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Television consumption trends among the ‘digital generation’ in Spain

ABSTRACT

The development of new technologies is changing the habits of television consumption among young people. The multiplication of channels has intensified the fragmentation of the market and its audiences and the individualist atomization in the media preferences and consumption. This article is part of a research project aiming to establish television consumption preferences, opinions and habits of Spanish young people, aged between 14 and 25 years, and the differences between the two groups into which the respondents were divided (14–17 and 18–25). The article shows the extent to which Spanish youngsters have turned to new media as a source of entertainment. Indeed, one of the most groundbreaking results that should be highlighted is the difference between the two groups in their approach to the Internet as a source of entertainment.

The article shows how the digital generation demands the adaptation of television content to the new platforms – such as the Internet or mobile phone – and the renewal of television formats. The findings of this study also point to trend indicators and guidelines that advertisers and media companies might be interested in when designing new creative and innovative television content.

KEYWORDS

television
media
consumption
trends
digital generation
Spain

INTRODUCTION: FROM THE ANALOGUE SWITCH-OFF TO DIGITAL TELEVISION

The analogue switch-off in Spain in April 2010 was a natural step in the evolution of the Information Society, and society in general, following the path established by new technologies in recent years. The 1980s witnessed some very significant changes that were linked to new developments in Spanish television: an increase in the number of broadcast hours, the emergence of regional channels and the establishment of first private networks in 1990 (Antena 3 and Tele 5). These changes were followed by the emergence of pay TV channels, more private channels and, at the end of the 1990s, the emergence of Digital Terrestrial Television (henceforth, DTT). Indeed, DTT was born in 1999 and by 2005 the Spanish government had approved the new National Technical Plan for DTT (PTNTDT in the Spanish acronym), which brought forward the date of the analogue switch-off (scheduled for 2012) to April 2010. This marked the final transformation of 'neo-television' into so-called 'hyper-television', an evolution that Gordillo (2009b: 13) and Scolari (2008: 2–5) divide into three phases:

1. Paleo-television is a structured and hierarchical television model, with a clear separation of genders, ages and audiences, in which viewers had no way to participate. That was the case for Spanish national public television (TVE) until 1990.
2. Neo-television runs parallel to the development of private television, the content of which is focused on entertainment. This phase is characterized by the show, and it involves both public and private television. Reality TV, a precursor to hyper-television, resulted from this television model.
3. Hyper-television refers to the digital television phase (cable, satellite and terrestrial). In theory, this is the phase of proximity and interactivity, although it has been argued that, instead, what is promoted is a 'superficial and asocial model, where everything happens at a rapid pace' (Casetti and Odin 1990: 19–20). The era of 'hyper-television', according to Lipovetsky (2003: 26–55), implies a process of innovation in which 'in order to survive, the old media must adapt and imitate new media' (Scolari 2008: 7). Hyper-television, also called 'enhanced TV', is a higher stage of interactive television (iTV), with a broad and extensive technological horizon going beyond the one-way television model. It has been argued that hyper-television is very attractive to young people and that it is taking the medium to a stage at which 'the viewer will be able to participate actively on programme content. [It is] a television [...] in which the audience will be able to build their own experience' (Pérez de Silva 2000: 164).

For González, Rodríguez et al. (2010), hyper-television is a higher, enriched stage of interactive television, which in addition to programming offers a bonus pack of activities, including the possibility of chatting with other viewers in real time; playing and participating instantly in games and contests; and consulting biographies, statistical tables or any other supplementary material.

According to Chorianopoulos (2007: 23), besides the delivery of high-quality picture and sound, interactive television 'promises to change the role of passive viewers by turning them into active participants of television viewing experience, e.g. enhanced content navigation, user-generated content, interpersonal communication'. Chorianopoulos further defines iTV as 'a user experience that

involves at least one user and one, or more, audiovisual and networked devices' (2007: 23). Apart from the concept of 'usability' (2007: 23), Choriantopoulos pays particular attention to the notion of sociability, stating that

content-enriched communication refers to two types of sociability: synchronous, when viewers get together and watch the same show at the same time; and asynchronous, when viewers interact after the show has already been seen by each one, independently and at different times.

(2007: 26)

As noted above, 2010 was not only the year of the digital switchover in Spain, but also the year in which a new record in television consumption was set (234 minutes per person per day), the year in which public television (TVE 1) became the leader in its first year without advertising and the year of the proliferation of channels with the arrival of DTT. The analogue switch-off process ended on 3 April 2010, and this change set in motion a new audio-visual era that was completed with the passing of the General Law of Audiovisual Communication (*Ley General de Comunicación Audiovisual*) on 1 May 2010. This law established the regulatory framework for the audio-visual sector and, among other things, specified the conditions for mergers between operators, the development of pay DTT and the regulation of advertising on television. It allowed operators to launch pay channels, limiting to 50% the non-free channels allocated to each licence. It also established that advertising should be reduced to a maximum of twenty minutes per hour (instead of the 29 initially planned by the government), including conventional advertisements (twelve minutes), self-promotion (five minutes devoted to advertising the channel's own programmes) and tele-promotion (three minutes during which, for instance, the host of a show advertises a commercial product at some point during the programme he or she is presenting).

At the end of 2010, Spain witnessed the first merger between Telecinco (operated by Gestevisión) and Cuatro and Digital + (operated by Sogecable). The new regulatory framework and the subsequent mergers have affected television consumption. According to Barlovento Comunicación's analysis of Kantar Media's audience data, in 2010, there was:

A historical proliferation of networks born under the protection of DTT (the so-called 'thematic DTT concessions') with 18.5% of audience share (8.3 points more than the previous year) [...]. The analogue switch-off in April determined the current distribution of television consumption [...] and from that moment on, almost 80% of television viewing has been taking place via DTT, 15% via cable, and 5% via satellite.

