

# Convergence of linear television and digital platforms: An analysis of YouTube offer and consumption

[ACCEPTED VERSION]

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## Abstract

This research studies the offer and consumption on YouTube in Spain of videos from the three main media groups on free-to-air TV. Firstly, a study of the offer of these channels' onset platforms was conducted. Later, the audience data gathered by Comscore between January and March 2020 was analyzed to ascertain the traditional broadcasters' strategy regarding new viewing windows. The results indicate that this window display is used mainly as a promotional strategy and the channels do not consider it to be a key element in their digital strategy, with practical nonexistence of crossmedia initiatives and exclusive content. The consumer analysis permits definition of the TV content, its success and user patterns.

**Keywords:** digital video, audience, television, YouTube, digitalization.

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## 1. Introduction

The process of the convergence and digitalization of the media has established audiovisual consumption patterns which differ from traditional ones. Progressive abandonment by young people of linear consumption and the fierce competition from over-the-top (OTT) media services drive the traditional television channels to seek new market strategies. The channels try to adapt to the new media ecosystem by opening new viewing windows such as social networks, apps or YouTube.

After several business operations aimed at concentration, carried out after the analogue switch-off (2010), the Spanish television system became dominated by a duopoly formed by two business groups: Atresmedia and Mediaset España (the largest operator in Spain). Both groups constitute 54.8% of the Spanish audience and 85% of the advertising investment (Barlovento, 2021). In this scenario, the public corporation RTVE has been losing its capacity to attract audiences (15.4% annual audience share in 2020) until reaching historic audience lows that demand an urgent rethinking in the performance of its functions.

The research seeks, firstly, to detect the presence of Spanish open-access television channels on YouTube, in order to assess to what extent they have taken advantage of the new possibilities for diffusion of content within a process of convergence. The study of the connection between YouTube and the linear television channels is carried out at several levels: an analysis of the offer; and an analysis of consumption by the public. In this way we analyze to what extent television outside the TV set has grown in Spain, a country with historically high television consumption.

### 1.1. Television panorama

In the last few years, the exponential growth of streaming providers (Spilker and Colbjørnsen, 2020) such as Netflix, Hulu, Amazon Prime, and YouTube has had a decisive influence on the European television sector (European Audiovisual Observatory, 2019). Within this ecosystem, the main media groups have lost their monopoly and coexist in the market with very different new agents, such as hardware and software producers, online stores, OTT, or online video aggregators (Andò and Marinelli, 2018). We share the idea of Tana et al. (2020: 109) that the new OTT, OVD or VoD services “have established themselves strongly in the digital media market, and are on their way to becoming mainstream and even replacing old media consumption habits.”

In a post-television context (Lotz, 2014) like the current one, the users decide what, when and where to view audiovisual content regardless of the broadcaster type and time and geographical limits. This freedom has undoubtedly favored the success of the consumption of online videos. In this sense, the boom in the last few years of on-demand consumption must be stressed, as indicated by Johnson (2017), because it blurs the boundaries between linear/broadcast and non-linear/on-demand television (Andò and Marinelli, 2018).

The progressive phasing-out by the audience of linear channels, more marked in the younger age group (Bernal and Carvajal, 2020; Guerrero Pérez et al., 2018, Kalogeropoulos et al., 2016) has driven the media groups to find new strategies for audience loyalty beyond the TV set and for testing new viewer windows like the Internet or social networks (Van Dijck and Poell, 2015; Moe et al., 2016). As Andò and Marinelli (2018) point out, this means finding all the touchpoints with the consumers in this media ecosystem. In view of this scenario, the three major open-access television groups in Spain launched three platforms intended mainly for the young digital viewer: Playz (RTVE), Flooxer (Atresmedia), and Mtmad (Mediaset). In addition, the alliance with YouTube may be a new business direction for traditional television. In fact, for Ha (2018), YouTube is truly seen as an alternative to traditional television for this age group.

However, this convergence process has been bidirectional; as stated by Kim (2012), the television channels approached YouTube, just as YouTube became institutionalized in approaching the media companies. Since 2008, the media companies have seen this platform as a tool for promotion (Del Campo and de Lara, 2016).

