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Virus on the screen: consumption habits of the television audience in Spain and Italy (2019-2022)

El virus en la pantalla: hábitos de consumo de la audiencia televisiva en España e Italia (2019-2022)

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Abstract
The effects of the pandemic affect multiple areas of our lives, including those related to the media. In the television field, the pandemic came at a time of great transformation in the sector. After more than two years since its inception, this research addresses a diachronic study that covers four years, and comparative between Italy and Spain. Starting from a longer time perspective constitutes the differential value of this study since it aims to assess what dynamics subsisted or changed after confinement once the process of returning to normality began.
This research intends to know, through a quantitative descriptive exploratory methodology, the linear consumption of television by the population of both countries, trying to identify the habits of the audience and the variations in the behavior of the population with respect to the television medium. Analysis carried out allows us to confirm that media consumption during the first phase of the pandemic was exceptional in the evolution of television in both countries, but it did not introduce new dynamics but instead strengthened existing trends.

Keywords
audience; covid; Spain; Italy; pandemic; television

Resumen
Los efectos de la pandemia afectan a múltiples facetas de nuestra vida incluidas aquellos relativos a los medios de comunicación. En el ámbito televisivo la pandemia llegó en un momento de gran transformación del sector. Tras más de dos años desde su inicio en esta investigación se presenta un estudio diacrónico, que cubre cuatro años, y comparativo entre Italia y España. Partir de una perspectiva temporal mayor constituye el valor diferencial de esta investigación ya que se propone evaluar qué dinámicas subsistieron o cambiaron tras el confinamiento una vez iniciado el proceso de vuelta a la normalidad.
Esta investigación pretende conocer mediante una metodología exploratoria descriptiva de corte cuantitativa el consumo lineal de la televisión por parte de la población de ambos países tratando de identificar los hábitos de la audiencia y las variaciones en los comportamientos de la población respecto al medio televisivo. El análisis realizado nos permite confirmar que el consumo mediático durante la primera fase de la pandemia supuso una excepcionalidad en la evolución de la televisión en ambos países pero no introdujo dinámicas nuevas en los años posteriores sino que potenció tendencias ya existentes.

Palabras clave
audiencia; covid; España; Italia; pandemia; televisión

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1. Introduction

The Sars-CoV-2 pandemic has resulted in multiple changes in people's lives. It rocked our routines and lifestyles, introduced practices very far removed from our customs, and reinforced pre-existing dynamics. In the field of television, the pandemic occurred at a moment of great change in the sector (Scaglioni, 2021a). The context was that of fluid television (Quintas-Froufe & González-Neira, 2016) in which it was ever more difficult to distinguish between makers and users after the irruption of multiple and varied actors such as YouTube, Netflix or Amazon Prime. The traditional channels had begun a forced restructuring process because of the new competition and the explosion of digital consumption (Francés & Peris, 2022). As indicated by López-Cepeda & Tilli (2022: 366), among the traditional broadcasters, the public television companies found themselves deep in a complex crisis, facing great challenges. All this in the framework of a media convergence process that facilitated transmedia strategies due to the spread of mobile devices, improvement of internet connections and the social network boom. Digitalization was altering every work stage of what had been the king of the media, from preproduction to production and even the new business models facing a new competitive panorama. The pandemic, then, appeared in a new hybrid media system (Chadwick, 2017) in which television, radio and the press were constantly interacting with the digital platforms.

The confinement because of the pandemic was a months-long large-scale scientific experiment. For the first time in the history of European television we experienced the concept of a simultaneous captive audience as, for several months, Europe underwent a lockdown which had only been seen previously during periods of war and natural disasters. Leisure and socialization possibilities were reduced and television was a window to the outside through which a large share of the population peeked. The passage of time often seemed to slow down and the small screen became a refuge in a situation of unexpected crisis. As stated by Scaglioni (2020), it defined new internal timings and changed family dynamics as, once again, complete families came together for news bulletins or special broadcasts (bulletins by leaders, or religious events in the case of Italy). However, we cannot compare the term captive audience to that of the past, as occurred during the Franco dictatorship (Antona Jimeno, 2016), since there is no doubt that the digital setting eased the months of seclusion by multiplying the potential for leisure and personal contact. In the era of active audiences, this seclusion did not impede the existence of a great variety of digital content which completed the offer of linear television.

Extraordinarily, there was a coincidence of two factors that created an unprecedented state of affairs. On the one hand, the impossibility of enjoying leisure outside one's home; on the other the urgent need for information in the critical situation caused by the pandemic (political decisions, the impact of COVID, learning how to avoid contagion, etc.). On this point, there is a varied bibliography underlining the value of communication and publicity in times of crisis (Puebla Martínez, Vinader Segura & Navarro Sierra 2022; Blanco-Herrero, Gallardo-Camacho & Arcila-Calderón, 2021; Casero-Ripollés, 2020; Masip et al., 2020; Muñiz, 2011; Davis & French, 2008; Seeger, Sellnow & Ulmer, 2003).

As indicated by Mihelj, Kondor & Štětka (2022), the pandemic was like a "hybrid media event" (Vaccari, Chadwick & O'Loughlin, 2015), with audiences who combined television broadcasts with the use of social networks and news sites. There is no doubt but that television played a crucial role in the everyday life of the locked-down population (Scaglioni & Sfardini, 2020), and so there was a generalized rise in audience numbers. In spite of the growth of the digital media, television maintained its lead in the different media. In Spain, according to the Centro de Investigaciones Sociológias (2020), during the lockdown, 72.4% of Spaniards followed the news on the diverse communication media to a greater extent, and 69.3% watched more series, films and documentaries on television (this last percentage reached 72.3% in September 2021). In Italy, during the first weeks of the pandemic in the first lockdown (March 2020), television consumption grew 20% on average and in the first stages people were most interested in news; later there was more interest in entertainment content, particularly in lifestyle theme channels (+10%) and those specializing in cinema and fiction (+9%) (GFK, 2020).

