Impact of the Covid-19 pandemic on media consumption in Spain

Impacto de la pandemia de Covid-19 en el consumo de medios en España

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ABSTRACT
Introduction: This study aims to explore the impact of the Covid-19 pandemic on media habits and consumption in Spain, one of the most severely affected countries. **Methodology:** A representative online survey of the Spanish population (N = 1,500 participants) was conducted from March 13 to 30, 2020, coinciding with the first weeks of home confinement. The sample was studied according to two variables, gender (Women N = 750; Men N = 750) and age (18-39 years individuals, N = 720; over 40 years individuals N = 780) to detect the most relevant specificities of each group. The sampling error is ± 4.38% at a 95% confidence. **Results:** Results highlight that television is the most used media when it comes to finding out about the virus, before digital media. It should be noted that infoshow-type television programs manage to accumulate more audience than the traditional news programs. The least used media to get information about the evolution of the Covid-19 are the Internet, social networks, radio, information by relatives or acquaintances, and traditional print press. Although radio consumption seems not to be significant to stay informed, this medium is the most credible, in addition to television. Finally, the consumption of over-the-top (OTT) platforms has grown considerably during this period. **Discussion:** Television recovers the audience of the youngest targets that it seemed to have lost in in favor of digital media. **Conclusions:** An increasingly complex and competitive media landscape is consolidating.

KEYWORDS: audiences; media consumption; habits; crisis situations; health crises; Coronavirus; Covid-19; confinement.

RESUMEN
Introducción: Este estudio tiene como objetivo explorar el impacto de la pandemia de Covid-19 en los hábitos y el consumo de medios en España, uno de los países más gravemente afectados. **Metodología:** Se realizó una encuesta en línea representativa de la población española (N= 1,500 participantes) del 13 al 30 de marzo del 2020, coincidiendo con las primeras semanas de confinamiento en el hogar. La muestra se estudió según dos variables, género (mujeres N= 750; hombres N= 750) y edad (18-39 años N = 720 y más de 40 años N = 780) para detectar las especificidades más relevantes de cada colectivo. El error muestral es del ±4,38% al 95% de confianza. **Resultados:** La televisión destaca como el medio más utilizado a la hora de informarse sobre el virus, por delante de los medios digitales. Cabe destacar también que programas televisivos tipo "*infoshows*" consiguen acumular más audiencia que los informativos tradicionales. Los medios menos utilizados para informarse sobre la evolución del Covid-19 serían internet, redes sociales, radio, información proporcionada por familiares o conocidos y prensa en papel. Aunque no destaca el consumo de la radio para mantenerse informado, este medio es considerado como el más creíble, conjuntamente con la televisión. Por último, el consumo de las plataformas "*over-the-top"* (OTT) ha crecido de forma considerable durante este periodo. **Discusión y conclusiones:** La televisión recupera así la audiencia de los más jóvenes que parecía haber perdido a favor de los medios digitales, consolidando un panorama mediático cada vez más complejo y competitivo.

PALABRAS CLAVE: audiencias; consumo de medios; hábitos; crisis sanitarias; coronavirus; covid-19; confinamiento.

CONTENT

Translation by **Carlos Javier Rivas Quintero** (University of the Andes; Mérida, Venezuela)

1. Introducción

The emergence of COVID-19 in China in December 2019 became a global health crisis, currently affecting more than 185 countries across all five continents, and which has caused, so far, more than 27,000 deaths and more than 140,000 recovered patients in Spain.

The state of alarm decreed by the Spanish government initiated on March 14 (Royal Decree Law-463/2020) and until May 11 the confinement de-escalation, phase 1, has not started in some Health Regions. Almost two months during which 47 million citizens have been forced to stay in their homes as long as possible.

This lockdown is an exceptional situation that has caused new life models, new consumption habits, and particularly, new forms of media, entertainment, leisure, and culture consumption.

The confined citizenry had plenty of time to get informed and entertain themselves, so inquiring about the changes produced by the pandemic and the habits acquired during the weeks of state of alarm are of interest to detect trends, new interests, and viewing or listening time distributions, whilst conducting a comparison between "targets".

