



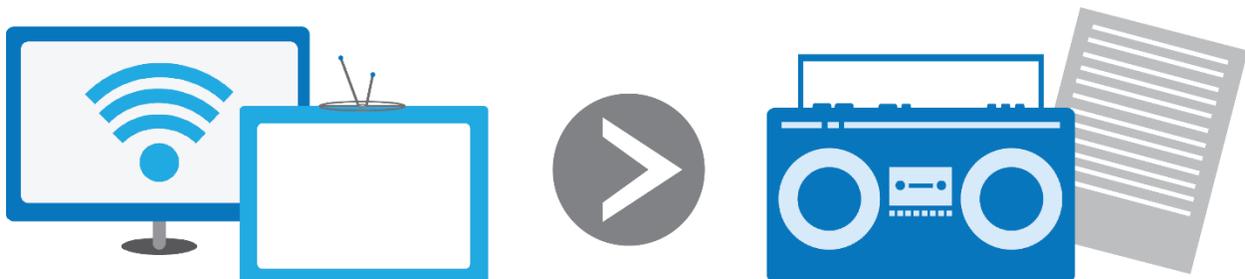
Are Smart Phones and the Internet Changing How Colombians Interact?

D3 Systems recently conducted a series of focus groups with men and women in the departments of Meta and Tolima to gather insights on how Colombians access information, what media they use, their preferences for various kinds of content, and their perceptions of media credibility. The rise in smart phone use and a belief among many of the participants that the Internet is less controlled than other media suggest the number of opportunities to reach Colombians and influence consumer preferences, social beliefs, and political attitudes is increasing. Some of the findings of the groups include:

- TV and Internet are the media used most often by both men and women in both departments regardless of age group or socio-economic status.
- Listening to the radio and reading print media trails far behind TV viewing and Internet use.
- Smart phones are the preferred device for accessing the Internet and engaging with various social network platforms.
- The Internet empowers Colombians to seek out different perspectives on information, encouraging more thoughtful criticism and review of consumer information and editorial content from major traditional media outlets.

There is a palpable sense that the Internet and its accessibility through smart phones is driving Colombians to be more critical of the information they receive from traditional news outlets and to seek opportunities to compare information from a broader variety of media, including crowd-sourced information such as Twitter. Mobile devices are increasing access to information and connecting Colombians in new ways, and, at least for now, are viewed as an expansion of their personal freedom, unfettered by censorship or control by others. The technology is described by the Colombians in the focus groups as deeply personal and as a kind of repository of the private lives of the users. The opportunities to engage Colombian audiences are increasing, and along with them the ability to have influence on their attitudes and behaviors.

Preferred Media Formats



TV and the Internet are used most often by all participants.

"If I don't have Internet, I feel lost." [Male, age 18-24]

"I use [my mobile] so much my fingers are tired...every minute and every second." [Female, age 35-54]

Television is the preferred form of traditional media but the Internet is equally, if not more, popular because it is not only a source of news and information but also a means of communicating with friends and family. Cell phones offer constant, mobile access to the Internet along with a variety of Internet-based applications and social media networks in addition to SMS text and phone calls. Their popularity is growing and adoption of the various applications they make available continues to proliferate rapidly across both gender and age groups.

Radio and print media (magazines, newspapers) are seen as media preferred by the older population.

"My family never had the habit of buying newspapers. I look for them online, I don't have the need to buy a newspaper." [Female, age 18-24]

"Newspapers and radio are our parent's and grandparent's favorite." [Female, age 18-24]

Participants talk about radio and print as media belonging to their mothers' and grandmothers' generation. Radio is still appealing for music, but that is also increasingly available through smart phones. Some participants were quite pessimistic about the potential of newspapers, noting that they were more attractive to an older generation interested in the crossword puzzles found inside.

The Internet

Internet use, social networks and smartphones are inextricably linked.

