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Millennials' abandonment of linear television

Enrique Guerrero [CV] [ORCID] [GS] Full Professor. Universidad de Navarra (Spain) - eguerrero@unav.es

Abstract

Introduction. Television is undergoing a historical transformation due to its convergence with the Internet and the disruptiveness of technological innovation. **Methods.** This article analyses the evolution of linear television consumption by the so-called millennial generation, in comparison to the general audience, and how it is affected by online viewing. This research also addresses millennials' audience profile and affinity in relation to the main commercial television channels in Spain. To this end, quantitative and qualitative instruments are used: Kantar Media viewership data and an original online survey about audiovisual consumption habits applied to a representative sample of Spanish Internet users and, on the other hand, semi-structured interviews with the digital strategists of the major private television companies and a multichannel network. **Results and conclusions.** The results confirm the leak of young audiences –and the associated revenues– and their move towards more personalised and interactive audiovisual entertainment services. In response to this, television operators are implementing new multi-platform strategies that affect their core business and even their own identity.

Keywords

Television; Internet; audiences, audiovisual media consumption; millennials.

Contents

Translation by **CA Martínez-Arcos**
(PhD in Communication, University of London)

1. Introduction

Technological innovation has always had a strong impact in the audiovisual entertainment industry, in terms of script -transmedia narrative- (Scolari, 2013), production (Francés, 2015), distribution, marketing (Doyle, 2016) and consumption. For example, digital convergence has led to the fusion of three previously-independent major industries: audiovisual media, information technology and telecommunications (López Villanueva, 2011). In particular, the fusion of television and the Internet has resulted in a new model of online and interactive television that allows for customised consumption through a wide variety of screens (Diego, Guerrero and Etayo, 2014). Connected viewing involves a global multi-platform entertainment experience derived of the convergence of digital technology, social networks and mainstream media (Holt and Samson, 2014).

Television is undergoing a historical transformation characterised by: a) a very significant increase in the supply of content; b) access to content through multiple connected devices (fixed and mobile); and c) the emergence of disruptive content consumption habits that enhance customisation and interactivity. Social television is an irrefutable proof of this (Galician, 2013) as its viewing becomes a shared experience through social networks and the phenomenon of the second screen becomes generalised, revitalising live broadcasting as an essential ingredient of the medium and the concept of television event (Guerrero, 2015), which is also compatible with the rise of on-demand content consumption.

Some authors refer to this new phase of television, which revolves around a mixed online and offline model, as the post-broadcasting era (Tse, 2016). Others even question whether we should continue calling it “television” (Uribe-Jongbloed, 2016), given that the metamorphosis derived of its fusion with the Internet is of such depth that it seems reasonable to consider it as a new medium.

However, this change cannot be understood in all its complexity if we overlook the social context in which it is inserted: a convergent and participatory culture in which the media share the limelight with active audiences (Jenkins, 2006a, 2006b). In this context, the role played by the younger sectors of the population stands out as they are pioneers in the use of new technologies and the consolidation of new forms of audiovisual consumption (González and López, 2011). These changes involve the conversion of the classic viewer into a content developer and producer, i.e. simultaneously a consumer and creator (crossumer) (Romero and Gil, 2008).

In this regard, a particularly outstanding role has been played by millennials, also known as digital natives, the Net generation -in allusion to the impact of the internet and digital technology in their personal development- (Tapscott, 2009), the “Me” generation --for their self-centred view-- (Torrado, Ródenas and Ferreras, 2011), and the generation C --in allusion to the relevant concepts for this audience that begin with the letter “C”, such as content and creativity-- (Hardey, 2011).

Traditionally, the generation-based segmentation of the population has followed a classification pattern based on age (Ferguson and Green, 2016) and shared experiences. However, on this occasion, belonging to this generation is not determined by age --see for example the case of those generations named with the letters X and Y--, as much as it is determined by growing up in a world built around digital technologies (Hardey, 2011). For this reason, the exact ages that comprise the millennial generation change from author to author, although there is some consensus that this segment of the audience is composed by people born from the beginning of the 1980s to the mid or late 1990s -some sources even include people born in the late 1970s (New Strategies Editors, 2012). It is clear, therefore, that this generation is composed by a diverse, heterogeneous population group (Álvarez Monzoncillo and López Villanueva, 2017). Hardey (2011) highlights three distinctive aspects of this population group:

a) Connection to digital media from anywhere.

b) The link between user-generated content and social networks.

c) Belief that the experiences, opinions and recommendations of others are the best guarantee when making purchasing decisions.

