



Introducing Three Dimensions of Audience Fragmentation

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Presentación de las Tres Dimensiones
de la Fragmentación de la Audiencia

Apresentação das Três Dimensões
da Fragmentação da Audiência

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Abstract

Audience fragmentation has become a recurrent theoretical framework in the early 21st Century, used mainly to depict the new complex and dynamic relationships established between media and consumers. However, some academic studies have been published which expand on the meanings and implications of the so-called fragmentation from the perspective of the audience. This paper is based on empirical research undertaken in Colombia among young people (17-24 year-olds) who live in the ten most important urban areas of this country located at the north-west corner of South America. A mixed methodology was used, combining quantitative and qualitative methods with a statistical sample. Conclusions support a theoretical proposal based on what the authors call the three dimensions of audiences' fragmentation—intramedia, intermedia, and transmedia fragmentation—as a way to understand the new relationships established between media content producers and active and participative consumers, beyond the media-centrism paradigm and closer to the revival of encoding/decoding communication process.

Keywords: media; audiences; practices; fragmentation; reception

Resumen

La fragmentación de la audiencia se ha tornado en un marco teórico recurrente en la primera parte del siglo XXI cuyo uso principal ha sido el de representar las nuevas relaciones complejas y dinámicas que se establecen entre los medios de comunicación y los consumidores. Sin embargo, se han publicado algunos estudios académicos que amplían desde la perspectiva de la audiencia los significados e implicaciones de la llamada fragmentación. Este artículo se basa en una investigación empírica realizada en Colombia entre jóvenes (17-24 años) que viven en las diez áreas urbanas más importantes de este país, ubicado en la esquina noroeste de América del Sur. Se utilizó una metodología mixta, combinando métodos cuantitativos y cualitativos con una muestra estadística. Las conclusiones corroboran una propuesta teórica basada en lo que los autores llaman las tres dimensiones de la fragmentación de la audiencia (fragmentación intramedio, inter-medio y transmedio) como una forma de entender las nuevas relaciones establecidas entre los productores de contenidos en los medios y los consumidores activos y participativos, más allá del paradigma del centrismo mediático y más cercano al avivamiento del proceso de comunicación de codificación/decodificación.

Palabras clave: medios; audiencias; prácticas; fragmentación; recepción

Resumo

A fragmentação da audiência tem virado para um quadro teórico recorrente na primeira parte do século XXI cujo uso principal foi representar as novas relações complexas e dinâmicas estabelecidas entre os meios de comunicação e os consumidores. No entanto, estudos acadêmicos desde a perspectiva da audiência que ampliam os significados e implicações da chamada de fragmentação já foram publicados. Este artigo é baseado em pesquisa empírica realizada na Colômbia entre jovens (17-24 anos) que moram nas dez áreas urbanas mais importantes desse país, localizado no canto noroeste de América do Sul. Uma metodologia misturada foi utilizada, a combinar métodos quantitativos e qualitativos com amostra estatística. As conclusões corroboram uma proposta teórica baseada no que os autores chamam de as três dimensões da fragmentação da audiência (fragmentação intramédio, inter-médio e trânsito) como forma de compreender as novas relações estabelecidas entre produtores de conteúdos nos meios e os consumidores ativos e participativos, mais para além do paradigma do centrismo mediático e mais perto do avivamento do processo de comunicação de codificação/decodificação

Palavras-chave: meios; audiências; práticas; fragmentação; recepção

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Introduction: the new multimedia audience marketplace

The first decade of the 21st century changed the way the media economy was consolidated during the previous century. A digital boom that started with the commercial introduction of the Internet brought a relevant multimedia transformation. It was characterized mainly by mergers between traditional and new media companies, the opening of new global media markets, the launch of new personal digital assistant devices, the production of new digital content, as well as a new media consumption culture (Albarran, 2010).

All this transformation occurred in only two decades, and led to a new configuration in terms of audiences' responses, behaviors, and attitudes. Even consolidated media such as radio or television started to explore new outlets for content distribution and exhibition, thanks to the boom of digital and convergent communication. Audio-visual content has migrated to cell phones, video consoles, and personal digital assistant devices (PDAs), transforming former passive audiences into active players and actors in the media value chain (Arango-Forero & González-Bernal, 2011).

A whole body of academic studies was developed around the audience as a subject of analysis and research since the early previous century. Klaus Jensen & Karl Rosengreen (1990)

distinguish five traditions that explore the nexus between media and audiences: effects research, uses and gratifications research, literary criticism, cultural studies, and reception analysis.

The approaches in the area have been many and diverse, drawing on a number of disciplines in the humanities and the social sciences. Even in cases where obvious similarities may be found between different traditions, their representatives have not always seemed to be aware of each other's existence (Jensen & Rosengreen, 1990, p. 208).

