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PANDEMIC, AUDIOVISUAL CONSUMPTION AND FUTURE TRENDS IN COMMUNICATION

Pandemia, consumo audiovisual y tendencias de futuro en comunicación

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Abstract

This article delves into the most important changes that have taken place in the field of communication in the context of the pandemic caused by COVID-19. Aspects such as the increase in media consumption, especially in digital and online media, the importance of current affairs in this crisis and the growth of fiction and entertainment content are some of the issues mentioned in it. A large number of sources offering very up-to-date data are used and, in addition, we have included the results of our own research based on a panel of university students. In the first part, and from a global perspective, we offer references of different countries of all over the world to, later,

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locate the theme within the Spanish boundaries. In the section including the data from the panel of Basque university students, the article describes the aforementioned young people's media consumption and attitudes about both legacy and online media. In the final section of the article, we comprise some reflections on the current moment and future trends in the changing world of communication. Among the conclusions, two should be highlighted: to place the current crisis at a time of change and expansion in the various communication practices and to assign to the youngest innovative positions in the how, what and where consume media, specially, online media.

Keywords: Pandemic; Audiovisual media; Online media; Information; Media consumption; University students; Social media.

Resumen

Este artículo hace un repaso a los cambios más importantes que se han producido en el campo de la comunicación a raíz de la pandemia causada por la COVID-19. Cuestiones como el aumento de los consumos mediáticos, sobre todo en los soportes digitales y en red, la importancia de la información en esta crisis y el crecimiento de los contenidos de ficción y entretenimiento son algunos de los aspectos analizados en el texto. Para este trabajo se ha contado con una gran cantidad de fuentes documentales que ofrecen datos muy actualizados y, además, se han utilizado los resultados de una investigación propia con un panel de estudiantes universitarios. En la primera parte, y desde una mirada global, se hace referencia a distintos países del mundo para, después, situar el trabajo en el ámbito del Estado español. En el apartado relativo al panel de universitarios vascos, el texto desgrana los consumos y las actitudes de los jóvenes para con los medios y las plataformas de comunicación *online*. En la sección final del artículo, se reflexiona sobre el momento actual y las tendencias de futuro en el cambiante mundo de la comunicación. Entre ellas caben destacar dos, aquella que sitúa la crisis actual en un momento de mutación y expansión en las diversas prácticas comunicativas y la de atribuir posiciones innovadoras a los más jóvenes en cuanto al cómo, qué y dónde conectarse a los medios y recursos de comunicación en red.

Palabras clave: Pandemia; Medios de comunicación audiovisual; Medios *online*; Información; Consumo; Estudiantes universitarios; Redes sociales.

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1. INTRODUCTION

2020 will go down in the history books with the reference to a virus that disrupted daily life in almost all its facets. It is likely that beyond the numbers of dead, infected and

the dramatic logarithmic curves that illustrate them, reflections will emerge on the impact that COVID-19 has had on the way in which societies are built, the power relations between and within them and the role played by communication. We are sure that this account will mention, among others, the new forms of mediated communication, the social contradictions regarding the digitalization process and the convergence of the large technological companies. In short, and in a single word, the Internet, as a system in which, among others, the different media and communication supports are materialized. Because the Internet has become the protagonist of this worldwide enclosure and because among the different cultural, economic, social and technological gaps that exist, connection has been and is the common multiple in the global response to isolation: connecting to the network to overcome the "social distance" and relate, connecting to the network to work, connecting to the network to be entertained, connecting to the network to play sports, connecting to the network to receive cultural content, connecting to the network to know what is going on.

From the point of view of communication, many aspects have emerged during this pandemic, such as the structure on which power orbits on the Internet; the creation, transmission and consumption of content, including information content; the relevance of audiovisuals in today's culture and the weight of fiction in social practices and uses, among many others.

After the appearance of the coronavirus, news consumption has increased and all the indicators observed for years have reached maximums week after week -number of visits, users, duration-, and social networks have expanded their social penetration and connection time they monopolize (The Social Media Family, 2020). Moreover, during the confinement, citizen concern about the proliferation of fake news has grown (Perez-Dasilva et al., 2020) and although media advertising investment has fallen (Rivas, 2020), new media products and new work routines for communication professionals have emerged (Berkeley News, 2020).

And all this takes place in a general context in which the convergent process between telecommunications, information technology and the media affects both the production and transmission as well as the reception of content, including audiovisual content.

...convergence should not be seen as a stage, but as a process and, as such, a changing phenomenon: its degree should be assessed in the light of technological innovations, but especially their social appropriation. Moreover, its consequences are manifested at different levels depending on whether the business dimension, the technology dimension or the content dimension is taken into account. The interactions between the three dimensions have cultural and social consequences that make the observation of this process relevant. (Prado, 2009, p. 33).

It is precisely the aspects related to the reception, use and consumption of traditional media and those networked media that allow the transmission of audiovisual content that are consolidating as drivers of change. The way we see and experience the different communication media and their contents will mark the future of the media

which, although, in the case of audiovisual media, still have television as their main support, the panorama is evolving rapidly (Kantar Media, 2020).

New attitudes towards media, sequential media and especially online media, have manifested themselves more clearly among young people (Tubella et al., 2008; Ramos, & Pac, 2019). This is a sector of society that is more open to watching audiovisual content at any time and place, using different reception devices and accessing more autonomously those general or very specific contents that are of interest to them.

Digitalization is still in its first decades and will need time to write its own path. Beyond the strong impact it has already caused, experience shows that changes in supply, uses and consumption are a field of analysis that needs to be worked on on a daily basis.

Hence the relevance of strengthening some of the lines of research that focus on the analysis of uses and consumption, levels of gratification, evolution in the supply of audiovisual content and audience reaction (Lozano, 2018; Santiago, 2019).

Although it has traditionally been pointed out that there are two parallel structures in the world of audience research, the one coming from the industry itself and the academic one, it seems that nowadays both tend to converge in their interests (Arana, 2011). Because, although it has been written that commercial research has often played a "part role", no one seems to doubt that it has been a sector that internationally and also in the Spanish case has achieved stability and has become instruments that quantify and arbitrate the ups and downs of the audiovisual market. Of course, it has often shown a certain tendency to overestimate technological innovations and to overestimate the size of the large companies in the television sector and, now, of the rest of the audiovisual content providers, from any of their broadcasting media.

A methodological approach that brings together the best of quantitative and qualitative techniques is particularly interesting. In particular, the latter because they help us to understand the motives and evaluations made by users, beyond the specific data, however striking they may be.

Among the different research carried out in universities we will point out some of the most significant works and authors (Astigarraga, 2017), in many cases we will refer to studies focused on the younger sectors of society and how they are internalizing the paradigm shift in mediated communication (Livingstone & Sefton-Green, 2016; Livingstone & Bober, 2004; Evans, 2011; Gray & Lotz, 2012, among others).

Thus, for example, Barkhuus (2009) qualitatively analyzes the evolution of audiovisual consumption on the Internet and television among young American college students.

González Aldea and López Vidales (2011), from a more quantitative point of view, delve into the tastes of young Spaniards between 18-25 years of age and their gradual

detachment from traditional television, because it does not allow higher levels of interactivity and is pigeonholed in the same content and formats.

Bondad-Brown (2011) in her doctoral thesis compares the consumption of traditional television and those offered by *online* audiovisual services. From the analytical framework of Uses and Gratifications (Flores-Ruiz & Humanes-Humanes, 2014) she studies the motivations of the audience for different audiovisual content.

The research by Arango-Forero (2013) is another reference to consider regarding the consumption of traditional television and the Internet by young people, in this case Colombians.

Particularly fruitful are the works of Pavón-Arrizabalaga (2014), on adolescents and their media consumption; Landabidea (2013), focused on social perceptions of television; and the aforementioned Astigarraga (2017), which analyzes the audiovisual consumption on television and the Internet of young Basque university students.

As we have seen, the current state of research on communication uses, the relationship with its audiovisual content and audiences highlights the importance of those works focused on young people (Garitaonandia et al., 2019). Undoubtedly, from the conviction that the consumption patterns and opinions expressed by these young people may be indicative of future social patterns.

To speak of youth and digital media is to speak of a phenomenon that is radically modifying the patterns of time use and social relations. In other words, the consumption that young people make of digital networks, and specifically the Internet, is transforming not only leisure and the ways in which this segment of the population interacts with its environment, but also, by extension, society as a whole. It can be said that, for the first time, it is the youngest individuals who are taking the initiative, acting as drivers in terms of the use of the media and the functions they will undertake in an intercommunicated manner. Something like an "upward socialization" in ICT (Information and Communication Technologies) (Rubio, 2010: 201).

Along the same lines, the study entitled "Youth as *early adopters* of technological change: an analysis of young people in Aragon (Spain)" highlights the relevance of young people in these new socialization processes.