This research aims to analyze the impact of the Coronavirus pandemic on media habits and consumption in Spain, based on a survey administered to the population. To carry it out, this article is divided into 4 sections, in addition to the introduction and bibliographical references; the first one presents the state of the art, addresses the current context of the network society and collects investigations of media habits and consumption. The second part details the methodology used, followed by the presentation and analysis of the survey results, and finishes with the discussion and main contributions.

1.1. State of the art

We live immersed in a competitive media landscape, saturated with content -there is hybridization of traditional and digital media that produces complementarity between them in the information gathering process- and where it is difficult to decide on which information to settle. In addition to the growing disinformation and increase in fake news, there is lack of trust in traditional media. Currently, citizens approach the media rather than the content, and in this information supply (quantity and quality) and demand (consumption habits, information practices), we see how their opinions, and their civic and electoral behavior is conditioned (Casero-Ripollés, 2020).

Citizen participation is increasing in today's society, as Livingstone (2013) states; "today's media environment is reshaping the opportunity structures by which people (as audiences and as mediated publics) can participate in an increasingly mediatized society". On another note, the power and high presence of opinion leaders also determines the media diet: "There is a widespread presence of opinion leaders in the respondents' social media feeds, bringing attention to news they otherwise would have missed, and just as important, delivering interpretation and context" (Bergström & Belfrage, 2018:1).

To the aforementioned panorama, we have to add a global crisis, which started as a health crisis with the COVID-19 pandemic that arrived in Spain by mid-March. According to the World Health Organization, in the health field, the concepts "crisis" and "communication" are closely related, making communication an important ally for political, social, institutional, and health management.

1.2. Information consumption habits

Being aware of the communicative society model in which we are, helps us have deeper and better understanding of media consumption. Spanish consumers are choosing the Internet more over television; mobile devices and social networks' popularity is promoting a more fragmented and multi-display media consumption; while visual and user-generated content is being imposed, which is even incorporated in the most traditional media (AIMC, 2020).

New trends and consumption patterns are marked by a wide-ranging variety of factors that generate new lifestyles. These include higher educational background and higher purchasing power, changes in households composition (to become parents at a later age, the incorporation of women into the labor market, to possess digital devices, higher digital literacy); consumption habits (the time spent on leisure and work is increasingly diffuse); and expenditure on homes' equipment has increased. Socio-demographic changes; over the past recent years, households composition has changed, there are more and more homes, but fewer members per home, and family types have also changed, with more single-parent families. Women's inclusion into the labor market is also a trend founded in our time, and this has an impact on the consumption patterns of the family unit. The places of purchase; although the largest volume of purchases are still made offline today, many are the Internet users who seek pre-purchase information on the Internet.

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The new consumer has new behavior forms associated with a more informed user profile, with higher educational background, more reflective, who seeks to minimize risks, and wants security and simplicity in the purchase process. With ICTs, consumers have a vast amount of inputs at their disposal to compare the same product and learn about it through social networks and interaction with other people. New prosumers base their purchase decision process on the information collected from social networks. New forms of consumption: collaborative consumption, sustainable consumption, ethical consumption, and fair trade are examples of the boom in the new forms of a more responsible, cooperative and beneficial for everyone ways of consumption; and digital platforms promote this type of consumption. Globalization, we are projecting towards a global consumer mainly due to the multicultural makeup of the population and access to the Web.

Data from the National Observatory of Telecommunications and the Information Society (2019), pertaining to 2018, indicate that 18.1 million homes (98.0%) have mobile telephony and 15.9 million (86.0%) landline telephone services. 15.2 million homes have Internet access (82.2%) and there are 7.5 million homes subscribed to pay TV (40.5%), with optical fiber being the predominant technology. Internet usage frequency is quite intensive, since 83.3% of websurfers claim to access the Internet daily or almost daily and 72.7% the day before. 34.2 million people use the Internet, that is, 87% of the population, and 83.7% use it to search for information. These connections are still being made from the same places; their own home (93.5%), friends or relatives' home (39.9%), and from work (40.1%). The preference for mobile phones as the device to access the Web has further accentuated. Subscription to streaming video content is found in 10.9% of Spanish homes, increasing its coexistence with pay television services; 8.6% claim to have subscribed to both services.