This paper is not aimed at developing a detailed analysis on the research traditions about media and audiences. But instead, it focuses on the changes that took place during the late 20th century, the implications of which drove scholars and researchers to skip the traditional paradigm that assumed the existence of a mass audience determined and oriented by the media as a whole.

On this new theoretical framework shift there is a transition from the mass audience concept to the interactive media user (Livingstone, 1998, 2003); from the traditional segmentation of audiences to fragmentation (Webster, 2005), polarization (Sunstein, 2000), even the erosion of

audiences (Turow, 2010). As Denis McQuail (1997) remarks, “The media have increasing difficulty in identifying and retaining ‘their’ particular audience . . . Patterns of media use will simply be a part of varied and changing lifestyle” (McQuail, 1997 p. 23).

Audience fragmentation has been used as a theoretical framework able to depict the new complex and dynamic relationships established between media and consumers. However, some studies have focused more closely on the meanings and implications of fragmentation in accordance to the creation of a theoretical framework from the perspective of the audience. This article, based on empirical research undertaken in Colombia among young people (17-24 years-old), aims at supporting a theoretical proposal based on what the authors call the three dimensions of audiences’ fragmentation: intramedia, intermedia and transmedia fragmentation. Thus, the last part of the article is to be understood, not as a direct result of the empirical study, but as theoretical proposal that may serve to support further studies that deal with audience fragmentation.

Theoretical approach: audiences and fragmentation

The way to study audiences in the new media environment is through a particular focus, with a deeper understanding about how these social constructions of media audiences change over time, how technological and institutional forces may affect such change, and how changes are negotiated and resisted by stakeholders involved in attracting and monetizing media audiences from an economical perspective (Napoli, 2011, p. 3).

The definition of an audience that assimilates its relationship with the so-called new media and the media market could be the one described by Philip Napoli (2011) as the “*institutionalized audience*”. From an economical and managerial point of view, the audience can be defined as socially constructed by media industries, advertisers, and associated audience measurement firms. However, an audience is not only conceptually created but also manufactured by the actors involved in the media market as an article of trade to sustain the advertising business model (Arango-Forero, & Roncallo-Dow, 2013).

The new challenge for the established marketplace, however, is that audiences currently do not behave passively. Quite the opposite, they are able and willing to react to the external changes. Thus, it becomes relevant to question whether and

how this marketplace has been determined by the technological developments that have led to new media. The main shift in the new dynamics of the audience structure can be summarized by the two concepts presented by Napoli (2011): audience fragmentation and autonomy.

As a result of new technological implementations, the proliferation of digital wireless communication channels is spreading yesterday's mass media, ever thinner, over hundreds of narrowcast cable and radio channels, thousands of specialized magazines, and millions of computer terminals, video-game consoles, personal digital assistants (PDAs), and cell-phone screens (Bianco, 2004; De Fina, 2016; Pérez-Lattre, 2014).

Similarly to what occurs with interactivity and user generated content, fragmentation is not a trend that comes about exclusively with new media. It arose with the broadening of traditional media contents into subscription television, thematic radio stations, and the exponential increase of specialized print magazines, among other developments. However, the rate at which new media have enabled the increase of outlets has meant a significant shift in the traditional producer-media-audience paradigm.

The most obvious cause of fragmentation is a steady growth in the number of media outlets and products competing for public attention. This happens when established media, like television, expand or when newer media, like the Internet, enter the competition (Webster & Ksiazek, 2012, p. 4).

There have been two main streams of outlet growth: the first is the use of new technologies by the traditional media as part of the multi-platform convergence that is inherent to technological development; the second is new contents and platforms that have come to existence following the development of new media incorporating interactivity, convergence, and user generated content, such as social media platforms. Several social networking services caught the attention of interactive audiences, due to the ability and capacity to cre-

ate entirely new social infrastructures by their networked users (Lindqvist, Bjorn-Andersen, Kaldalóns, Krokan, & Persson, 2008, p. 18).

Altogether, the technological aspects and characteristics of the new media that have altered the patterns of the media landscape regarding audiences can be put together under a second concept: autonomy. As of now, the control over media consumption has shifted from the producers to the consumers themselves, for it is they who decide how, when, where, and what to consume. "Now they also have the power to decide over the content they consume, how it will unfold, and the possibility to manipulate it or to generate their own outcomes, being more demanding of the media than ever before" (Arango-Forero, & Roncallo-Dow, 2013, p. 640).

New media technologies, that empower audiences to take control and enjoy increased choice over when, where, and how they consume media, are transforming the relationship between audiences and media. At the same time, new technologies for measuring and monitoring audience behavior are revealing previously unknown aspects of how and why audiences consume media (García-Canclini, 2008; Napoli, 2008; Rincón, 2008).

