

Streaming services consumer behaviour: a Netflix user case study in Brazil and Portugal*

Comportamento do consumidor de serviços de streaming: um estudo de caso de usuário da Netflix no Brasil e em Portugal

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ABSTRACT

The development of the Internet in the 1990s favoured the emergence of electronic commerce. Since then, streaming services have been gaining space, like Netflix. In Brazil and Portugal, the company's popularity is remarkable. Thus, the objective of this study is to understand the behaviour of Netflix consumers in both countries. This study has as methodology the case study. The data collection was done through a digital questionnaire made available to the Brazilian and Portuguese public. The valid answers of this sample (210 Brazilians and 38 Portuguese) were analysed in a quantitative-qualitative approach using descriptive statistics and content analysis. The results indicate that Brazilians use Netflix more than the Portuguese. It influenced Netflix's signature, family members of clients in Brazil and friends of clients in Portugal. The most watched content in both countries is serial, and the kind of action is preferred by users, who watch the work on weekends, via broadband, through Smart TV. Customer satisfaction levels in both countries are high, never had problems with the company and would indicate the service to others.

Keywords: E-commerce; Netflix; Consumer behavior; Brasil e Portugal.

RESUMO

O desenvolvimento da Internet na década de 1990 favoreceu o surgimento do comércio eletrônico. Desde então, os serviços de streaming vêm ganhando espaço, a exemplo da Netflix. No Brasil e em Portugal, a popularidade da empresa é notável. Assim, o objetivo deste estudo é entender o comportamento dos consumidores da Netflix em ambos os países. Este estudo tem como metodologia o estudo de caso. A coleta de dados foi feita por meio de questionário digital disponibilizado ao público brasileiro e português. As respostas válidas desta amostra (210 brasileiros e 38 portugueses) foram analisadas em abordagem quantitativa-qualitativa utilizando estatística descritiva e análise de conteúdo. Os resultados indicam que os brasileiros

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usam a Netflix mais do que os portugueses. Influenciou a assinatura da Netflix, familiares de clientes no Brasil e amigos de clientes em Portugal. O conteúdo mais assistido em ambos os países é série, e o gênero de ação é preferido pelos usuários, que assistem aos trabalhos nos finais de semana, via banda larga, através de Smart TV. Os níveis de satisfação dos clientes em ambos os países são altos, nunca tiveram problemas com a empresa e indicariam o serviço para outras pessoas.

Palavras-chave: E-commerce; Netflix; Comportamento do consumidor; Brasil e Portugal.

A) 1. INTRODUCTION

Advances on the Internet have transformed the audio-visual industry, bringing about changes in the way consumers acquire and enjoy new film and TV content. The changes were made possible using a new technology called streaming, a service for online distribution of multimedia content. As Dall'Orto e Silva (2017) point out, streaming is a tool for reception and transmission of content, through the Internet, which grows exponentially in the entertainment market. The technology becomes more popular every day, offering the consumer a multiplicity of content in real time. With it, consumers can buy services online and watch movies and series at any time through screen devices such as cell phones, notebooks, desktops, tablets and televisions (Lima, 2015).

In this respect, Netflix stands out in the world context as the largest provider of films and television series via streaming. Founded by Reed Hastings (1960-) and Marc Randolph (1958-) in August 1997, in the city of Scotts Valley in Silicon Valley, USA, the company emerged as a DVD rental service by mail. Netflix made the movie titles available on its institutional website. The subscriber accessed the company's website and chose the film. The receipt and return of the DVDs were done via post. In 1999 the company adopted the subscription system with unlimited rents. The absence of a determined time for the return of the DVDs was a success, as it brought more flexibility to the user. In 2007 the company used the streaming technology per monthly subscription, making millions of movies and series available to subscribers through the computer. Two years later the organization started to make its films and series available via TV, cell phones and tablets. (Saccomori, 2015)

In order to understand this new consumption behaviour of users of audio visual content offered online, the research presented in this article will seek to answer the following main question: What are the differences (if any) in the profile and behaviour of Brazilian and Portuguese consumers regarding the use of the Netflix service? To answer this question, the general objective is to understand the behaviour of consumers of Netflix services in Brazil and Portugal based on the models of consumption behaviour and purchase decision proposed by Kotler e Keller (2012), Turban et al. (2015) and Laudon e Traver (2017).