Thus, YouTube has become yet another piece in the crossmedia framework of some television productions which lead the viewer beyond the TV towards other platforms or social networks (De Lara and Arias, 2015). Thus, we can find television content which, years ago, was confined to the TV screen. A perfect example of this is the TVE talent show *Operación Triunfo* which has, as we shall see, its own channel on YouTube that broadcasts live 24/7. In the case of Spain, this presence on YouTube is precisely the factor that increased the audience of *Operación Triunfo* 2018 galas by 200%. Undoubtedly, this fact shows the carryover effect brought about by this new viewing window for the traditional channels.

Moreover, recent experiences carried out by some of these media groups show that the broadening of viewing windows does not damage open access broadcasting. For example, Mediaset has signed agreements with Amazon Prime Video to broadcast some of its series before showing them on its TV channels, in the same way as Atresmedia has done with Netflix, giving new life to their fiction series like the successful *Money Heist*.

## 1.2. YouTube

In 2005, three young men from California, Chad Hurley, Steve Chen and Jawed Karim, created a platform with the initial objective of sharing videos. In less than one year, this site already had 50 million visits per day; its success was such that, in October 2006, it was purchased by Google. YouTube has become the main website for videos worldwide, and it comes in second place after Google with over one thousand million hours of video played and 1,900 million users per month.<sup>1</sup> Its lead role on the audiovisual market in Spain is also clear. According to the EGM (2020), it was the most visited site by Spanish Internet users during the first wave of 2020 when it had almost 27 million single viewers. In fact, according to Kantar Media (2019), Spain is the second greatest European

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<sup>1</sup> Data from YouTube's own website: <https://www.youtube.com/about/press>.

audience of YouTube, as 54% of Internet users connect to it once a day. YouTube makes up three quarters of the digital video consumption in Spain (Barlovento, 2020), where it is present in 8.7 million homes at least once per week (compared to the 5.9 million for other digital platforms such as Atresplayer and 4.84 million for Mitele).

One of the most characteristic traits of this AVoD (Advertising-based Video-on-Demand) service is its cooperative nature (Sádaba and Rendueles, 2016): any user can share their productions almost without limit, which proves the prosumer characteristic of current communication agents. However, little by little, traditional broadcasters have also begun to publish on YouTube; newspapers, radio and television stations are all present. The site, initially intended for the exchange of videos by anonymous users, originally had a stormy relationship with traditional television channels, which had certain misgivings about the new platform (Rodríguez-Ferrándiz et al., 2016) – there were even major legal disputes (Viacom in 2007; Mediaset España in 2008). However, in view of the success of YouTube, and following the maxim *if you can't beat them join them*, most of the broadcasters decided to sign agreements with YouTube and set up their own channels, “having faced the fact that if one of their fragments was online, it was preferable for them to be in control” (Antolín-Prieto, 2012: 553). Every day anonymous users were uploading fragments of television broadcasts, therefore the channels decided to contribute to the new platform in order to increase the control of the production and distribution of their television contents. In the case of Spain, RTVE was the first channel to launch its own YouTube channel in 2006, while in 2015 Mediaset España signed a collaboration agreement with YouTube. In this way, the initial user-generated content (UGC) began its coexistence with professionally-generated content (Vonderau, 2016; Lobato, 2016), to such an extent that for some authors such as Kim (2012) the institutionalization of YouTube occurred. In addition, this presence of professional producers is more interesting in terms of economic profit, as the cultural industries guarantee a reliable product for advertisers in comparison with the content of anonymous users. Kim (2012) even notes that “YouTube would become a model of an omnipresent online video library.”

YouTube has been analyzed from many diverse economic, communication and business perspectives, and has also proven to be a tool for the scientific community to understand the attitudes and behavior of consumers and audiovisual content producers (Orduña-Malea et al., 2020).<sup>2</sup> As Van Es (2020) states, YouTube has been the object of study of various academic research projects, such as Arthurs et al. (2018) and the monograph by Snickars and Vonderau (2009). It has been addressed from different perspectives such as participatory culture (Strangelove, 2011; Burgess and Green, 2018), from a political economy viewpoint (Abuljadail et al., 2018; Cunningham and Craig, 2017; Vonderau, 2016; Cunningham et al., 2016; Postigo, 2016; Wasko and Erikson, 2009; Andrejevic, 2009), through its influence on young audiences (Livingstone et al., 2014), within an algorithm studies context (Bishop, 2018; Rieder et al., 2018), user preferences (Paolillo et al., 2019), or the study of audience uses and gratifications

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<sup>2</sup> It should be noted that up to 2020, 9,343 indexed publications were identified on *Scopus* that contained the term *YouTube* or mention *YouTube.com* (Orduña-Malea et al., 2020).