(Barlovento Comunicación 2011)

In other words, the multiplication of channels has intensified the fragmentation of the market and its audiences, and also a progressive loss of audience share across the major networks. Among those aged between 14 and 25 in particular, another immediate consequence of the new broadcasting arrangements has been a gradual decrease in those who consume television in a context that could be regarded as 'traditional': that is, at home and with the rest of the family – 6% according to the May 2009 *Estudio General de Medios*

1. The Observatory of Digital Leisure and Entertainment (OCENDI) was created with the aim of contributing to the understanding of cultural and social behavioural changes among young people, brought about by the use of new information and communication technologies as a means and source of entertainment. For further details, go to www.ocendi.com.

report (see AIMC 2011). The general trend also points to an individualistic atomization in media preferences.

At the same time, the Internet is emerging as a popular platform for the consumption of audio-visual products. As a consequence, from the point of view of production, the introduction of DTT in European households has forced media companies to review ideas about traditional television programming and adapt them not just to the new digital media, but also to new consumers' content preferences.

Indeed, there has been a 'need for the continuous adaptation of the new audio-visual market which was materialised in the *transmedia design* of the products and services to be distributed across all available platforms and media' (Arnanz and García 2010: 13). This means that audio-visual content is distributed through different channels, each of which is forced to provide differentiated content, in a process that is arguably complementing and enriching the experience of viewers and users.

OBJECTIVES AND METHODOLOGY OF THE STUDY

This article is part of a research project entitled 'Young people's preferences in relation to new television formats: Consumption trends among young people aged fourteen to twenty-five years', funded by the Observatory of Digital Leisure and Entertainment (henceforth OCENDI).¹ This group of young people includes both teenagers – which according to the World Health Organization are those aged between 10 and 19 years – and those aged between 19 and 25. Some studies refer to the latter group as Generation Y (those born between 1982 and 1992), and to the younger group as Generation Z (those born between 1994 and 1997). The term 'digital natives' (Prensky 2001b: 1) or those for whom the Internet has existed as long as they can remember, the Net Generation (Tapscott 1998: 10–15), or what the American sociologists Howe and Strauss (2000: 3–6) call the 'Millennials', all refer to people born between 1985 and 2000 for whom technology has been and is part of their everyday life. This digital generation has grown up surrounded by television screens, video games, computers and mobile phones, thus becoming what Ignasi de Bofarull calls 'screenagers' – children or adolescents who spend many hours hooked on ICTs (Bofarull 2005: 120).

The objective of this article is twofold: on the one hand, to present the preferences, opinions and attitudes of this group of youngsters towards hyper-television; and, on the other, to assess the impact that this new type of television and other new technologies has had on television consumption among the so-called digital generation in Spain. The investigation follows on from and assesses the validity of earlier studies, which show that television consumption habits among young people in Spain are gradually changing as a result of the development of new technologies. This was one of the main conclusions of the first conference on online television (October 2009), organized by Televeo (the Spanish platform for high-quality legal audio-visual content, created in 2007). According to data provided at this conference, 70% of young Spaniards had occasionally downloaded audio-visual content, while 40% had watched streamed television or videos (Panoramaaudiovisual 2009).

In 2007, the European Interactive Advertising Association (EIAA) conducted the Mediascope Europe Media Consumption Study in seven European countries, including Spain, and claimed that the Internet surpassed television as an entertainment medium among the Spanish audience aged

between 16 and 24. Indeed, '43% of them watched programmes online, overtaking young Europeans who stay at 30%' (EIAA 2007). Furthermore, the 3rd edition of the Deloitte report, 'The State of the Media Democracy' (2009), found that people between 14 and 25 consumed 10.5 hours of television per week in 2008. According to the 4th edition of this report (Deloitte 2010), young people in this age group were the ones who increased television consumption the most in 2009 (to fifteen hours per week). This trend stabilized in 2010.

These studies suggest that young people have not stopped watching television, but have, rather, changed the platforms on which they consume it. As Reinares (2010: 73) points out,

While it is true that young people show a lower consumption of television and a higher consumption of Internet in comparison to the general population, we should not assume that there are excluding relations between both media. On the contrary, there are reasonable indications that, at least amongst young people, Internet and television are complementary media.

To support his argument, Reinares compared the data on young people's television consumption in 1999 – when the penetration of the Internet in Spain was still low – with data from 2008 – when the presence of the Internet was already strong. The result was that in that decade television consumption had declined only by eleven minutes.

It has been suggested (López 2008: 57) that Spanish youngsters prefer multimedia and interactive content, demand to have an active role in content-related participation and choose their PC/laptop not only as a platform for entertainment, but also as a television screen. Carpentier has stated that the current generations demand 'a different type of television' that produces abundant fiction, film, humour and sports; and also television that allows them to interact through a variety of channels (mobile phones, the Web etc.) and gives them the opportunity for 'participation', understood as 'any activity that involves individuals in any form of communication with media, including playful activities with no clear societal purpose' (Carpentier 2007: 154). But as the same author points out, participation is not enough: 'participatory practices are not unconditionally appreciated by audience members' and have to be complemented by two key traditional concepts, 'professional quality and social relevance' (2009: 407–08). Indeed, Carpentier (2009: 409) makes the point that 'in most cases, the participatory nature of these receptions (however active they may be) is relatively limited and one may wonder whether the term (mediated or symbolic) interaction, is not more appropriate'.

Carpentier (2009: 411) further states that 'participatory media theory has the tendency to isolate the concept of participation, and to ignore the conditions of possibility of its relevance, appreciation and significance'. These participatory practices are also limited because professional media still maintain a high degree of control by setting the agenda, choosing the participants and moderating the conversation in some forums.

