Evolution of Television Consumption in Spain since the Digital Switchover: Turning Points and Changes in Trends

Nadia Alonso López
[naallo1@har.upv.es]
Universitat Politècnica de València

Recived: 12-07-2017
Accepted: 30-11-2017

Abstract

With the DTT re-launch in Spain in 2005 there was a progressive rise in television consumption, which reached a historic high in 2012 at 246 minutes per person per day. The reasons for this increase can be found in factors like the proliferation of new channels that accompanied DTT switchover, as well as the spike in unemployment resulting from the recession and the consequent increase in leisure time. Since 2012, however, the time the Spanish spend watching linear television has fallen, to 230 minutes per person per day in 2016. In this article, I examine the variables that have influenced this change in trend and its impact on questions such as advertising investment, using a descriptive-analytical method based on television industry studies by GECA and Barvolento, reports by Spain's National Statistics Institute (INE) and Infoadex, and the weather summaries published by the State Meteorological Agency (AEMET), as well as a consideration of the relevant literature and various websites. I thus explore how the economic situation, the homogenisation of television content, and weather conditions have influenced the fall in TV consumption, although television still holds a dominant position in the media ecosystem today.

Key Words: Television, DTT, programming, television consumption, crisis.

Resumen

Con el relanzamiento de la TDT en España en 2005 se produce un aumento progresivo del consumo televisivo que alcanza su máximo histórico en 2012 con 246 minutos por persona y día. Las razones podemos buscarlas en factores como la proliferación de canales que trajo consigo la TDT y la crisis económica que comporta un aumento del paro y el consiguiente incremento del tiempo libre. Sin embargo, a partir de 2012 desciende el tiempo que dedicamos a ver televisión lineal hasta 230 minutos por persona y día en 2016. En este artículo estudiamos las variables que han influido en ese cambio de tendencia y la influencia en cuestiones como la inversión publicitaria a través de una metodología analítico-descriptiva basada en los análisis televisivos de GECA y Barlovento, informes del INE e Infoadex y los resúmenes climatológicos de la AEMET, además de la consulta de bibliografía y diversas páginas web. Comprobaremos cómo la coyuntura económica, la homogeneización de la programación televisiva y la climatología influyen en el descenso del consumo televisivo, aunque la televisión mantiene su preeminencia en el ecosistema mediático actual.

Palabras clave: Televisión, TDT, programación, consumo televisivo, crisis.

Summary: 1. Introduction. 2. Evolution of television consumption: a change of habit. 2.1 The economic situation and television consumption. 2.2 Homogenisation of television programming. 2.2.1. Lack of originality in programming offered. 2.3 Weather and television consumption. 3. Conclusions. Bibliography

1. Introduction

The first turning point examined in this research, and which serves as its starting point, is the year 2005. It was in this year that two key events occurred in Spain's media ecosystem that directly affected the television industry. Indeed, authors like López Villanueva (2011: 23) identify 2005 as a year of such importance that it represents a change of «era», from *narrowcasting* to *webcasting*. The first of these events was the DTT re-launch in Spain. The National Technical Plan for Digital Terrestrial Television was approved under Royal Decree 944/2005 of 29 July, which came into effect on 1 August 2005. DTT represented a revolution in television reception and viewing that authors like Lafrance (1999: 283) had already foreseen, suggesting that its impact would be even greater than that of the dawn of colour television. Broadly speaking, it constituted a new model of free-to-air television based on advertising revenue accessible to anyone with a converter box and a suitably adapted TV set and antenna. The digitalisation of the television signal resulted in a proliferation of channels: by 2006, Spain had 20 free-to-air channels (Ministerio de Energía), with the consequent increase in television viewing options. It is important to note that this trend in the first years of DTT would be inverted with the reorganisation of channels into large media groups, underpinned by an economic and political context that was favourable to these «communications groups taking over the Spanish television industry», contributing to a «reduction in the impact of public policy on the media industry» (Marzal and Casero, 2009: 101). Nevertheless, DTT was here to stay, changing the way we watch television in a manner similar to what happened in the 1980s in Europe with deregulation and the entry of private initiative into the television industry, breaking the public television monopoly in what Eco (1985) referred to as the move from Paleo-Television to Neo-Television. One of the consequences of the arrival of DTT was the rise in linear television consumption due to the popular appeal of the new channels and their programming. This consumption increased more substantially from 2010 —the year of the analogue switch-off in Spain— to 2012.

The other significant event that took place in 2005 was the birth of YouTube. Although television continues to be the hegemonic medium, video has become a pillar of the audiovisual sector thanks to this platform, which allows users to upload and share their own series of images online. This is precisely the basis of the change that YouTube represents: to offer users the chance to become content creators and to go beyond the role of mere consumers. According to its own statistics, YouTube now has more than 1 billion viewers. In Spain, according to data from the General Media Study, it is the most widely-used website for sharing and viewing videos and images. Moreover, it has recently announced a new television service —YouTube TV— which will offer paid content and access to generalist channels. YouTube TV will also allow viewers to record content and store it in the cloud for asynchronous viewing (Majó, 2011: 76). It is not an objective of this study to compare the YouTube phenomenon to television; however, it is worth highlighting its significance here in «at least a couple of respects that are far from minor. First, that internet content is becoming increasingly audiovisual. And second, that the internet user is increasingly becoming a content producer and consumer on the web» (Llorca, 2015: 98).

Thus, since 2005 we can see how the digitalisation of the television signal and the rise of YouTube have marked a change to the traditional model towards *webcasting*, which can be identified as occurring over the past twelve years, from 2005 to 2017. López Villanueva (2011: 21ff.) places this model in the third generation of television, based on internet and mobile platforms that facilitate customisation of consumption, control of the content viewed, and asynchronous consumption, free of the schedules, advertising and programming predetermined by television networks. This change opens up new possibilities for «seeing whatever you want, whenever you want, however you want and wherever you want on the multiple interactive devices that can be connected to the Internet and to the DTT signal at the same time» (Vaca, 2015: 149).