Despite some evident advantages for active audiences and multitasking media users under the veneer of fragmentation, some authors have taken a critical position about the new fragmented media environment, mainly in the case of news consumption. From a sociological perspective, some critics argue that fragmentation drives audiences to consume mainly specific topics of information, with individual and personal interests rather than social concerns, "thereby potentially leading the vast majority of the public to be underinformed about vital issues facing the country and the global community" (Paradise, 2009, p. 877).

This critical approach arises as a result of thematic specialization of media content and its individualized use, that "seems to be fast displacing national comings together, and pleasure seems to be pushing public affairs even more out of sight" (Katz, 1996, p. 25).

In the case of online news, some authors criticize the way information is customized to a very fragmented portion of the population, creating a limited scope of sources of information and polarizing audiences, who become less likely to find solid arguments and information to support their political and social positions (Sunstein, 2001).

Despite the different points of view that are displayed about the consequences and meanings of audiences' fragmentation, what seems undisputable is the transition from a mass to a mediated communication environment, as well as the transitions from a massive to a customized consumption of media that occurs in the new century (Chaffee, & Metzger, 2001).

Rethinking audiences' fragmentation: a proposal beyond the numbers

Numbers and statistics about the fragmented media markets are insufficient to explain the current environment, in which audiences establish a particular relationship with the so-called new media, in the broad sense described above. The perspective proposed here is linked to the need of rethinking audiences and the new media environment from a more nuanced dimension, and as a structuring condition of the human status, rather than a merely technological phenomenon. That is why when today we talk about mass media, we have to remember, following Marshall McLuhan, that this expression does not refer to the size of the audience, but to the fact that everyone is involved in them at the same time (Roncallo-Dow, 2014).

From the perspective of the users and their uses, we propose a vision of the subject which oversteps the more traditional idea of decoding, and turns to the problem of cultural practice in order to understand what it means to think about the audiences and their relationship with new media technologies today.

The perspective of decoding¹ proposes a subject inserted in a specific area, a subject with a cultural memory: a subject of preconceptions and particularities. These features provide an array of competences

that determine the hermeneutic condition of the subject. This is, undoubtedly, a perspective of analysis that is quite interesting insofar as it recognizes the subject in its uniqueness, and opens up the possibility of establishing a dialogue with the media text, the meaning of which is constructed in a process of continuous negotiation and insertion of the messages within the assumptions that are raised by everyday life (Martín-Barbero, 1998, p. 220; Roncallo-Dow, 2011, p. 73; Arango-Forero & Roncallo-Dow, 2013, p. 641).

From the perspective of decoding, media plays an instrumental role. Being in front of a decoding subject, the creation of meaning is performed, strictly speaking, by the receiver. There is a strongly autonomous position that suggests the non-interference of media in the search and construction of sense and meaning. It is clear that, despite the free and optimistic vision of the individual, the point of view of decoding establishes a split between media and culture—to be understood here as a way of life—, because it suggests the existence of two poles which, apparently, coexist independently of one another.

However, from the perspective of decoding, there is awareness of the cultural memory and of the receiver as a subject, and it is necessary to go beyond the medium-message-subject relation and to propose the scheme in new terms: subject-subject-media-message-subject-subject. This second perspective leaves aside media centrism, and focuses much more on the relationship that exists between subjects that are mediated, *inter alia*, by media texts.

Understanding the new media communication in developing environments does not mean to undertake only a theoretical and practical analysis of media. In Latin America, Jesús Martín-Barbero, one of the promoters of the mediations of the theoretical framework, makes this point very clear. In his conversation with Martha Elena Montoya, Martín-Barbero states that “there is no doubt that if the media are the sole objective of studying communication, it is very difficult for us to think about the authors, subjects, and processes” (Montoya, 1992, p. 24).

From a contemporary perspective, this idea may appear initially as problematic, as independence between sender and receiver seems to have been exceeded. Both are elements of a communicative process that presents itself as a whole, since there is an active and simultaneous activity of its components. There is, however, an obstacle here. When talking about decoding in an instrumental perspective we think, by definition, of a medium (sender) that presents a text (message) and sends it towards a reader-decoder (receiver): communication here is limited to the analysis in terms of media and sets aside a number of factors that play a leading role in the process of decoding the text.

It is from the practices, i.e., *from the what is (going to be) done with the media messages*, that meaning sees the light. This suggests that there is not a hegemonic and unique reading. The meaning is not given as a metaphysical entity. We are not talking about the idea of a unique meaning that has to be found by the reader on the receiving end matching one-to-one. The meaning, as the practice, is variable.

From this perspective, the vision of the problem of reception turns out to be very attractive because it opens the door to a concept of a free subject, who autonomously uses reason and his cultural environment to fill the signs that he perceives with meaning. This semiotic process, subject-led, of everyday life, allows for an understanding of the reception and interpretation in more interesting terms. Paraphrasing Jesús Martín-Barbero, the object—proper of the media-centrist conception— gets lost in order to shed light on the process, the what and the how that are immersed in everyday life. Martín-Barbero argues that even though everyday life sometimes is taken as insignificant from a perspective that focuses on the logics of production, it is clear that it opens the way to new stories, to new visions of the social spectrum (Martín-Barbero, 1998, p. 93).