Indeed, these youngsters, as non-professional content producers, demand more intense and 'maximalist forms of participation', described by Carpentier (2009: 409) as those 'where non-professionals are effectively involved in the mediated production of meaning (content-related participation)'. Carpentier (2009) himself carried out research based on two case studies about the reception of two north Belgian participatory media products, related to the

public broadcaster VRT. One of them was the online video-sharing platform *16 plus*, on which nine films produced by inexperienced non-professionals were analyzed; and the other a 2002 professional television programme called *Barometer*, with thirteen episodes based on video-letters, produced by non-professionals but edited by the production team. The aim was to evaluate participatory practices by means of a focus group, and compare the participatory potential of 'new' (*16 plus*) and 'old' (*Barometer*) media. According to the results, in both cases the two key traditional concepts mentioned above – professional quality and social relevance – were important for the audience's reception (Carpentier 2009: 408). Focus group respondents evaluated the 'amateur' films as offering 'a more realistic and authentic perspective on everyday life', whereas 'the mainstream are seen to offer a poor perspective on reality and are deemed manipulative' (Carpentier 2009: 417).

Both groups of respondents were of the opinion that 'mediated participation is not enough for a programme to be evaluated positively' (Carpentier 2009: 418). The use of aesthetic, narrative and technical languages is also required, as are stories that are socially relevant.

Another aim of this research is to assess the extent to which Spanish youngsters have turned to new media as a source of entertainment. It has been noted that with new media, audiences take the initiative in searching for content through the Web or mobile phones, which results in a type of a consumption that is more adapted to their leisure time and particular tastes. In early 2009, a Deloitte study stated that 59% of 14–25 year olds used mobile phones as a means of entertainment, and spent more and more time surfing the Internet. Even though youngsters used mobile phones for entertainment purposes and increasingly download audio-visual content on them, in Spain, however:

The consolidation of mobile television is subjected to the commercial interests of the mobile operators. Unlike other countries – like Germany, Korea and Japan, where free television via mobile phone is highly popular – television content in Spain relies exclusively on payment models. Given that the terminals are largely financed by them, mobile operators are not interested in opening a window of consumption that does not benefit them and can reduce traffic in their main business.

(Arnanz and García 2010: 116)

The investigation was carried out by means of a personal survey which included a questionnaire with twenty questions – three open and seventeen closed questions (see Appendix). This survey was handed out to more than 2000 respondents between 14 and 25 years of age, subdivided into two age sub-segments:

- 14–17 (adolescents)
- 18–25 (young people)

The results of the survey for the two age groups will be presented and analyzed individually and comparatively with the aim of identifying the following:

- a) indicators of television consumption preferences in young audiences;
- b) differences between the two groups;
- c) the reasons why some formats are preferred and others rejected.

The first group (adolescents) was made up of secondary school students and the second of university students.² The separate study of the 14–17 age segment acknowledges the key importance of this group in shaping the future consumption of audio-visual products, as they are growing up in the so-called ‘digital revolution’ and the constant introduction of new communication technologies. As stated in the Injuve study on ‘Adolescents and young people in the network: Opportunity factors’, led by Ángeles Rubio et al. (2009: 15), adolescence is a formative phase in which youngsters deal with new experiences that will shape their values. It is also a period in which individuals are most sensitive to informal socializing agents, particularly to communication media such as the Internet (see also Kaplan 1986; Lehalle 1986; Osuna 2008; Perinat 2003). They constitute, therefore, the key target for new audio-visual products and media platforms.

2. For more details, see <http://www.ocendi.com/estudios/consumo-tv-14-25/>.

Thus the findings and discussion of this study are not only important from a sociological and academic point of view; they also point to trend indicators and guidelines that advertisers and media companies might be interested in taking into account when designing new creative and innovative television content.

Stages and methodology of the study

The research was carried out between 2009 and 2011 in the following consecutive stages:

- 1st stage (2009): research design; data collection from the sample of 18–25 year olds; and evaluation of results
- 2nd stage (2010): data collection from the sample of 14–17 year olds and evaluation of results. Study of differences to the sample of 18–25 year olds
- 3rd stage (2011): interviews with experts; evaluation and final report

The study uses a quantitative methodology, which allows data to be obtained by cross-analyzing several discrete items. The aim of the quantitative analysis was to find out the following attitudes in television consumption: most popular time slots for young audiences; usual places for watching television programmes; preferred media platforms for watching television; young people’s opinions about today’s television; ideal television programme model; favourite television formats; preferred television networks (state-owned, private, pay TV channels). Ninety-five per cent of the surveys were carried out face to face, whereas 5% were answered electronically. The results were collected on a database.

The subjects were chosen according to a number of variables: age, place of residence (Autonomous Community; rural/urban), level of education and social background. The largest percentage of surveyed students came from Andalucía, Madrid and Catalonia (as samples were in keeping with the proportional share of the overall population). Also, most participants lived in nationally representative cities (those with more than 10,000 inhabitants), as more than 70% of the Spanish population lives in cities with a population of between 10,000 and 500,000 inhabitants. Apart from the regional population variable, another factor was the number of universities and students in the region. ‘According to figures from Eurostat (2010), more than three-quarters (76.7%) of young students from Madrid between the ages of 20

and 24 complete their higher education studies' (EsporMadrid 2010), which places Madrid as the leading region of Spain in terms of university population, ahead of Catalonia (55%) and Andalucía (51%). During the school year 2009–10, there were 300,000 university students living in Madrid. Since those young people come from both public and private institutions, the sample also represents different social statuses.

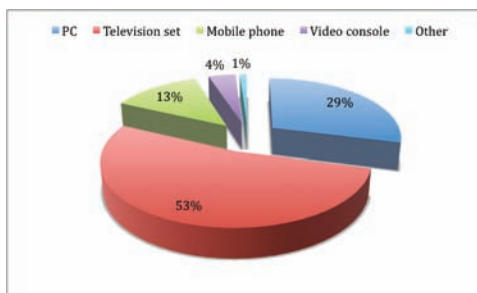
The qualitative phase of the study, for which a Delphi panel was set up, was carried out in 2011. This article, however, focuses only on the results obtained in the quantitative stage.