(Steiner and Xu, 2020; Lavado, 2013). Likewise, various authors have studied formal aspects of the content offered on this platform, whose features contribute to the popularity of video, and the characteristics of the most viewed videos (Bentley et al., 2019; Altman and Jiménez, 2019; Bärtl, 2018; Figueiredo et al., 2011; Crane and Sornette, 2008). In our case, we address YouTube as a concrete example of media convergence based on the traditional television channels. In this sense, there are other contributions from earlier years referring to media contexts, such as those by Lobato (2016), del Campo and de Lara (2016), Murschetz (2016), Waldvogel (2007) and Gallardo-Camacho (2013).

## **2. Research setting**

### **2.1. Research questions**

The objectives of this research are: (a) to analyze a strategy for symbiosis between traditional television channels and the YouTube platform in Spain; and (b) to verify their impact on the audience, which means knowing how the audience responds and finding the characteristics of the most successful content.

Regarding the first objective, we study what type of content is offered by the main open-access television channels on YouTube and whether this is a transposition of already broadcast content or if there is exclusive content which diversifies the offer of this distribution window; whether the offer responds to a repository/archive strategy or a corporative/publicity communication window. The research addresses the second objective with the analysis of user behavior, evaluating the audience results by channel and content, identifying and classifying the most-watched videos by their subject matter, upload date, length and exclusive character. It presents a user profile on age, gender, access device, number of videos consumed per month, and minutes spent on the platform.

### **2.2. Data and method**

The research focuses on the three major Spanish audiovisual media groups, one public, RTVE,<sup>3</sup> and two private, Mediaset and Atresmedia, which have a 70.1% audience share of linear television in Spain (Barlovento, 2021). Using a multi-method approach, data collection was conducted in several steps. Firstly, we conducted a structural analysis of all YouTube TV accounts within our dataset by examining the following formal criteria: channels, sub-channels, incorporation date, views, subscribers, and published videos. The videos have been analyzed regarding their length and level of updating, and also

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<sup>3</sup> On linear television, RTVE has the following television channels: two generalist channels (La 1 and La 2) and three thematic channels (Clan, Teleduarte, 24H); Mediaset España also has two generalist channels (Telecinco and Cuatro) and five thematic channels (FDF, Divinity, Energy, Boing, Bemadtv); Atresmedia has two generalist channels (Antena 3 and La Sexta) and four thematic channels (Neox, Nova, Mega and A3series).

whether the material is exclusive or not, that is, whether it was broadcast previously by a linear channel, by the ‘mothership’ of the transmedia universe (Rodríguez-Ferrándiz et al., 2016; Jenkins, 2012). The data on offer across the 45 channels the three media groups have on YouTube was gathered in December 2019 (Annex 1).

In a second phase focusing on audience behavior, the monthly viewer data was gathered – between February and May 2020 – for the videos published by 19 YouTube television channels in Spain – from RTVE, Mediaset and Atresmedia: the most viewed proprietary channel for each group was selected together with those that reached 1% of the views of the main channel, based on the first sample as indicated in Annex 1. The video data (ID, title, date, stats) was gathered with an application programmed on Python using YouTube Data API. The total sample was of 108,512 videos which had accumulated a total of 1,313.9 million views.

Likewise, the data that Comscore – the multinational in charge of digital metering in Spain – offers in terms of digital video consumption through Videometrix,<sup>4</sup> was analyzed, in order to identify the user profiles in relation to age and access device.