In addition, millennials represent a target whose audiovisual preferences extend far beyond the supply of professionally generated content. Due to this reason, television operators have seen how this audience group has been seduced by the offer of platforms dominated by amateur or semi-professional content. The power of online services such as YouTube has contributed to the emergence of a new producer profile: the Youtuber. Increasingly more professionalised (Elorriaga and Monge, 2018), the YouTuber stands out as a genuine claim for young audiences and for commercial brands interested in this target, which is elusive and no longer interested in conventional television channels. These circumstances have forced traditional operators to reinvent themselves to adapt to a more competitive environment, and to adopt new strategic policies for content production and dissemination, which has even had an impact on their identity as media and companies.

This article examines the evolution of television consumption by millennial audiences in comparison to the general audience, to analyse the audience profile and affinity of the major TV channels and determine how those viewing habits affect the strategic decisions made by audiovisual companies.

2. Methods

The method used to address the aforementioned object of study combines quantitative and qualitative tools. In addition, we have reviewed the literature on the impact of technological innovation on media consumption habits, the emergence of new actors in the audiovisual industry and market, and the millennial audience profile.

Regarding the quantitative sources, first of all, we analysed the TV viewership data of Kantar Media in Spain with the computer program *Instar Analytics*. In particular, we compared the viewing habits of the total population (people over 4 years of age) against the habits of the millennial target (we chose the broadest age range based on the aforementioned parameters, selecting the population born 1980 to 2000). In addition, the analysis focuses on the main private TV companies, Atresmedia and Mediaset, and specifically on their channels that were active from 2013 to 2017.

Secondly, the study includes some results of a purpose-created online survey questionnaire applied in December 2016 to the population of Spanish internet users as part of a broader research project about audiovisual consumption habits. The analysis is based on the definition of “Internet user” proposed by the Spanish Association for Media Research (AIMC): people between 14 and 65 years of age who have used the Internet at least once during the last month. However, for this study we only took into account the answers of respondents aged 18 to 35, who fit into the millennial category. This way, the final sample consists of 518 respondents, representative of the population of reference, with proportional preset age, sex and region quotas. The sampling error is estimated at 3.1% -with maximum-likelihood variance- and a 95% confidence level, resulting in a high response rate of the questionnaire (59.8%).

This quantitative data has been complemented, from a qualitative perspective, with data provided by the semi-structured interviews with the digital strategists of the major private television operators in Spain (Mediaset and Atresmedia), and the Director of operations of one of the main multichannel networks (MCN) with Spanish-language content: 2btube.

Thus, this article approaches its object of study with a combination of quantitative and qualitative methods and taking into account all the actors involved: users, professionals and academic experts.

3. Results

3.1. Evolution of linear TV consumption

In 2012, television viewership broke the previous record thanks to the increase in the offer of TV channels, the economic crisis and the celebration of major sporting events in Spain, among other factors. On average, in 2012, each person watched 246 minutes of television per day according to Kantar Media. Until then, the increase in online audiovisual viewing did not seem to subtract minutes from conventional television, and suggested a complementarity of screens (Guerrero, 2015). However, the tipping point occurred in 2013, when linear television consumption started to drop in a progressive and widespread way, especially among younger audiences. In just five years, television daily viewing dropped 21 minutes on average per person, reaching 225 minutes in 2017 (table 1), excluding delayed viewing and guest viewing figures, in order to make it comparable with the same data for the years analysed here. In contrast, in the previous five-year period, from 2007 to 2012, that same figure grew up 23 minutes, going from 223 minutes in 2008 to the aforementioned record in 2012.