Some of the viewing habits, together with the nature of television content and multi-display consumption, constitute some of the most important changes. 60% of viewers who watch television do it while using a social network. Of this group, 40% discuss what they are watching on television via social networks. More than half of 16- to 24-year-olds regularly use complementary devices to communicate with others via messaging, e-mail, Facebook, or Twitter about programs being watched on television (Hirshberg, 2004). The average daily media consumption time in Spain is led by 212.9 minutes spent on television, and, in the second position, 161.2 minutes on the Internet (Statista, 2020).

Most traditional media are gradually losing relevance in favor, essentially, of Internet usage, which consolidated as the most valued medium by consumers. One of the consequences of this change in trend, which is already a fact, is the smartphone positioning as the best-assessed device, over television. Projections for 2020 before the pandemic started predicted the growth of the Internet and online shopping: the unstoppable upward trend in smartphones, online subscriptions and services, and online collaborative platforms (Epdata, 2020).

1.3. Media consumption in times of crisis

Society's media dependency level is determined mainly by today's fast-changing situation, the presence of conflicts or instability, and the importance of the media as the main source of information (Ball-Rokeach & DeFleur, 1979; McQuail & Windahl, 1993). The socio-structural environment is a determining factor that needs to be taken into account. A country like China, during the 2003 public health crisis, without free flow of information, promoted citizens to engage in information seeking from alternative resources such as short message services (SMS) and the Internet, and even to create alternative information channels, being information producers and disseminators. The Internet was a particularly powerful tool that allowed these citizens to bypass official control and to challenge official statements during the crisis (Tai & Sun, 2007).

In Western society, the media have the necessity of explaining what is happening to citizens. The exceptional nature of a moment enhances the journalistic information that, together with official announcements and other live broadcasts, interrupt the regularity of the programming. Rarity increases the value of what is scarce. These broadcasts are presented as unusual but highly interesting audiovisual products (Dayan & Katz, 1995; Blanco, 1999).

During this epidemic, overproduction of academic papers has positioned scientists as opinion leaders (Costa-Sánchez, 2020). As Cowper (2020:1) states: "Scientists, technocrats, and other experts could become the stars of 2020. The public's reaction to the communications efforts so far will be crucial to deciding how events proceed in the 'contain' stage of the national strategy, which is to be followed by 'delay spread,' and then 'do the science and research' and 'mitigate impact on the NHS'". Additionally, media coverage is considered an effective way to curb the spreading of the disease during its early outbreak stage (Zhou, 2020). "The overwhelming amount of information and the overuse of mass media in communicating the Covid-19 virus might contribute to overreaction, unwarranted public fear, and an overly pessimistic feeling in perceiving the current risk" (Huynh, 2020:5).

In this context, consumption habits and trends have been drastically modified due to the pandemic and the confinement measures decreed by the government; hence, television and digital media consumption have soared during confinement. Digital newspapers receive 45% more pageviews and their traffic increased by 100%; online radio digital audience grew by 112% (and it stands as one of the most credible media to the audience. [Rodero, 2020]), and live streaming television accumulated 93% of unique users. For its part, television has also become the main source of entertainment and information (*Crónica Digital*, 2020).

The most relevant increases were registered among 13- to 24-year-olds, and by time slots. Mornings, after-lunch and afternoons are the slots that increased the most, around 25% of the total population. On another note, news programs are also experiencing significant growth, with 65% increase in their daily consumption. Moreover, religious programs consumption has strikingly increased, growing by 80%. Other recovered habits are the creation of digital communities, the increase in "*e-games*" audiences, the rise of the "Do it yourself" trend, "balconing" as a new way of socializing, and humor as an escape route. Regarding global economic consequences, the world GDP growth rate is expected to be the lowest in 30 years, around 2%; and it should be noted that in Spain the IBEX has dropped by 9.1% in four sessions and, in the last six days, the decrease was 11.15%, its greatest decline since 2011.

Within the media consumption "new normality", audience ratings are still higher than during pre-isolation, although with the lockdown easing stages and work reopening to more sectors, a slight decrease is already being observed. Television drops below 9 million daily average viewers and 300 minutes of consumption. Other uses of television, such as gaming and payment platforms, remain high. Internet daily connection time is still high, although the number of pageviews has slightly reduced, especially on weekends.