The abandonment of media-centrism does not represent an abandonment of media. Instead, we propose a (re) conception of media from a new

perspective that goes beyond the instrumentality and the typical conceptions of post-Marxism and structural functionalism according to which media are instruments of power and domination, mainly in developing societies. What arises here is that media are part of an apparatus of power and are aimed to defend a certain dominant ideology. Media are considered to be part of an ideological arena where different perspectives of class compete, but within the context of the domain of certain classes (Curran & Gurevitch, 1977, cited by Curran, 1998, p. 385).

But, from the perspective of cultural practices, it is clear that media are presented as much more than power devices: they are builders of social and cultural meaning. They provide an account of the world that is a world on its own right, of the reality that they build, and that, at the same time, builds them. David Morley's reflection concerning the family and their television consumption could be placed on this path. A critical position against media as objects that are consumed is presented here, and certain rules about the how and the why of cultural consumption within society are evident, taking as an unit of measurement the family and the various modes of interaction within the given with media, in this case, television (Morley, 1992, p. 113).

Audiences' fragmentation in developing economies: the Colombian case

The new dynamic and complex relationship between media and audiences depicted above has been broadly demonstrated in developed and mature media markets, like those in the United States, Western Europe, even the Far East. But what has been happening in the so-called developing media economies? Are we in with the new but, at the same time, not so far from the old?

This is the theoretical framework that during the last seven years has inspired the research about audiences' behaviors and consumption habits, and responses at the Media Observer (*Observatorio de Medios*), a research group affiliated to the Faculty of Communication at La Sabana University in

Colombia. Our inquiries have focused mainly on children, adolescents, and youths who represent more evidently the new configuration of habits for audiovisual consumption under the veneer of fragmentation (Arango-Forero & González Bernal, 2011).

This article is aimed to answer two key research questions:

Q1. What are the main characteristics of the so-called new audiences regarding audiovisual consumption, mainly among young people between 17 and 24 years old, who live in the ten most important urban areas in Colombia?

Q2. What kind of theoretical approach to the concept of audience fragmentation can be obtained from an empirical research based on young audiences' behaviors, attitudes, and responses?

This paper will focus on answering these questions based on three main topics:

- In terms of audiovisual consumption habits and content preferences
- In terms of traditional and new media technological consumption
- In terms of content responses and active participation by audiences

The methodological approach of our research

Despite the complex dynamics of today's social relationships, and of each individual's relationship with media and communication devices, it is necessary to find answers in research studies through the application of scientific methods that afford an empirical approach to formulate conceptualizations about social reality.

We have applied mixed research methods, combining both quantitative and qualitative techniques, which allow for contrasting statistical results and reflections provided by the agents of the phenomenon under analysis. The apparent opposition between qualitative and quantitative research constitutes a misconception. The age-old dichotomy between numbers and words, or that between accurate and vague data, appears

to have been rendered irrelevant today. As stated by David Silverman (2000), qualitative data may help to complete quantitative voids and vice versa, especially in the field of social science research. It all depends on the goal set by the research project. The final purpose of all research ultimately transcends methodologies, and they have to become means and instruments to enable the construction of useful theoretical proposals and conceptual grounds (Strauss & Corbin, 2002).

Once the parameters of analysis have been defined, to attain validation of the most relevant quantitative data in our study, we then need to corroborate those results with the information gathered through a qualitative technique, namely focus groups, aiming at finding a qualitative interpretation of the statistical results.

The focus group technique has been validated—especially in the field of social sciences—as a practical tool for gathering data based on the information on one topic provided by people, or on a series of specific topics (Onwuegbuzie, Dickinson, Leech, & Zoran, 2011). The final findings will allow us to infer ourselves on the mixed system; that is to say, metainferences (Hernández Sampieri, Fernández Collado, & Baptista Lucio, 2010).

Applied methodology: techniques and methods used

We have already seen the most relevant aspects that allow for an understanding of audiences' fragmentation. With the same intention, we have geared the design of both the quantitative (survey) and the qualitative (focus group) instruments in order to gather first-hand information that enables us to establish the most relevant aspects of an audience-fragmentation relationship in the Colombian context.