If we consider young people as early adopters, they would exercise a leadership function through which other social groups, especially potential adopters, would have them as a reference, to the point of waiting for their advice and information on the innovation in question to end up incorporating it into their lives (Rogers, 1983: 249) (Ramos & Pac, 2019. 3).

For an exhaustive analysis on the relationship between young Spaniards and technology are very interesting works such as those of Puente et al. (2015) and Campo, Pereira and Simões (2016) focused on Portugal and, in particular, those of Feixa (2000 and 2014) on what he calls *generacion@* and *#generación*.

2. OBJECTIVES

The coronavirus has shaken many of the foundations of today's society, including those related to communication. In a short period of time, the role that traditional media and new *online* communication media played in our daily lives has undergone major changes.

The objectives of this article are to compile diverse information on the evolution of the how, what and when of media consumption during confinement; to try to discern the most novel aspects; and, in particular, to delve into trends detected in young audiences. This article also points out a series of key ideas in the current and future framework of communication, beyond the cyclical ups and downs that may have occurred in audience ratings.

3. METHODOLOGY

Two lines of work have been used simultaneously in the preparation of this article. In the first, we have delved into the impact that the crisis generated by COVID-19 has had on audiovisual media consumption and information traffic on the Internet, the most used contents and the role played by information, fiction and entertainment among them. For this purpose, a large number of documentary sources have been used, including Comscore, Reuters, NiemanLab, Kantar Media, IMOP Institute, AIMC, Barlovento and Netflix, and taking as a time reference the first four months of 2020, the date on which the coronavirus crisis broke out, and always with notes on the months before and after the confinement. There is also a quick review of some secondary documentary sources that situate the subject of the paradigm shift that has taken place in communication. In this first part we will begin by drawing very global frameworks of analysis and broad geographical and temporal references, and then focus on Spain.

Secondly, and in order to learn about the uses of information and communication technologies (ICT) and the consumption of different audiovisual products by young university students in this important period of current history, we turned to Ikusiker, a panel of more than 700 students from the University of the Basque Country/Euskal Herriko Unibertsitatea (UPV/EHU). The members of the panel have answered during the confinement a series of questionnaires (we use the platform www.encuestafacil.com) that have been sent to them via WhatsApp and that allow us to know first hand and in a comprehensive and quick way their audiovisual consumption and communication practices mediated by technological equipment. The data we are considering here have well-defined temporal (first quarter of 2020) and socio-demographic (young university students, aged 18-23) boundaries and their generalization should always be subject to this consideration. However, the information provided by the panel gives a clear view of trends that will undoubtedly be replicated in broader social environments in the short term future.

The final part of this document includes a series of reflections and ideas, from a prospective point of view, trying to approach the foreseeable consequences of the technological and social changes accelerated by the coronavirus.

4. SOME OF THE KEYS TO THE CURRENT SITUATION

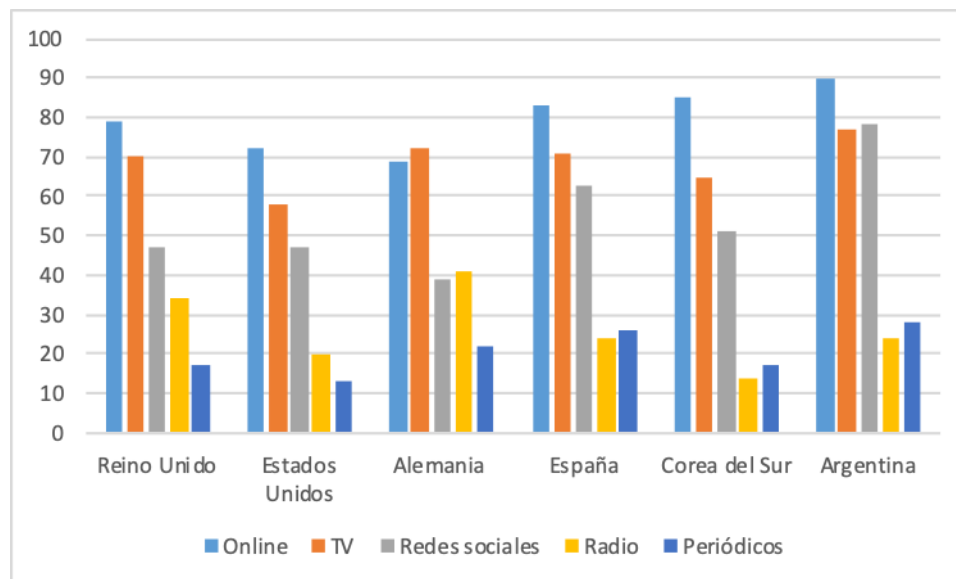
The arrival of the Internet in the last decade of the last century is part of a long process in which we are still in the midst of and which has brought about major changes in society (Castells, 2009). Its rapid expansion has also revolutionized the media ecosystem: traditional media -paper, radio, television- have shown signs of resilience although they have lost weight, and the media industry has begun to turn the rudder towards digital, propelled by the no less shocking changes in consumption habits among users (Madinaveitia, 2020). Small and large media companies have had to reposition themselves and write a new script in which users surf the Internet in a cloud of unlimited data and content.

It was on this playing field that COVID-19 appeared and fueled a series of trends that were already present. And it did so by provoking two very interesting phenomena in the network: the virtual universalization and standardization of ICTs and a significant growth in media consumption (Nielsen et al., 2020). Coinciding with the first consequences of the declaration of the state of alarm, the question in the air was "what is going on?", and the search for answers brought with it an unusual increase in the number of visits to different websites.

This is the context in which we face this research and in which we will delve into from several points of view. First, we will review what has happened on the Internet in terms of information; then, we will analyze the phenomenon of social networks and messaging applications, that is, we will delve into the study of the forms of immediate and uninterrupted interpersonal communication; then, we will develop the issue of the evolution in the consumption of traditional television and *streaming* platforms; and finally, we will focus on the consumption of young people.

4.1. Information on the Internet

With the pandemic, news consumption grew in all parts of the world. The need to obtain information materialized in countries as different as Germany, Argentina, the United States, South Korea, Spain, or the United Kingdom, whose citizens tracked information through social networks, search engines, video portals and messaging applications, or a combination of all of them (Nielsen et al., 2020). The increase in news consumption is clearly seen in the six countries analyzed in the report entitled "Navigating the 'infodemic': how people in six countries access and rate news and information about coronavirus" and covering the period from late March to early April 2020. *Online* media and television were undoubtedly the most used ways to access information about the health crisis, as can be seen in the first of the graphs.



Graph 1. Use of the different systems to collect information on COVID-19.
Source: Nielsen et al. (2020).

Online resources are the most used by the citizens of these six countries, followed by TV. The share of social networks is in third place, although it is quite different in Germany and Argentina, and radio and newspapers occupy the last positions in relevance as sources of information on the coronavirus.

As a general rule, news consumption increased across the board, but the same report also reveals notable demographic differences: while young people identify digital media - and often social networks - as their first source of information, older age segments turn mainly to television. The COVID-19 crisis therefore highlights the global nature of the impulse to seek information, but also diversity in the ways of obtaining it. The big information companies (newspapers, television, news agencies, etc.) channel a large part of this demand, but they are not the only recognized sources, nor the only media to which people turn. Thus, that part of the population that remains *online* without interruption consults websites, social networks or other online resources. Information is thus spread across different media and supports, in both the public and private spheres of communication.

The upward trend in information consumption has continued during the confinement. The agency Comscore (2020), which measures Internet audiences and the behavior of digital users, pointed out that, in light of data from some 40 news portals selected for analysis, the week with the highest number of visits to news sites in the whole year was that between March 16 and 22, with a significant difference (up 18% compared to the previous week and 68% compared to the same period of the previous month). Likewise, the amount of information consumed on each of the countries under study experienced above-average growth: news visits by country increased by 89% compared to the days between March 16-22 and February 17-23, and in the same period the subcategory of

general news increased by 62%. This proliferation of proximity news is undoubtedly explained by the need for citizens to understand how the crisis will affect their daily lives and their immediate geopolitical environment (Molay & Essling, 2020).

Beyond the overall aggregate data, after collecting information from five European countries (France, Germany, Italy, Spain and the United Kingdom), data on general interest news portals were also published in March (Gevers, 2020a and 2020b). The increase in the total number of visits to news portals demonstrates when and how quickly the pandemic caught the public's attention. According to these studies, visits to general news portals remained stable until the week of February 10-16, 2020; thereafter, Italian consumption skyrocketed at the same pace as the dramatic situation in the transalpine republic during the state of emergency and, in the other countries, interest gradually increased until March 15. Since the beginning of the year, the number of visits grew by 50% in France, 29% in Germany, 142% in Italy, 74% in Spain and 44% in the UK (up to March 15). Thereafter, however, although news consumption continued to rise, and in some countries very clearly, the growth rate stagnated: since the beginning of the year, general news consumption increased by 68% in France, 57% in Germany, 125% in Italy, 87% in Spain and 51% in the UK (to March 22).

