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QUADERNS DEL CAC

OTT, new frontiers and challenges



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Introduction

We present the latest issue of *Quaderns del CAC*, which explores the phenomenon of Over-the-top or OTT audiovisual services. This label covers audiovisual services that provide television and video content accessible directly via the internet and includes a wide range of diverse activities such as simply streaming the signal of a standard TV channel in parallel to its usual distribution, access to already broadcast programmes or “catch-up” TV, *a la carte* or on-demand access and also repositories of films, TV programmes, user-generated and mixed content, online TV channels, video blogs and video-based social media.

This multiplicity of content accessible online via any device with a screen and internet connection has brought about many different forms consumption and opened the door to new activities by both traditional providers and the new players entering the market, of all sizes: from large conglomerates to initiatives by communities, interest groups and even individuals. The changes resulting from such practices are altering the value chain for audiovisuals, as well as how audiences are measured and content accessed and monetised.

These and other aspects, in their most global or specific forms, are present in the texts that make up this issue. To start, in *Strategies and regulations of OTT: lessons from the US (2005-2015)* **Vincent Bullich** and **Thomas Guignard** use the experience of the most mature OTT market, namely the US, to explore the dimension of strategic changes for the whole of the audiovisual sector, be it in production or in the consumption of content that lies at the heart of the system. They note the growth in OTT at the same time as identifying its particular features, such as the strategic value of Big Data and original content, and wonder about new potential advertising sources. The authors also discuss the challenges resulting from this new scenario for regulations originally designed for lineal television, whose health, by the way, they confirm. In her work entitled *OTT platforms distributing media content: a threat for the free-to-air TV duopoly in Spain?*, **Marta Albújar Villarrubia** analyses the distinct characteristics of the hyper-concentrated Spanish market and its impact on the prospects of implementing OTT services, also comparing this with the key features of the system implemented in the United States. **Idoia Portilla** and **Mercedes Medina**, in *Monetization strategies and audience data in online video. The case of Atresmedia*, study the practices of a communication group by focusing on its need to monetise the content it provides online and the audience data required to achieve this. The study by **Pablo Gómez-Domínguez** and **Reinald Besalú Casademont**, entitled *Social and mobile TV in Catalonia. Audience and interaction in Catalan TV broadcasters' corporate mobile apps and social networks' profiles*, provides an analysis of one of the most marked changes in TV's relationship with the internet, namely social television, and explore the case of Catalonia, illustrating the mechanisms in place for participation and the role of the mobile phone in this process. Finally, in *Opera's audiovisual strategy on the internet: towards a search for new media audiences*, **Isabel Villanueva Benito** explains to what extent the need for content lies at the centre of the relationship between audiovisuals and the internet and how this demand gives an artistic discipline which, to date, had been limited to restricted circuits, the chance to circulate globally.

In the article section, **Carlos López-Olano** in *Developments in the legal framework of Radiotelevisió Valenciana (RTVV). Future prospects*, analyses the legal framework of a television experience at the level of autonomous community that was “liquidated” by political powers, offering a series of conclusions to bear in mind to avoid repeating former mistakes. **Matilde Delgado**, **Belén Monclús** and **Sheila Guerrero**, in *Reality TV as an experimental laboratory for new forms to integrate advertising within generalist DTT channels in Spain*, discuss the growth in new types of advertising appearing in Spanish programming and the different ways used to insert advertising, resulting in programming with dispersed advertising, also exploring reality TV as fertile ground for experimentation.

Emili Prado
Director

OTT strategies and regulations: lessons from the US (2005-2015)

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Abstract

The arrival of the internet on the home TV set has allowed new players to enter the audiovisual industry and new services to be implemented, resulting in major changes over the last few years. The first is unserialising, offering viewers a new way to interact with content and thereby breaking with the traditional flow to allow a potentially "active" and personalised consumption. The second relates to the content supplied, which is no longer the exclusive domain of traditional broadcasters but is now likely to be open to all content or service publishers, thereby increasing competition, especially with OTT services. Consequently, this new landscape involves two outcomes: new uses and related practices and a change in the value chain, rooted in actual change brought about and the hopes and fears aroused by these services. Beyond the restructuring of relations between actors in the enlarged sector, this analysis highlights a number of key issues: regulatory conditions, the location and funding of content, methods used to value content production and the developing influence of data. The boom and fragmentation of supply also lead to another issue: the individualisation of practices. Although it is highly premature to assess the impact of these OTT players, their growing popularity in the United States is poised to transform the audiovisual sector. At first glance, the established players seem significantly weakened by ambitious new entrants; however, they have undeniable advantages and, as yet, there are no sure signs of disruption. TV still has a strong place in the American media landscape.

Keywords

Internet Television, Over-the-top Services, Industrial Strategies, Regulation, Data.

Resum

L'arribada d'internet al món de la televisió ha permès l'entrada de nous actors a la indústria audiovisual i la implementació de nous serveis; una situació que ha comportat canvis importants en els últims anys. El primer d'aquests canvis és el que anomenem deserialització, que ofereix a l'espectador una nova manera d'interactuar amb el contingut i trenca, així, amb la lògica de flux per fomentar un consum potencialment actiu i personalitzat. El segon canvi està relacionat amb l'oferta de contingut, que deixa de ser de domini exclusiu de l'organisme de radiodifusió tradicional i passa a estar oberta a tots els editors de contingut o serveis; això, alhora, fa que augmenti la competència, especialment amb els serveis de lliure transmissió o over-the-top (OTT). Com a conseqüència, aquest nou panorama ens porta dues promeses: la renovació dels usos i les pràctiques relacionades i un canvi en la cadena de valor que té l'origen en el canvi efectiu, les esperances i les pors generats per aquests serveis. A banda de la reestructuració de les relacions entre els actors del sector ampliat, aquesta anàlisi destaca una sèrie de qüestions clau: les condicions reguladores, el lloc i el finançament dels continguts, els mètodes de valoració de la producció i l'evolució de la influència de les dades. D'altra banda, l'auge i la fragmentació de l'oferta han donat lloc a un altre fenomen: la individualització de les pràctiques. Tot i que és molt aviat per avaluar l'impacte d'aquests actors OTT, la creixent popularitat que han adquirit als Estats Units està a punt de fer que ens replantegem de dalt a baix el sector audiovisual. A primer cop d'ull, sembla que els actors establerts han quedat bastant debilitats pels ambiciosos nous entrants; ara bé, tenen avantatges innegables i encara no podem parlar d'alteració. La televisió encara té un paper important en el panorama dels mitjans de comunicació nord-americans.

Paraules clau

Televisió per internet, serveis de lliure transmissió, OTT, estratègies de la indústria, normativa, dades.

Introduction

Since 2005, when the first video was broadcast on YouTube, over-the-top (OTT) audiovisual services have continued to multiply and very quickly, leading to constant questions regarding the structural transformation of the audiovisual industry due to the strategies and distribution of these new forms of content. Notably, this issue had already been announced the previous year in an important book published under the title *Internet Television*.¹ The authors of this book state that this structural transformation was inevitable and expected to appear due to the technical arrangements for content distribution, changes in programming and associated viewing practices, methods of production and the form of content, business models funding this production and, finally, concomitant political and legal framework (Noam, Groeble & Gerbarg 2004). While covering many aspects with foresight and astuteness, the authors certainly didn't anticipate the huge success of new entrants, epitomised by YouTube and Netflix. Yet, over the past decade, it is these very players that have laid the foundations for a new configuration of the audiovisual sector as a whole.

This article therefore aims to provide a summary review of the development of these OTT services based on a study of these actors' strategies in the most advanced country in this area: the United States. Our article does not claim to be an exhaustive analysis of all aspects of the audiovisual sector affected by the new services. We will focus on three aspects that seem crucial to understanding the ongoing mutations: the strategies used to obtain content, data as a new industrial and commercial asset, and the complex adaptations of regulations and legal framework for these services. These three parts will be preceded by a summary of the key OTT services and an overview of their influence on the US market. In conclusion, we'll explain a concept represented by these OTT services which has been central, for the last thirty years, to discussions on the development of audiovisual and telecom industries: convergence.

1. A typology of audiovisual OTT services

The convergence of the audiovisual and digital industries (consumer electronics, telecommunications, computer, software and internet) has been fuelled by dynamics based on the interconnection of the sectors concerned, which tends to form a system. In this respect, the rise of OTT services is closely related to major technical breakthroughs in consumer electronics and the increase in network capabilities in terms of speed (especially for video services).

A. OTT services, a new paradigm in the audiovisual sector

To avoid being confined to a technical approach focusing on distribution protocols (Internet TV, IPVOD ...), our study will be

based on a distinction between two key terms: "managed" video services provided on the internet by network operators (often grouped under the term IPTV) and OTT (Over-the-top) services which are available on the open internet. The distribution of video services has long been and continues to be largely the preserve of managed networks (analogue and digital terrestrial broadcasting, satellite, cable, ADSL and now FTTx) in which the operator guarantees a certain level of service. Some of these network operators (cable and telecommunications operators) also provide the commercial distribution of services. Managed networks have a number of advantages for video distribution: a controlled quality of service, the capacity to bill for services and customer technical support.

This established situation is being challenged by the rise in on-demand consumption in various forms (paid and free) and the development of new online services, particularly in the United States. Managed video services are being rivalled by another category called OTT (Over-the-top TV or Over-the-top content) which refers to television distributed on the open internet, regardless of the technology used. As the name suggests, OTT services come "on top" of existing transmission infrastructures using telephone networks, wireless networks or bandwidth. In other words, OTT services do not control the network and do not have to pay for its development and maintenance, but use it to deliver their services.

Unlike managed video services, there is no dedicated network or infrastructure provided by network managers. It seems important to note that the traditional television channels and network operators also offer OTT services in addition to their main business. However, they no longer appear as key intermediaries and are being directly challenged by new entrants with a position focused on OTT services. The latter, whose business is based on an editorialised catalogue and which provide a set of content services (notably arrangement and selection), lie at the heart of this study. Under their influence, new opportunities for to create and capture value but also to destroy value are emerging (Gabszewicz & Sonnac 2013). Indeed, the spread of OTT services supports the hypothesis that the internet's arrival in the field of television will gradually sweep away divisions in the audiovisual industry and the traditional market organisation.

The different functions carried out by OTT service providers vary greatly. While some appear primarily as an intermediary, linking different categories of providers, others, in order to distinguish themselves from the existing offer, flood the upstream side by producing their own content. These audiovisual OTT services are structured around four main integrated functions: the creation and production of content; the accumulation and distribution of content; network management; the production of devices and connection options.

These services are also structured around 3 main business models:

- Subscription (SVOD) such as Netflix and Amazon Prime Video
- Buying and renting such as Google Play Film, Vudu and iTunes

- The sale of advertising space such as YouTube and catch-up TV from large national channels (a particularly significant phenomenon in Europe).

A hybridisation of economic models has also appeared, as evidenced by Hulu's proposal, comprising a free offer financed by advertising and a premium offer (Hulu Plus), giving access to more ad-free HD content via subscription. The launch of the paid subscription plan, YouTube Red, also illustrates this trend.

B. The undeniable rise of OTT services

The number of pay-TV service subscribers in the US fell for the first time in the second quarter of 2010. A study on connected TV (Girieux & Fountain 2010) underlined the phenomenon of "cord-cutting", which means cancelling a pay-TV subscription to replace it with an OTT video service, a growing phenomenon especially among young consumers. According to a Nielsen USA study, teens and young adults are spending far fewer hours watching "traditional" TV every week than they were just four years ago while there is growth in OTT services, with attractive offers customised for young Americans. The drop is steepest among 12 to 17-year-olds: in 2011 they were watching about 25 hours of live TV a week whereas in 2015 they only watched 15 (*Business Insider* 2015).

In 2015, 181.0 million people in the US watched videos via an app or website that streams content over the internet and bypasses traditional distribution channels, according to eMarketer's study of OTT video viewership. Among the OTT services listed, we find Netflix, Amazon and Hulu but also YouTube, accessible to almost all Americans. 7 out of 10 American internet users watch OTT video services according

to an eMarketer study (see Figure 1). According to forecasts from the same study, this number will be around 200 million in 2019, namely 72% of US internet users and 89% of users consuming video online. After YouTube, used by 94% of video viewers, Netflix is the most powerful service with a penetration rate of 63% in 2015, forecast to be 72% by 2019. Amazon and Hulu's penetration rates are also on the rise, 36% and 33% in 2015 respectively with an annual growth rate of 2% over the next 4 years based on this study.

C. The still influential linear TV in the US market

However, our analysis shows that the threat posed by online TV for traditional channels should not be overestimated. OTT video providers (like Netflix) may represent an extra option or a one-off substitute to linear TV; nevertheless, this is not a complete alternative to the broadcast stream. Channels have great assets to withstand the arrival of online content on TV: the strength of their premium programmes and of their media brands, the power of prime time and live events and their ability to retain audience loyalty to daily or weekly programmes (series, TV news, reality shows, etc.). The following table demonstrates the continuing importance of television in American media space.

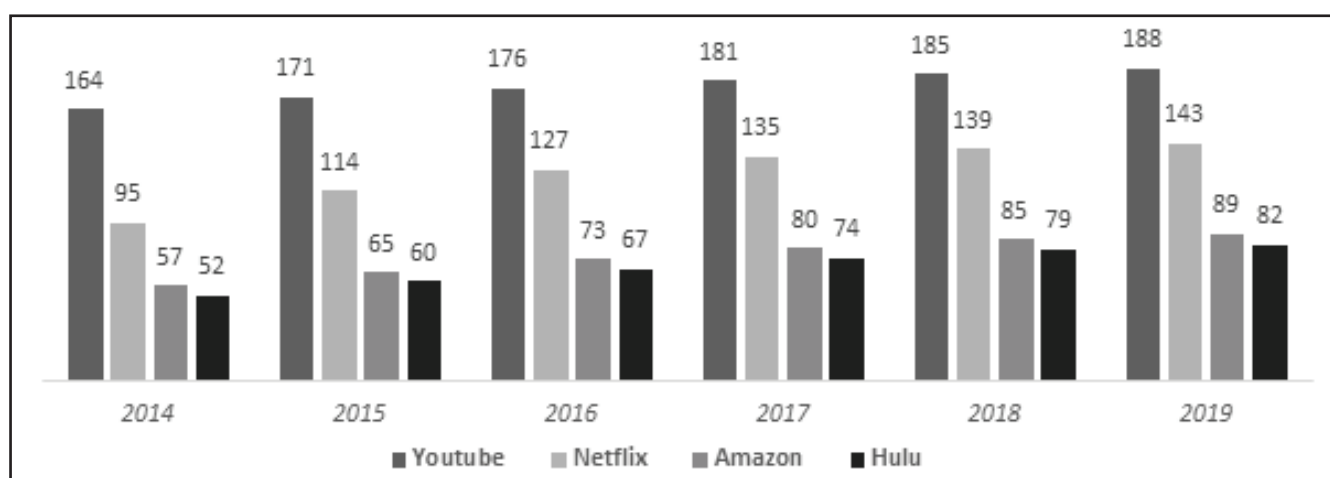
We can see that, despite the proliferation of media platforms, television remains by far the reference media in the United States. Although the time spent on mobile media consumption has increased in recent years (+ 97% in 2011, + 91% in 2012, +53% in 2013, +16% in 2014), daily TV consumption is still much greater: in 2015, Americans spent 26 minutes a day watching videos on mobiles compared with a daily "traditional" television consumption of 4 hours and 11 minutes.

In addition, these new audiovisual consumption patterns may

Figure 1. US Over-the-top (OTT Video Service Users, by Service Provider. 2014-2019

OTT video service users (millions) - 2016-2019 (forecast)

Users ≠ subscribers



Note: individuals of any age who watch video via any app or website at least once per month streams video content over the internet and bypasses traditional distribution channels.

Source: eMarketer. October 2015

Figure 2. Average time spent per day with major media by US Adults. 2011-2017

hrs:mins - 2016-2019 (forecast)

	2011	2012	2013	2014	2015	2016	2017
DIGITAL	3:34	4:10	4:48	5:09	5:29	5:45	5:56
Mobile (nonvoice)	0:46	1:28	2:15	2:37	2:54	3:08	3:18
Radio	0:16	0:26	0:32	0:39	0:44	0:49	0:52
Social networks	0:04	0:09	0:18	0:23	0:27	0:30	0:32
Video	0:03	0:09	0:17	0:22	0:26	0:29	0:32
Other	0:23	0:44	1:08	1:14	1:17	1:20	1:22
Desktop / laptop*	2:30	2:24	2:16	2:14	2:12	2:11	2:10
Video	0:12	0:20	0:22	0:23	0:24	0:25	0:25
Social networks	0:21	0:22	0:17	0:16	0:15	0:14	0:13
Radio	0:12	0:07	0:06	0:06	0:06	0:06	0:06
Other	1:45	1:35	1:31	1:28	1:27	1:26	1:25
Other connected devices	0:18	0:18	0:17	0:19	0:23	0:26	0:28
TV**	4:34	4:38	4:31	4:22	4:11	4:03	3:58
RADIO**	1:34	1:32	1:30	1:28	1:27	1:25	1:24
PRINT**	0:46	0:40	0:35	0:32	0:30	0:28	0:27
OTHER	0:39	0:38	0:31	0:26	0:24	0:22	0:21
TOTAL	11:08	11:39	11:55	11:57	12:00	12:04	12:05

Note: age 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking: for example, 1 hour of multitasking on desktop/laptop while watching TV is counted as 1 hour for TV and 1 hour for desktop/laptop

* includes all internet activities on desktop and laptop computers

** excludes digital.

Source: eMarketer. October 2015.

also represent new opportunities for traditional TV channels that seek to promote their “brand equity” (largely related to their program selection and prescription) and programs by developing their distribution across all portals and platforms used by new entrants. Unlike pure OTT players, broadcasters generally view their presence on the internet as a complementary service to their core business. With this in mind, the flow model (linear) remains central in the television experience. They seek above all to adapt to the new consumption patterns of viewers (delinearisation, generalisation of multi-tasking and multi-screening activities) and thus retain their audience while supporting the linear consumption of the broadcast stream. OTT services therefore appear as a means to improve the television experience with “interactive” complementary content and services, thereby generating additional revenue through pay-VoD, affiliation, e-commerce, or via new advertising inserts within interfaces and catch-up TV services.

The development of “cord-cutting”, a consensual term in the American media, should also be put into perspective. Network managers have lost subscribers but this decline is still limited. On the other hand, cable operators like Comcast are implementing strategies to limit the use of OTT services such as Netflix and YouTube by applying additional charges for larger consumers. The implementation of this system in early 2016

shows that network managers still have an essential position within the sector. OTT services are still largely dependent on the performance of distribution networks and the balance of power has yet to be reversed, as shown by the market capitalisation of Netflix (42 billion USD) in early 2016, which is still far from the first US cable network, Comcast (145 billion USD).

However, it is undeniable that a fundamental trend has begun and the aim to contain the spread of flagship OTT players does not seem tenable in the long term. Moreover, since the second quarter of 2015, Comcast has been facing a change in the nature of its subscriptions: the number of people subscribing only to the company's internet access service exceeded its pay-TV subscribers for the first time in the second quarter of 2015 (Rosoff 2015).

2. Three ideal-typical strategies in the “race to content”

Exclusive content is the prerequisite to the economic viability of pay-TV (Sonnac 2011). Initially OTT services, specifically those relating to Video on Demand, tended to have more similarities than differences in terms of their catalogues. Indeed, at first most content owners made the choice to offer their programs on the majority of distribution platforms to ensure their presence

on popular platforms. However, it is evident that strategies to differentiate content have been implemented since the third quarter of 2010. Traditional audiovisual players who initially opened up their catalogues have now become more reluctant to share their content.

Many traditional players have also chosen to broadcast their own channel and content on the internet : for example, ABC, CBS and NBC refused to join the Google TV program in late 2010 (as well as Apple TV program for NBC) preferring to reserve their content for their Hulu and Hulu + platforms; similarly, at the same time cable and satellite stations threatened by the arrival of new services launched into proprietary deals based on exclusive programs (e.g. HBO Go, Xfinity Online by Comcast and the satellite operator DISH); Finally, audiovisual and film production studios have joined forces to create their own OTT services –Hulu, Hulu+ and Epix– accessible from several set-top boxes and platforms (e.g. Netflix). These content producers share the same strategy based, firstly, on building up a common catalogue to create a decisive critical mass in order to negotiate with broadcasters and, secondly, on the production of their own OTT service accessible from different devices (e.g. streaming devices like Roku or channel and services packages provided by cable operators).

This race for exclusivity has resulted in content players tightening up intellectual property rights. That's why we have recently observed an increase in litigation and legal proceedings in the US between content broadcasters on the internet and copyright holders regarding a key issue: do the rights acquired by broadcasters on one type of network give them the right to deliver the content via alternative broadcasting services (Durand, 2011)? In this respect, the claim of content producers was clear: the rights acquired by paid-TV players and those used for streaming should be separate markets. The fears expressed by an FCC manager at the start of IPTV regarding the role of intellectual property rights as a barrier to entry, holding back innovation in broadcasting (Pepper, 2004), have resurfaced in the American media as OTT audiovisual services have developed. Because content represents a resource that is fiercely negotiated by the producers, OTT players have developed three main strategies to get around this problem, at least in part: (a) the acquisition of broadcasting rights related to a large back catalogue, (b) an organisation “platform” (or “marketplace”) to promote the use of “alternative” content (Pro-Am & User Generated Content) and (c) the financing of in-house content production.

A. Acquiring broadcasting rights

Initially, OTT players had two main types of strategy in the “content race”, perfectly illustrated by the paragons of the sector, namely Netflix and YouTube. These two types of positioning for content can easily be related to these players’ core activities. Consequently the Netflix Company, originally offering a DVD home delivery service, continued its activity but gradually abandoned the offline service to focus on OTT. From 2007 the

Los Gatos firm, in addition to sending DVDs by mail, which had formed the core of its business since it was set up in 1998, provided a Video on Demand service from its own website. The challenge is therefore to provide a catalogue able to encourage customers to migrate from the “offline” to the “digital” service while maintaining a monthly subscription model that had been set up by the firm in 1999.² To do this, the strategy adopted was catalogue completeness.

Owing to an efficient information system that recorded its subscribers, the company realised that the emergence of a viewing practice that would subsequently be called “binge watching” (or “binge viewing”) was an important trend. This consists of continuously viewing episodes from the same series and has led to a growing demand in the rental of boxset DVDs containing the entire season of a television series. Netflix therefore purchased broadcasting rights for the entire season of different series from the back catalogues of major national networks and American cable operators. The company also established distribution contracts with English producers offering hit shows on the other side of the Atlantic. The major issue is to provide the most extensive catalogue to make up for a lack of premium content. This strategy of providing the widest catalogue in order to attract and retain audience is implemented by a firm like Vudu. Much like Netflix, this company is not affiliated with any major audiovisual player or present in any other activity likely to compete with these players; Vudu is pursuing the same completeness strategy by proposing a number of references that is significantly larger than its counterparts and by building on a “long tail” effect (Anderson, 2004) to monetise its rights acquisitions. So this first ideal type illustrated by Netflix is an offshoot of an organisational and business model already identified in studies on cable or satellite³. Indeed, notwithstanding the sophisticated recommendation systems, the “Netflix model” has a traditional production line (initially at least), purchasing broadcasting rights from content producers and funding production via the final consumer thanks to subscription fees.

B. The “platform” model

The second ideal type is the “YouTube” model (which can be found, for example, in its direct competitor Dailymotion). This model appears to be more innovative. Indeed, we are faced with an organisational and promotional model of a many-sided market some economists call “model platforms” (Evans et al 2007; Gawer 2009). The core of the activity of a company like YouTube is intermediation: it does not acquire broadcast rights to show content but aims to become an essential intermediary for content producers who will willingly offer their products on the platform. The concept of a many-sided market is also obvious: for the Palo Alto firm, this involves handling three main elements; namely content producers, end users (audience) and advertisers that finance the system. Consequently YouTube content seems relatively “innovative” from a formal point of view (video format, covering topics often not available elsewhere, etc.) but also from

the point of view of their producers' status (recognition of "pro-ams" illustrated by some worldwide famous "YouTuber Stars" - See Jenkins 2006; Snickars & Vonderan, 2009) and finally from the point of view of the public and viewing practices.

The YouTube model therefore relies on matching an organisation not involving upstream for content transactions, funding based on advertising and a range of services connected to emerging practices. Indeed, like Netflix and "binge-watching", YouTube services correspond to the developing demand, mainly a teenage audience which appreciates short formats and viewing on multiple devices which some experts call "ATAWAD" ("Anytime, Anywhere, Any device").

However, YouTube's economic results in 2014 were disappointing for most observers: in 2014, they were estimated at \$4 billion, well below the forecasts announced by the firm and which, above all, just allows the company to break even⁴. In addition, with increasing competition from other OTT platforms and services (e.g. Hulu website -see Kim 2012- or Facebook which has its own growing hosting videos service), we can understand why the Alphabet subsidiary has, for several years, been implementing a significant shift in its strategy focusing on supervising (originally) unprofessional content production to match advertisers' expectations.⁵

The idea is to help professionalise "promising" amateurs to enhance both the quality and productivity of these producers in order to provide content that is formatted for advertising and, if possible, exclusive (Bullich 2015). Alongside this work with amateurs, YouTube has also increased the number of closed partnerships with professional content providers as illustrated by Vevo, the main YouTube music channel funded and supplied by record labels. Finally, the site has also started moving in a new direction that takes it away from its original purpose - previously summarised by its slogan "Broadcast Yourself" - as YouTube has invested in directly funding professional content since 2012.

C. Internal production

The main pure OTT players (in this case Netflix, YouTube and Amazon Video, namely those unaffiliated to content producers) have taken a third way intended to provide them with exclusive content: on the one hand direct investment in the production of short, medium-length and feature films in the form of series or standalone programs and, on the other, by funding audiovisual programs exclusively broadcast on these OTT services. Netflix has been implementing this third type of strategy since 2011 through its partnership with NRK1, a Norwegian television channel, to produce a dramatic series called *Lilyhammer*. The series is a success, notably because the Los Gatos firm, with its expertise in its subscribers' consumption trends, makes all the episodes available to them at once.

Netflix thus defines the model of what has later become its distribution strategy, based notably on "binge watching" and fully meeting its subscribers' expectations. The firm is now increasing its investment in content production by 50% each

year on average and has enjoyed major popular and critical success with series like *Orange is the New Black*, *Arrested Development* and especially *House of Cards*. In 2014 specialists estimated that the company invested \$2.8 billion in content production and have forecast that this amount will rise to nearly \$5 billion in 2016 (more than double the investment made by a giant audiovisual content producer such as HBO).⁶

In addition, what is remarkable in this strategic content production is the fact that the US firm is seeking funding for local productions: Netflix invests, for example, in the production of a series entitled *Marseille* to make it easier to enter the French market and did the same with the *Suburra* series in Italy and *The Crown* for the UK. This internal production framework goes hand in hand with the internationalisation strategy of the firm, the more so because "the production of original content allows Netflix to hold exclusive rights to the territories in which the service is provided" (CSA 2016, p. 11).

Other pure players have also invested in production but to a much smaller degree. For example, YouTube invested more than \$100 million in short films, TV series and shows in 2011 and 200 million more in 2012⁷. Although the Mountain View Company remains relatively quiet in terms of original content, it nonetheless announced in 2015 the launch of its "Red YouTube Originals" program. This logically extends the implementation of its professionalisation strategy based on "YouTuber Stars" and involves the production of a dozen series and films featuring the most famous "YouTubers". This program also introduces a new business model based on this new positioning funded by subscription fees.⁸

For its part, Amazon Video has entered the production field via Amazon Studios. After a first attempt to move towards film production in 2008 and co-production with 20th Century Fox for an unsuccessful movie called *The Stolen Child*, the company returned to audiovisual production in 2013 and funded the production of around fifteen series in the following two years. Some of these items have received very positive reviews from the public and critics (*Transparent*, *Mozart in the Jungle*), endorsing Amazon's strategy. Amazon Studios has also produced nearly thirty pilot prototypes from 2013 to 2015, half a dozen kids' programs as well as a feature film in 2015.

However, both YouTube and Amazon Video are still far from having an internal production system and the content provided continues to come from experimentation rather than a "container / content" integration strategy (for now at least). Nonetheless, a bipolarisation of these actors' catalogues has clearly emerged with back catalogue content (Netflix, Amazon Video) associated with secondary content (YouTube UGC) and premium content available on their own OTT services. In doing so, they've adopted processes which can also be found in the traditional audiovisual sectors.

To conclude, the developing influence of OTT players in the American audiovisual industry through the complementary nature of the three ideal strategies outlined above is in line with growing audience segmentation and fragmentation. Although

this phenomenon is already old, it is certainly accelerating with such OTT strategies and the consequences for traditional audiovisual markets are still unclear (although budgetary decisions by consumers in favour of new players and the effects of advertising resources being more widely spread are already visible). What we know for sure, however, is that exclusive content is the key resource in the entire ecosystem and therefore a strategic issue.

3. Data as a new “key resource”

If exclusive content is a major issue, OTT services revealed a new “essential resource” in the audiovisual landscape: data. Resulting from anti-trust law, the concept of “essential resource” refers to a resource that gives its owner a lasting and dominant position in the market. This notion is used here to emphasise the essential character, in the near future, of data for the existence of production and audiovisual markets.

In this third section we will try to summarise the main factors contributing this new prevalence of data, beyond the media buzz. To do so we will first concentrate on the role of interfaces and the general ergonomics of these OTT services from a data mining perspective. Then we will focus on the functions of recommendation / prescription, now automated through the use of algorithmic devices, as well as the role of these devices from a content production perspective. We will conclude this section by considering the role of data mining in the ever-greater personalisation of audiovisual advertising programs.

A. The central role of interface and multi-screen strategy

The addition of internet-based content and services to traditional TV leads to an abundant supply and increased complexity for users. In an intensely competitive environment initially characterised by a certain degree of uniformity in terms of what is on offer for both these devices and some OTT services (such as Subscription VoD or SVoD), the quality of the interface is crucial to attract and retain users.

Ergonomics, namely usability and intuitiveness, the fluidity of the navigation system, the speed of response, the advanced remote control functions, the reliability of different devices and other features (parental control, personal data protection, secure payments etc.) appears to be a differentiating factor between players. In this area international OTT services like Netflix and YouTube, developing a range of services and making their content denser, tend to “downgrade” the traditional player applications. In our study, this “downgrade” reflects a situation of disequilibrium related to gaps in human and technical terms, and therefore also financial terms, resulting in uneven and visible competition between players: a particularly significant issue in emerging countries where local players often can't invest in expensive applications and technical maintenance.

A multi-screen strategy appears to be a key issue in this new audiovisual landscape. It helps to unify distribution solutions

on the open internet and thus encourages new OTT service entrants basing their development on this configuration. Indeed, video content, located on the cloud servers, must by definition be distributed on a number of devices: PC, mobile, tablet, connected TV. Rather than specific solutions for each terminal, the challenge for OTT players is to set up a single infrastructure that can dynamically adapt to all consumption scenarios. American giants such as YouTube and Netflix have strengthened their international penetration thanks to the large amount of content they offer but also by providing quality applications on all platforms.

In addition, encouraging feedback and the customisation of search tools appears vital to simplify user navigation in huge banks of content (Netflix offers over 100,000 audiovisual references). In recent years Netflix's investment in this area has been considerable and the company can afford it because of the economies of scale provided by its international strategy. The interface then becomes a central tool for the service: by using SSO (single sign-on) access, the features of “one to one relationship marketing” can be deployed on all the user's devices.

B. Customising feedback and supply

Many studies have highlighted the prescriber role of TV channels (for example: Benghozi & Paris 2003). In the case of OTT audiovisual services, this role is partly delegated to a system of algorithmic data processing that automates this feedback / prescription function. Indeed, unserialising, that is to say the transition from a flow model to a stock model, made “active” limitation much more important. This paradigm shift from “Top Down” television (non-interactive and linear) to “Bottom-Up” television (on-demand, without constraints of time or place thanks to mobile devices, according to Boddy 2011), has the major consequence of eliminating the central function of programming in the audiovisual sector. If the TV channel plays a prescriber role, it's especially through the quality of its program schedule. Yet, the inherent content fragmentation of these OTT services, which operate as aggregation platforms, breaks radically with this model and gives viewers an unprecedented wealth of content to choose from. The challenge for OTT players is to provide advice in the sense of directing viewers towards customised content suited to their tastes in order to keep them within their digital environment, which is essential to acquire personal data.

Automated feedback systems for viewing or using content are generally based on the user's consumption patterns (recorded via personal accounts) and, secondly, on recommendations provided by other users of the same service (the principle of collaborative filtering). Consistently presented by the OTT players (including Netflix and Amazon Video) as “added value” to their services, these feedback systems are not entirely new. Indeed automated and personalised feedback was initiated in the US by TiVo set-top boxes in 2000. However, it has significantly improved as a result of the unprecedented growth

in data availability and sophistication of algorithmic processing devices. On this particular point, Netflix is probably the most illustrative case. Since it was first set up, the company has established an efficient information system that provides it with good information on its subscribers. Firstly, Customer Relationship Management (CRM) software is primarily intended to establish its catalogue of references which is adapted to customers' expectations and, secondly, to a customised recommendation (although still not fully personalised) linked to selected references from those customers. Two main systems emerge: content scheduling (distinction of elements without hierarchy) and the pairing of such content with customer groups.

The algorithmic framework at the heart of the system is called *Cinematch* and, since 2006, this process has been greatly improved with the introduction of the "Netflix Prize", rewarding every engineer claiming to be able to improve automated matching by 10% or more with \$1 million, providing the company with a huge number of technical proposals⁹. The strength of the Netflix model is based on the successful combination of an impressive amount of work carried out by humans, technical operators to efficiently extract customer data and an algorithm configuration to automate and schedule feedback tasks.

Upstream, the human work is comprised of content analysis by about 700 professionals who apply over a hundred micro-tags (metadata) for each element analysed; downstream, the device allows the extraction and analysis of 30 million views per day but also traces three million daily searches; at its core, the algorithmic processing continuously produces connections between 80,000 combinations resulting from micro-tags, viewer behaviours and viewer ratings (behaviours measured by collaborative filtering). What appears remarkable with the Netflix model is that, besides the sophistication and relevance of the recommendations made, it has also drastically helped to steer in-house productions. Thus, the *House of Cards* and *Orange is the New Black* series are presented by company managers as largely resulting from the data collected regarding the preferences and uses of millions of Netflix subscribers¹⁰. An "editorial" algorithm would later determine a set of correlations that have served as a template for choosing the proposed themes, scenarios and would also guide the casting and director choices.

Data therefore appears to be a decisive factor in production for two reasons: firstly, because of their *sine qua non* integration into pairing processes that allowed (customised) feedback to replace mass promotion; secondly, because of their integration into offer-building strategies, directing content acquisition policies and contributing to the production of content (following a format-based logic). The "core function" (Miege 1996) in the field of broadcasting traditionally occupied by the program management team is being delegated to technical and algorithmic processes that replace humans in the cases just described.

C. Towards a major change in audiovisual commercial communication?

If data appear to be a key resource in the digital world, on the one hand to maintain subscribers and attract new ones, on the other to establish what is offered and produced, then data also seem to be decisive in communication and the advertising market. Indeed, to value their scattered audiences, OTT players whose model is based on advertisers funding production are seeking to adapt their advertising tools to the service's technical characteristics. They therefore rely on an individualised customer relationship which can offset the quantitative decline in audience as a result of fragmentation due to the large number of channels.