### 3. Research findings

#### 3.1. Offer

The analysis shows that there are no parallels between the offer of these groups on linear television and their presence on YouTube. Also, each of the groups has adopted a different strategy for their YouTube offer. In the case of the RTVE public corporation, it has 17 channels and sub-channels (Table 1), among which one is conspicuous by its absence: La 1, the main RTVE channel and the group flagship. Nor does Teledeporte appear, and the news channel 24H joined later on March 18, 2020, as a result of the coronavirus crisis. Thus, the proposal on YouTube does not transpose the group’s existing channels, but rather is an amalgam of groupings of different types (formats, some successful programs like *Operación Triunfo* or *Espanoles por el mundo*, or the Playz platform).

What stands out is the active ongoing presence of the sub-channel for the talent show *Operación Triunfo*, which has more followers (972,000 on December 7, 2019) than the account of the RTVE channel itself (880,000 on the same date). This is also the only channel in the sample with live broadcasts together with the 24H channel.

Following the content analysis we find that the offer is not an exact transposition of the linear programming, but that there is a variety of content modalities. That is to say, the different RTVE accounts on YouTube present complete programs (very occasionally), short clips from a program, videos with exclusive content not shown on linear television

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<sup>4</sup> This Comscore tool obtains consumer data of digital video, both streaming and downloads, on smartphones, tablets and desktops, avoiding duplication.

(not many), or other broadcasts in 360-degree video, so the duration is extremely variable.

As regards updating, RTVE group carries out constant updates depending on the function of each of the subchannels (uploading at least five videos per day).

Table 1. List of RTVE group channels

| Channel                   | Description   | Linear TV | Subscribers | Views         | Videos |
|---------------------------|---------------|-----------|-------------|---------------|--------|
| RTVE                      | Group         | –         | 880 K       | 725,922,063   | 9,508  |
| Playz                     | Website       | No        | 173 K       | 45,155,828    | 924    |
| Clan                      | TV channel    | Yes       | 5.39 K      | 1,176,709     | 121    |
| Radio 3 Extra             | Radio station | No        | 21 K        | 10,415,336    | 551    |
| La 2                      | TV channel    | Yes       | 13.5 K      | 3,753,106     | 858    |
| RTVE Archivo              | Website       | Yes       | 18.5 K      | 892,954       | 308    |
| RTVE Series               | Website       | Yes       | 247 K       | 91,752,386    | 4,445  |
| RTVE Cocina               | Website       | Yes       | 45.7 K      | 3,960,633     | 789    |
| RTVE Humor                | Website       | Yes       | 9.57 K      | 2,763,785     | 341    |
| Inglés online TVE         | TV program    | Yes       | 24.3 K      | 3,240,479     | 923    |
| Operación Triunfo Oficial | TV program    | Yes       | 972 K       | 1,267,193,043 | 6,177  |
| Españoles en el mundo     | TV program    | Yes       | 36.7 K      | 8,940,086     | 609    |
| Nomadas RNE               | Radio program | No        | 1.93 K      | 256,058       | 63     |
| Abiertohastalas2          | Radio program | No        | 7.98 K      | 5,629,061     | 1,254  |
| TVE Catalunya             | Others        | Yes       | 1.04 K      | 104,013       | 231    |
| Instituto RTVE            | Others        | No        | 1.41 K      | 104,955       | 200    |
| MasterChef España         | TV program    | Yes       | 332 K       | 163,178,736   | 927    |

Compiled by the authors. Data from 7 December, 2019.

As with the RTVE group, Atresmedia does not include all its channels in its YouTube offer (Table 2). It comprises a very broad range of subchannels: TV channels (Antena 3 and La Sexta), platforms (Flooxer), some programs (*Antena 3 Noticias*, *La Voz Antena 3*, *El chiringuito de jugones*) or formats (telenovelas), with over 1 million subscribers. However, linear television channels such as Neox, Nova, Mega or A3Series are not included in their YouTube community.

It is remarkable that the Atresmedia general channel on YouTube has barely any audiovisual content (only 30 videos, compared to over 9,000 for RTVE). These videos are publicity clips less than 30 seconds long, which advertise the advantages of becoming a premium member on the Atresplayer platform, or present new channels like Mega. This is more promotional or corporate communication content which does not create any interaction or conversation with the public. The videos included on most of the subchannels are short (barely over four minutes) and do not show complete shows from their linear programming. Their use corresponds to a promotional strategy to attract the public towards the other two main viewer windows: linear television and the website. There is a certain inclination towards virality with narrative characteristics pressing for popularity and reticular reproducibility (Sádaba and Rendueles, 2016).