All studies coincide there will be a before and after in consumers' mental attitude, either caused by reflection during this long lockdown (which leads to reconsidering consumption behaviors and lifestyle, making evident how dispensable some of them are) or by the economic context itself, which concerns many, making them rethink their expenses. Habits in the home and during the lockdown easing stages will exhibit changes and consumption trends once again.

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2. Methodology

A sequential self-administered online survey, representative of the Spanish population (N = 1,500 participants), was conducted during the first days of quarantine (from March 13 to 30, 2020). The sample was subdivided according to two variables: ages, 18- to 39-year-olds (N = 720) and over 40 years of age (N = 780), and gender, women (N = 750) and men (N = 750), to detect the most relevant specificities of each group. The sampling error is ± 4.38% at a 95% confidence.

We consulted the *Kantar Media* database to obtain the television audience data of the same period under analysis.

3. Results

All the publics under analysis learned of the existence of the coronavirus mainly via television (Table 1). In the case of 18- to 70-year-old men, online press (47.8%), the Internet (44.7%) and announcements from official sources (42.1%) also stand out. Women between ages 18 and 70 learned of the presence of the novel virus via TV (87.2%), announcements from official sources (40.6%) and social networks (37.3%). According to age, the youngest ones, 18- to 39-year-old individuals, learned of it via TV (84.4%), social networks (40.0%), online press (37.9%) and official announcements (36.8%). Older individuals between ages 40 and 70 got first informed of the virus via television (88.2%), official announcements (45.6%), online press (43.6%) and radio (39.5%).

Table 1. *Media usage percentages comparison segmented by publics studied*

	Total Ind. *N=1.500*	**18- to 70-year-old men** *N=750*	**18- to 70-year-old women** *N=750*	**18- to 39-year-olds** *N=720*	**40- to 70-year-olds** *N=780*
How did you learn of the Coronavirus? Via…					
Television	86,4	85,6	**87,2**	84,4	**88,2**
Online press	40,9	**47,8**	33,9	37,9	**43,6**
Radio	31,2	**38,1**	24,2	23,2	**38,5**
The Internet (search engines, webs, blogs, forums…)	38,8	**44,7**	33,0	**39,8**	38,0
Announcements from official sources (Ministry of Health, WHO…	41,4	**42,1**	40,6	36,8	**45,6**
Social networks (Twitter, Facebook, Instagram…)	37,0	36,6	**37,3**	**40,0**	34,3
Relatives/Friends/Acquaintances	31,7	**33,2**	30,1	**32,7**	30,7
Print press	20,7	**25,6**	15,7	16,4	**24,6**
Other mediums	1,3	1,0	**1,5**	0,7	**1,8**
What media do you use to stay informed about the virus?					
Television	83,2	82,6	**83,8**	78,6	**87,5**
Online press	49,8	**55,7**	44,0	**50,0**	49,6
Announcements from official sources (Ministry of Health, WHO…	50,3	47,4	**53,3**	46,9	**53,5**
The Internet (search engines, webs, blogs, forums…)	41,8	**43,8**	39,8	**43,1**	40,6
Social networks (Twitter, Facebook, Instagram…)	35,5	33,0	**37,9**	**40,5**	30,8
Radio	29,0	**35,5**	22,4	18,2	**38,9**
Relatives/Friends/Acquaintances	22,0	21,6	**22,3**	**22,2**	21,7
Print press	9,5	**12,2**	6,8	8,1	**10,8**
Other	1,1	0,3	**1,9**	0,9	**1,3**
I do not get informed	0,7	**0,9**	0,5	**0,8**	0,7

Source: Data provided by Havas Media; Authors' own creation.

As the pandemic spread aggravated, media consumption to stay informed has consolidated three sources: television, official announcements, and online press (Table 1). These coincide as the most used sources by the groups studied, although their consumption varies slightly between one another. By gender, we see that 18- to 70-year-old men got informed mainly via television (82.6%), online press (55.7%) and official announcements (47.4%). Women between ages 18 and 70 used television (83.8%), announcements from official sources (53.3%) and online press (44.0%) the most. By ages, television (78.6%), online press (50.0%) and announcements from official sources (46.9%) stand out

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among the youngest, and TV (87.5%), announcements from official sources (53.5%) and online press (49.6%) among the older groups.

The least used media to get informed about the evolution of the Coronavirus, in all the groups studied, were the Internet, social networks, radio, relatives/acquaintances and printed press.