The challenge is to establish a direct link with customers able to attract advertisers. This is still the multisided market model, classic in the media, albeit with unprecedented sophistication because of the technical tools that enable automation with a new precision to match viewers and the content offered, as well as viewers and the advertising message. By acquiring and processing personal data using CRM software, OTT services managers are able to direct viewer choice and, above all, to adapt advertising messages to:

1. Viewed content: context and content-sensitive advertisements on screen or commercials automatically appearing before viewing the requested content ("in-stream ads").
2. User navigation traces: these services create a certain kind of "commodification of uses and traces" which consists of gathering information while users are browsing then increasing its value as a "marketing profile" (Chamberlain 2011, p. 242). Consequently, data appears both as a production factor and an assignable value.

However, while the possibilities offered by technology in marketing are able to significantly improve the quality of advertising exposure and thereby provide potentially substantial income sources for OTT players, these tools have important implementation and management costs. At least initially, only financially strong players could fully exploit them while other companies would have to maintain a business model where advertising revenues are not predominant (subscription, sales terminals, pay per view / pick-and-pay). In addition, the measuring systems associated with the tools to personalise audiovisual commercials are currently being questioned.

Indeed, these are mainly created by industrial players themselves and are not certified by any independent body. This lack of transparency logically has a negative impact on advertiser confidence, thereby greatly hindering the development of this individualised advertising (Wolk 2015). Nevertheless, and considering the potential of a personalised relationship with consumers, it's easy to imagine this problem being solved in the coming years. Data will be so pervasive in the future and

the players' ability to collect and treat data will undoubtedly become such a decisive advantage in the "screen war" and "fight for attention" that this will influence the structure of the audiovisual sector in the coming decades (Webster 2014).

4. A necessary adaptation to regulations

The multiplication and heterogeneity of devices that provide access to audiovisual content via the internet raise thorny issues as to how to adapt the regulatory framework. As is often the case with internet and digital tools, socio-technical mutations are occurring at a pace which the legislature has trouble keeping up with. In this fourth part, we leave our American setting and focus on the regulation of OTT audiovisual services envisaged in most OECD countries. Our aim is not to draw up an exhaustive typology of legal systems and to carry out a comparative analysis of the regulations implemented in each country but, more simply, to identify the main challenges faced by legislators and the main strategies put in place or planned.

A. The two main pathways used by legislators

In order to set up a legal framework for OTT services, two main approaches have been favoured by the legislator. The first one is based on the nature of the content and the similarity of practices and uses of OTT services to "traditional" television in order to initiate legal harmonisation regardless of the screen and how content is received in technical terms. This type of approach is found, for example, in Canada and Germany (Noam, 2008). Meanwhile the United States has implemented a regulation based not on the nature of the content or resulting practices and usages but on the technical specifications of broadcasting / distribution conditions (a similar approach is used in South Korea, for instance).

In fact, the Federal Communications Commission (FCC) only officially addressed the issue of regulating internet broadcasting in 2004. At this time the FCC began a thorough review of the control of IP services (which includes the various OTT services). Unlike most countries in the European Union, the FCC does not distinguish between linear (e.g. IPTV) and nonlinear (e.g. VoD) broadcasting. For this reason, the FCC did not seek to transpose the rules applicable to terrestrial broadcasting to OTT services or to set specific regulations according to each mode of access to audiovisual content.

In Europe, the EU-wide regulatory system has been built around the principle of "neutrality". This neutrality, namely equality of treatment, applies to both technical broadcasting modes and the services offered. Thus communication networks are not distinguished from each other, although exceptions are made in the particular audiovisual context (Vachey 2011). The challenge for the European legislator is the relevance of adapting the specific television regulatory framework to new types of audiovisual programme broadcasting. In terms of the OECD countries studied, legislators have remained cautious,

seeking in particular to avoid creating regulatory barriers to the development of this area. Nevertheless, and particularly in the European case, it seems that, under pressure from television channels, legislators will be forced to extend, at least partially, the audiovisual regulatory principles to OTT services in order to maintain equal treatment.

The transposition of some of these rules does not seem to pose major problems, although for others the task may be significantly more difficult. Indeed, the harmonisation of media chronology rules, signage systems for young audiences, advertising restrictions, broadcast content control (respect for the dignity of people, prohibition of racist or anti-Semitic messages, etc.) among the various audiovisual content distribution players poses no technical or legal problem as long as the programmes in question incorporate the traditional distribution framework.

In the case of unedited content (i.e. user-generated content without commercial or counterfeit programmes), such transposition proves much more complicated to implement: first, it is particularly difficult to control all content offered by private individuals (considering the volume and speed of rotation) and, secondly, the laws defining the responsibility for such content are often unclear or abstruse. In fact, responsibility varies greatly depending on the device: whether this is likely to apply to services that are similar to publishing (e.g. YouTube) or to the accumulation of content for which distribution rights were negotiated in advance (e.g. Netflix), it is in no way the responsibility of the "simple" technical provider that put together a package of channels.

Finally, from the point of view of institutional organisation, the question arises of which administrative authority should be in charge of these services. The hybrid nature of OTT audiovisual services, both TV broadcasters and telecommunication services, undermines the areas of competence traditionally established between an audiovisual media authority and an electronic communications authority (BEREC 2016). Thus, in most countries surveyed, consultations were carried out on the possible convergence or even a merger between these two regulatory bodies and the body of laws associated with them, sometimes resulting in a single authority (as is the case in Italy, the UK and Finland, for example) but more generally in partial mergers between the different administrations and regulatory frameworks, as was the case in Korea and is under discussion in the United States and France.

B. Specific difficulties

Overall, the internationalisation of production and broadcasting significantly increases the difficulties in applying "equality of treatment." Taking the controversial case of Netflix or YouTube in Europe, for example, it is clear that transnational players seek to take up residence in places where the tax and legal environment is the most favourable to them and that these host countries are not necessarily inclined to change their legislation to follow the example of more demanding countries. Beyond the question of tax revenue, the most critical issue is related

to the financing of audiovisual and film production. In many European countries this fundamentally depends on generalist TV channels, both public and private. Companies offering OTT audiovisual services are not yet under any obligation to fund or promote any national or regional content (e. g. broadcast quotas).

This situation raises serious concerns among traditional players because it's likely to lead to a profound questioning of national economies and public cultural intervention (as predicted for France a few years ago, see Benhamou 2006). In addition to such issues regarding the harmonisation of regulatory frameworks, OTT services also pose new regulatory issues in the audiovisual sector. Indeed, personalisation systems, CRM software and ad targeting imply, for the audiovisual regulatory authorities, the need to ensure that the laws governing the conditions for collecting and operating personal data are applied. The main issues are, on the one hand, respect for privacy and, on the other, the prevention of data monopolisation strategies from some OTT services in a dominant position (principally YouTube and Netflix).

The aim is to guarantee users' rights regarding their own personal data by preventing any undue privatisation (this type of information should not have an owner) by forcing OTT services to be transparent about how they collect, store and retrieve data and by requiring them to promote a "free flow of data" (European Commission 2015). In addition, the legislator is also responsible for ensuring that those companies with large volumes of personal data implement efficient cybersecurity systems (BEREC 2016). Finally, there is also the issue of the legal framework for prescription / feedback algorithmic devices as these also require special attention from the authorities: indeed, OTT services make decisions regarding selection and publication.

Firstly, we should assess how fairly the content offered to final consumers is presented and, secondly, transparency measures should be introduced for content access (such as the obligation to publish clear consumer guidance on anything relating to advertising, generic algorithm selection, customised adaptation or OTT service preferences). The concept of "information system loyalty" has emerged in Europe in order to emphasise the non-neutrality of algorithmic processing; this loyalty should be applied to consumers as well as to content producers (see, for example: Conseil d'État 2014; European Commission 2015).

In the US, the relevant authorities (including the FCC and the Federal Trade Commission or FTC) favour the concept of "non-discrimination" of algorithms (Ramirez, 2015). Non-discrimination requirements should apply to forms of expression, types of content and also to the conditions of access to the various OTT services, which should never be based on ethnic, sexual or economic criteria. Thus, on both sides of the Atlantic, legislators share the same desire to require OTT services to provide consumers with information on selection and feedback criteria and to guarantee the fairness of these automated processes.

C. The unknown effects of illegal sites

After this summary, it seems clear that OTT audiovisual services are a key regulatory issue for both audiovisual and telecommunication authorities. Two issues appear decisive: the first relates to the delicate relationship between the traditional sector for which specific regulation has slowly been established and the new OTT services for which the legislature needs to provide a rapid and fair response, that is to say legislation that takes into account both the similarities and singularities of these two modes of distribution. The second is beyond the scope of OTT services and relates to the legal framework for data processing via algorithmic devices. This issue predominantly concerns legislators, as evidenced by the work of the European Commission (2015) and the FCC (2016)¹¹, and it clearly illustrates the phenomenon of convergence taking place between electronic communications and the audiovisual industry.

Before concluding this fourth and final section we should mention one aspect which has been more or less ignored although it is probably decisive in the development of these services: namely competition from illegal sites. Indeed, these illegal OTT services form a vast continent that defies regulation but has a significant impact on audiovisual markets (regardless of the form and technique used to broadcast). Although, by definition, it is very difficult to perceive these players and their activities, specialists estimate that the income from such illegal sites totalled between 50 and 70 million euros in 2010¹² and a recent study proposed a figure of 10 million to quantify the number of regular users of these sites for the French territory in just 2015¹³. Moreover, major American series are the most downloaded with record amounts for 2015: a series like *Game of Thrones* was downloaded over 14 million times during the year¹⁴. Beyond questions of revenue shortfall, this "unfair" competition also partly affects the legally provided content.

Therefore we can consider the combined efforts and sophistication of feedback processing devices as a way to fight against free access, which is an essential (but not exclusive) component of illegal sites. Indeed, continuous adjustments of copyright laws have so far proved ineffective in countering such sites and OTT players have had to find alternative ways to compete with them. Convenience of use seems to be the main alternative for legal OTT services, as they make the search for information much easier and offer direct access to a large amount of content within a (supposedly) secure framework. It is impossible to predict how illegal players are going to change the industry, although it seems certain that some legal players are able to beat this particular competition by proposing higher quality services which justify the subscription fee. On this subject we therefore concur with the view of some economists that "piracy" does not systematically harm competition or the ideal situation for society provided that strategies are put in place to differentiate supply based on quality and price (i.e. vertical differentiation).¹⁵

Conclusion

The recent positioning of powerful new entrants upstream in the audiovisual industry and the multisided nature of content distribution is systematically raising issues regarding the new emerging configuration. As a consequent, the hypothesis that the “convergence” strategies put in place over the last thirty years, both by consumer electronics manufacturers and by IT and telecommunications manufacturers, could deeply affect the organisation of production and distribution, business models, access to and consumption of audiovisual content should be carefully examined. This hypothesis has been repeatedly tested in many studies since the late 1980s (e.g.: Tremblay & Lacroix 1991; Moeglin & Tremblay 2005). At first glance OTT services seem to fully illustrate this convergence. Indeed, these new services have introduced three major changes. The first is related to the end of the “silo” organisation (Nuechterlein & Weiser 2005). Television was viewed only on a specific screen, offering specific products and content distributed via dedicated technology and identified players, and finally, the activity was governed by a set of specific regulations based on a national framework. OTT services have profoundly disrupted this paradigm. Not only can television now be watched on multiple devices in multi-screen and multi-channel access but its content is now available in multiple forms. The second significant change is particularly visible in the practice of viewing and is inherently linked to unserialising. This breaks with the linear flow that characterised television broadcasting and gives viewers the chance to interact with content by allowing consumption to be potentially “active” and personalised. The third of these significant changes relates to the supply of content, which is no longer the exclusive domain of traditional broadcasters but is now open to any content or service editor, including publishers and non-professional producers, resulting in an unprecedented diversity and abundance of audiovisual content.

However, in spite of incessant rhetoric from governments and manufacturers about the coming of a “new era of television”, the picture presented in this article is one of an undeniable shift in the audiovisual landscape, albeit rejecting any scenario of a complete rupture. Unlike the recorded music industry where OTT services (music streaming provided by players such as Spotify and Deezer) are poised to take over from the traditionally dominant players¹⁶, traditional television doesn't seem to be in danger of disappearing or even of losing its status as the primary medium (for the moment at least).

TV channels have great assets to withstand this multiplication of audiovisual online content: the strength of their premium programmes and of their media brands, the power of prime time and live events and the ability to retain their audiences thanks to weekly or daily appointments (series, TV news, reality shows, etc.).

In addition, the promotional power of large audiovisual networks in the United States still remains essential to the whole sector. Indeed, the main “blockbusters”, including those

available on OTT platforms, are routinely offered on these networks which have a unique exposure. This observation tends to support the idea that “broad audience” channels as “prescribers and window display” still have a leading role in the recommendation of content (Paracuellos & Benghozi 2011).

However, it is clear that these OTT services reveal a deep trend in the digital economy due to the increased importance of the intermediation function in all cultural industries. Following this logic, the global value of any content access system lies as much in the cultural product circulating (the content itself) as in the interface used to find and qualify it and the set of connected services providing a user-friendly experience (as evidenced by the ever greater availability of content and the slogan “TV Everywhere”, a recurring expression in industrial speeches and commercial promises). Nevertheless, we have tried to show that some of the “rules” from the traditional television industry are still highly influential, even for these new services and markets: the exclusivity of content, the decisive role played by recommendation and the special attention given by the legislature are all examples of such rules.

Notes

1. This book based on a transatlantic and transpacific collaboration between the Columbia Institute for Tele-Information, the European Institute for the Media and the Center for Global Communications at the International University of Japan, which specifically sought to identify the most mutagenic aspects linked to the emergence of internet TV services (over-the-top services and IPTV) for the traditional audiovisual sector and the associated forms of regulation (Noam et al. 2004).
2. We can observe that Netflix has retained its DVD and Blu-Ray rental business via subscription, which reported more than \$646 million in 2015 (CSA 2016).
3. This model of production and valuation is indeed very close to the one established more than twenty-five years ago by two Quebec researchers in a study focusing on the development of cable television: they called it the “club model” (Tremblay & Lacroix 1991).
4. According to figures from the *Wall Street Journal* of 02/25/2015. Available at: <<http://www.wsj.com/articles/viewers-dont-add-up-to-profit-for-youtube-1424897967>> [Consulted: 03/26/2016].
5. As noted by P. McDonald, advertisers have long been reluctant to associate with non-professional content because this is often based on poor quality, is sometimes considered immoral and often in breach of copyright (McDonald 2009).
6. According to figures from the French business magazine *Les échos*. Available at: <http://www.lesechos.fr/16/02/2015/lesechos.fr/0204163543155_netflix-ecrase-la-concurrence-a-coups-de-milliards-de-dollars.htm> [Consulted: 03/26/2016].

7. Based on figures from MediaAmerica, the media information magazine in North America produced by the Cultural Services of the French Embassy of the United States. Available at: <http://mediamerica.org/vod/youtube-investit-dans-la-creation-de-contenu-et-cree-100-nouvelles-chaines-professionnelles/> [Consulted: 03/28/2016].
8. Until 2016, paid channels on YouTube were not related to the Mountain View player but based on initiatives by companies which had decided to emphasise their content in this way.
9. The award in 2009 was given to the collective “BellKor’s Pragmatic Chaos”, composed of engineers working in AT & T laboratories and independent IT professionals from Austria and Quebec.
10. The number of subscribers then amounted to 33 million (2012). At 31 December, 2015, Netflix had more than 45 million subscribers in the US and more than 75 million worldwide (the company is now present in 190 countries), according to figures from the CSA (2016, p. 2).
11. Such work focuses on the revision of the “Privacy and Electronic Communications” related to the European Commission (2015). The FCC, meanwhile, is focusing on the application and adaptation of the Privacy Act of 1974 to the current situation (FCC 2016).
12. According to figures from Idate and figures in Farchy *et al.*, 2015, p. 64.
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13. According to figures from CNBC. Available at: <http://www.cnbc.com/2015/12/28/game-of-thrones-and-interstellar-named-2015s-most-pirated-tv-show-and-film.html> [Consulted: 03/28/2016].
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OTT platforms distributing media content: a threat for the free-to-air TV duopoly in Spain?

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Abstract

The arrival of over-the-top (OTT) players in Spain's media market has resulted in the importation of the successful business models of pay-TV from the United States. However, the origin, historical development and regulation of the TV market in Spain mean that its TV ecosystem is substantially different from the US market. This article aims to verify whether the powerful industry of free-to-air private TV, led by Atresmedia and Mediaset, will prevent OTT media business models from being implemented in the short term or whether, on the contrary, these convergent players will pose a threat to the traditional TV broadcasting model.

Keywords

OTT, media, business models, television, duopoly.

Resum

L'arribada d'operadors over-the-top al mercat audiovisual espanyol ha suposat la importació de models de negoci de pagament que han obtingut bons resultats als Estats Units. No obstant això, l'origen, el desenvolupament històric i la regulació del mercat de la televisió a Espanya fan que el seu ecosistema televisiu difereixi substancialment del nord-americà. L'objectiu d'aquest article és esbrinar si la potent indústria de la televisió privada en obert, encapçalada per Atresmedia i Mediaset, impedirà la implantació a curt termini de models de negoci audiovisuals OTT o si, per contra, aquests operadors convergents suposaran una amenaça al model d'emissió televisiva tradicional.

Paraules clau

OTT, audiovisual, models de negoci, televisió, duopoli.

1. Introduction

The media ecosystem that includes audiovisuals is currently undergoing a revolution in terms of market. Whereas the digitalisation of radio wave TV (DTT) represented a watershed in Spain's TV system, convergence between the telecom industry and the internet and the development of mobile devices have resulted in another turning point in the evolution of the so-called audiovisual services market (European Parliament 2010, Izquierdo 2014). The appearance of the internet in the (now digital) sector of audiovisual content has significantly altered how audiovisuals are distributed and consumed. As a result, TV content has fully entered the digital era, transforming access to such content and leading to consumption that is increasingly mobile, multi-directional and multi-device (via mobile phone, tablet, PC, consoles, Roku or Chromecast players, Smart TV...).

Francisco Campos Freire (2015) classified the arrival of such new technologies, processes and information management systems as "disruptive innovation" in the media ecosystem, destroying or complementing the traditional business models and value chains of the audiovisual industry by introducing new

models of distribution and access and constituting a new ecology of the media ecosystem. In this respect OTT players function as "infomediaries" in audiovisual distribution (Campos-Freire 2013) and even as producers of audiovisual content, and carry out functions that were traditionally performed by conventional TV operators.

This article looks at the origins of OTT content providers, in the United States, where the penetration of digital video on demand (VoD) has historically been high: for instance, in June 2015 more than a third of American households subscribed to the provider Netflix, according to *Videonuze*. This OTT player *par excellence* in the market had over forty million subscribers at that time in the US alone. This is merely an example of the impact of new convergent models on the distribution of audiovisual content.

Tentative signs can now be seen of business models that integrate roles traditionally associated with TV broadcasting, such as production or the broadcasting of series and films, with those of online digital distribution. However, looking once again at the US market, we should ask whether Spanish OTT audiovisual players will achieve such high levels of penetration

and success. The main obstacle is that Spain's public-private model of television has characteristics, resulting from its background and historical regulation, that have shaped its current form in which the hegemonic audiovisual model is free-to-air TV broadcast via radio waves.

2. Methodological aspects

The main aim of this article is to determine whether the emergence of new business models to distribute audiovisual content via the internet pose a threat to the hegemony of the free-to-air television provided by the duopoly of Atresmedia and Mediaset in Spain's public-private model. The objective is to determine, in the Spanish context, to what extent the distribution system for audiovisual services is currently undergoing a transformation of its model that may endanger the foundations on which traditional operators manage free-to-air TV or whether, on the contrary, the new over-the-top (OTT) business models will not disrupt the structure or distribution of Spanish TV in the short term.

The point of departure for this work is the hypothesis that, in Spain, OTT audiovisual business models will not affect the traditional broadcasting structure in the short term. The main reason is that the private duopoly of free-to-air TV is based on a model of audiovisual distribution and consumption that provides free access and is free of charge via TV broadcast on radio waves, which has now become digital. On the other hand, the low penetration and little public support for pay audiovisual services¹ (via satellite, cable or internet) has left the door open to piracy as a habitual way of accessing content other than free-to-air TV, both in the physical video market (DVD and Blu-Ray) and via the internet.

This article will first define the mixed public and private model of television in Spain, compared with the US model that is the origin and benchmark for the OTT business models reproduced subsequently in Europe. We will review the beginnings and development of pay OTT players for the distribution of audiovisual content and the most relevant business models in this sector, both in the US and also in Spain, ending with an overall appraisal of the models that, taking into account the context and development of Spain's TV market, will help to determine the future of these platforms in such a market.

The methodology used for this study consists of identifying and analysing the main OTT audiovisual distribution models as well as their key players, both in the US and in Spain. We have based our study on a review of the documentation, which provides a general framework for an economic analysis of media companies in the era of convergence. In this respect, our references have been the latest works by authors such as Gillan (2010) and Albarran (2010) in the US context; and others such as García-Santamaría (2013) (2014), Artero (2008) and Campos-Freire (2015) in the case of Spain.

For the specific study of the US market, we have used the

regular reports published by *VideoNuze IQ*, the publication specialising in the online video industry in the US. This publication analyses the different players in the OTT video market, their development and the dominant business models in this market which are, in general terms, those which Spain has imported. Our study of the US online video system has been completed with specialised reports drawn up by analytical organisations, mostly privately owned, such as BGC Perspectives, Analysis Mason, PwC and DigiWorld.

In the Spanish case, in order to identify the OTT players present in the market we have used the portal TVISO,² an online video aggregator that compares and combines streamed content offered by the distributors present in Spain. This has been our point of departure for determining the OTT players in the Spanish market; however, subsequently we also studied the content provided by each player via their websites. We have also used the annual report produced by the European Audiovisual Observatory (2015) on the state of the sector at a European level and in each member state, as well as other specific reports by local public and private organisations, such as CNMC, AIMC and the Observatori de la Producció Audiovisual. Lastly, we also consulted reports and articles in publications and portals specialising in the audiovisual sector, such as *Noticias de la Comunicación*, *PR Noticias* and the website *TDI1*.

3. Two divergent TV systems: current implications of the development of the Spanish audiovisual model

The Spanish audiovisual model reflects a Mediterranean-type or "polarised pluralist" system (Hallin & Mancini, 2008) which, regarding audiovisuals, is the result of the late introduction of the classic model of public service in Europe, which then transformed into a hybrid between the public and commercial model. The development of the mixed public-private model of TV in Spain is largely conditioned by its background and historical evolution and by public policies that have affected the market's development to date. In this respect, the Spanish TV system has a number of defining features that set it apart from the US system and which might currently impede the arrival and stabilisation of pay business models implemented in the US by the major OTT players. Some of the most important particular features of Spain's TV model are as follows:

- **Late industrialisation and democratisation have delayed the development of communication companies.** Modern industrialisation didn't start until the second half of the 20th century. Consequently, the media as independent companies, unrelated to political powers, didn't develop until the last quarter of the century, after Franco's death.
- **The public and state origin of TV.** At first the TV model was associated with state power, moreover under a political dictatorship. Franco's government concentrated and centralised public TV broadcasting from its beginning

in 1956. The content and management of early television in Spain were therefore monopolised, politicised and subject to the will of the government with zero public or private alternatives throughout the country (Bustamante 2013).

- **Little development of transmission systems such as cable or satellite.** The governmental origin of TV also limited support for these distribution systems which, however, did enjoy high rates of penetration in other European countries (such as Germany and Belgium) and in America in general. Consequently, cable and satellite have remained relegated to the pay model and public administrations have not encouraged or subsidised their development, unlike radio wave TV, analogue and digital (García Castillejo 2012).
- **Little penetration of pay TV.** As a consequence of the previous point, there is an imbalance between the penetration of television based on direct pay models and free-to-air TV broadcast via radio waves. In 2013 the degree of penetration of pay services in Spain was below 25% compared with the obligatory 98% of free-to-air DTT (OEA 2015a).
- **Economic crisis and limited purchasing power of households.** The perception of pay TV services as non-essential has increased since 2008 when the economic recession started to hit Spanish households and spending on leisure and entertainment was no longer a priority.
- **Multiplication, fragmentation and concentration of free-to-air content.** After the digital switchover of TV, audiences now enjoy a much more diverse and fragmented consumption of free-to-air television (Izquierdo 2014). However, although more specialised supply has brought about a revolution compared with the previous model which was based on large generalist channels, the origin of more than half the free-to-air channels corresponds to the two major audiovisual corporations, Atresmedia and Mediaset.
- **Internet and the culture of free content.** The internet has encouraged a scenario in which users can access almost all the audiovisual content available in the world merely by owning a device and being able to connect to a network. In Spain, given the relative lack of business models providing affordable access to this content, viewers have tended to resort to piracy; a habitual tendency for Spanish consumers in the digital era, as can be deduced by the proliferation of P2P sites for the illegal consumption of content online.

For its part, the TV distribution model in the United States, eminently private and with a high penetration of pay services, has traditionally applied video on demand (VoD) business models, either through cable, satellite or the internet (imported by

Europe later on); or with physical video club services that have managed to adapt their business to the mobile digital environment, as is the case of Netflix. On the other hand, the characteristics of Spain's broadcasting and consumption model, where users have access to a large amount of free content, means that the conditions for OTT players to enter the audiovisual market and develop vary between the two countries in question.

4. Over-the-top digital video distributors: the online video business imported from the US

Over-the-top players are those "metaservices" (Campos-Freire 2013) that have the necessary infrastructure to disseminate content generally generated by third parties via the internet and towards fixed and mobile devices of all kinds: smartphones, tablets, digital video players, Smart TV and conventional computers. The advantage of these free transmission providers is that they use the data networks of national telecom operators to transmit all kinds of information and content globally. The business opportunities within this kind of service are therefore highly attractive as they do not need or possess the network infrastructure nor generate the content transmitted via this infrastructure. There is a wide range of such operators: from messaging services (Whatsapp, Line and Messenger), voice services (Skype and Viber) and platforms distributing audiovisual content, which we are looking at here.

These information transporters emerged strongly in the traditional market of audiovisual distribution in the United States and have gone on to expand with considerable success, first in Europe and then in the rest of the world. The reasons for this expansion are evident. On the one hand the universalisation of broadband internet connection networks, especially mobile, and their optimisation via the high speeds provided by 4G. As a cause and a consequence of this, the development of devices capable of reproducing streamed content has transferred traditional fixed and static VoD services (and even "physical" video clubs) to many different kinds of mobile receivers. Digitalisation, both of audiovisual content and its dissemination, has also multiplied, diversified and fragmented the supply of audiovisual content and access to this. As a result, users of the new convergent audiovisual ecosystem enjoy the added value of being able to "choose" compared with the traditional concept of lineal TV. In the new consumption environment, what's important is the programme, clip or video or audiovisual content of whatever type, in contrast with the concept of a continual channel. Consumers, more active than ever, look for, choose and access content in a selective and fragmented way. Consequently, suppliers increasingly try to offer them a unique experience when consuming this audiovisual content, for which they need to provide added value by increasing the technical and formal quality of the content, the possibility for multi-screen access, personalisation of the supply and a varied catalogue that is constantly evolving at an affordable price.

In 2015, in the United States, seven out of every ten internet users accessed online videos via OTT providers³. Given such a figure, the main interest of operators, both traditional and recent arrivals to the market, is to determine the best way to monetise these new trends in audiovisual consumption. However, when we look at the dominant business models of these operators in the US, the first thing we see is that they're supported by traditional pay television or video club models, reproduced in the new digital environments. There are three main models of business for distributing digital video via OTT, based on the classifications made by authors such as García-Santamaría (2014) and Izquierdo (2012):

1. **Subscription Video on Demand (SVoD).** This is based on the regular payment of a fixed fee (monthly or annually) entitling users to access a catalogue of audiovisual products (series, films, documentaries, TV programmes) consumed via streaming. In the US market, SVoD leaders are Netflix and Hulu (an online audiovisual content aggregator resulting from a joint venture between the networks ABC, CW, Fox and NBC). Both offer an extensive, personalised catalogue that has a large number of titles to which subscribers have unlimited access from \$7.99 a month. Also of note for this model is the online video club service by the giant Amazon, called Amazon Video, which, although offering its collection via pay-per-view, also has an annual subscription of \$99 which, in addition to other premium services on Amazon, also includes a flat rate for viewing a large part of its permanent catalogue. As an example of the high penetration enjoyed by these providers in the United States, in 2015 95% of OTT video consumers subscribed to Netflix, Amazon Video or Hulu, while the remaining 5% were shared among the other 98 SVOD services (including the OTT versions of major TV networks, such as HBO Now, CBS All Access and Sling TV).⁴
2. **Pay-per-view.** This consists of a one-off payment to access individual content, such as a film or episode, either by streaming (temporary renting) or downloading permanently to a device (purchase). This is the typical model of the "online video club" (also important in the music industry, with iTunes at its head). In addition to the pay-per-view version of Amazon Video, in the US market there is also the platform Vudu (owned by the powerful retailer Walmart), which offers an online catalogue with films and series, both new and classic, of diverse quality and with prices ranging from \$0.99 and \$6.99 for rental and between \$3.99 and \$24.99 for purchases.
3. **Free model (based on advertising or AVoD).** Just like the traditional free-to-air TV model, users can see content free of charge but, in exchange, they also have to see a range of advertising, which may be inserted within the video itself and/or in the interface of the app. Revenue from this

advertising goes to the producer of the content, as with traditional free-to-air TV and cinemas. The free version of Hulu is important in this area, as well as portals emerging with Web 2.0 such as YouTube and Vimeo which are now offered in an app.

As we have already mentioned, hybrid models are much more frequent than pure models and the majority of OTT players therefore attempt to combine business formulas including subscription, pay-per-view and download and, to a lesser extent, free access to content. The aim is for audiovisual content to reach a diverse audience which now has the power to choose what, how, when and where they consume and are no longer interested in accessing static, lineal TV content but in specific pieces of audiovisual entertainment, without fixed times or places of access (Campos-Freire 2015).

In this new model personalised, heterogeneous audiences have total control over the content they consume. The success of one model or another will therefore depend on providing, firstly, an extensive, varied catalogue, even niche content. But it also depends on enhancing the range of titles with added value services that generate more interest both in the product itself (high definition video, subtitles and versions in the original language, premieres, exclusive content, etc.) and also in the surrounding environment (personalisation of content, complete multimedia entertainment packages, identification with the brand or social interaction).

5. Over-the-top operators in Spain: the main business models and the content they offer

In Europe, access to VoD content via OTT platforms accounted for 60% of all access in 2013 according to the European Audiovisual Observatory (EAO 2015). In spite of this, the EAO itself notes that there are different levels of maturity for OTT services in the member states of the European Union. In 2013 45% of the revenue from VoD consumption throughout Europe came from the United Kingdom alone. The Nordic countries (Sweden, Denmark, Finland and Norway) also recorded a high penetration of these digital video services, accounting for 28.4% of total VoD consumption in Europe.

According to AIMC (2016), in Spain the consumption of TV content online has grown substantially, following the global trend. One out of four citizens stated that, in 2015, they accessed TV services via the internet every day; more than half did so every week. Although the majority of those surveyed preferred a laptop, access to audiovisual content via mobile apps exceeded 43% of the total consumption. Moreover, one of four consumers accessed daily via apps. However, the majority (73%) used free TV network apps.

In the Spanish market there are currently six major operators, some digital natives and others resulting from traditional TV companies, which distribute VoD via pay OTT models. Here it's

important to note that, although the state broadcaster RTVE also provides online OTT video services, this study has not analysed these as all the content distributed is free and financed entirely by the state (there is no advertising either). Below we describe the main characteristics of each private operator and their internet business model.

- **NETFLIX.** This successful US distributor arrived in Spain in October 2015 with a similar business model to its original version (the same one this Californian company has implemented in all 190 countries where it operates): a monthly subscription with a fixed fee that ranges between €7.99 for access via a single device to €12.99 for simultaneous viewing on up to four connected devices. This means that the same subscriber account can be shared by up to four people at any time. Netflix España also has, at present, a distribution agreement with Vodafone through which it sells its VoD services together with voice, mobile and internet services, based on a multiple play model.
- **YOMVI.** Movistar's streaming service comes from Yomvi of Canal+, before it was taken over by this subsidiary of Telefónica. Its business model is similar to Netflix: a fixed monthly fee that varies depending on the package of channels taken out, allowing subscribers to access 54 channels live and a large catalogue of content on demand. The main change in the service after becoming part of Movistar+ is the system for marketing Yomvi, which is now included as a complement to the pay-TV packages (which can be combined for a monthly price of between €20 and €30 each one) and in the multiple play packages (Fusión+) at a cost of €65 a month.
- **WUAKI.** This OTT player is Spanish in origin although it was taken over by the Japanese Rakuten in 2012. It was the first operator to combine a flat rate with one-off purchases of content via an economic transaction. Most of its titles are available in its *Selection* catalogue after paying a monthly fee of €6.99. This service is also complemented by the possibility of obtaining specific films and series, either rented or purchased (downloaded to the device). The main advantage of this model is that it multiplies its target as you don't have to be a subscriber to enjoy the pay-per-view service, at a price ranging between €1.99 and €11.99 (rental and purchase). The telecom operator Orange also offers subscription to *Wuaki Selection* as a complement to its internet pay-TV (IPTV) for an additional €4.99 per month.
- **FILMIN.** This is based on the online video club transactional model. It resulted from ten independent Spanish film producers getting together to take advantage of the rise of Web 2.0 to distribute their films via the internet. Filmin currently combines the transactional

model with the subscription model. On the one hand it offers titles from its catalogue for rent for between €1.95 and €3.95 per film; on the other it has a premium version in which, for €8 a month, subscribers can access most of the catalogue apart from specific titles classed as *premier*. These films can only be acquired via *premier* vouchers, only available to *Premium+* users who pay a larger fee (€15 a month with three *premier* vouchers). Filmin also rewards subscribers who take out long-term subscriptions (up to one year) with a proportional reduction in their monthly fee and free *premier* vouchers.

- **ATRESPLAYER.** This is the streaming service offered by Atresmedia, one of the two private audiovisual groups that dominate traditional television. Given its presence and dominance in DTT, for this player offering VoD is more a complement to its main business, which is free-to-air television. Its streaming is based on a combination of the three models described: subscription, transaction and free of charge. Most of its content can be accessed by anyone as it is also available on DTT. However, other added value services are added to this "totally free of charge" model, such as some premium content, higher quality (HD), language and subtitle options and the ability to personalise the service, among others. To access these, users just need to register on the platform; but if they want to get rid of all advertising seen online they have to pay a monthly fee of €2.69. The free or flat rate options are complemented with an online video club services for renting or buying films for between €0.99 and €15.99.
- **MITELE.** The other large pillar in the duopoly of free-to-air private TV, Mediaset, offers this streaming service via the internet and OTT. The business model on which *Mitele* is based differs the most from the rest described in this section. This platform transmits the same content as its DTT channels via the internet and apps and it could be said that Mediaset merely "uploads" its programmes and series onto Mitele to make them available via online demand. Its only pay content comes from a very limited catalogue of films, mostly co-produced by Mediaset, which users can buy by paying a fixed one-off price of €1.45.

As can be seen in table 1, most of the OTT distribution models use subscription, especially those whose business is solely on the internet (Wuaki and Filmin) or that come from other pay television or video club systems (Netflix and Yomvi). TV operators offer most of their online catalogue free of charge, simply uploading what they broadcast on the traditional TV system but on-demand, complementing their usual content with other exclusive content via pay models to attract and increase the loyalty of users who could potentially take out other OTT services.