The social relevance of this work lies in the understanding of the consumption behaviour of users of film and TV services in the online mode.

The rest of this article consists of the theoretical framework, where we work on theoretical supports related to marketing, e-commerce, consumer behavior and consumer buying decision process. Following, the methodology, including our theoretical and methodological apparatus for conducting the research. The article continues with the results, where we apply the knowledge of our bibliographic survey to understand the behavior of Brazilian and Portuguese consumers on Netflix. The article finishes with the conclusion.

B) 2. THEORETICAL FRAMEWORK

Laudon e Traver (2017, p. 9) formally define e-commerce as a set of "digitally activated commercial transactions between organizations and between organizations and individuals". These transactions include all digitally mediated operations that occur mostly on the Internet, the Web, and other mobile devices. It should be clarified that the Internet and the World Wide Web are different structures. While the Internet is a worldwide network of computers, the Web is one type of Internet service, and one of the most popular because it allows access to billions of virtual pages. (Laudon & Traver, 2017).

In historical terms, Turban, D. C., Turban, E., King, D., Lee, J. K., & Liang, T. (2015) place the first electronic commercial applications at the end of the 1970s, when financial institutions transferred funds, electronically, among themselves. In this context, Electronic Data Interchange (EDI) technology was used, which expanded to other types of transactions, from which e-commerce evolved to other activities, such as travel booking and online stock trading. (Turban et al., 2015).

Turban et al. (2015) mention that increasing competitiveness in the market has placed as an imperative task for companies the understanding of customer needs and their consumption behaviour to influence them in the purchase of services and products. In this sense, the authors have developed their own model of purchasing decision making process, arguing that this process usually starts with the awareness of the purchasing situation followed by a positive attitude that ends with the consumer's decision to buy and/or buy again.

For Turban et al. (2015) the purchasing decision process is composed of the steps described following.

c) Need for identification: for a purchase process to begin, the possible consumer must recognise a need. This recognition can be done in various ways, by internal stimuli (hunger or thirst, for example) or by external stimuli (advertising). The task of the marketing server, at this point, is to make the consumer perceive a need and convince him/her that a certain product or service will fill that need.

d) Search for information: after recognizing a need, the prospective buyer will search for information on how to meet this demand. At this moment, there are two decisions that can be separated or combined: what to buy and from whom. This being clear, the consumer will search in catalogs, advertisements, promotions and in reference groups - family, friends. Of course, online searches are also useful at this stage because of the comparison mechanisms they offer.

e) Evaluation of alternatives: searches for products and services indicate viable options. From these, the prospective buyer will evaluate the alternatives, perhaps also including term negotiations. At this stage, the buyer will create and organize criteria to make its final choice. For online consumers, the criteria may include prices and product features.

f) Purchase and delivery: After experiencing the three previous phases, the buyer will make the final choice of purchase. In this phase, payment, delivery, purchase guarantees are organized, among other factors.

g) Post-purchase activities: this last phase consists of customer service and its evaluation of the utility of the product. In case of customer satisfaction in these two aspects, the purchasing experience will be positive and the consumer will tend to collaborate with the disclosure of the product and create the bond of loyalty, increasing the chances of repeating purchases of products of the brand acquired.

Laudon e Traver (2017) also present a model of the purchase decision process, more focused on online transactions, which we present following.

- a) Awareness of need: graphic ads targeted at potential buyers via social networks and e-mails;
- b) Search for information: from search engines (Google etc.), online catalogues, visits to shopping sites and ad views on social networks and e-mails;
- c) Evaluation of alternatives: the weighting of purchase options is made after taking into account the previous aspects and also through review and/or evaluation of products by online users;
- d) Real purchase decision: online promotions, discounts, targeted e-mails and the possibility of flash sales are essential for this;
- e) Post-purchase contact with the company: made through consultation with the communities on the consumption of the products purchased, newsletters, customer emails, online updates and social networks.