Although radio consumption to keep informed about the evolution of the virus did not stand out, this medium was prominently regarded, together with television, as the most credible source by the entire population (Table 2). These two media were the ones that inspire the most confidence among the groups studied, followed closely by the press, both in its digital and printed format.

Table 2. *Comparison of confidence levels in the media according to the publics studied*

	Total Ind. *N=500*	**18- to 70-year-old men** *N=250*	**18- to 70-year-old women** *N=250*	**18- to 39-year-olds** *N=240*	**40- to 70-year-olds** *N=260*
To you, what mediums are more credible to get informed about the coronavirus? Rate form 1 to 7 (1=minimum, 7= maximum)					
Radio	5,3	5,4	5,2	5,0	**5,5**
Television	5,3	5,1	**5,4**	5,1	**5,4**
Print press	5,1	5,0	**5,2**	5,0	**5,2**
Online press	5,1	5,0	**5,2**	5,1	5,1
The Internet	4,2	4,0	**4,4**	**4,5**	3,9
Relatives/Friends/Acquaintances	4,0	3,9	**4,1**	**4,1**	4,0
Social networks	3,5	3,1	**3,8**	**3,8**	3,2

Source: Data provided by Havas Media; Authors' own creation.

Emphasis has been laid on the study of television consumption during this period since it is the most widely used medium. Kantar Media data confirmed that television consumption has increased considerably in all target audiences, a logical and reasonable result due to the confinement, but we want to highlight the increases by 147% in the18- to 39-year-olds group, and by 82% in 18- to 70-year-old men group (Table 3). Therefore, the people who were getting informed now do it more frequently, maybe because they have more free time and to have a better understanding of the pandemic evolution, and to be able to act upon the utmost knowledge at their disposal.

Table 3. *Average television audience (in thousands) for each of the publics studied*

	Total Ind.	**Adult men**	**Adult women**	**18- to 39-year-olds**	**40 or older ind.**
13/03/2020 to 19/04/2020 period	8.613	3.969	4.644	1.611	7.002
Growth compared to previous period (21/02/2020-12/03/2020)	**63%**	**82%**	**50%**	**147%**	**53%**

Source: Kantar Media

Audience per television network varies according to gender, being *Antena 3* the most-watched among adult men (Table 4), followed by *La 1* and the regional ones. As for women, *Telecinco* leads the audience, followed by *Antena 3* and *La 1*. There were no significant differences by ages.

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Table 4. *Average television audience (in thousands) per network according to the different publics studied*

Television networks	Total Ind.	Adult men	Adult women	18- to 39-year-olds	40 or older ind.
Total TV	8.729	3.999	4.730	1.649	7.079
T5	1.220	397	823	213	1.007
A3	1.028	443	585	178	850
La1	925	410	515	137	787
Regional	810	380	430	132	679
La Sexta	795	406	389	158	637
Thematic pay TV	732	385	347	165	566
Cuatro	461	220	241	93	368
La2	248	131	117	27	221

Source: Kantar Media

The type of television programs with the highest audience ratings during confinement were infoshows, followed by news programs for all the groups studied (Table 5).

Table 5. *Average television audience (in thousands) per type of program according to the different publics studied*

Type of program	Total Ind.	Adult men	Adult women	18- to 39-year-olds	40 or older ind.
Infoshow	350	120	230	63	287
Information	222	104	117	39	182
Contests	170	73	98	26	144
Religious	155	58	97	10	145
Miscellaneous	88	40	48	16	72
Fiction	60	28	32	12	49
Cultural	37	20	17	5	32
Bullfighting	15	9	6	1	14
Sports	10	7	3	2	9
Musicals	5	3	3	1	4

Source: Kantar Media

Regarding news programs, those that achieved the highest audience ratings were the ones of *Telecinco* for all the groups studied, except for adult men, who opted for *Antena 3* (Table 6). The news programs of *La 1* of *Televisión Española* [EN: Spanish Television] were in the fourth position, way below in ratings compared to the leading private broadcasters.