In terms of information consumption, there was also a worldwide appetite for economic and financial topics. Consumption associated with the "economy" category increased by 21% in France, 34% in Germany, 90% in Italy, 47% in Spain and 39% in the United Kingdom up to March 22. This thematic predilection was temporarily activated even before general news (Comscore, 2020).

On the other hand, interest in information on each of the countries also increased in Italy as of February 10 and in the rest of the countries as of March 2. The magnitude of the growth in local news is quite remarkable (more accentuated than in economics and finance, mentioned above). Thus, in 2020, local news consumption increased by 125% in France, 101% in Germany, 105% in Italy, 158% in Spain and 45% in the United Kingdom (up to March 22). The weight of local was much higher than the growth of international news in the case of France, Germany and Spain; similar in Italy, although slightly upward, and decreased by 6% in the UK. The *timing* of the spread of the pandemic in the different countries, the respective isolation measures applied and the characteristics of the corresponding media ecosystems may explain these differences. But there is no doubt that, among the most noteworthy aspects at the international level during the COVID-19 crisis in the first part of 2020, information has been essential and the media have contributed to socialize the crisis and to exemplify the ways in which the population should act in response to it. However, one in three citizens stated that the *mass media* had exaggerated the importance of the pandemic; although, in parallel, the level of knowledge about the coronavirus was statistically higher among those who used the media as a source of information (Nielsen et al., 2020).

It is also worth mentioning the complex phenomenon of information bombardment and surfing, in many cases surrounded by false and unverifiable news, which has been called *infodemia*. That is, the overabundance of information that is impossible to verify

and even socially assimilate. A danger that goes beyond the coronavirus but for which the World Health Organization, in its September 2020 declaration, proposes:

...manage infodemia by promoting the timely dissemination of accurate, scientifically and evidence-based information to all communities, particularly high-risk groups, and by preventing and combating the spread of misinformation and false information, while respecting freedom of expression. (WHO, 2020)

According to what has been said, information consumption increased in the midst of the viral spiral and media audiences reached record highs. However, these high levels and the changes they illustrate need not be understood as an unequivocal sign of a "new normal" in media consumption. According to the NiemanLab experts (Benton, 2020), it is difficult to maintain attention for long, no matter how important the event or the subject matter, people's lives go on, so knowing the mechanisms that allow to maintain the audience's interest and influence it will continue to be an important challenge not only for the media, but also for society in general.

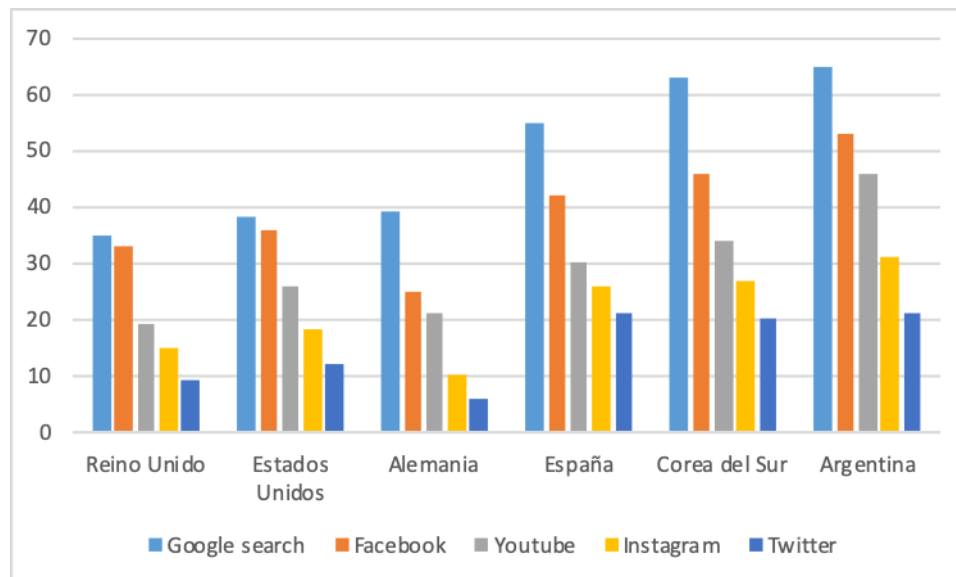
As we have already noted, interest in COVID-19 peaked in mid-March and by the end of the month there was a drop in international measurements. A certain exhaustion from receiving and having to process so much information was evident. But why did this happen? According to the Reuters institute, there are three reasons that may have contributed to people's deliberate avoidance of the news: current affairs information depresses people; it makes them feel powerless because they cannot influence events; they perceive it as superficial, sensationalist and inaccurate, if not untrue (Kalogeropoulos, 2020). Likewise, there are ongoing studies that seek to correlate excessive news consumption and increased anxiety, which has come to coincide with some of the recommendations of mental health agencies that advised moderating media consumption during confinement. On the other hand, the Wired portal spoke of the worrying consequence of this fatigue, since it made it necessary to continue to maintain the attention of the audience because the pandemic could only be adequately addressed with a well-informed citizenry (Bedingfield, 2020). Few question the relationship between information consumption and the level of understanding of the crisis and, in light of the data, news readers are better informed.

4.2. Hyperconnectivity

As already mentioned, information consumption and media audience levels increased during the coronavirus crisis, but these were not the only ratios that increased. Among other things because information was not only consulted on the websites of traditional media, but also had an enormous weight on social networks or messaging applications. And, of course, the use of both became widespread because they are linked both to information and, above all, to entertainment, personal relationships of friendship or family or with the educational system -the use of *online* teaching resources on a massive scale has been another of the novelties of confinement-. Hyperconnectivity is therefore one of the keys to this second decade of the 21st century in which we live.

The constant and ubiquitous presence of digital technologies in almost all daily activities, thanks largely to the proliferation of mobile devices with Internet access, is leading to the consolidation of an "era of hyperconnectivity", which is also characterized by an overabundance of information and a culture of speed. However, there are many authors who warn of the possible neurological, affective and social damage that permanent digital connection can cause (Serrano-Puche, 2013). (Serrano-Puche, 2013)

Social networks and messaging applications play a leading role in this age of immediacy and, although they clash with the classic business model of the media, they are also a common place for the consumption of information. More and more people are turning to search engines and information platforms. Examples are the special *hub* of the search engine Google (<https://www.google.com/covid19>: "COVID-19 Information and Resources") or the "Coronavirus (COVID-19): Information Center" presented by the social network Facebook (https://www.facebook.com/coronavirus_info). Youtube also provided in some countries information on the coronavirus offered by health authorities and, similarly, Twitter disseminated tweets from the media and public institutions. Many of the major platforms also provided advertising space to disseminate public health messages. Although the overall figures vary from country to country, the percentages included in Figure 2 clearly indicate the global trend of using search engines and social networks to learn about the coronavirus (Nielsen et al., 2020). The figures for Argentina, South Korea and Spain stand out above those for the UK, USA and Germany.



Online platforms used to access information on COVID-19.

Source: Nielsen et al. (2020).

In addition, young people in the different countries expressed more trust in social networks than the figures for the total population, especially in those networks that are more recent and have a more evident visual component, such as Instagram, Snapchat

or TikTok. The most prominent figure in the aforementioned report by Nielsen et al (2020) is that of Argentina: almost half of young people between 18 and 24 years of age (49%) reported having used Instagram to receive content on COVID-19.

Messaging apps also joined the explosion in information consumption. WhatsApp, for example, launched a World Health Organization *chatbot* and limited users' ability to forward messages as a measure to combat misinformation. Much attention has been paid to these bounded environments because they allow private communication between individuals and groups exchanging a large volume of information between them, but they remain difficult platforms to investigate, both because of the lack of access to the data and the encryption of the networks. Nevertheless, some general trends seem to be taking hold among users and mainly in terms of the extent and frequency of their use: almost four out of ten respondents were active in a Facebook group about the coronavirus and more than half in WhatsApp groups.

The uninterrupted connectivity accelerated by the coronavirus has resulted in social networks and messaging applications being used not only to receive information, but for many other uses.

In the case of social networks, the proliferation in the number of visits was gradual and only in the week of March 9, 2020 was an increase noted (this phenomenon was probably related to a very widespread daily use of social networks, and the increase refers to the confinement and habit of use of each country). The growth in the use of portals and applications in social networks reached 12% in France, 31% in Italy, 48% in Spain and 12% in the UK, while in Germany it remained at the same level (Gevers, 2020a and 2020b).

Regarding the use of instant messaging applications, the impact of the containment measures in each country is also evident. Consumption remained stable until the week of February 17-23, 2020. A week later, things started to change in Italy, days before the nationwide quarantine was announced, which occurred on March 9. In the rest of the countries the data began to vary from March 9 onwards (Spain declared a state of alarm on March 14 and a day later the confinement of the population, France started quarantine on March 17, the United Kingdom on March 24 and Germany on March 24).

According to the same sources, taking 2020 as a reference, and up to March 22, the consumption of instant messaging applications increased by 70% in France, 30% in Germany, 90% in Italy, 97% in Spain and 49% in the United Kingdom.