Table 2. List of Atresmedia group channels

| Channel                   | Description | Linear TV | Subscribers | Views         | Videos |
|---------------------------|-------------|-----------|-------------|---------------|--------|
| Atresmedia                | Group       | –         | N/A         | 178,565       | 30     |
| Flooxer                   | Website     | No        | 32.9 K      | 9,838,057     | 154    |
| Atrestube                 | Website     | Yes       | N/A         | 766,634       | 46     |
| Fundación Atresmedia      | Others      | No        | 1.1 K       | 134,178       | 147    |
| Ponle freno               | Others      | No        | N/A         | 913,261       | 177    |
| Antena 3                  | TV channel  | Yes       | 5.17 M      | 5,241,916,985 | 20,392 |
| La Sexta                  | TV channel  | Yes       | 1.47 M      | 1,650,516,009 | 14,348 |
| La Voz Antena 3           | TV program  | Yes       | 364 K       | 225,995,756   | 1,090  |
| Objetivo TV               | Others      | No        | 7.76 K      | 4,690,202     | 355    |
| Telenovelas               | TV programs | Yes       | 1.11 M      | 921,632,727   | 13,350 |
| Top Trending Vídeo        | Website     | No        | 592 K       | 435,600,320   | 1,785  |
| Top Style                 | Website     | No        | 31.3 K      | 3,309,153     | 321    |
| Hypno                     | Website     | No        | 46.6 K      | 6,186,788     | 98     |
| Atresmedia Cine           | Website     | No        | N/A         | 1,850,024     | 366    |
| Fun up!                   | Website     | No        | 81.2 K      | 10,949,334    | 261    |
| La Sexta Noticias         | TV program  | Yes       | 232 K       | 154,193,643   | 14,316 |
| El chiringuito de jugones | TV program  | Yes       | 1.1 M       | 664,669,239   | 5,683  |
| Antena 3 Noticias         | TV program  | Yes       | 95.4 K      | 63,356,513    | 6,322  |
| Videoencuentros           | Website     | No        | 20.9 K      | 9,619,627     | 269    |

Compiled by the authors. Data from 7 December, 2019.

The Mediaset strategy on YouTube evidently intends to strengthen the group brand and not the individual channels as none of its linear channels has its own account on YouTube (Table 3). Its internal structure responds to formats such as Mediaset Reality (but not some of the most watched linear shows like *Gran hermano* or *Supervivientes*), Mediaset Gossip (but not *Sálvame*), or Mediaset Ficción (but not the series on the channels). On the other hand, it also incorporates the platform Mtmad, intended for a younger public, together with other channels like *Nius* or *Uppers*.

Table 3. List of Mediaset group channels

| Channel                 | Description | Linear TV | Subscribers | Views       | Videos  |
|-------------------------|-------------|-----------|-------------|-------------|---------|
| Mediaset                | Group       | –         | 891 K       | 507,035,735 | 1,826   |
| Mediaset Reality        | TV programs | Yes       | 112 K       | 68,365,546  | 348     |
| Mediaset Gossip         | TV programs | Yes       | 7.72 K      | 4,166,371   | 95      |
| Mediaset Ficción        | TV programs | Yes       | 17.3 K      | 7,142,939   | 49      |
| Mtmad                   | Website     | No        | 423 K       | 178,818,988 | 3,271   |
| Nius                    | Website     | No        | 2.4 K       | 654,394     | 130     |
| Uppers                  | Website     | No        | 51          | 434         | 15      |
| 12 meses Mediaset       | Others      | No        | 2.4 K       | 94          | 672,809 |
| Mediaset Talent Network | Others      | No        | N/A         | N/A         | 0       |

Compiled by the authors. Data from 7 December, 2019.

Mediaset does not present any full show from linear television; in fact, most of its videos are no longer than one minute. This shows the publicity objective of most of these videos as the offer is made up of brief spots, noteworthy fragments, and some of its shows which may attract the public to other viewing windows belonging to the media company. As occurs with the Atresmedia group, the content of the videos is mainly designed to promote their virality.