The similarities in the nomenclatures and concepts of the purchase decision process models of the studies presented are noticeable, which give theoretical and methodological support to our work.

3. METHODOLOGY

This research classifies itself, in relation to its procedures, as a case study. The approach is quantitative-qualitative of the descriptive type, since it aims to describe the characteristics of Brazilian and Portuguese consumers who use Netflix services, establishing relationships between the categories used in the consumer behaviour model of authors Turban et al. (2015) and Laudon e Traver (2017).

As for the technical procedure, the research is characterized as bibliographic, whose main sources were materials already published, consisting of books, dissertations and articles from scientific journals made available in several electronic databases (Marconi & Lakatos, 2011), which served as theoretical support for the main topics related to our main intention: to understand the behaviour of Netflix consumers in Brazil and Portugal.

The data was collected through an online survey application implemented in Google Forms. The questionnaire, about the use of Netflix services by Brazilians and Portuguese, presented 31 (thirty-one) questions. Of these, 26 (twenty-six) were open and 5 (five) closed. This questionnaire was disclosed to the Brazilian and Portuguese public for 28 (twenty-eight) days, between August 30, 2019 and September 26, 2019. To the Brazilian public, the announcement was made through the WhatsApp application and to the Portuguese public, via e-mail and social networks (Facebook). Sampling was done using the snowball technique. According to Juliana Vinuto (2014), snowball sampling is a form of non-probabilistic sampling that uses reference chains. Therefore, it is impossible to determine the probability of choosing each respondent in the survey, although it is a useful sample to examine groups whose access to them is more complicated. For the aforementioned author, this type of sampling is widely applied in social networks, via the internet.

In all, the questionnaire received 48 responses from Portuguese and 214 responses from Brazilians. Of those numbers, there were 210 valid answers from Brazilians and 38 valid answers from Portuguese, totaling 248 respondents.

The tabulation of quantitative data from the questionnaires was achieved through Microsoft Excel 365 ProPlus and IBM SPSS - Statistical Package for the Social Science applications.

For the analysis of the data obtained, we used Descriptive Statistics. The presentation of these data was made through tables and graphs, aiming to clarify the interpretations and analysis.

H) 4. RESULTS AND DISCUSSION

In this topic we will discuss the results obtained through data collection via online questionnaire, answered by Brazilian and Portuguese Netflix consumers. First, we will discuss the Sample Characterization and then the Purchase Decision Process.

4.1 CHARACTERIZATION OF THE SAMPLE

In the distribution of respondents by nationality and sex, women are in the majority in both countries, with 60.5% participation in Portugal and 59.5% in Brazil. The result suggests that women predominate as Netflix clients, with similar participation in the two countries in question as a percentage.

Regarding nationality and age group, most Brazilians are between 26 and 33 years old (27.6%). In the case of the Portuguese, the majority is in the 34 to 41 age group, (26.2%). Regarding nationality and marital status, most Brazilian respondents are married or in a stable union (61.0%). Most Portuguese are single (50.0%). Regarding nationality and level of education, it can be observed that both in Brazil (51.0%) and in Portugal (52.6%), most respondents have higher education.

In what concerns nationality and income, in Brazil, most of the respondents have income above 10 minimum wages (23,8%). In Portugal, most have incomes between 2 and 4 minimum wages (36,8%). For a better understanding of the respondents salaries, the current value of the Brazilian minimum wage is R\$ 998.00 (nine hundred and ninety-eight reais) and the current value of the Portuguese minimum wage is € 600.20 (six hundred euros and twenty cents), converting these, the Brazilian salary of R\$998.00 equals €222.60 and the portuguese salary of €600.20 equals R\$2,690.94 (Valuta FX, 2019).