In this context, I propose here to analyse what is happening to linear television consumption and how it is evolving. This mode of consumption continues to be the main target of TV advertising investment given that, as things stand today, it is the only mode in Spain with official audience ratings, measured by Kantar Media, at least until the arrival of the much-vaunted cross-media audience measurement, which will register television consumption on other types of devices. Recently, there have been two significant advances in the field of audience measurement in Spain. In 2015, Kantar Media began reporting data on time-shifted consumption, i.e., programming that the viewer records and views on television some time after it was broadcast. In 2015 and 2016, this form of non-linear consumption time amounted to three minutes per person per day. More significant, in view of its higher levels, is the measurement of television consumption by guest viewers, i.e., «viewers who do not reside in the household where the content is viewed» (Barlovento). March 2017 was the first month for which this data was reported, with a result of 13 minutes per person per day; that is, 5% of total television consumption. We will have to wait until the end of 2017 for a global assessment, but this measurement will no doubt contribute new perspectives to research into television consumption and audience measurement, in addition to influencing the television and advertising industries. For now, according to the figures for 2016 provided by Infoadex, advertising investment in television has increased by 6.2%. However, the data examined here show that linear television consumption has decreased by 16 minutes over the last four years, after reaching its historic peak, in 2012, of 246 minutes of television consumption per person per day (Kantar Media).

This study focuses on elucidating the reasons for this downward trend in television consumption and its consequences for the television industry and advertising investment, without losing sight of the contemporary media ecosystem in which linear television coexists with the new forms of audiovisual consumption. To this end, a descriptive-analytical method has been adopted, drawing on television industry studies by GECA and Barlovento, reports by Spain's National Statistics Institute (INE) and Infoadex, and the weather summaries published by the State Meteorological Agency (AEMET), as well as a consideration of the relevant literature and of websites like that of Spain's Ministry of Energy, Tourism and Digital Agenda.

2. Evolution of television consumption: a change of habit

As noted above, the introduction of DTT brought with it a proliferation of channels and, at the same time, an increase in television consumption. This trend was inverted after 2012, with an historic low in television consumption being reached in 2016. From 2005 to 2012, the number of minutes viewed per person per day increased by 29, while from 2012 to 2016, linear consumption fell by 16 minutes. It is also worth noting the Supreme Court ruling in December 2012 that ordered the closure in 2014 of new channels that had been awarded without a public tendering process. This had a negative impact on television consumption, which fell by five minutes compared to 2013. Added to this was the growing weariness of viewers with increasingly unoriginal television programming. At the same time, from 2007 on, the recession pushed advertising investments down and media groups reduced their investments in new, original, quality formats, instead opting mainly for rebroadcasts. Moreover, new devices have given access to television content on non-television screens. The consequence of all this has been a drop in the number of minutes we spend in front of the TV. This situation is represented in Figure 1.

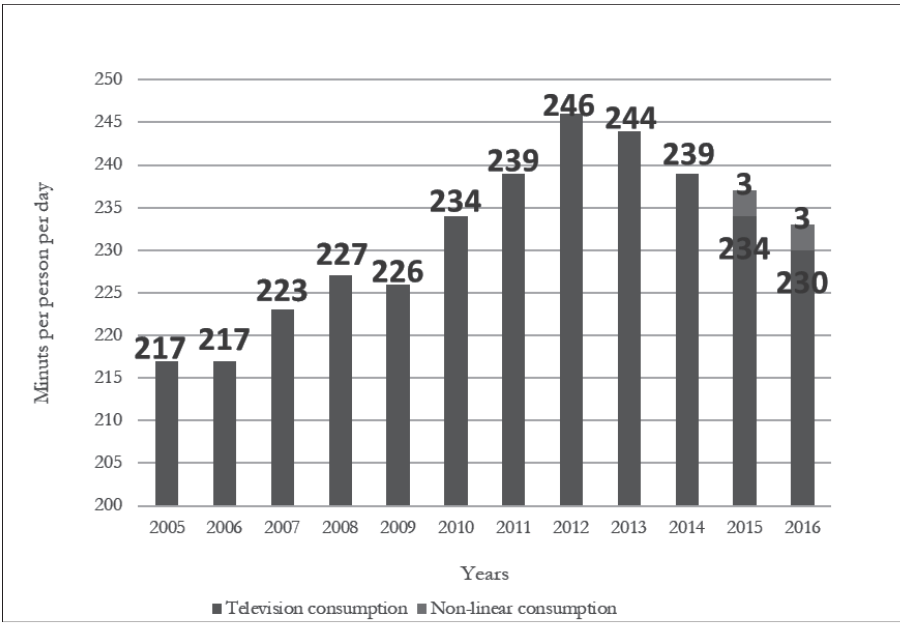
The above graph also shows 3 additional minutes in the time dedicated to watching television in 2015 and 2016 corresponding to non-linear consumption.

The reasons for the decline in television consumption are explored below.

2.1. The economic situation and television consumption

The economic situation is reflected in television consumption. This is clear from the analysis conducted for this research, which follows on from an article published in 2014 (Alonso, 2014). According to that article, the recession as a contextual factor contributed to a historic high in linear television viewing in 2012, boosted by the increase in unemployment. In parallel with this, advertising investment fell, reaching its lowest figure in the last ten years in 2013. with just over 1.7 million euros invested in television advertising (Infoadex). At the same time, in a move influenced by the unfavourable economic situation, TV channels were merged to form part of large media groups, clearly for the purposes of profitability: seeking to increase audience numbers in order to generate higher

Figure 1. Evolution of Television Consumption 2005-2016.