Table 1. OTT video business models in Spain

Player	Model de negoci	Preu mínim	Oferta		
			Pel·lícules	Sèries	Programes
NETFLIX	Subscription	From €7.99€/month	1,031	225	5
YOMVI	Subscription	€20/month	1,128	297	245
WUAKI	Subscription	€6.99€/month	731	-	-
	PPV	€1.99-€11.99	3,805	60	-
FILMIN	Subscription	€8 or €15€/month	7,931	152	-
	PPV	€1.95-€3.95	7,931	152	-
ATRESPLAYER	Subscription	€2.65€/month	269	(72)	18
	PPV	€0.99-€15.99	2,581	47	-
	Free		-	72	78
MITELE	PPV	€1.45	35	-	-
	Free		-	52	168

Source: Author, based on data from the operators and TVISO portal.

Conclusions

Having compared the Spanish and US OTT business models and described the evolution of the TV system in Spain in the new media ecosystem, the main trend observed is the importation of the VoD business models present in the US market. However, the Spanish audiovisual market, traditionally dominated by free-to-air commercial television, has a number of particular features due to its history which lead us to believe that the implementation and stabilisation of these over-the-top audiovisual distribution models will be more sustained and long-term in Spain.

Since 2005 the public communication policies carried out by Spanish governments of different political leanings (Zallo, 2010), the advertising crisis and the internationalisation of the market have resulted in the concentration of TV operators, with Atresmedia and Mediaset controlling 54% of the content supplied free-to-air and 85% of the advertising revenue in 2015, according to Kantar Media. In addition to the power held by this duopoly in free-to-air television (Artero 2008; Izquierdo 2014) is the limited promotion and low penetration of pay TV in Spain which is, given its late start, somewhat smaller than its European peers and, logically, than pay TV in the United States (García Castillejo 2012). For this reason OTT platforms distributing audiovisuals face high barriers of entry when introducing their digital business models in a concentrated market based on lineal television and historically influenced by a “free culture” encouraged by the model of free-to-air television.⁵

Six online distribution platforms stand out in Spain's OTT market, most of them Spanish in origin. However, two of these audiovisual services via streaming, *Mitele* and *Atresplayer*, are managed by two large DTT corporations; and another, *Yomvi*, by a telecom operator that has absolute leadership in pay TV. Although these players realise the need to converge on the internet, they come from the traditional television broadcasting structure and are aware that most of their audience still lies in lineal television. That's why OTT services are merely a complement to their core business, conventional television, with high penetration and fully established business models.

Specifically, Atresmedia and Mediaset maintain and perpetuate the free commercial model, accumulating audiences on their different niche channels and, between both of them, have most of the advertising on DTT. Consequently, as claimed by the manager of Atresmedia, Maurizio Carlotti, at the CAC Fòrum de la Comunicació early in 2015, the main interest of these two large corporations is to focus on maintaining their dominance of the free-to-air commercial model in spite of their involvement in new distribution models based on convergence. *Atresplayer* and *Mitele* therefore wish to safeguard their duopoly against the potentially disruptive effect of over-the-top business models. To maintain their supremacy in the audiovisual panorama and perpetuate the current structure of the television system, these two large operators need powerful applications that offer similar content and models to the new platforms to provide users with the usual content but in line with their new consumption habits.

Probably, albeit in the long term, innovation in this model will come from services whose business is based 100% on the internet. *Netflix* is a case in point, an expanding platform that has internationalised its supply via a strategy combining a powerful catalogue of series and films available at a low price and with a high degree of personalisation. However, in Spain *Netflix* may come up against some competition, not so much from independent platforms with an online origin such as *Wuaki* or *Filmin* but from the pay services offered by *Movistar+* (which include *Yomvi*), which holds the rights to a lot of series and sports events as well as agreements with the US majors so as not to miss out on the internet audiovisual business and avoid being merely a “dumb pipe” for over-the-top distribution.

Notes

1. Between 2010 and 2013, the European Commission carried out research into the promotion of DTT in Spain. It believed the government had promoted only DTT, creating an unfair situation for operators of other pay platforms.
2. <<https://es.tviso.com/comparador-oferta-streaming-online>>
3. *Seven in 10 US Internet Users Watch OTT Video*, a <<http://>>

www.emarketer.com/Article/Seven-10-US-Internet-Users-Watch-OTT-Video/1013061> [Consulted: 02/04/2016].

4. Research: Subscriptions to OTT Services Aside From Netflix, Amazon and Hulu Remain Minimal. <<http://iq.videonuze.com/article/research-subscriptions-to-ott-services-aside-from-netflix-amazon-and-hulu-remain-minimal>> [Consulted 02/04/2016].
5. Up to 2010, not only private free-to-air TV channels based their business model on advertising; the state public operator, RTVE, had mixed funding with part of its revenue coming from sales of advertising space (combined with public subsidies), unlike the situation with other European public TV models, such as the United Kingdom, where citizens pay a direct fee to access public TV content.

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Monetization strategies and audience data for online video. The case of Atresmedia

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Abstract

The audiovisual market has changed dramatically. Thanks to the digital revolution, the consumption of video is becoming increasingly popular and broadcasters have started to offer online content, both free and paid. The purpose of this paper is to analyse how broadcasters can monetize the videos they offer online, paying attention to the audience data they need. The ultimate goal is to obtain recommendations related to audience data. We will use Atresmedia as a case study. The methodology is based on a combination of an analytical observation of the digital strategy, an analysis of internal reports and personal interviews.

Keywords

Broadcasting, advertising, big data, revenue, online strategy, social media.

Resum

El mercat audiovisual ha patit un canvi radical. Gràcies a la revolució digital, ha augmentat la popularitat del consum de continguts en vídeo i els organismes de radiodifusió han començat a oferir contingut en línia gratuït i de pagament. L'objectiu d'aquest estudi és analitzar com poden monetitzar els organismes de radiodifusió la seva oferta de vídeo en línia, posant atenció a les dades d'audiència que necessiten. L'objectiu final és obtenir recomanacions relacionades amb les dades d'audiència. Ens centrarem en l'exemple d'Atresmedia. La metodologia d'aquest estudi es basa en la combinació d'una observació analítica de l'estratègia digital, l'anàlisi dels informes interns i entrevistes personals.

Paraules clau

Radiodifusió, publicitat, dades massives, ingressos, estratègia en línia, mitjans socials.

1. Introduction

The audiovisual market has changed dramatically over the last thirty years and even more so since the implementation of digital terrestrial television throughout Europe. New suppliers of audiovisual content have appeared and audiences have fragmented. Broadcast television is therefore losing its capacity to attract big audiences. On the other hand, thanks to the digital revolution, the consumption of video is becoming increasingly popular. Digital content can be watched on different devices and in different formats and legacy television companies are trying to adapt their products to these new devices (Doyle 2010; Medina et al. 2011; Weeds 2015), offering both free and paid online content. Television viewing habits have shifted so the traditional television ecosystem is changing.

The loss of big audiences implies a reduction in advertising revenue that can affect the traditional broadcasting business

model. Operators might look for new income related to direct payment or micropayments for content, or new advertising formats. At this point audience data is essential to make money from this business (Bogart 1995; Berné et al. 2013). Consequently there's a new challenge in media research because traditional ratings are not enough and online audiences using a variety of devices should be also measured.

The purpose of this paper¹ is to review how broadcasters can monetize their online videos, paying attention to the audience data they need for this task. As outlined by Webster (2005: 380), "before we can understand the diet of media consumers, though, we need to look beyond the usage statistics of any one medium and study people's exposure to specific types of content across all media".

We will use the case study of Atresmedia in Spain. This is one of the private pioneer television companies and has won several

prizes for its digital strategies (Medina & Prario 2013; Medina et al. 2015; *Atresmediadigital* 2015).

The questions we want to answer through this case study are: a) how a broadcaster offers online video content; b) how this content is monetized; and c) what data are required to make money from the online video business. The ultimate goal is to obtain recommendations related to audience data in order to effectively monetize videos delivered online.

In the next section we will review the recent academic research related to online video consumption, the monetization of digital content delivery and the improvements in media audience research since the digitalization of media content.

2. Literature review

Broadcast TV has lost most of its audience (Farhi 2008). In Spain, according to the Orange Foundation (2014), 62% of the population spent less time watching TV in order to surf the internet in 2013. The time spent on watching videos for entertainment, sports and news is becoming greater on other devices and IP distribution than on broadcast TV (Europa Press 2014). Attention has become fragmented (González & López 2012) and has moved from broadcasting to online delivery.

This movement from broadcast TV to online video is even greater among young people. Following Jang and Coffey's study (2014: 46), "the 18-49 age group – the most coveted TV audience – has made the leap from traditional media to online platforms, ahead from other age groups". That's why Pomerantz (2006) questioned whether such a commercial target is still attractive for advertisers. Digital content on online platforms can therefore be seen as a threat for broadcasters' business (Ventosa 2016).

On the other hand, Chan-Olmsted et al. (2005) proved that heavy online users are very much involved in other media as well. So, as Yang and Coffey (2014: 44) said, "network executives should stop viewing web platforms as a threat to TV programming, but rather a complementary channel to attract more viewers". Ha et al. (2013), Phalen & Ducey (2012) and Weprin (2008) also showed how online audience can complement television audiences. According to comScore, multiplatform viewers spend more time engaging with content than single platform viewers (ComScore 2015). So broadcasters should find ways to obtain revenue from these new audiences apart from the traditional ones.

The traditional revenue stream for the broadcasting industry has been advertising and its goal is to maximise audiences. That's why Napoli (2010) talks about "audience products". Media products can be described as dual goods (Picard 1989) with two basic dimensions: they are content for audiences and generate attention-time by such audiences for advertisers, so to some extent audiences have enjoyed free-of-charge television programmes by giving part of their time (Nieto 2000).

To facilitate the buying and selling of advertising, the media

market needs accurate information about the audience (Portilla 2007; Napoli 2010; Webster 2014). These data set prices and therefore serve as currency for the advertising market (Buzzard 2012). For TV the predominant system of measuring audiences is based on meter panels, such as those used by Nielsen, Kantar Media, Gfk and Ipsos (Portilla 2015).

As the nature of TV consumption has changed, the first question to be answered is how to monetize online audiences (Zucker 2008). Contrary to the disruption theory and "displacement effect" (James et al. 1995), some authors see online consumption as complementary to television viewing. As pointed out by Medina et al. (2015), from a media economics perspective, it seems clear that there are enough reasons to believe in multiple synergies between broadcasters and online video delivery. Engagement and branding seem to be the most valuable benefits which should be monetized. Where there are opportunities for additional consumption and additional audience value (Doyle 2010: 444), there are ways to monetize.

The aim of windowing strategies is to achieve maximum economic profit from a single product by distributing it in different windows and at different times (Owen & Wildman 1992: 26-38). The existence of such strategies proves that the value of a television product does not come to an end with its first broadcast (Dunnet 1990: 39).

There are therefore new sources of revenue and new audience data are needed. If there are multiple ways in which audiences can access the same content, traditional audience measurement should change (Bermejo 2009; Taneja & Mamoria 2012; Echegaray & Peñafiel 2013).

Laptops, tablet devices, smartphones and smart TVs are alternative screens which allow audience mobility (Schneiderman 2012; Council for Research Excellence 2013; Diego et al. 2014; Hassoun 2014) and generate "place shifting" (Buzzard 2012). We can also view programmes at any time and the traditional meters, which "took into account the programme's hour of emission in order to measure the audience" (Portilla 2015: 78), are not useful anymore.

Audience measurement review

Broadcasters need to know their audience in order to offer the best content in the most appropriate schedule and reach the most valuable audiences (Balnaves 2011; Berné et al. 2013). Audience data also facilitate the buying and selling of advertising in commercial media markets (Portilla 2007; Napoli 2010; Webster 2014), setting prices for the advertising market (Buzzard 2012). Offering reliable audience data is therefore fundamental for the commercial television market (Webster et al. 2014). If online video content aims to achieve commercial revenue, then audience data are required. However, measurement in the digital era is not easy because videos are consumed on a range of screens and at different times.

There are various systems to measure the audience of online video content. One possibility is the Audio Matching System (AMS), identifying content with audio data. The most recent

systems assign an identifier or tag (an audio watermark) to each piece of content that is matched with the channels broadcasting in order to identify the content viewed (Unitam 2009; Kantar 2012; Nafria 2016). In the UK, BARB is already testing the use of identifiers to report “consumption of online TV content in TV players controlled by the broadcasters” (Barb 2015). The project is called *Dovetail* and is being carried out by Kantar Media and Nielsen. The data are based on tags and a combination of internet census data and demographics from the panel (Barb 2015; Portilla 2015). This is called hybrid measurement. Kantar Media and comScore are also testing this combination of data and the use of tags (Goode 2015).

Portable people meters (PPM) are another possibility (Portilla 2007). Ipsos's *MediaCell* captures exposure to encoded audio signals by uploading software into the panellists' smartphones. The advantage of the cell is that people take the meter everywhere without requiring any extra device, unlike previous portable people meters (Portilla 2007). Nielsen is also testing mobile/web apps to replace paper diaries to measure TV audiences in the US local market (Shagrin & Link 2013). The problem is that the audience figures generated by traditional meters and newer passive devices can vary, sometimes considerably (Green 2011).

Kantar Media also tested a PC meter system to measure online activity, installing software among some of their Spanish television meter panellists (Nafria 2014). This is Kantar's Virtual Meter technology. However, Kantar has since moved from this project to hybrid measurement with comScore, combining census data from the internet plus demographics from a panel of users (comScore 2015; Nafria 2016).

In brief, the measurement of online video consumption across multiple screens is still a challenge and the main market research companies that measure audiences are still trying to find the best system. At the same time advertisers are also taking a close look at the proposals because they do not want new metrics. Advertisers are promoting projects that use the existing metrics for cross-platform audience analysis (ESPN 2013). Achieving a consensus among participants in the media market is therefore the key.

3. Methodology

Our general proposal is to carry out a critical analysis of the audience data needed to monetize online video content. This critical analysis will follow the inductive methodology used in previous papers (Medina & Portilla 2015). The case of study will be Atresmedia. We will study its digital development, its monetization strategies related to online video and the data required to do so.

We will combine the direct observation of the digital strategy of the group with an analysis of internal reports and sales brochures from May 2015 up to May 2016. This information is completed with seven personal interviews and meetings.

Three executives from Atresmedia (González-Pacheco 2015; Mira 2015; Larrainzar 2016) provided an overview of the company's digital strategy and also commercial information from Atresmedia Digital (2015). Four executives from the media industry (García-Lastra 2016; Martínez 2016; Ventosa 2016; Vega 2015), experts in media, audience research and online strategies (García-Lastra 2016; Martínez 2016; Ventosa 2016; Vega 2015), provided an external view to validate the strategies and proposals of Atresmedia.

4. The case of Atresmedia

The origin of Atresmedia was Antena 3, a television channel that started in 1989. As a result of the digital switchover, in 2010 it launched another three digital terrestrial channels and in 2012 merged with another private television company Gestora de Inversiones Audiovisuales La Sexta and its four digital channels (Atresmedia 2012). Since then, the group has increased not only its number of television channels but also video deliveries and radio stations.

In this section we present the digital strategy of the broadcaster Atresmedia in chronological terms. Afterwards we will explain how the group is monetizing its online video content and the audience data used by Atresmedia for its strategies.

Atresmedia's digital strategy

In 2007 Atresmedia launched different online services and started its *Multimedia Division* with 50 employees, around 2% of the overall workforce (Antena 3 2007). It was the first television company in Spain - second in Europe after the BBC - to launch a channel on YouTube. It also launched Tuclip.com, a platform for videos sent by viewers, and a channel called Tucanaltv, composed of the finest videos from Antena 3, such as news, humour and entertainment. In addition, partners were incorporated with a revenue model providing new income for these companies while also increasing traffic for the Antena 3 group. This represented a way to provide access to all the audiovisual material available online.

Since 2009 it has developed a *strategy 3.0*, delivering content through three different platforms: television, internet and mobile devices. With this strategy, the company has tried to show viewers that it's not just a television channel but also a multimedia company. Interactivity and cross-consumption were developed.

By 2010 most households in Spain had a digital television set. Each company received a multiplex license, allowing them to own and manage four separate channels. As a result Antena 3 developed three other specialized channels: Nova for adults, Nitro (now Mega) for young adults and Neox for children. In 2012 it acquired the channels of La Sexta, a relatively new television company owned by the producer Globomedia and the sports rights agency, Mediapro. All the digital channels were marketed by Atresmedia Publicidad.

The group produced online series such as *Desalmados* and *Diarios de la webcam*. The latter was so successful on the internet that it was subsequently broadcast on Neox.

In 2010 the company launched a new site called www.antena3.com, where it was possible to access to catch-up TV. A *Community Manager* was also hired to manage all these sites and posts.

Social media became a new tool to interact with the audience. According to the internal data of *Atresmedia* from *Socialbakers* (Atresmedia 2015: 18), in 2015 all its official accounts on Facebook achieved 4 million fans and 3.1 million followers on Twitter. These social media accounts made it possible to send comments to the channel and share content with other users.

The company also developed several blogs that became vertical portals. Some of them were related to its own content or different general topics such as fashion, current affairs and sports. To increase interactivity and audience participation, video-meetings were created to chat with actors, singers and

writers, and to play online games related to the TV shows.

The company created two apps for mobile devices. In 2012 *Atresmediaconecta* appeared, offering access to extra content related to television programmes. In 2013, *Atresplayer* was launched, giving access to all its television channels. The same year the group changed its name from Antena 3 to Atresmedia.

The company started to experiment with premium content through Nubeox, which was an online video store that could be used directly through a Smart TV. However, this was absorbed by *Atresplayer* premium, which is a pay service for international fans of the Antena 3 series.

In 2014 the group launched new alternative windows such as *Atrestube*, a multichannel by Atresmedia on YouTube, with more than thirty channels with in-house produced content. According to the internal data of *Atresmedia* from *Socialbakers*, in 2015 the *Atrestube* channels reached 1.7 million subscribers (Atresmedia 2015: 18). In June 2014, Atresmedia launched *Aunia*, which is a joint venture with Mediaset, its direct

Table 1. Atresmedia digital products (2015)

Platform to deliver digital content	Type of content	Commercialization
Broadcasting Antena3 Neox Nova Mega La Sexta Atreseries	TV content: own and commissioned	Advertising
Social media		
Facebook Twitter	Dialogue and links to content	Amplify Twitter amplify*
Atrestube Flooxer	TV content	Advertising
Blogs and vertical portals (13)**	TV Content	Advertising
	UGC	
	Third parties (commissioned)	Sales
Web www.antena3.com http://www.lasexta.com/ http://nova.atresmedia.com/ http://neox.atresmedia.com/ http://mega.atresmedia.com/ http://atreseries.atresmedia.com/	Information and links to content	Advertising Product Sales
Apps		
AtresPlayer	TV content	Advertising
Atresconecta	Extra content	Email marketing
Other	Other	PPV or subscription fee

* Twitter Amplify enables media companies and brands to capture the excitement on TV and distribute it to fans and audiences across *Twitter*, beyond their followers (<https://biz.twitter.com/es/twitter-amplify>)

** <http://anime-manga.atresmedia.com/>; <http://deportes.atresmedia.com/>; <http://www.antena3.com/se-estrena/>; <http://www.tecnoxplora.com/>; <http://www.cienciaplora.com/>; <http://motor.atresmedia.com/>; <http://www.antena3.com/objetivotv/>; <http://viajestic.atresmedia.com/>; <http://www.cocinatis.com/>; <http://www.antena3.com/celebrities/>; <http://www.correryfitness.com/>; <http://www.neoxkidz.com/>; <http://www.guiainfantil.com/>; <http://www.antena3.com/defconplay/>

Source: authors, based on the internal reports (Atresmedia Digital 2015).

competitor, to manage the programmatic sales of their online services. The same year it also created Atresmedialab to explore new forms of multiplatform advertising. In 2015 the newcomer was Flooxer, an online channel for short videos produced by the company or others.

Table 1 summarizes the company's digital strategy, the content delivery and the business based on the different products. In the next section we will describe the three main commercialization strategies the company is developing for its online products.

Monetization strategies and audience data

Concerning business model innovation, Atresmedia seems to be quite active in the digital market (García-Lastra 2016). We can distinguish three monetization strategies: a) advertising, b) data-based and c) direct payment. These strategies for the monetization Atresmedia's online video content are summarized in Table 2.

a) Advertising

The first strategy used by Atresmedia to monetize its online video is through *advertising*. It uses videos to attract more visitors to its websites and digital platforms. To monetize online videos through advertising, Atresmedia uses data from comScore. This is the company selected by the association of media, advertisers and agencies to measure internet audiences since 2011 (AIMC 2011). comScore offers user profiles from panel data and census data on website pages from web analytics. This hybrid methodology is supervised by AIMC, the joint industry committee for media research.

According to comScore, in January 2015 unique users totalled 8.6 million (Atresmedia Digital 2015: 4). In the comScore ranking Atresmedia ranks 11th in terms of unique users (Atresmedia 2015: 13). Thanks to these good figures, Atresmedia offers advertisers high visibility of digital content.

As part of this strategy, Atresmedia provides free access for three weeks, looking to get the highest number of users, with viewers having to pay from then on (Larrainzar 2016). The purpose is to achieve reach, traffic and visibility that can provide word-of-mouth recommendations and, as a result, more audience for television. The number of users attracts advertisers to Atresmedia websites and digital platforms while social media accounts are also used as a marketing tool, leading users towards online video content.

According to the group, comScore provides the necessary data, including the number of visitors, pages, average visit time and also the demographic profiles of PC and mobile users (Atresmedia 2015: 17). However, the IOS mobile panel in Spain is not complete and the tablet panel will not be ready until 2017 (Agulló 2016).

Data coming from digital consumption is also used to develop *programmatic sales*, a real-time marketplace thanks to knowledge of consumers. Online consumption therefore contributes to more qualitative sales and to achieving zero television consumers (Mira 2015).

The cost per thousand (CPM) for video is €10-12 and for graphic €2-4; obviously much cheaper than for traditional broadcasting. Atresmedia reached 96.1 million video downloads in April 2015. For Antena3.com the figure is 30 million downloads and for Lasexta.com the figure is 1.3 million (Atresmedia 2015:15-16). The rest of the downloads come from other brands of the media group related to radio.

These videos can include commercials, so the company can sell online video as an advertising medium. At the moment the download figures are given by comScore for PC and mobile but not for the growing tablet market. Here the "Total View" data provided by the Kantar Media and comScore hybrid proposal would be very useful as they would aggregate the cross media audience data for video content (Nafria 2016), but as Martínez (2016) outlined recently, these are not yet available.

Atresmedia also relies on internal data on visitors and downloads minute by minute. However, internal information is not a reliable source for advertisers; data cannot come solely from the supplier itself as this will always try to give the highest figures in order to ask for the highest prices. To guarantee the validity and objectivity of the data, Atresmedia should look for certification of the figures by a respected external bureau. With external support, Atresmedia could offer its digital videos as a commercial platform.

b) Data-based

Besides comScore information, Atresmedia also has its own census data. The digital division knows how many downloads are requested from each server. The company can use this information to manage its content. For example, Atresmedia can see when a video has become worn-out on one platform, with no downloads at certain times. If there are no more requests, Atresmedia could remove the video from the platform and try to sell it to other digital platforms.

Atresmedia requires *registration* for the consumption of some digital content and this extra information can provide a better picture of the audience. This is the way the Atresplayer application works. According to Atresmedia (2015:14), Atresplayer has 2 million registered users and the group provided nearly 400 million online videos in 2014. This means that Atresmedia has information from two million people, not only their profiles but also the content they prefer.

With the data from the video platform users (registered or not registered), Atresmedia can make recommendations of videos to users according to their interests, improving their experience and engagement. Users continue to consume videos and might recommend the platform to other users, increasing audience size.

Besides the marketing strategy, all these data can also be used for promotional activities. Atresmedia offers an email marketing service based on these data (Atresmedia 2015: 34). The company offers brands the possibility of sending messages to a well-defined segment of users, maintaining ownership of the data. This segmentation could even take content consumption

into account. For example, if a segment of the audience is interested in content related to travelling, this group might be an interesting target for travel agencies. This information can also be integrated with other data, such as the location data generated by mobile devices. An app like Atresplayer can register location. If its users agree to give this information, Atresmedia can segment the audience by city, type of restaurant visited or other location data (García-Lastra 2016; Mobile Marketing Association 2015). The most difficult task for Atresmedia is to manage this big data, especially when the information comes from its different online platforms (Zelenkauskaitė 2016).

The data are therefore becoming increasingly valuable and this has not gone unnoticed. As a result, in 2016 Atresmedia created the Atresdata department as an “audience finder” to achieve greater affinity (Andrés 2016). Such data can be used for all its marketing and promotional activities but not to price advertising. Internal audience data need to be audited by an external institution to be reliable for establishing prices in the advertising market.

c) Direct payment

Some services such as Atresplayer premium or accessing Atresplayer from outside Spain require a payment (Atresmedia 2016), so Atresmedia also has subscribers and pay-per-view products. Again, recommending videos based on these subscribers' interests can help to keep and also increase subscriptions. This entails the need to maintain and increase direct payments.

To recommend content, Atresmedia requires a continuous and automatic analysis of data. Again, it needs to manage big data and this task is really challenging.

In brief, as we can see in table 2, the revenue from online video can come from nine different business strategies associated with four targets. However, the data available can be improved in all these cases, a task that is the responsibility of market research companies but also of Atresmedia, which has a real chance to increase its revenue by taking full control of its internal data.

5. The Spanish case

The future of digital business in terms of broadcasters is still uncertain for the Spanish group because only 5% of the group's audience comes from digital, according to González-Pacheco (2015), General Manager of *Atresmedia Digital*. However, this is expected to grow and the reliable measurement of audience figures on the different platforms is fundamental in order to monetize the digital business.

In Spain, *comScore* provides data about the online use of broadcasters' websites and online video consumption. However, this online content is also offered on TV sets, so cross-media measurement is needed. One good option is the *Kantar* and *comScore* hybrid measurement based on tagged content that can be identified irrespective of the screen where it is displayed (Goode 2015; Nafría 2016). This kind of measurement needs the collaboration of broadcasters as they have to tag their videos

Table 2. Strategies for online video monetization. Atresmedia

	Advertising	Data-based strategies			Direct payment
		Commercialization of content	Without registration	With registration or subscription	
Business strategies	• Ads on websites and digital platforms • Achieve large audiences by giving free access and promoting through social media • Programmatic sales • Ads in online videos	• Offer worn-out content on other platforms	• Offer relevant content to keep users and attract new ones • Offer online video related to content of interest to advertisers		• Payment from subscribers • Payment from pay-per-view
Targets	• Users of online platforms • Video users	Video users		• Registered users • Subscribers	
Data available	• Visitors • Online activity	• Visitors • Online activity • Downloads • Valuable content		• Profiles • Online activity • Downloads • Valuable content	
Source	• comScore • Internal sources	Internal sources			
Challenges related to data	• Better coverage of mobiles and tablets in the comScore panel • Certification needed for internal data	Management of big data			

Source: authors, based on the internal reports of Atresmedia (2015).

so as to know what is being watched and when (Goode 2015). The problem of tags is that a common standard is required for this to be useful for market participants, implementing an open standard to identify video content but also ads (CIMA 2014). 'Currently, there is no open method for embedding persistent content identifiers (e.g., watermarks, fingerprints, etc.) into content, so that it survives, no matter how that content gets to the consumer' (Lennon 2014: 3). A standard measurement system with recognized currency throughout the platforms is required (CIMA 2014; Edwards 2012): a 'single currency and an Any Time, Any Where, Any Device (ATAWAD) measurement for all audiovisual content' (Egta 2014: 4) is required by advertisers.

Meanwhile, *Atresmedia* could use its data generated by its digital content to get advertising revenue. However, as we mentioned before, its internal information cannot be used automatically for the advertising market, requiring certification from a respected external bureau to endorse the figures.

These internal data could also be used for other activities. The group could study content downloads, make suggestions to users and increase consumption, visibility and engagement. And adequate study of the data regarding online video downloads can therefore be used to keep users and obtain new ones. *Atresmedia* could also segment online audiences and offer these to brands to send direct promotional messages. This is part of the third strategy based on the use of data. However, such strategies require the management of big data: a large volume of information, in different formats and generated at great speed.

6. Conclusions

According to Ala-Fossi and Lax (2016, 365), "a number of recent reports suggest the life expectancy of broadcasting as a free-to-air television platform may be no more than 15 years". Vega (2015) agrees with this idea, asserting that DTT will disappear in ten years and will be taken over by online TV. In this situation, content will become independent from the medium. Companies will become producers and commissioners of content and they will have to develop multimedia distribution techniques and bundling strategies. National broadcasters will become multimedia international delivery companies.

This multimedia content still includes ads, so this source of revenue will not disappear. However, it requires data on the new audiences. As Grece et al. (2015) point out, the audience measurement industry is in a state of flux. Technological developments and new consumer behaviours have led to a number of changes in the way audiences are measured. There are two main challenges for multi-screen audience measurement today: finding a device-independent measurement solution and reaching a market consensus on the methodology to be used. But "the system will not function if each media organization tries to use their own metric as the currency for their operations in the

advertising market" (Portilla 2015: 82). Moreover, participants in the media market need to achieve a consensus about tags and not only in their national markets but also internationally, because online content has no borders.

The revenue of media companies also comes from supplying high quality content and valuable services and offering branded content on the broadcaster platform should also be considered. The challenge for audiovisual companies is to generate recommendations, thereby increasing visitors and engagement. More online video users and more engagement can generate more revenue from subscription and advertising.

The third source of revenue for broadcasters comes from the data provided via online consumption. This information is of great value for internal decisions but also other activities such as direct marketing actions for advertisers. Broadcasters need to realize the value of data obtained from users of their online platforms, registered users and subscribers. Using broadcasters' data sets for other activities as targeted marketing can increase revenue and amplify their business. Broadcasters have to learn how to manage the valuable big data generated in their interaction with their online audiences.

Note

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Social and mobile TV in Catalonia. Audience and interaction in Catalan TV broadcasters' corporate mobile apps and social networks' profiles

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Abstract

This study explores the characteristics and user behaviour of 53 Catalan TV broadcasters' corporate mobile apps and profiles in social networks, including TV3, 8tv and local TV stations taking part in the Audiovisual Local Network (XAL). A quantitative methodology has been applied with content analysis, a comparison between linear and mobile consumption and the analysis of key performance indicators of interactivity in Facebook and Twitter. The results show that mobile apps have been developed for a passive user and that the audience profile of these apps is mainly composed of men between 25-34 years old. The networks' communities are rather inactive with a greater interactive level on Facebook and a level near to 0% on Twitter.

Keywords

Television; Social Audience; Facebook; Twitter; Mobile Apps.

Resum

Aquest estudi aborda les característiques i el comportament dels usuaris de les aplicacions mòbils i dels perfils de xarxes socials corporatius de 53 televisions catalanes: TV3, 8tv i les televisions integrades dins la Xarxa Audiovisual Local (XAL). S'aplica una metodologia quantitativa amb una anàlisi de contingut, el creuament de dades de consum lineal i mòbil i l'anàlisi d'indicadors de desenvolupament del nivell d'interactivitat de les comunitats d'usuaris a Facebook i Twitter. Els resultats mostren que les aplicacions mòbils han estat desenvolupades per a un tipus d'usuari passiu i que el perfil d'audiència d'aquestes aplicacions està format majoritàriament per homes de 25-34 anys. D'altra banda, les comunitats en xarxa es mostren força inactives, amb uns nivells d'interacció majors a Facebook i propers al 0% a Twitters.

Paraules clau

Televisió, audiència social, Facebook, Twitter, aplicacions mòbils.

Introduction

As García Torres (2015) explained, the latest changes in the media environment have not been progressive and have created a quick hybridisation of media towards new formats and platforms. This transformation affects radio, television and the Internet, although we can state that the latter two have suffered the most significant change - TV becoming *social TV*. This phenomenon brings new rationales into content production, media communication with the audience and, more specifically, the transformation of public consumption habits (Lin, Sung and Chen 2016).

Consequently, major opportunities have been created for TV broadcasters. Financially, it is worth highlighting the

distribution by over-the-top (OTT) systems and the growth of new digital native services. From a production point of view, new ways are open for the development of interactive products and platforms (Gómez-Urbe and Hunt 2015). In terms of promotion, social networks allow the (1) opening of a direct communication channel between the media and the public and (2) the channelling of on-line discussions about content in order to obtain data on audience preference (Bonini i Sellas 2014).

Optimising audience measuring systems, together with the new generations' multi-platform consumption, drives TV broadcasters to create or renew web spaces, mobile apps and social network presence and usage. Thus, public corporations, with the British Broadcasting Corporation (BBC) and the Finnish Yleisradio (YLE) at the forefront, have shown a great

capacity to adapt to this new paradigm (Van Dijck and Poell 2014). Conversely, public initiatives related to the social TV phenomenon in Spain are reduced to the innovation and interactive labs of Radio Televisión Española (RTVE) and, at a local level, to the strategies and products developed by the Corporació Catalana de Mitjans Audiovisuals (CCMA).

In this context, a social TV study recently published by the Observatori de la Producció Audiovisual (OPA) opened a line of research due to the lack of investigations applied at a national level and, more specifically, to the Catalan environment (OPA 2016). This study analyses in depth the integration of the Catalan TV system into the social TV model in web pages, social networks and mobile apps. The OPA reaches the conclusion that Catalan TV broadcasters show a low integration level, particularly when developing participation tools for web pages and mobile apps, compared to other corporations whether in the European arena or privately owned.

The results of the study show the need for this article, whose aim is to compare the characteristics of the corporate mobile apps and profiles of TV3, 8tv and TV stations in the Audiovisual Local Network (XAL) with their user consumption and characteristics with a view to establishing the relationship between the TV broadcasters' low integration in these platforms and public usage.

Conceptual Framework

Social TV is a recent phenomenon, both in professional and academic environments, and the model definition is still an open discussion depending on the study field used to approach it (González-Neira and Quintas-Froufe 2015). From a technology point of view, authors such as Krämer et al. (2015) consider social TV as a set of physical and digital tools enabling communication between audience and media. On the other hand, Carpentier (2012) or Hallvard, Poell and Van Dijck (2015) understand that this phenomenon must be defined according to the socialisation processes facilitated by the digital tools, connecting and organising user communities around the TV content. Finally, there is also a current trend towards a definition where Twitter is the ultimate social TV tool, with no consideration for other environments (Harrington et al. 2013; Deltell Escolar 2014). In any case, social TV is ultimately defined as a set of physical and digital tools that allow the audience to participate or interact with the media or the content through web platforms, social networks or mobile apps, and that operate as second screens, parallel or asynchronous with live broadcasting.