The pandemic has focused the research of many scholars in the field of communication from different and varying perspectives and has fostered the publication of innumerable studies. If we limit this to the area of television audiences, diverse works have thoroughly explored media consumption during the lockdown (Mihelj, Kondor & Štětka, 2022; Cobos, 2021; Llorca Abad, 2021; Scaglioni, 2021b; Calvo Gutiérrez & López Frías, 2020; Fieras Ceide, Túñez López & Vaz Álvarez, 2020; Mikos, 2020). There is considerable bibliography on how society was informed at a time of crisis, what strategies were used by the media, mainly by television (Rosique Cedillo & Flores, 2022; Maloney et al., 2022; Geni, Briandana & Umarella, 2021; Morejón Llamas, 2021; Rebolledo, González & Olza, 2021; Villena-Alarcón & Caballero-Galeote, 2020), and on how society gathered its information during this period, that is to say, what media they chose and why (Bernal, 2021; Mora-Rodríguez & Melero-López, 2021; Van Aelst et al., 2021; Lemenager et al., 2021; Masip, Ruiz Caballero & Suau, 2021; Sanjuán Pérez et al., 2020; Montaña Blasco, Ollé Castellà, & Lavilla Raso, 2020; Moreno, Fuentes-Lara y Navarro, 2020; Nielsen et al., 2020; López-Rico, González-Esteban & Hernández-Martínez, 2020), outstanding amongst which is the lead role of television and the digital media. Casero-Ripollés (2020) contributed one of the first reflections on the communication and democratic consequences of people's news practices during Covid-19. Special attention has been paid in these studies to the state-owned media during the pandemic, which have been analysed by López-Cepeda & Tilli (2022) or Túñez-López, Vaz-Álvarez & Fieiras-Ceide (2020).

In other cases, these analyses have been carried out from perspectives as varied in the field of audiences as the study of viewing during the lockdown from the uses and gratifications theory (Igartua, Ortega-Mohedano & Arcila-Calderón, 2020; Rochyadi-Reetz, Maryani & Agustina, 2020) or by analysing the influence of restrictions to mobility on media consumption (Silva-Torres, Martínez & Cambra, 2022). In view of the lack of immediate official data, a high proportion of the works published on audience behaviour during the first few months of the pandemic opted for surveys as their main methodology (Bernal, 2021; Skarpa & Garoufallou, 2021; Stjernswärd, Ivert & Glasdam, 2021; Arana Arrieta, Mimenza Castillo & Narbaiza Amillategi, 2020; Masip et al., 2020; Montaña Blasco, Ollé Castellà, & Lavilla Raso 2020; Moreno, Fuentes-Lara & Navarro 2020). In addition, there have been numerous research works on the consumption during the lockdown of social networks and new platforms (YouTube, Tik Tok, Facebook, Twitter), on misinformation and fact-checking, which are outside the remit of this work.

We believe that over two years after the beginning of the pandemic, there is a need to undertake a diachronic comparative study between Italy and Spain. The principal objective (PO) is to understand the linear consumption of television by the population of the two countries by identifying audience habits and the variations in people's behaviour regarding the TV media. Using a longer timescale constitutes the differential value of this research in its analysis of the impact the pandemic had on television consumption, understanding how it affected the aforementioned process of evolution. That is to say, the aim is to assess which dynamics subsisted or changed after the lockdown, once the process of returning to normality had begun.

In order to better understand this evolution, we must underline a few key dates which allow us to contextualize their reality analysed in the two countries:

Italy:

- 31 January 2020: first cases detected in two Chinese tourists.
- 31 January 2020: a state of emergency was declared.
- 31 February 2020: first patient hospitalized in Codogno (Lombardy).
- 5 March 2020: closure of schools and universities.
- 11 March de 2020: start of lockdown all over the country.
- 3 June 2020: return of interregional mobility.
- 31 March 2022: end of state of emergency.

Spain:

- 31 January 2020: first case detected in La Gomera in a German tourist.
- 12 March 2020: cancellation of classes all over Spain.
- 14 March 2020: state of alarm was declared. Lockdown.
- 11 May 2020: start of de-escalation in certain Autonomic Communities.
- 21 June 2020: end of state of alarm.
- 25 October 2020: start of second state of alarm.
- 9 May 2021: end of second state of alarm.
- 28 March 2022: end of quarantine positives with mild symptoms.

Likewise, to better contextualize the data, we must remember that Italy has a population of 59.55 million while the population of Spain is 47.35 million. In Italy, the under-14s make up 12.89% of the population and those over 64 make up 23.54% (Expansión, 2022). This is very similar to the data for Spain in which the under-14s make up 13.97% and those over 64 make up 20.09%.

2. Methodology

In this research with an international comparative focus, like that carried out by Van Aelst et al. (2021) or Mihelj, Kondor & Štětka (2022), linear television consumption in Spain and Italy is analysed. The choice of these two countries is because they were the European states most affected by the pandemic during the first weeks of the first wave and they belong to the same polarized and pluralist media system presented by Hallin & Mancini (2004), which equates them in their media systems and in the chronological events of the first phase of the health crisis.

The research also presents a diachronic perspective as, starting with an analysis of consumption prior to the pandemic (2019), it compares it with consumption during the lockdown (2020), with the following year when certain restrictions to mobility still existed and with 2022 when an obliged return to normality was imposed. In this way a picture is obtained of pre-pandemic consumption, of what occurred during the lockdown, and what persists after two years. This does not, then, mean offering a snapshot of this consumption, but rather the contribution of a broader, more in-depth study that analyses which practices have remained after a year immersed in the health crisis and to check whether linear television, thanks to the pandemic, has regained part of the hegemonic role it had decades ago.

Together with Internet, TV media was one of those that benefited most from the lockdown, as confirmed in earlier research (Arana Arrieta, Mimenza Castillo & Narbaiza Amillategi, 2020; Forteza Martínez, 2020; Montaña Blasco, Ollé Castellà & Lavilla Raso, 2020) and it was also the main source of information on the disease and the evolution of the pandemic in Spain (Silva-Torre, Martínez y Cuesta, 2022; Igartua, Ortega-Mohedano & Arcila-Calderón, 2020).