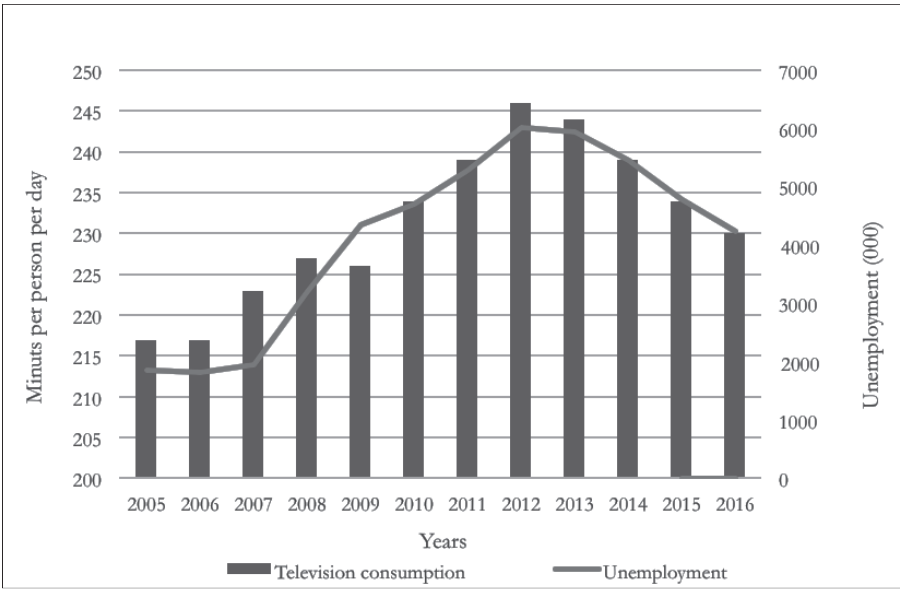
Source: Kantar Media. Prepared by author.

revenues, with no concern in most cases for educational or social objectives. As a result, the trend was inverted and there occurred a process of concentration of the Spanish television sector into two media groups: Mediaset and Atresmedia. It was from 2009, according to various authors (Francés, 2014; García-Santamaría, 2013), that this process began, boosted by the elimination of advertising on TVE on 1 January 2010, which has transferred advertising funds to the private networks and has not resulted in an increase in plurality (García-Santamaría and Fernández Beaumont, 2011; Francés, 2011, Gavaldà, 2011).

The aforementioned article thus analysed how television consumption had increased since 2006 in the wake of the rise in unemployment, in a context of economic crisis and recession. In 2013, the economic recovery began and television consumption saw a notable drop that would continue in the following years, in parallel with the decreasing unemployment figures.

Moreover, unemployment increased more markedly among men than among women, as did the time that males dedicated to watching television, which rose by a higher percentage than viewing time among females. In fact, men went from watching an average of 198 minutes of television a day in 2005 to 233 minutes in 2012 (GECA). In other words, they were watching 35 minutes more television a day than they had seven years earlier. In the case of women, the increase was from 236 minutes a day in 2005 to 258 minutes in 2012, representing a rise over the same period of 22 minutes. Over this period, television consumption on weekdays also increased, as did the morning time slot, by two to four points.

Figure 2. Evolution of Television Consumption 2005-2016.



Source: GECA and INE. Prepared by author.

As noted above, since 2012 this upward trend has been inverted. This inversion can be seen in figure 2, which shows clearly how the number of minutes viewers are spending in front of the TV each day has fallen in parallel with the reduction in the number of unemployed persons since 2012, when television consumption was at 246 minutes per person per day and unemployment was at over six million. By the end of 2013, the unemployment figure had fallen to 5,935,000, while television consumption had dropped by four minutes this year. From 2012 to 2016, the number of unemployed fell by 1,784,000 and television consumption fell by 16 minutes, even taking into account the number of minutes of time-shifted consumption which, as noted previously, was not measured in 2012.

If we focus on the question of television consumption by gender, we find that, over the past four years, the amount of time that men spend watching television each day has fallen by 14 minutes, to 219 minutes in 2016, while among women, the decrease is 11 minutes, to 247 minutes of television consumption per day. A clear correspondence can be identified between these data and male and female unemployment, which fell by a percentage similar to that of television consumption for each gender.

Therefore, while the recession itself and the increase in unemployment provoked an increase in television viewing (Vaca, 2015: 160), the economic recovery and the decrease in the jobless rate have had the opposite effect: we now have more work, and less time to watch television. The turning point came in 2012, when the GDP began to turn around, leading to four years of growth.