We sought to verify the time of use of Netflix services among respondents. In Brazil, the majority uses the service "between 2 years and 2 years and 11 months" (30.5%). In Portugal, most Portuguese use the services for less time, "between 1 year and 1 year and 11 months" (34.2%). This difference in time of use of the Netflix service in both countries may be related to the arrival of the company in each of them, in Brazil, Netflix arrived in 2009, in Portugal, in 2015. (Tek.sapo, 2015).

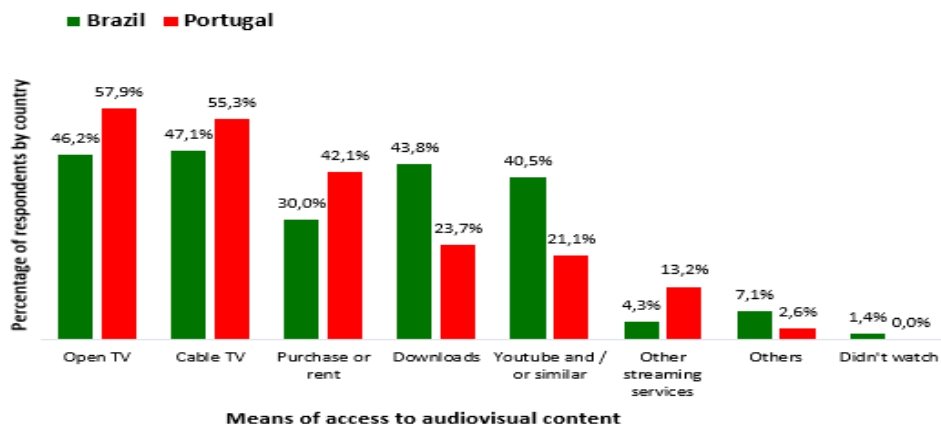
4.2 PURCHASE DECISION PROCESS

The presentation of the results on the purchase decision process will be made in the following order of topics: Identification of Need, Search for Information, Assessment of Alternatives, Purchase and Delivery, Post Purchase Activities, as follows.

4.2.1 Identification of Need

At this stage, buyers, stimulated by internal or external factors, recognize one or more needs and then trigger the procurement procedure of goods and/or services to meet those needs. As for the analysis of data on the means of consumption of audio-visual products by Netflix users prior to their joining the company, Figure 1 reveals that in Brazil and in Portugal, most consumers used "Pay TV" and "Open TV".

Graphic 1: Graphic Media Access to Audio-visual Content Before Netflix Use - Brazil and Portugal (2019).



Source: Research data.

In relation to other choices, we see that the third largest number of Brazilians opted for "Downloads" to consume audiovisual works. The third largest number of Portuguese consumed via "Purchase or rent". "Other streaming services" were seldom used by Brazilians, as only 4.3% of these consumers selected this option. The percentage of 13.2% of Portuguese for this same option shows a greater use of other streaming services by respondents from Portugal. In addition to these aspects, we see a similarity, between the two countries, for the latter options, selected by the minorities of Brazil and Portugal.

4.2.2 Information Search

This phase begins with the consumer's interest, which is open to receive information about the products and services they believe may satisfy their needs. The result of the analysis shows that most Brazilians and Portuguese met Netflix "Through friends or family". In the case of the Portuguese, they met the company through "Internet/social networks".

Regarding the source of information about the attributes and characteristics of Netflix's services, for most Brazilians it was through "Friends/Families". For most Portuguese, the source of information was through "Internet searches/search sites" (Table 1).

Table 1. How Netflix Was Known and Source of Information - Brazil and Portugal (2019)

Categories	Variables	Items	Brazil (%)	Portugal (%)	
Information Search	How Netflix Was Met	Through friends or family	79,5	65,8	
		Internet/social networks	48,1	65,8	
		Other	6,7	36,8	
		Radio or television advertising	5,2	2,6	
		Advertising in magazine or printed newspaper	1,9	0,0	
		Billboard advertising	0,0	0,0	
	Netflix Information Sources	Netflix Information Sources	Friends/families	60,0	52,6
			Internet searches/search sites	57,1	68,4
			Social networks/institutional website of the company	20,5	34,2
			Other means	4,8	2,6
			Printed newspapers/magazines	1,0	0,0

Source: Research data.