This decline in the consumption of traditional television with the popularisation of the catch-up TV online players of the main TV operators and their corresponding mobile app: RTVE's *RTVE a la carta*, Atresmedia's Atresplayer and Mediaset's Mitele. Between 2011 and 2013 these players strengthened their online and multi-platform offer, in a period in which viewership-measurement only took into account linear consumption in the traditional TV set, because it was not until 2015 when Kantar Media started to include delayed viewing figures, although in a very limited way, since it only considered viewing in smart TV sets and not the rest of the screens (like mobile phones and tablets).

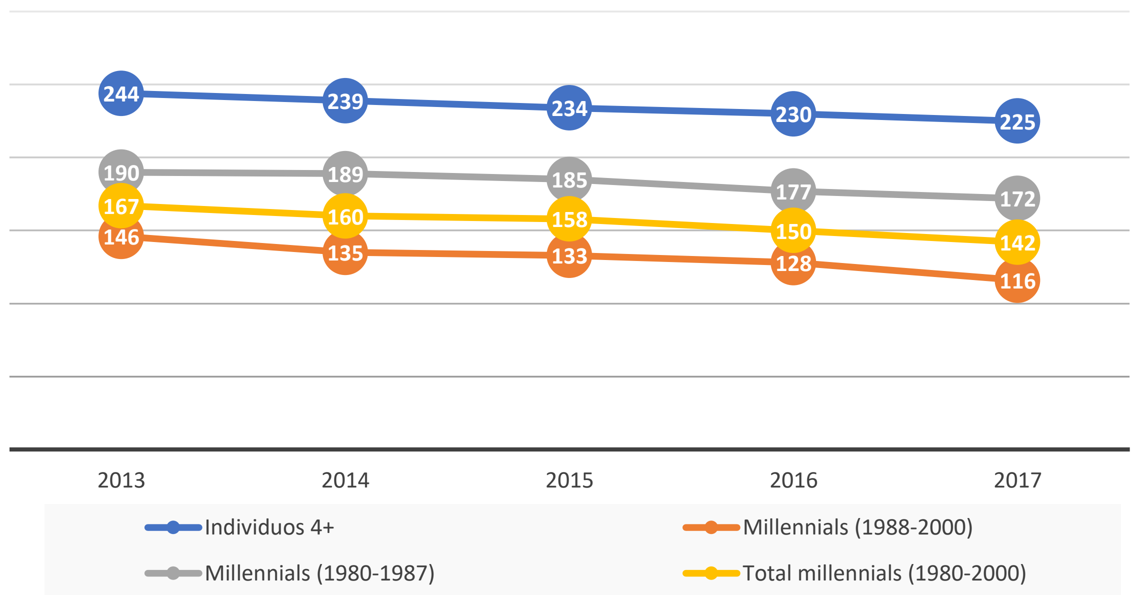
On the other hand, in 2014, pay television channels proliferated in Spain due to the inclusion of this service in the bundled service packages of mobile phones, fixed telephone lines and internet of telecommunications companies. For example, in March of that year, Movistar Fusion TV was launched and in 2015 this service was reinforced with the acquisition of Canal+, resulting in the emergence of Movistar+. This action was later replicated by major competitors such as Vodafone and Orange. Largely, the attractiveness of such combined offers was not only access to a list of conventional television channels, but the associated added-value services, such as connected multi-device platforms, which in addition to the television content offered an expanded catalogue of on-demand video. With this move, television operators --both free and pay-- launched services which, in a sense, competed with linear TV channels at a time in which, as mentioned, a large part of viewers were not yet considered by in viewership measurement.

In addition, in 2015, Spain experienced the arrival of the new subscription-based on-demand video platforms (S-VOD or OTT [*Over-The-Top Television*]), like Netflix. In 2016 these platforms were joined by HBO Spain and Amazon Prime Video, and in 2017 by Sky. These services must be added to the ones that already existed in the market, such as Filmin and Rakuten TV (formerly Wuaki TV), and the presence of popular online video sharing platforms like YouTube. Therefore, the Spanish market went, in just a few years, from a state of scarcity to a situation of audiovisual excess.