2.2. Homogenisation of television programming

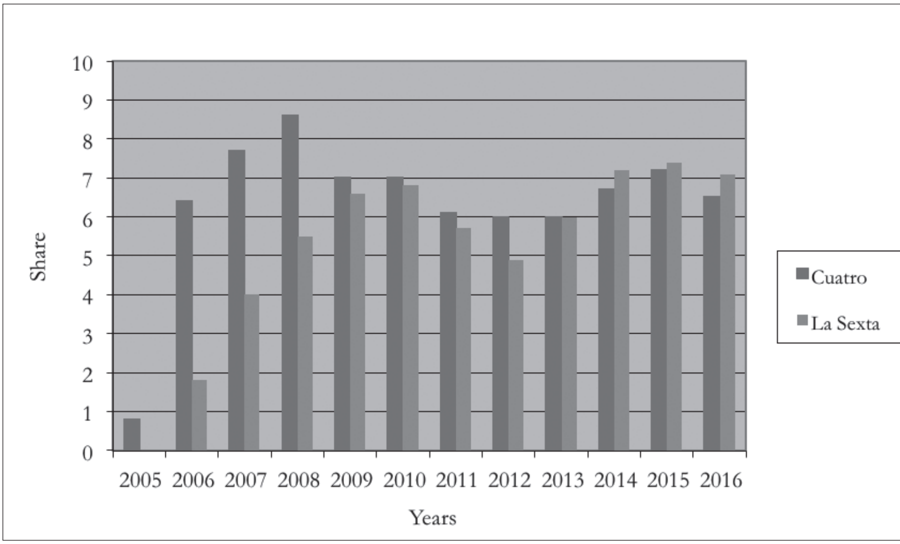
The arrival of DTT led to an unprecedented proliferation of free-to-air channels. This change gave rise to expectations of greater diversity in programming. But instead, the opposite occurred. Far from changing the programming model, the analogue television model was transposed to the digital context, effectively confirming the conservative and mercantile nature of the television industry, which has the objective of attaining the biggest profits possible in the shortest possible time (Marzal and Casero, 2008: 94). Added to this innate tendency was an unfavourable economic context beginning in 2007, which restrained investment in new formats, as networks opted instead to economise by rebroadcasting existing series and programs, as discussed below.

In 2006, one year after the DTT re-launch, seven new digital channels began broadcasting: first, the five new stations operated by TVE, and then two private digital channels. Their programming focused on fiction, sports, music shows and entertainment. Even at this time, analysts criticised the large number of repeats and the incomplete broadcasting schedules with only a few hours a day (Bustamante, 2013: 242). Indeed, the content of networks like Telecinco Estrellas (later renamed Factoría de Ficción), Antena Nova or Antena Neox was based on fiction and entertainment series previously broadcast on the main channel, with barely any original programming. Audiences for these channels created in the context of the DTT switchover were residual compared to the generalist networks. In 2006, according to data gathered by Kantar Media, TVE's La 1 channel finished the year with an audience share of 18.3% and La 2 with 5.8%, while Canal 24 horas, Teledeporte, Canal 50 Años and Canal Ciudadano barely achieved 0.1%. In the Antena 3 TV group, Antena 3 ended 2006 with a 19.4% share, while Nova and Neox finished the year with 0.1%. A similar phenomenon occurred with Telecinco, with a 21.2% share for the main channel and barely 0.1% for Telecinco Estrellas and Telecinco Sport. In the Sogecable group, Cuatro secured a share of 6.4% in its first year of life, but CNN+ and 40 Latino had negligible viewer numbers. As for the other networks, La Sexta rated at 1.8% in 2006, while neither Net TV nor Veo TV achieved an annual average of even 0.1%. This trend continued in subsequent years, when some of these channels disappeared and others changed their names, as will be discussed below.

This moment of the DTT re-launch marked the arrival onto the scene of the television networks Cuatro and La Sexta. These two channels began broadcasting in 2005 and 2006 respectively, and their audience share grew from less than 2% in their first years to stabilise at around 7% a decade later. Cuatro enjoyed a faster rate of growth than La Sexta due to the fact that it took over the signal used by Canal+ to broadcast its programming. La Sexta, on the other hand, had to invest significantly in marketing and communications to raise awareness of the new TV brand among viewers (Vaca, 2010: 122).

As shown in figure 3, Cuatro achieved its highest audience share in 2008, with 8.6%. The network had begun broadcasting with programming focused on entertainment and fiction, with several series in the morning, afternoon and prime time slots with formats taken from Canal+ like *Channel número 4*, *Marac-*

Figure 3. Evolution of Audience Share for Cuatro and La Sexta (2005-2016).



Source: Kantar Media. Prepared by author.

aná 06 and *El guiñol de Canal+*. It also screened children's shows and current affairs programs like *1 Equipo*. Later, series like *House*, broadcast in the prime-time slot, would raise the network's average audience share. In fact, in February 2008, *House* took a share of 17.6% (Kantar Media) for the first episode of its new season. It was precisely from this year on that Cuatro's audience numbers began to decline, and they would not recover until 2014, although since then they have been lower than those of La Sexta. Moreover, since the merger of Telecinco and Cuatro in 2009, Cuatro has undergone a shift in its programming, with more importance given to fiction and even rebroadcasting series that had previously appeared on Telecinco.

La Sexta, on the other hand, began broadcasting with a focus on fiction and entertainment, while in the last three years it has turned to programming centred more on information and analysis with programs like *La Sexta Noche* or *El Objetivo*, which differentiate it from other generalist networks.

Meanwhile, with the analogue switch-off in 2010 new multiplex licences were granted that allowed for the establishment of new channels. However, the number of channels available grew faster than production capacity, and specialty channel schedules were thus based on the same dominant macrogenres used in generalist schedules, resulting in very little diversification in television programming (Prado, 2002).

Below I will analyse the programming of the channels offered to audiences between 2010 and 2014 (the year when nine of these channels were shut down by a Supreme Court ruling) and the channels offered today. This analysis effectively shows a decline in the quality and quantity of programming offered.

2.2.1. Lack of originality in programming offered

The detailed analysis begins with Spain's public broadcasting corporation, RTVE. As shown in Table 1, its specialty programming offers information, sports, and children's programs. It also shows that its audience share last year was 0.9%, except for Clan, which is Spain's top channel with young viewers. The programming offered complements that of the generalist channels, with specific content for a particular target audience, such as children.

Table 1. Programming on RTVE free-to-air specialty channels in 2017.

Channel	Content	Audience share in 2016
24h	News and information programs	0,9%
tdp	Sports, rebroadcasts of games and sports programs	0,9%
clan	Children's and youth programs and series	2,2 %

Source: Ministry of Energy and Barvolento Comunicación. Prepared by author.