Based on the Colombian National Statistics Department most recent official demographic survey, the population predicted for the ten most important urban areas in Colombia by 2010, was 1.178.998 male and 1.154.414 females between 17 and 24 years old (DANE, 2007). We calculated a

statistical sample size of 1.071 inquiries (representing 0.5 % of the total population) at a 95 % confidence level, and with a confidence interval of 3 %. The sample also presented a balanced distribution among age groups, as seen below in the Table 1:

Age	Frequency	Share
17	137	13 %
18	135	13 %
19	135	13 %
20	134	12 %
21	135	12 %
22	131	12 %
23	131	12 %
24	133	12 %
Total	1.071	100 %

Source: own work

The sample distribution was also evenly distributed based on the population size by city according as follows in Table 2:

No	City	Inquiries	Share
1	Bogotá	463	43 %
2	Medellín	146	14 %
3	Cali	144	13 %
4	Barranquilla	80	7 %
5	Cartagena	64	6 %
6	Cúcuta	45	4 %
7	Bucaramanga	33	3 %
8	Pereira	32	3 %
9	Ibagué	32	3 %
10	Santa Marta	32	3 %
		1.071	100 %

Source: own work

As stated above, survey and focus group questions were divided in three main categories. Inquiries about audiovisual consumption habits and content preferences; inquiries about traditional and new media technological consumption, and inquiries in terms of content responses and active participation by audiences.

Survey results were analyzed by descriptive

statistics, paying attention first to the measurement of frequencies and the percentile weighting of these frequencies, in relation to the size of the analyzed sample. In some cases, the findings are represented by obvious majorities that make certain trends evident; however, in others the findings are characterized precisely by the multivariate answers. Multiple group categories ultimately are the ones that validate findings related to the fragmentation phenomenon.

To bring light to the latter aspect, we have applied a multivariate cluster analysis system by means of a non-hierarchical method known as the nearest neighbor (Johnson, 2000, p. 234).

With regards to the qualitative study, in order to systemize the results of the ten focus groups, we have applied the method developed by A.M Huberman and Mathew Miles, who propose three interlinked sub-processes: 1. Reduce data (selection and condensation of data under subtopics or subcategories); 2. Present data (representation of condensed data in charts or diagrams that stand as conclusions); 3. Draw and verify conclusions (interpretation of data presented and final drawing of their meaning). For Huberman and Miles, the cluster of analytical categories obtained from the qualitative results interpretation can be derived or explored either deductively or inductively, both forms being perfectly valid and potentially useful (Huberman & Miles, 1994, as quoted by Coffey & Atkinson, 2003, p. 9).

In the construction of the analysis instrument that contributed to the discovery of the most relevant conclusions obtained from focus groups, we grouped up data by categories in terms of properties and dimensions, in accordance with the categorization of data obtained from the quantitative study.

Applying the methodology proposed by Strauss and Corbin, these categories were in turn distributed in subcategories, from which a sensible variable overlap could be elicited (by means of the axial coding procedure²). These overlaps allowed for the synthesizing of answers obtained from the ten focus groups and enabled their transformation

into findings (by using the selective coding process³), providing the basis for the conceptual conclusions.

Each one of the focus groups had between nine and twelve participants. As stated by Martha Ann Carey, data pertaining the individual's perceptions and opinions are strengthened by the interaction taken place within the focus group, since individual participation (reflection) can be improved in the group setting. In the end, the gathering of experiences and beliefs, both personal and collective, tends to justify the purpose of a focus group (Carey, 2003, pp. 263-264).

In each of the ten focus groups, held between June and September of 2011, there were representatives of both genders, with ages ranging between 17 and 24 and coming from different socio-economical backgrounds (strata), who lived permanently in the city where the focus group was carried out and could be singled out in one or more of these demographics: student, employee, unemployed.

Such heterogeneity in the composition of groups allowed for the beefing up of outcome possibilities and the obtaining of general conclusions before private opinions that might represent the reality of one only group of people identifiable by one demographic or psychographic characteristic (Morgan, 1998).

All the focus group sessions were video recorded once the participants had agreed to it and signed a waiver. The recording enabled us to assess non-verbal cues and behaviors, which helped to analyze the compliance, acceptance, and rejection of some interventions or comments during the activity.

Key findings

Detailed data about consumption habits confirm the penetration of different telecommunication services among young people who live in the main urban areas of Colombia. It shows that 99 % of people surveyed have at least 'triple play' (Internet, pay TV and fixed telephony), fixed or mobile Internet, cell phone, or another telecommunication service.

Qualitative data show how being connected to the world and the sense of social inclusion are the most common gratifications that the young can find. Most people, who cannot afford a contract with a telecommunication provider, attend alternative services in public places, such as the so-called 'Internet cafes'. Individuals also identify a kind of social inclusion and personal recognition by using this kind of digital services.

Despite considerable digital communication penetration, the urban youth are still active regular television watchers (4.4 hours per day weekly and 6.1 hours per day on weekends). Participants interviewed on focus groups confirmed watching television for companionship or social inclusion and recognition to be their main reasons for tuning in. In both quantitative and qualitative data, international programming included on the pay television system plays an important role for them—for instance, 65 % of the participants prefer to watch the international television offer rather than national productions—with thematic and demographic content as an aggregate value.