These on-demand viewing platforms stand out as a very attractive option for the connected generation, since they allow users to be protagonists in their own audiovisual diet in a multi-screen context: they decide what, how, where and when to watch the contents. However, while windows to access content multiply, it is complicated to capture audience's attention due to the multitasking nature of this public. Millennials attention in front of the screen is becoming increasingly more fragmented and, in turn, more intermittent, since it is shared with other devices. Some studies suggest that more than 60% of those who consume online content simultaneously use a second screen in a regular basis (Guerrero, Diego and Kimber, 2017). For example, for the digital natives, it is normal to watch television while talking on social networks and messaging apps, like WhatsApp, or using these services in relation to the contents they watch (Guerrero, Diego and Kimber, 2017). The sole purpose is to satisfy the need to feel always connected (Dias and Teixeira Botelho, 2016).

Below, we will focus on how traditional television viewing time has evolved, comparing the general population and the millennial target. From 2013 onwards, as shown in Figure 1, television consumption decreases in a continuous and steady way, without sharp declines, across all analysed audience sectors.

Figure 1. Evolution of average consumption (in minutes) of linear TV (Maud)



Source: Authors' own creation with data of Kantar Media.
Note: Excludes delayed viewing figures and guest viewing figures.

The top line shows the viewing time evolution of the total population (individuals over 4 years), while the lower lines reflect the consumption of millennials, as a whole (born 1980 to 2000) and in two sub-groups: born 1980 to 1987 (aged 30-37 in the last year of the study) and 1988 to 2000 (aged 17-29 in 2017). Table 1 contains the same information but with specific figures broken down year by year during the 2013-2017 period.

Table 1. Evolution of the average daily consumption (in minutes) of linear TV (Maud)

2013	
Individuals 4+	244
13 to 25 years	146
26 to 33 years	190
13 to 33 years	**167**
2014	
Individuals 4+	239
14 to 26 years	135
27 to 34 years	189
14 to 34 years	**160**
2015	
Individuals 4+	234
15 to 27 years	133
28 to 35 years	185
15 to 35 years	**158**
2016	
Individuals 4+	230
16 to 28 years	128
29 to 36 years	177
16 to 36 years	**150**
2017	
Individuals 4+	225
17 to 29 years	116
30 to 37 years	172
17 to 37 years	**142**

Source: Authors' own creation with data of Kantar Media.

Note: Since 2015, Kantar Media considered delayed viewing in smart TV, which is 3 minutes a day in 2015 and 2016, and 4 minutes in 2017. In addition, this last year, Kantar Media also added guests viewing data in households with audiometer, which reached 11 minutes a day. However, this table only accounts for linear consumption and without guests to show the evolution of the same data annually.

As shown in figure 1 and table 1, young audiences' consumption is significantly lower than that of the general population over time. However, this decline is just a little more pronounced than that of the general audience, since both groups reduced their TV viewing time in a similar way (lines drop in parallel mode), with the exception of the last year, in which this trend accelerates. While in 2013 the youngest sector of millennials consumed 98 minutes less per day than the average individual, in 2017 this difference increased to 109 minutes, which is a considerable figure. In general, the younger the target, the shorter its viewing time of linear television.

In the period under studied, there was no indication of a possible "boomerang effect", i.e., it does not seem that the changes in viewing habits are a momentary issue caused by the young age of the audience, so that when that target grows old, it will go back to consuming more conventional television. Instead, consumption pattern remains the same over time, and the younger the audience, the shorter the time dedicated to linear television. Thus, it cannot be concluded at this moment that the change in audiovisual consumption patter will revert. In this sense, if the trend continues, it is to be expected that the older sectors of the audience, in the near future, will consume television content very differently to the way older people do today.

Table 2 shows that the viewing of online audiovisual has a direct impact on the time spent on conventional television, especially in the case of the millennials. More than 63% of the population who watches content on the Internet acknowledges that they spend less time watching television. This figure soars above 73% in the case of millennials. In addition, we must bear in mind that, according to this same study, almost all users under the age of 25 (97.5%) admit watching online content, and that this figure remains above 90% (92.6%) if we consider the population under 35 years, while the average of the population stands around 80% (Guerrero, Diego and Kimber, 2017).