"I use [the internet] everyday, 24/7" [Female, age 25-34]

"It is easier to have access to it anywhere and anytime, mostly through cellphones; you have 24 hour access to the Internet; also you can find anything that you are looking for. [It's] because of the social networks." [Female, age 18-24]

"The only thing you cannot find on the Internet is happiness or love...and even that depends..." [Male, age 25-34]

All but one participant has a smartphone that provides mobile internet access. Participants use their smartphones for access to various media – social networks first and foremost - as well as to watch videos, listen to radio, and view the websites of traditional media outlets such as TV stations and newspapers.



Mobile Phones

Cellphones provide constant access to information and social networks.

Participants use their cellphones for a long list of personal and professional activities and with the exception of only one person across all the group discussions, all the participants were able to access the Internet on their phones. Making person-to-person calls is a small fraction of the way Colombians use their phones. The free cross-platform mobile messaging application WhatsApp is very popular as is Facebook. Cell phones are used to make updates to social networks, Instagram, Pinterest, send and receive emails, visit newspaper websites, play games, watch videos and listen to music.

"Cellphone: it's impossible to live without it." [Female, age 35-54]

"I use the phone to be distracted, informed, to communicate, to be entertained and to work." [Male, age 25-34]



"Calls have been displaced by WhatsApp. Cellphones have changed the reality." [Female, age 18-24]

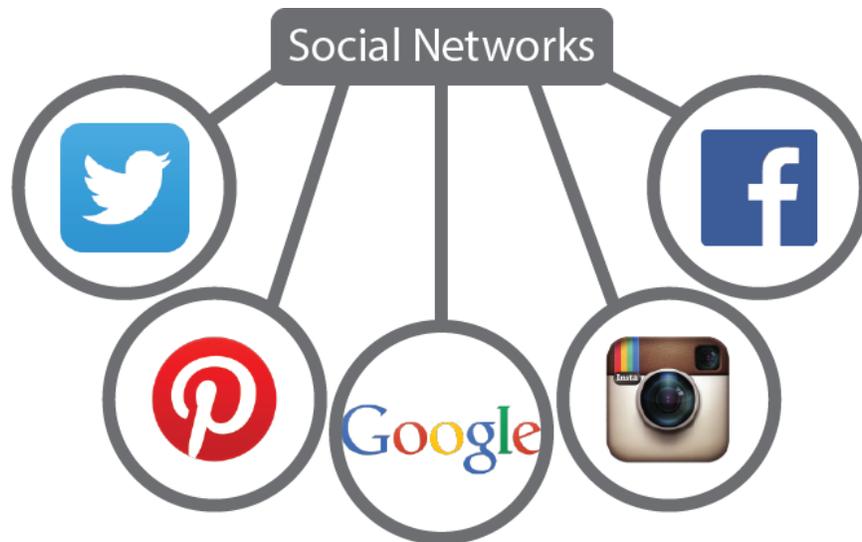
"[A cellphone] is something very private and personal, like a toothbrush." [Female, age 18-24]

Cellphones are considered private, personal devices that are not shared with others. Participants protect their phones with passwords and compare their use of cellphones to keeping a personal journal that if viewed by someone else would reveal everything about an individual and his or her private thoughts. Some parents in the groups allow their children to borrow their mobile phones to play games, but participants are greatly disinclined to share their phones with others.

Social Networks

Facebook is the predominant social network site used by participants. They describe Facebook as a source of news and information as well as a mechanism for keeping in touch with friends and family and making new friends. Both individuals and media entities in Colombia have an active presence on Facebook, which makes it the one-stop source for news and interpersonal communication for the users in the focus groups. For example, traditional media outlets like the newspaper El Tiempo have Facebook pages where users can read up on current events. In Villavicencio, in Meta department, the Villavicencio Dia Facebook page offers information about traffic accidents and other happenings in the city.