In contrast, Colombian television (mainly soap operas—*telenovelas*—, adapted series and realities) offers a variety of cultural and national proximity according to the multivariate cluster analysis: family tradition, cultural approach, current social issues, influenced by peers commenting stories, even the critical consumption of national stereotyped stories are different reasons that Colombian young have for consuming domestic television.

Young people in Colombian urban areas watch audiovisual content far away from regular television. Up to 90% watch videos or TV content on the Internet regularly; 71 % of respondents receive videos through Internet, most of which are shared through social media networks, where Colombians are very active—96% of those surveyed have at least one active account—; 68 % of the people surveyed download videos from the Internet while 46 % send and/or share audiovisual content mainly through social media networks.

Smartphones and tablets have become also important audiovisual content providers for young Colombians: 40 % of respondents share pictures, music, and/or videos using this portable technology.

Qualitative data show how young people enjoy watching videos that become popular, mainly on social networks. Sharing videos and user-generated content on the Internet represents an important kind of gratification. Respondents obtain personal and social recognition when they produce, broadcast, and/or share videos, mainly for fun and entertainment purposes.

The study confirms a multitasking user profile: 83 % of respondents consume at least two or more media at the same time. For instance, 75 % of respondents combine Internet with other media and 70 % watch television while consuming other type of content. Results obtained from focus groups show how a multitasking profile seems to be pretty normal among those interviewed. In most of cases, simultaneous consumption of media takes place thoughtlessly. However, active audiences know what, where, how, and why they combine different types of content in order to satisfy specific uses and gratifications.

Last, but not least, youths were asked to rank their most important audiovisual media platforms: Internet is the most important (49 %), followed by smartphones (26 %), television (20 %), radio (3 %), and motion pictures (2 %).

Preliminary conclusions

As stated above, only a few empirical studies have focused on the meanings and implications of the so-called audience fragmentation. The beginning of the 21st century has presented a revolutionary process in the mediated communication environment. The power of the well-established media system during the former century has been challenged, and in some cases replaced, by the power of the audiences, that not only have become more important but even more active and participative in the communication process. The communication space that used to be controlled and set by

media companies in the past nowadays is increasingly controlled by audiences, users, consumers, even producers and prosumers. As Picard (2010, p. 369) states, it has changed from a supply-driven to a demand-driven media market.

Measuring audiences as a commodity is everyday more challenging for media industries. Empirical evidence in our research shows that the classic and traditional concept of audience must be reinterpreted and replaced, in most of cases, by specific individuals who establish particular and personal relationships with media content. In some instances audiences behave as mere consumers, but in some others respond as users, publics, clients, even producers and broadcasters of content, giving sense to the three dimensions of audience fragmentation explained above. In most cases, the audience-hood mostly has a concrete personal angle far from previous conceptualizations of the audience as a mass, as a market, as a lifestyle, or other discursive constructions as stated by Birgitta Höijer (1999, p. 180).

We also agree with Philip Napoli (2012) in the sense that audiences' fragmentation and autonomy represent the end of massive audiences on a massive communication environment, not only as an ontological concept but as well as a paradigmatic model that inspired the commercial and institutional roots of mediated communication in the 20th century.

Measuring, but mainly understanding and knowing audiences, constitutes a key challenge for both the media industry and the academic field. Probably this common need will integrate both the academic and industrial traditions in search of the audience, mainly in the Latin American communication environment.

Identifying new typologies of audiences, throughout the three dimensions of fragmentation introduced, will allow both media managers and scholars to advance in the recognition of different behavioral patterns, attitudes, uses, gratifications, and responses provided by the members of active audiences at the beginning of a new century communication era. That could be an interesting topic for further research.

Empirical evidence obtained allow us to support Virginia Nightingale's statement (1999) in the sense that the massive audience constitutes only an imaginary category, created as a concept that helps to deal with a growing number of unknown people who are potential consumers of one or several media. Thus, audiences' fragmentation, from a theoretical framework, helps us to intentionally separate individuals from the mass, in order to categorize them as a specific group of people, who become subjects of analysis with clear goals and purposes.

Also, the empirical evidence supports the theoretical developments presented by Luciano Elizalde (1998, p. 10), which state that inquiries about the consumption habits of a specific medium are insufficient to understand the current relationship established between media and audiences. In the case of young people, their use of personal assistant devices (PDAs) such as laptops or cell phones becomes relevant to understand the connection and interaction with the communicative world they are living in today.