CHANGING CONSUMPTION HABITS

With regard to consumption habits (Appendix, Questions 8–18), the survey confirms that young people – in both age groups – have not abandoned television, but that the way they consume television products is changing. In terms of watching times, the bedroom culture and the 'privatization' of so-called digital entertainment have become the dominant reality. According to the results of our research (Question 8), young people watch television especially at night. The most popular time slot for the audience of between 18 and 25 year olds (47%) is undoubtedly the evening, more precisely between 22:00 and 24:00. The second most popular time slot (20%) is between 14:30 and 17:00. In percentage terms, the 22:00–24:00 slot is slightly less popular among viewers aged between 14 and 17 (34%). Their second most popular time slot (24%) is between 20:00 and 22:00.

In terms of location (Question 11), the usual place for television consumption between 18 and 25 year olds is still the family home together with their family (28%) (Appendix, Question 15). However, there are signs that this habit, inherited from past generations, is beginning to change (Question 16), as 18% of interviewees aged 18 and 25 and 23% of those aged 14–17 usually watch television by themselves. And as responses to Question 16 show, the proportion of 18–25 year olds expressing their preference for 'individualized consumption' of their favourite television programmes – that is, by themselves – is 41%.

In terms of medium (Question 13), as Figure 1 shows, 53% of those between 18 and 25 interviewed for this research stated that the television set was their preferred platform for watching television programmes. Twenty-nine per cent preferred their laptop/PC, which continues its rising trajectory. Trailing behind, mobile phones were preferred by 13% – a medium which,



Source: OCENDI (January 2011) <http://www.ocendi.com/>

Figure 1: Preferred media for watching television (18–25 year olds).

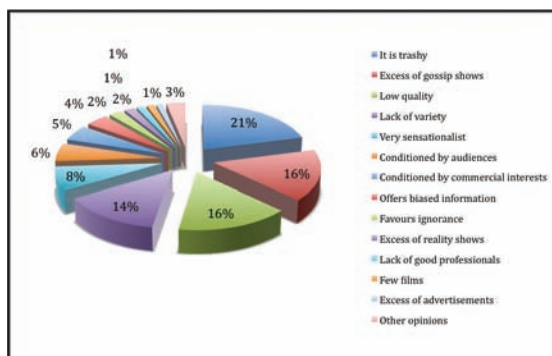
unlike in other countries such as Germany or Japan, is not growing in popularity for this use.

Our investigation also shows (Question 9) that three private networks – Antena 3 (16%), La Sexta (18%) and Cuatro (19%) – are regarded as more successful in designing and producing television programmes for young audiences, well ahead of the national state-owned channels, TVE1 and La 2. Adolescents (14–17 year olds) watch more pay TV channels: Digital+ was preferred by 6% (4% among 18–25 year olds), and 7% opted for open-to-air DTT.

CURRENT TELEVISION CONTENT: YOUNG PEOPLE'S ASSESSMENT

The results of the surveys, including three open questions (Appendix, Questions 10, 19 and 20), provided young people's appraisal of the current content of the different television networks. As Figure 2 shows (Question 19, dealing with young people's opinions about today's television), young people aged between 18 and 25 believe that despite the increasing range of television channels as a result of the introduction of DTT, they remain generally disappointed. Most young people stated that they find conventional television less and less attractive because (among other reasons): (a) it exploits the use of gossip shows (16%) (known in Spain as *programas del corazón*); (b) television content is 'low quality' (16%) or even 'trashy' (21%); (c) there is a lack of variety (14%); (d) it is too sensationalist (8%); and (e) programmes are too influenced by audiences (6%) or (f) too dependent on the advertising companies that fund them (5%).

A number of respondents had strong opinions about the layout of the programme grid. With regard to the tendency to relegate fictional programmes and films to late-night schedules, one respondent said, '[M]ost of the best North American and Spanish produced fiction is broadcast late in the evening and that makes it difficult to be watched on a regular basis by young viewers'. Regarding the excess of commercial advertising, an interviewee replied, '[T]here is a huge number of adverts during entertainment programmes, which interrupt them many times and at short intervals'. A common complaint was the lack of good television hosts and presenters, and intelligent programming containing relevant interviews with experts and professionals rather than celebrities. This was the opinion of one of



Source: OCENDI (January 2011) <http://www.ocendi.com/>

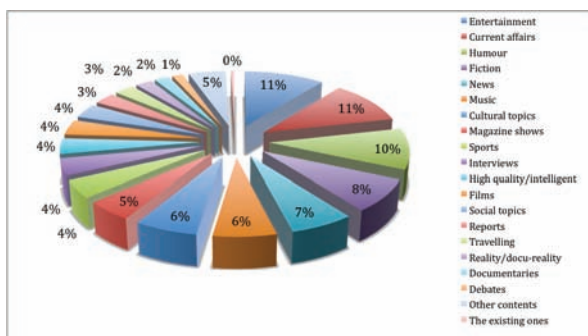
Figure 2: Young people's opinions about today's television (18–25 year olds).

the respondents: ‘TV hosts are always the same on several programmes. Presenters are not professionals, they are not journalists either; nor are their collaborators; they are always pseudo-celebrities’. On the lack of variety of programmes and the disappointment at DTT, one interviewee had this to say: ‘[T]he arrival of DTT and a greater number of channels does not correspond to greater variety. The content of their programmes are a mere repetition of those broadcast on conventional channels’. Another common complaint was the clash of similar programmes at the same time. One interviewee said, ‘[M]y preferred dramedies are shown on the same day and at around the same time. If I decide to watch *House* I can’t watch *Hospital Central* [also a doctor-centred show]’. Finally, a repeated observation was the absence of interviews, debates and current affairs programmes aimed at and made by young people. A youngster said,

[T]here are no programmes for the young including current affairs that we might be interested in, and expressed in language that is close to us. And the same can be said about children’s shows, which are not made for them.