Table 2. Does online viewing affects consumption of linear TV? (2016)

	Millennials	viewers 4+
Yes, I consume more hours of traditional TV	5.9%	5.5%
Yes, I consume less hours of traditional TV	73.4%	63.4%
No, I consume the same hours of traditional TV	20.7%	31.1%
Total	100%	100%

Source: Authors' own creation.

Authors like Jiyoung (2013) have also confirmed this transfer of audience from traditional TV to connected screens and online audiovisual services. In this sense, the competition for the audience is not only against professionally generated content available on online catch-up TV platforms by also against videos generated by users, as a high percentage of millennials views this type of content on the internet on a regular basis, reaching 90% in the 18-25 age group (table 3).

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Table 3. Age range of millennials who watch videos on YouTube or similar platforms (2016)

18 to 25	88%
26 to 30	79%
31 to 35	72%

Pearson's chi-squared (2) =14.69 p=0.001.
Source: Authors' own creation.

However, although the trend is downward, linear television consumption is still at high levels (figure 1 and table 1): almost four hours in average per day per person for the total population. This time drops to nearly two and a half hours for the millennial target. As a result, television is still one of the main media to bring content to large audiences despite the complex situation it faces. However, not all linear channels have the same audience profile.

3.2. TV channels' audience profile and affinity

Television networks are multichannel and multimedia companies. Since 2005, with the relaunch of Digital Terrestrial Television (DTT) in Spain and the granting of new licenses, the main private television operators went from having one channels to having multiple channels. From the perspective of programming, this had important consequences, not only in terms of the increased supply, but also because, in a sense, the channels of a same group competed with each other. To minimise this risk and provide complementary programming, operators chose to segment their offer, directing each channel to a number of different targets. As a result, the audience profile of each channel varies depending on variables such as sex and age. Table 4 shows the evolution of the audience profile of the channels of the main audiovisual media groups in Spain, Mediaset and Atresmedia, which were active during the whole analysed period (2013-2017). Therefore, we exclusively take into account age as a demographic variable and considered two targets of reference (millennials born 1980 to 2000) and rest of the population.

The comparison of the audience profiles of the TV channels of both groups indicates that the networks that have a greater percentage of millennials in their audience are Neox –Atresmedia-- and *Factoría de Ficción* (FDF) --Mediaset. In contrast, Atresmedia' La Sexta and Antena 3 and Mediaset's Telecinco and Energy have the lowest share of millennials in their audience during the greater part of the period studied. Mediaset's Energy experienced a very marked drop of millennial viewers in the past two years, driven mainly by changes in programming. The comparison of the channels of both groups indicates that the millennial audience of Mediaset is slightly larger than that of Atresmedia.

This conclusion, drawn from audience profiles, is confirmed by the affinity index, which is commonly used in television viewership measurement to analyse the degree of proximity between a channel or programme and a certain type of audience in terms of viewing interests and preferences. According to Kantar Media, affinity is calculated by dividing the rating of the selected target --in this case millennials-- by the rating of the total audience and then multiplying the result by 100. If the result is 100 or higher, the target is considered related. This way, the higher the result, the more compatible the selected public is; and the lower the resulting number (less than 100), the lower the affinity between the selected sector of the audience and the analysed channel or programme.

Table 4. Evolution of the audience profile (age) of Mediaset and Atresmedia TV channels