In light of the data analyzed and in light of their context, the general increase in Internet use is noteworthy. Connection figures grew worldwide as the COVID-19 pandemic progressed. There have been millions who have been working from home and no fewer who have continued their studies once schools and universities were closed (Li & Lalani, 2020). Those who tried to overcome the social distancing caused by the health crisis and talk to their family and friends, find out what was happening, learn more about cooking, do sports... and, especially and very importantly, consume audiovisual content:

series, movies, music videos, documentaries... which has led to a significant part of the population spending many hours a day on *online* platforms and *streaming*.

In the following section we will review the social relevance that the audiovisual has acquired at the beginning of the pandemic.

4.3. Audiovisual

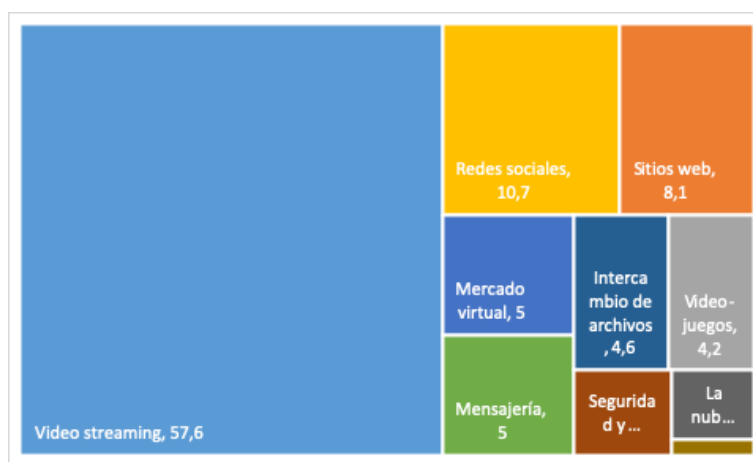
The growing importance of audiovisuals in cultural consumption is evident and has come hand in hand with the increase in the social penetration of the Internet and the speed of data transfer in the network of networks. Its consequences have been many, but we want to highlight among them that the audiovisual language has become for many people the standard for both fiction and information, since this progressive audiovisualization of communication has also been noticed in the news (Deogracias, 2015). The influence of the audiovisual has affected, as it could not be less, another medium that uses the same language, television. In addition to feeling the impact of a social network such as YouTube since its birth in 2005, in the last period there has been a major expansion of new audiovisual operators and in particular of *streaming* platforms. Traditional television has seen its hegemony shaken both in terms of business model and programming and audience strategies (Bustamante, 2003).

The visual has always been a very relevant part of contemporary Western culture and with *online* technology that importance has only increased (González, 2018). The narrative taken to the audiovisual is more socially impactful. The narrative gains in strength, closeness and veracity, and the use of devices that allow access to such audiovisual content anywhere and at any desired time has become widespread. Mobile and computer screens, as well as connected TV screens, have become everyday objects for the vast majority of the population. The penetration of screens of different sizes is a relevant fact and so is the time that the public devotes to them. Information and Communication Technologies are widespread and the level of functional literacy allows their widespread use (Martinez, 2019). The coronavirus crisis has put it in black and white.

The pandemic has shown that in times of social crisis, media consumption increases and that people resort especially to audiovisual media not only to cover their information needs but also in search of entertainment content. In the context of the coronavirus, the figures reveal that since the health crisis, media consumption has increased, especially audiovisual media: 67% of those surveyed watched more news programs than before, 51% increased their consumption of paid fiction content and 45% used more television than before (Statista, 2020^a). Likewise, among the ICTs that gained in importance were instant messaging (45%), social networks (44%) and video games (36%). As we have already analyzed, within the framework of these trends, there was an increase in the consumption of information, both from digital media and from social networks or messaging applications, television and *streaming* platforms, as we will detail below.

In the case of the Spanish State, an increase in the time devoted to television is observed during the confinement (Kantar Media, 2020). According to the special report published by the consultancy Barlovento Comunicación (2020), in March, the average time in front of the big screen was 284 minutes (233 minutes in 2019). As if that were not enough, the level of consumption on March 15, when the confinement began, is particularly striking: 344 minutes. Moreover, these two figures correspond to the average of the population (whether or not they switched on the TV), but if we look only at those people who actually watched TV, the consumption time of these viewers was 371 in March and 426 minutes on the 15th of that month. Record figures in the history of Spanish television consumption.

But beyond the audimetric ratios of traditional television, it is essential to mention OTT (Over-The-Top) platforms, connected television and *streaming* audiovisual content. All of them have one element in common, they are from the *online* audiovisual sphere. And although not all *online* audiovisual consumption achieves the same data, it is noteworthy that *streaming* viewing accounted for 57.6% of downloaded traffic worldwide in 2019 (Sandvine, 2020):

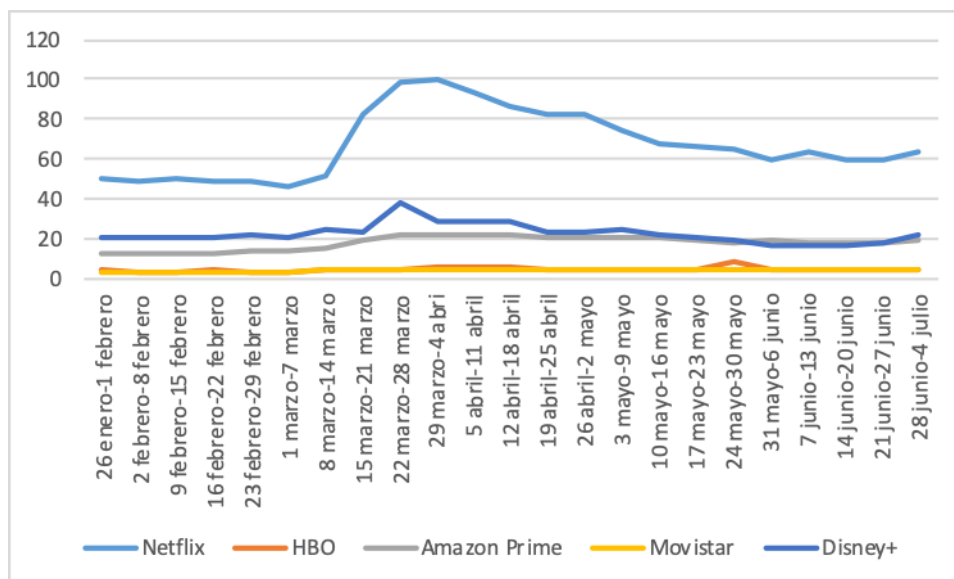


Share of network traffic worldwide, by activity.

Source: Sandvine (2020).

The weight of *streaming* platforms in the audiovisual landscape was already significant in the pre-pandemic era and, of course, the global health crisis has led to a significant increase in their reach and use.

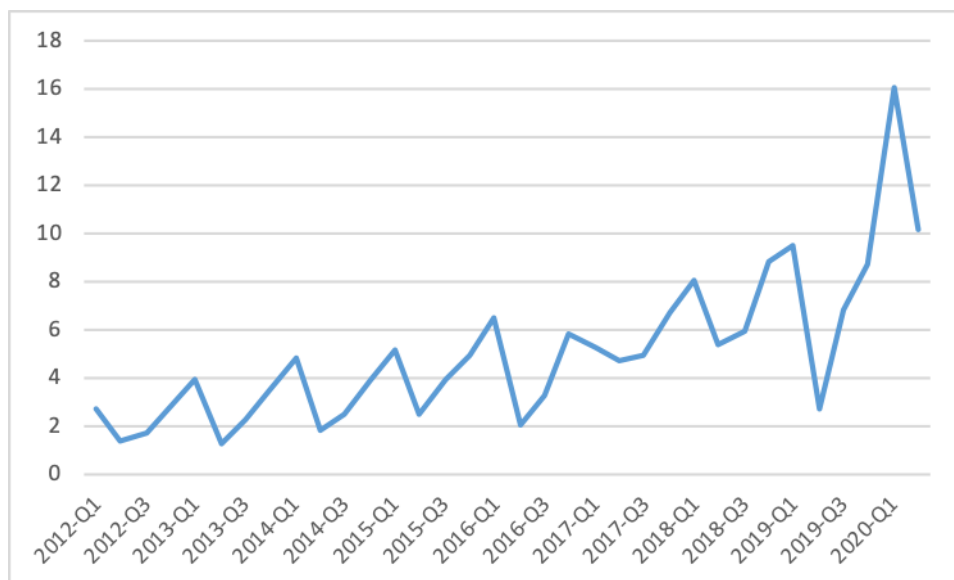
A symptomatic example is the Google search engine in Spain, where queries about prices, contracting and services offered by the different *streaming* platforms grew significantly during the COVID-19 crisis (Trescom, 2020). The number of questions about Netflix stands out, but there are also many questions about the other major players in video on demand worldwide: HBO, Movistar, Amazon Prime and Disney +. The record, indicated by the 100 mark, is reached in the fourth week of March and, thanks to Netflix, the rest of the platforms obtain more modest levels. As can be seen in the graph, the maximum reached on those dates drops in the following weeks.