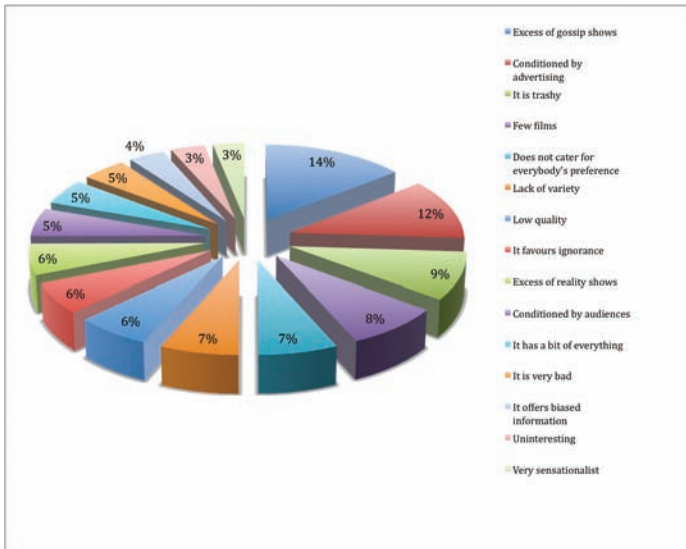
The survey also included questions aimed at finding out young people’s ideal television content and programmes (Question 10) and what should be changed in the current programme schedules (Question 19). It is interesting to note that some of the types of contents most valued by the 18–25 group in an ‘ideal’ television model (Figure 3) are entertainment (mentioned by 11% of respondents), current affairs (11%), humour (10%), fiction (8%), news (7%) and music (6%). It is worth emphasizing the desire for quality content, with cultural programmes and magazine shows (a mixture of news, documentary, drama and interviews) chosen by 6% and 5% of respondents, respectively. As an indictment of the current state of affairs, less than 1% enjoys the programmes currently shown on television.

The model of television programming with entertainment, current affairs and humour is called *El intermedio* in Spain. This programme is an info-show that combines ironic political comment, sarcastic remarks about current affairs and grotesque impersonation of politicians and celebrities. The format is very similar to *CQC* (*Caiga quien Caiga* in Spain, *La lene* in Italy, *Les Hyènes* in France, *Caia quem Caia* in Portugal and *Koste wat het kost* in Holland).



Source: OCENDI (January 2011) <http://www.ocendi.com/>

Figure 3: Ideal television programme model for 18–25 year olds.



Source: OCENDI (January 2011) <http://www.ocendi.com/>

Figure 4: Young people's opinions about today's television (14–17 year olds).

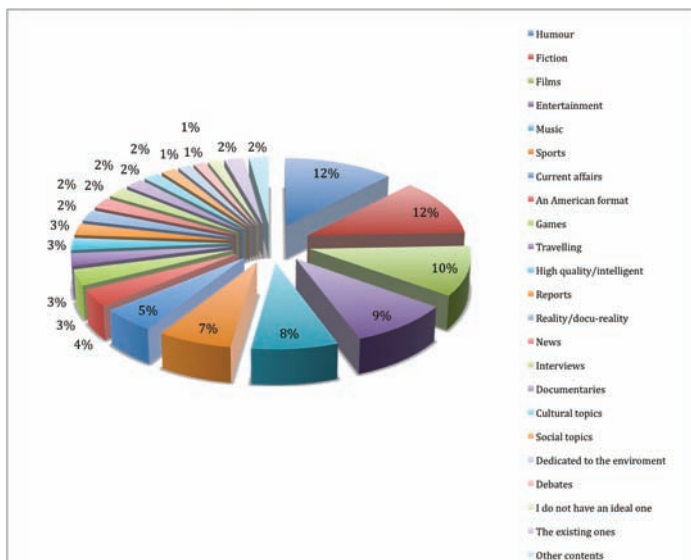
The results of the surveys seem to contradict the widely accepted idea that the new generations do not care about current affairs, as a good proportion of those interviewed in this age group expressed a desire to have content focused on 'current affairs' and 'news' (18%). Moreover, Spanish young people seem to be in tune with their counterparts in other European countries. Indeed, these results confirm the findings of Irene Costera Meijer³(2006: 3) in her research on the media experiences of 450 individuals between 15 and 25 who live in the Netherlands:

Young viewers may be hungry for news but that this is not satisfied by the ways in which news is currently offered on television [...] This could be countered, several critics have claimed, by presenting news in more coherent ways or in more appealing formats [...] Being fun and being educational do not necessarily exclude each other [...] In the Netherlands, more than one out of three in the age group 15–17 and more than one of two in the age group 18–24 report that they follow the news on a daily basis.

The views of the 14–17-year-old group largely coincide with the opinions of the 18–25 year olds previously listed; however, they tend to be less negative in their opinions about the state of television nowadays. As responses to Question 19 of the survey shows (Figure 4), 5% consider that it has a bit of everything; 14% think that contemporary television has an 'excess of gossip shows'; 9% think it is 'trashy'; for 12% it is 'conditioned by advertising'; and for 8% there are too few films – significantly higher than the 1% in the other age group.

As Figure 5 shows, for adolescents the key ingredients of an 'ideal programme' (Appendix, Question 10) would have to include the following: humour and fiction (12%), films (10%), entertainment (9%), music (8%) and

- Her study, titled *The Paradox of Popularity: How Young People Experience the News*, covers the media experiences of 450 individuals aged 15–25 who live in the Netherlands and come from a variety of cultural and educational backgrounds. Specifically, her argument is based on data derived from 239 in-depth interviews, 148 news biographies and 65 online questionnaires that directly and indirectly address their patterns of information consumption.



Source: OCENDI (January 2011) <http://www.ocendi.com/>

Figure 5: Ideal programme model for 14–17 year olds.