2013	**Mediaset**							**Atresmedia**				
	Telecinco	Cuatro	Boing	Divinity	Energy	FDF	**Group**	Antena 3	La Sexta	Neox	Nova	**Group**
13-33 years	14.6	21.4	18.1	25.5	26.9	32.7	**19.6**	16	14.2	42.6	23.2	**18.7**
Rest	85.4	78.6	81.9	74.5	73.1	67.3	**80.4**	84	85.8	57.4	76.8	**81.3**
2014	**Mediaset**							**Atresmedia**				
	Telecinco	Cuatro	Boing	Divinity	Energy	FDF	**Group**	Antena 3	La Sexta	Neox	Nova	**Group**
14-34 years	15.5	21.2	17.9	21.2	25	32.1	**19.7**	15.9	15	40	20.4	**18.5**
Rest	84.5	78.9	82.1	78.8	75	67.9	**80.3**	84.1	85	60	79.6	**81.5**
2015	**Mediaset**							**Atresmedia**				
	Telecinco	Cuatro	Boing	Divinity	Energy	FDF	**Group**	Antena 3	La Sexta	Neox	Nova	**Group**
15-35 years	16.8	19.4	18	20.3	22.7	31.3	**19.7**	15.9	15.4	37.3	19.9	**18.3**
Rest	83.2	80.6	82	79.7	77.3	68.7	**80.3**	84.1	84.6	62.7	80.1	**81.7**
2016	**Mediaset**							**Atresmedia**				
	Telecinco	Cuatro	Boing	Divinity	Energy	FDF	**Group**	Antena 3	La Sexta	Neox	Nova	**Group**
16-36 years	16.9	18.8	14.6	18.2	12.7	29.2	**18.4**	14.8	15	38.7	18.9	**17.7**
Rest	83.1	81.2	85.4	81.8	87.3	70.8	**81.6**	85.2	85	61.3	81.1	**82.3**
2017	**Mediaset**							**Atresmedia**				
	Telecinco	Cuatro	Boing	Divinity	Energy	FDF	**Group**	Antena 3	La Sexta	Neox	Nova	**Group**
17-37 years	15.2	19.2	15.4	18.5	12.9	29.2	**17.7**	14.4	14.1	36.4	18	**17**
Rest	84.8	80.8	84.6	81.5	87.1	70.8	**82.3**	85.6	85.9	63.6	82	**83**

Source: Authors' own creation with data of Kantar Media.

Note: Table only includes channels that were active throughout the period of study. Therefore, we excluded B Mad of Mediaset, and Atreseries and Mega of Atresmedia.

We estimated the affinity of the target audience (millennials), as a whole and across the two age groups -the ones shown in table 1- with Atresmedia and Mediaset channels, with the highest and lowest percentages of this type of public in their profile (table 4), during the analysed period (2013-2017). Table 5 reflects the degree of affinity with Telecinco, La Sexta, Neox and FDF.

These data reveal the low affinity index of millennials with Telecinco and La Sexta and the high index with Neox and FDF. This is especially true among the youngest sub-group of this sector, although its affinity with respect to these last channels also decreased from the first to the last year of the study.

It can be concluded, therefore, that part of the offer of linear television of the main operators in Spain is of interest for millennials. Their acceptable level of television consumption -just under two hours and a half a day- and their affinity with certain channels show that they still find in conventional television their own stronghold. However, the data collected also highlight the transfer of audiences from traditional television to other connected screens and the flight of younger audiences, who have modified their viewing habits and find more attractive offers online. Faced with this situation, how have television operators reacted?

Table 5. Evolution of millennials' affinity with Mediaset and Atresmedia channels with the highest and lowest shares of millennial viewers

2013				
Age group	**Telecinco**	**La Sexta**	**Neox**	**FDF**
13 to 25	49.3	40.7	191.7	147.3
26 to 33	69.3	75.7	147	112
13 to 33	**58.7**	**57.1**	**170.8**	**130.8**
2014				
	Telecinco	**La Sexta**	**Neox**	**FDF**
14 to 26	52.4	39.1	163.4	140.9
27 to 34	72.5	83.2	155.2	113.5
14 to 34	**61.8**	**59.8**	**159.5**	**128.1**
2015				
	Telecinco	**La Sexta**	**Neox**	**FDF**
15 to 27	59.2	40.8	151.8	134.4
28 to 35	76	84.5	145.2	114.2
15 to 35	**67.1**	**61.5**	**148.7**	**124.8**
2016				
	Telecinco	**La Sexta**	**Neox**	**FDF**
16 to 28	61.50	42.2	157.4	121.5
29 to 36	74.4	80.1	151.2	110.2
16 to 36	**67.5**	**59.8**	**154.4**	**116.2**
2017				
	Telecinco	**La Sexta**	**Neox**	**FDF**
17 to 29	53	38.3	131	117.1
30 to 37	67.8	75.3	158.1	112.7
17 to 37	**59.9**	**55.6**	**143.6**	**115**

Source: Authors' own creation with data of Kantar Media.