In the case of La 1, the inclusion in its schedule of programs like *España directo* or *Los desayunos* reflects a predominance of information programming over entertainment and fiction. On La 2, cultural programs predominate.

Table 2 details the programming offered by Atresmedia on the networks established in the wake of the DTT switchover, reflecting that series and program rebroadcasts make up the main content.

Table 2. Programming on Atresmedia free-to-air specialty channels in 2017.

Channel	Content	Audience share in 2016
neox	Program and series rebroadcasts, documentaries	2,5%
nova	Telenovelas, series rebroadcasts, cooking programs, US series…	2,2%
A3S ATRESERIES	Rebroadcasts of Atresmedia group series, especially comedies	0,8%
MEGA	Series, documentaries, rebroadcasts of Atresmedia group programs	1,8%

Source: Ministry of Energy and Barvolento Comunicación. Prepared by author.

This lack of original content on specialty channels is nothing new. The channels of the Atresmedia group that were legally required to stop broadcasting on May 6, 2014 also based their programming on rebroadcasts and repeats of content previously broadcast on the group's generalist channels. The channels concerned were Nitro, La Sexta 3 and Xplora. Nitro offered programming with rebroadcasts of programs like *Salvados,* US series like *Walker: Texas Ranger* and *Without a Trace,* and a few sports programs like *El chiringuito de jugones.* Meanwhile, La Sexta 3 was dedicated entirely to films, although initially its programming was mostly fiction series. Finally, the programming on Xplora (previously La Sexta 2) was comprised of documentaries. All three had audience shares of around 1.5% when they were shut down.

Table 3 below shows the programming on the specialty channels of the Mediaset group. The first channel in the table is Factoría de Ficción, whose programming is based mainly on series that were previously broadcast by the Mediaset group and that achieved high ratings, such as *La que se avecina* or *Los Serrano.* There is also some self-produced content that has not had much success with audiences. It is worth noting that this channel is the leader among DTT free-to-air specialty channels, with an audience share last year of 3.2%, a figure 0.7% higher than Neox, which is in second place.

Boing, like Clan and Disney Channel, is targeted at children and youth audiences. Its schedule includes cartoons and series, as well as repeats of programs like *La Voz Kids.*

Table 3. Programming on Mediaset free-to-air specialty channels in 2017.

Channel	Content	Audience share in 2016
F.	Rebroadcasts of Mediaset group series and some self-produced content	3,2%
BOING	Programs and series for children and youth; program rebroadcasts	1,5%
d.	Series repeats, films and entertainment news programs	2,3%
E.	Series, sports, documentaries and films	1,9%
BE MAD	Documentaries, programs, reality shows	0,4%

Source: Ministry of Energy and Barvolento Comunicación. Prepared by author.

Targeting adult audiences, Divinity offers programming centred largely on entertainment news, the most notable example being the program *Cazamariposas*. Also included in its schedule are summaries of reality shows broadcast on Telecinco and Cuatro at that time, the successive editions of *Gran Hermano* (*Big Brother*) being a paradigmatic example, and regular repeats of US series like *Castle* and *Ghost Whisperer.* The next channel in the table, Energy, began with

Table 4. Programming in 2017 on the other networks that received the last DTT free-to-air licences.

Channel	Content	Audience share in 2016
Disney Channel	Children's and youth programs and series	1,1%
Paramount Channel	Films and series	1,8%
DMAX	Docu-reality shows, programs on a range of topics, documentaries…	1,9%
13tv	Generalist channel with a percentage of religious content	2,1%
DKISS	Programming based on reality and docu-reality shows	0,4%
ten	Generalist channel with self-produced content	0,3%
Realmadrid TV	Information and sports programs related to the Real Madrid football team	0,2%

Source: Ministry of Energy and Barvolento Comunicación. Prepared by author.

programming that included films, sports and documentaries, and then shifted to a schedule based on fiction productions. Among these are repeats of US series like *Smallville* or *CSI* and Spanish fiction shows like *MIR*. Finally, Be Mad, which began broadcasting in 2016, mainly offers docu-reality shows and programs originally broadcast on other channels in the Mediaset group, like *Frank de la Jungla*.

We thus see a repetition of the pattern identified above with Atresmedia, with very little original content on specialty channels in the Mediaset group. This same pattern could also be found in the Mediaset channels that went off the air in May 2014 following the Supreme Court ruling: Nueve and La Siete. Nueve offered programming with repeats of different series and programs, as well as live connections with the reality show *Gran Hermano*. The channel's audience share was less than 1% throughout its existence. La Siete was the new name of Telecinco 2, which, in turn, replaced Telecinco Sport. It began broadcasting in 2009 with repeats of series, telenovelas and summaries of the reality show *Gran Hermano*, as well as the occasional self-produced programming with formats copied from other successful productions on the Mediaset group's generalist channels. One example of this was the talent show *El Manager*, which had limited success with audiences.

The programming of the other channels that have been broadcasting free-to-air since the last DTT licences were granted are examined below.

Disney Channel is the third free-to-air channel targeting the child and youth market. As its name suggests, it broadcasts content produced by the Disney factory. Its programming combines contemporary series and programs with cartoons featuring classic Disney characters. It is the children's channel with the lowest audience share.

Paramount Channel, like Disney Channel, broadcasts on the DTT frequencies granted to Net TV. Its content is based on films and series produced by the major US studio Paramount. Its schedule also includes programs related to films and humour, like the analysis of films presented by the comedian Berto Romero. According to its own statistics, it broadcasts more than 600 films a year, as well as fiction programs. However, despite the quality of some of its titles, its audience share in 2016 fell by two decimal points to 1.8%.

