channel-specific, but program-independent online services

Examples for channel-specific, but program-independent online services are 'Programação' (TV program guide) and 'Institucional' (company information) pages.

Of course, *contemporaneity* is of vital importance to the 'Programação' TV program guide. Viewers expect to see the valid version of the programming. Thus, any sudden changes in the schedule must be posted in this online service without delay. For the 'Institucional' company information pages, this is less important, as the history and development of the company can't change, only - and rarely - its perception.

Emotional tie and viewer identification as well as *individuality and interactiveness* have little importance for the 'Programação' and the 'Institucional' online services.

Lastly, *image* is the dominating factor for the 'Institucional' pages. These pages are used for public relations purposes and convey a positive, non-controversial view of the network. For 'Programação', image can only have a negative effect, if the program guide gives wrong information. Its potential to convey a positive image is very limited.

Programs-on-demand

No programs on demand are currently offered except for short clips on the 'Angélica' page which cannot really be considered as such.

To summarize, as shown in figure 4, program-specific contemporaneity and individuality and interactiveness are of lesser importance. Also less important are channel-specific emotional tie and viewer identification, as well as image. Channel-specific contemporaneity, on the other hand, seems to be of more importance.

Success factors \ Online Services	Program-specific	Channel-specific
	Contemporaneity	++
Emotional tie and viewer identification	+++	O
Indivituality and interactiveness	++	+
Image	+++	++

+++ high impact ++ high / modest impact + modest impact O no impact

Figure 4. Impact of TV online services on TV success (after Loebbecke, Trilling 1997)

5.2 Assessment of the strategic and economic impacts of Rede Globo's TV online services

Rede Globo's technology leader approach makes it a strategic necessity to pursue any promising new technologies, at least in the perception of the public. If TV online services turn into a competitive necessity or if new markets open, Rede Globo needs to have the new technologies up and running. The current offering of online services allows the testing of reliability and the gaining of experience with a still limited user base. Due to the novelty of the services, a comprehensive cost-benefit-analysis is not yet possible.

According to Globo TV, there is no direct return (direct additional revenues or savings) from its online services yet. Indirect revenue from online services-based marketing and a more positive image cannot be estimated but seem to be rather limited due to the fact, that the number of Internet users in Brazil is still very small. Thus online services can only have a slight influence on increasing the number of viewers and in turn raising advertisement prices (Antunes 1997).

The assessment of the additional cost created through online services is only slightly easier. One time costs to set-up were around 250,000 US\$ and minimum yearly maintenance costs are 50,000 US\$ (maintenance costs are an own estimate based on the necessary manpower of two full-time positions for current online services offering). The set-up includes procured hardware and software as well as installation and training costs (Antunes 1997).

5.3 Planned expansion of Red Globo's TV online services

Rede Globo is planning to expand its online services to increase the benefits created. Online services are to be used to lower the cost of interaction. For example, instead of reading, processing, printing and mailing replies to viewer letters, e-mails will be processed and suggestions for replies made automatically before being sent via the Internet. This will not only save the postage and handling, but also reduce human processing time to a minimum. The Internet will then substitute part of the amount of telephone calls on toll free lines (Antunes 1997). According to own calculations, the *current* economic potential is a savings of up to 1.6% of total cost of toll-free telephone lines. Thus, the contribution to corporate revenues will be mostly derived from enhanced efficiency.

The offering of additional information will be enlarged in the near future and is being implemented for breaking news headlines and Brazilian economic news. Rede Globo already uses its pages to supply company information and present its efforts in charity and welfare programs. These online services are to be enlarged and it is planned to add links to charity programs encouraging viewers to (possibly online) support them (Antunes 1997).

Also, the usage of online services is planned to be more closely monitored to establish individual viewer profiles for certain social segments or age groups.

A good example for the possibility of gathering quantitative data is the 'Angélica' page. A doll of the children's program presenter 'Angélica' can be dressed by the young viewers online from a selection of clothes. Besides being a fun activity, the information will be gathered and used to dress 'Angélica' according to the preferences of her viewers. The information will also be used for advertising purposes and trend research, as this social segment is the main addressee of non-basic consumer goods (Antunes 1997).

6. LESSONS LEARNT AND OUTLOOK

As outlined in section 5.2., Rede Globo is not yet generating any direct additional income through its online services. The current number of Internet users in Brazil is still too small in comparison to the total number of TV program viewers. Rede Globo tries to support a rapid expansion of Internet-usage by specifically addressing young viewers as target group. Those young viewers have a higher degree of flexibility in using new technologies and are more willing to follow new trends (Ali, Marinho 1995). This makes the young a more promising new market. Investments in online services can thus only be seen as a further step in slowly developing this new potential and in conveying a technology leader image. In addition to such relevant external factors, there are also company-specific (internal) factors which must be considered.

The introduced framework was used to analyze Rede Globo's TV online services. In the case of Globo it seems likely that online services were implemented without a clear idea of the objectives pursued. Apparently only a trend was followed - the question of 'why?' remains open. Even though the offered online services are constantly increasing in proficiency and user utility, they do not seem to be generating any additional income for the network yet, nor do they seem to actually be developing new markets and potentials. As in this case, there are often no precise figures on the cost of the necessary investments available. Apparently, no serious investment plan was set up and no minimum expected return on investment defined. The (seemingly) low cost of online activities is regarded as a sufficient justification.

In general, the two decisive questions for TV stations considering the launch of TV online services should thus be: (1) is a positive return on investment to be expected? and (2) are TV online services a competitive necessity for the stations core business? If at least one of these questions can be affirmed, we would recommend the set-up of online services. Otherwise, TV stations should at first refrain from doing so.

What developments can be expected in the near future? The globalization tendency is a factor that will foster the development of TV online services. TV stations will be able to reach out to new viewers via the Web without investing in transmission technology such as satellites. This will open the door to a more global advertising market, but will also increase competition. Improvements in the infrastructure will lead to a higher interest in programs-on-demand via the Internet. High income households can be expected to increasingly obtain

Internet access in the future, as the telecommunications infrastructure is being created. It can be concluded from the current boom in Pay-TV demand in Brazil (the growth rate of Pay TV in Brazil was 212% between 1992 and 1996 and generated revenues of more than 1 billion US\$ in 1996), that online services such as programs-on-demand have a particular potential in a country with a high degree of street violence. Web-based online services will probably follow this trend, but due to the high up-front cost for users (investments in PC or Web computer, telephone line, Internet provider, etc.) the development will be much slower. Thus, TV online services are also likely to favor, like digital TV, a further segmentation of viewers. This will in turn make commercial advertising directed at these segments more effective. If any real additional profits can be derived from these developments in the long term, remains to be seen.

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