The result presented corroborates what Kotler e Keller (2012), Turban et al. (2015) and Laudon e Traver (2017) advocate, which advocate that the reference groups "family" and "friends" are decisive influences in the purchasing process. Affective ties with these loved ones collaborate, in a remarkable way, so that consumers believe that the company suggested by such entities offers a competent service to meet their needs.

4.2.3 Assessment of Alternatives

This stage consists of the peculiar and rational judgment that each consumer makes about which purchases to make from the available options. This procedure may also include reviewing and/or evaluating the products offered. Regarding consumption, Table 2 indicates that most Brazilian and Portuguese consumers have Pay TV. However, in Portugal the number that makes use of Pay TV is the double of Brazil, although the company Netflix arrived in this country after having started its activities in Brazil.

Crossing the data of Pay TV use with the data of income, it is observed that in the Brazilian case, the income contributes to the concomitant use of Pay TV and Netflix, because of the majority of Brazilians, 101 (from the total of 210 consumers), who use the two services, 34.7% have income superior to 10 minimum wages. The same relation (income and use of the two services) is not observed in relation to Portugal, because the greater number of users of the two services, 34.2% have an income that can be considered below the average (for Portugal), between 2 and 4 minimum wages.

Regarding the attributes considered decisive for consumers to have acquired Netflix services, Table 2 shows that most Brazilian and Portuguese consumers marked "Possibility to watch favourite programming at the time or place that is convenient" as the main attribute to choose Netflix. Therefore, the importance of time autonomy for users in relation to the forms of consumption of audio-visual products is noted.

Analyzing Table 2, the data referring to preferences in relation to Netflix's programming indicate that Brazilians watch more films than the Portuguese and these watch more series than the Brazilians. Other data such as the "Possibility of having users with different preferences

Table 2. Netflix Usage and Main Attributes - Brazil and Portugal (2019)

Categories	Variables	Items	Brazil (%)	Portugal (%)	
Assessment of Alternatives	Use of Pay TV -	I currently have	48,1	92,1	
		I did, but I canceled the service	31,4	2,6	
		I never had	20,5	5,3	
	Decisive Attributes for Subscribing to Netflix		Possibility to watch the favorite schedule at the time or place that is convenient	69,5	71,1
			Variety of films available	65,7	68,4
			Variety of series in the catalogue	46,2	55,3
			Possibility of sharing the account with other people	45,7	52,6
			Possibility of having several users using the service with the same subscription	41,4	42,1
			Updated movie catalog with frequent releases	32,4	39,5
			Possibility of having users with different preferences using the service with the same subscription	29,5	31,6
			Offer films and series originally produced by Netflix	24,8	31,6
			Be able to use the service for one month free of charge	21,4	31,6
			Updated series catalog with frequent releases	14,8	26,3

Source: Research data.

using the service with the same subscription”, selected by 29.5% of Brazilian consumers, portray the importance of reference groups such as family and friends, for them. Some responses regarding the main influence on the decision to consume Netflix's services and products point to the appreciation of sharing subscriptions between loved ones. The numbers tell us that there is an equality between countries regarding this option. We can then deduce that it is common, both among Brazilians and Portuguese, to share accounts on Netflix. Another important information that the data brought us, as a comparison between the behavior of consumers in both countries, is that both give the same degree of importance to customer loyalty processes.