The selected methodology was exploratory and descriptive (Fieras Ceide, Túñez López & Vaz Álvarez, 2020) and quantitative-comparative. It must be underlined that this research on the impact of the pandemic on television is structured in two phases. In the first phase, the results of which are presented here, the linear consumption of television contents is analysed. In a later phase, digital consumption and what occurred with the OTT platforms will be studied. In this way a complete picture will be obtained of how the pandemic has affected audience behaviour in a hybrid media context at the present moment.

The research will be twofold. On the one hand the official audience data for both countries from 2019 to 2022 will be analysed in accordance with the following parameters which describe the behaviour of the television public:

a. Average consumption time
b. Daily cumulative audience
c. Generalist and theme channels with the highest viewer numbers
d. Most followed programs

These parameters are those traditionally used in the quantitative study of the television audience. In addition, these data will be compared so as to detect similarities and differences between the viewers of the two countries. The official sources used were, in the case of Spain, Barlovento Comunicación, GECA and Kantar Media, while for Italy they were Auditel, Censis, Geca Italia, Comscore-Sensemakers, together with those offered by the European Broadcasting Union and the European Audiovisual Observatory. In as far as those parameters allowed, the research focused on the comparison of viewer behaviour during the months of March, April, May and June of the years mentioned. This period was chosen as it corresponds to the toughest phase of the lockdown in 2020, and permits the diachronic assessment of potential changes in consumer dynamics. At all times, endeavours were made to choose comparable data so as to resolve the potential methodological differences on issues of audience measurement as applied by the two major multinational companies responsible in the two countries: Kantar Media (Spain) and Nielsen (Italy)[1].

3. Results

Next, we show the results grouped in accordance with the parameters described above.

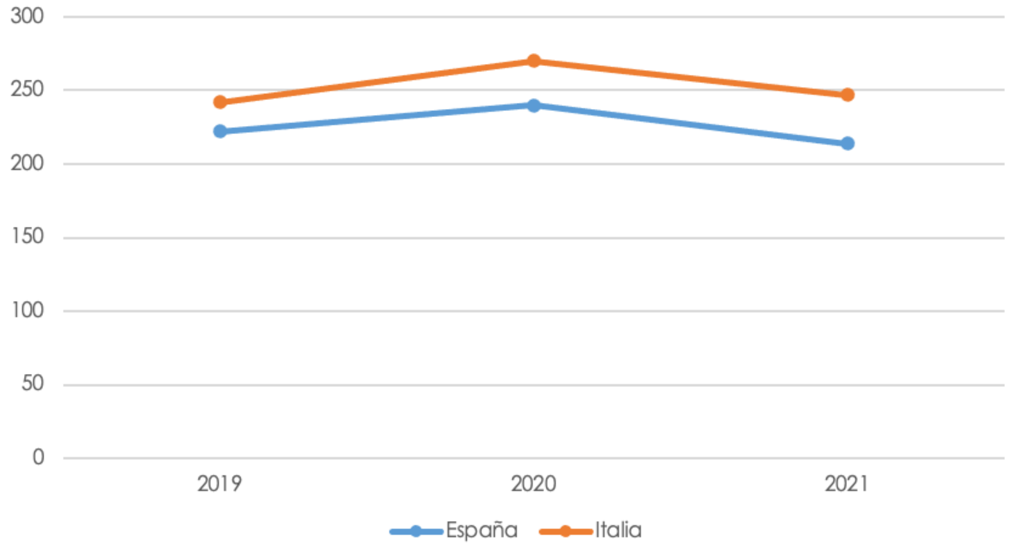
3.1. Average consumption time

The data indicate that in the two countries there is a trend towards rising consumption of linear television that goes back to previous years. As Graph 1 indicates, the year 2020 was an exception to this evolution due to the lockdown which triggered off consumption records in both countries. In Italy, for example, the peak of 376 minutes was registered at the end of March (Confindustria, 2021). In Spain, the record occurred on Sunday, 15 March, with 344 minutes per person per day (Barlovento, 2020a); this was the highest consumption ever in Spain since the beginning of audience measurement (Barlovento, 2020a). Given the limits on mobility in Spain, it was precisely in that year that ‘guest’ consumption, which had been measured since 2017 by Kantar Media, dropped to 5 minutes.

This period of seclusion meant that groups which were traditionally far-removed from the small screen and more accustomed to the digital media, such as children and young people, became attracted to television (González-Neira & Berrocal Santiago, 2020). In Spain, the 13-24 age group increase their consumption by almost 60% during the first two weeks of lockdown, while the average time for the youngest group (4-13) increased by 48%, according to the Kantar Media data. Initially, in the first few weeks, linear television consumption increased among all target groups, but it was also particularly relevant among those who traditionally watch the least television, that is, young people. If we compare the average consumption between 2019 and 2020, we find an increase of 15% in the 4 to 14-year-old group (from 211 to 239 minutes) and over 10% increase for the up-to-35 target group. Unquestionably, this was a perfect opportunity for some channels to foster the discovery of this media among social groups who were little accustomed to watching linear television. However, the Kantar Media data on consumption in Spain for the following year indicate that this was just a passing trend, as in 2021, the 4 to 12 age group reduce its consumption by 26% when compared to 2020, and the 13 to 24 age group consumption dropped 21%, reaching figures much lower than those for the year 2019. Linear television did not manage to capture these population groups. This decrease is common to other European countries according to the EBU data (2022).

In annual terms for 2020, all age groups increased their viewing in both countries. In Italy, the over-65 sector rolls up to 485 minutes; in Spain this was 387. Outstanding is the fact that for this age group in Italy the consumption time remained high in the following years, while in Spain it dropped slightly although this was the group that least reduced their linear consumption.

Graph 1: Average consumption time expressed in minutes



Source: Barlovento Comunicación (2019, 2000c, 2021) and Auditel. Prepared by the authors.