Evolution in Spain in the number of Google searches on streaming platforms.

Source: Trescom (2020).

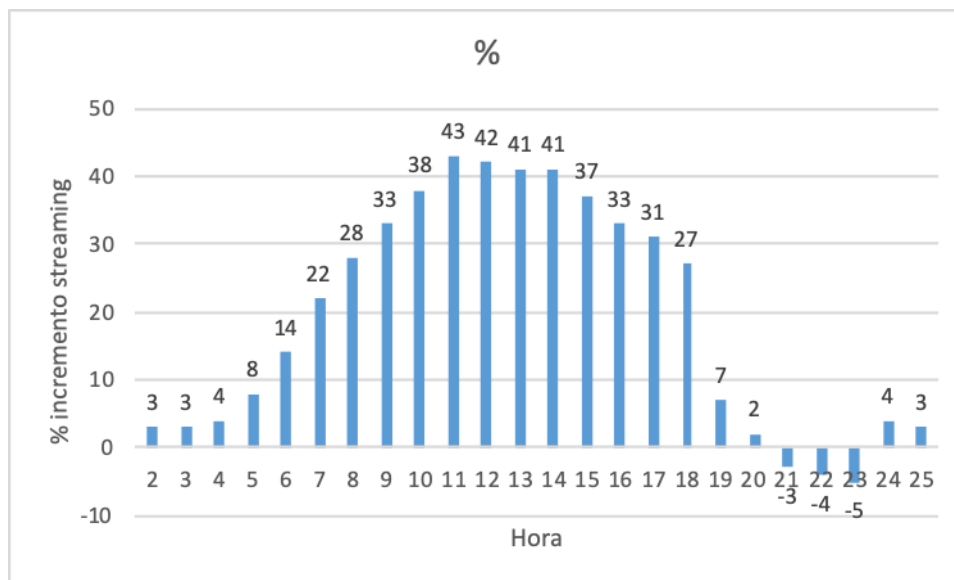
Another indicator of Netflix's undeniable superiority is the number of new subscribers during the confinement worldwide, with 15.8 million new paying customers between January and March, which represents 183 million subscriptions, 23% more than last year (Netflix, 2020). The graph published by the Statista portal (2020b) shows the impressive growth in the number of households subscribed to this OTT.



Evolution in the number of new Netflix subscriptions worldwide.

Source: Statista (2020b).

From the hand of one operator or another, the phenomenon of *streaming* viewing during quarantine caused changes even in the usual times at which the population watched such content (Conviva, 2020). Thus, and although it is well known that the time slot par excellence of television is the *prime-time* (between dinner and bedtime, which in the Spanish case covers the period between 20:30 and 24:00), *streaming* products consumed outside this historical prime time grew a lot. According to the analysis company Conviva, the percentage increase was mainly between ten in the morning and five in the afternoon, with the highest increase recorded between 11:00 and 12:00, 43%. This time shift must certainly be understood in the context of home confinement and new ways of managing time, but it should also serve to make new readings on the role of television programming departments and the techniques they use to attract and maintain the audience (Arana, 2011; Ihlebaek, Syvertsen & Ytreberg, 2013).



Percentage evolution of streaming audiovisual consumption, by time of day, worldwide.
Source: Conviva (2020).

As can be seen in the graph, the number of visits to *streaming* servers made in March 2020 in broad daylight and starting earlier increased and the only decrease was in the *prime-time* hours of traditional television.

So much did the consumption of VoD platforms increase as a result of the confinement that companies such as Netflix, Amazon and Youtube committed to temporarily lower "their signal strength in favor of the sustainability of fixed and mobile networks" (Lorenzo, 2020).

To conclude this subsection in which we are analyzing global trends, we will briefly refer to the phenomenon of *co-watching* (a term invented by Facebook, although it has spread as a generic label for applications such as Metastream or TwoSeven, which allow group content sharing). Confinement has not only boosted the consumption of

audiovisual content, but also the offer and use of applications to watch such content collectively (Sanz, J.L., 2020). Despite not being physically in the same place, these applications allow to "meet" through the same shared screen and bring back to the table the importance of living experiences in common, of the concurrence of users even if only virtually in a "place" and at a "time". This sharing has proliferated during the confinement beyond the linear programming of traditional television and platforms have come into vogue that also offer the possibility of self-scheduling viewing with friends or family members, creating *playlists*, i.e. a la carte consumption, but viewing the same content from different devices. Human beings are once again proving to be animals that seek proximity and shun social distance, also in their role as audiovisual consumers.

4.4. Some references to media consumption and attitudes in Spain during confinement

We have already pointed out that we can speak of a growing trend in media consumption during the weeks of the state of alarm. This has affected not only coverage but also the number of hours of Internet connection and the use of other media, mainly audiovisual. In what follows we will briefly review how the confinement has affected media consumption patterns in Spain, based on data provided by the IMOP Institute (2020) and the AIMC-Association for Media Research (2020).

During the different stages of the management of the coronavirus crisis in the first half of 2020 (from the declaration of the state of alarm and the confinement in Spain on March 14, through the three phases of the pandemic and, finally, the lifting of movement restrictions in the third week of June), the IMOP Institute has published up to ten reports, among other issues, analyzing the changes that have occurred in media consumption.

In line with the data presented in the previous sections, media consumption in Spain has increased, among them those of an informative nature, those based on audiovisual language and ICTs.

Thus, for example, according to the IMOP Institute, the increase in media consumption was noted both in its social penetration and in the time spent per day: during the first week of confinement, the number of people who spent four or more hours in front of the TV screen grew by 46%, and this percentage reached 81% in May. Similarly, radio, especially informative radio, gained in social relevance. As for Internet access, the difference was also substantial. Before the confinement, 76% of the population accessed the network daily from home and 46% when away from home. The minutes spent online in both locations were more than two and a half hours each day. During home confinement, the percentage of people connected from home rose to 83% of the population and 273 minutes per day. Consequently, the shift was downward in terms of out-of-home consumption, which fell to 10% of the population and the amount of time spent remained at similar levels (168 minutes per day).

The intensification of media consumption and of the different ICT resources was also reflected in the time spent playing video games and subscribing to *VoD-Video-on-*

Demand services. In the first case, it should be noted that 44% of the Spanish population between 14-64 years of age has played video games so far in 2020. This percentage is obviously much higher in the 14-34 age groups, exceeding 60%. The amount of time spent by *gamers* also increased and if before the coronavirus it was around 90 minutes per day per gamer, during the confinement it practically doubled (179'). If we look in particular at people under 25 years of age, the figures are even higher and went from the previous 110 minutes to 233 minutes per day during the state of alarm.

According to reports published by the IMOP Institute, the percentage of people subscribing to pay TV services grew in Spain (up to 45.3% of the population) and video on demand services, reaching 56.9%, mainly thanks to Netflix.

According to the "Logbooks" published by AIMC (2020), the confinement affected the time people stayed connected and also the purchase of technological equipment (*Smart TV*, tablet and laptop, etc.), which increased by 9.4%.

Finally, we would like to highlight that, according to those surveyed during the state of alarm, and although 93.7% positively valued the role of the media, when it comes to receiving contrasted and reliable information, "a certain saturation of information on the current situation" also begins to occur and, consequently, consumption of a recreational nature and with the aim of entertainment increases. (AIMC, 2020)

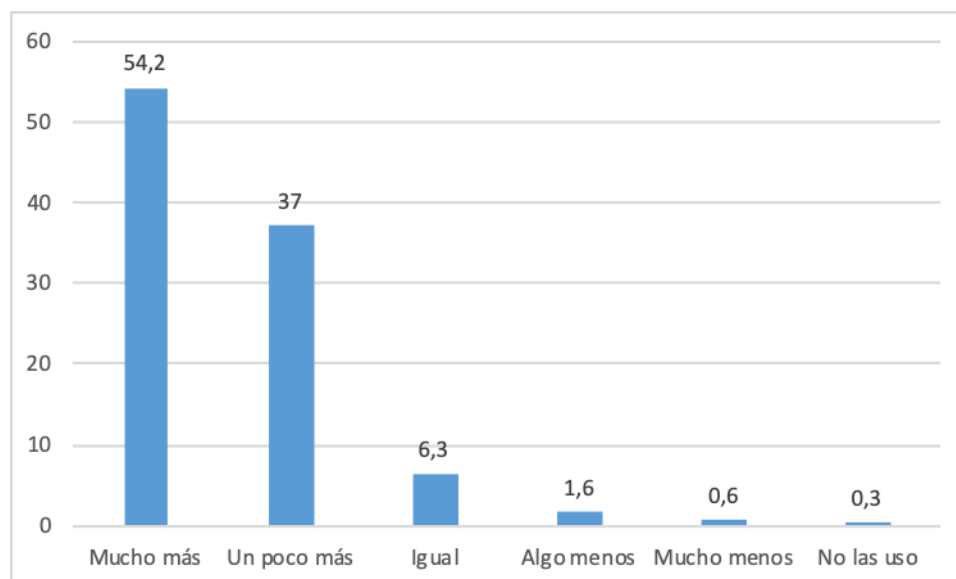
4.5. The when, how and what of digital consumption among young Basque university students