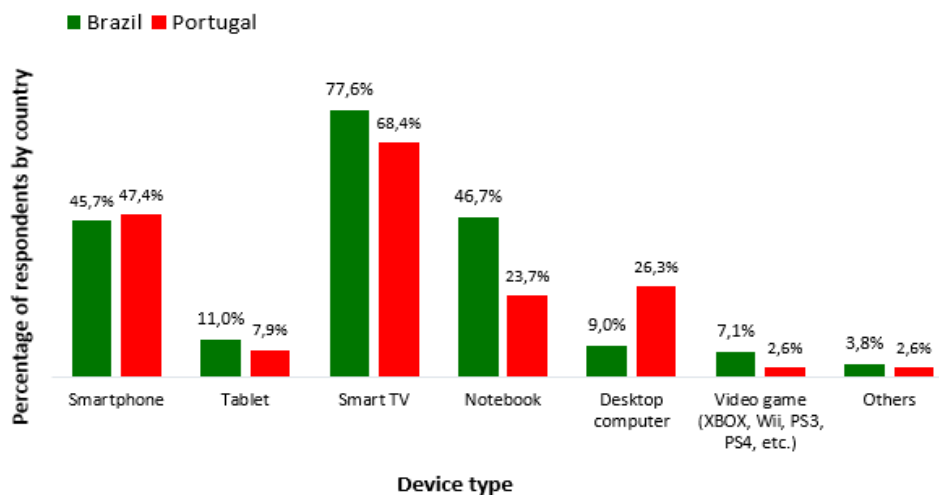
4.2.4 Purchase and Delivery

At that stage, consumers make a decisive choice about purchasing. Factors that can positively influence this decision are discounts, online promotions, targeted e-mails and even flash sales with advantages for the consumer. At this stage of the purchase process, payment, delivery and guarantees are also organized (Kotler & Keller, 2012; Turban et al., 2015; Laudon & Traver, 2017). Regarding this question, it was possible to verify that in both countries, most of the times, the respondents themselves are the holders and responsible for the payment of the subscriptions in Netflix, 51.4% of Brazilians and 36.8% of Portuguese. They access the service mainly via Internet Broadband at home, 51.4% of Brazilians and 36.8% of Portuguese.

Regarding the type of device used to access Netflix, Figure 2 indicates that most Brazilians and Portuguese use Smart TV, which leads us to believe that this use is domestic, a finding supported by the data exposed above, which show that most of the two countries access

Netflix via broadband at home. We also see that the second majorities of the two countries - 45.7% of Brazilians and 47.4% of Portuguese - access Netflix via smartphones.

Graphic 2: Devices Used for Consumption by Netflix - Brazil and Portugal (2019).



Source: Research data.

It was also found that most Brazilians and Portuguese attend Netflix on weekends and/or holidays and on the night shift, totalling 60.5% and 52.6% respectively.

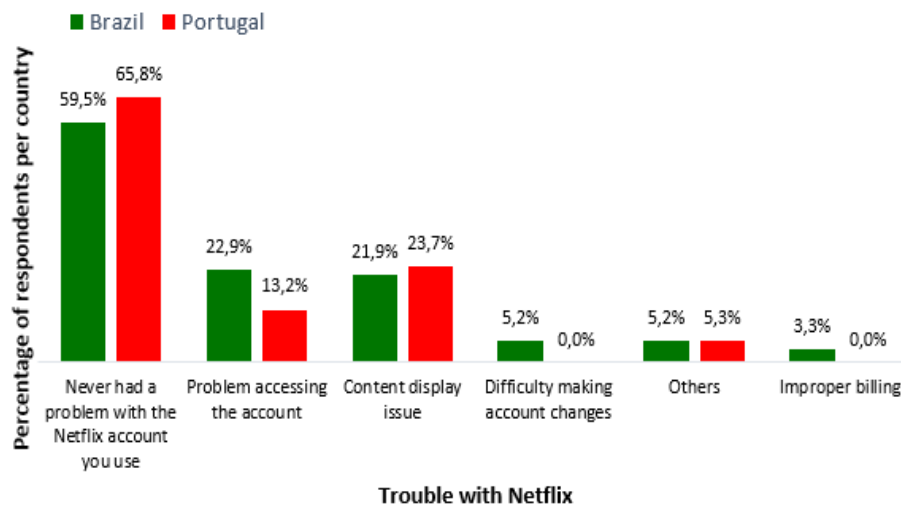
Regarding the content preferences of consumers in both countries, most Portuguese consumers (92.1%) and most Brazilian consumers (78.1%) watch more the series; followed by films for Brazilians (74.3%) and documentaries for Portuguese (39.5%).