The lockdown also altered the traditional viewing timetables. In fact, the morning timeslot in Spain in March 2020 increased by 64.5%, and the afternoon and evening slots increased by over 40% (Barlovento, 2020a). Data from Kantar Media (2020) indicates that one of the groups with the greatest changes in their habits were children between the ages of four and 12, because, as they got up later, the viewer peak during breakfast time was delayed and consumption was higher throughout the day. The 18 to 30 age group also increased their viewing particularly during lunchtime and dinnertime, coinciding with the news bulletins. It is undeniable that the audience indexes reflect the social dynamics, as during this lockdown period there was a drop in audience numbers in holiday homes due to the restrictions on mobility together with the above-mentioned decline in 'guest' consumption, the numbers for which have been gathered by Kantar Media since 2017. In addition, an 8% increase in shared viewing has also been found. During the lockdown, there was a return to collective viewing combined with television socialization using Twitter, as, in March 2020, there was an increase in the social audience of over one and a half million users (González-Neira & Berrocal Santiago, 2020).

In Italy, during the initial phases of the pandemic and later during the lockdown, linear television consumption grew among all the target groups. Particularly worth mentioning is the growth of co-viewing, that is, shared viewing by family members within the home, parents (sometimes grandparents) and children. In fact, the Auditel data very precisely map shared viewing, which, in March 2020, increased by 12% in comparison with the same period the previous year. This was a considerable difference and showed that in Italian homes, at least once a day (mainly at peak viewing times), television became an instrument for family gatherings. The evening news bulletin was, for example, a clear moment for co-viewing: the Tg1 data recorded in 2020 (ratings which are also close to 10 million viewers, since the beginning of the pandemic) include children (a target that reached 20% of the share and young people (almost 30% of the quota). Another example of shared viewing was fiction. The most viewed title of the season in family groups, for example, was the series Doc. Nelle tue mani, with audience data which in 2020, were over 20% amongst children, reaching 30% among teenagers and much higher figures amongst adults (parents).

Also in spring 2020, apart from the news, what was outstanding was fiction and feature films (with 21.5% of the total time dedicated to TV), together with entertainment (26,7%). This latter figure is the most surprising because the production of most programs, during those weeks, was halted by the advent of the coronavirus, and most channels were forced to broadcast many re-runs. Nevertheless, in an attempt to forget the reality of the pandemic to a certain extent, even the repeats attracted a significant share of the audience. Suffice to remember, for example, the almost five million viewers of the entertainment program Ciao Darwin 8. Terre desolate on Saturday nights, or the almost four million watching the famous presenter Fiorello on Viva Raiplay, which was available for months on the Rai on-demand platform and had been frequently rerun.

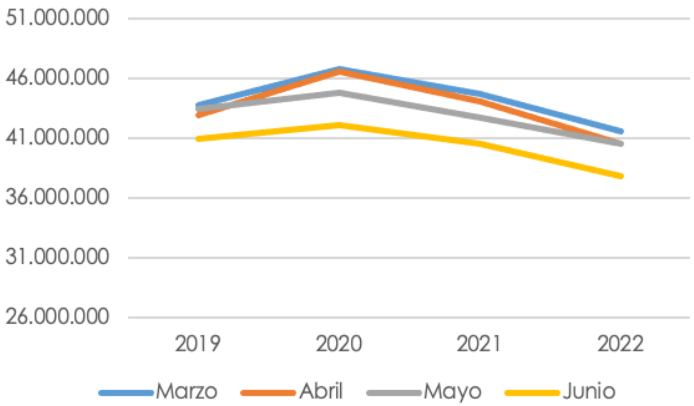
On this point, we must highlight the exception of Amici di Maria de Filippi which continued its production almost regularly during the months of lockdown. In fact, it closed the 2020 season with almost 5 million viewers and 22.8% share.

Continuing with this line of shared viewing, it must be noted that, as in Spain, social television messages were intensified during the spring of 2020. The increase was almost 90% in certain months (Scaglioni, 2021b).

3.2. Daily cumulative audience

In the case of Italy, we consider the period of the start of the pandemic (spring 2020) and compare it with the months of March, April, May and June of the previous year (2019) and after the lockdown (2021 and 2022). As can be seen in Graph 2, the effects of the pandemic were exhausted during spring 2020. Traditional television lost almost million viewers if we compare June 2020 with the same month in 2019. It is confirmed that the data for the months of March and April 2021 were higher than those of the same pre-pandemic period in 2019, meaning that the effects of the lockdown were still notable. However, in 2022 there has been a clear drop in comparison with previous years.

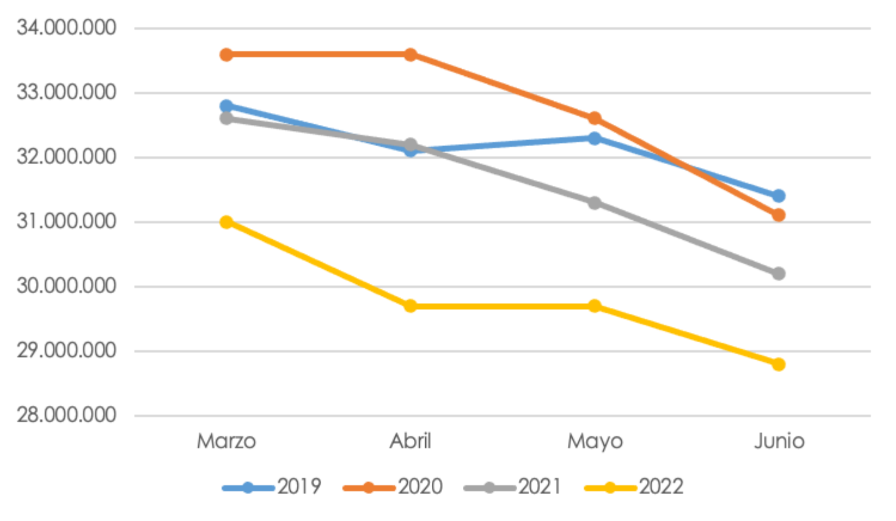
Graph 2: Average cumulative audience in Italy



Source: CeRTA with data from Auditel (2020)

On analysing this variable in the case of Spain, we also find the number of people in contact on a daily basis with the media has slowly decreased since 2019 (with the exception of 2020). If we compare the cumulative audience percentage of the first month analysed (March 2019) with the last (June 2022), a noticeable difference of 10%, that is, some 4 million people, is confirmed. As was found regarding viewing times, which have been commented earlier, the tendency going back to previous years continues.