3.3. The transformation of television operators

Technological innovation has led to the convergence of television and the Internet, forcing the main agents of the television sector to adapt to a new ecosystem of hyper and multi-screen, and to reposition themselves as reference brands in an audiovisual market with more competitors.

The relationship of the main channels and audiovisual content producers with some of them, like YouTube, has never been smooth, and has been plagued by numerous conflicts over copyright

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breaches (Kim, 2012). Although YouTube was launched as a platform to share user-generated videos, since its inception, its original creators and Google -after its purchase- tried to turn it into a platform for professionally generated content capable of competing with the major television companies (Kim, 2012). The main reason why YouTube started with amateur content is because it could allow it to grow rapidly its catalogue and audience. The goal was none other than to reach, at least, an audience similar to that of television channels to then sell the professional content produced by large producers (Vonderau, 216). However, the main suppliers of professionally produced videos have always maintained a restrictive policy in this regard, forcing YouTube to launch its own subscription-based premium service: Red (Cunningham, Craig and Silver, 2016).

YouTube has become another competitor for TV operators as its business model is based on advertising revenue, instead of standing out as a genuine alternative (Cunningham, Craig and Silver, 2016).

As YouTube aspired to develop a relevant catalogue of professionally generated content, television operators began a process of reverse *YouTubisation*, by imitating the strategies of Google's video platform (Kim, 2012). Aware of the abandonment of the young audience and aware that it consumes less traditional TV due to the increasing online audiovisual offer (table 2), and given the low profitability provided by the revenue share established by Google, which does not distinguish between professional and amateur content (Vonderau, 2016), television groups launched their own online platforms dedicated to content produced by *YouTubers*: Flooxer (2015) of Atresmedia and mtmad (2016) and Yasss (2017) of Mediaset. Thus, TV operators aspire to reach the young target who is no longer attracted by traditional television, and to capture part of the internet advertising investment. In a similar move, public operator Televisión Española (TVE) launched in 2017 Playz, its digital platform for transmedia and interactive content directed to young audiences, although this time the catalogue was made up entirely of professional content produced exclusively for the online medium.

Ana Bueno, Director of multimedia contents for Mediaset Spain, confirms that the content available in mtamd is produced especially for the Internet, and that its format is "shorter, faster and fresher", but always "good quality", unlike YouTube. She adds that it is especially aimed at the millennial generation and the so-called generation Z, but also to other publics, given that the change in viewing habits has already spread to other age groups.

Atresmedia's director of marketing and media audiences, Rubén Vara, defines Flooxer as "a platform for short premium video, very oriented to digital natives, millennials*"*. Unlike YouTube, which hosts all kinds of proposals, Atresmedia opts for "varied contents, that allow them to develop a brand and to associate Flooxer with a set of values based on the quality and respect for the audience, and to offer a safe environment to advertisers". Its first slogan, "Get used to the good stuff" emphasised this message. According to Vara, the main reasons why a television group launches a service like YouTube are the following:

1) The exponential increase in consumption of online video.

2) The birth of a new mode of audiovisual entertainment and of new creators of content on the internet.

3) The need to improve the profitability of the videos produced for the online medium, given the narrow margin offered by YouTube to its professional partners.

4) The growth of the viewing of audiovisual content in mobile devices.

Ultimately, according to Vara, Flooxer is a complementary platform for linear television and its catch-up TV service, Atresplayer, which unlike Flooxer, specialises in long-lasting television content. Therefore, they do not compete for content and audience. Thus, although during television's primetime time slot this type of product has high ratings, its preferential consumption takes place in "micro-moments", such as commuting or waiting times during the central hours of the day. In addition, this platform neither seeks a shift of audience from one medium to another.

In this context, a new agent emerges in the audiovisual industry: the multichannel networks (MCN), which are intermediary content aggregators that manage a wide range of YouTubers channels - targeting niche audience, and in exchange for a percentage of the revenue generated by advertising, offer content creators services of production, sales, data analysis, representation, talent management, marketing, public relations, and even training, in order to professionalise the figure of the YouTuber (Cunningham, Craig and Silver, 2016; Vonderau, 2016). Although MCN manage a minimal part of the content available on YouTube, given the professionalisation, this content is the most valuable and has the most subscribers, the more loyal public (Vonderau, 2016). As a result, YouTube, through initiatives such as YouTube Spaces, and conventional television operators have decided to also exercise this role of intermediation between content creators, brands and audience, producing a phenomenon of vertical integration.