In the previous paragraphs we have highlighted the global changes that have taken place in media consumption and, in more detail, that channeled through *online* media and the Internet. As we have pointed out, we can see a greater penetration and importance in terms of time spent by the general population. We will now refer to a very specific group, composed of young university students aged 18-23, in the conviction that their consumption patterns can serve us to outline some trends that could be generalized in the near future to the rest of the population (on *trendsetters*, see Ramos & Pac, 2019). Because everything seems to indicate that some of the consumption patterns and attitudes towards the media that were usually attributed to younger audiences, during the confinement have spread to other age segments, almost with the same speed as the virus infections did. In television news we have seen videos uploaded to Youtube in which hospital workers appear explaining their experiences, calling for caution or singing as a sign of union and solidarity; the use of video-calls in nursing homes has become popular; the paid subscription to OTT services has grown enormously; in short: it has become essential to be connected. Even those who are more reticent, due to age, tradition in the use of ICTs or any other reason, have become experts in video-calling *software* or users of social networks during the state of alarm, and almost unintentionally. The month of March brought about an increase in the socialization of new technologies and the normalization of many cultural practices related to audiovisual content that until then had surfaced almost exclusively among

young people. And everything seems to indicate that these changes have no turning back and that the fight in the media and cultural field from now on will be played mainly in the digital sphere. For this reason, in what follows we will analyze the trends that appear among those younger audiences, more open to new consumption patterns and for whom technology is purely instrumental, those pioneering audiences.

For this purpose, as we have already indicated, we will use the data resulting from a research based on the stable panel composed of more than seven hundred students of the University of the Basque Country/Euskal Herriko Unibertsitatea, belonging to twenty different university degrees, from the three campuses of the UPV/EHU and from the Basque Country and other nearby areas. In this way, we will learn about the audiovisual consumption of young university students at a time in history when the coronavirus turned everyday life into a scenario of generalized confinement (Narbaiza, 2020).

When asked about their consumption patterns, the students were categorical in their answers: during confinement they have substantially increased their use of information and communication technologies and increased the time dedicated to audiovisual content, as can be seen in the following graphs.



Evolution in the level of audiovisual consumption and ICT use during confinement compared to previous periods.

Source: Ikusiker (April 2020).

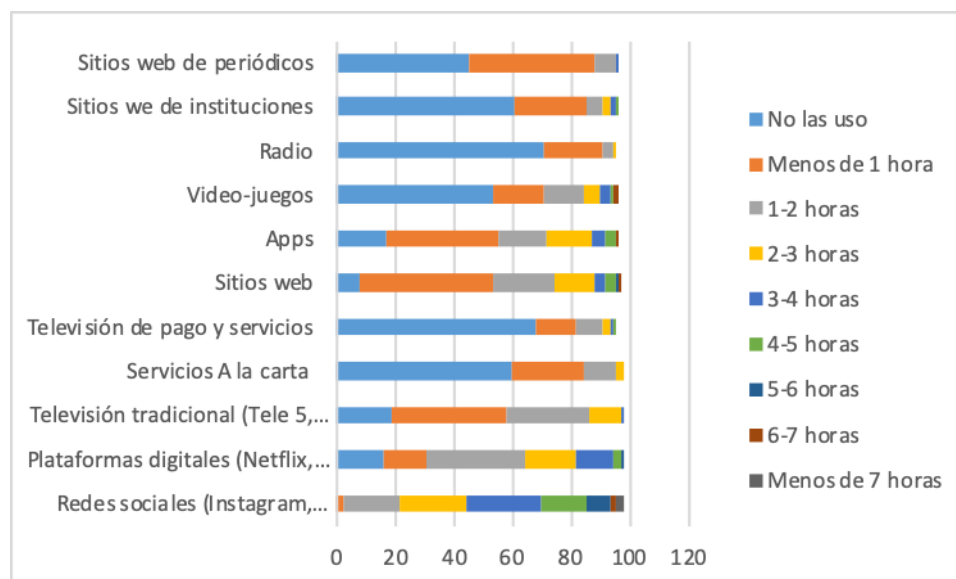
Only 8.8% of the panelists consume the same or less than before quarantine, the vast majority consume much more (54.2%) or a little more (37%) than before entering confinement. This makes a total of 91.2% of values upward.

In Figure 8 we will delve a little deeper into the aforementioned increase in consumption in order to find out in which specific media or supports the university students in the panel invest their time. At first glance, it can be seen that among young

people, some media and supports have more followers (and more intensive in their use). In any case, it would be a mistake not to pay attention to those that have fewer users. It is therefore necessary to make a detailed reading and, for example, to pay attention to those media apparently less successful, but which have experienced a significant increase during confinement. For example, pay-TV channels may still not have large numbers today, but they are substantially larger than they were a short time ago. The case of pay TV shows a rise from zero to 23% in a very short period of time and illustrates the changing media landscape and, in this case, the unusual interest in these services of multimedia giants such as Atresmedia or Movistar.

This graph also shows the amount of time that young people dedicate each day to consumption on different platforms and media. The responses show the break with the linearity of traditional audiovisual media, and we refer in particular to television. The number of devices used by young people also allows them to consume simultaneously on more than one medium and this option is used without complexes to synchronize, for example, social networks and *VoD*. Social networks, whether Instagram, Twitter, Facebook or YouTube, are clear examples of parallel consumption, as they are permanently activated in the hands of young university students while they consume other audiovisual content and/or as a tool for interaction, in many cases on the same content.

Before going into a more precise reading, two notes on fidelity to different media and content. There is no doubt that fashions and audiovisual trends among friends and colleagues become, to some extent, "social obligations" that encourage the viewing of one or another content. In this respect, there do not seem to be major differences from previous periods. But there are differences in the amount of this "obligation". The result is that those agents with the capacity to provoke trends are, in part, the ones that are growing rapidly. That said, there is no doubt that in the current audiovisual panorama there are very diverse types of content, those of the highest quality and millionaire budgets with those of an unquestionably amateur nature; and despite what it may seem, users do not experience them as self-excluding, but as pieces of the same audiovisual souk to which they can concur: paid and free platforms; local and global; in English, French, Basque or German. All of them contents of very diverse formats and origins that converge on the same playing field: the Internet. And in this wide virtual environment, videos and programs recommended by friends, programmed by traditional television channels and in many cases proposed to the user based on algorithms are intermingled. Content that, being accessible and in the digital environment, is part of the great contemporary audiovisual catalog (Prado, 2009).



Time spent by young university students in the Basque Country on each medium or platform during confinement.

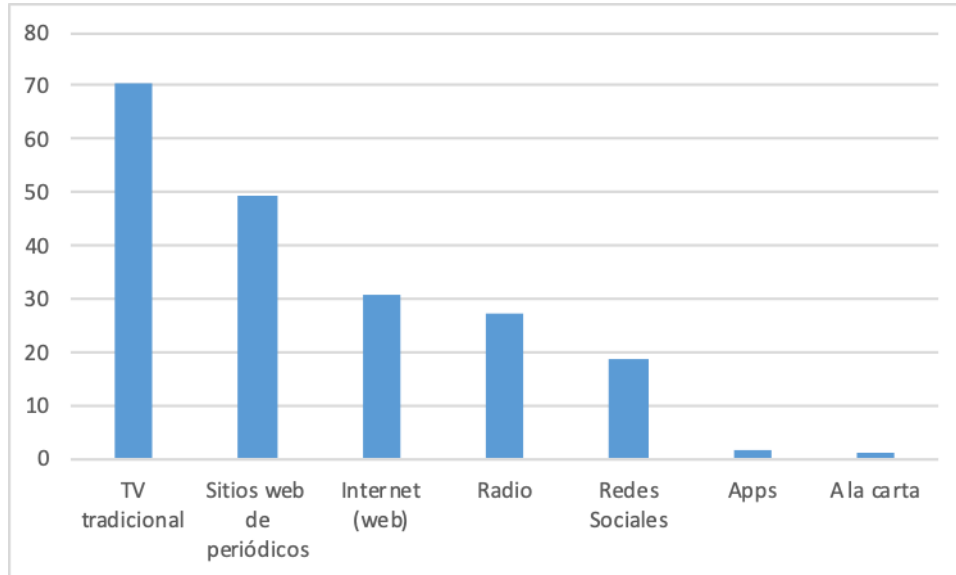
Source: Ikusiker (April 2020).