The development of social TV programmes is linked to innovation as a key foundation for the new content offered. This spirit of renewal has been historically related to public services, particularly during the monopoly stage before the deregulation that took place as of 1980. Currently, both public and private broadcasters face the need to offer communication channels

and contents as well-adapted as possible to new audience needs. According to Cesar and Geerts (2011), in terms of social TV, this means creating and using social network profiles where the target audience is concentrated, as well as using web spaces and mobile environments to offer tools to:

- **Deliver the content**
- **Synchronise and update content** simultaneously with user consumption
- **Facilitate internal communication** between users on the same platform by tools such as chat
- **Drive a reaction or the participation of user communities** around specific contents or programmes

In the Catalan environment, authors such as Bonet et al. (2013) state that the CCMA has been at the forefront of web space renovation, social network strategy approaches and mobile app offerings. Despite this, the situation at a national level is still in its budding stages and we can only find isolated experiences of adaptation to the social TV model. Galindo, Fernández and Alameda (2014) analyse the case of the second screen apps *Atresconecta*, *MiTele* and *RTVE*, amongst others, and reach the conclusion that they do not attract the user's attention and generate an exhaustion effect when used daily. According to the authors, this is due to the lack of novelties in the apps or the low quality of extra content offered. Lastra (2016) talks about other experiences integrating web, mobile apps and social networks, such as that related to the historical fiction programme *El Ministerio del Tiempo*, that, according to the author, confirm the interest of producers and RTVE in creating attractive content for the digital public, even if she clarifies that such products are still at an integration stage in the Spanish audio-visual industry. Finally, the OPA (2016), in the first part of its report on social TV in Spain and Catalonia, also notices that web platforms and media versions from corporations such as Mediaset, Atresmedia, or even CCMA, are easier to find at a second screen integration stage because of their Video on Demand service functionalities. Having said that, it should be noted that CCMA made considerable investments for the development of interactive contents (e.g. *Amb Títol*) and transmedia (*Em dic Manel*) in order to reach multi-platform consumers.

Along this line, TV hybridisation has driven important changes in audience conceptualisation. Enli (2008) and Livingstone (2013) state that new media gave rise to new audiences and, they add, we have moved from being passive audiences to active users, from a broadcasting model to a multimedia one and from unilateral to bidirectional communication that feeds back through the networks. In turn, Syvertsen (2004), Siapera (2004), Meijer (2005) and García Avilés (2012) define a new classification of media demographics. The new types group the audience or users according to their TV content and platform usage and their relationship with the media. More specifically, 10 different user profiles are defined based on their own characteristics, as show in the table below.

Other studies, like the one conducted by Gómez-Domínguez, Besalú-Casademont and Guerrero-Solé (2016), demonstrate in their social audience analysis that there are significant differences in audience participation too, depending on the media system (Hallin and Mancini 2004). Thus, in line with Buschow, Schneider and Ueberheide (2014), the study concludes that the English-speaking public shows a greater tendency towards *social* participation than the Spanish or Catalan public. On the other hand, more active audiences seem to be associated with specific genres such as news and entertainment and, more particularly, with TV reality formats (Gonzalo Berrocal et al. 2014). Data obtained from the annual directory *A year in the life of TV and Twitter in Spain* (Kantar 2015) confirm this fact

too, sustaining that up to 25.1% of the activity is concentrated around reality shows (*Gran Hermano VIP* or *Mujeres, Hombres y Viceversa*), and up to 34.1% corresponds to the factual genre (*Al Rojo Vivo*, *La Sexta Noche* or *7D: El debate decisivo*).

In short, Segado, Grandío and Fernández-Gómez (2015) stressed the importance of increasing social TV phenomenon studies, a growing field of research. Likewise, authors such as Hallvard, Poell and Van Dijck (2015) and Lin, Sung and Chen (2016) insist that the subject of study should not only focus on the media, but it should also include the users-audience. This is the reason why we have decided to make a double analysis in this study.

Table 1. Classification of user profiles based on activity level (action) and their defining characteristics

Action	Profile	Characteristics
Passive	Consumers	The media establishes a passive exchange relationship of linear and/or digital content with the audience. This relationship does not consider any involvement or interaction of the users with the platform, app or network that the media makes available to them. In any case, this is the most common and classic audience profile.
	Players	User whose interaction is based on leisure. This considers, beyond the game options that the different programs offer to the public, the classic vote as a participation tool. Voting allows the audience to establish a direct relationship with what is decided (e.g. evicting a contestant). On the other hand, expanding contests to the web spaces creates a wide range of possibilities, allowing the public to feel part of the “game”.
Active	Fans	This demographic is defined as an individual or a group that follows specific contents, presenters, actors, collaborators, etc. This relationship is driven by the operators, as the users generate great visibility of those things they admire. Participation is channelled through interview programmes, extra content or using social networks as a second screen programme.
	Commentators	Users that act using specific tools or platforms provided by the programmes, operators or others to comment, criticise, suggest or share their point of view, self-generated contents or qualifications. Social networks play a middle-man role for this audience profile. Some programmes insert the networks comments directly (section) or indirectly (titles). This profile provides valuable information for the media about the content acceptance level.
	Citizens	User participation in programmes broadcasting content related to public affairs topics. It can be classified as a profile linked more closely to the news genre than to entertainment. Includes direct participation in formats where the viewer is a core part of the programme development and, externally or indirectly, the viewer participates through specific platforms or tools (e.g., sending questions to a guest being interviewed)
	Collaborators	The public plays the role of the content producer in any type of format or topic. In this profile, the information sent (photos or video clips recorded by amateurs) is used in key sections of different programmes.
	Benefactors	Users that participate in solidarity-related stations or programmes. This interaction promotes a social responsibility relationship between the collaborating viewers and the media as a result of a social need.
	Activists	This profile is related to the association of viewers with protection and defence collectives watching over the contents in order to safeguard the quality standards, pluralism and diversity specified as consumers. A key concept used to define this profile is the “mobilisation” capacity.
	Educational audiences	This profile can access, through a web platform, large amounts of educational material which may or may not be related to the station or programme content. This type of audience matches that of public service media more closely, and it is usually associated with children or young demographic segments.
	Cybernauts	Multi-user profile encompassing the main activities that the audience may carry out on the media web platforms or mobile apps. It includes activities such as downloading add-ons, using search tools or sharing content in social networks.

Source: Personal compilation from Syvertsen (2004), Siapera (2004), Meijer (2005) and García Avilés (2012)

Objectives

The study has set itself the general objective of examining the level of correspondence between the adaptation of Catalan TV channels to the social TV model and the user consumption and interaction level in these fields. This general objective is based on the following specific objectives:

1. To analyse the configuration of corporate mobile apps of Catalan TV channels as participation tools, in order to classify them according to their target user profile.
2. To examine audience data from Catalan TV channel corporate mobile apps.
3. To compare the user profiles of mobile apps and linear audience data from TV in Catalonia in order to identify similarities and differences.
4. To analyse how users utilise corporate social networks to check the level of interaction with production (Facebook entries and Twitter Tweets).

Methodology

Sample

The study applies to two territorial levels of the Catalan TV system, the national level and the local level. The selection of this set of Catalan television channels ahead of others belonging to the Spanish State responds to diversity and reference criteria. Thus, the Catalan TV system is the one having a greater number of local TV channels in Spain, which brings a wide diversity of business, budgeting, programming and target audience models (Bustamante 2013; Micó and Masip 2014). In addition, experiences in the development of new community and local TV channels caused Catalonia to become a benchmark within the European environment as well (García Reguero and Sáez 2012). On the other hand, TV3 is the mostly watched regional TV channel in Spain, and corporation media have a guarantee of content quality in the ratings given by the audience (CCMA 2015).

Equally, the sample has been selected from the map *Televisió de Catalunya, 8tv i la Xarxa de Televisions Locals* prepared by the OPA. The map shows a total of 53 TV channels, including Televisió de Catalunya (TV3), 8tv and TV stations taking part in the Audiovisual Local Network (XAL). With regards to ownership, there are 31 private and 22 public TV channels. In terms of adapting to new media, it should be noted that only 24 offer live broadcasting, on demand service or VOD and streaming.

Within this sample of TV channels, we selected two of the three typical areas of social TV: social networks and mobile apps. We left websites aside, as we consider that most studies on TV and new media have already focused on this area (Meso Ayerdi and Larrondo Ureta 2010) from analysing image files, covering aspects of usability and technical quality, to the interaction and participation possibilities (Rodríguez-Martínez,

Codina and Pedraza-Jiménez 2012, OPA 2016). On the other hand, the relationship between social networks and TV from the point of view of users and the relationship between available participation tools on mobile apps and the characteristics of the audience continues to be a research field being explored (Van Dijck and Poell 2014).

It should be also noted that corporate mobile apps only available on the Android system are analysed, instead of programmes, as, with 1.4 billion users (Barr 2015) they are the most widespread. With regards to the type of app, the corporate app acts as the main Web portal (*home*) or official profile in the mobile environment. Therefore, it is the app that contains the content produced by all programmes of the different channels grouped under the same broadcaster. We have also examined the official corporate profiles of TV channels available on the massive Facebook and Twitter networks. We should add that 46.7% of Spaniards accessing the Internet used social networks in the past six months and, out of these, 91.5% use Facebook regularly and 18.3% use Twitter (CIS 2016). The relevance of these profile types, as opposed to theme accounts, lies in the fact that publications gather information on all media programs and channels, creating a reference framework and a method of public communication with users.

Data collection and processing

The methodological implementation of this study is based, firstly, on a content analysis of mobile apps to classify the target audience based on the interaction and participation options offered to the user. Audiences are classified according to the classification of users added and defined by Syvertsen (2004), Siapera (2004), Meijer (2005) and García Avilés (2012) as detailed in the previous section. Even though one user can be classified into several profiles, our analysis selects only one, considering first the primary target audience of the corporate mobile app according to the content offered and, secondly, the features offered by the app to users (e.g. use of VOD, participation in contests, communication with the media and other users, etc.).

At that point, corporation social and mobile audience data are captured and compared. Captures were made between 4th and 10th April 2016 from the website MOBBO to ensure its validity. MOBBO belongs to a company specialised in data processing and business solutions, Big Data Technologies Ltd, whose aim is to show updated data on age, gender, the user's access device, downloads traffic and app ratings to developers and managers of mobile environment companies.

Social audience data have been extracted from the Fanpage Karma web portal for the period between 13th March and 13th April 2016. Fanpage Karma is a start-up or emerging company offering social network services to media (such as the German TV RTL or the newspaper *Frankfurter Allgemeine*). The company has generated Key Performance Indicators (KPI) reporting on user behaviours with specific profiles and/or posts. Using KPIs to measure the level of systematic achievement of

complex objectives is common in the field of social sciences, as demonstrated by authors such as Fernández-Cavia et al. (2014). This study used two KPIs to measure the users' level of interactivity with the posts from the corporate Facebook and Twitter profiles of Catalan TV channels. The elements and the calculation of each one of them are summarised below:

- Facebook post interaction, calculated as an average of all interactions where the Likes, Share and Comments are added per follower or post.
- Interaction with Twitter posts or tweet interaction, calculated by dividing the total number of reactions (tweets, retweets and favourites) by the total number of comments posted by the profile of each TV channel and finally by each follower.

Comparative data for Catalan linear audiences were obtained from Kantar Media (a company authorised and audited in Spain to provide this measurement service) via the Gabinet de Estudios de Comunicación Audiovisual (GECA). Specifically, information was collected for the study comparisons during March 2016 on the TV audience profile in Catalonia with regards to the gender and age variables.

Results

Mobile apps. User profile and space configuration

Only 10 TV channels out of 53 were found to have their own app. In addition, it would be necessary to add the app developed by the Audiovisual Local Network (xip/tv), which provides access to content from all local TV channels affiliated to the network. As the following images show, the mobile app settings and features they offer users are intended for a passive

audience of a consumer nature. Opportunities to participate with the contents or with the media are virtually non-existent, except for the TV3 audience assistance section or links to the social networks of Girona Televisió or Mola TV.

The images confirm that they are container-apps designed as an extension of TV broadcasters' VOD services. None of the mobile spaces analysed show tools for interactivity. In all of them there are options to share content on social networks, but it is not possible to find features associated with a greater participation, such as communication with other users, the creation of a community or content sync.

Moreover, looking at the information on downloads in the Android system (see Table 2) it is possible to observe how the TV3 app is the most downloaded (according to Mobbo, more than 500,000 have been registered), followed by that of 8tv (with over 50,000 downloads). Among the local TV apps, BTV stands out (over 5,000 downloads). Conversely, HDigital, TV de Vilafranca and Teleb apps registered less than 1,000 downloads each. It should be noted, again, that we refer to corporate apps, not to apps of specific programmes that belong to any of these TV channels.

The information provided by Mobbo indicates that the age of the people who downloaded corporate apps from Catalan TV channels through the Android system stands, on average, in the range of 25 to 34 years old and this includes approximately 30% of the downloads. The age brackets of 18 to 24 years old and 35 to 44 years old represent around 25% of the downloads each, while the remaining age groups (excluding underage youths, as there are no data available for them) show much lower download levels (gradually lower as the age gets higher) (see graph 1) Regarding the gender profile, almost two-thirds of downloads were carried out by men.

Image 1. From left to right, app of Televisió de Girona, L'Hospitalet TV and TV3



Source: personal compilation from the apps.

Table 2. Downloads of mobile apps of TV channels in Catalonia (Android systems)

TV Broadcaster	Downloads
TV3	> 500,000
8tv	> 50,000
BTV	> 5,000
xip/tv	> 1,000
TV Girona	> 1,000
VOTV	> 1,000
Televisió de Vandellòs	> 1,000
Mola TV	> 1,000
L'HDigital	> 500
RTV Vilafranca	> 500
Teleb	> 50

Source: Personal compilation based on MOBBO data.

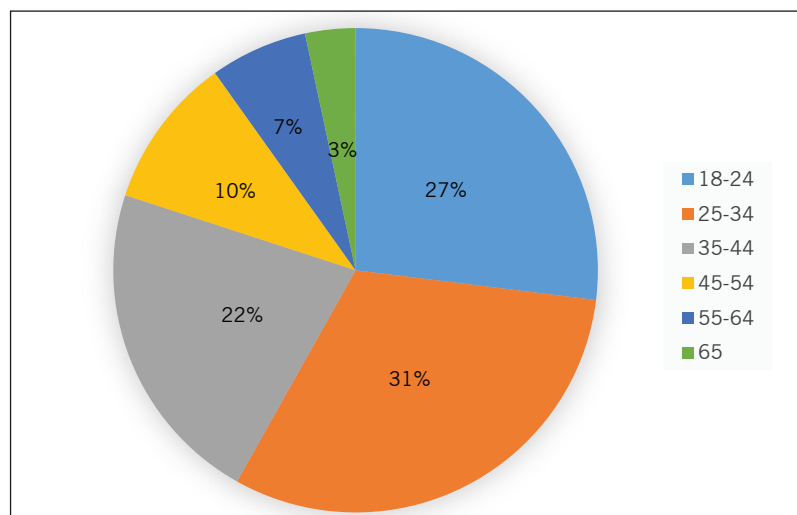
If we compare the data related to the profile of the audience downloading apps from TV broadcasters with the profile of the audience for conventional TV broadcasters in Catalonia, it becomes clear that there are significant differences. According to Kantar Media data, in March 2016, viewers between 13 and 44 years old accounted for just 29.3% of the TV audience in Catalonia, compared to the 65.7% of viewers exceeding that age. With regards to gender, 53.3% of the viewers were women. Therefore, this profile is actually the opposite of that for viewers downloading apps from the TV channel. In addition, considering the two stations with data available on the specific profile of their audience (TV3 and 8tv) it can be observed that the ageing of their viewers is even greater, with almost 50% of their audience over 64 years old in both cases during March 2016; while the presence of the female audience is also greater

than that of TV as a whole (over 55%) (Data from GECA-Kantar Media). However, according to Mobbo, the age profile of people downloading apps from these stations corresponds, by more than 60%, to men under 45 years old. Thus, and despite the precautions necessary to compare data from very different sources and collection techniques, it seems evident that there is a clear opposition between the type of people mostly watching TV using the conventional means and people downloading apps from TV stations (consequently, it can be assumed that they will be more likely to consume TV in this way).

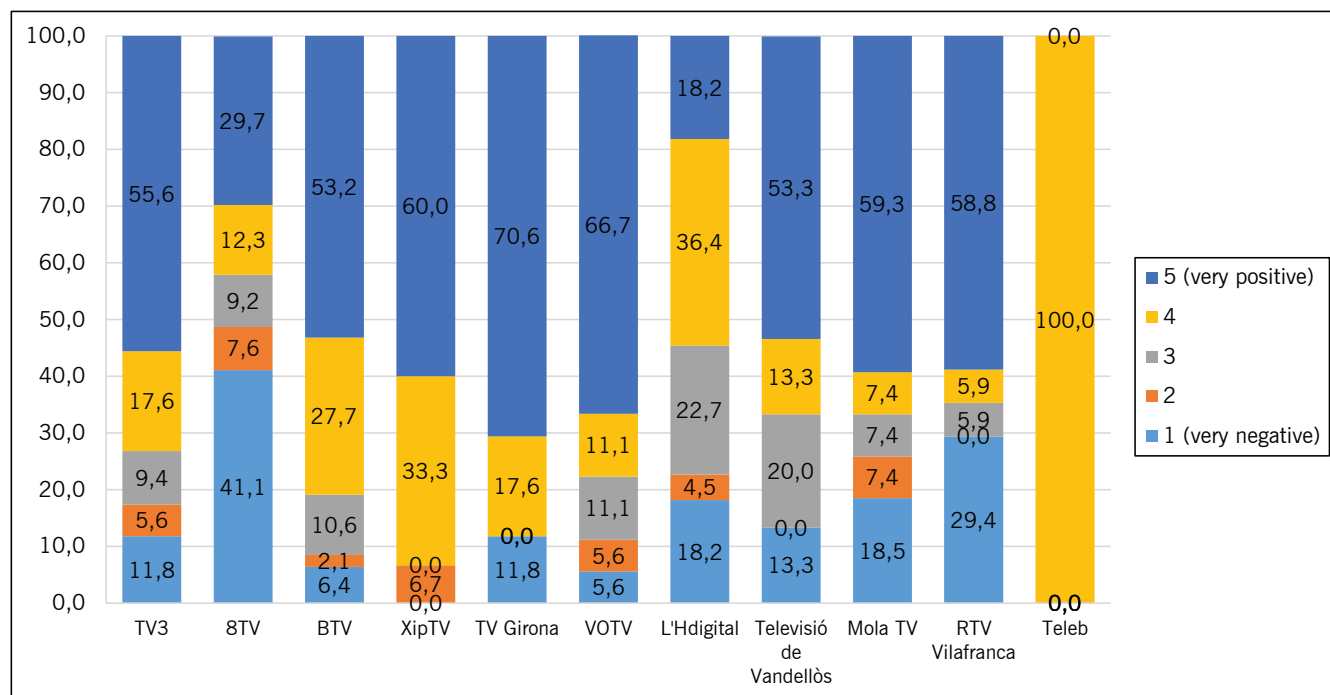
Finally, with regards to the ratings made by users of the apps analysed, it should be noted that they were very good in general. Thus, most of the ratings stood between 4 and 5 (on a scale of 1 to 5) for all apps, with only one exception: 8tv app, rated at 1 by 41% of the users. The best rated apps were those of TV Girona (70.6% of the users rated it 5) VOTV (66.7% of the users rated it 5) and xip/tv (60% of the users rated it 5) (see graph 2). However, it should also be taken into consideration that it is expected that the most downloaded apps, such as that of TV3, have a lower rating in comparative terms, as the fact of having a wider audience obviously causes higher criteria differences in the ratings. In this sense, the poor rating of 8tv is surprising.

Social audience. Community interaction and features

The presence of the analysed TV broadcasters in social networks stands at 86% on Facebook and 90% on Twitter. If we take the number of followers of each corporate profile as a factor of audience measurement, we find out that most TV channels do not have more than 500 followers on Twitter (17%) and between 1000 and 1500 on Facebook (25%). These figures can be considered low when compared to the potential audience (population) in the area where TV channels broadcast. For example, 25 Televisió (25TV),

Graph 1. Age profile of people who download mobile apps from Catalan TV broadcasters (Android systems)

Source: Personal compilation based on MOBBO data for March 2016.

Graph 2. Rating of mobile apps of television channels in Catalonia, using a scale of 1 to 5 (Android systems)

Source: Personal compilation based on MOBBO data for March 2016.

which broadcasts in the region of Barcelonés, only has 108 followers on Twitter.

In any case, the results for TV channels with the highest number of followers show the same trend in relation to the population: TV3 profiles on Facebook and Twitter have 412,000 and 325,000 followers respectively. These are low figures considering that the potential audience of the station is the whole Catalan population. These results are generalised in the whole sample and that is why we can state that there are significant deviations between the social audience and the potential audience of the TV channels analysed.

The behaviour of these social audiences or network communities also shows significant differences between the profiles, both on Facebook and Twitter. It is important to clarify that the aim is not to rate the ways and quality of these communities' involvement, but their level of engagement with the station, which they demonstrate by means of a greater or lower interaction level with their posts. For this rating we applied the Fanpage Karma formulae mentioned previously.

The social audience of Facebook profiles has a low level of interaction. Thus, TV channels as a whole accumulated an average of 0.33% interactions. In short, this means that the interaction of all followers with the total posts does not reach 1%. In detail, VATV and Canal Camp are the stations with the best ratings, registering 2.3% and 1.79% respectively. This contrasts with the results of El Prat Televisió, Vallès Visió, 25TV, Molins de Rei Televisió, Canal Taronja Catalunya Central and Televisió de Girona, which have a null or 0% equivalent

interaction. The following table shows the number of followers and the rate of interaction with TV posts.

Table 3 allows us to reach the conclusion that the number of followers is not indicative of a more active community. In this sense, it seems logical that TV channels with larger communities enjoy lower interaction, as one is more likely to find an occasional user profile. In this regard, TV3 is proof that despite having a large community with 423,505 users, a situation close to a null interactivity can occur, with a rate of 0.05%. This situation is also observed in BTV (10,674 followers) and in the private channel 8tv (7,653 followers) with an interaction of 0.1% in both cases.

As for the interactivity rates of Twitter users, it should be noted that they are similar to those of Facebook, that is, in this case the relationship between the number of followers, the potential audience and the interaction rate is not proportional. We can find cases such as Mollerussa TV (@mollerussatv, 0.57%) or RTV Cardedeu (@rtvcardedeu, 0.09%), which have greater interactivity compared to others with a larger potential audience and greater number of followers, as in the case of 8tv (@8tvcat, 0.03%) or TV3 (@tv3cat, 0%).

Finally, in order to look at the differences between the interactivity levels of both social networks, we prepared a combined graph that brings together the interactivity rate of Facebook (ITFB) and Twitter (ITTW), adding the variation bars. This allows us to clearly see the gap between the communities' activity on each network.

Table 3. Followers' rates of interaction with posts depending on the number of followers and the corporate profile on Facebook

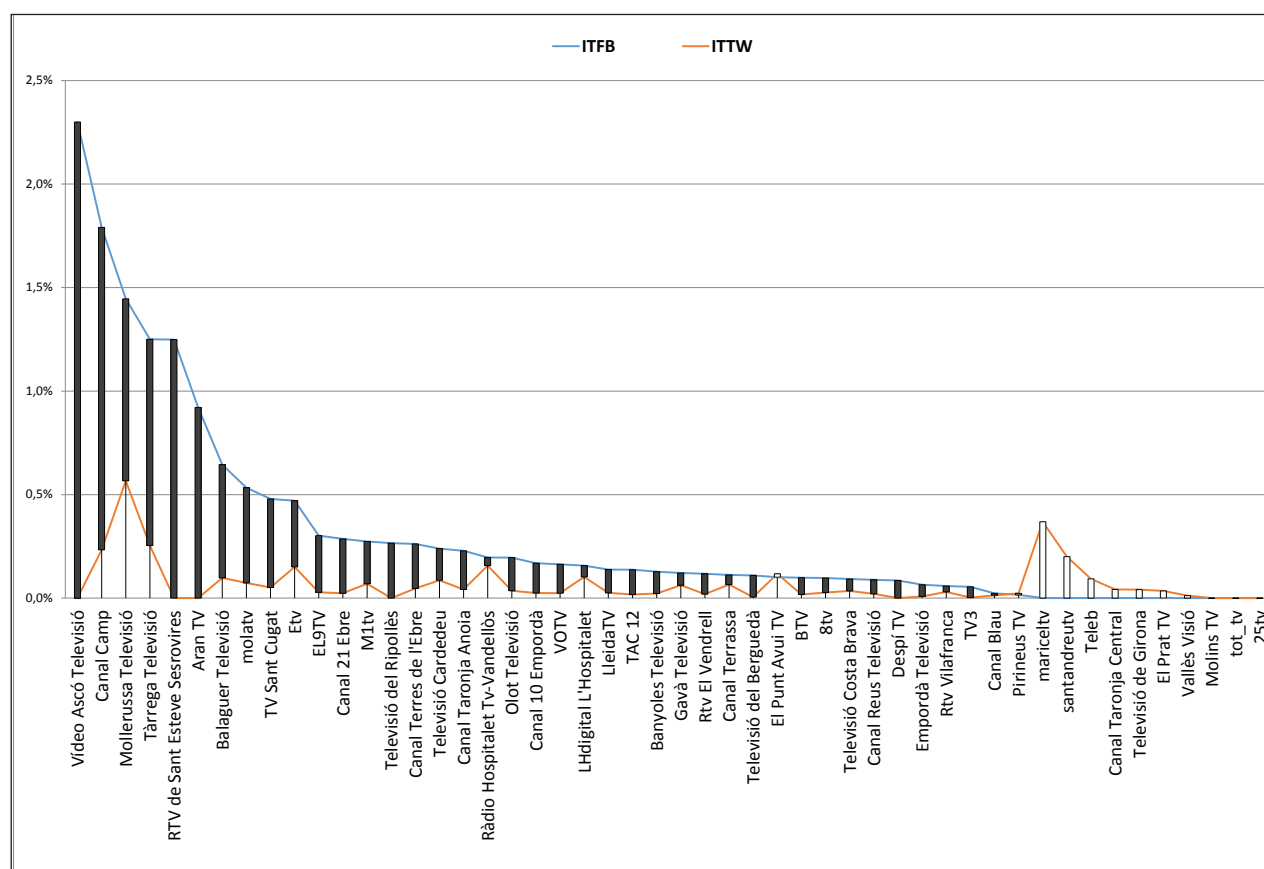
Corporate profile	Followers	Rate of interaction
Vídeo Ascó Televisió	613	2.3%
Canal Camp	508	1.79%
Mollerussa Televisió	1,414	1.45%
Tàrraga Televisió	1,889	1.25%
RTV10-Ràdio i Televisió de Sant Esteve Sesrovires	563	1.25%
Aran TV	468	0.92%
Balaguer Televisió	4,504	0.64%
molatv	2,018	0.53%
TV Sant Cugat	508	0.48%
Etv	1,210	0.47%
EL9TV	698	0.3%
Canal 21 Ebre	1,769	0.29%
M1tv	2,508	0.27%
Televisió del Ripollès	1,532	0.27%
Canal Terres de l'Ebre	5,991	0.26%
Televisió Cardedeu	1,687	0.24%
Canal Taronja Anoia	1,238	0.23%
Ràdio Hospitalet Tv-Vandellòs	3,112	0.2%
Olot Televisió	4,866	0.2%
Canal 10 Empordà	1,128	0.17%
VOTV	3,762	0.16%
LHdigital L'Hospitalet	3,809	0.16%
LleidaTV	3,363	0.14%
TAC 12	3,224	0.14%
Banyoles Televisió	1,442	0.13%
Gavà Televisió	5,221	0.12%
Rtv El Vendrell	5,072	0.12%
Canal Terrassa	5,312	0.11%
Televisió del Berguedà	5,936	0.11%
El Punt Avui TV	3,080	0.1%
BTV	10,674	0.1%
8tv	7,653	0.1%
Televisió Costa Brava	5,811	0.09%
Canal Reus Televisió	7,476	0.09%
Despí TV	1,166	0.09%
Empordà Televisió	6,734	0.06%
RTV Vilafranca	2,510	0.06%
TV3	423,505	0.05%
Canal Blau	5,150	0.02%
Pirineus TV	1,363	0.02%
Vallès Visió	1,848	0.0%
25tv	115	0.0%
Molins TV - Molins de Rei Televisió	1,130	0.0%
Canal Taronja Catalunya Central	277	0.0%
Televisió de Girona	972	0.0%
El Prat TV	2,324	0.0%

Source: Personal compilation based on Fanpage Karma data.

Taula 4. Índex d'interacció dels seguidors amb les publicacions en funció del nombre de seguidors i el perfil corporatiu a Twitter

Corporate profile (@)	Followers	Rate of interaction
mollerussatv	309	0.57%
mariceltv	1,206	0.37%
tarregatv	925	0.25%
canalcamp	370	0.23%
santandreutv	798	0.2%
tvvandellos	250	0.16%
etvllobregat	1,490	0.15%
elpuntavuitv	6,710	0.12%
lhdigitalh	3,968	0.1%
taronjaanoia	1,667	0.1%
balaguertv	2,089	0.1%
bdncom	4,223	0.09%
rtvcardedeu	1,475	0.09%
molatv	2,923	0.07%
_m1tv	4,930	0.07%
canalterrassa	6,110	0.07%
gavatv	917	0.06%
tvscantcugat	2,316	0.05%
canalte	3,630	0.05%
canaltaronja	1,497	0.04%
tvigirona	6,104	0.04%
olotelevisio	4,700	0.04%
tvcostabrava	3,140	0.04%
elprat_tv	2,210	0.03%
rtvvilafranca	4,976	0.03%
el9tv	6,060	0.03%
8tvcat	11,283	0.03%
lleidatv	6796	0.03%
canal10emporda	1,130	0.02%
canal21ebre	3,262	0.02%
vorientaltv	6,724	0.02%
pirineustv	3,158	0.02%
banyolestv	866	0.02%
canalreus	5,263	0.02%
rtvev	4,478	0.02%
btvcat	10,605	0.02%
tac12_tv	6,604	0.02%
canalblau	5,702	0.01%
vallesvisio	4,446	0.01%
tvemporda	3,377	0.01%
tvbergueda	2,297	0.01%
tv3cat	339,430	0.0%
molinstv00	298	0.0%
25televivisio	113	0.0%
tot_tv	466	0.0%
videoascotv	20	0.0%

Source: Personal compilation based on Fanpage Karma data.

Graph 3. Comparison between the user rate of interaction with corporate profiles on Facebook and Twitter

Source: Personal compilation based on Fanpage Karma data.

Graph 3 also confirms that there are significant differences between the communities of users of the same television channel, depending on the social network. The gap between Facebook and Twitter indices with TV channels such as VATV, Canal Camp, Mollerussa TV or Tàrrrega TV reaches 2 percentage points. There are also cases such as that of TV3 and 8tv, where the difference is below 0.5 points, so communities have a similar interaction on both networks. In any case, the graph confirms that the user communities of corporate profiles of Catalan TV channels are, in general, more active on Facebook than on Twitter, although there are some exceptions such as the cases of Televisió de Girona or Canal Taronja Central.

Conclusion and discussion

This study allowed us to diagnose social and mobile audiences of the Catalan TV system. It is, together with the studies made by OPA (in 2016) or Navarro et al. (2012), one of the first analyses of the relationship between the Catalan TV system, social TV and the profile and behaviour of users. For this reason, throughout this discussion we suggest starting points for further studies that could expand our results.

Data on the mobile environment show that a minority of TV broadcasters in Catalonia have their own corporate application, and those having one register fairly low levels of downloads. The cause could be related to a lack of strategies to develop more interactive products in the mobile environment, which results in the audience not finding a complementary and differentiated product in the apps (Galindo, Fernández and Alameda 2014). In any case, the ratings given by users to the apps are very good in general. This indicates that users are satisfied with the service offered by TV stations through their apps and that, consequently, having apps is beneficial for the media image.

We also observed how the profile of the audience downloading corporate mobile apps from TV channels and the profile of conventional TV audience differs significantly. In this regard, the potential implications related to the disparity of interests and needs of television viewers who access the content by each of this ways should be taken into account (Navarro et al. 2012), a matter that would be good for TV channels to consider. However, while this profile disparity can be used to find a possible explanation for the low adaptation of the TV channels analysed to the social television model, having an audience with a profile unlikely to download mobile apps or participate in social networks, we may assume that broadcasters are

not interested in making great efforts to develop such tools. However, it should be taken into account that commitment to innovation and adaptation to audience needs is profitable in the medium and long term, as it is also evident when looking at the good ratings received by those who have done so, as already explained above.

Data obtained from social audience analysis show low interactivity levels in both networks. This confirms that, regardless of the network, TV channels do not get a high commitment from the audience. In addition, the comparison of Facebook and Twitter communities opens the door to new questions about the subject of a greater interactivity in the first social network because, even though the characteristics of each network are essentially different in relation to their uses, this does not explain why, for the same TV channel profile, there is a difference of over 2 percentage points in the interactivity of its communities. In any case, a possible explanation for this widespread low interactivity could be related to the use that radios and TV channels make respectively, as studies by Sellas (2013) and Bonini and Sellas (2014) confirm. Thus, publications often have the primary objective of becoming an information reference framework for users, instead of being seen as an invitation to participate by commenting or sharing content. TV channels post content in their profiles without a strategy defined to generate interactivity and therefore communities are passive recipients of this production. On the other hand, the causes may be related to low on-line participation, a feature typical of Spanish and Catalan audiences versus other audiences such as those of the UK (Anstead and O'Loughlin 2011; Gómez-Domínguez et al. 2016).

With regards to more structural issues, we believe that beyond the TV broadcaster size, structure and budget, or the existence of specific innovation departments (Bonet et al. 2013), the Catalan TV system does not overcome interactivity barriers, which are also due to environmental factors. The social TV market in Spain is still in an early stage where broadcasters are assessing the risk of developing products for a traditional and apparently not very active audience (Franquet, Villa and Bergillos 2011). For this reason, we think that the role the CCMA, and specifically TV3, can play is essential when promoting a social TV market that becomes a reference for the whole Catalan TV system. Nonetheless, this does not mean that the role of local TV channels is not equally crucial. In this sense, new dissemination tools, cheaper mobile creation services and the fact that other services to manage and monitor social networks are free, are factors that can help them to avoid standing aside in a process of inevitable convergence.

This article also shows the need for new researches that expand on second screen apps and on social network profiles for the programmes, beyond the corporate profile. Even though the second-screen TV apps market in Catalonia and Spain shows little development, demographic data on their audience compared to corporate apps could help determine the suitability of further investment or production by the media in this market.

In terms of social networks, information on the levels of interactivity of communities related to specific programmes may offer a useful comparison that would enable the contemplation of the development of differentiated strategies for corporate profiles and for programme profiles. Finally, in future studies it would be interesting to consider a mixed methodological app that takes advantage of quantitative treatment with an analysis of opinions from community networks to obtain a comprehensive view of the digital communication environment of TV channels in Catalonia.

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Opera's audiovisual strategy on the internet: towards a search for new media audiences

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Abstract

Opera currently attracts global audiences by using audiovisual strategies on the internet. Theatres digitalise performances and broadcast these in audiovisual format to make it easier for audiences to access opera while these organisations, aware that young audiences mostly consume videos online, also develop audiovisual content whose aim is to modernise society's image of opera and bring it closer to the emotional worlds of such audiences. By studying the audiovisual content offered by 12 international opera houses, this article analyses the characteristics of such initiatives to explain the impact, as yet limited, they have on the artistic sector.

Keywords

Opera, art, communication, audiovisuals, digitalisation, audiences, internet, media, YouTube.

Resum

En l'actualitat, l'òpera vol atraure audiències globals per mitjà d'estratègies audiovisuals a la xarxa. D'una banda, els teatres digitalitzen el seu espectacle i el difonen en format audiovisual per facilitar l'accés dels públics a l'art. De l'altra, aquests organismes, conscients que els públics joves consumeixen majoritàriament vídeos a Internet, desenvolupen continguts audiovisuals que permeten actualitzar la imatge social de l'art i acostar-se als mons afectius de les audiències. Mitjançant l'estudi de l'oferta audiovisual de 12 teatres internacionals, l'article analitza les característiques d'aquestes iniciatives per explicar l'impacte, encara discret, que generen en el sector artístic.