Blanca Formáriz, Director of operations of one of the main MCN of Spanish-language content, 2btube, confirms that the origin of MCN is due to multiple factors, including:

1) The flight of young audiences from conventional television forces brands to look for alternative means to reach this target.

2) Content creators or YouTubers establish a very strong emotional bond with their followers, in such a way that the become great prescribers. This quality makes them a particularly relevant figure for advertisers.

3) The exponential increase in advertising investment in digital media.

In addition, Formáriz also confirms that the activity of MCN goes beyond establishing relations with YouTube and other online video-sharing platforms and includes reaching agreements with the major television groups. In this sense, the objective is, not so much as to transfer the audience, but to "build bridges" between the universes of conventional television and online audiovisual services, especially in the case of content aimed at the young population.

All of this indicates that the online audiovisual industry is at a crucial moment in which it is growing and maturing, while all participants try to assume the roles of other agents, in the search for their identity and feasibility. To refer to this context, some authors have coined the term "new ecology of screens" (Cunningham, Craig and Silver, 2016). Others highlight the bubble of the video (Vonderau, 2016), given the growing offer of online audiovisual content due to the arrival of on-demand video platforms such as Netflix, Amazon Prime Video, HBO and Sky, which compete with YouTube and conventional television operators. To this we must add the emergence in the audiovisual industry of other powerful technology companies like Apple and Facebook, which not only have a global portfolio of users, but also a hard-to-beat financial strength.

4. Conclusions

The audiovisual entertainment sector, and more specifically the television industry, is undergoing a historic and crucial moment for its future. The challenges posed by disruptive technological innovation and, above all, by the audiovisual habits of the younger audience sectors have led the transformation of the main agents involved in the audiovisual industry and market. It has been a while since television operators ceased to be single-channel media to become multifaceted multimedia audiovisual companies, which compete with all kinds of products related with entertainment.

The audiovisual habits of the younger segments of the population -millennials and younger generations- prioritise the always-connected customisable services, against rigid and closed options. They are attracted to those products that grant them an active role, not only as consumers, but also as programmers and producers, placing them at the core of the stories that interest them.

The abandonment of this audience profile of linear television, the popularisation of all kinds of connected devices that provide access to audiovisual content, anytime and anywhere, the birth of new and vigorous competitors, and the growth of the online advertising investment have forced television companies to rethink their strategies, offer and, even, their identity.

The data collected show a remarkable and constant drop in traditional television consumption -almost 20 minutes less viewing time per person per day during the period analysed-, which is especially pronounced in the case of the young audience --half an hour less in just five years--, opening up a generation gap. Millennials watch almost an hour and a half less of television a day than the average viewer. At the same time, more 90% consume online audiovisual content in a regular basis, and this percentage sores to almost 100% in viewers under 25. In addition, more than 70% of the target under analysis acknowledges that online viewing has a direct impact on linear TV consumption, which is considerably reduced.

The audience profiles and affinity index allow us to conclude that there are linear television channels that still attract the interest of this sector of the public, but the affinity of millennials with large commercial TV operators in Spain is quite low, according to Kantar Media. As a consequence, the heads of programming do not even give priority to this segment of the public in their conventional channels, which consciously increases the age of their audience through programming decisions.

Faced with this reality and given that there is no evidence to indicate that young audiences will change their audiovisual habits and will go back to linear television, TV operators have begun a strategic process of restructuring. They have expanded the core of their business to embrace all kinds of products and services related to audiovisual entertainment and the art of storytelling, programming each content in its proper window, and reaching every target on the correct screen and time, without making the transference of viewers from one device to another a priority. Television and the Internet have merged forever and produced a transmedia, interactive, always-connected, customisable audiovisual model with a wide offer and sponsored by a young public who is eager to gain protagonism.

The audiovisual entertainment business changes at a rapid pace and faces uncertain challenges. The incipient emergence in the sector of technological giants raises even more questions in a thriving, yet high-risk, industry and market.

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