Graph 3: Average cumulative audience in Spain (2019-2022)

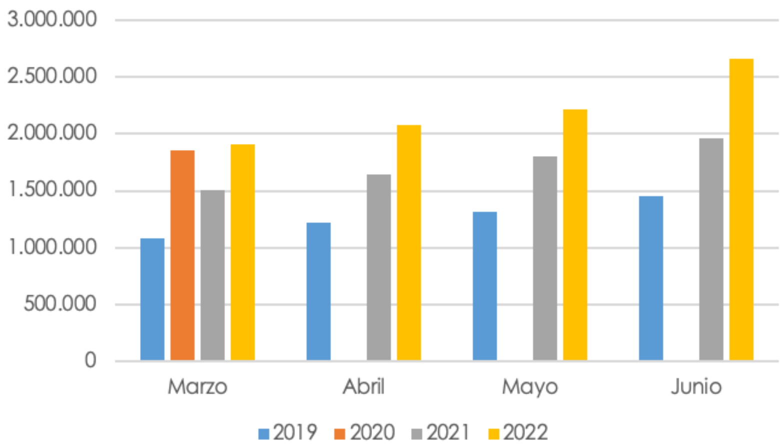


Source: Barlovento Comunicación (2019, 2020b, 2021, 2022). Prepared by the authors

Then again, we must insist on the fact that the audience behaviour in 2020 is anomalous, since, during the lockdown, the cumulative audience in these months is higher than the previous year (with the exception of 2020), as can be seen in Graph 3. In the case of Spain, the effects of lockdown are fewer in 2021 as the average audience is very similar to that of 2019.

Likewise, we must also highlight the data on "televisiophobes" (see Graph 4)[2], that is, the people who have not tuned in even one minute to television during the month in question. Inversely proportional to the data offered earlier, in Spain the figure has increased slowly during the period analysed year by year. This data is not available for Italy so a comparative analysis cannot be carried out.

Graph 4: Number of televisionphobes in Spain



Source: Barlovento Comunicación Barlovento Comunicación (2019, 2020b, 2021, 2022).

The difference between March 2019 and June 2022 is over twofold, as, compared to the 2.4% of televisionphobes (which at that time meant 1,087,000 individuals), in June 2022 this percentage had risen to 5.8 (that is, 2,658,000 people).

3.3. Generalist and theme channels with the highest viewer numbers

During the period analysed, in Italy there was scarcely any change in viewer preferences as Rai1 led the rankings in the three years studied, followed by Canale 5 as can be seen in Table 1. The pre-eminence of the first Italian public service network broadcaste is confirmed (Rai1, with the quota of between 16.4% in 2019 and 17.18% in 2021), as is that of the first private broadcaster (Canale 5, with a share of between 15.5% in 2019 and 15.39% in 2021).

Table 1: Italian generalist and theme channels with the highest audience share between 2019 and 2021

Years	Generalist		Theme	
	Channel	Share	Channel	Share
2019	Rai 1	16.35	Real Time	1.6
	Canale 5	15.48	Rai 4	1.36
	Rai 3	6.81	Rai Premium	1.28
	Rai 2	5.58	Iris	1.18
	Italia 1	4.86	Rai Yoyo	1.17
2020	Rai 1	16.46	Real Time	1.14
	Canale 5	15.03	Rai 4	1.38
	Rai 3	This .94	Rai Premium	1.27
	Rai 2	4.96	Iris	1.24
	Italia 1	4.76	Rai Movie	1.15
2021	Rai 1	17.18	Rai Premium	1.38
	Canale 5	15.39	Real Time	1.36
	Rai 3	17.19	Rai 4	1.32
	Rai 2	5.07	Iris	1.24
	Italia 1	4.35	Rai Movie	1.1

Source: Auditel. Prepared by the authors

On this point, a clear contrast can be appreciated with the Spanish media system in which the position of the public corporation is becoming ever more of minority interest. For years it has been facing an audience crisis, as can be seen in the data in Table 2. Even though it is based on a duopoly system unlike the Spanish one, it must be pointed out that in Italy the three public channels are among the four most viewed channels, and that the audience share of Rai1 is double that of La 1.

As regards the theme channels (Table 1), in the three years analysed the same preferences (except for the swing between Rai Yoyo and Rai Movie) are maintained, almost always in the same order. Once again, the Italian public corporation shows its strength as four of the five most viewed theme channels belong to the RAI group. It is notable that the audience shares for this type of channels in Spain are lower and none rises over 2%.

The preferences of the Spanish audiences also remain unchanged during this period, even during the anomalous year 2020 as shown in Table 2. Thus, this is the only parameter analysed that, in 2020, follows the trend of the years before and after. Accordingly, viewer loyalty to the different channels continues over these years. In the generalist channels, Telecinco keeps its lead, followed by Antena 3 and there is a steady decline of La 1 de TVE. Given that the research has concluded before the end of 2022, the data for this year are not included. Nevertheless, it must be pointed out that in the first seven months of 2022, there has been a major modification due to the change in leadership for the most viewed channel, which is now Antena 3, after 35 months of leadership by the main Mediaset channel (Tele 5).