### 3.2. Consumption

The analysis carried out between the months of February and May 2020 of the 19 chosen Spanish television YouTube channels returned a sample of 108,512 videos. In this four-month period, 5,963 new videos were published, generating 1,313.9 million views in total.

Of the videos published by the selected channels, 301 each received over half a million accumulated views – these made up the sample for analysis (Table 4) –altogether adding up to 453.9 million views. Thus, 0.3% of the videos make up 34.6% of the views, which fits in with the results of prior research (Bärtil, 2018; Arthurs et al., 2018), and underlines that only a few videos reach a significant audience, while most return residual data.

Table 4. Videos published by the TV channels on YouTube and accumulated views (February-May 2020) by category

| Category           | Videos |       | Visualizations |       | Mean visualizations per video |
|--------------------|--------|-------|----------------|-------|-------------------------------|
| films              | 2      | 0.7%  | 6,360,837      | 1.4%  | 3,180,419                     |
| debates            | 1      | 0.3%  | 998,615        | 0.2%  | 998,615                       |
| docu-reality shows | 26     | 8.6%  | 25,631,716     | 5.6%  | 985,835                       |
| sports information | 15     | 5.0%  | 10,783,948     | 2.4%  | 718,930                       |
| news               | 7      | 2.3%  | 7,719,116      | 1.7%  | 1,102,731                     |
| comedy shows       | 14     | 4.7%  | 10,698,671     | 2.4%  | 764,191                       |
| special programs   | 4      | 1.3%  | 4,806,555      | 1.1%  | 1,201,639                     |
| music programs     | 1      | 0.3%  | 643,251        | 0.1%  | 643,251                       |
| reality shows      | 8      | 2.7%  | 23,977,578     | 5.3%  | 2,997,197                     |
| series             | 60     | 19.9% | 206,550,325    | 45.5% | 3,442,505                     |
| talent shows       | 136    | 45.2% | 134,529,264    | 29.6% | 989,186                       |
| talk shows         | 27     | 9.0%  | 21,206,018     | 4.7%  | 785,408                       |

Compiled by the authors.

The television content published by the channels on YouTube mostly belongs to two categories: talent shows (45.2%) and series (19.9%); these also generate the greatest number of viewers. However, if we consider the mean visualizations by published video, we find that the most successful categories for the audience are: series (3.4 million), film (3.2 million), and reality shows (3.0 million). The case of the series and film is particularly interesting due to the management of rights on YouTube. In this case, 100% of the series are Spanish productions, as are the movies – *Si fueras tú* and *Cupido*, derived from the web series of Playz, the digital platform for a young audience. On analyzing the content of the 10 most-viewed videos (between 5.1 and 30.3 million visualizations), we find that nine are series and one is a reality show, but they all have similar romantic/sensual storylines.

The conception of YouTube as a video repository for the channels leads us to assess the influence of longevity on the viewing of the videos. We conclude that this factor does not have a significant effect among the most watched videos. Their success is due to the content remaining interesting, attractive and convenient: for example, fragments of series that do not go out of fashion, comedy content or memorable performances on talent shows. Only the news bulletins show a loss of value over the years relative to the current visualizations, while the docu-reality category prompts greater consumption when the publication is recent and up-to-date.

One of the defining characteristics of YouTube content is its brevity, an aspect motivated by the promotional use of the platform by the television channels. In the sample analyzed, the mean length of the videos is 10 minutes and 20 seconds, a figure affected by 17 recorded items being over an hour in length (special programs, sports competitions or live streaming content of talent shows such as *Operación Triunfo* on YouTube). If we dismiss these exceptionally long videos, the mean length drops to 4 minutes 29 seconds, which is representative of standard content on YouTube. Regarding the analysis by category, the shortest videos are found in reality shows (2'), series (3' 59'') and talk shows (4' 32''), where outstanding moments are posted and may correspond with promotional ends and getting the public hooked.

With reference to the media groups, during the months studied, Atresmedia was the leader in the number of visits according to Comscore, although the *Operación Triunfo* and *Masterchef* channels also had a high number of visits. These statistics contrast with the consolidated leadership of the Mediaset group on linear television.