Twitter, Pinterest, and Instagram accounts are also popular. These social network websites help the discussion participants stay up to date and keep in touch with friends and family in Colombia and abroad. The platforms Hi5 and Badoo were popular in the past, but have been eclipsed by Facebook and Twitter.

Websites

Google is the preferred website when searching for information online.

“Saint Google’, it is the most popular, you find whatever you need. And it comes in different languages, it has a translator.”[Male, age 35-54]

“Google is a universal search engine. It is the fastest one. In it you find everything. “ [Female, age 25-34]

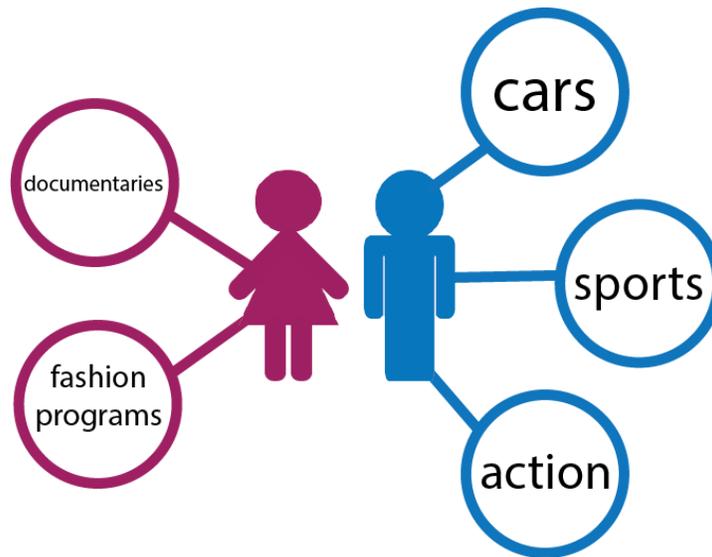
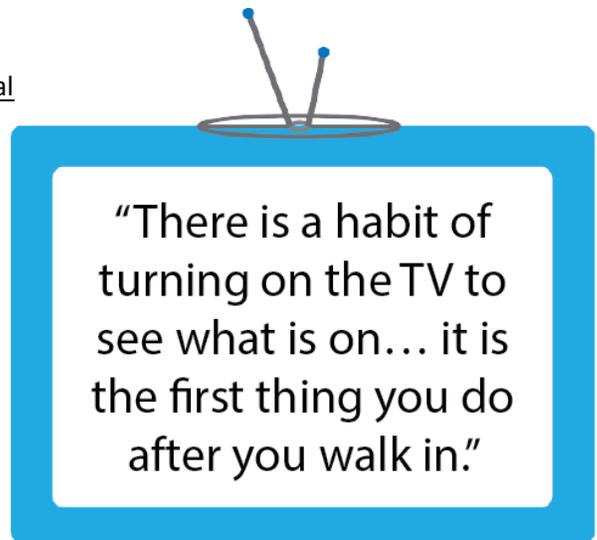
Participants in all three of the Tolima focus groups refer to the search engine as “Saint Google” for its omniscience. Search engines MSN and Yahoo are used but less often.

Online shopping and job searches are common but secondary uses of the Internet. The website Mercado Libre is popular for online commerce. The Computrabajo website lists job opportunities. University students use their schools’ websites for keeping up to date with their classes and professors and for doing research.



Television

To always have the TV on in the home was seen as a cultural marker, something that is distinctly Colombian. One participant said “when I get home, I turn it on even if I’m going to do something else. It’s a Colombian thing to stare at an appliance.” Participants in the regions where the focus groups were conducted report most often watching the Colombian national TV stations Caracol and RCN for news. Says a female age 18-24, “I don’t know a family that doesn’t watch RCN or Caracol.” Caracol anchors are perceived to be more credible and the station is “less about show business, they get to the news more directly and are cleaner when they speak” while RCN is said to be more sensationalist. International TV stations are second in popularity to the Colombian TV stations. International TV stations broadcast programs similar to those in the United States and are popular for movies and series. These stations include the Discovery Channel, History Channel, National Geographic, TNT, Fox, and ESPN. Men prefer sports programs, shows about cars, and action movies. Women express more interest in documentaries and fashion programs.