Table 6. *News programs average audience (in thousands) per television network according to the different publics studied*

Television network	Total Ind.	Adult men	Adult women	18- to 39-year-olds	40 or older ind.
T5	1.401	500	901	265	1.136
La Sexta	1.274	652	622	252	1.023
A3	1.098	502	597	208	890
La1	696	320	376	105	592
Cuatro	351	173	177	83	268
La2	141	79	62	17	124
Regional	62	29	33	11	51
Thematic pay TV	4	2	2	1	3

Source: Kantar Media

The consumption of over-the-top (OTT) platforms was also analyzed, in this case Netflix, Movistar, Vodafone, HBO and Amazon. Over-the-top platforms and applications, or just OTT platforms, are applications that offer video content via the Internet, bypassing cable or satellite television (the traditional way). They allow users to instantly stream videos on mobile devices (Smartphones and tablets), web and televisions using devices such as Chromecast, AppleTV and Amazon Fire TV, as well as SmartTVs. The data show a high increase in all the groups studied, especially among 18- to 39-year-old individuals (+53%) (Table 7).

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Table 7: *Average television audience (in thousands) of OTT platforms according to the different publics studied*

	Total Ind.	Adult men	Adult women	18- to 39-year-olds	40 or older ind.
Total TV	8.613	3.969	4.512	1.611	7.002
OTT consumption	3.213	1.498	1.769	859	2.354
OTT total %	37%	38%	39%	53%	34%

Source: Kantar Media

4. Discussion and conclusions

This research highlights the importance of television over other type of media. This datum seems to contradict previous studies claiming that television had lost its young audience in favor of digital media (Mumtaz; Karamat; Iqbal, 2019; Sedláček, 2016). This work points out that during critical moments, citizens, of all ages, prefer obtaining information via the traditionally known number one medium, and especially excluding the Internet, social networks and information received from acquaintances. Radio, as stated by Rodero (2020), and television are regarded by the population as the most credible mediums, and social networks as the least credible, despite the increasing and continuous use in recent years (AIMC, 2020).

The rise of fake news and hoaxes on the Internet could be one of the main reasons for distrust. Previous studies have shown that exposure to fake news leads to lower levels of trust in the media and less accurate identification of real news (Van Duyn & Collier, 2019). A correlation between social networks and dissemination of fake news was also observed (Nielsen & Graves, 2017; Rodríguez-Fernández, 2019). As the very UNESCO (2020) recognized, fake news has spread faster and more dangerously than the virus itself during this period, and has undermined the information promoted by health services regarding the evidence-based precaution measures (O'Connor, & Murphy, 2020).

In this regard, it is important to highlight the role of live official announcements, as an unusual but of great interest television piece (Dayan & Katz, 1995; Blanco, 1999). Online press and radio have also consolidated as prominent news media, although there are slight differences in the audience of the targets analyzed. Similarly as Masip et al., (2020) conclude, we detect the "trend for taking shelter in recognized media, mainly news programs on public television networks and the digital version of traditional newspapers".

Lázaro-Rodríguez (2020) already points out the essential role of digital media, which are the most used to post information about the COVID-19, when it comes to fulfilling the information needs of the population. These media, being the ones exhibiting the highest amount of content about the virus, have not managed to take the lead when building trust and credibility. One of the reasons could be that the public feels overwhelmed by the amount of information related to this novel virus (Tanne et. al., 2020). The survey data were not aimed at analyzing the contents in television networks' programming. It would be of interest, in a later study, to have a broader view to explain gender-based behaviors, as well as the audience's assessment made on the news coverage carried out, that is, whether they fulfill their function as an information service or contribute to increasing social unrest.

Within television's leadership, it is important to note that infoshow-type programs are the ones getting the highest audience ratings, above traditional news programs. In this sense, just as has happened in other moments of catastrophe or crisis, information is relevant and a priority, but people need to combine it with humor and entertainment to cope with the severity of COVID-19 related

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news. Although it is not this study's focus, the necessity of receiving information constantly has caused information overload, together with false content that is disseminated on social networks and other platforms, which have also played a relevant role during lockdown. These data could reveal a new trend in news programs that allows recovering the youngest target audiences they had lost in previous years. Children and teens in schools have found an educational space on television with the programs incorporated in television's dayparting. Recovering the youngest targets, together with the rise of OTT platforms, show how the post-COVID-19 era consolidates an even more competitive and content-saturated media landscape. The increase in OTT platforms' subscribers achieved during quarantine raises the question about their permanence once they return to the so-called "new reality".

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