The genre of action is, remarkably, the greatest preference of consumers in both countries: 69.0% of Brazilians and 71.1% of Portuguese; second, also for both countries, comes comedy (53.3% of Brazilians and 68.4% of Portuguese).

4.2.5 Post-buying activities

The last phase of the consumption process is based on customer service and the use of the product. At this time, it is common to consult consumer communities - via telephone, e-mails or social networks - to observe some points such as customer satisfaction and use of products after purchase. If the purchase meets the needs and expectations of consumers, they are satisfied and can even promote the product due to their positive experiences (Kotler & Keller, 2012; Turban et al., 2015; Laudon & Traver, 2017). Thus, it was analysed if consumers had problems using the Netflix account, Figure 3 indicates that most Brazilian and Portuguese consumers informed that they never had problems with the company.

Graphic 3: Problems with Netflix – Brazil and Portugal (2019)



Source: Research data.

As for the level of consumer satisfaction with Netflix, eight aspects of the services were analysed, in Brazil, all of them showed a tendency to Satisfied; in Portugal, consumer satisfaction was revealed in 6 of the aspects analysed. This result indicated the possibility of Netflix recommendation by consumers, since 76.2% of Brazilian consumers and 78.9% of Portuguese consumers would indicate Netflix to friends and/or family.

According to Coletti (2018), the survey conducted by the American Customer Satisfaction Index in 2018, which measured the rates of streaming services of Netflix, Hulu, Amazon and YouTube Red - consumers prefer streaming services, as 75.0% of customers consulted are satisfied with these companies against a total of 62.0% of satisfied Pay TV customers. And for the streaming companies, once again Netflix was the leader in the movement as it included a total of 78.0% satisfied streaming customers with the company versus an average of 76.0% satisfied YouTube Red customers and 75.0% satisfied Amazon and Hulu customers (COLETTI, 2018).

5. CONCLUSION

Considering the valid responses of Brazilian and Portuguese consumers, we observed that it is women who predominate as Netflix users and the education levels of most consumers in our sample are high. The data regarding income show that Portuguese consumers, in general, receive better wages. Nevertheless, it is the Brazilian consumers who use Netflix the longest, which is explained by its arrival in Brazil in 2009 and in Portugal in 2015.

Before adopting Netflix, a large part of consumers in both countries used to consume audio-visual works through Open TV and Pay TV. The majority of the two countries also match the main need that guided the demand for the service: desire for an entertainment medium with quality, variety and safety. We realized that the reference groups closest to the users as friends and family had a decisive influence on consumers choosing the company. In addition to these convivial influences, certain attributes of the company such as the possibility of watching

content at any time and place and the variety and quality of films and series have contributed to the subscriptions to its streaming services.

It was also discovered that most Brazilian and Portuguese users consume the works on weekends and/or holidays at night. The means of access for most consumers in both countries is at home, via broadband internet. Therefore, access via Smart TV predominates. Concluding our analysis, we realize that the satisfaction levels of customers of both nationalities are high.

As for the limitations of our study, we recognize that our sample is not very representative for both countries. However, this numerical characteristic does not invalidate this research, since we work with the sample that was possible to collect, applying to it theoretical and methodological knowledge of a scientific nature, thus showing the legitimacy of this type of knowledge to know and understand important aspects of societies and their conduct, as in the case investigated, consumption behavior.

In a possible future study, this limitation can be solved by working with data from a broader and more diverse sample. This may also coincide with different research objectives, such as comparing Netflix consumer profiles with consumer profiles of other growing streaming companies, such as Amazon Prime Video and HBO Go.

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