Finally, the use of YouTube as a platform for expansion and for new content created on the basis of the main products has not been greatly adopted by the television channels and does not have important results. The analysis carried out on the most viewed videos shows that only 5.6% of the videos are exclusive – created especially for the digital platform and not available through their main windows. Among the remaining videos, 10% are complete telecasts and the others are fragments (61.5%) and performances (22.9%). It is evident that the selected extracts of broadcasts from linear television is the content which has the greatest number of visualizations for these channels on YouTube.

### *User profile*

The user who consumes content from the TV channels in Spain is an adult:<sup>5</sup> 64.0% of the consumers are over 35 years old.<sup>6</sup> However, it is young people who consume the most content. Regarding the minutes of video consumed per user, the young audience aged between 18 and 34 consumes over 60 minutes per month and, as age increases, the time spent is greatly reduced (Table 5).

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<sup>5</sup> Data corresponding to February-May 2020, using the Videometrix tool of Comscore.

<sup>6</sup> On YouTube, 8 out of 10 people between the ages of 18 and 49 consume video on a monthly basis. Source: <https://www.thinkwithgoogle.com/consumer-insights/video-trends-where-audience-watching/>

Table 5. User profile of open-access TV on YouTube.

|                | Viewers    |        | Minutes per viewer<br>(monthly) |
|----------------|------------|--------|---------------------------------|
| Total Audience | 63,435,621 | 100.0% | 46.3                            |
| <b>Age</b>     |            |        |                                 |
| 18-24          | 9,599,712  | 15.5%  | 64.7                            |
| 25-34          | 11,872,394 | 19.1%  | 62.7                            |
| 35-44          | 13,567,432 | 21.9%  | 51.6                            |
| 45-54          | 13,221,764 | 21.3%  | 35.6                            |
| 55+            | 13,818,417 | 22.3%  | 23.5                            |
| <b>Gender</b>  |            |        |                                 |
| Female         | 32,317,202 | 51.0%  | 47.9                            |
| Male           | 31,117,415 | 49.0%  | 44.6                            |

Compiled by the authors, based on Comscore (data from February-May 2020).

There are no relevant differences by gender: men make up 49.1% and women 50.9% of viewers. There is a slight difference with greater consumption in the 18 to 34-year-old group of women (18.1%) compared to men (15.8%).

Apropos the access device, during the period analyzed, 84.3% of the visualizations occurred on mobile platforms, of which 82.3% correspond to smartphones.

The average user consumed between eight and 12 videos per month, spending between 39 and 55 minutes on the consumption of Spanish television channel content on YouTube. Desktop consumption implies more time dedicated to consuming videos (an average of 21 minutes more per user) and, within mobile consumption, the use of tablets, although only representing 17.7%, means that each user on average sees more videos and for a longer time.

#### 4. Discussion and conclusions

The analysis of the offer and consumption on YouTube of Spanish open-access television channels suggests that there is neither one single strategy nor that the linear television model functions in this scenario.

The study indicates that there is no correlation between what the traditional TV channels offer and what they present on the YouTube platform. There is no systematic transposition of the channels' offer and programming in Spain, nor is this the case in other European countries, such as the United Kingdom, France, Italy and Germany. The Spanish public corporation opts for a greater presence of the RTVE brand, a channel which includes content of different types – programs, clips, subchannels, etc. – modelling themselves as an online repository; in contrast, Atresmedia gives importance to the brand of its linear and online channels, while Mediaset has a token presence (like Mediaset Italia and RAI), in both cases with a corporate promotional objective inviting the user to visit other content windows. Thus, YouTube is part of the 2.0 cooperative communication strategy of these broadcasters to direct their users towards their websites, where viewing is by subscription only – similar to Germany's RTL, which

publishes clips linked to the pay-platform TVNOW. Thus, given the type of offer (content, length, etc.) in the case of the private channels, YouTube promotes movement towards their own digital spaces in a more obvious way than in the case of RTVE – close to the BBC model where there is also a common channel for the offer and not per TV channel, as with the British ITV and Channel 4 or the German ZDF – whose website does not require prior payment or registration. However, the strategy is constantly changing with new incorporations and restructuring. In fact, on RTVE we saw the creation of the thematic news channel 24H in March 2020 and more live broadcasts, strengthening its public service mission in the context of the worldwide health crisis.