Table 2: Spanish generalist and theme channels with the highest audience share between 2019 and 2021

Years	Generalist		Theme	
	Channel	Share	Channel	Share
2019	Telecinco	14.8	FDF	2.8
	Antena 3	11.7	Energy	2.4
	La 1	9.4	Neox	2.4
	La Sexta	7	Nova	2.2
	Cuatro	5.3	Divinity	1.9
2020	Telecinco	14.6	FDF	2.6
	Antena 3	11.8	Nova	2.5
	La 1	9.4	Energy	2.3
	La Sexta	7	Neox	2
	Cuatro	5.4	Divinity	1.9
2021	Telecinco	14.9	Nova	2.4
	Antena 3	13.8	FDF	2.4
	La 1	8.8	Energy	2.1
	La Sexta	6.4	Divinity	1.9
	Cuatro	5.3	Neox	1.8

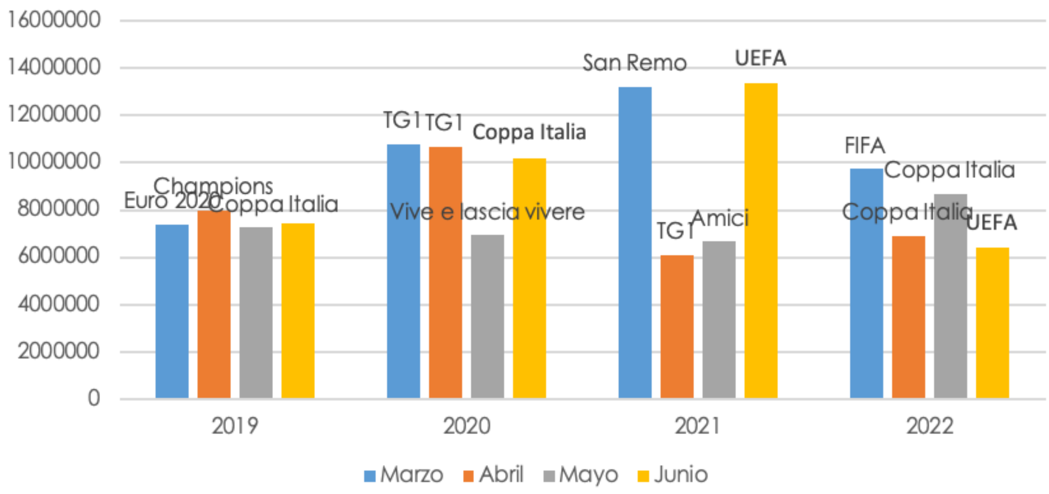
Source: Barlovento Comunicación (2019, 2020b, 2021, 2022). Prepared by the authors

As regards the theme channels, the Spanish audience also prefers the same channels although, on this occasion, the order has changed in some years because a one decimal point rise or fall has a major impact in this classification, as in the case of Neox. None of these channels belongs to the Spanish public broadcasting corporation.

3.4. Programs with the greatest following

On analysing the preferences of the Italian public for the programs with the greatest number of viewers during this period, we find that there is a certain continuity in all the years studied, independently of state of the pandemic. The most viewed broadcasts in the month of June were usually soccer matches. In 2019, 2021 and 2022, the five most viewed programs were soccer competitions, and even in 2020, a pandemic year, three of the five broadcasts also corresponded to the king of sports. For that matter, 2022 returned to the 2019 trend in that, among the most viewed programs in these four months, 50% were broadcasts of soccer matches. A similar trend can be seen in Spain during the same period as will be seen below. As Graph 5 shows, in the 16 months analysed, a football match was the most viewed program by far in Italy.

Graph 5: Programs most viewed in Italy (2019-2022)



Source: Auditel. Prepared by the authors

The results obtained from the analysis of the five most viewed programs each month indicate that, after the 2020 standstill, which we will detail below, the preferences of the Italians have changed very little compared to the pre-pandemic period. After soccer, Italian series were the second most preferred format. On this point, it must be underlined that they were all of national production such as Che Dio ci aiuti (Rai, 1, 2019), Mentre ero via (Rai 1, 2019), Doc - Nelle tue mani (Rai 1, 2020) with the exception of Leonard (Rai 1, 2021) and Il nome della rosa (Rai 1, 2019) which were co-productions. Thus, there is a clear predilection for Italian-made programs when compared to major international blockbusters, which is probably due to programming changes in view of the OTT offer that prioritizes foreign series.

Among the four, what stands out is the success of some fiction products which have been on Italian TV schedules for a very long time, such as Il Commissario Montalbano (Rai1, premiered in 1999), Don Matteo (Rai1, premiered in 2000), Un passo dal cielo i guardiani (Rai1, premiered in 2011), along with new series like Vivi e lascia vivere (Rai1, premiered in 2020).

Game shows, of different types, also appear in these classifications, in a minor way. Specifically, there is the continued success of Soliti ignoti il ritorno (Rai1, 2019, 2020, 2021, 2022) and the talent show Amici (Canale 5, 2021). In contrast with Spain, there are no reality shows in this classification, a point which shows a great difference in the preferences of the audiences in the two countries.

Although they are not habitual programs on the Italian schedule, there are two similar interconnected events which, between them, break the records for audience figures: the Festival de San Remo (Rai1, March 2021) with an audience share of 49.9% viewed by over 13 million people and the 2022 Eurovision Song Contest (Rai1), with 41.9% audience share and 6.590.000 viewers[3].

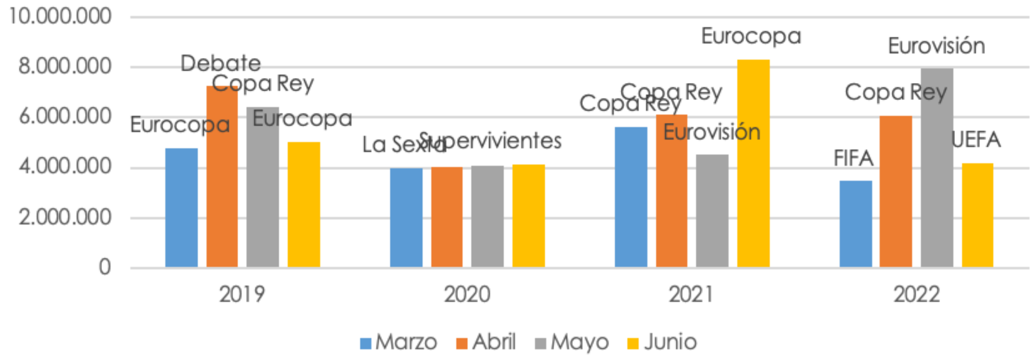
The data analysed lead to the conclusion that Italian television has a clear value as a tool for leisure and entertainment, over and above its news value. While in each of the years examined this classification includes at least three news programs (mainly TG1, Rai1, and TG5, Canale 5 on two occasions), the remainder of the most followed broadcasts correspond to entertainment programs (Italian series, sports and game shows).