Paraules clau

Òpera, art, comunicació, audiovisualització, digitalització, públics, xarxa, mitjans, internet, YouTube.

1. Introduction: a commitment to online audiovisual content

Today no-one can be in any doubt that the creation and appreciation of culture have been transformed by digital media (Igarza 2008, 34). As stated in the Anuario AC/E by Cultura Digital published in 2016,¹ digitalisation has brought about such significant changes in art and culture that these are affecting not only the creators of content and the media but are also essentially altering the uses and meaning given by audiences to these media (Tubella, Tabernero & Dwyer 2008, 20; Díaz 2009, 64; Celaya 2016, 8). Within this new context for cultural industries, produced by this fusion of media and the multiplicity of functions, the internet lies at the heart of daily communication with audiences (Press & Livingstone 2006, 184; Moura 2016, 25-35).

Some of the features of online communication, widely studied by the literature, are interactivity, immediacy, personalisation, enlargement, non-lineality and participation (León & García-Avilés 2000, 141-179).² All these characteristics are due to

new ways of appreciating information (non-linear, random and asynchronous) experienced by the generations of audiences born in the digital era. These users are able to recognise new narrative structures that do not require coherence between the different parts. According to authors, this digital generation also has a greater tolerance for audio and visual stimuli, great exposure to continuously changing images and is also familiar with saturated aesthetics, lighting and colours (Boiarsky 2002, 15-16). It therefore seems logical for audiovisual language, via its many different manifestations, to establish itself online as a means of expression that is capable of favouring this media-driven interpretation of cultural content by users (Díaz 2009, 64-71).

For many authors online video constitutes a substantial part of communicative interactions between cultural organisations and their audiences. Video has become a cultural form with its own rules, legitimised through its use by audiences: online it's the users themselves who freely confer such audiovisual messages with their own personal order and significance (Manovich 2001, 251-252; Cebrián 2008, 348). This promotes the fragmentation

of content to such an extent that communication is established through shorter snippets (Cebrián 2005, 65; Webster 2008, 23-38; Díaz 2009, 65). Consequently, although the internet provides access to extensive cultural content, the format whose consumption is growing the most is the audiovisual clip, especially among younger generations (Arias 2009, 64; Díaz 2009, 65).³ It's therefore natural that most artistic and cultural industries have started to create digital audiovisual strategies (Fumero & García Hervás 2008, 56-68). Notable examples of some of the global initiatives developed by cultural companies include the design of video games to encourage the consumption of art among young people and the use of new audiovisual technologies to promote international cultural festivals (such as Artfutura, devoted to digital art and creativity in the plastic arts, and the Subtravelling Festival and Tribeca Film Festival, both aimed at promoting "screened reality" and new technologies), among others (Roselló & Celaya 2016, 100-158; Sánchez Coterón 2016, 73-85).

1.1 Opera is making its content more audiovisual to attract online audiences

In the cultural sector, audiovisual digitalisation has affected both stage arts and opera (Bustamante 2011, 59-64; Lacasa & Villanueva 2011, 65-74). After having suffered the problem of attracting new generations of fans and with the express desire to set up a dialogue with younger audiences, in the 21st century opera has embarked on audiovisual communication strategies by means of digital media (Boiarsky 2003, 19-21; Ramírez-Soley 2011; Matabosch 2013). Such media favour opera because its spectacular nature, due to its eminently narrative base and audiovisual quality, can easily be digitalised and adapted to the new demands of video consumption (Citron 2000, 1-19; Radigales 2013, 160-170).

In 2016 international opera houses made an effort to improve their knowledge of their potential audiovisual audiences who are culturally active online but who, for various reasons, did not attend live shows at theatres, to determine what they could be offered from the point of view of medium usability (Boiarsky 2002, 17; Ramírez-Soley 2011, 1-13). In this quest, opera is aware that the possibilities of domestic integration offered by the internet for such a high-culture art are not merely limited to online audiovisual dissemination but can also help to stimulate, among such audiences, an additional desire to learn more about the musical genre (Silverstone, 1994, 3). These organisations are therefore exploring creative online strategies based on audiovisual language and format that help take the spectacle out of the theatres and bring it into the lives of people. Their aim is form part of the image society builds of itself and of its time (Hoffmann 2011, 273; Carroll, Foth & Adkins 2010, 147).

In general, there appear to be two audiovisual initiatives of a global nature which international opera houses have implemented to renew their audiences: 1) digitalising and audiovisualising the spectacle of opera to provide online access, and 2) building an informative network of audiovisual content

that helps to modernise opera's image, to educate and boost loyalty among new audiences. The main aim of this article is therefore to analyse in detail some of the features of such initiatives to determine whether opera is achieving its goal of dialogue with new audiences.

2. Methodology

Using a quantitative and qualitative methodology, an exploratory study has been carried out of the audiovisualisation strategies employed over the last few years by 12 of the leading international opera houses to promote opera, such as the Teatro Real in Madrid, the English National Opera, the Metropolitan Opera House in New York (the Met) and the Teatro Alla Scala in Milan. Specifically, an analysis has been carried out of the audiovisual content provided on the official websites and other online sites run by these theatres. This method has provided a systematic examination of the types, conventions and formal features of audiovisual texts. To complement this study, bibliographic sources have also been consulted of international standing, as well as monitoring recent news cuttings and the public actions carried out by these opera houses and other cultural organisations, such as *Opera Europa* and *Opera America*.

3. Audiovisual strategies to disseminate opera

The digital dissemination of opera content in domestic spaces is a strategy that has become well-established in the art industry thanks to the development of various online broadcasting services by theatres. This study has focused on discovering the precise channels used to disseminate opera on the internet, creating possible emerging markets, as can be seen in table 1 below.

After analysing the data, it can be concluded that, to take opera out of the theatre and decentralise its consumption, the growing trend employed by opera organisations has been to implement two different services depending on whether the original show can be seen live or recorded. On the one hand, online broadcasts via streaming have been set up in the international market, very discreetly, to disseminate premieres live. On the other hand recordings of operas can be watched by using a Video on Demand (VoD) service which, in one form or another, is being developed by the major opera organisations as part of their strategy for economic expansion (De Diego 2010). Below we present the main results from both initiatives.

3.1 Video on Demand (VoD) is boosting opera in audiovisual format

The most popular method used to disseminate opera digitally at an international level is video on demand or *a la carte*, especially in Anglo-Saxon countries, as can be seen in table

Table 1. Platforms for the online broadcasting and dissemination of performances

	Theatre by country (Link to the official website and Facebook)	Does the platform allow live broadcasts online with prior payment?	Online media library (whether part of the official website or not)?
1	Teatro Real (Madrid, Spain) Web Facebook	Yes. Palco Digital. https://www.palcodigital.com/	Yes. Via Palco Digital.
2	Gran Teatre del Liceu (Barcelona, Spain) Web Facebook	No.	No.
3	Opéra National de Paris (Paris, France) Web Facebook	No.	No, but there's a structured section entitled "Opera Video" with all the videos of the season listed by category, according to their format or the information they contain. This includes sections of "latest videos" and the option to enter keywords.
4	The Metropolitan Opera (New York, USA) Web Facebook	"Met Live in HD" has been developed but this is only a strategy for schools and cinemas globally, not for individual use as yet. Own radio service called <i>Sirius XM Satellite Radio</i> . Payment, monthly subscription. http://www.metopera.org/About/FAQ/FAQs/Live-in-HD-FAQ/	Yes. Pay service. Up to 2012 called <i>Metplayer</i> . Afterwards adapted to mobile devices such as iPad, becoming <i>Met Opera on Demand</i> . Monthly subscription. Offers videos in HD, Telecast and audio.
5	Teatro Alla Scala (Milan, Italy) Web Facebook	No.	No. It has a <i>Video Gallery</i> which only shows institutional videos of the opera house and the members of the choir and orchestra, but not productions of operas performed there.
6	Sydney Opera House (Sydney, Australia) Web Facebook	No.	It's not strictly a video library but it does have a page linked to the website entitled <i>Play</i> with all the performances recorded. This is its own video channel with access to content organised by artist, musical genre, type of show or theme, etc.
7	Wiener Staatsoper (Vienna, Austria) Web Facebook	No.	No. Neither does it have a surrogate <i>YouTube</i> channel. Only a brief fragment of video is provided on the official website, next to each title from the music season, as an example of the show.
8	Deutsche Oper Berlin (Berlin, Germany) Web Facebook	No.	No.
9	Royal Opera House (London, UK) Web Facebook	No.	No. There's a section called <i>Media Player</i> that takes you to <i>YouTube</i> . It can be shared.
10	Chicago Opera Theater (small season) Web Facebook	No.	No. It has a video section but this is imported from its own <i>YouTube</i> channel.
11	Teatro Colón (Buenos Aires, Argentina) Web Facebook	No.	No. Neither does it have its own <i>YouTube</i> channel although it does upload a lot of videos onto this generalist platform.
12	Bolshoi (Moscow, Russia) Web Facebook	No.	No. It redirects you to its own <i>YouTube</i> channel.

Font: author.

1. A download area provides consumers with tools to search, rate, personalise and distribute content (Díaz 2009, 65-66). Among the VoD strategies developed by opera houses, based on a content analysis, of particular note is the pioneering service called *Met Opera on Demand* by the New York opera house which, since 2012, has also included options for distribution via smartphone and tablet. *Met Opera on Demand* is considered to be a complex VoD service, based on prior payment, that combines an interactive media library⁴ with over 300 videos from the past (VHS quality), distributing the latest broadcasts from the *Met* in HD quality, as well as audio files.

Like *Met Opera on Demand*, VoD offers advantages to both opera fans and the institutions themselves. Of particular note among the main advantages extracted from the findings of the qualitative analysis is the ability of users to compare versions of the same opera (as a loyalty tool), the sound and image quality of the downloads (especially with pay services), the discovery of details which audiences attending the live performances missed, the great documentary value of this service for the theatres, since it acts as a large audiovisual database, and the chance to share some fragments on social media, thereby attracting new users (Wasserman 2009).

These characteristics mean that, in spite of the high cost of the service, it is logical that some theatres have made an effort to develop media libraries that can be consulted, such as those offered by the Sydney Opera House in Australia and the Opéra National in Paris.⁵ The analysis of the results has also observed how the general trend among opera houses, which are aware of how important it is for the decentralisation of art to be able to access content from home, has been to create alternative channels on generalist channels viewed extensively by internet users, such as *YouTube*, in order to make up for the lack of their own online media libraries. As can be seen in table 2, 100% of the sample in 2016 had their own *YouTube* channel compared with 77% of these theatres offering the service two years earlier. On these channels users can see shows from past seasons, either partially or in their entirety, although as there is no payment involved the quality of the image and sound is lower, as is the case of the channels created by the Royal Opera House in London, the Chicago Opera Theater in the United States and the Bolshoi in Moscow. All the evidence suggests that, in the future, most of these organisations will also end up creating their own video services as part of their image and corporate communication, as is the case of the *Met* and *Teatro Real*, since having specific platforms to consume art could help to improve the perceived online reputation of these institutions.

It can be concluded that, for opera, the future of the VoD service will depend partly on the conditioning factors of the internet itself in technological and environment terms. Although today many of these theatres offer the chance to appreciate an entire opera on a smartphone or tablet, with high quality, cultural agents wonder whether audiences will be willing to use mobile devices to access long-duration content (Díaz 2009, 65; Ramírez 2011).⁶ An analysis of the results therefore sug-

gests that, unlike the rapid development seen in entertainment towards mobile screens, due to opera's narrative and musical length the dissemination of such audiovisuals is dependent on devices designed for high quality appreciation in environment terms, such as home computers or digital televisions.

3.2 Audiovisualising live opera through streamed broadcasts

Regarding the strategy to distribute live shows, as can be seen in table 1 streamed opera is still in its infancy as a project and strongly influenced by economic and technological factors. Just 16.6% of the sample of theatres (2 out of the 12 analysed) offer online streaming of opera: the New York *Met* (via its school project) and the *Teatro Real* in Madrid (via its *Palco Digital* platform). To be able to provide this service, to date it has been those international organisations financed by many different investors that have led this kind of initiative since its beginnings in 2008, such as the Bayreuth Festival and the Glyndebourne Festival.⁷

In spite of the technological conditioning factors, this research concludes that, from an artistic perspective, streaming is considered to be the ideal formula to modernise opera naturally as it maintains the artistic drive of the art: it conveys the experiential dimension of the live event, making viewers co-participants in the real-time experience (Heye, 2008). After analysing the content, one example that warrants particular attention is the Spanish case of the *Palco Digital*, a project set up in 2011 by the *Teatro Real* in Madrid, as well as the *Orbyt* platform via its *ONO* pay channel. The *Palco Digital* is an audiovisual channel which, via the internet, offers live productions from the opera house in high definition audio and video. Although, at present, this service also provides a facility to download historical files of Madrid productions, the initiative is focused, by means of an annual subscription for a package of paid content, on users being able to see premieres via their laptop in real time as in the theatre production (Lorenci 2011).⁸ In 2011 this Spanish initiative needed to invest more than four million euros in the technological infrastructure required to give the theatre full autonomy and allow it to record, broadcast and produce in high quality, surpassing the quality of the facilities at Covent Garden in London and the *Met* in New York.

As in the case of the *Palco Digital*, given the large financial investment required by theatres to carry out live-broadcast initiatives, it seems that the future of these services will depend on the emergence of third parties capable of taking shows to the end consumer, such as technological firms or broadcasting channels, for example *Medici.tv*, *ClassicalTV*, providers such as the Spanish firm *I2CAT*, *GARR*, or virtual platforms such as *Terena* in the Netherlands.

Although VoD and streamed content have already been set up on the internet, having analysed the data given in table 1 it can be observed that opera is actually only using this online dissemination strategy to a limited extent. According

Table 2. Audiovisualised online information of opera house websites in 2015

	Theatre by country	YouTube (when started and link)	Is a video of each opera from the season included? Can it be shared?	Specific multimedia services offered	Development of their own audiovisual consumption services for mobile devices	Another type of audiovisual promotional information used? If so, which, how and in what format?
1	Teatro Real (Madrid, Spain)	Yes, double. One for the theatre and one for the <i>Palco Digital</i> . 2010 and 2011. YouTube	Yes but not directly. You have to click on the "audiovisual material" window to see them.	Palco Digital.	<i>Palco Digital</i> adapted for <i>iPhone</i> , <i>iPad</i> . Pay service	The home page does include some video.
2	Gran Teatre del Liceu (Barcelona, Spain)	Yes. 2008. YouTube	Most operas are included. Most can also be shared and are fragments from the theatre's previous productions of the same opera. If not, there's a gallery of photos.	Contains videos from the television programme "Opera en Texans" and its international version "This is Opera" as part of the popular information on its programming.	No. Tickets can be bought via <i>iPhone</i> but through ServiCaixa. Since 2011.	No videos included on the Home page. Short videos in the intros of "Opera en Texans" and video conferences with the presenter. Serial with small fragments entitled "la webcam de Ramon Gener" on the titles of the operas. The season is announced on <i>YouTube</i> .
3	Opéra National de Paris (Paris, France)	Yes, since the end of 2015. YouTube	Yes. Fragments are included from the productions, statements from directors... Videos can be easily shared.	A video-pdf of the whole season can be downloaded in a separate window to be able to see all the information as a "video-format catalogue". Very few offer this option.	Free <i>iPhone</i> app. The information is adapted from the website for the mobile device. Videos and information can very easily be shared.	The aforementioned audiovisual PDF video. The Home page doesn't have any videos.
4	The Metropolitan Opera (New York, USA)	Yes, although substituted by its "Metplayer" platform. YouTube	Yes. Not only video but a lot of trailers, opera fragments, interviews, 'making of' documentaries, etc.	<i>Met Live HD</i> , <i>Met Opera on Demand</i> , <i>Sirius XM</i> (radio), <i>Saturday Matinee Broadcast</i> (radio)	The Met Opera for <i>iPhone</i> , <i>iPad</i> ; free of charge. The old media library <i>Metplayer</i> is now called <i>Met Opera on Demand</i> (pay service, adapted for <i>iPad</i>).	No videos on the Home page. Videos can be easily shared and have a specific section that refers you to the purchase of tickets at the online box office.
5	Teatro Alla Scala (Milan, Italy)	Yes, since 2007. Videos are arranged by show category. YouTube	Not on all of them - you have to click on a separate page.	None. There's an archive, a kind of news section but you have to subscribe and ask for information.	No.	No.
6	Sydney Opera House (Sydney, Australia)	Yes, since 2006. YouTube	No	<i>YouTube Symphony Orchestra 2011</i> . A whole project affiliated with the theatre to create online symphonic music.	Yes, free adaptation of the website information for <i>iPhone</i> and <i>iPad</i> . Curiously, with the app you can listen to podcasts but not on the website, these having been overwhelmed by the video material.	Yes. Interviews with singers and directors that can be downloaded from the website itself.

Source: author.

Table 2. Audiovisualised online information of opera house websites in 2015 (continuation)

	Theatre by country	YouTube (when started and link)	Is a video of each opera from the season included? Can it be shared?	Specific multimedia services offered	Development of their own audiovisual consumption services for mobile devices	Another type of audiovisual promotional information used? If so, which, how and in what format?
7	Wiener Staatsoper (Vienna, Austria)	Yes, since 2015. YouTube	Yes.	No.	No.	No.
8	Deutsche Oper Berlin (Berlin, Germany)	Yes, since 2014. YouTube	Since 2013, yes. Can be shared.	Own section selling its own CDs-DVDs	No.	Videos inserted into the page itself.
9	Royal Opera House (London UK)	Yes, since 2007. YouTube	Yes but not clips from the operas but related information. Includes general videos on the 'making of', statements from producers and artists in general, as well as trailers.	Yes, specific "Backstage" section with videos also linked to <i>iTunes</i> .	1) Device for <i>iPhone</i> but the operas can't be seen on a mobile. Only to buy tickets and see trailers. 2) In 2011 a game was launched for <i>iPhone</i> and <i>iPad</i> called "The Show must Go On" (69 pence)	Use of "Extras" in the "Discover" section, always next to the written information. No videos on the Home page.
10	Chicago Opera Theater (small season, Chicago, USA)	Yes, since 2007. YouTube	Yes. Not a teaser or a clip but a 'making of' or extras, or promotional video.	No.	No. It's only developed corporate pro-opera cases for mobile devices (merchandising).	No.
11	Teatro Colón (Buenos Aires, Argentina)	Yes, since 2015. YouTube	No.	No. Curiously, apart from tickets you can also buy food for the event.	No.	No.
12	Bolshoi (Moscow, Russia)	Yes, since 2005. YouTube	No.	No.	No.	No.

Source: author.

to the findings of this research, the success of such initiatives could be limited by unfavourable environments for viewing an original show online (given that operas last a long time), by technological and economic difficulties and also by a continuing minority interest in opera. Opera must realise that, for such a sophisticated art, the creation of new digital markets requires a boost from a whole network of information that helps audiences to feel a desire to appreciate it.

4. Strategies to communicate opera in an audiovisual format

As opera is an art that requires a certain amount of previous learning, the natural exchange of knowledge, relations and desires that occurs on the internet means that this medium is very useful for creating a benchmark operatic context for new cultural audiences. Opera also seems to realise that digital audiences are much more oriented towards an audiovisual and media-based appreciation of content that previous generations of audiences (Pereira Domínguez & Urpí Guercia 2005, 78). Consequently, the efforts made by organisations are not solely aimed at distributing their digitalised product but also at the progressive audiovisualisation of this informative world related to opera, so necessary to stimulate aesthetic emotions and true personal involvement with art (Rössel 2011, 89). According to the evidence found by this research, there are many different audiovisual communication proposals today on the internet. Due to their proliferation and constant change, it's difficult to cover them in any detail in this article. This section will therefore focus exclusively on an analysis of the main audiovisual formats and content included by opera houses in their online communication strategies in order to adapt the information they produce on their art to how viewers use digital media.

As can be seen in table 2, in the last 6 years the presence of videos on opera on the official websites of opera houses has gradually increased thanks to the models started by theatres such as the Metropolitan Opera House in New York (Lacasa & Villanueva 2012, 413-418). These findings also reveal that those theatres that are most committed to this audiovisual initiative are fundamentally Anglo-Saxon: London, New York, Chicago and Australia. In Europe, Spain can also be considered as a pioneering country in the use of audiovisual content as a strategy to communicate with audiences. Below is a summary of some of the most relevant findings from the analysis of the content.

4.1 Slow audiovisual adaptation of official websites

As can be seen in the third and fourth columns of table 2, on theatres' official websites (and in general in all the information managed by the opera industry online for users), video has been incorporated as the main format capable of offering the most important information regarding annual seasons of music.

Although, judging by our research, opera's strategy is

appropriate, the adaptation of website information to audiovisual language has taken place somewhat slowly in comparison with other artistic sectors. This phenomenon is because opera has come up against a generational problem that is now online: in order to meet the information needs of its traditional opera fans, who are not very used to multiple, integrated texts or hypertext (Jukes 2008, 13-15)⁹, until very recently the communication on theatres' official websites had remained faithful to designs and conventions more befitting a written environment and parameters of analogue and textual information (as if it were a book), which are not very compatible with the audiovisual nature of opera itself or of videos. In our findings it is notable that, up to 2012, some of the world's leading theatres such as the Teatro Colón in Buenos Aires (whose website was updated throughout 2013) still used analogue-type aesthetics that were not very user-friendly and a predominance of lineal text (Díaz 2009, 70). Although this situation seems to be changing gradually, opera houses are refusing to entirely give up the type of communication their websites have traditionally used to respond to audiences most loyal to art: at present these people are still, ultimately, the ones who go to see live opera, who pay for expensive tickets and sustain the economic motor of opera (Ramírez-Soley 2011).

After our analysis we can state that, in 2016, these sites still do not exploit the aesthetic, educational or commercial potential of inserting videos of opera online, especially to achieve a dialogue with new virtual audiences. They are therefore missing the chance to adapt their media because, as we have seen, online videos are essential in order to encourage an integrated discourse brought about by audiovisualisation, and to provide an up-to-date image of art (Díaz 2009, 70; Moura 2016, 25-35).

4.2 Absence of audiovisual content specifically for mobile devices

Another of the findings of this research is related to the development of mobile apps. Not content with audiovisualising their institutional content, opera houses have also embarked on offering audiovisual opera on these devices, as can be seen in the fifth column of table 2. However, after a more detailed analysis of the apps created by the Teatro Real, Opéra National de Paris, Met and Sydney Opera House for tablets and telephones such as the *iPad* and *iPhone*, it can be seen that, at present, these seem to be replicas of their websites: they're designed to act as mere disseminators of the services offered by the official websites. Only some of them have started to include small informative videos via *narrowcasting* or *multicasting* systems in order to promote products, reinforce the theatre's corporate image, educate about a specific opera or create public opinion, among others (Díaz, 2009, p. 67). It has been shown that, although these initiatives are small and anecdotal, such short videos can help keep information up-to-date and encourage greater interaction between parties when used for cultural purposes.¹⁰

The number of artistic apps for mobile devices on the

international cultural network is increasing daily thanks to the appearance of specialised initiatives such as *iphoneArt*, *Jodi.org*, *Snapseed*, *Instagram*, *Streetmuseum* and *Snibbe*, among others. However, in the area of opera, the development of services and content specifically for mobile devices is still almost inexistent. As an exception we can cite the first opera game for *iPhone* patented in 2012 by an official organisation, the Royal Opera House in London, called *The Show Must Go On*.

As is already happening in other cultural industries, opera could explore the development of interactive apps, created by artists themselves which, rather than being a mere adaptation of the website to mobile screens, take advantage of new ways to interact with art such as playing with technology itself, with audiences taking part in performances and also music education (Sánchez Coterón 2016, 73-85).

4.3 Increase in audiovisual marketing as a promotional tool

Another of the most notable findings of this research is the considerable increase in audiovisual clips for promotional purposes on websites, mobile devices and digital opera platforms. Increasingly influenced by online marketing strategies, or by the commercial models adopted by sectors such as cinema, television and advertising, the opera industry is attempting to renew its image, imitating those successful audiovisual formats (short in duration, aesthetically visual and easily shared) that are capable of encouraging greater consumption on the internet (Muro 2006, 155; Colbert & Cuadrado 2003; McLean 1994; Scheff & Kotler 1996). Below are some of the most representative examples of this digital communication.

Inspired by the film industry, opera houses have started to create cinematographic trailers for their seasons of music as well as the use of online "extras", such as 'making of' documentaries for shows, biographies of the singers and composers, interviews and statements by the artistic team (De Diego 2010, 1-2; Sheil 2012). With these "extras" consumers learn the value of art, that opera is much more complex and enriching than they may have realised based on just the music alone, helping to contextualise the meaning of an opera within a contemporary framework. Online advertising and marketing have also been included in the latest strategies to attract audiences, such as the creation of low-cost lipdubs and flashmobs, podcasts to promote the operas being shown, viral messages and costly spots for theatres' seasons of music.¹¹

This sudden audiovisualisation of content *about* opera, however, does open the door to a certain underlying consideration. The proliferation of technologically and aesthetically sophisticated videos helps to offer a much more permeable image of art because it is more commercial and up-to-date, but it also results in the tendency to *spectacularise* the performance itself, forgetting that, in doing so, this may negatively affect the conception of opera that theatres are hoping new audiences will have (Muro 2006, 155; Heyer 2008, 596).

4.4 The success of opera clips thanks to viewings on YouTube

Finally, we should also note that audiovisual clips seem to have found a common shared space: the generalist platform *YouTube* (Strangelove 2010, 10).¹² As can be seen in table 2 almost all opera houses have developed their own channels where opera and institutional content exists side by side with a host of audiovisual clips, of an amateur or fun nature, whose function is to promote opera as an important, current world (Lacasa & Villanueva 2011, 65-74). Although such clips are framed within the context of theatres and art, on *YouTube* they become more a source of fun as they are seen separated from their institutional reference and on a familiar platform for users that helps turn them into elements of infotainment (Díaz 2009, 68). Theatres will probably encourage this type of audiovisual content on opera more eagerly once they've realised that younger audiences construct part of their personal identities through such audiovisual expressions (Fumero & García Hervás 2008, 56- 68; Thussu 2008, 161).

Another of the characteristics *YouTube* seems to have is the capacity to attract a large number of fans around the statements and lives of celebrities (Strangelove 2010, 15). Consequently, today it's not strange to find videos of world-famous singers such as Roberto Alagna or Anna Netrebko offering exclusive interviews on this platform for international audiences. By exposing their private lives, opera singers hope to attract the attention of mass audiences and thereby the support of advertising to boost their global reputation even further (Bourne 2009, 283).

As reflected by the findings, it can be concluded that, thanks to services such as *YouTube*, today audiovisual clips are one of the few tools capable of giving an online voice both to the producers and also to the professionals and audiences of opera. Although not considered as *pure opera*, these audiovisual micro-discourses are very important in the media-based process of opera as, from a user's point of view, they represent new ways of organising popular emotions that are linked not to any direct experience but to the technical intervention of the media (Gordillo 2008, 9-10). Moreover, in the same way that opera celebrities attract crowds of followers via this platform, opera organisations could themselves create initiatives on their own *YouTube* channels to encourage an appreciation of the art, in snippets, which can simultaneously set up a dialogue and also educate thanks to the continual comments linked to such videos.

5. Conclusions

In the new cultural context caused by digitalisation, opera is attempting to attract and educate audiences via the internet and provide an image of a familiar, up-to-date art. In turn, online media want content that's not only capable of stimulating the interest of users but also of raising their cultural level. The

internet allows both sectors to create synergies that ultimately add value to the life of society. As has been seen in the findings of the analysis, opera today is aware of this opportunity and, in general terms, has made the right move in incorporating audiovisual initiatives in its move to become more approachable to society. More than with any other art, such strategies are possible thanks to opera's audiovisual nature; they help make opera more accessible, personalised and social.

However, as shown by this study, the continuing minority interest in opera's audiovisual products reminds the art that, from a user's point of view, today's problem is not one of technology or even distribution; in a media-based society opera must be able to create a better correlation between the audiovisual messages it transmits and the expectations of its audiences. In the future opera should explore initiatives that provide it with greater insight regarding the desires, habits and tastes that are already being displayed on the internet by new music audiences. After what we've seen in this study, it can be said that, to become up-to-date and legitimised by such audiences, it's not enough for opera to use audiovisual clips that are aesthetically close to their affective worlds. With such initiatives opera can only achieve the first step of attracting the attention of its potential audiences but it cannot hold a dialogue with them and therefore educate them culturally.

As has already been observed with the *YouTube* phenomenon, digital audiences will increasingly propose audiovisual stimuli that should not only be accepted by cultural industries but also promoted and encouraged. Strategies such as the interactive use of videos on these platforms, the creation of content specifically for mobiles with wholly audiovisual characteristics, the integration of hypertext language on the internet, as well as encouraging participation and online education related to this content will help to increase the demand for artistic content, thereby raising the cultural level of users at the same time as helping to boost the loyalty of new virtual communities given their growing video consumption.

Notes

1. It's highly recommended to consult the *Anuario AC/E de Cultura Digital* for 2016, which focuses particularly on the impact of new digital technologies on different cultural sectors such as museums, stage arts and dance (Celaya 2016). Specifically, in order to illustrate the scope and interest of the article if extrapolated to other cultural spheres in addition to opera, we recommend reading contributions made to this area of study by María Moura Santos —El impacto de internet en la creación cultural—, Paul Waelder —El mercado del arte en la era del acceso—, and Pepe Zapata —Transformación de las Artes Escénicas en la era digital—. This annual of international findings is published each year by the association *Acción Cultural Española*.
2. Regarding immediacy, users are more able to access content when they want and when it's convenient, in what has been called an "instant information culture" (Harper 1999, 57). Personalisation allows users to decentralise the consumption of content because access to information is easier. Enlargement is understood in the sense of access to a larger amount of information as users' wish (Igarza 2008, 169-171).
3. In 2016 there are a lot of products that are merely fragments of more extensive audiovisual narratives, often manipulated and post-produced by their creators or by the users themselves (Díaz 2009, 65; Lacasa & Villanueva 2011, 65- 74).
4. One of the big advantages of the platform is precisely its interactive nature since users can easily browse the work, divide up and share the lineal view to directly reach the desired content, make lists of favourites or choose the quality of the video played.
5. Strictly speaking, these theatres do not provide virtual media libraries linked to their official websites from which operas can be downloaded but redirect users to pay platforms created to download and view content.
6. It's still believed that, today, online devices do not provide a suitable environment (understood in terms of image and sound quality) to appreciate the art of opera under the best circumstances: in short, being able to see a complete, long-duration opera.
7. In 2008 the Bayreuth Festival was a pioneer in launching this new way of attracting new audiences to the event via live content through its website. It thereby managed to make the most of a festival that lasts just two months a year, raising its international profile and turning opera into a newsworthy event. The project was repeated in successive years with other titles (such as *Die Walküre*, by Richard Wagner, in August 2010). Its success has also been imitated by other organisations such as The Glyndebourne Festival.
8. In a similar way to the initiative by the Metropolitan Opera House in New York, the *Palco Digital* offers its subscribers different pay services: users can watch, from home via the internet, exclusive audiovisual content to which they have unlimited access for the time their subscription lasts (six months or a year). They can also buy tickets for live broadcasts. Fundamentally the *Palco Digital* allows users to enjoy live broadcasts produced in high definition and with high quality digital sound via live streaming from the opera house. The application of latest generation technology also means the signal can be transmitted via satellite or produced on Blu-Ray or DVD. The *Videoteca* of the *Palco Digital* also has, on demand, works recorded in high definition at the Teatro Real, as well as extra content to find out more about the operas. According to the official website itself, the *Videoteca* will continue to add titles to extend its collection of documents and make this available to the public. See its official website: <<http://www.palcodigital.com>>. Last consulted on 23 September 2015.

9. Traditionally audiences that are not digital natives, more closely connected with the art of opera than with media content, are those who have principally gone to the internet to consume opera information. In fact these opera fans usually coincide mostly with the category of non-media based audiences, less used to multiple and integrated forms of interpretation (Jukes 2008, 13-15).
10. We note, as an example, the company Jodi.org, known for creating an app called "zyx" to develop a performance work in which users can actively participate. The app shows a choreography to follow with the recording of everyday movements and the frustrated interactions users make when using a mobile. One of a number of artistic reflections on the behaviour produced in using mobile technology by way of performance art, this was carried out at the New Museum of New York last year. See: <<https://blogmobileart.com/2012/09/20/apps-moviles-en-el-contexto-artistico/>>
11. As an example, see the spot promoting the last 2015-2016 season for the Gran Teatre del Liceu in Barcelona.
12. *YouTube.com* is the most standardised website in the world for sharing videos online. Its fame increased in 2006 when Google acquired its shares. At that time users of the generalist platform uploaded an average of 80,000 new videos per day (Tan & Jarvis 2006) and, by 2010, the number of views per day was in excess of 150 million (Strangelove 2010, 10).

End note

This paper provides some results of the research entitled *La mediatización audiovisual de la ópera como proceso de apertura a nuevos públicos en el siglo XXI*, which received the First Prize of the XXVII CAC Awards to Research into Audiovisual Communication.

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Developments in the legal framework of Radiotelevisió Valenciana. Future prospects

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Abstract

In the article we take a look at the history of the legislation regarding RTVV. We review the laws that governed this regional audiovisual service and examine whether they were complied with or not. The legal framework forms the operational basis of a Public Broadcasting Service that now is muted. The abrupt shutdown of this regional broadcaster has left behind a muddled situation that first needs to be sorted out. Lawmakers now face the task of relaunching this public service, as well as ensuring there is enough responsibility to avoid repeating former mistakes.

Keywords

Broadcasting regulation, regional television, public service television, public service media, RTVV.

Resum

En l'article fem un recorregut per la història jurídica de RTVV. Repassarem les lleis que regiren aquest servei audiovisual autonòmic i si s'han complert o no. L'entramat legal és la base del funcionament d'un mitjà de comunicació públic ara emmudit. El tancament abrupte de la radiotelevisió autonòmica deixa com a herència un embolic que cal aclarir en primer lloc. Els legisladors tenen ara al davant la tasca de tornar a posar en marxa el servei públic, i, a més, de fer-ho amb la responsabilitat suficient perquè els vells errors no es tornen a cometre.

Paraules clau

Regulació audiovisual, televisió autonòmica, televisió pública, mitjans de comunicació públics, RTVV.

1. Introduction, aims and methodology

The singular nature of Radiotelevisió Valenciana (RTVV) as the only regional broadcaster, closed down as a result of the crisis, has become the centre of attention as an example and paradigm of the future awaiting public service media, mistrusted by citizens due to its relatively inability to provide a public service, its rather unhealthy balance sheets and inflated workforce. This media crisis, which is in addition to the general situation of the economy, is not limited to just our country but is repeated throughout Europe: "Attacks on PSM [Public Service Media] have been fuelled by legitimate concerns caused by economic turmoil within media industries following sharp declines in advertising revenue and consumer spending" (Lowe & Steemers 2012: 4). Recent political changes and the explicit desire of the new people in power to reopen this regional broadcaster but without making the same mistakes means that it has become particularly relevant to study the situation to date. A study of the different laws, and the failure to comply with them, which have governed Valencia's media (actually not very different from the situation for the state of Spain as a whole) is especially relevant now that the future of the media in Valencia requires a new route map to be drawn up and set out by legal regulations.

The government of the autonomous community of Valencia, the Generalitat, has pledged, set down in law, that new legislation by the summer of 2016 will establish the basis for the new RTVV. It is therefore time, we believe, to know where we have come from in order to determine where we want to go. The methodology we use is a historical and organisational analysis of the legal system that governs broadcasting and brings to light its non-compliance. A comparison and the evolution of this legal framework and of its underlying social and political circumstances will help us to better evaluate the predictions for the future in this area, especially given the *tabula rasa* for broadcasting that can be found in the Community of Valencia.