Watching TV alone or with others depends on the program content and time of day. Watching TV alone avoids having to agree with others what to watch according to the participants. Younger participants watch TV later at night as an individual activity. Men in the groups joked that they surrender control of the TV to allow their wives to watch soap operas. Parents adjust their viewing habits so their young children do not watch inappropriate content. TV viewing is concentrated in the evening hours and at noon. TV is seen as a medium for catching up on the news while relaxing and doing other activities, including social network updates. TV viewing is for entertainment in the evening after the nightly news. Tuning into the news at noon is also a common behavior among participants.

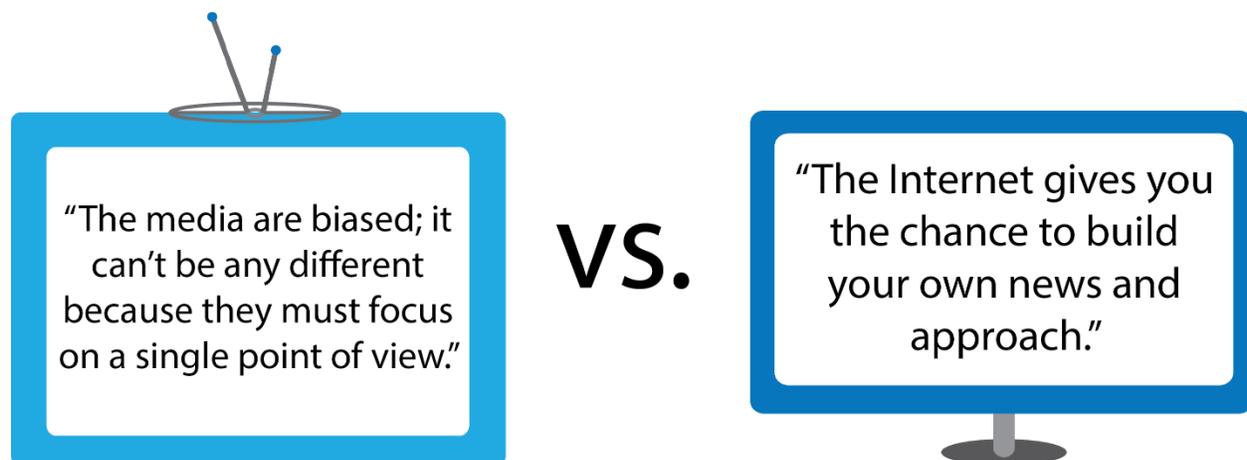


Soap operas are popular programs for both men and women. The programs El Capo and Avenida Brasil were often mentioned by name during the discussions. While some men characterize soap operas as women's programming, they admit they also watch these shows. Participants indicate they are more likely to gather with others to watch soap operas than other programs. Men age 18-24 in Meta comment about the contradiction inherent in the popularity of some soap operas: "...we as Colombians don't like to be called drug traffickers, yet we watch those drug lords' soap operas; it just doesn't make sense."

Popular TV personalities are admired for their tenacity and knowledge of issues. Vicky Davila, Pirry, Manuel Teodoro, Hollman Morris, Maria Lucia Fernandez and Hassam Nassar are journalists whom participants respect for their professionalism and who came up spontaneously in discussions.

At the end of the day, when participants want to relax and be entertained, they turn on the television. Watching TV in the evening at home is how most participants wind down at the end of the day. Many will also use their cell phone or other device at the same time. Watching TV, be it the news, a movie or episodes of a series, is passive consumption of media where the entertainment is provided while the viewer relaxes.

The Internet versus Television: Reliability and Credibility



At the end of the day, when participants want to know what has happened in Colombia and in the world, they turn to the television and/or the Internet.