This graph shows the preponderant role played by social networks, both in terms of penetration among this young audience and the amount of time they take up, with the majority of the panel (61%) consuming between two and five hours a day. In contrast, the number of people who do not use them is only 0.4%. Youtube and Instagram are the preferred platforms, but others have entered with great force, such as the Chinese TikTok (it was not even mentioned in a survey of panelists in 2019).

The coronavirus has accelerated processes that had already been occurring more slowly, and thus the worldwide trend towards an increase in subscriptions to paid OTT services has spread, as we have already pointed out. UPV/EHU students are no exception. Six months ago, only half of them had access to this type of services; in the midst of COVID-19 the figures indicate that now more than 85% use these paid providers. As if that were not enough, it should be noted that to some extent the *de facto* monopoly previously enjoyed by Netflix is being broken and a trend towards having more than one paid service is taking shape. Although Netflix remains dominant (82%), other providers such as Amazon Prime Video and HBO are gaining weight among college students. In addition, and finally, some pay TV platforms in Spain are very popular, especially those offered by Movistar, which reach 7% among young people, but the strategy of pay channels developed by Atresmedia is also endorsed by the young audience.

As for the consumption of traditional television, during the days of confinement the viewing increased considerably, even among young people: in November 2019 there were more than 50% who declared not to watch television, a figure that is considerably reduced in the quarantine period (23%). In the same vein, it is necessary to analyze the increase in visits to newspaper websites, where half of young people (50.4%) enter

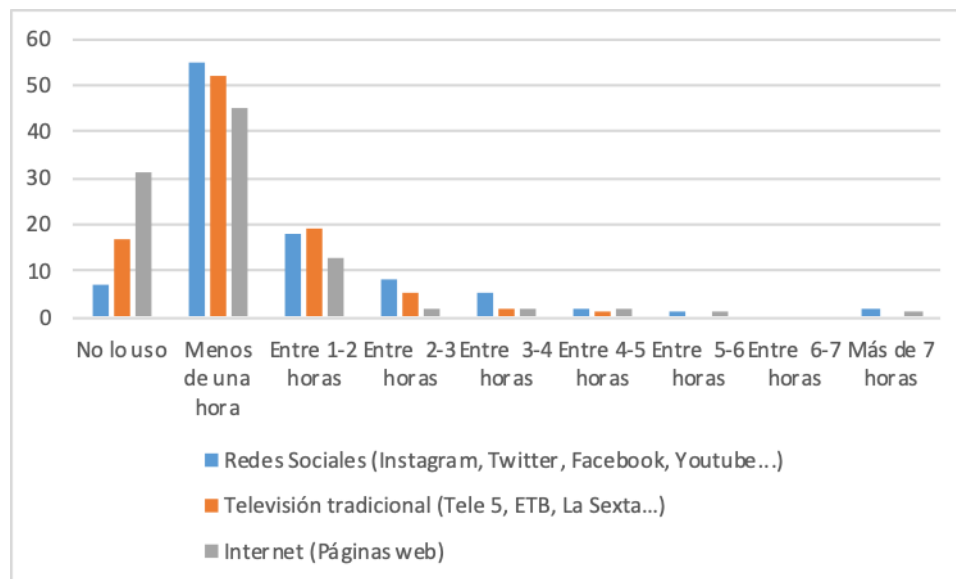
sometime. Although they spend less time on these websites than on other platforms, television and newspaper websites are considered reliable sources of information, as shown below.



Reliability attributed to the different media as sources of information on the coronavirus.

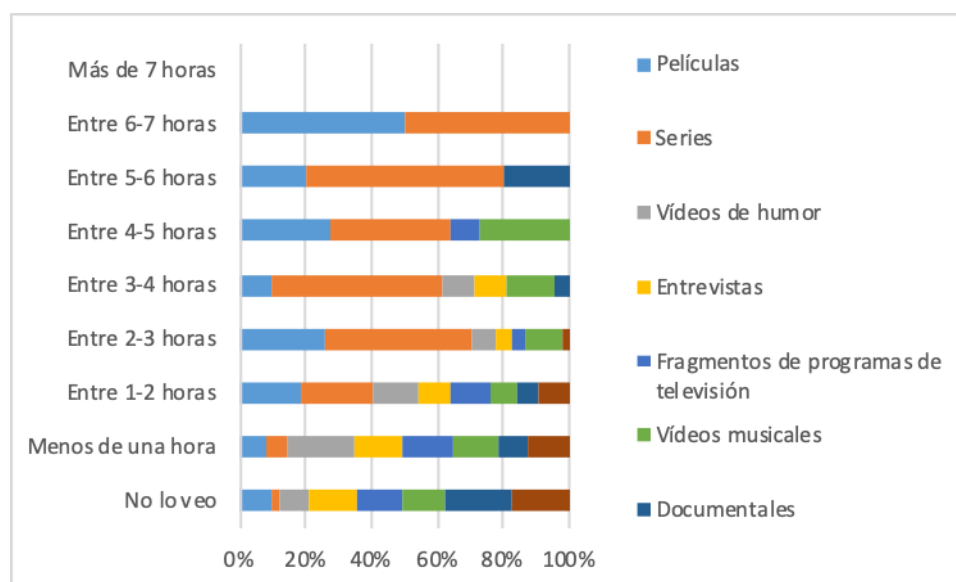
Source: Ikusiker (April 2020).

When asked about the sources of information they consider most reliable, the university students in the panel highlighted traditional television (71%). Among the specific channels that deserve their trust, public channels (ETB2, TVE1 and ETB1) appear at the top of the ranking. This list of television channels considered trustworthy is followed by newspaper websites (50%). This is followed by general Internet websites and radio stations, which obtain similar results among the young panelists, both at around 30%. Despite pointing out that social networks are the least trusted sources of information for them (19%), compared to other options, they recognize that they receive most of the information about COVID 19 through these social networks.



Time dedicated to the different sources of information on coronavirus.
Source: Ikusiker (April 2020).

The traffic of information channeled through social networks is enormous and the agents involved in it are very varied. The networks offer the possibility of receiving information that could never have been obtained in any other way, but also often without the necessary control over the messages that have arrived through the different networks and that have been consumed as they arrived (in point 4.1 we referred to *infodemia*). In any case, it is observed that young people follow with interest the information on the coronavirus, since most of them make it an important part of their daily lives. And they use each and every one of the media and resources available to them, without excluding any of them.



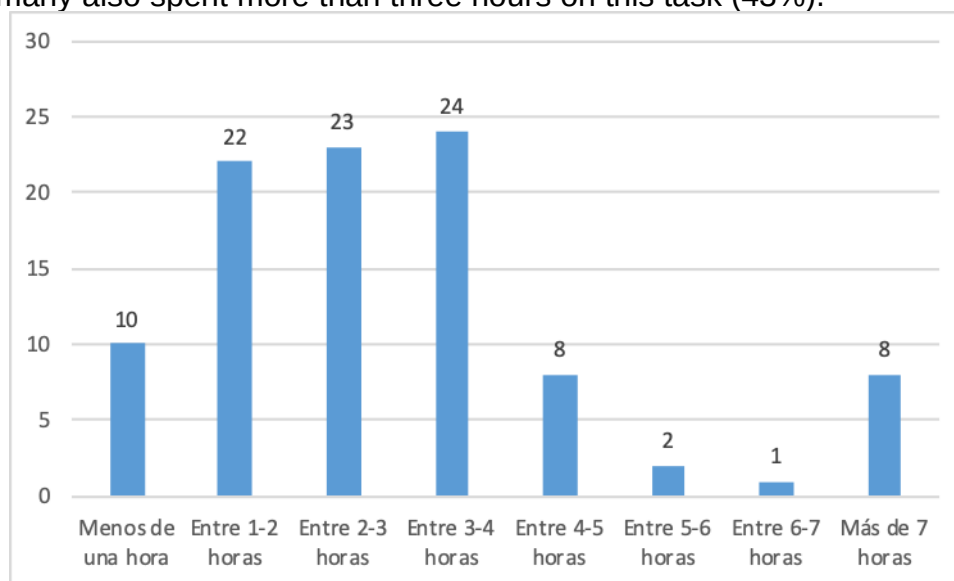
Time dedicated to different entertainment contents.

Source: Ikusiker (April 2020).

The consumption of audiovisual entertainment products is enormous. As can be seen in graph 11, although there are differences between the specific contents chosen by the young panelists, the overall figure is very significant and gives us a sample of the weight it acquires as a whole. The integration of this type of consumption and its hourly dedication has undoubtedly had a great impact on the way in which the panelists have organized their daily day. It remains to be seen whether these trends will continue and will provoke temporary changes in the way young university students use their time.

If we go into the genre of the most watched contents, it is worth highlighting fiction and within it, series. The majority of the more than 700 students who made up the panel acknowledged watching series (89%). And a significant percentage watched movies (77%). If for some time now most entertainment content has been consumed *online*, confinement has only accentuated this trend. "When you want, and as much as you want" could be another of the maxims derived from the questionnaires we have addressed to the young people of the Ikusiker panel, although it also seems to detect some embarrassment in terms of certain consumptions.