2. The legal framework in the Community of Valencia. The Audiovisual Act and the statutory order to create the Audiovisual Council of the Community of Valencia (Consell Audiovisual de la Comunitat Valenciana)

The state of Spain gives broad powers to the autonomous communities in the area of broadcasting and the Community of Valencia has gradually developed its own legislation, without ever being the first to do so (a right that seems reserved for historical

communities, especially Catalonia and the Basque Country) and with the tendency to imitate laws shared with the rest of the autonomous communities. In terms of the reference law currently in force, in the Community of Valencia this is Act 1/2006, of 19 April, by the Generalitat, on the Audiovisual Sector,¹ which has been classified by Professor Josep Gavalda as a humiliation “in the light of what has been carried out by the PPCV [Partido Popular party in the Community of Valencia] in RTVV over eleven years” (2014: 373). The preamble to the Audiovisual Act of the Community of Valencia states that audiovisual media, as well as their additional services, constitute fundamental pillars for the development of today’s society as they help to reinforce the economic and social cohesion of the territory and allow the emergence of new types of productive activity and the creation of jobs, as well as setting up mechanisms to provide citizens with access to an audiovisual sector that fosters an increase and improvement in their capacities and possibilities for information and communication.

This is a declaration of principles that provides comprehensive regulation of the audiovisual sector in the Community of Valencia. Title V covers the digital television sector and establishes the powers of the Audiovisual Council to hold tenders and award the corresponding licences. This law, however, is now obsolete, especially because it precedes the General Audiovisual Communication Act² of 2010 (LGCA).

The Valencian Act establishes the creation of the Audiovisual Council of the Community of Valencia although this was also included in the reform of the Statute of Autonomy. There are no references, however, to radio, film or advertising (Vidal Beltrán 2011: 203-204). The inclusion of the creation of the Audiovisual Council of the Community of Valencia in the Statute is notable. Both laws, Act 1/2006 of the Generalitat, on the Audiovisual Sector, and the Statute, passed as Organic Act 1/2006, of 10 April,³ were drawn up at the same time and this may be why both texts refer to the Audiovisual Council. Finally the Statute established (article 56.3) that:

“By Act of Parliament, approved by a majority of three fifths, the Audiovisual Council of the Community of Valencia shall be created, which shall safeguard respect for constitutional and statutory rights, freedoms and values in the area of communication and audiovisual media in the Community of Valencia. Regarding its composition, appointment, functions and statute of its members, this shall also be according to that provided for by the Act.”

And the preamble to the Audiovisual Act states that:

“[...] by the proclamation of a specific law, the Audiovisual Council of the Community of Valencia shall be created as an independent body that shall be governed by this Act, by the law that creates it and by other applicable provisions. The law creating the Audiovisual Council of the Community of Valencia shall establish its composition, functions and

powers which, together with those stated by this Act, shall be implemented for the better functioning of the audiovisual sector of the Community of Valencia. [...]”

Nine years have passed since the governing party (the Partido Popular or PP) included these guarantees even, as we have seen, in the Statute of Autonomy. However, the Generalitat never set up this regulatory body. This comes as no surprise. In fact, such apathy coincides with that shown by the Spanish government and other communities and is in line with the PP’s overall policy for audiovisuals. The framework law also provided for an audiovisual consortium for the Community of Valencia, in chapter III, and in IV a general register of audiovisual companies. Neither of these bodies was set up. There is obviously a clear difference between what is stated in laws and what is actually carried out.

“The Audiovisual Council should become a genuine independent authority for all kinds of operators and licence holders, either publicly and/or privately owned, and with regulatory and disciplinary powers over the content of the sector, including formats and forms of transmission. [...] But, from our point of view, this is not merely a question of ensuring a certain law is complied with or of controlling operators broadcasting in our territory but attending to the priorities resulting from the public interest and a responsibility towards citizens.” (Mollà i Orts 2007: 470-471)

3. A little history: the Act creating RTVV

In line with the situation in the rest of Spain, the start up of Canal 9 RTVV was carried out in the same way as the then recent Statute for Radio and Television and Act 4/1980⁴ and, of course, complying with the guidelines of the Act for the third channel 46/1983.⁵ Just one year later, Act 7/1984,⁶ of 4 July, was also passed, creating the public entity of Radiotelevisió Valenciana (RTVV). Regarding the RTVV Statute, some particular features were introduced. For example, when the founding principles are listed, priority is given to “the promotion and linguistic protection of the language of the Community of Valencia” — article 2.1.a—). It should be noted here that the Advisory Council, provided for in the RTVV Act, as it is for the rest of the autonomous television broadcasters as well, with functions similar to the Advisory Council of Radio Televisión Española (RTVE), was never actually set up in the 28 years this Act was in force. It also had a slightly new aspect insofar as the Board of Directors was responsible for proposing, to the Council of the Generalitat, the appointment and withdrawal of the Director General (article 7.1.a): “In this point it is stated that the Board of Directors is responsible for proposing to the Council of the Generalitat Valenciana the appointment and withdrawal of the Director General” (Linde Paniagua, Vidal Beltrán & Medina González 2013), which we interpret as a person being

put forward who is then corroborated by the Council of the Generalitat with their appointment.⁷ The problem lay in the fact that members of the Board of Directors were approved in the Valencian parliament by simple majority and this resulted in what Enrique Linde has called the “parliamentarisation” of the Council; i.e. they became an accurate reflection of the order of the political forces represented in the parliament.

The Act to create RTVV was in force for 28 years albeit with some important legislative modifications, such as the one carried out by the government of Eduardo Zaplana via Act 9/1999,⁸ which allowed RTVV, from that moment on, to enter into debt, a power which, from then on, was exercised indiscriminately by the successive Director Generals. This change played a crucial part in the financial downfall of Canal 9 that lasted for years, due to a continual lack of concern shown by those in charge (López-Olano 2015: 141).

4. The reform of the RTVV Act promoted by the PP. The relationship with the Spanish regulatory framework

Act 3/2012, of 20 July, of the Generalitat, on the RTVV Statute, ⁹ annulling Act 7/1984 and creating the RTVV, was approved while conversations were underway regarding the redundancy plan with RTVV's Workers' Committee. In line with state laws and with European obligations, this distinguishes between broadcasting activities that are public service and those that are not, and also opens the door to privatisation, whose nature is dictated by the programme contract. It establishes a mixed funding system based on advertising and public subsidies, as before, but with separate accounts for the twofold activity. The Act permits the outsourcing of production and editing of content, as well as the provision of material, technical and human resources, including for activities considered to be a public service. In this case “outsource” evidently means “privatise”. Article 24.3 authorises third parties to produce and edit news programmes. Article 5 considers Valencian to be the preferred language for providing public services, leaving the door open to broadcast in Spanish as had been customary in the 24 years of RTVV broadcasts. 20% of broadcasts were reserved for local audiovisual and cinematographic work to promote local industry and independent producers. It should be remembered that the new RTVV Statute was passed after the reform of article 40.2 of the LGCA, amended by Act 6/2012,¹⁰ to make the management of autonomous audiovisual communication public services more flexible, which explicitly allowed or “clarified” (Boix Palop 2013) the outsourcing of news services. This situation is maintained, with outsourcing also being permitted in the autonomous Act, and undoubtedly there could have been repercussions in a hypothetical future. Not in the immediate future, as we will see in the next section, as the inferior regulation does protect news programmes from privatisation. But article 3 of the new RTVV Statute, entitled “Public service management”, literally states:

“1. Public service management for radio and television by the Generalitat shall be carried out through Radiotelevisió Valenciana, SA under the terms contained in this Act.

2. That established in the previous point does not exclude the possibility of Radiotelevisió Valenciana, SA outsourcing the production and editing of content, as well as the provision of material, technical and human resources required to provide the service, in all cases respecting the limits established to this end in basic state legislation.”

A new company was also created, a single shareholder public limited company, RTVV SAU, and any debts pending payment were left to the old company. This was an identical operation to the one carried out in 2006 for RTVE with the new corporation and the old entity. Section III of the preamble clearly prevents the massive debt which the different managers had entered into as from 1999 in RTVV and which left the network technically bankrupt. The aim was for the new radio and television company to be born free from debt as the old RTVV assumed the debt that had been generated in the previous years, and the new company also had a smaller workforce since the redundancy plan would be implemented before it was created. Such an important law was processed by parliament urgently in just one day. Not a single amendment from the opposition was accepted and it was passed solely with the votes of the Partido Popular. José María Vidal Beltrán states that:

“This is the only Act throughout the history of the Valencian parliament for which all the opposition groups, given their disagreement with the new model of the RTVV proposed and the obstinate approach to negotiation of the Council, proposed a joint alternative text. [...] An alternative text which essentially proposed radio and television in the Valencian language, under similar terms to the aforementioned Galician Act and with more controls to guarantee it would function democratically.” (2014a: 397-398)

In other words, unlike the agreement for the Act to create RTVV in 1984, this new Act was created full of contradictions and lacked agreement. Nevertheless, in line with the regulatory spirit of increasing guarantees of independence incorporated in the new laws appearing during the first legislature of [the Socialist President] Rodríguez Zapatero, Act 3/2012 of the Generalitat provided some positive protection: the new Director General would have, for example, a mandate longer than the four years of legislature: the appointment would be for six years and the same person could renew their position twice. The Board of Directors was made up of nine members including the Director General, who were assumed to be qualified, as established by article 12. A three fifths majority was required in the first vote to elect members. A similar procedure was applied to elect the Director General. This was adequate protection which forced consensus and was in line with Act 17/2006, which initially proposed a method of appointment with similar guarantees. But

under the PP government of the Community of Valencia the only possibility was to continue what had been carried out by the PP in the Spanish government. Three months after Royal Decree Law 15/2012 amended Act 17/2006, permitting a second vote just 24 hours after the first in which only an absolute majority was required for appointments, the Valencian Act introduced the same alternative measure to consensus, as was also the case in a large number of regional laws in Spain (Catalonia, Andalusia, Balearic Islands and Asturias).

The articles of this Act required guarantees, such as the condition that RTVV, SA must be extremely accurate in terms of true facts, that these must be sufficiently checked using a range of sources and constantly updated, and that the programming of RTVV, SA must provide space for all options and opinions existing in Valencian society for a correct evaluation and interpretation of the facts by citizens. These are guarantees which, as experience has shown us, are very difficult to check afterwards in terms of their compliance but which, on the other hand, are customary in laws.

5. The new RTVV: the new framework mandate, the programme contract

Article 4 of Act 3/2012 establishes that the Valencian parliament will approve a framework mandate with a duration of nine years. This instrument must clarify the strategic lines to be achieved for providing the public service. To specify the framework mandate, Article 42 presents the programme contract taken out between the Council and Radiotelevisió Valenciana for the period 2013-2015¹¹ and establishes that RTVV, SAU must present a proposed programme contract before the previous one expires. "In the case of Valencian law, this first framework mandate was incorporated directly into the Act itself as an additional provision, which has prevented any specific discussion regarding the general objectives and strategic lines" (Soriano 2014: 279). Debate and the initial proposal should have taken place in the Valencian parliament according to other authors, which have classified the situation as "evident appropriation of the parliamentary body's power by the executive" (Linde Paniagua, Vidal Beltrán & Medina González 2013: 358).

In the previous section we have referred to the outsourcing of news in the new RTVV Act, which permits an extreme model of television that is still considered as public but has been privatised as far as possible. This, however, did not apply to the new RTVV because the annulment of this legal possibility was contained in the inferior regulation, the one that only affects the following three years. Not even the framework mandate referred to this fundamental issue. Ultimately it was left to the programme contract, carried out by the General Management of RTVV, SAU, to protect news services by preventing them from being outsourced.

The price for the programme contract taken out between the Council and RTVV, in other words the annual funding for the public service, was very small, just 60 million euros, less than half the budget for Telemadrid (138 million). The amount required for the television broadcaster to survive, calculated by an independent professional such as Teresa Díez, did not tally (2013: 88-92). The estimated revenue, both from advertising and from the sale of programmes, came to 10 million euros, which added to the grant would total 70 million, whereas a further 13 million would be required to meet merely the minimum overheads, just to cover the basic needs of the broadcaster.¹²

The programme contract even specified the programming and prioritised the station's news programmes, especially local news.

Table 1. Programme shares

Programme type	Televisió	Ràdio
News	30%	20%
Children and young people	5%	5%
Entertainment	10%	25%
Informative and cultural	10%	10%
Sport	3%	20%

Source: RTVV programme contract 2013-2015, annex I.

<http://www.docv.gva.es/datos/2013/07/18/pdf/2013_7572.pdf>

Based on the law and on the two documents (the one published at the same time as Act 3/2012 on the framework mandate and the subsequent programme contract), the Board of RTVV finally approved outsourcing, for which 12 million euros were allocated. The tender for the three batches was decided in October 2013, and "comments would be made on small budgets presented by Vértice 360, the company awarded the three batches and which is deemed to have probable political ties" (Gavaldà Roca 2014: 381). In article 19.1 the programme contract includes a limitation that would turn out to be insightful soon afterwards and would stop this ridiculous situation from getting much worse:

"In any case, should the redundancy plan be declared null and void, Radiotelevisió Valenciana shall notify the Generalitat of the economic non-viability of the company under the terms contained in this contract, this circumstance being a cause that shall entitle the parties to terminate this programme contract."

The series of administrative clauses governing the service contract in terms of the production and supply of audiovisual content also specified that "declaration of the redundancy plans carried out by RTVV as null and void" is also a cause for terminating the contract (Dirección General RTVV, SAU 2013: 73).

These specifications also provided more information on what the new broadcaster should be like:

Figure 1. Standard programming grid

SETMANA XX							2013						
07	DILLUNS	DI MARTS	DIMECRES	DIUDS	DI VENDRES	DISSABTE	DIUMENGE	07					
08	INFORMATIUS PROPIA					PGM Propia (Redi)	PGM Propia (Redi)	08					
09						PGM INFORMATIUS PROPIA					PGM Propia / Delegada / Ajenas Infantil	PGM Propia / Delegada / Ajenas Infantil	09
10						PGM INFORMATIUS PROPIA (Redi)							10
11						PGM CONTENEDOR PROPIA/DELEGADA (Pgm Propia Redi / Ansu / Documental Ajena / Serie Ajena)					SERIE AJENAS	SERIE AJENAS	11
12						PGM Propia (Redi)	PGM Propia (Redi)	12					
13						PGM Propia (Redi)	PGM Propia (Redi)	13					
14	PGM Propia / Delegada					Pgm Delegado/ Propia	Pgm Delegado/ Propia	14					
15	INFORMATIUS PROPIA (NT9 1ª Ed. + Esports + Oratge)					INFORMATIUS PROPIA (NT9 1ª Ed. + Esp. + Oratge)	INFORMATIUS PROPIA (NT9 1ª Ed. + Esp. + Oratge)	15					
16	PGM INFORMATIUS PROPIA					Pgm Delegado/ Propia	Pgm Delegado/ Propia	16					
17	AJENAS TVM / FICCIO VAL (Redi)					CINE AJENAS	CINE AJENAS	17					
18	PGM PROPIA / DELEGADA / AJENAS INFANTIL					CINE AJENAS	CINE AJENAS	18					
19								19					
20	AJENAS CINE							20					
21						Pgm Delegado/ Propia	Pgm Delegado/ Propia	21					
22	INFORMATIUS PROPIA (NT9 2ª Ed. + Esports + Oratge)					INFORMATIUS PROPIA (NT9 2ª Ed. + Esp. + Oratge)	INFORMATIUS PROPIA (NT9 2ª Ed. + Esp. + Oratge)	22					
23	PGM DELEGADA / PROPIA					Pgm Delegado/ Propia	Pgm Delegado/ Propia	23					
24	PGM PROPIA ESPORTIU	CINE AJENAS	SERIE AJENAS	PGM Propia / Delegada (Debate-entretencimiento)	CINE AJENAS	PGM PRIME TIME DELEGADA / PROPIA	SERIE FICCIO VAL	24					
01	Documentales o pgm propia redi / aneu	Documentales o pgm propia redi / aneu	Documentales o pgm propia redi / aneu	Documentales o pgm propia redi / aneu	Documentales o pgm propia redi / aneu		AJENAS CINE	01					
02	PGM MUSICAL	PGM MUSICAL	PGM MUSICAL	PGM MUSICAL	PGM MUSICAL	Documentales o pgm propia redi / aneu		02					
03	PGM MUSICAL	PGM MUSICAL	PGM MUSICAL	PGM MUSICAL	PGM MUSICAL		Documentales o pgm propia redi / aneu	03					
04						CONNEXIO 9/24	CONNEXIO 9/24	04					
05								05					
06	CONNEXIO 9/24							06					
07								07					

Source: RTVV programme contract 2013-2015, annex I.

<http://www.docv.gva.es/datos/2013/07/18/pdf/2013_7572.pdf>

“The outsourcing contained in the new RTVV Statute makes public tender obligatory, unlike the case in previous years where extensive sections of programming had been outsourced directly via contracts. The tender proposes 3 programming batches for a total value of 9,438,391 euros for 1,371 hours per year:

Batch 1: 487 hours of annual programming. With a container magazine programme broadcast daily, preferably in the afternoon/evening slot. A prime time access broadcast at least two days a week and children’s programming preferably broadcast at the weekend.

Batch 2: 476 hours of annual programming. With a container programme broadcast at least four days a week aimed at the morning/lunchtime slot. A weekly entertainment programme broadcast during prime time and a daily game show.

Batch 3: 408 hours of annual programming. With 4 weekly prime time programmes. These programmes should match the following genres: Docu-reality, Coach-show, Factual, Info-entertainment, Docu-show, Information-news/interviews, Reality-game, or any other proposal by the bidder. And minimum six weekly cultural programmes.” (Dirección General RTVV SAU, 2013: 7-8)

6. The law closing down RTVV and the uncertain future

All this planning, the new laws, tenders, attempts to create a new broadcaster from the ashes of the previous one, suddenly came up against an unprecedented political decision in Spain whose equal can only be found in the shutting down of the Greek public broadcaster (ERT) in June 2013. The closure of Canal 9 was publicly explained at a press conference by the head of the Council, Alberto Fabra, on 6 November 2013, one day after the announcement of the ruling of the Supreme Court (TSJCV) declaring null and void the redundancy plan to fire 1,198 RTVV workers. Fabra’s contribution to the reasons for this closure was to say that it was preferable to close down the broadcaster rather than closing down public schools or hospitals. An argument that was not even his own: the former Minister of Public Works and briefly President of the Principality of Asturias, Francisco Álvarez Cascos, was the first to announce a choice between public hospitals or broadcasting, in relation to the autonomous community of Asturias (Miguel de Bustos & Casado del Río 2012: 225). This decision should be placed in its political context of a growing trend in the privatisation and minimisation of public media carried out for many years by the Partido Popular party, both at the level of autonomous community and also the state. Unfortunately this trend forms part of a similar current affecting the whole European public broadcasting system for several decades, as the European Broadcasting Union warned recently: “The visibility and sustainability of national players, and therefore the national audiovisual industry, is endangered.” (EBU 2015: 7). We should

also note, in relation to this closure, the dire economic situation of RTVV at the time, having accumulated debts in excess of one billion euros after 20 years of disastrous management (López-Olano 2015: 137-143).

Immediately after this announcement a complicated legal operation was set in motion to make the decision effective, an operation full of improvisation rather than good legislative work. Three editions of the autonomous parliament’s bulletin, the *Diari Oficial de la Comunitat de València*, were published on the same day. Act 4/2013, of the Generalitat, suppressing the provision of radio and television broadcasting services at an autonomous community level¹³ (the definitive closure law) was passed with only the PP party voting in favour.

In various texts Professor Vidal Beltrán has discussed these complex legal perspectives resulting from such legislative improvisation (2014; 2015). The following is particularly of note:

“The whole itinerary, from chaos to nonsense, in the form of accelerated political agreements involving decisions of legal import (Decree Law 5/2013, of the Generalitat, amending Act 3/2012, of the RTVV Statute, and Act 4/2013, of the Generalitat, on the closure of RTVV) whose consequences cannot be separated from the potential appeals that may be brought, both regarding appropriateness according to constitutional law and also how this affects the particular rights of workers, the companies that have some kind of contractual relationship with RTVV, on stopping use of the broadcasting bandwidth, etc.” (2014b: 71)

We should also note evidence that the reason and aim of Act 4/2013 on closing down RTVV was to reject Ruling 2338/13 by the Supreme Court of Valencia (Tribunal Superior de Justicia de la Comunitat Valenciana), which annulled the redundancy plan for Canal 9 (Andrés Segovia 2014), and to avoid acting in accordance with that established by this ruling, which would contradict article 118 of the Constitution which establishes “the obligation to comply with rulings and other final decisions of courts and tribunals”. Not to mention the legal reasons for the existence of public broadcasters in communities with their own language:

“Autonomous communities are more justified than (the Spanish broadcaster) TVE. The Constitution does not establish that RTVE must exist. Autonomous powers are much clearer. Reasons of public interest are easier to find in autonomous communities: minority language, proximity, development of local broadcasting industry in deficient zones.” (Boix Palop 2013: 25)

In the weeks between the announcement of the closure on 5 November 2013 and the definitive shutdown at 12.09 on 29 November, there was no control of the broadcaster and news was self-managed, partly via assembly, during the death throes of Canal 9. The last few hours (from the time the liquidation law was passed to the time when broadcasting actually stopped),

accurately called “Operation Telefunken” by a journalist¹⁴, deserve to pass into the annals of absurdity.

During the months following the closure there were further actions that were also strongly improvised in nature. Dismissal of the 1,600 workers was delayed until May 2014 which, together with the redundancy payments finally agreed with the trade unions (except for the CGT), resulted in a huge cost, calculated by the Council itself at 86 million euros. This figure does not even take into account the revenue from advertising that had been generated while the network was still running, not to mention the public service the broadcaster had provided, no matter how little this had been. The budget for 2015 was 90 million euros while it is estimated that, between 2014 and 2015, RTVV would have cost everyone in the Community of Valencia more than 220 million.¹⁵ Although the Council stated, in June 2015, that RTVV had already been wound down, the end is still not in sight: the only thing settled was the redundancy plan, dismissing trade union representatives, the last ones to leave the Burjassot building. Meanwhile a series of receivers have been responsible for closing down the firm (three resigned from their position up to the political changeover). Scandals have erupted during these months, such as the RTVV branch in Alicante perhaps being lost due to not paying its rent,¹⁶ and others of a legal nature such as the redundancy payment of 200,000 euros to Juan Prefacio, the senior manager charged in the Gürtel case, after the company's lawyer, David González Wonham, withdrew his claim.¹⁷

Consensus among the opposition regarding the need to restore autonomous public service broadcasting has been evident since the beginning; but not only among these political parties. The PP also made declarations of this type during the period, contrasting with their unprecedented decision to close down the company. During the parliamentary hearing of the Popular Legislative Initiative (ILP) “for public Valencian radio and television”,¹⁸ which collected 90,000 signatures in favour of re-establishment and was debated in the Valencian parliament in February 2015, the government agreed that it was necessary to restore RTVV. But the amendment it presented for the whole proposal completely demolished the spirit of the initiative, so much so that even its promoters disowned it.¹⁹ Finally the ILP was transformed into Act 5/2015, of 2 April, on the Public Service of Valencian Broadcasting,²⁰ whose article 1 states its object: the right to receive and communicate information and opinion in one's own language. However, unlike the demands made by those promoting the initiative, this specifies that such communication would “preferably” be in the Valencian language. The biggest trap in this Act can be found in additional provision three, regarding the conditions for starting up the service:

“1. It should not entail an increase in the public debt of the Generalitat or a failure to comply with the policy or criteria of budget stability and public deficit established by Organic Act 2/2012, of 27 April, on budget stability and financial sustainability.

2. It should not entail a reduction in the budget items allocated to the public services of health, education and social welfare.

3. It should not entail an increase in fiscal pressure on citizens via directly applied or assigned taxes.

4. The public organisation that previously provided the Valencia public broadcasting service should be definitively liquidated.

5. *The legal rulings should become definitive that are still pending on the constitutional nature of the Act suppressing the provision of autonomous community broadcasting services owned by the Generalitat, as well as those regarding the winding down and liquidation of Radiotelevisió Valenciana, SAU and the redundancy plan regarding the termination of the employment relations with the previous workforce.*”

This large number of conditions obviously makes the Act difficult to implement. Especially the first regarding budget stability and the public deficit, which the Community of Valencia is still very far from achieving. Professor Vidal Beltrán describes the regulation as “another legal blunder in this chaotic reality show” (2015). In any case, this peculiar Act, passed just after the elections, did not even annul the previous laws as it contains no final annulling provisions.

This legal mess has started to unravel after the political change resulting from the autonomous community elections on 24 May 2015. The need to restore the service as soon as possible was one of the agreements reached in the so-called Botanical Pact and there is a deadline for approving what will be the new RTVV Statute. Careful analyses by experts have proliferated recently (Marzal, Izquierdo & Casero 2015; Rodríguez Santonja 2015). Even the academic world has got together and drawn up a joint consultative document with a series of recommendations regarding what a medium that is ultimately at the service of citizens should be like (Comissió d'Experts en Comunicació de les Universitats Valencianes, 2015). Act 12/2015, of 29 December, to restore the autonomous public service broadcaster,²¹ has set the deadline of summer 2016 for the commencement of the future law on the public service of Radiotelevisió Valenciana. This provisional law also annuls the law closing down RTVV so that, as announced by the Socialist party of Spain (PSOE), the appeal will be withdrawn that was made to the Constitutional Court for violating “the principle of legal certainty”.²² The Spanish High Court will therefore reopen the collective suit (temporarily suspended until the constitutional nature of the law had been resolved) regarding RTVV's nullified redundancy plan, brought by the only trade union that did not sign the redundancy plan, the CGT. The provisional law also sets the conditions to re-establish the public service and states that the Council may agree “the provisional or trial recovery of the signal” and to do so will have, exceptionally, the assets, broadcasting rights, audiovisual archive and technological

resources of the extinct RTVV. To conclude, we could state that the first step has now been taken. This is a unique opportunity and we must take advantage of it. The prospects are good; the possibility of not starting from zero but close to it gives us a second chance to avoid making the same mistakes. Citizens must pay close attention and bear in mind that the future of broadcasting is taking shape before our very eyes.

Notes

1. http://www.docv.gva.es/portal/ficha_disposicion.jsp?id=26&sig=2165/2006&L=1&url_lista [Consulted: 9/3/2016]
2. <http://www.boe.es/buscar/act.php?id=BOE-A-2010-5292> [Consulted: 9/3/2016]
3. http://www.congreso.es/consti/estatutos/ind_estatutos.jsp?com=79 [Consulted: 9/3/2016]
4. http://www.boe.es/diario_boe/txt.php?id=BOE-A-1980-724 [Consulted: 9/3/2016]
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6. http://www.docv.gva.es/portal/ficha_disposicion_pc.jsp?sig=0520/1984 [Consulted: 9/3/2016]
7. An obligation that will be repeatedly violated in the future, also by the PP.
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9. http://www.docv.gva.es/portal/ficha_disposicion.jsp?id=26&sig=007190/2012&L=1&url_lista= [Consulted: 9/3/2016]
10. http://www.boe.es/diario_boe/txt.php?id=BOE-A-2012-10385 [Consulted: 9/3/2016]
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Reality TV as an experimental laboratory for new forms to integrate advertising within generalist DTT channels in Spain

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Abstract

Our study examines the interactions between the forms of advert insertions methods favoured by the latest European standards and by programming flows. This article focuses on the infotainment genre, which displays both a wide variety of forms of advertising and very high rates of advertising saturation, and where the main innovations are occurring in the development of advertising messages. An analysis was conducted over the course of one week of the 2012-2013 season, focusing on the public channels La1, La2 and TV3, and the private channels Antena 3, Telecinco, Cuatro and laSexta. The research technique used was content analysis. The study reveals, among other things, that the weight of innovation falls on the private channels, and that they prioritise those forms of insertion that do not interrupt the flow of the program.

Keywords

Television, advertising, scheduling, infotainment, genres.

Resum

El nostre estudi examina la interacció entre les formes d'inserció de publicitat afavorides per les últimes normatives europees i el flux de programació. Aquest article se centra en els gèneres de l'Info-show, on es donen tant una gran diversitat de formes de publicitat com unes taxes molt altes de saturació publicitària, i on es produeixen les principals innovacions en el desenvolupament de missatges publicitaris. Es va realitzar l'anàlisi d'una setmana de la temporada 2012-2013 dels canals públics La1, La2 i TV3, i dels canals privats Antena 3, Telecinco, Cuatro i laSexta. La tècnica de recerca utilitzada va ser l'anàlisi de contingut. L'estudi revela, entre altres coses, que el pes de la innovació recau sobre els canals privats i que prevalen les formes d'inserció que no interrompen el flux del programa.

Paraules clau

Televisió, publicitat, programació, info-show, gèneres.

1. Introduction

Advert insertion methods in the media have been evolving and adapting to the needs of the audience, technological innovations and the policies of each TV channel. Despite the current communication ecosystem being characterised by digital multicasts, the fact is that today television remains one of the media with the most advertising content (Wilbur 2008) and indisputably the most popular medium for the consumption of entertainment and information, making it the priority channel for most advertisers (Velusamy et al. 2008).

In the context of general and free-to-air television, the major programming phenomenon since the mid-1990s has undoubtedly been the spectacular increase in the range of reality TV shows, included according to the classification of

EUROMONITOR¹ in the infotainment sub-genre (Prado and Delgado 2010). Despite having different purposes, both public and private channels have increased their infotainment ranges, diversifying the genres on offer and investing in constant innovation in a sub-genre that is not only profitable in terms of production costs, but also attracts respectable viewing figures.

Present in all timeslots, but with a special emphasis on primetime, infotainment programmes have become a star attraction of televisual programming (Prado and Delgado 2010) and, with this premise, this investigation analyses the relationship between advertising content and infotainment, dealing with the various forms of advert insertion. Many of them have been incorporated very recently, facilitated in part by the new Audiovisual Communication Services Directive (2010/13/UE) of the 10th March 2010, which abolishes the

Television without Frontiers Directive (DTVSF) and establishes the standards that currently regulate TV advertising in the EU.

This new standard has favoured the expansion of advertising, which is no longer limited to the breaks between programmes, but is now being inserted in various ways which do not necessarily entail the interruption of the programme. This phenomenon, however, has not been extensively dealt with by scientific investigations, and it shall be the focus of our framework. Furthermore, we shall be focusing on Spain, because, amongst other reasons, previous studies show that Spain is the country with the highest advertising saturation indexes in Europe (García-Muñoz et al. 2014).

The main objectives of this investigation are based around establishing the advertising saturation indices during transmission of infotainment programmes, analysing the various advert insertion methods, checking the various publicity genres that are used the most and analysing the reactions between advert insertion methods, publicity genres and the infotainment genres.

2. Advertising and infotainment

2.1 TV advertising – the most effective publicity

Advertising is an indispensable prerequisite to help manufacturers to sell their products. In the current, highly competitive media ecosystem, television continues to be the fastest and most widespread method of publicity, despite its complexity and cost (Shap, Beal and Collins 2009). All of the scientific studies surrounding TV advertising that have been written in recent years concur, and emphasise, that this medium is the dominant player on a worldwide level for advertising expenditure in the third millennium (Ramalingam et al. 2006; Lee, Carpenter and Meyers 2007; Saha, Pal and Pal 2007; Danaher, Dagger and Smith 2011; Vahid Dastjerdi, Davoudi-Mobarakeh and Zare 2012; amongst others). As Shap, Beal and Collins argue: “TV, as a whole, remains the ultimate ‘mass medium’ capable of reaching vast numbers of viewers” (2009, 214). Even in times such as these, battered by the grave global economic crisis, a study by ZenithOptimedia (2009, cited in Danaher, Dagger and Smith 2011) states that when advertisers have to reduce their budgets, the last medium to have its funding cut is television, because companies remain convinced of the efficiency of this medium as a vehicle for publicity.

As such, there are many studies showing the superiority of television advertising in terms of effectiveness, when compared to publicity broadcasts via other methods. Ramalingam et al. sum up the three advantages of advertising via television as follows: “First, it has a great influence on consumers’ taste and perception. Second, it can reach a large audience in a cost-efficient manner. Third, its sound and moving images create a strong impact” (2006, 159). For their part, Lee, Carpenter and Meyers (2007) emphasise the persistence and omnipresence of television when compared to other types of media; and how

that omnipresence in particular plays a fundamental role in shaping the attitudes of television viewers, and consequently, the attitudes of consumers. The study by Vahid Dastjerdi, Davoudi-Mobarakeh and Zare (2012) determines that the efficiency of TV adverts when compared to the written press can be attributed to the former being more persuasive.

As a matter of fact, some studies warn of the need to adapt to the new digital TV advertising environment in order to maintain this effectiveness. Carrillo (2005) states that advertising messages must metamorphose in order to adapt to the interactive possibilities of digital television, pointing out that the challenge facing advertising content is to try not to focus on the “traditional spots”, as these will lose prominence on public television in the near future. It seems clear that advertising content must evolve to find new forms of communication that will grab the attention of television viewers in a highly competitive climate. Accordingly, Arana (2011) points out that there have already been transformations with regard to the costs and characteristics of contemporary television advertising.

Another aspect to take into consideration is that the price of TV advertising is directly related to programme ratings. According to the study carried out by Danaher, Dagger and Smith (2011), the genre of a given programme becomes a key element in determining the viewing figures it can attract. Accordingly, infotainment programmes have become a very appealing genre for advertisers.

2.2 The power of infotainment

In the current post-television era, reality TV shows have become a key part of television programming (Steemers 2004; Nabi 2007; McMurria 2008; Prado and Delgado 2010; Curnutt 2011; amongst others) due to its capacity to attract and retain vast audiences (Waisbord 2004; Hill 2007; amongst others). This demonstrates that, after more than a decade of the reality TV “boom”, this genre is still flourishing (Beck, Hellmueller and Aeschbacher 2012). An example of the strength of this type of programme is the fact that in countries such as the United States, the United Kingdom and Spain, *Big Brother* has so far run for 17-18 series since its first broadcast in 1999-2000; not to mention the 32 series of *Survivor* that CBS has broadcast since 2000. These ‘reality games’ continue to attract millions of TV viewers, despite their viewing figures having dropped over the years. This phenomenon is not limited to a few specific countries; rather, it has spread worldwide.

One of the most notable aspects of infotainment is the capacity of such programmes to evolve to bring together massive audiences. As stated by Beck, Hellmueller and Aeschbacher: “The overview of the genre further shows that modern reality TV formats are usually hybrids of existing genres. (...) In order to maintain high viewer interest, new combinations and variations are permanently developed: mixing genres is seen as a strategy to reach audiences as large as possible” (2012, 22). The work of these authors makes it clear that the main goal of reality TV is to get its audiences involved, so as to attract advertisers (Beck,

Hellmueller and Aeschbacher 2012, 22). As a matter of fact, a clear example that shows the interest that advertisers have in this type of programme is the fact that since it began in 2002, the talent show *American Idol* has become the most expensive programme on American television, with its last eight seasons having had the highest prices for 30-second advertising slots in the United States (Steinberg 2011).²

Although reality TV is just one of the forms in which the infotainment macro-genre manifests itself on contemporary television, it has always been the main content of the infotainment that has captured the interest of the scientific community, becoming a complex and dynamic field of investigation, due to the enormous scientific diversification it has undergone since the 1990s.³

2.3 Study related to advertising and infotainment

Although televised advertising and infotainment, as objects of study, have long been extensively investigated both in Spain and worldwide, works combining both elements are rare. As such, any specific study of the relationship between the various forms of advert insertion and the programmes in this sub-genre is only just beginning, despite the fact that notable advances have taken place in this regards, essentially limited to English-language scientific literature.