DMax began broadcasting in 2012 under the name Discovery Max. Its programming is currently centred on documentaries, docu-reality shows and documentary series dealing with a wide range of topics, such as travel, adventure, nature, history, and motor racing. Most of its content consists of US imports dubbed in a way that allows viewers to hear the original sound. On certain occasions its programming has included sports rebroadcasts, which have lifted its average audience share; nevertheless, its share fell by two decimal points in 2016, to 1.9%.

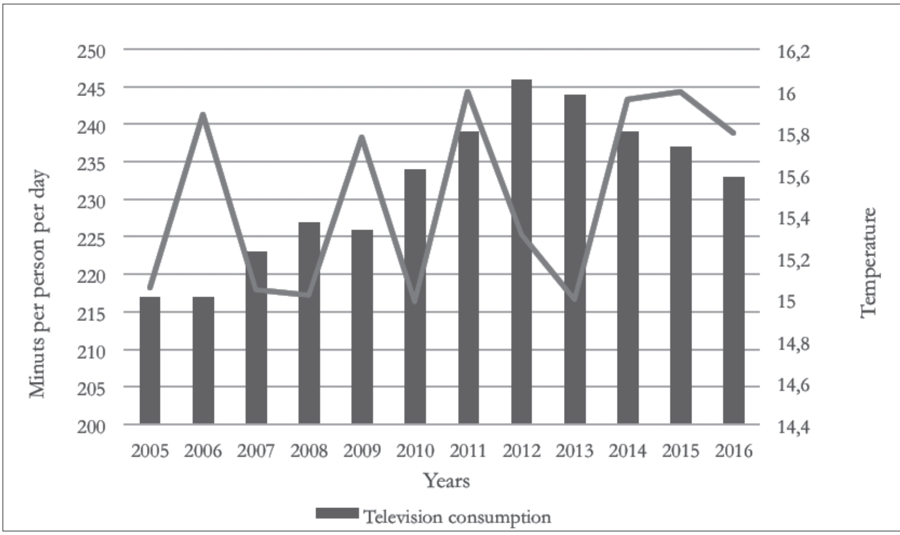
Channel 13TV has been broadcasting since 2010 on the DDT frequency granted to Unidad Editorial. What distinguishes this channel from other networks is the fact that it offers a percentage of religious programming due to the fact that its main shareholder is the Spanish Episcopal Conference. In the last awards of DDT licences, it was granted a frequency on which it mostly broadcasts films, news and current affairs programs, in addition to its religious programming. 13TV is classified as a generalist network (Ministerio de Energía), and as such it follows the programming criteria of the other generalists: a morning magazine show with current affairs content and a presenter familiar to audiences, debates on current topics and investigative pieces. Of the networks granted the most recent licences from the government, it is the one with the largest audience share.

DKiss bases it programming on formats imported mainly from the US and the UK. The main television genre on this channel is the reality and docu-reality show, with programs like *Adelgaza como puedas, Cuerpos embarazosos* and *Menuda familia.* Its self-produced content is therefore limited as it relies on programs with minimal originality and content previously broadcast outside Spain. It is one of the free-to-air channels with the lowest audience shares.

The Ten channel, owned by the Secuoya Group, introduced new programming at the end of March with a number of spaces for self-produced content, including an evening magazine show on fashion and new trends, a cooking program, and a self-help show (Costa, 2010: 5). Although this change has been publicised as a «revolution», the formats offer little in the way of originality compared to programs broadcast on other networks.

Finally, Real Madrid TV received a licence to broadcast in HD. Of all the channels operating free-to-air in Spain, it is the channel with the lowest audience share. Its programming is focused on football and on sports information related to the Real Madrid football team.

Figure 4. Evolution of television consumption and temperatures in Spain (2005-2016).



Source: AEMET and Barlovento Comunicación. Prepared by author.

From the analysis above we can identify a number of patterns that I will discuss in more general terms in the conclusions. In particular, it is clear that in recent years there has been a progressive reduction in the quality and quantity of programming content. While in the first few years the larger number of new channels appearing with the DTT re-launch entailed a rise in consumption time and increased loyalty to the television medium (Vaca, 2015b: 159ff.), this trend has been inverted in the last few years. The channels created as a result of the DTT switchover offer imported programs, films, rebroadcasts of series and programs, reality shows and content that is essentially a reformulation of pre-existing productions, all of which has been homogenised even more —if that were possible— by the sensationalising of formats that is clearly evident in the case of news and information content (Díaz Nosty, 2006: 22). This trend towards increasingly hackneyed content has been observable for a number of years.

2.3. Weather and television consumption

As a third factor, the weather also can be shown to have an influence on television consumption. Indeed, it is clear that there is a direct relationship between the season and the amount of time we spend in front of the TV. As reflected in the television analysis reports issued by GECA and Barlovento using data from Kantar Media, January and February are the months with the highest levels of television consumption in the year, mainly because they are the coldest. It is thus also possible to establish a relationship between periods of warmer temperatures and lower average precipitation in recent years and lower rates of television viewing.

According to reports by the State Meteorological Agency (AEMET), between 2005 and 2016 the average temperature rose by approximately one degree, with 2011 and 2015 being the hottest years on record in Spain. The average temperature in Spain for these two years was 16º.

As shown in figure 4, average annual temperatures in the last few years have hovered around the 16º mark. In 2012, the year with the highest level of television consumption, the average temperature was approximately 0.7º cooler than the previous year. In particular, the month of February 2012 was classified by AEMET as extremely cold, with an average temperature of only 6 degrees.