On the other hand, as we pointed out earlier, during the confinement, technologies have been allies in the objective of breaking the isolation that home confinement has entailed, and everyone, young and old, have wanted to find the most appropriate way to keep in touch with each other. Thus, it is worth highlighting the amount of time the panelists have spent interacting with friends and family. Among the students, 23% acknowledged spending between 2 and 3 hours a day and 22% between one and two hours, but many also spent more than three hours on this task (43%).



Time spent chatting, talking on the phone, social networks or sharing videos.

Source: Ikusiker (April 2020).

In short, in a context in which the use of information and communication technologies and audiovisual consumption were already enormous, the quarantine caused by COVID-19 established the ideal conditions for increasing and expanding these practices.

To conclude this review of the different aspects of communication that have undergone changes during and as a result of confinement, we would like to highlight the reasons why university students use social networks. Four reasons stand out among these: to keep in touch with family and friends, to stay informed about current events, to hang out and, probably for this last reason, to see funny and amusing things.

Instagram Facebook or Twitter are resources that university students use repeatedly and thus 82% use it always or almost always to be in communication with their acquaintances. Their friends are on social networks (always or almost always in 54% of the responses). But, in addition, this contact also takes the form of the desire to be informed about relevant news. Fifty-three percent of the panelists highlight that reason for always or almost always connecting to social networks and sometime another 33%. "Hanging out" and "seeing fun stuff" are two other highly recurrent reasons. Forty-seven percent and another 41% of the panelists explicitly state these reasons for joining the networks "quite often" or "always" (to which could be added another 17% and 36% who do so "sometime").

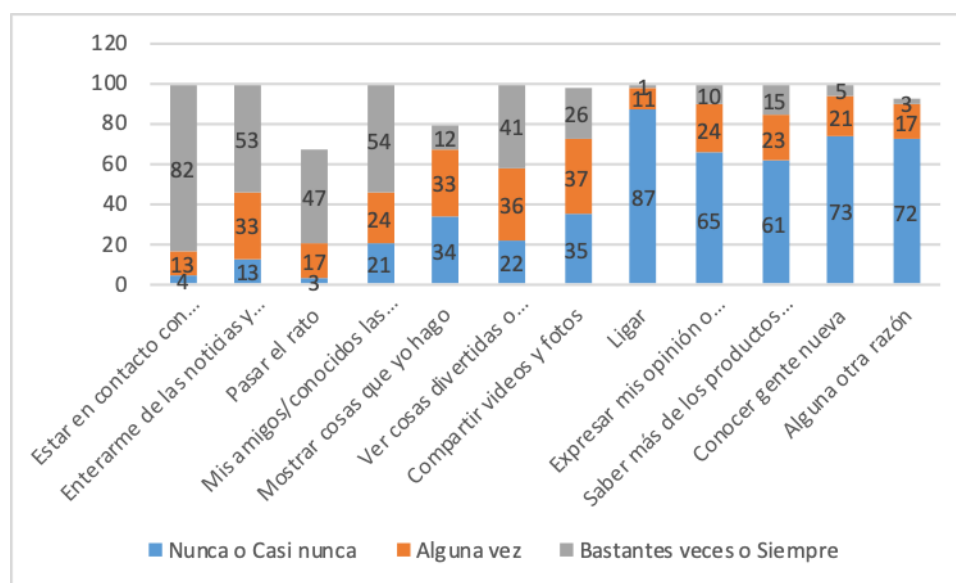


Figure 13. *Reasons for using social networks.*

Source: Ikusiker (April 2020).

So far in this article, we have made a triple journey that goes from the analysis of the situation in very broad geographical and media areas to those closer to home; we have also referred first to general social segments and then to the members of a panel of university students; and yet, although we have focused on the weeks of confinement, we

have also cited previous situations to try to underpin the key elements of the current moment. All this in the belief that, to some extent, the present circumstances are laying the groundwork for what may be the modes and attitudes about communication that are already knocking at the door.

5. GATHERING CLUES

The Coronavirus shook the spring of 2020 and forced the various players to reposition themselves on the new political, economic, social and media game board.

It is difficult to know whether the trends in the communication landscape that have manifested themselves in this initial stage will continue in the future, in a historical moment already dominated by globalization, digitalization and media convergence. However, and even being aware that the day to day will bring more changes and new uncertainties, everything points to the fact that some of the emerging aspects that have manifested themselves in this phase of the COVID-19 crisis will settle and endure over time. The Key Trends 2019-2020 Report (European Audiovisual Observatory, 2020) recently published confirms the upward trend in *online* audiovisual consumption, in relation to those prior to the coronavirus crisis. Subscriptions to VoD services are increasing in Europe, among other parts of the world, and the number of users and viewing time on YouTube is growing.

What will happen as social distancing measures are relaxed? Although strict quarantines are gradually mutating into a new normal, everything points to the fact that in the coming months we will continue to spend more time at home than before the pandemic. Therefore, [ConnectedTV](#), OTT subscriptions and, in general, all kinds of online entertainment options in the home, and on any device, will continue to live their golden age. (Labelium, 2020)

As has been pointed out in the various subsections of this article, during the period of confinement the trend towards hyperconnection became generalized, and in this respect countries as far away as Italy, North Korea, China, Norway, New Zealand and many Latin American countries coincided with each other. Web surfing has thus responded to several needs: the search for news that would help to understand what was going on, to virtually counteract the obligatory social distance and to manage time in a different way. In the first case, this has led citizens to turn to more sources of information and use them for longer periods of time. In the second, both young and old alike have become familiar with or made more extensive use of communication systems, including videoconferencing, to cope with the isolation to which the pandemic inexorably pushed them. But, in addition, many citizens who have lived in isolation at home alone or with their families have begun to create new routines to reorganize their daily lives, taking advantage of all the *online* devices available to them and, in many cases, looking for entertainment.

Some of the issues raised in the initial part of this paper have already been broken down in relation to the communication trends that have emerged worldwide and whether they have occurred in a similar way in the different social and media contexts. The

following section also includes some reflections related to the new communication framework, the roles assumed by the different media and platforms and the new media consumption patterns.

- Technological innovations, those of the computer and telecommunications industry have already combined perfectly with those of the media, creating a new scenario worldwide. The coronavirus crisis has in many cases only accelerated some processes, because many of them had been going on for at least two decades, and, more importantly, has made it easier for it to become embedded in the entire social fabric and through new ICT media consumption habits.
- In this general panorama, the way in which the population materializes communication, why it chooses certain technological supports and the extent to which these satisfy its desires and needs is of great importance. The social appropriation of technology and its devices will continue to be very important issues.
- Until the beginning of the new century, each media had its own and practically exclusive support (paper for newspapers and magazines, airwaves for radio and television), but nowadays the media are multiplatform and content flows through all of them (Jenkins, 2008; Scolari, 2013). Aware of this versatility, corporations work such content by deploying them, above all, through digital media that allow consumption at any time, place and using different devices. Interactivity is also at the basis of digital media.
- The major trends in communication, in terms of production, distribution and consumption, are oriented towards the global and everything indicates that they will prevail over local peculiarities. This is an aspect that must continue to be studied carefully, but the globalizing avalanche is unquestionable and can have very serious consequences in small or medium-sized media markets, with unestablished industries or in socio-political and cultural contexts of a lower economic level. The implications of unbridled globalization could also have devastating consequences for information plurality if communication policies are not designed from a public service perspective (Prado, 2017; Zallo, 2016).
- We are already immersed in the digital era and the healthcare crisis has made this clearer than ever. Digital transformation is no longer an option, but a requirement. And it affects both the media structure and business models, the creation and production of content, its distribution and the way in which the audience accesses and interacts with it. The premise is already: *digital first* (Salaverria, 2019).
- Content (re)conquers its centrality and must satisfy the tastes, desires and needs of the audience. It is, together with accessibility, a key element that guides the whole process and must allow the user to enjoy it from any device and at the chosen time. Otherwise, content could get lost in a catalog with no limits in terms of subject matter or format and no localization keys.
- The coronavirus crisis has led to an unprecedented growth in the population's media consumption. One of the first consequences has been an increase in the time devoted to information, but the various reports also reveal substantial differences by demographic segment: young people opt primarily for *online media* (and social networks) as their first source of information, while older people stick to traditional television. In any case, and in general, the pandemic has shown that

there is a structural leap towards digital consumption, and that young people have been leading the way for some time (Kantar Media, 2020; Barlovento, 2020).

- Among the languages of communication, the audiovisual component is gaining in importance. Audiovisuals are used to receive information, to exchange content and even for interpersonal communication.

In the field of communication, the same circumstances rarely repeat themselves and the current scenario is also very changeable. To speak of a "return to normality" does not seem to make much sense when the rules of the game, the approaches and the balances between the different players in the current media ecosystem are already different. The door to new developments remains as open now as it was in the spring of 2020.

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