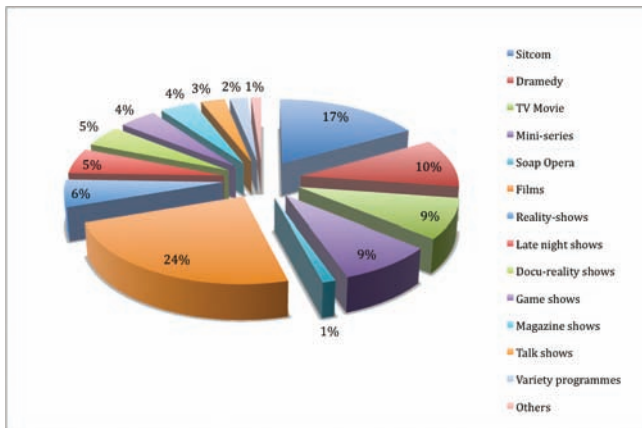
sports (7%). For 7% they would include current affairs and news (5% and 2% of respondents respectively) – a very low figure compared to the 18% (11% and 7%) of older respondents, which indicates the lack of interest in current affairs among the younger group. The level of dissatisfaction with the current television offer is evidenced by the meagre 2% who ticked the ‘existing programmes’ box.

It is worth pointing out that, as the previous figures show, entertainment, humour and fiction stand out as the fundamental ingredients of the type of television desired by the so-called Spanish millennials (both segments surveyed). As will be shown next, these results match their responses to their preferred television formats.

FAVOURITE FORMATS: SERIES AND MOVIES

Gloria Saló points out that ‘format’ could be defined as the ‘concrete development of a series of audiovisual elements and contents that make up a particular programme and differentiate it from others’ (Saló 2003: 13). In Spain television formats do not differ from those of the rest of Europe, which include sitcom, soap opera, dramedy, mini-series and TV movies; however, a good number of young Spaniards do not differentiate between fiction formats but tend to group them all within the general category of television ‘series’ (Padilla and Requeijo 2010: 191–92; Saló 2003: 173–74). That is the reason that in the survey examples were given next to each format: sitcom (*Camera Café, Aida*), mini-series (*Padre Coraje*), TV movie (*No estás sola*), soap opera (*Al salir de clase*), dramedy (*House*).

As the analysis of the survey suggests, respondents aged between 18 and 25 prefer fiction programmes (70%): 46% chose TV series – 17% sitcom, 10% dramedy, 9% TV movie, 9% mini-series, 1% soap opera – and 24% chose films. For the sake of clarity, we can create two categories here: films (i.e.,



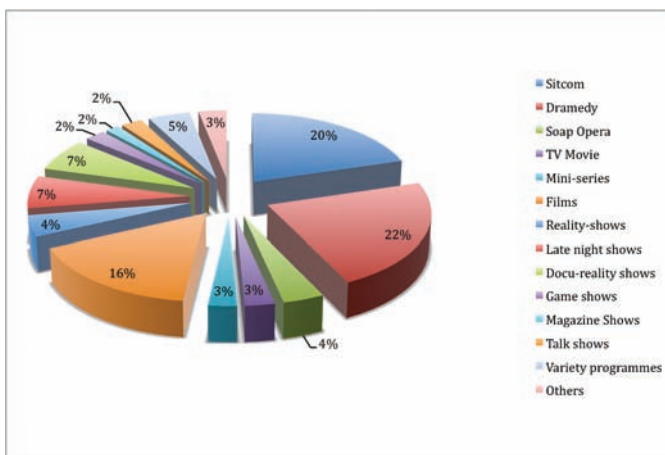
Source: OCENDI (January 2011) <http://www.ocendi.com/>

Figure 6: Television formats preferred by 18–25 year olds.

feature films made for cinema theatres that might or might not be shown on television) and TV movies (made specifically to be shown on the screen). This distinction is not only appropriate from an analytical point of view, but may also help television producers get to know young viewers' preferences.

As Figure 6 shows, sitcom (17%) and dramedy (10%) are the preferred formats of television series for young people, while non-fiction formats preferred by 30% of respondents (6% reality-shows, 5% late-night shows, 5% docu-reality shows, 4% game shows, 4% magazine shows, 3% talk shows, 2% variety programmes, 1% others) trail behind. Late-night talk shows (such as *Buenafuente*) are the preferred format of 5% of those interviewed within this age group, and game shows were mentioned by just 4% of respondents.

Fiction programmes (68%) are also the preferred format among 14–17 year olds (Figure 7): 52% chose TV series – 20% sitcom, 22% dramedy, 3% TV



Source: OCENDI (January 2011) <http://www.ocendi.com/>

Figure 7: Television formats preferred by 14–17 year olds.

movie, 3% mini-series, 4% soap opera – and 16% chose films. And as Figure 7 shows, the sitcom (20%) and dramedy (22%) are the preferred formats of TV series among adolescents. In this age group, the option of films (16%) trails behind, compared with the 24% ticked by the young people group. Non-fiction formats (32%) also lag behind. In both age segments, dramedy and sitcom are the preferred television formats.

These results seem to point to the fact that even though there has been an increase in ‘reality show’ production, and even though ‘reality shows’ offer a good degree of entertainment and the possibility of interaction, young audiences still prefer purely fiction formats.

These results confirm the findings of García et al. (2004), which showed that TV series and films were the preferred formats for Spanish youth between 13 and 18. The findings of our survey might also help explain why TV series (*Física y Química* and *El Barco*, for instance) are currently among the most profitable television formats produced in Spain, so much so that over 400 media companies (Arnanz and García 2010: 54) are devoted to the production of this kind of programmes. In terms of profitability, TV series are followed by Spanish versions of Latin American *telenovelas* (such as *Gavilanes*, the Spanish version of *Pasion de Gavilanes*). Thirdly, there is also a significant successful and profitable production of TV movies (such as *No estás sola* or *Felipe y Letizia*), some of which have verged into the risky territory of the thriller (*11-M*, *Alakrana* or *El Asesinato de los Marqueses de Urquijo*, to name a few).