Indisputably, the year 2020 breaks with this tendency for two reasons. On the one hand, because seven of the broadcasts most viewed during these months correspond to news programs with extraordinarily high consumption data due to the health crisis (TG1, March 9 2020, with over 10 million viewers and a 33.4% share; TG1 on March 28, over 9 million and a 31.3%; TG1 April 26 with 35.3% and over 10 million mean audience; TG1 May 14 with 24.2% and almost 7 million viewers; TG5 with 21.6% and over half a million, a similar figure to that of TG1 with 25.4%). On the other hand, 2020 is outstanding because of the occurrence of three religious programs among those most followed in April, coinciding with Holy Week (in contrast with what occurs in Spain). During the lockdown, Italian television, then, covered different needs from those that correspond to the period before and after the pandemic, as it complemented its usual entertainment role with another in keeping with the context experienced.

The predominance of the public service channel Rai1 was overwhelming and remained so during the period analysed, that is to say, the pandemic did not significantly alter preferences in this sense. Of the 20 programs most viewed in these months in 2019 and 2020, only one was not broadcast by Rai1, but by Mediaset's Canale 5. In 2021, this figure was three and in 2022 five programs by Canale 5. This characteristic is very different from the behaviour of the Spanish audience.

In the case of Spain, the state of the pandemic overwhelmingly determined and influenced the choice of the viewers. In the year before the pandemic, soccer matches (the Europa League and Copa del Rey), as is habitual in Spain (González-Neira & Quintas-Froufe, 2020), cornered the ranking of the most viewed programs in three of the four months analysed (March, May and June). In the month of April, however, the viewers opted for the electoral debate (on La 1 and on La Sexta) prior to the general elections (Quintas-Froufe, González-Neira & Conde-Vázquez, 2020).

Graph 6: Programs most viewed in Spain (2019-2022)



Source: Barlovento Comunicación (2019, 2020b, 2021, 2022). Prepared by the authors

In the year 2020, there was a clear change in the preferences of the Spanish audience compared to the previous year as the reality shows (more specifically Supervivientes de Telecinco) became the star as they were the most viewed format in the months studied. Moreover, only three of the most viewed programs in the year were not reality shows. These three were news programs (La Sexta Noticias, Telediario Fin de semana 2) and two of them were broadcast the day that the state of alarm was declared in Spain (March 14 2020). Consequently, the predominance of Telecinco was absolute as 15 of the 20 most viewed programs in Spain were transmitted on this channel.

The following year, the Spanish audience again opted for sports programs, specifically for soccer match broadcasts which were the most viewed programs in three of the four months studied. Outstanding is the month of June during which all the most viewed programs were soccer matches. As in the case of Italy, the month of June is usually dominated by the beautiful game.

In 2021, what stands out is the almost complete absence of reality shows on the lists of the most viewed programs as only one Supervivientes show managed to be placed amongst the 20 most viewed programs of the year. Consequently, Telecinco, which had strongly dominated the previous year, almost disappeared from the listings as it only managed to place Supervivientes (3,645,000 viewers) and the documentary reality show Rocío, contar la verdad (4,030,000). News bulletins took over the preferences of the audiences. In 2021, Spaniards' interest in news (specifically Antena 3 prime time news bulletin) must be stressed, as it appears five times among the most viewed programs with audience figures which go from 3,290,000 (22.9% on March 11) to 3,904,000 (22.7%, on March 8). For this year we must also mention the presence of the program El hormiguero which managed to be placed on this list due to the presence on its set of José Luis Martínez Almeida (March 2) and Felipe González (May 20), both politicians.

After an analysis of the data for 2020, it can be observed that the Spanish audience was divided mainly into two types of content: soccer and news. Soccer match broadcasts occupy 11 of the 20 positions in the ranking of the most viewed programs, while news bulletins appeared seven times on this list. It must be noted that the month of March was fully dominated by the evening news bulletins on Antena 3 (Noticias 2) with audience shares that fluctuated between 21.6 and 23%. Worth underlining is the fact that for the first time in the period analysed a non-soccer sports program (Mutua Madrid Open 2022 tennis match) was one of the programs most viewed during the month of May.

Another program that gathered much of the Spanish audience (between 34 and 60% of the share) in the years it was transmitted (2019, 2021 and 2022) was the Eurovision Song Contest. This choice coincides with the preferences of the Italian public.

In addition, what stands out is the absence of fiction series in this classification, in contrast with the options shown by the Italian audience due probably to the competition offered by the OTT.

3.4.1 Minority programs

Stemming from the previous section, we believe it is necessary to further examine how television approached the new demands of the viewers during the 2020 lockdown. Television became a window onto the world outside that attempted to address not only the need for news in a crisis situation, but also the leisure needs that could not be covered during confinement. Together with the above-mentioned most viewed programs, worth mentioning are those other traditionally minority public service programs that increased their audience share or those that appeared to cover new needs during the lockdown (e.g., remote learning or physical exercise), which were mainly launched by the public channels following their mandate.

As has been commented, very striking is the importance of religious programs in the case of Italy, as in April 2020, three of the most viewed programs corresponded to transmissions on Holy Week. Moreover, the 7am mass on Rai 1 was followed by over a million viewers (22% share). Even in March, the Urbi et Orbi Benediction from an empty Saint Peter's Square was watched by 17.5 million Italians on the Rai. In addition, as it was broadcast by various channels, is reached record data of almost 27 million people who saw fragments of this broadcast. These are, undoubtedly, extraordinarily high figures for the Italian public.