It is also worthy of note that February 2012 set a monthly record for television consumption, with an average of 267 minutes per person per day (Barolvento). Conversely, 2016 had one of the warmest Februaries in recent years, with an average of 9.3º. In that month of February 2016, average television consumption was 251 minutes, 12 minutes less than February 2015 and 16 minutes less than February 2012. The average annual temperature in 2016 was 15.8º, half a degree higher than in 2012.

In terms of precipitation, according to AEMET data, 2015 and 2016 were dry years, with 23% less rain than normal. Although these are different variables, it is striking to note that these are also the years in which television consumption saw a progressive decline.

In view of the data, it is possible to connect these two parameters, television consumption and weather, given that the time we spend watching television is closely associated with out leisure time. If the weather is on our side, that is, if it rains less and the temperatures are milder, we are more inclined to go out and devote more time to outdoor activities. This is time taken away from television consumption.

3. Conclusions

After six years of rising television consumption in Spain due to factors like the proliferation of channels resulting from the DDT switchover and increased unemployment, from 2012 to 2016 there was a steady decline in the number of minutes we spend in front of the TV for reasons which, curiously, are related to the same factors that caused increased consumption following the arrival of DTT. First of all, the recession was a contextual element that influenced the rise in television viewing in recent years. However, for four years starting in 2012, Spain's GDP grew steadily and unemployment decreased. As the economic recovery kicked in, we began working more and had less time to watch television. Similarly, the warmer and drier winters of recent years encouraged viewers to spend more time outdoors and less time at home in front of the TV set, which continues to occupy a privileged place in the living room (González Requena, 1989: 99-101) despite the proliferation of devices and the consequent individualisation of television consumption, which was 48% in 2016 (Barlovento). These devices make it possible to access television content on screens other than the TV screen and allow asynchronous viewing, which also take minutes away from traditional consumption.

Warranting separate mention is the progressive decrease in the specific value of television programming, and the consequent loss of interest in television content among viewers, whose expectations with the appearance of so many new channels have been knocked down by programming based on rebroadcasts and formats lacking in originality. The big media groups in Spain —Mediaset and Atresmedia— have chosen to migrate hackneyed content to their DTT specialty channels (Francés, 2014: 122ff.), which base most of their programming on repeats due largely to an unfavourable economic context and a decline in advertising investment that has had a knock-on effect on investment in new formats. Similarly, the networks granted new DTT licences in 2015 are repositories for reality and docu-reality shows, most of them imported, along with rebroadcasts of films and series originally aired on other generalist channels, and when they do produce programming of their own, it is notably lacking in originality. Specific examples of this are cooking programs, self-help shows, magazine shows and current affairs or investigative programs. There has also been a sensationalising of television discourse and of different formats such as news programs and competition shows, as noted previously by various authors (Díaz Nosty, 2006; González Requena, 1992), and the predominance of entertainment programs as the biggest macrogenre on television. As a result, viewers are offered very little variety in programming in general and in self-produced formats in particular, which are homogenised to conform to the logic of the spectacle. In short, the programming is presented as a big spectacle aimed at catching the attention of the viewer (González Requena, Martín Arias, 1994: 6).

With respect to the above, it is worth highlighting that, in parallel with the decline in television consumption, there has been a fragmentation of viewer audiences. Generalist television progressively lost its audience share after 2005 to channels established since digitalisation. However, since 2012, it has recovered its audience share, finishing 2016 with 37.3%. Among other factors, this change is related to the aforementioned homogenisation of content on the channels established in the context of the DTT switchover.

Nevertheless, and despite the decline in consumption, traditional television continues to be the most popular option for users, who spend around four hours per day watching linear television. TV viewing continues to be the activity that we devote more time to after working and sleeping, with four hours representing 16% of the day (Barlovento), and it is the most influential medium in today's media ecosystem. Indeed, television is the medium with the biggest business volume for advertising investment, which has recovered since the recession, rising in 2014 to 1.8904 billion euros, compared to 1.7034 billion euros the year before, and reaching 2.1 billion euros in 2016. In considering these figures, it is important to keep new measurements for linear television consumption in mind, such as guest consumption.

To this it could be added that within the contemporary media ecosystem described in the introduction to this article, «the emergence and consolidation of YouTube, and all other websites that can store videos and audiovisual content, facilitate and contribute to increasing television viewing every day» (Vaca, 2015: 16). This opens up future lines of research that will no longer speak of television consumption but of audiovisual consumption, in which television content will be significant, but from perspectives other than traditional television. Contributing greatly to such research will be the new and much-vaunted cross-media audience measurement, which will be able to respond to the contemporary reality of multimedia and multi-device consumption.

Bibliography

Agencia Estatal de Meteorología, Resúmenes climatológicos. España (2005-2016). Recuperados de: http://www.aemet.es/es/serviciosclimaticos/vigilancia_clima/resumenes

Alonso, Nadia (2016): Del *broadcasting* al *webcasting*. Evolución del consumo televisivo en España desde el encendido digital. (Tesis doctoral). Recuperada de: http://roderic.uv.es/bitstream/handle/10550/50157/TESIS%20NADIA%20ALONSO.pdf?sequence=1

_(2016): Nuevas formas de consumo televisivo en un nuevo escenario mediático, en Francés, M. y Orozco, G. (Coords.) *Nuevos modelos mediáticos. Diversidad, usuarios y ventanas,* pp. 277-291, Madrid, Síntesis.

_(2014): Cambios en el consumo televisivo en tiempos de crisis, en Francés, M., Gavaldà, J., Llorca, G. y Peris, A. (Coords.), *La televisión de la crisis ante el abismo digital*, pp. 347-365, Gedisa, Barcelona.

Baudrillard, Jean (1978): *Cultura y Simulacro*, Kairós: Barcelona.