So far, the main analytical perspectives that have been developed focus primarily on content analysis and studies of the consumption of advertising messages broadcast on these television programmes, labelled by the reviewed literature under the terms 'Factual Entertainment' and 'Reality TV'.

In the framework of content analysis, the most relevant work to make a link between advert insertion and infotainment programmes is that undertaken by Derry (2004), who examines the advertising techniques used by more than 40 reality shows broadcast between 2000 and 2003 on American television. For Derry, reality TV programmes have become 'advertainment' spaces, to the point of becoming profitable publicity vehicles in the digital era. In the author's own words:

"Reality TV provides a clear example of commercial culture in which mediation is primarily designed to sell (...). Individuals, experiences, and even the medium itself are repeatedly marketed in a genre whose absorption of direct and indirect forms of selling is currently spearheading a conflation of advertising and entertainment. The result is what the industry refers to as "advertainment", programming designed to sell as it entertains. As "brand content" the shows themselves act as a marketing vehicles in addition to attracting audiences for spot advertisers" (Derry 2004, 1).

Due to the flexibility of the various formats that reality television slots demonstrate, Derry argues that these are the ideal place to experience new alternatives to classic advertising breaks, and multifaceted forms of advertising which are easily avoidable by viewers. Accordingly, there are many scientific works which, when seeking to analyse the phenomena of 'ad-skipping' and

'ad avoidance' (Speck and Elliot 1997; Chowdhury, Finn and Olsen 2007), have suggested that some of the traditional forms of advertising communication are no longer optimal or relevant in the new digital media ecosystem. According to Schweidel and Kent (2010), the "reality" genres show more ad-skipping than other TV genres. Derry's investigation is focused mainly on the analysis of product placement, sponsorship and co-production demonstrated by the programmes selected for the study.

Another aspect that Derry analyses in his investigation is the role that the Internet plays in infotainment. The author points out that another element of interest for advertisers is "the Web as another promotional vehicle (...) to allow synergetic advertainment to span different media" (2004, 8-9). Accordingly, reality TV shows would appear to be an excellent platform for advertisers faced with the current change from single-medium consumption to the consumption of multiple, simultaneous media, meaning that media multitasking by the spectator is channelled via these TV slots, also affecting the advert content that is incorporated. In the cyberspace infotainment environment, advertisers are seeing a route to connect their adverts with the right consumers (Fitzgerald 2003).

The study of product placement in infotainment programmes has attracted the interest of various authors, being one of the most commonly discussed points with regard to the convergence of advert insertion and this macro-genre (Russell 2002; Kaplan 2004; Hudson and Hudson 2006; La Ferle and Edwards 2006; amongst others). In line with the points made by Derry, Kaplan (2004) highlights the ideal nature of reality TV programmes for the insertion of product placements, especially during reality TV contest shows. These allow for improved fusion of marketing and narrative cohesion; the greatest exponent of the exploitation of such integration is the American contest show *Survivor*.⁴ Accordingly, for Kaplan, "the trick to effective product placement on a reality series is to make it seem like the brand just belongs there. That is often easier said than done" (2004, 22). The works of Russell (2002) and Hudson and Hudson (2006) agree on that level; they consider that infotainment shows are well-suited to the product placement advertising technique, as it is possible to integrate a product into the context of a programme in a natural manner.

Another work analysing the publicity messages in this macro-genre is that of Dahlger and College (2001), who carried out an analysis of the content of the adverts broadcast during morning talk shows in the United States with the goal of identifying the key features of the advertising broadcast during the programmes. Albiniak (2012) points out that these programmes are very attractive to advertisers due to the loyalty of the viewers.

The investigations that have been carried out within the framework of audience reception studies, with regard to the object of our study, are few and only incipient. Kent and Scheweidel (2011) analyse the audience behaviour during selected types of programmes, including infotainment shows, with the goal of observing how viewing figures fall or rise during

the most expensive advertising timeslots. The works of Edwards (2006) and Patino, Kalcheva and Smith (2011) are centred around the behaviour of adolescents and pre-adolescents with regard to the adverts broadcast during reality TV shows. In the case of Edwards, his study is based exclusively on product placements. For their part, Patino, Kalcheva and Smith conduct a survey of more than 1,098 American subjects aged between 8 and 18 to study the level of connectivity of young television viewers with reality TV programmes to improve the effectiveness of programming decisions, media buying, product placement and the social networking strategies of the programmers and the advertisers.

In summary, the form (that is, the insertion technique) and the type of content that are adopted by advertising messages in reality TV programmes eclipse investigations that seek to link advert insertions with those programmes that fall under the infotainment macro-genre, whilst reception studies are based around the efficiency of the aforementioned publicity messages. Nonetheless, it should be underlined that the existing scientific literature to date demonstrates that this is still unexplored territory. However, some more generalised studies, centred around TV advertising and the new forms of advert insertion (Chowdhury, Finn and Olsen 2007; Steininger and Woelke 2008) have alerted the scientific and business communities to the necessity of implementing studies in this direction.

Accordingly, our work purports to contribute to the generation of empirical knowledge surrounding the study of the new forms of advert insertion that have been developed under the banner of reality TV shows in Spain with the implementation of digital terrestrial television and the new national and European regulatory standards.

3. Methodology

The findings presented in this article are the result of the investigative project "Reality TV: New advertising strategies in European general Digital Terrestrial Television" (CSO2012-39232), financed by the Ministry of Science and Innovation and carried out by a team from the consolidated investigation group GRISS [*Grup de Recerca en Imatge, So i Síntesi / Image, Sound and Synthesis Investigation Group*, Universitat Autònoma de Barcelona] (ref. 2009SGR1013). The data refer to the TV programming and advertising messages included in the same, excluding product placement and branded content. In order to obtain these data, we have used the methodological instrument of content analysis, which has been carried out by various codifiers via appropriate evaluation of both the reliability of the multi-coding and the suitability of the categories.

The channels we have taken as our sample are a selection of the Spanish general-purpose channels with the widest audiences, which all existed prior to the introduction of digital terrestrial television: La1, La2, TV3, Antena 3 TV, Telecinco, Cuatro and laSexta.

As has already become the norm for investigating television programming, the dates correspond to a week of programming (in this case, the week of the 14th through the 20th January 2013), of the 2012-2013 season, taking into consideration all the timeslots: morning (7.00-13.30), mid-day (13.30-15.30), dinnertime (15.30-18.00), evening (18.00-20.30), prime time (20.30-22.30) and night (22.30-01.00).

For the classification of television content, we have used a typology developed and previously used by EUROMONITOR, where the genre identification of the program is based on three variables: the macro-genre, genre and micro-genre. A detailed description of this classification system can be found in Prado and Delgado (2010). The typology used for the identification of advertising genres and modalities of insertion corresponds to the categories developed and validated in the CSO2009-12822 and CSO2013 R+D+I projects, which were financed by the Spanish state. The genres contemplated are: accreditation, self-promotion, interactive, endorsement, sponsorship, asynchronous sponsorship, product placement, advertorials, overprinting, spots, telepromotion and teleshopping (Prado (IP) 2009; Delgado et al. 2014; García-Muñoz, Plana and Ferrer 2014). Product placement is excluded from analysis in this article, because a thorough study of this in relation to the selected sample would require a second monograph, to analyse the presence of this advertising genre exclusively and in depth.

We also define different modes of insertion: block, isolated commercials, multiscreen commercials, multiscreen programmes, overprinting, morphing, openings, embedding, credit sequences and virtual embedding (Prado (IP) 2009; Delgado et al. 2014; García-Muñoz, Plana and Ferrer 2014). Furthermore, according to their mode of insertion into the programming flow, we have differentiated between interstitial advertising which forms part of the flow of the transmission, interrupting the delivery of programming content (whether between programmes, or parts of the same), and concealed publicity, which means that which is imposed in synchronisation with the flow of the programme, without interrupting it.

The contents analysed were recorded in the GRISS laboratory with a technological device capable of capturing and storing the original signal with all its features, including its metadata. The resulting programme bank is accessible by the group's researchers through a proprietary network, so that it may be analysed and classified. For data entry, a "TV programming monitor" application has been implemented that allows for the entry of data concerning all the analysis variables relating to programmes and advertising with a high degree of automation, promoting efficiency and minimising errors on the part of the encoders. We then designed and implemented a Business Intelligence System to exploit the information contained in the application "TV programming monitor", using the Oracle Business Intelligence tool.

4. Results

4.1 Infotainment in Spanish TV schedules

The range of programmes on Spanish general-purpose television is based primarily on factual, fiction and infotainment (representing 86.6% of total programming time) broadcasts, with the other macro-genres having a minority presence. This policy of programming, with an extreme focus on these three macro-genres, occurs equally in public and private channels, although the strategy decisions are quite different. While public channels commit very prominently to broadcasting factual programmes, in the case of the private channels the range of the three main macro-genres is much more similar. In the case of infotainment, this is clearly the television content of choice for private channels (see Table 1).

In the case of genre distribution, Spanish operators mainly offer docu-soaps, talk shows and reality shows, with these three accumulating between them 84% of the time allotted to the infotainment range. With regard to the genres that have the greatest presence, we should highlight satirical current-events programmes and 'reality games' (see Table 2), whose on-screen presence is very uneven throughout the season, due mainly to the broadcast routine that characterise this genre and entail high-output broadcast periods, followed by "rest" periods between two distinct reality games.

Genre differences between the infotainment range of public channels and that of private channels are obvious. In the case of public channels, these focus their basic range on documentary and interview programmes. Documentaries with plotlines linking their chapters (docu-soaps) and interviews are formats that were not scheduled on the private channels during the period studied. However, it is indisputable that private channels offer a more diverse infotainment range, which attests that the range of this macro-genre, on private television in Spain, is not only much larger in quantitative terms than on public television, but also much richer.

4.2 Infotainment advertising saturation

The rate of advertising saturation during broadcasts of infotainment programmes in Spain is very high, exceeding the time intended for the broadcasting of advertisements at the time of the program. This circumstance is partly explained by the fact that all forms of advert insertion are counted, whether they interrupt the program flow (interstitial advertising) or occur during the broadcast (concealed advertising).

Ownership of a given channel is a key factor here. Much of this phenomenon can be explained by the fact that our sample contains two RTVE channels (TVE1 and La2) that do not broadcast advertising. As such, the advertising saturation rates on the private channels (especially Antena 3, Telecinco and Cuatro) are much higher than those of the public channels (see Table 3).

When analysing advertising saturation for the infotainment genre, the court show genre is where the advertising saturation

Table 1. Description of programming structure

Programming structure	Total	Public channels	Private channels
Factual	47.9%	65.9%	34.5%
Fiction	25.2%	21.9%	27.6%
Infotainment	13.5%	0.9%	23.0%
Contests	4.2%	3.1%	5.1%
Shows	2.7%	1.3%	3.8%
Sports	2.0%	1.5%	2.4%
Children	1.8%	-	3.1%
Others	1.3%	2.3%	0.5%
Education	0.8%	1.9%	-
Religion	0.4%	1.0%	-
Youth	0.2%	0.3%	0.1%

Source: Authors using Euromonitor data from project CSO2012-39232.

Table 2. Infotainment breakdown by genre

Gèneres de l'Info-show	Total	Canals públics	Canals privats
Docu-series	37.1%	67.1%	36.2%
Talk shows	32.5%	-	33.4%
Reality shows	14.4%	-	14.8%
Current-events satire	6.4%	-	6.6%
Reality games	6.2%	-	6.4%
Court show	2.6%	-	2.6%
Docu-soaps	0.5%	18.3%	-
Interviews	0.4%	14.6%	-

Source: Authors using Euromonitor data from project CSO2012-39232.

Table 3. Infotainment advertising distribution

Advertising vs. programme content	Total	Public channels	Private channels
Programme content time	48.6%	95.8%	47.2%
Advertising time	51.4%	4.2%	52.8%

Source: Authors with data from project CSO2012-39232.

Table 4. Infotainment advertising distribution by channel

Advertising vs. programme content	Public channels			Private channels			
	La1	La2	TV3	Antena 3	laSexta	Telecinco	Cuatro
Programme content time	99.5%	99.0%	79.6%	38.1%	76.1%	33.5%	38.5%
Advertising time	0.5%	1.0%	20.4%	61.9%	23.9%	66.5%	61.5%

Source: Authors with data from project CSO2012-39232.

Table 5. Infotainment advertising distribution by channel by genre

Infotainment genre	Programme time	Advertising time
Documentaries	62,89%	37,11%
Talk shows	37,46%	62,54%
Reality shows	30,75%	69,25%
Current-events satire	64,67%	35,33%
Reality games	53,68%	46,32%
Court shows	15,14%	84,86%
Docu-soaps	79,6%	20,4%
Interviews	99,0%	1,0%

Source: Authors using Euromonitor data from project CSO2012-39232.

is higher, with a rate of nearly 85% of broadcasting time (see Table 4). With values of around 60% of broadcasting time, reality shows and talk shows also have very high rates of advertising saturation. Unsurprisingly, from this data it can be seen that the infotainment genres broadcast by the public channels (docu-soaps and interviews) have the highest advertising saturation.

4.3 Concealed vs interstitial publicity

The study reveals that one of the major phenomena of new forms of advertising insertion in infotainment programmes is concealed advertising, i.e. advertising which occurs without interrupting the programme (see Table 6). Accordingly, we can observe that concealed advertising almost exactly duplicates the figures for interstitial advertising and in addition, we should emphasize the importance of concealed advertising for private channels, as it accounts for 65% of the advertising broadcast during infotainment programming.

Although forms of inserting advertising messages into programming content are still being explored, the results essentially point to two methods of insertion: overprinting and multi-screen. In the first case, this is the form that self-promotion essentially takes, and it involves the promotion of the image of the channel or of other proprietary television content. On the other hand, TV spots can be broadcast without interrupting the programme via the multi-screen method (see Table 7).

The joint broadcast of program content and advertising content (trademark, self-promotional or both at once) make for

Table 6. Interstitial advertising and concealed advertising

Advertising vs. programme content	Total	Public channels	Private channels
Advertising time	51.4%	4.2%	52.8%
Interstitial	35%	92%	35%
Concealed	65%	8%	65%

Source: Authors with data from project CSO2012-39232.

Table 7. Distribution of concealed advertising, by advert genre

Insertion method	Advertising genre	Time
Multi-screen	Self-promotion	3.8%
	Overprinting	0.7%
	TV spot	95.5%
Overprinting	Self-promotion	98.7%
	Endorsement	1.3%

Source: Authors with data from project CSO2012-39232.

Table 8. Distribution of interstitial advertising, by insertion method

Insertion method	Time
Isolated advert	2.6%
Block	96.3%
Openings	0.2%
Morphing	0.3%
Credit sequences	0.4%
Others	0.2%

Source: Authors with data from project CSO2012-39232.

very cluttered screens and ultimately constitute a very intrusive experience for the viewer, as can be observed in the following examples:

If we take into consideration only those adverts that occur between programmes, the most common form of insertion during infotainment broadcasts is the classic commercial break. Amongst the less commonly used forms of interstitial advert insertion, we can highlight another classic form of insertion in the schedules of general-purpose TV stations, such as the isolated advert (see Table 8).

Image 1. Advert shown without interruption during the programme *Sálvame* (Save Me) (Telecinco)

Method of insertion: Overprinting.



Source: Screen capture, 2012-13 season.

Image 2. Advert shown without interruption during the programme *El Hormiguero* (The Anthill) (Antena 3)

Method of insertion: Multi-screen.



Source: Screen capture, 2012-13 season.

4.4 Advertising genres and its methods of insertion into infotainment

With regard to the distribution of publicity genres by channel during infotainment broadcasts, the results obtained reveal a majority presence of self-promotion across all the channels analysed, with this accounting for 100% of airtime in the case of the RTVE corporation, on account of its carrying no commercial advertising, as explained previously (see Table 9).

Remaining in the sphere of public ownership, the independent Catalan channel TV3 is characterised by a preference for TV spots over self-promotion, a fact which makes it an oddity in the landscape of Spanish TV.

As for private channels, self-promotion seems to be the publicity method *par excellence* during reality TV broadcasts, albeit with less dynamism in the case of laSexta. TV spots fall far behind. Any other genres are present as minorities only, although it is worth noting the presence of sponsorship on laSexta, and teleshopping on Cuatro.

Regarding the breakdown of advertising by insertion method, there is a clear correlation, as we have already seen, between

insertion methods and advertising genres. As such, TV3 would be the most traditional channel, with a high presence of blocks (see Table 10). In the case of private channels, with the exception of laSexta, there is a clear correspondence between the prominence of overprinting (which is an optimal self-promotion method) and, to a lesser extent, the block, as a classic form of advert insertion. On laSexta, for this same reason, we see a higher incidence of ad breaks (blocks), which is in line with the fact that it also had the highest percentage of advertising spots out of all the genres present in infotainment.

The correlation between publicity genres and advertising message insertion methods may be intuited from the previous isolated results, and it is only confirmed when we examine these two variables in relation to each other (see Table 11). The isolated advert is used for various advertising genres, especially endorsement (56.4%), whereby a product or brand is alluded to in an isolated manner during the course of a programme. In the same way, the isolated advert is also an ideal method for telepromotion. As for advert blocks, the genre *par excellence* is the conventional TV spot (70.3%) and,

Table 9. Breakdown of advertising genres in infotainment

Publicity genre	Total	Public channels			Private channels			
		La1	La2	TV3	Antena 3	Telecinco	laSexta	Cuatro
Self-promotion	71.1%	100%	100%	21.1%	76.9%	71.6%	53.9%	79.8%
Sponsorship	0.4%	-	-	14.8%	0.5%	0.2%	1%	0.3%
Asynchronous sponsorship	0.01%	-	-	-	-	-	-	0.1%
TV spots	24.7%	-	-	64.1%	21.3%	25%	41.1%	13.5%
Endorsement	1.5%	-	-	-	0.6%	2.4%	0.1%	-
Overprinting	0.0%	-	-	-	0.1%	0.03%	-	-
Telepromotion	0.6%	-	-	-	0.5%	0.2%	3.8%	0.1%
Teleshopping	1.5%	-	-	-	-	0.5%	-	6.4%
Accreditation	0.1%	-	-	-	0.2%	0.1%	0.1%	-

Source: Authors with data from project CSO2012-39232.

Table 10. Breakdown of advert insertion methods in infotainment

Insertion method	Total	Public channels			Private channels			
		La1	La2	TV3	Antena 3	Telecinco	laSexta	Cuatro
Isolated adverts	0.9%	-	-	7.3%	1.2%	1.0%	1.6%	-
Blocks	33.0%	-	-	92.7%	13.0%	30.4%	65.4%	25.0%
Morphing	0.07%	-	-	-	0.1%	0.1%	-	0.18%
Multi-screen	0.7%	-	-	-	10.7%	-	0.2%	-
Overprinting	65.3%	100%	100%	-	75.0%	68.5%	32.8%	74.7%
Credit sequences	0.01%	-	-	-	-	-	-	0.1%
Openings	0.02%	-	-	-	-	-	-	0.02%

Source: Authors with data from project CSO2012-39232.

Table 11. Breakdown of advert insertion methods, by advert genre

Advert genre	Insertion methods							
	Isolated advert	Block	Opening sequences	Morphing	Multi-screen	Overprinting	Credit sequences	Unassigned
Self-promotion	7.1%	19%	23.8%	29.8%	3.8%	98.8%	-	4.5%
Sponsorship	5.2%	0.9%	7.5%	-	-	-	-	-
TV spots	-	70.3%	-	39.5%	95.5%	-	-	22.5%
Accreditation	9%	-	-	-	-	-	7.8%	-
Endorsement	56.4%	0.7%	-	-	-	1.2%	-	-
Overprinting	1.5%	-	-	-	0.7%	-	-	-
Telepromotion	20.8%	1.2%	-	-	-	-	-	-
Teleshopping	-	4.4%	-	-	-	-	-	-
Signposting	3.0%	3.5%	68.7%	30.7%	-	-	92.2%	73.0%

Source: Authors with data from project CSO2012-39232.

although it falls some way behind, self-promotion (18.9%) is in second place. In the case of the opening sequence method, this is more significantly relevant and as is obvious with signposting, which essentially refers to indicating which channel is being publicised by the broadcast content that follows (or is between two opening sequences), although it is also used for other, such as self-promotion (23.8%). Morphing employs increasingly sophisticated ways to partially transform the channel logo to that of the product being advertised, and is shared across the TV spot (39.5%), signposting (30.7%) and self-promotion (29.8%) genres. Multi-screens are associated with TV spots (95.5%), as they mainly involve the unequal division of the screen between the programme content (which continues uninterrupted) and the

advert. Overprinting is almost entirely linked to self-promotion (98.7%), just as credit sequences are to signposting (92.2%).

4.5 The self-promotion phenomenon

Self-promotion has proven to be one of the dominant publicity genres for broadcasting advertising content during transmission of infotainment programmes in Spain. For this reason, we have investigated the various types of self-promotion found in the sample, according to the products advertised. To this end, we have started by using the classifications proposed by the Promax⁵ Spanish Self-Promotion Festival (2011) where self-promotions differ according to their creativity, production quality and results. The typology resulting from this system of

Table 12. Breakdown of self-promotion by product promoted

Type of self-promotion	Frequency	Percentage
Infotainment programme promos	445	4.6%
Brand / corporate image promos	62	5.8%
Sports promos	65	6.1%
Drama / serial promos	493	46.1%
Total	1,070	100.0%

Source: Authors with data from project CSO2012-39232.

classification can be summarised by the following categories: brand promos, sports, themes, events, films, series, reality or informative documentaries (Pérez 2014).

In general, self-promotions made during infotainment broadcasts are promoted more or less equally with other programs belonging to the same macro-genre and drama serials (see Table 12). Sports programmes are promoted to a much lesser extent, or in simpler cases it is just the proprietary brand or corporate image of the channel or station that is advertised.

5. Conclusions

The principal objective of this investigation was to perform an in-depth study of how broadcasters and advertisers insert advertising into infotainment programmes on Spanish general-purpose channels. The results have exposed various insights into television advertising with regard to reality TV. Indeed, the results show a scenario where we have two public channels with no commercial advertising, a regional channel employing more conservative advertising practices during infotainment broadcasts, and some private channels that not only feature the most infotainment, but also base their strategies on improved innovation in the advertising insertion field during broadcasts.

One of the main conclusions is with reference to advertising saturation. Accordingly, we can observe a relationship between airtime devoted to programming and airtime devoted to publicity, where publicity exceeds content. This extreme, which seems incredible, is due to the phenomenon of concealed publicity, meaning a type of advert insertion which allows the advert and the programme to be on-screen at the same time. Ultimately, advert broadcasting time has increased, even exceeding the broadcast times of programmes with no advertising, thanks to the fact that it can be done in this synchronous form. This undoubtedly proves itself to be one of the greatest phenomena emerging from the new advert insertion methods used on general-purpose television. Broadcasters and advertisers, in their quest to retain audiences during advertising broadcasts, are opting for various methods which, ultimately, fall more or less within the bounds of current legislation.

The forms adopted by this concealed advertising are, for the most part, overprinting and multi-screens. The first of these is used mainly for self-promotion, and in the case of the second, the advertisers 'gate-crash' the programmes and insert the advertisement without hindering the display of the programme

content. These advert insertion practises, which, it could be said, are more intrusive, have caused the self-promotion advertising genre to take on great prominence in broadcasts of infotainment programmes on Spanish TV, overtaking standard TV spot adverts.

Private channels tend to use similar publicity strategies to each other, due to the majority use of self-promotion, closely followed by TV spots. In an increasingly competitive climate, promotion of proprietary programmes of channel brand images is becoming absolutely vital. This has been clearly understood by Spanish broadcasters, who transmit large quantities of self-referential messages. Furthermore, self-promotion mainly takes the form of overprinting, meaning that the phenomenon of concealed advertising, together with large doses of self-promotion, is feeding back on itself, ultimately resulting in a highly intrusive consumer experience, but what has still not been properly assessed is how exactly it affects reception.

State public channels definitely share a tendency to use self-promotion, while independent public channels bank on a wider range of genres, albeit concentrating highly on traditional methods such as TV spots inserted into classic blocks.

Ultimately, the study reveals that experimentation with different forms of advert insertion in Spanish infotainment programmes is taking place and, although in some cases the incidence of these forms is not very high, the fact that even a minimal percentage exists demonstrates an increased diversity of televisual advertising formats. The inherent nature of reality TV programmes, especially those belonging to the more dynamic genres such as reality games or the various types of documentary frameworks, offers broadcasters and advertisers an optimal scenario to try out new forms of advertising insertion.

Notes

1. *EUROMONITOR* is a permanent European television observatory created by a group of European researchers (Paolo Baldi, Ian Connel, Claus Dieter Rath and Emili Prado) with the support of the VQPT department at RAI and active since 1989. Up until 1995, its base of operations was in Ginebra, and then as of that date, it moved to the Universitat Autònoma de Barcelona, where it operates under the direction of Emili Prado, the Professor of Audiovisual Communication and Advertising. The headquarters team also includes, as national report coordinators, professors Matilde Delgado, Núria García-Muñoz, Gemma Larrègola and Belén Monclús.

2. Although after eleven series the ratings of this reality TV contest are starting to decline, and it currently shares the distinction of being the most expensive programme with the sports programme *Sunday Football*, it continues to be an advertising giant for North American advertisers (Steinberg 2011).
3. For a detailed review of the most relevant searches with regard to the Factual Entertainment and Reality TV in the last decade, see Beck, and Hellmueller Aeschbacher (2012).
4. It should be pointed out that Kaplan also refers to other reality TV shows such as *Extreme Makeover: Home edition*, *Big Brother* or *Fear Factor*.
5. Promax (2011): <http://promaxbda.org>

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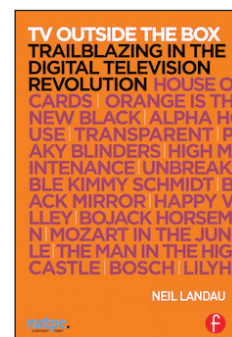
Critical Book Reviews

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Television that isn't watched on the TV

Neil Landau has worked as a producer and screenwriter for series such as *Melrose Place* (Fox), *The Magnificent Seven* (CBS) and *The Secret World of Alex Mack* (Nickelodeon). He's also been involved in animated feature films including *Tad, the lost explorer* and *Capture the Flag*. But his relationship with the media industry does not end there as he's acted as a script consultant for several companies such as Sony Pictures and Warner Bros and is also responsible for the narrative television programme in the *Film, Television and Digital Media* department at UCLA.

Landau's track record is important for us to appreciate the content of his fourth book, *TV Outside the Box. Trailblazing in the Digital Television Revolution* (2016). In this work the author explores the new universe of the OTT (over-the-top) networks emerging in the United States that are transforming the traditional audiovisual model. He analyses their business model, who is behind them and how, thanks to technology, they are altering the way audiovisual content is consumed and created.

Landau bases his study on more than fifty interviews with producers, screenwriters, business people and those responsible for the "new television" that is being reinvented by the minute and which even algorithms don't dare to predict. These conversations are too extensive and, given Landau's background, would benefit from at least some story development to guide the reader, as well as a more educational and less entrepreneurial style. In fact, the style of writing isn't academic and is aimed at media experts with some prior knowledge of the audiovisual sector.

The book is divided into three sections. In the first, *The New Disruptors*, chapter 1, *Gamechangers* focuses on the "revolutionaries" of change. Landau therefore starts his book with the heads of networks that distribute their content via the internet such as Netflix, Amazon Studios, Hulu, Sony Crackle, CW Seed, Pivot, SEESO, AwesomenessTV and Greek & Sundry;

networks to which Landau also adds YouTube, Vimeo and Vice TV.

To explore the new era of audiovisual entertainment without getting lost, in chapter 2, *New Business Models and Platforms*, Landau offers a glossary of digital vocabulary and clarifies various acronyms such as CDN (Content Distribution Network), AVOD (Advertising-supported Video On Demand) and SVOD (Subscription-supported Video On Demand).

In chapter 3, *Comparing the Brands*, Landau looks deeper into the history of the media industry in the United States, from the start of television (ABC, CBS, NBC and then Fox) to the wide range of media platforms that appeared with the emergence of the internet. In spite of their apparent diversity, Landau claims that "network gatekeepers still control distribution and content" (p. 126). And not only that; he also warns of the huge power held by internet distributors, genuine monopolies. This is a very useful chapter for teachers and those interested in the structure of the media, with illustrations that help to understand the developments in the media ecosystem and how large conglomerates are reacting to the bold proposals on the internet.

In the second section of the book, *Trailblazing Content Creators*, Landau shares with his readers the keys to success of content that has broken the rules of the game, such as the new subscriber-based business models that have liberated series from interruptions by advertising and the pursuit of large audiences, resulting in trailblazing content as explained in chapter 4, *Niche Is the New Mainstream*. Here he details how ground-breaking series on Amazon (*Alpha House*, *Transparent*, *Mozart in the Jungle*) and on Netflix (*House of Cards*, *Orange is the New Black*, *Unbreakable Kimmy Schmidt* and *Peaky Blinders*) have forged new paths in audiovisual narrative. These series have transcended certain conventions, have brought more diversity and authenticity to characters and storylines, as well as breaking with stereotypes and going beyond the politically correct in both language and plot (chapter 5, *Breaking Down Barriers*).

This boom in creativity has also altered the customary genres, as explained in chapter 6, *A New Spin on Established Genres*. Series such as *True Detective*, *Luther*, *Bosch*, *Black Mirror*, etc, and also adult animation, which has flourished in a more revolutionary way (chapter 7, *The Next Iteration of Adult Animation*) as well as talk shows (chapter 10, *Talk is Cheap*) and music and cooking programmes (chapter 11, *Beyond MTV, Food as Art, Digital Magazines*). Even webisodes (chapter 9) have helped to develop a different kind of advertising that tells stories. Another of the issues mentioned by Landau is the opportunity provided by OTT networks to cancel series early (chapter 8, *Life After Broadcast*) and the importance of fans throughout the entire process.

In the third part of the book, *(R)evolution*, Landau doesn't forget that technology has altered the cinematographic model (chapter 12, *The impact of Digital Television on Cinema*), providing the example of Marvel comics and how these have explored the new media. In the last chapter, *Emerging voices in the Digital Realm (and beyond)*, Landau interviews David Anaxagoras (a former student) and Zander Lehmann, both creators and executive producers, with the aim of offering inspiring models to spur on future generations.

In his book's conclusion, Landau puts forward the pros and cons of this new television whose content is available on the internet and reveals how, in spite of resistance by some, we can no longer renounce today's mode of audiovisual consumption. To complete his analysis and give it credibility, Landau mentions piracy: "a virus that infects all media" (p. 418). Although he admits that no-one has been able to find a viable antidote, he proposes models that make it worth paying for the audiovisual experience received: high definition content at an affordable price (p. 418).

This book is thought-provoking for academics, students, professionals and media directors. It's worth reading because it shows what's happening in a pioneering country in media terms, namely the United States, and makes predictions that, albeit with many differences, could be adapted to other markets. As a major feature, of note is the business focus, key in North America: content is created that helps to sustain the industry financially and, to do so, Landau seems to have forgotten one important player: the audience, which surely warrants a chapter in his book.

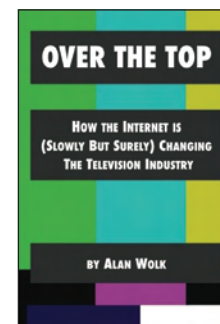
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BY ELENA NEIRA

Author of *La otra pantalla*



The changeable situation television is going through and the impact of the internet on it has infused a lot of books with a sense of fatalism, predicting its imminent death. The publication of *Over the top. How the Internet is (slowly but surely) changing the television industry* (2015) undoubtedly coincides with a period of extreme disruption. Its author, Alan Wolk, an analyst specialising in the new television, Professor at Rutgers University for a year and with an important career in advertising, tackles the key aspects of this new scenario. He does so with a clear aim: to offer a complete picture so as not to descend into a superficial, simplistic view. Hence his focus on professionals in the industry with certain basic knowledge and a deliberately across the board approach. The result is a vital piece of research into the *status quo* of the TV industry, its main agents of change and the trends that can be glimpsed on the horizon.

The word that best describes television's current situation is transition. The new OTT model (with content distributed online) has no witnesses but has inflicted considerable damage on traditional television. As Wolk himself says, "change happens gradually, and then all at once". TV is still immersed in the first stage of this process. The accelerator in the crisis of traditional TV consumption and business is no other than the internet and the freedom it has given viewers. This argument is the gateway that allows the author to introduce the much-debated concept of audience fragmentation. Viewers are no longer limited to the programming grid; content can be viewed without the imposition of timetables, on different devices and in different locations. This new situation is threatening the traditional system based on the commercial profitability of space (according to its audience) and costly pay-TV packages (with a rigid supply). In fact, Wolk believes the key lies in being able to measure real connected consumption. A large part of the lack of determination and transparency in this area is down to the first screen's fear of losing its supremacy in terms of profitability simply because there's still no economically viable alternative.

If one thing is clear after reading this manual it's that the traditional concept of television is not mutating due to any single

isolated agent. It's a full-blown perfect storm: the combined effect of content digitalisation, technological development and new habits of the average viewer which have totally upset the apple cart. Television, as I've already mentioned, is undergoing a transformation that is not yet complete. The traditional business model, protected by an intricate network of rights, economic interests and a certain amount of inertia, exists side by side with a search for a new sustainable business model. How have we arrived at this situation? Wolk devotes the second chapter to breaking down the different drivers of change. He even assigns them a rating for their "disruption potential" according to the impact they've had on the traditional TV industry and consumption. At the head he places the aforementioned **time-shifted viewing** (watching programmes outside the schedules set by the grid), a practice which, in recent years, has gained fans with the consequent slowdown in live audiences and, by extension, a "depreciation" in the conventional audience which, to date, had set the advertising price for space. We have therefore gone from a concept of *household television* to *individual television*. Various factors have influenced this rise in time-shifted viewing. For example, the gradual spread of **VOD** (video on demand), especially the TV on demand services of conventional networks. Also the proliferation of **set-top boxes** (the new generation of devices that connect any device to extensive OTT content, such as AppleTV and Google Chromecast) and the improvement and widespread use of **smartphones** which, for younger audiences, have become the main viewing screen. The new **streaming platforms** (such as the very famous Netflix), in addition to fostering time-shifted viewing, have also led to the definitive triumph of accessibility, consumption on the move, cross-platform adaptability and the abandonment of expensive subscriber packages (**cord-cutting**) in favour, precisely, of internet TV services or light bundles at more affordable prices and with a better user experience. This has also encouraged a new culture of **binge viewing** where traditional products designed for consumption in a series are watched as "marathons" lasting several hours at a time.

The new TV has also entailed an increase in the influence of the individual on content. Social television (active involvement in social media at the same time as watching TV content) is another key transforming element that offers an infinity of possibilities in terms of audience interaction (crucial to retain audiences), user feedback (which can better inform production decisions) and targeted advertising (based on user preferences).

Fan communities are also crucial, with the potential to establish a direct relationship with audiences, acting as powerful generators of content and sources of audiovisual discovery; many people are already talking of the global niche. Wolk also devotes a special section to **data and metadata** as a disruptive element: tonnes of data, generated through consumption via connected devices. Monitoring the habits of viewers and taking informed decisions related to these is, today, one of the main drivers of innovation in terms of user experience and content.