A final point: introducing three dimensions of audience's fragmentation as a possible new theoretical framework

Based on empirical evidence and audience's fragmentation as a theoretical framework, we can now enrich the concept, based on the so-called three dimensions of fragmentation: intra, inter, and trans-media fragmentation.

a. Intramedia fragmentation

When we talk about intramedia fragmentation, we want to imply the manner in which the media's ever more specialized content supply force users to make far more selective decisions at the moment of consumption. As Napoli says, "intramedia fragmentation refers to the expansion of a medium's ability to deliver multiple content options" (2003, p. 136). Therefore, the way in which this intramedia fragmentation takes place is through the need of the audience to make decisions which, albeit within the

media itself as platform, are increasingly refined and heed the trends of a media supply that prioritizes consumption hyper-specialization. Thus, intramedia fragmentation has to do with an audience behavior that is modified by an abundant semiotic universe delivered by media, and poses new criteria for the selection of symbolic material. In other words, consumption is determined by the greater possibilities within reach of a growing audience, more demanding at the moment of making their decisions of consumption. Whereas this high degree of selectiveness implies considering an active audience, intramedia fragmentation constitutes the most passive of the three dimensions put forward in this paper, since audience involvement is at the behest of the —wide and specialized— media supply.

Content digitalization, as well as sophisticated developments for distribution and exhibition, has provoked an oversupply during the new century. In the case of audiovisual industries, instead of a few TV channels or radio networks located in specific geographical regions, it is pretty common to find today a huge hybrid market that combines local, regional, national, and international windows that compete for the user's attention. That is the first dimension of audience's fragmentation, the one that forces the consumer to become an active one in order to select what he/she really wants and expects. As Robert Picard (2005) states, the oversupply consequently fragments the audience.

Intramedia fragmentation is currently inspiring new decisions made by advertisers, who need to target audiences identified with specific content. Intramedia fragmentation will break the rating hegemony and will force media companies to generate programming strategies aimed to target specific niches of audiences. For example, even the open content TV networks, such as the Colombian Caracol and RCN, are nowadays conquering specific segments of audiences throughout entertainment formats such as soap operas (*telenovelas*), or reality shows (mainly on prime time) understanding that this kind of content allows them to keep their audience engagement (Arango-Forero, 2013; González-Bernal, 2016).

The next challenge for the open commercial networks, from the intramedia fragmentation perspective, will be the launch of the Digital Terrestrial Television (DTT) system, which will increase the oversupply and will promote the thematic and targeted frequencies. Analogue switch-off in the Colombian free television system will take place by 2019.

b. Intermedia fragmentation

Intermedia fragmentation deals with the possibilities of the audience to broaden their consumption into simultaneous multiple media or platforms. This is a particularly interesting point in the current media ecosystem inasmuch as it suggests unification of several types of consumption at a given moment by means of one or more devices. It is not just the high degree of selectiveness mentioned when we discussed intramedia fragmentation that comes into play here. In this dimension of fragmentation one can think of an audience that, when choosing a type of consumption that transcends a single platform, looks for diverse kinds of gratification in the different semiotic universes that are visited. A fitting example to contemplate this is the simultaneous consumption of Twitter and television. Although both may be harbored over a single device (be it a Smart TV or a tablet), they engender in the user diverse sorts of gratification which translate into a type of consumption that portrays the radical changes taking place in the current media environment. What becomes apparent is a higher level of participation than that pointed out in the previous dimension, inasmuch as the wide and diversified array of gratifications hint at an audience that, consumption-wise, turns out to be more complex and becomes an audience that moves in several semiotic universes searching for particular elements in every single one of them. Beyond what traditionally could be perceived as a “plain” multitasking profile in the audiences, what becomes evident here is the increasing complexity in the way that the consumers’ semiotic machineries move in the contemporary semiotic environment (Ortega, González Ispuerto, & Pérez Peláez, 2015).

Seeking the audience is not the business of a specific media industry. There was a time when the medium was industrially defined by its characteristics for producing, packing, distributing, and exhibiting content and from a particular way of consumption. There was a time during the day for reading the newspaper, for listening to the radio, or watching television. There was a time for the radio receiver, or for the TV set (Piscitelli, 1998).

Media convergence in the current century drove audiences to instant and simultaneous consumption through multifunctional devices. Therefore, the traditional distinctions between media industries tend to disappear. Today there is no single moment and circumstance for specific media consumption. It might be the moment of the audience, which inspires the second dimension of the intermedia fragmentation.

We validate Robert Picard’s statement about the increase of speed, flexibility, and integration of already existing ways of communication hailed by this century’s information revolution. That is the real consequence of the media convergence process from the media industry perspective. “The digitalization, new media and information and communication technologies are part of an evolutionary rather than revolutionary change in communication ability. No real new communication ability is being created” (Picard, 2003, p. 154).

However, we cannot ignore the communication system created from the 2.0 worlds; the Internet system founded on social networks and consolidated two years after Picard’s claim. We cannot find a clear frontier between the so-called traditional media and the new media either. Nowadays, we can identify new ways of distribution and exhibition of preexisting content, therefore new ways of accessing the traditional media content: text, pictures, sound, and/or video. The ones who claim that the Internet is a new medium should admit that, instead of a new medium, the Internet is really a meta medium, or a big media integrator, a new technological platform that integrates traditional ways of media content distribution and exhibition.