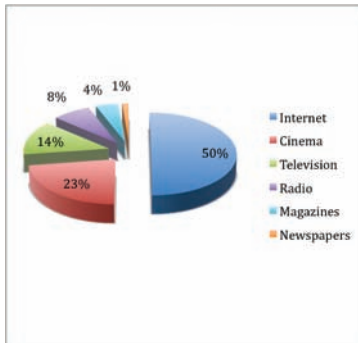
INTERNET: PREFERRED ENTERTAINMENT MEDIUM AMONG 14-17 YEAR OLDS

The findings of the survey further establish that even though interviewees are increasingly deserting the television model they have inherited, there is still a reasonable proportion of them who regard this medium as a good source of entertainment (Appendix, Question 18) – 14% among 14–17 year olds (Figure 8) and 15% in the case of the 18–25 year olds (Figure 9). However, the top position is presently occupied by the Internet, which proves to be the preferred ‘entertainment medium’ (50%) for those in the 14–17-year-old group. This figure is twice as high (at 26%) as among respondents in the 18–25-year-old bracket, as Figure 9 shows.

Figure 9 also shows that older contestants turn to radio (14%), magazines (12%) and newspapers (13%) for their entertainment in equal proportions.

It is worth pointing out the clear difference between the two groups in terms of their relationship to newspapers as a source of entertainment. This option was ticked by only 1% of the 14–17-year-old group, as opposed to 13% in the older group. Other forms of print media replicated the same trend, as magazines were identified as a source of entertainment by just 4% of 14–17-year-old teenagers – four times more popular than newspapers but still a very low figure. Young adults (those between 18 and 25) chose newspapers and magazines in almost identical proportions – 13% and 12% respectively.

This divergence also applied to radio, as almost double the number of young adult respondents said that they turned to this medium for leisure and entertainment (14%), compared to 8% of the teen sample. Cinema, however, had similar relevance for respondents in both age segments: 23% among 14–17 year olds and 20% among the older group. The unchangeable and unconditional appreciation of young people for national and international cinema is revealed by respondents’ demand for an increase in the number of



Source: OCENDI (January 2011) <http://www.ocendi.com/>

Figure 8 Favourite entertainment medium (18–25 year olds).

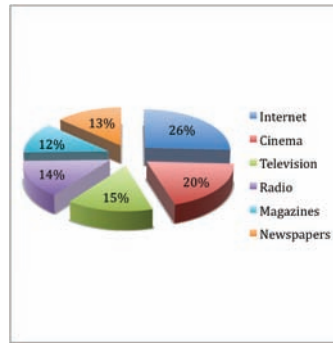


Figure 9 Favourite entertainment medium (14–17 year olds).

films included in the television offer, and the fact that many of them selected 'films' as their favourite 'format': 24% of 18–25 year olds (Figure 6) and 16% of those in the younger group (Figure 7).

The percentage of respondents choosing television as a source of entertainment was also almost identical in both groups: 15% among 18–25 year olds and 14% of 14–17 year olds. The findings show that young people are abandoning traditional media such as radio and the press as the preferred sources of entertainment, focusing their options on the Internet, cinema and television.

CONCLUSIONS

This article has outlined the quantitative results of a research project aimed at analyzing the television consumption preferences of young Spanish audiences aged between 14 and 25 years, and the differences between the two groups into which the respondents were divided: 14–17 and 18–25. The findings show clear new trends in the consumption of audio-visual content and might serve as indicators of future tendencies among the youngest sectors of society. These results show that although television has not lost its relevance among young Spaniards, a good number of them are abandoning it as their preferred entertainment medium in favour of the other emerging medium – the Internet. These findings validate previous studies. As Reinares pointed out, young people have not stopped watching television, but rather have changed the platforms on which they consume it. Indeed, one of the most groundbreaking results that should be highlighted here is the difference between the two groups in their approach to the Internet as a source of entertainment – 50% among 14–17 year olds and half this percentage (26%) in the older group. The figures show that in a matter of two to three years this percentage increased among the younger group. Indeed, the Mediascope Europe Media Consumption Study (EIAA 2007) stated that 43% of Spanish adolescents chose the Internet as their preferred media.

The use of the new audio-visual platforms confirms digital convergence and the possibility that these new media may play a complementary role to television. The answers provided by the sample of young Spaniards regarding consumption habits confirm the results of previous studies showing that they

also choose online streaming to watch television. The results about the use of mobile phones for entertainment purposes also confirm Arnanz and García's findings, in the sense that only 13% of young people choose mobile phones as their preferred platform for watching television, unlike in Germany or Japan.

The comparative analysis of the two age groups pinpoints some differences and trends in television consumption: 95% of the youngest group mentioned audio-visual media (Internet 50%, cinema 23%, television 14%, radio 8%) as the preferred source of entertainment, which is a percentage significantly higher than the 75% (Internet 26%, cinema 20%, television 15%, radio 14%) among 18–25 year olds. Print media – that is, newspapers and magazines – seem to be the losers in the new map of media consumption among the youngest group (14–17 year olds). These results are a clear indication of the younger generations' preference for audio-visual media to keep them up to date with news and current affairs.

The findings also seem to show that this generation is demanding that television content be adapted to new platforms – such as the Internet or mobile phone – and that there should be innovation in the development of formats to make them more interactive (inviting the audience to play and socialize) and more 'participatory'. This implies a consideration of young audiences as new content producers.

In terms of the television offering, the group of young Spaniards surveyed and interviewed for this project seem to reject current programming on the grounds that it lacks variety; according to them, it is sensationalist and relies too heavily on gossip shows. In terms of content, they suggest the inclusion of more humour, current affairs and entertainment shows, among others. The choice of current affairs seems to challenge the clichéd image of young people as a group not interested in the news, or in other programming supposedly addressed to minority audiences.

These results confirm the findings of Irene Costera Meijer (2006: 20–21) in her research on the media experiences of young people. Indeed, the current generation demands a 'different type of television', full of fiction, films, sport and humour. Their preferred television formats are dramedy and sitcoms, confirming the findings of García et al. (2004: 149–52) showing that TV series and films were the preferred formats for Spanish youth from 13 to 18 years of age at the beginning of the 2000s.