Barlovento Comunicación (2005-2016): «Análisis televisivo». Madrid. Recuperados de: http://www.barloventocomunicacion.es/publicaciones.html

Bustamante, Enrique (2013): *Historia de la radio y la televisión en España. Una asignatura pendiente de la democracia*, Gedisa, Barcelona.

Costa, Carmen (2010): «Coaching-shows: Análisis de un nuevo género televisivo» en *Área abierta*, nº 27. Madrid, Servicio de Publicaciones de la Universidad Complutense, pp. 1-15.

Díaz Nosty, Bernardo (2006): Repensar la comunicación, la huella es el mensaje, en Díaz Nosty, B. y Fernández Beaumont, J. (Dir.) *Tendencias 06, Medios de comunicación: el año de la televisión,* pp. 15-43, Telefónica, Madrid.

Eco, Umberto (1985): *La estrategia de la ilusión*, Lumen, Barcelona.

Francés, Miquel (2014): La producción audiovisual española ante las incertidumbres del modelo mediático, en Francés, M., Gavaldá, J., Llorca, G. y Peris, A. (Coords.) *La televisión de la crisis ante el abismo digital,* pp. 121-161. Gedisa, Barcelona.

_(2011): «Producción y multidifusión de contenidos audiovisuales», en Francés, M. (Coord.), *Contenidos y formatos de calidad en la nueva televisión*, pp. 187-224, Instituto RTVE, Madrid.

Gavaldà, Josep (2011): Contenidos de cantidad, en Francés, M. (Coord.), *Contenidos y formatos de calidad en la nueva televisión*, pp. 71-101, Instituto RTVE, Madrid.

García-Santamaría, José Vicente (2013): «Televisión y concentración en España: el duopolio de Mediaset y Atresmedia», en *Palabra Clave*, nº16. Colombia, Universidad de La Sabana, pp. 366-397.

García-Santamaría, J.V. y Fernández- Beaumont, J. (2011): Los grupos de comunicación y la televisión en España: la continuidad del oligopolio mutante, en Casero, A. y Marzal, J. (Eds.), *Periodismo en televisión. Nuevos horizontes, nuevas tendencias*, pp. 156-169, Comunicación Social: Zamora/ Sevilla.

González Requena, Jesús (1989): *El espectáculo informativo. O la amenaza de lo real,* Akal, Madrid.

_(1992): *El discurso televisivo: espectáculo de la posmodernidad*, Cátedra, Madrid.

González Requena, J. y Martín Arias, L. (1994): «El texto televisivo», en *Signos. Teoría y práctica de la Educación*, nº 12, pp. 4-13.

GECA (1993-2015). «Anuarios e informes de la televisión». Gabinete de Estudios de la Comunicación Audiovisual. Madrid. Recuperados de: /http://www.geca.es

INE, Encuesta de Población Activa 2005-2016. Recuperada de: http://www.ine.es

Infoadex, (2005-2016). «La inversión publicitaria en España». Recuperado de: http://www.infoadex.es

Lafrance, Jean Paul (1999): La televisión del siglo XXI: ¡será o no será!, en Bustamante, E. y Álvarez Monzoncillo, J.M. (Eds.) *Presente y futuro de la televisión digital,* pp. 283-297, Edipo, Madrid.

Llorca, Germán (2015): Contenidos para la convergencia mediática, en Francés, M., Llorca, G. y Peris, A. (Coords.) *La televisión conectada en el entorno transmedia*, pp. 95-113, Ediciones Universidad de Navarra.

López Villanueva, Juan Antonio (2011): La reconfiguración de la cadena de valor, en Álvarez Monzoncillo, J.M. (Coord.) *La televisión etiquetada: nuevas audiencias, nuevos negocios*, pp. 9-32, Ariel, Barcelona.

Marzal, J. y Casero, A. (2009): «Las políticas de la comunicación ante la implantación de la TDT en España. Balance crítico y retos pendientes» en *Sphera Pública: revista de Ciencias Sociales y de la Comunicación*, nº 9. Murcia, Publicaciones de la Universidad de Murcia, pp. 95-113.

_(2008): «La investigación sobre televisión local en España: nuevas agendas ante el reto de la digitalización» en *Zer: revista de estudios de Comunicación=Komunikazio ikasketen aldizkaria*, nº 25, País Vasco, Publicaciones de la Facultad de Ciencias Sociales y de la Comunicación de la Universidad del País Vasco, pp. 83-106.

Majó, Joan (2012): Evolución de las tecnologías de la comunicación, en De Moragas, M. (Ed.), La comunicación: De los orígenes a Internet, pp. 65-91, Gedisa, Barcelona.

Prado, Emili (2002): «Televisión en la era digital: homogeneización versus diversidad», en Telos, nº 51. Madrid, Fundación Telefónica, pp. 45-49.

Vaca, Ricardo (2015): «Televisión, pantallas y convergencia digital. El consumo, clave de bóveda de la industria audiovisual», Lección magistral en la Facultad de Humanidades y Ciencias de la Comunicación, Universidad CEU San Pablo.

Vaca, Ricardo (2015): Hacia un nuevo consumo audiovisual: TV e Internet, en Francés, M., Llorca, G. y Peris, A. (Coords.), *La televisión conectada en el entorno transmedia*, pp.145-167, Pamplona, EUNSA.

_(2010): *El perfil de la audiencia de Cuatro y La Sexta: 2005-2008,* Fundación Ex Libris: Madrid.

_(1997): *Quién manda en el mando. Comportamiento de los espectadores ante la televisión*, Visor, Madrid.

Web del Ministerio de Energía, Turismo y Agenda digital. Informes sobre Televisión Digital: Recuperados de: http://www.televisiondigital.gob.es/TDT/Paginas/canales-tdt.aspx