Wolk saves the last chapter for his predictions regarding the future of television. He believes the clearest trend is **TV Everywhere**: seeing what you want, at any time and on any device with a totally personalised experience. This phenomenon will pose interesting challenges such as measuring consumption completely and more effectively targeted advertising; and also opportunities, as this kind of viewing is more active with a more direct attention threshold. He also predicts **specialisation of the second screen**. Its integration within the TV ecosystem and better audience segmentation could be one of the great assets to improve the medium's advertising potential. Wolk believes that TV is also bound to embrace the concept of **BYOD** (bring your own device); in other words, the multiplication of content access points instead of the traditional limitation to a certain provider and device, resulting in the monumental task of developing appropriate applications for each device and operating system. The new TV is likely to result in **better recommendations and discovery** to "connect" (increasingly more abundant) content with users. The author predicts **new business and profit models**, such as targeted advertising, premium services without advertising, supply based on subscription, branded content and branded promotions. The future, concludes Wolk, augurs the **data empire**. Measuring, processing and taking informed decisions will form the basis of better TV services and better experiences. A more individual TV, more diverse, more available and more compulsive.

Over the top. How the Internet is (slowly but surely) changing the television industry (2015) is an instructive book, easy to read and enjoyable, albeit with too much casuistry when documenting some of the phenomena. In spite of its local approach brimming with examples and references to the US, it does not become merely anecdotal. Wolk has managed to identify players, disruptive elements and trends in new television and position them within a theoretical framework applicable to any region. This is his great contribution to professional and academic debate and it undoubtedly represents the most comprehensive work on the current TV ecosystem published to date.

NEIRA, E. *La otra pantalla: redes sociales, móviles y la nueva televisión.*

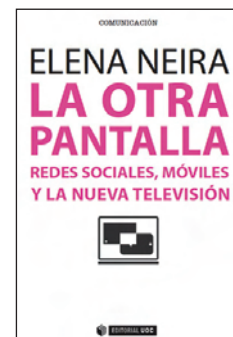
Barcelona: Editorial UOC, 2015. 152 p.

ISBN: 9786079046026

By JESSICA IZQUIERDO CASTILLO

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Social television: an introductory overview to contemporary television

The internal and external logic of television is currently undergoing a reconversion and redefinition. Some of the fundamental factors determining the present and future of TV are: the internet's consolidation as an audiovisual medium, the digital paradigms of interpersonal communication, the incipient maturity of digitally native audiences and their consumption habits and the progressive micro-segmentation of publics. Consequently, after three decades of media hegemony, television is now facing the need to transform as a medium and consolidate new relational patterns with its audiences.

Elena Neira's book, *La otra pantalla. Redes sociales, móviles y la nueva televisión* [The other screen. Social networks, mobiles and the new television] attempts to define television within a digital communicative context characterised by socialisation via social media and mobility. Neira has worked in various media in the area of market research and marketing, specialising in social media and technology applied to communication. She lectures at university on subjects such as audiovisual distribution and marketing, promotion and advertising.

In this book, over seven chapters the author explains some of the fundamental concepts that influence the formation of this new television, framed within the phenomenon of the consolidation of social media associated with the consumption of TV content.

The first chapter presents multi-screen TV; i.e. discontinuous consumption, removed from the traditional paradigms of one-directional programming and aimed at increasingly digital consumers. The emergence of such new consumers requires new methods to measure audiences, representing a significant challenge for the current development of television.

The second chapter looks at this challenge and presents Big Data as one of the main supports for observing the behaviour of audiences throughout each stage in creating TV content. In this respect the Big Data concept has become one of the

most interesting phenomena for the study of digital media since the use of data generated by internet users via their behaviour (social media, consumption, searches, purchases, downloads, etc.) has become a fundamental tool for creating and promoting informative and audiovisual content.

In its third chapter this book examines the new social facet of television with a brief presentation of Social TV and the use of apps as services additional to broadcasting. At this point the author wonders about the effects of TV's digital sociability for advertising with the aim of developing, in the following chapters, the implications for social media and television.

Chapter four analyses social media as an instrument to generate conversation with and between audiences and combines traditional concepts with newer ones, such as an analysis of the arcs of influence in social media, whereas chapter five looks at the usefulness of social media in promoting TV content and proposes a route map for TV networks to start integrating social media within their media and communication practices. This chapter ends with a comparison of social TV in the grid programming model and the over-the-top (OTT) model.

The last chapters look more closely at the benefits of appropriately using social media to help television grow. The sixth chapter highlights issues such as engagement and the benefits of content going viral, also proposing strategies to encourage audience interaction and to get a positive response. Chapter seven is devoted to measuring audiences in this social, interactive context where the concept of a single audience that was so much a part of analogue TV is called into question. Here the author proposes different areas of analysis related to audiences and their behaviour regarding content via social media.

In short, this book is a brief introductory manual to the phenomenon of social TV. Easy to read, it offers basic definitions of concepts we need in order to understand today's television, such as the second screen, social TV and social advertising. For this reason it is useful as complementary material for students starting their television studies, as well as for the public at large

interested in finding out more about the phenomena behind television's behaviour today. Another of its major contributions is as a guide, with recommendations for the use of social media by TV networks, which could be useful for communication professionals, especially those working in audiovisuals and advertising.

On the other hand, for a deeper look at the complexity of the phenomenon of today's television, other analytical and exhaustive studies are recommended such as the book by Professor José María Álvarez Monzoncillo, now a reference work in the study of the area, entitled *La televisión etiquetada: nuevas audiencias, nuevos negocios* (Madrid: Ariel, 2011). In the area of measuring social TV audiences, also recommended is the book by Mike Proulx and Stacey Shepatin: *Social TV: How Marketers Can Reach and Engage Audiences by Connecting Television to the Web, Social Media and Mobile* (New Jersey: John Wiley & Sons, Inc., 2012), which has been used as a reference for this area by the author of this book. Among the most recent works, of note is the one by Michael Strangelove, *Post-TV Piracy, Cord-Cutting and the Future of Television* (Toronto: University of Toronto, 2015) which analyses the habits and values of audiences in the post-television era.

In summary, this publication provides an introduction to a highly complex phenomenon, namely television in the converging context and its relationship with digital audiences and new forms of social consumption. Descriptive in nature, this book presents the fundamental concepts that define today's TV and help to construct the logic of television within a digital media system.

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PROULX, M.; SHEPATIN, S. *Social TV: How Marketers Can Reach and Engage*. New Jersey: John Wiley & Sons, Inc., 2012.

STRANGELOVE, M. *Post-TV Piracy, Cord-Cutting and the Future of Television*. Toronto: University of Toronto, 2015.

Books Review

LAMELO, C.

Televisión social y transmedia: nuevos paradigmas de producción y consumo televisivo

Barcelona: Editorial UOC, 2016, 206 pages.

ISBN 9788491163657



This book explains how the digital era has led to viewers changing their TV consumption habits and their relationship with content. Growth in the “fan phenomenon” and the strength of social media have transformed viewers into active agents with increasing control over what and when they want to consume. As a result, the media are becoming content-generating

platforms in order to adapt to this new demand.

The author analyses the current situation of television and the signs of a change in model that will affect the medium's future, especially regarding how content is created and consumed. He believes it's necessary to mark out this paradigmatic change in journalistic and communication companies, revealing some of the strategies used by content generators to enhance transmedia television narrative and its interaction with social media and the digital environment.

According to Lamelo, the role played by digital journalism in this new reality should be one of a strong commitment to quality and citizens, and to improving the working conditions of informers. We need to pay attention to what users want and their opinions, but we must also be able to differentiate between news that is interesting or relevant and anecdotal curiosities. It's not a question of demonising the latter but it's fundamental to know how to distinguish between the two and clarify positions so that citizens can decide what to consume and to what extent; only in this way can professionals gain the trust of their users. In the author's own words “Everything seems new but the profession remains the same”.

MEDINA, M. (coord.)

La audiencia en la era digital

Madrid: Editorial Fragua, 2016, 216 pages.

ISBN: 978-84-7074-670-3



This book contains work by different lecturers from the Universidad de Navarra based on surveys carried out in 2008 and 2012, reflecting on TV consumption, viewers' habits and the Spanish population's degree of satisfaction with TV content. It's divided into nine chapters describing the evolution of the media in Spain and the impact caused both by technological innovations and also by modifications in the legal framework.

Although these surveys are relatively dated, the work examines various points of view that can still be considered relevant today.

The first chapter analyses the strategies of the large communication groups to tackle the challenges of digitalisation, while the next chapter describes the growth in the number and variety of information products and services on offer, both free and paid, comparing the quality and players in the audiovisual sector.

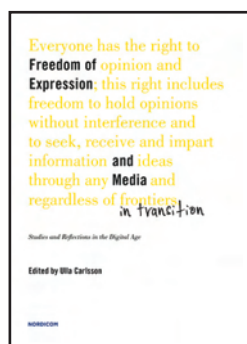
While the third chapter focuses on the behaviour of TV audiences (profile, consumption times, preferred genres, etc.), the fourth is devoted to the content offered by pay-TV and the business strategies that providers need to implement to be able to survive in a world where free access is the order of the day. The fifth chapter analyses user behaviour with regard to advertising, according to socio-demographic characteristics, while the sixth tackles the trend towards multi-screen consumption to interact with audiovisual content, analysing what kind of devices audiences prefer and the difficulties encountered by TV groups in quantifying the attention paid by audiences to their content. The seventh chapter studies the multi-platform strategy of networked TV among Spanish operators while the last two chapters leave television to one side and analyse the effect and influence of the digital revolution on the paradigmatic change in the film industry and printed media.

CARLSSON, U. (ed.)

Freedom of expression and media transition. Studies and reflections in the digital age

Goteborg , Sweden: Nordicom, 2016, 196 pages.

ISBN: 9789187957222



Nordicom presents this book that focuses on four big issues in the digital era: transformations in the media model, changes to free speech and the public sphere, threats to freedom of the press and war reporting.

Two articles make up the first section, entitled “*Rethinking the Nordic Media model: a challenge to democracy*”. Based on an analysis of

the Norwegian media model, the first article argues that the welfare state also depends on the organisation of the media, while the second article focuses on the need of Public Service Media (PSM) to rethink their framework of legitimacy and incorporate digital media within communication rights.

“*In transition: freedom of expression, media and the public sphere*” is the title of the second chapter in this book. Eight contributions discuss whether the public sphere can guarantee free speech and freedom of the press, how pluralism affects the role played by new communication technologies and the challenge of complying, or not, with ethical rules in such an environment.

The third section, “*Threats to freedom of the press: control, surveillance and censorship*”, introduces the idea of a new kind of reporting: drone journalism, where instead of sending a reporter into danger zones a drone is sent to record images. The section also discusses how dictatorships attempt to silence journalists and how the internet is used to weaken this kind of government. Specific cases are presented of countries where journalists have been persecuted, imprisoned and murdered.

Under the title “*Reporting war and conflict: safety and civil rights*”, the texts analyse how international and human rights are violated in international conflicts and how journalists become targets for silencing.

Available at:

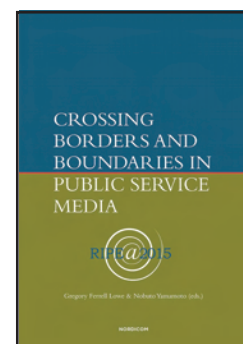
<http://www.nordicom.gu.se/sites/default/files/publikationer-hela-pdf/freedom_of_expression_and_media.pdf>

FERRELL LOWE, G.; YAMAMOTO, N.

Crossing borders and boundaries in public service media: RIPE@2015

Goteborg, Sweden: Nordicom, 2016, 251 pages.

ISBN 9789187957215



This book contains the studies discussed during the Conference *RIPE@2014: Public Service Media Across Boundaries* that took place in Tokyo. The book is divided into three sections: *Section 1. Broadcasting & networked Communication*; *Section 2. The State, the market & civil society*, and *Section 3. Crossing institutional & operational boundaries*.

The articles in the first section deal with universal access to the media on the internet and the importance of guaranteeing its neutrality. They also highlight the need to take advantage of public service media in current networks, characterised by competitive cooperation. The second section focuses more on presenting case studies and projects carried out on the PSM of various countries. The last section, in some instances based on practical examples, discusses *res publica* as a narrative to legitimise public service media in the digital era and PSM as a citizen alternative in an environment of increasingly commercialised information. It studies search facilities and the need to label content as much as possible in order to personalise, recommend and encourage proactive consumption. It also reflects on copyright issues in transborder markets and the difficulty of creating/applying common regulations. To end, the book emphasises the vital importance of crossing boundaries to achieve innovation in content development for PSM.

The next RIPE conference, to be held in Belgium in September, will focus on public service media in a networked society.

Available at:

<http://www.nordicom.gu.se/sites/default/files/publikationer-hela-pdf/crossing_borders_and_boundaries_in_public_service_media.pdf>

GARCÍA SANTAMARÍA, J. V.

Los grupos multimedia españoles. Análisis y estrategias

Barcelona: Editorial UOC, 2016, 393 pages.

ISBN: 9788490644911



The aim of this book, divided into two parts, is to examine the formation of the major Spanish multimedia groups and their development, as well as analysing their strategies and their impact on the country's media system.

In the first part, the author presents the state of the media industry then looks at the market situation for film, press, radio and television

and the fundamental characteristics that differentiate Spain's communication groups. There's also an analysis of the vertical and horizontal integration processes and the phenomenon of TV market concentration (made up of the duopoly of Mediaset España and Atresmedia) and its potential effect on pluralism.

The second part of the book tackles the evolution of Spain's media system from the 1980s up to the present day, afterwards analysing in depth (history, strategies, financial situation, etc.) Spain's principle multimedia groups: Prisa, Planeta, Telefónica, Vocento, Unidad Editorial, Mediaset España, Mediapro, Godó and Zeta.

The author ends the book with a discussion of the future trends for the media and the need for telecom companies and communication groups to create strategic alliances if they are to survive, considering that the new internet players will also compete in this market and grow in strength.

BUITRAGO, A.; NAVARRO, E.; GARCÍA MATILLA, A. (eds.)

La educación mediática y los profesionales de la comunicación

Barcelona: Editorial Gedisa, 2015, 158 pages.

ISBN: 978-84-16572-02-1



The eight articles in this collection are based on comments made by 120 professionals interviewed by 16 researchers from different universities as part of the sub-project entitled "Communication professionals and competition in audiovisual communication in a digital environment", carried out by the Universidad de Navarra.

The first few articles provide an introduction to the origins of the term "media education", as well as other concepts such as "citizen journalism", "brand journalism", who or what "influencers" are, etc. In these texts, the professionals themselves criticise their training, claiming there's a need for media literacy to be included within compulsory education in order to break down the digital divide. They also discuss, from their own perspective, whether the population is literate enough. Chapter 5 carries out a critical analysis of how researchers into communication education have not sufficiently evaluated the relative influence of advertising in media education. The main weight of this book falls on chapter 6, which criticises the obsolete nature of certain forms of communication, highlighting the difficulties encountered by some professionals in adapting to these new environments and stating the need to update and train. New types of journalism in a more participative environment are also examined, as well as the problems of maintaining a shared code of ethics. The seventh section discusses the digital divide and the lack of support encountered by professionals in the educational system and the lack of interest among the political classes regarding this area. It also discusses the wide range of opportunities offered by today's technological advances. The publication ends with an analysis of the need to renew approaches to teaching and solve the errors committed in teaching communication studies in faculties.

Journals Review

Communication & Society

Universidad de Navarra. Faculty of Communication
Vol. 29 (3) June 2016
ISSN: 0214-0039 E-ISSN: 2386-7876 [online]

Observatorio (OBS*)

Lisbon: OberCom - Observatório da Comunicação
Vol 10, Issue 2 (2016)
ISSN: 1646-5954

COMMUNICATION & SOCIETY

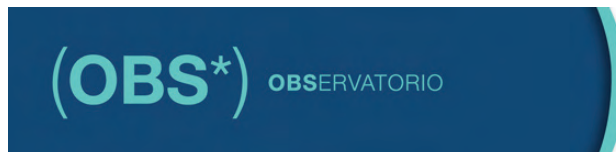
This academic journal by the Universidad de Navarra publishes research into communication in a range of social spheres. Four of the articles focus on television: Charo Lacalle and Beatriz Gómez analyse how women are represented in the family context in Spanish TV fiction while María Verónica de Haro de San Mateo discusses bullfights as mass entertainment on television during the time of Franco, and Martin Elena analyses and compares the positioning of international media such as CNN and Al-Jazeera with regard to social movements, focusing on how the so-called *Arab Spring* was covered. Concepción Fernández Villanueva examines the emotional involvement or distancing of TV news viewers with regard to images of violence or suffering of others, while a fifth article, by Professor Idoia Astigarraga Agirre covers the field of television and video on demand, in this case not looking at content but rather young audiences and how they interact with the medium as a result of the new digital environment.

José Manuel Sánchez Duarte and Guillermo López-García study communication via social media, both doing so related to political activism. The first analyses the internet as a place for political militancy while the second looks at leaders on Twitter during the Spanish general election campaign in 2015, from a quantitative point of view but also in terms of the message.

Oumar Kane, from the University of Quebec, presents a critique of communication studies and their necessarily interdisciplinary nature.

Available at:

<<http://www.unav.es/fcom/communication-society/en/>>



Some of the articles in OBS* also focus on the activity of political parties and their candidates on social media. For example, José Rúas-Araújo, Iván Puentes-Rivera and María Isabel Míguez-González analyse the predictive ability of Twitter and its impact on the election for the Galician parliament. Inês Amaral, Rocío Zamora, María del Mar Grandío and José Manuel Noguera compare Portugal and Spain in terms of flows of communication and influence on Twitter on the 2014 European elections. Continuing in the area of social media but moving away from politics, Marina Ramos-Serrano and Àngels Martínez-García discuss bloggers and instagrammers and analyse the subjects and visual composition used by some of the most influential online opinion leaders in the world.

For his part, Josep Àngel Guimerà explains the reformulation of the model of proximity TV within the context of the economic crisis in Catalonia between 2008 and 2014, as from the change in public communication policies after the switchover to DTT, with a particularly strong impact on local TV, historically the weakest broadcasters.

Looking at both areas of study, namely television and social media, Manuel García Torre, José Juan Videla Rodríguez and María Josefa Formoso Barro analyse the content on offer that is distributed via tablets and mobile devices by the Spanish TV groups of TVE, Mediaset and Atresmedia, as well as the interactivity maintained with their followers thanks to these devices.

Available at:

<<http://obs.obercom.pt/index.php/obs/issue/view/50>>

Comunicació. Revista de Recerca i d'Anàlisi

Barcelona: Institut d'Estudis Catalans

Vol. 33, issue. 1 (May 2016)

ISSN (print): 2014-0304 / ISSN (online): 2014-0444



This journal by the IEC presents an assortment of subjects related to communication, ranging from a pure TV focus to think tanks for political parties, animation feature films, correspondents and the spiral of silence, among others.

Teresa Martínez Figuerola, Xavier Cubeles and Maria Pagès present the findings of research into the origin and evolution of the animation

film industry during the post-war period in Catalonia, years in which Barcelona became a leading reference in this field in spite of the adverse context.

Francesc Ponsa Herrera looks at the influence of the internal think tanks of Catalan political parties through their media presence. Unlike other countries, in Catalonia there is little visibility for foundations related to political parties.

The use of Twitter, Facebook and YouTube as a source of information is growing. In one of the articles in this issue of *Comunicació*, Martín Elena and Mariona Gómez Nadal investigate how they are used and how foreign correspondents verify information online.

Felipe Alonso-Marcos writes on the impact of the conceptualisation of the “desire to express opinion in public” in research into the spiral of silence (1990-2010), resulting from his doctoral thesis based on the theory by the German sociologist Noelle-Neumann.

Available at:

<<http://revistes.iec.cat/index.php/TC/issue/view/9381/showToc>>

Radio, Sound & Society Journal

ECREA Radio Research Section

Vol. 1, issue 1. June 2016



This is the first issue of the journal by the ECREA (*European Communication Research and Education Association*) on radio and sound and the publication will include scientific contributions on radio in the web environment and audio media in areas such as history, business model, technology, advertising, sound art and public service broadcasting, among other areas.

Issue one is devoted to Latin radio and provides a selection of articles by authors from Latin American countries. Miguel Midões from the Universidade de Coimbra in Portugal talks about community radios in the Portuguese-speaking space and suggests they can be used to empower communities. Also in the area of community media, Isabel Lema Blanco and Miriam Meda González write about linguistic diversity and the promotion of minority languages within a context of globalisation. Bruno H. B. Rebouças and Elaine Nogueira Dias suggest we should rethink the model of media regulation in Brazil and, more specifically, the policy of granting radio licences to ensure pluralism and the social function of radio. And there are two more articles focusing on Brazil: one deals with the country's public radio broadcasting service and the case of EBC, written by Carlos Eduardo Esch and Nelía R. del Bianco from the Universidade de Brasília, while the other looks at Brazilian soap operas on the radio produced as from the 1940s and their influence on the soap operas produced subsequently for television, written by Eduardo Vicente and Rosana Soares from the Universidade de São Paulo.

Manuel Martínez Martín from the Universidad Carlos III in Madrid presents an article resulting from his doctoral thesis studying the evolution of direct participation by listeners of Radio Nacional de España between 2004 and 2014, coinciding with the birth and consolidation of social media platforms such as Facebook and Twitter.

Available at:

<<http://ecrea-radioresearch.eu/rss-journal/index.php/rssj>>

TELOS. Revista de Pensamiento sobre Comunicación, Tecnología y Sociedad.

Madrid: Fundación Telefónica
Núm. 103. Febrer-maig 2016
ISSN: 0213-084X



The journal by the Fundación Telefónica has devoted this issue to creative technological environments. The guest writers on this occasion are, on the one hand, Carlos A. Scolari from the Universitat Pompeu Fabra who reflects on the trans-media phenomenon, informal learning strategies and media skills in the new ecol-

ogy of communication and, on the other, Jean Paul Simon from the Institute for Prospective Technological Studies (IPTS) of the European Commission, who also looks at digital transformation in industry and media content.

The relationship between content and technology is also analysed by other authors such as Antonio San José with his article "Una pantalla, dos pantallas, tres pantallas..."; and Marta Saavedra and Leticia Rodríguez who examines the social audience and the strategies of networks and publicists in this new environment; and also Alberto Pacheco, who analyses changes in access to knowledge and training in an individualised and active communication context.

Juan Miguel Aguado also looks at this digitalised environment but from the perspective of advertising, analysing the impact of ad blockers on the digital content industry. The author examines the clash between the business model in the internet environment and the protection of users' privacy.

Available at:

<https://telos.fundaciontelefonica.com/DYC/TELOS/LTIMONMERO/seccion=1287&idioma=es_ES.do>

ZER. Revista de estudios de comunicación- Komunikazio ikasketen aldizkaria

Bilbao: Universidad del País Vasco
Vol. 21 - Issue. 40. May 2016
ISSN: 1137-1102 / e-ISSN: 1989-631X



Manuel Peris Vidal, from the Universidad Pablo de Olavide in Seville, analyses how the media cover male-based violence and the media's failure to relate this to the social and ideological discrimination suffered by women, something which would be of great pedagogical value according to the author.

The representation of photo-journalists in film is another of the issues covered by this journal. Olga Osorio, from the Universidade da Coruña, analyses 107 films appearing in Spain between 1928 and 2000 and obtains a profile of the photo-journalists appearing in them. Also dealing with Spanish cinema, Jorge Clemente Mediavilla and Emilio C. García Fernández investigate the contribution made by websites from the film industry in the projection and perception of Spanish-produced films. And remaining with the cinema, Laura Cortés-Selva and María Mercedes Carmona-Martínez study the ethical and aesthetic conception of the British film director Mike Leigh whose work is a hybrid between fiction and documentary.

Mario García de Castro and Carmen Caffarel Serra talk about the effects of the economic crisis on the production of TV fiction in Spain in the period 2010-2015. The authors believe that the consequences of this crisis have been many and diverse, such as the ageing of the prime time audience, the predominance of the private duopoly, the lack of investment and suffocation of public television.

Other authors look at social media as a source of news, communication management in NGOs in a crisis context and language policy in the media.

Available at:

<<http://www.ehu.eus/zer/>>

Comunicar. Revista científica de comunicación y educación

Huelva: Universidad de Huelva
Issue. 48, vol. XXIV, 3er quarter, July 2016
ISSN: 1134-3478 E-ISSN: 1988-3293



Comunicar has devoted the dossier in this issue to ethics and plagiarism in scientific communication in an era when the use of information and communication technologies can encourage certain dishonest practices. The first three articles look at specific cases in Germany, Latin America and China. The fourth, by María Gómez-Espinosa from the Universidad Internacional

de La Rioja, and Francisco Moreno-Ger from the Universidad Complutense in Madrid, looks at plagiarism and internet use in higher education and concludes that this can be reduced by more creative and participative activities. A fifth article by Juliana Duarte-Hueros, Ana Duarte-Hueros and Soledad Ruano-López also looks at the community of university students but analyses the downloads of audiovisual content carried out by this group and their stance on illegal downloading.

Other articles, appearing in the kaleidoscope section, deal with cyber-bullying; how teenagers present themselves on Facebook and young people and the third sector of media in Spain. The issue also includes two more texts focusing on the work of university students. On the one hand, there is an analysis of internet use and its relationship with the academic success of these students while another compares writing by hand and electronically when taking notes in the classroom.

Available at:

<<http://www.revistacomunicar.com/index.php?contenido=revista&numero=actual>>

Participations. Journal of Audience & Reception Studies

Aberystwyth [Gales]: Aberystwyth University
Vol. 13 issue. 1. May 2016
ISSN: 1749-8716



This publication looks at the analysis of audiences in different cultural sectors and various targets. Ava Laure Parsemain from the University of New South Wales (Australia) wonders, in a study, whether critical viewers learn from television or whether, on the contrary, a critical attitude prevents learning, something that may depend on the approach taken by TV viewers to the content.

Victor Wiard and David Domingo, from the Université Libre de Bruxelles (Belgium) study audience fragmentation within a context of convergence and do so based on a group of students from their university and their consumption of TV series on the internet.

Anne Kaun, Jannie Møller Hartley and Janis Juzefovičs focus on invisible audiences, those targets traditionally marginalised or not taken into consideration in studies, with their article "In search of the invisible (audiences)".

Other articles in this issue deal with the challenges posed by researching digital audiences, the methodological challenge of online audience research and the loss of power among these audiences.

Available at:

<<http://www.participations.org/Volume%2013/Issue%201/contents.htm>>

Websites Review

International Telecommunication Union (ITU) **[ICT Regulation Toolkit. Regulating “Over-the-top” Services](#)**

The ITU is the United Nations agency responsible for governing telecommunications. Its member states take executive decisions in areas such as the allocation of the global radio spectrum. One particular feature of this specialist UN agency is its openness and accessibility for non-state parties, such as technology firms which enjoy considerable presence and influence in furthering the organisation's debates.

The ITU has developed a specific website of regulation tools with a section devoted to over-the-top (OTT) services. In general, “OTT” is the service provided by an ICT provider which does not own a distribution network or rents capacity to use one; OTT players use the networks of telecom service operators to reach their users. Many of the services offered are related to audiovisual communication or content and require considerable bandwidth. However, they are free or available at a lower cost than traditional distribution systems. Skype, WhatsApp, Facebook Messenger, Google Talks are all examples of OTT services. US legislation covers OTT media such as content aggregators as well as services with editorial responsibility, such as Netflix. In Catalan legislation, however, Netflix could be considered as a provider of audiovisual services subject to prior communication (articles 60 to 64 of Law 22/2005, of 29 December, on the audiovisual communication of Catalonia). Such providers are treated in a similar way in European countries such as [France](#) and [Belgium](#).

[The Rise of OTT Players - What is the appropriate response?](#)

This link is for a document presented at the ITU Jakarta Conference in 2014 providing an overview of the main characteristics of OTT players and the challenges posed for their regulation. First it states that OTT players have a strong impact on the market and are drivers of innovation and demand. But with the current business model, resulting from regulations, OTT players are taking value away from state markets. They are also taking resources away from the telecom companies operating in the area for the investment required by regulators in infrastructures. Moreover, telecom companies are subject to regulations in terms of licences and fees, service quality and universality, interconnection, consumer protection, data protection, security and legal interception, taxation, etc. OTT players, however, are exempt from all such regulations. The document concludes that these dysfunctions in market regulations require a review aimed at unified governance of the internet and its value chain.

Comisión Nacional del Mercado y la Competencia (CNMC)

[Caracterización del uso de algunos servicios over the top en España](#)

Although not a website, along the same lines as the previous entry we would like to draw attention to this document presented by the CNMC [National Market and Competition Commission] in December 2014. The regulator defines OTT services as those provided on the internet without any control or specific management by network operators. Given their newness and changing nature, a certain lack of definition is allowed for the term “OTT”, which can refer both to any demand service online and also to a sub-category of services available via specific apps or even all those services not offered by traditional operators from the communications sector.

These services can be categorised according to a range of features, such as whether they are for-profit or not-for-profit. Among the former, there are various ways of generating revenue: payment per consumption and/or by subscription, revenue from advertising and even income from selling data related to users' patterns of behaviour and characteristics. For audiovisual services there are also differences between transmission via streaming (live in real time) and downloading; while in the former users consume content as it is being downloaded, in the latter the content must first be downloaded and then consumed. Real-time broadcasting therefore requires a bandwidth that exceeds or at least equals the transfer rate required by the service. As stated by the CNMC, broadband OTT services (with similar features to the traditional services of telephony, messaging and audiovisuals offered by telecom operators) have reduced the demand for traditional services and limited the ability of the latter to generate revenue.

European Parliament

[Over-the-Top \(OTTs\) players: Market dynamics and policy challenges](#)

In December 2015 the European Parliament published this extensive study which analyses OTT business models (internet voice services, instant messaging, streamed video and music). The document ends with a series of measures to strengthen this sector in Europe, a generator of innovation, high value added and high quality employment. In this respect it recommends strengthening technology start-up policies in Europe and promoting financing systems such as venture capital. As a fundamental priority it highlights the achievement of a digital single market in Europe, the Commission's initiative to harmonise the 28 national regulations for this sector.

European Commission**[Public consultation on the evaluation and the review of the regulatory framework for electronic communications networks and services](#)**

From 11 September to 7 December 2015, the European Commission launched a public consultation to review the legal framework for electronic communications. One of the main objectives of the current European Commission is to create a genuine digital single market, designed and implemented by the *Digital Single Market Strategy*. Among the 16 actions proposed in the DSMS, of note is the implementation of a high speed broadband infrastructure throughout the continent, with the profits produced by this infrastructure acting as an incentive for telecom operators to make the required investment. However, the emergence of OTT players has now jeopardised this outcome. OTT players are new agents that use existing infrastructures to provide services directly to the consumer but without having to invest or being subject to regulations. For this reason telecom operators doubt the profitability of the commitments proposed by the European authorities if there isn't at least some balance between the obligations of all the parties involved.

Within this context of laying the foundations for the digital single market, the Commission is proposing, among other issues, the regulation of OTT services. The aforementioned consultation covers aspects such as the business model of new electronic services, consumer defence, the role of regulatory authorities and fostering European entrepreneurship in the sector.

Media Policy Project Blog. London School of Economics and Political Science (LSE)**[Digital Single Market strategy shouldn't go 'over the top' with regard to future regulation of OTT services](#)**

This LSE blog on communication policy deals with various subjects such as public service and the BBC, data and privacy protection, spectrum policy, media literacy and new issues such as the transparency of algorithms (*Algorithmic Accountability*), among others. It has contributions by experts from all over Europe. This entry describes the hypothetical desire of the European Commission to achieve a level playing field in terms of regulation for OTT players and ECS (electronic communication services). It discusses the difficulty in striking a balance between protecting consumers and the regulatory flexibility required by such a highly innovative sector. According to the expert collaborator, too much regulation could pose additional (and unnecessary) difficulties for these initiatives and start-ups.

Telecom Regulatory Authority of India (TRAI)**[Consultation Paper On Regulatory Framework for Over-the-top \(OTT\) services](#)**

The regulatory treatment of OTT services is an issue of global scope. In the case of India, an emerging economy but with deficiencies in terms of the implementation of infrastructures and guaranteed universal service and access to the internet, the public consultation of this country's regulatory authority (TRAI) has found that, even in developed markets, the net neutrality principle is difficult to apply. By virtue of this principle, telecom operators cannot discriminate between the data traffic circulating via their networks, even when these are free services for which the operators themselves would charge (for example, instant messaging via mobile, internet telephony or VoIP/mVoIP, pay-TV via a cloud or video streaming services). These services may also require significant bandwidth and could saturate the network. This problem, moreover, is accentuated in countries with limited or insufficient infrastructures. As a consequence of this asymmetry between the treatment received by OTT players and telecom operators, the Indian regulator is proposing to re-open the debate regarding net neutrality, the principle by virtue of which telecom operators cannot prioritise their own internet services above those of other companies. Net neutrality had been one of the bones of contention, both of the previous European Commission with Noëlie Kroes at its head and also of the Obama Administration, and had been considered as a progressive anti-trust policy.

United States Court Appeals**[USA: legal endorsement of the net neutrality principle](#)**

Net neutrality (sometimes NN) is an issue that runs in parallel with OTT regulation. On 14 June 2016, the US Court of Appeals endorsed the new regulation passed by the FCC (the communications sector regulator in the US), which entered into force on 12 June 2015. This regulation toughened up the NN criteria required from internet service providers (ISP), prohibiting the blocking or slowing down of the internet data service for end users, as well as prohibiting the prioritisation or speeding up of the transmission of those websites paying a fee to the ISP. Internet service firms, start-ups and technology innovation sectors have implemented actions in favour of NN (see: [The Washington Post](#)).

The Structure-Conduct-Performance Analysis of OTT Media

Professors Qiling Qin and Ping Wei, from the University of Huazhong (China), claim that the structure of the OTT media market tends towards concentration and monopoly. This article reviews the role played by OTT licences, content providers, telecoms, internet service providers and other players and analyses market mechanisms such as economies of scale and resource allocation in a digital environment. In services that distribute content via OTT platforms, the prevailing logic is the market approach of “winner takes all”, clearly limiting the diversity of ownership and supply in the medium term and therefore requiring public intervention to correct the market dysfunctions.

Over-the-Top Content and Content Regulation

This is a personally produced report by the legal head of economic monitoring of Brazil’s Ministry of Planning, Roberto Taufick. The author explains that the OTT sector is made up of an open market without barriers of access to new players. And this is due to the principle of net neutrality which permits direct, global access by consumers to these over-the-top services. This lack of regulation results in a proliferation of start-ups, many of which will fail in the near future but without this being seen as a problem. The role played by potential national regulations would be detrimental to local competition and innovation although Taufick does believe that global governance of the internet is required.

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Presentation of the articles

The article must be presented in electronic support (PC and Word format preferred). Every page must be 30 lines approx. and **body size 12**. The maximum length is about **6.000 words**.

The cover sheet has to be provided only giving the title, the name of the author(s) and position, postal and e-mail addresses. The article has to include an **abstract of 90-100 words and five keywords**.

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Tables and figures have to be provided with **short, descriptive titles** and also be numbered in Arabic numbers. All footnotes to tables and their source(s) should be placed under the tables. They must be inserted not as an image but in an **editable format** (e.g. in Excel).

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Book reviews guidelines

1. The aim of the section 'Critical books review' is to review the most important new publications in the world of communication and particularly in the field of broadcasting.
2. Reviews must be original and previously unpublished.
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