Young people seem to favour private channels, more specifically Antena 3, La Sexta and Cuatro. Within the 14–17-year-old group in particular, the offer of open-to-air DTT (7%) and pay TV channels (6%) also makes a significant appearance in the list of preferences. It is worth mentioning that the latter, despite having reached a good position, are regarded by many youngsters as still lacking in content variety in comparison to conventional television. Faced with the new model of television – that is, interactive hyper-television – young consumers seem to be asking for a more 'personalized' content: that is, programmes designed for young people and presented by young hosts about topics that reflect their interests. As the results of the survey show, individualized television consumption is also a priority for a good number of the young people surveyed, with 41% of them stating that they like to watch their favourite television programmes by themselves.

Furthermore, the results of our survey seem to point out that contemporary television is still in a continual process of transformation and has not yet met the aims of the model of 'enriched broadcasting': that is, the capacity to offer an interactive experience involving a wide range of complementary information

and entertainment activities – the truly ‘enhanced content navigation’ that the ‘digital generation’ seems to be demanding.

In order to attract the new digital generation or millennials, media companies would need not only to adapt content to the new digital media, but also and especially to adapt their content to the preferences and tastes of young people who, as this research reveals, are changing their consumption habits and are turning to the Internet as their preferred entertainment medium. As López points out, ‘the producers will have to have talented teams to somehow reinvent the entertainment genres’ (López 2008: 57) and, furthermore, will need to present current affairs and related topics in a format and language that youngsters find familiar, relevant and appealing.

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APPENDIX:**1. WHAT TELEVISION FORMATS DO YOU NORMALLY WATCH?**

Docu-reality shows (Curso del 63)		Magazine shows		Documentaries	
Reality shows (Gran Hermano)		Soap opera (Al salir de clase)		Infocommercials (La tienda en casa)	
Mini-series (Padre coraje)		Talk shows (El diario de Patricia)		Films	
TV movie (No estás sola)		Sitcom (Camera café, Aída)		Others	
Game shows		Late night talk shows (Buenafuente)			
Dramedies (House)		Containers (Megatrix, En construcción)			

2. WHICH ONES DO YOU PREFER?

Docu-reality shows (Curso del 63)		Magazine shows		Documentaries	
Reality shows (Gran Hermano)		Soap opera (Al salir de clase)		Infocommercials (La tienda en casa)	
Mini-series (Padre coraje)		Talk shows (El diario de Patricia)		Films	
TV movie (No estás sola)		Sitcom (Camera café, Aída)		Others	

Game shows		Late night talk shows (Buenafuente)	
Dramedies (House)		Containers (Megatrix, En construcción)	

3. WHAT FORMATS DO YOU THINK THERE SHOULD BE MORE OF ON TELEVISION?

Docu-reality shows (Curso del 63)		Magazine shows		Documentaries	
Reality shows (Gran Hermano)		Soap opera (Al salir de clase)		Infocommercials (La tienda en casa)	
Mini-series (Padre coraje)		Talk shows (El diario de Patricia)		Films	
TV movie (No estás sola)		Sitcom (Camera café, Aída)		Others	
Game shows		Late night talk shows (Buenafuente)			
Dramedies (House)		Containers (Megatrix, En construcción)			

4. HOW LONG WOULD YOU LIKE THEM TO BE?

5-10 min		30-40 min	
10-20 min		40-60 min	
20-30 min		More than 60 min	

5. CONTENTS: WHAT TOPICS SHOULD PROGRAMMES DEAL WITH?

Leisure		Relationships	
Travel		Information	
Videogames		Sports	
Sex		Current Affairs	

6. WHAT ELEMENTS DO YOU THINK THAT SHOULD ALWAYS BE INCLUDED?

Music		Opinions	
Photographs		Interviews	
Fiction		Information	
Accidents/ crimes		Internet access	

7. CUÁLES SON TUS GÉNEROS FAVORITOS?

News shows		Films	
Music shows		Opinion shows	
Magazine shows		TV fiction	
Cultural shows		Entertainment	

8. WHEN DO YOU WATCH TELEVISION?

09:00-12:00		22:00-24:00	
12:00-14:30		24:00-06:00	
14:30-17:00		06:00-09:00	
17:00-20:00		I Don't watch TV	
20:00-22:00			

9. WHAT ARE YOUR FAVOURITE TV CHANNELS?

Tele 5		Digital +		Other cable channels	
TVE1		La sexta		Other digital channels	
TVE2		Autonómica/ Regional TV			
Antena 3		Local TV			
Cuatro		Other DTT channels			

10. WHAT WOULD YOUR IDEAL PROGRAMME BE LIKE?

11. WHERE DO YOU NORMALLY WATCH TELEVISION?

At home	
At works	
At university	
At a friend's house	
Other	

12. WHERE WOULD YOU LIKE TO WATCH TELEVISION?

At home	
At works	
At university	
At a friend's house	
Other	

13. ON WHAT PLATFORM WOULD YOU LIKE TO WATCH TELEVISION?

PC	
Television set	
Mobile phone	
Video console	
Other	

14. ARE YOU INTERESTED IN RECORDING A PROGRAMME IN ORDER TO WATCH IT LATER?

Yes	
No	

15. WHO DO YOU NORMALLY WATCH TELEVISION WITH?

Family		On my own	
Friends		Boyfriend/girl- friend	
Others			

16. WHO WOULD YOU LIKE TO WATCH YOUR FAVOURITE PROGRAMME WITH?

Family		On my own	
Friends		Boyfriend/girl- friend	
Others			

17. WHAT OTHER MEDIA DO YOU USE FOR ENTERTAINMENT?

Radio		Television	
Newspapers			
Magazines			
Internet			
Cinema			

18. WHAT IS YOUR PREFERRED PLATFORM FOR ENTERTAINMENT?

Radio		Television	
Newspapers			
Magazines			
Internet			
Cinema			

19. WHAT DO YOU THINK OF TELEVISION PROGRAMMING IN GENERAL?**20. WHAT DO YOU THINK THAT SHOULD BE CHANGED?**

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