"On the Internet there are more opinions, different points of view. On television it is only what you see and there is nothing else. When you have the Internet you can search for information from any media. What makes the Internet reliable is checking several sources for information." [Male, age 25-34]

"They don't provide the real information, they decide if it is convenient to blow it up or to minimize it." [Male, age 35-54]



Television, especially the Colombian national TV stations Caracol and RCN, summarize the news for the viewer while the Internet allows them to access a variety of different information sources ranging from the web presence of a traditional media outlet to crowd-sourced news via Twitter and Facebook. Participants said that social networks provide information that TV news lacks. The information on TV is perceived to be controlled by the people who own the TV stations and report the news, whereas the Internet allows the individual to “build their own news” by looking beyond how a story is reported by major news outlets and consider information from other groups and individuals.

Radio

Radio is heard in the background, for example on public transportation or in the kitchen, while doing other activities.

“TV and the Internet displaced radio which was very popular back in the day. Newspapers have also lost popularity.” [Female, age 18-24]

“It is better to watch images than to just listen.” [Female, 25-34]

“Everyone listens when on the bus, but not by choice.” Many mention that the radio is playing when they take public transportation so they hear it along with the other passengers. Most participants do not regularly or purposefully tune into the radio and when they do it is for music and entertainment rather than for news and information. Local stations are recognized as distinct from larger stations for offering information that is useful for residents of the local area. Radio is credited for being more up to date and attuned to local conditions than TV in emergency situations because the production time is shorter. Participants also noted that when the mobile phone network is down, radio informs people about what is happening.

Participants prefer radio programs for a youthful audience. A few participants express a preference for certain musical genres (rock music, salsa) and the stations that broadcast this music. Others report they listen to the station La Mega for the show “Paranormal” about paranormal activities, Los Huestos de Marrano with “The Cartel” a group of radio personalities who tell “crass jokes” and to “Las 40 Principales,” a Top 40 music show.

Print Media

Print media is the media format used least often.

“We have become lazy. Why buy newspapers when you can listen to what’s being said everywhere.” [Female, age 18-24]

“We became lazy readers, it is all about the visuals instead of reading, we enjoy a photograph more. The habit of reading is fading. With the death of [Gabriel] Garcia Marquez, many students were asked if they knew his works and sadly the majority didn’t. We have given up physical reading.” [Male, age 35-54]

Participants do not buy print media such as magazines and newspaper but read it if it is around and prefer to read the online versions of print media publications. El Tiempo is most often mentioned as a source of information, followed by El Spectador. The tabloid El Extra is more widely distributed than the



newspaper El Tiempo but it is described as sensationalist and morbid, showing scandals and accidents. Likewise Q'Hubo is criticized as a very vulgar and bloody tabloid.

Business Interests and Media Integrity

Special interests are seen as controlling the content of traditional media but the Internet is unfettered by political constraints.

“TV is only what they want to show you.” [Male, age 18-24]

“On the Internet you can check different sources, while on TV, interests manipulate the information.” [Male, age 35-54]

“The social networks give direct access to real information, uncensored by the traditional media.” [Male, age 35-54]

Participants think business interests and the media are intertwined in Colombia, which influences how TV stations report the news. The national TV stations Caracol and RCN are owned by politically influential business conglomerates. Participants say this motivates the TV stations to handle the news as it is convenient for them. People who report the news on TV are able to control the content. By contrast, the Internet is more reliable and objective because it is not filtered by the government and presents many different viewpoints.

Methodology

The six focus group discussions were held with residents of the two departments of Tolima and Meta, which are in central Colombia near the capital district Bogota, from July 18-24, 2014. Three of the focus groups were comprised of women and three were conducted with men. Participants ranged in age from 18 to 54. Most participants have completed high school and have a variety of occupations.

For more information, contact:

Matt Warshaw matthew.warshaw@d3systems.com or Alicia Boyd alicia.boyd@d3systems.com