Above all, each group has a common objective: to create communities for their channels or their content. In this sense, YouTube is an additional point of contact, which is particularly suitable for reaching the young public and to achieve visibility and circulation for their content, including a second or third life after the linear broadcast and an archive on the corporate website. Television channels aim to be where their audience is, where their public produces and shares content, outside the television set and without the restrictions of programming. A paradigmatic case is RTVE's talent show *Operación Triunfo*, with live broadcasts and much content being constantly published, which, with the support of its fandom, is an example of the success of television moving to YouTube. Far from the intensive use of this program, other talent and reality shows also have a strategic window on YouTube across Europe: *Britain's Got Talent*, *Deutschland sucht den Superstar*, *Il collegio* or *The Voice: la plus belle voix*.

In terms of the audience data, YouTube results also differ from those of linear television. With the latter, Mediaset is the leader in Spain, while on YouTube the main broadcaster is Atresmedia, far ahead of the Mediaset and RTVE channels. As has been seen in other research on YouTube (Arthurs et al., 2018; Bärtl, 2018; Bentley et al., 2019), only a few videos reach a high level of views while most of the content barely makes an impact. In the case of the open-access TV channels in Spain, 301 videos generated over half a million plays, which means that 0.3% of the videos published accumulated 34.6% of visualizations.

Regarding the content that the media groups show on YouTube, most of the videos are very short and match the nature of the platform: short videos for strengthening potential virality. The idea is that the user will be hooked by an outstanding fragment and will share this TV moment, thus participating in the channel's promotion strategy (extended life content). In this way, YouTube acts like a sounding board and attracts viewing traffic to its website, even including new targets (Vignaroli et al., 2016).

In this sense, the conception of YouTube as an online repository and a fresh opportunity for content has built over time by increasing the archive material on the channels. The longevity factor of the videos does not necessarily influence the volume of visualizations. The most viewed old content – fragments of series or memorable performances – continue to attract interest and are marked by the snowball effect which has previously been attributed to YouTube: the most viewed content tends to increase their visualizations over their lifetime (Bärtl, 2018).

Other factors analyzed show that what is most watched in open-access Spanish television on Youtube is fragments of series, films and the most outstanding moments of reality shows. This fact differs from the most watched on other European television channels, leaving room for curious videos, cookery programs and talk shows, and less fiction. However, the content published is not usually exclusive, nor do the channels give space to extra material which would promote audience loyalty on YouTube as an extension of linear television. Only for *Operación Triunfo* is there a use which shows a consolidated strategy for connection with the program's community through YouTube. In contrast, European broadcasters such as Channel 4, ZDF or BBC present some digital-only content – in May 2021 the latter launched *The Empty Seats Tour* only on YouTube.

Finally, the user profile for open-access Spanish television on YouTube shows two interesting facts: firstly, an 18 to 34-year-old young adult public bracket, who are those who spend most time on the platform; and secondly, that 84.3% of consumption occurs on mobile devices, with tablets contributing to a much greater consumption of videos for a longer time.

Therefore, the role of YouTube is confirmed as a touchpoint for traditional broadcasters' TV content. However, for different legal and business reasons, it is merely used by the private channels as a hook and attractive element to promote certain content stored on their own websites. They do not take advantage of the potential of YouTube and do not consider it to be a key element in their digital strategy; in practice, there is a lack of crossmedia initiative which could improve the user experience in view of an absence of exclusive material. There is thus no extended content strategy. Although YouTube is not considered a perfect competitor for premium VoD and TV platforms, it exerts a competitive pressure that is likely to increase (Lindstädt-Dreusicke and Budzinski, 2020) and, therefore, the search for a strategy will be key.

This research may be a basis for future comparative work on the role of YouTube in other media systems in Europe, and to define what type of content triumphs in TV viewing on other external platforms. Likewise, it would be interesting to undertake qualitative-type research on the expectations of YouTube users for these channels, to discover if they wish to see content which they have not been able to watch on television or, on the contrary, whether they want exclusive content. In conclusion, further research to advance the study of the behavior of new audiences regarding new television is recommended.

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