From the consumer's point of view, one single device grants the user access to digital newspapers, radio stations, TV channels, social networks, or e-mail, among other functions. On the intermedia fragmentation dimension, each medium competes for the user's attention. In response, the audiences, mainly the so-called digital natives, pay attention to more than a single content at once, becoming multitasking and active consumers.

At the same time, media corporations have increased their content exhibition windows. The goal is to become available in all types of audience consumption, but also keeping the original platform. A newspaper is still printed and distributed; radio and TV are still broadcast throughout traditional frequencies, but all of them are also contained on the Internet, the big platform able to integrate all kind of media content until now.

c. Transmedia fragmentation

This third dimension of fragmentation is perhaps the one that implies the greatest complexity, not only at the moment of considering the kind of semiotic universes that audiences populate but also their productive capability. When we talk about transmedia fragmentation, what we are dealing with is, then, the necessity to conceive an audience that not only painstakingly chooses what they consume and diversify their levels of gratification, but also generates their own content. In the current media environment these possibilities are more evident than ever before thanks to the options average consumers have at their disposal. For instance, software that allows for the reinvention of existent content, via remixes and mashups, or its re-signification, for example, through machinimas. The user-generated content (UGC) concept evolves to a point in which, given the specificity of the current environment, it is presented as something never seen before⁴. The audience has the ability to sidestep the schedules or listings imposed by media, dodge ads, and come up with alternative endings. All in all, the audience has at hand the chance to be the broadcaster and fracture the way in which the communication

diagram was used in the 20th century.

By the end of the first decade of the 21st century, the most significant change, on the so-called new technologies of communication, relies on the control over the communication process itself, the one that has relocated the audience in the center.

Never before had the audience played a key role on content selection and control. Moreover, never before had the audience created their own communication system, established schedules, and consumption habits of their own, beyond—institutionalized—media control.

That is the kind of finding that inspires the third dimension of audience fragmentation, namely transmedia fragmentation. A given content originally created by the print, radio, television or the motion pictures industry is now consumed according to the user's terms and conditions, as William Uricchio states: “the digital turn has accelerated the challenges to the ontological distinctions amongst established media, offering both new definitional conceits and new media forms with wide-ranging implications for traditional media” (Uricchio, 2009, p. 25).

Young people, subjects of this research, do not distinguish clear content access barriers when they are determined to consume. Asked about their consumption habits on regular TV, for instance, they aggregate the kind of content consumed on Internet with no platform distinctions in their regular schedule. What is really important to them is the type of content they want to consume, no matter how, where, or when.

We support Robert Picard's statement in the sense that in a digital media environment, consumer's needs must be a fundamental aspect of media corporations' strategies: “One must be able to answer questions such as: what will they get, they aren't getting now? How is the technology or service relevant to their lives? How does it improve life or help them? Why is it valuable for them? Why should they use and pay for the new service?” (Picard, 2003, p. 154).

Notwithstanding, transmedia fragmentation is not only a matter of audiences selecting

platforms, it also implies the ability to modify the nature and purposes of the content provided by media.

Television series, radio programs, films, video clips, even advertisement spots that used to be broadcasted according to the dynamics established by the media markets, nowadays are rerun, remade, reused, and repurposed by active audiences thanks to the Internet, the great media container. This is the most evident expression of the transmedia fragmentation, whose consequences for the traditional media industries business model are still a matter of research.

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Notes

1. Stuart Hall (1980) introduced the idea of encoding / decoding to indicate the way in which the appropriation of the messages was determined by a circuit that involved the production, circulation, distribution, consumption, and reproduction; he called a "complex structure in dominance".
2. For Strauss and Corbin the axial coding consists, at first, in the relationship between the established categories and the subcategories in order to find more accurate explanations and interpretations of the phenomena under study.
3. In selective coding, as seen by Strauss and Corbin, the data interpreted, refined, and grouped in subcategories foster a theory construction process. "The statements that portray relationships, such as concepts, are drawn as data abstractions" (Strauss, & Corbin, 2002, p. 159).
4. A good example to consider this is the meme. It makes its appearance as an Internet genre, as an evolution of the initial mimetics to move into being the more complex possibility of copy and replica of images. And this step taken by the meme has allowed it to take over discussion forums on the Internet in a major way overtaking complete conversations on the web. But its expansion encompasses not only the fixed image, but it also has reached the moving image. Three of the main meme consultation websites, 9gag, 4chan, and Reddit, contemplate in their meme the apparition of animated GIFs or short videos that are mostly produced with a humorous purpose or subjected to remixing. Many of them are imitations of other images in popular culture as are the memes themselves. These short videos are often shows their faithful audiences look forward to. In the case of the meme website 9gag, they were allotted a space to configure as a Tv On Demand option in the domain 9gagtv.com.

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