In the case of Spain, the Sunday mass broadcast during the lockdown increased its audience notably and the transmission on 15 March 2020 on La 2 was seen by 1.1 million viewers (13.6%), compared to half a million the previous week. Thus, the figures for this program were double the average which was between 400,000 and 500,000 viewers. Together with the gameshow Saber y Ganar, it was one of the star broadcasts on TVE's second channel.

The lockdown also gave great importance to the remote learning programs launched by the channels following their public service obligation. The program Aprendemos en casa in its different versions by age was the most viewed program on Clan (from March 23 to April 2 2020), although it was not as successful in its broadcast for teenagers on La 2. Real Mom on Boing reached figures 55% higher than the average for the channel during the same period (Geca, 2020). Likewise, other cases of this type of programs broadcast by autonomic channels were notable, but are outside the remit of this work.

Outstanding among the programs launched during the lockdown, was the success of Múevete en casa (La 2), on at-home exercise. It became one of the great triumphs of this channel up to June, as is achieved 6.4% audience share, meaning almost 200,000 viewers, undoubtedly a very positive datum which doubles the channel average. It is an example of public service content, over and above the usual television programming, which was very welcome during that time.

4. Discussion and conclusions

The analysis carried out allows us to confirm that the media consumption during the first phase of the pandemic was of an exceptional nature in the evolution of television in the two countries. In 2020, television recovered its original three functions of educating, informing and entertaining due to the extraordinary situation experienced. During these first months of lockdown, information was crucial to understand the advances of the pandemic and the measures taken by the authorities, which meant a reconnection with the sector of the public who were most removed from news (Casero-Ripollés, 2020). In fact, among the 25 most viewed broadcasts in Spain in 2020 were three news bulletins, although there was only one in 2019. Education, regarding both science and healthcare, was included in important television programs and introduced new, previously unknown terms into our usual vocabulary, such as PCR, antigens, close contact or aerosols. In addition, in such a complex and tense situation, people felt the need for evasion, for entertainment that would distract them from the stark reality. This shows, then, that in times of crisis the traditional media of television strengthens its leadership role. However, once this period of seclusion was over, entertainment television (soccer, the success in Italy of national fiction series) took precedence and, less often, the news also did.

The differences in the audience preferences respond more to structural reasons in each country and not to the impact that the health crisis had among the people in the two states. The pandemic accelerated a series of trends which had already been occurring in the television context before 2020. In fact, after the impasse of the lockdown, scarcely any changes were noted in the disengagement with the linear television media, particularly among the younger generations. The continuing drop in viewer minutes and in the cumulative mean audience has continued in the two countries both in 2021 and, more markedly, in 2022. The data show that after the lockdown, linear television could not maintain the figures for younger publics who had become interested during the months of confinement. This is an international trend, as shown by the EBU data (2022). To this situation must be added the high penetration of the OTT, particularly among the younger population sectors.

Another of the pre-pandemic trends confirmed is the different following of the public service channels in the two countries. The progressive decline of La 1 continues compared to the strength of the Rai1 in Italy, which maintains its position as the most viewed channel. The disaffection of the audience with the Spanish public service channel is becoming greater and greater, as is reflected in the consumption data, and contrasts with the leading position of the Italian channel.

With reference to the preferences of the public, in both countries soccer match broadcasts are leaders in the majority of classifications. Also outstanding is the lead position of Supervivientes in Spain in 2019 and, above all, in 2020 and the decreases it suffered beginning in 2021. It is worth stressing that this format was not among the main preferences of the Italian public during the months analysed. Compared to the continuity of the most followed programs in Italy, in Spain there is a change between reality shows and news programs caused perhaps by the saturation of Mediaset España programming. Greater prominence is found for news television in 2022, as, of the 20 broadcasts most followed in Spain during the period studied, seven were news programs and there were no reality shows.

Compared to other types of more atemporal consumption offered by OTT, linear television continues to triumph in the offer of live broadcasts. That is to say, formats linked to the present, to immediacy, are those that ensure much of the success of linear channels in the two countries. This is so for sports, mainly soccer, news bulletins, reality shows or events like the Eurovision Song Contest or the Festival of San Remo. In this way, during the first months of the health crisis, television broadcasting reached record audiences. This link with the present, with what is live, is clearly a fundamental feature for the coexistence of linear television with other types of consumption.

Without a doubt, this picture needs to be completed with digital consumption, which will be addressed in a second phase of this research, in order to globally understand whether there has been a transfer of audiences within this hybrid context and whether the pandemic accelerated digital consumption. However, with the data available at present we can state that linear television maintains a rock-solid position in the current media ecosystem.

For future research lines, the results here presented should be a good basis for the above-mentioned research on the digital consumption of television channels and OTT which could offer a clear picture of their evolution over these years. Likewise, emphasis must be laid on the consumption on mobile devices and on the potential differences between the two countries, together with the novel uses of the TV set. In a hybrid system, it is fundamental to take the digital audience into account to address reality, particularly as concerns the audiovisual consumption of the youngest age groups. In short, in view of the data analysed, our conclusion is that the pandemic did not introduce new dynamics but rather accelerated pre-existing trends in the two countries.

5. Contributions

Contributions	Authors
Planning and design of the work	Author 1, Author 2
Documentary search	Author 1
Data gathering	Author 1, Author 2, Author 3
Analysis and critical interpretation of data	Author 1, Author 2, Author 3
Revision and approval of versions	Author 1, Author 2, Author 3

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Notes

[1] For some parameters, the 2022 data are not available as the research has not finished before the end of the year.

[2] Some of the data for the year 2020 are not available in published reports.

[3] However, we must state the comparison regarding the Festival of San Remo in the different years could not be carried out as it is usually held in February, which is outside the remit of this analysis.