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The transition from linear television to VOD in Italy

The impact on consumers and on the audiovisual industry

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CHAPTER 3

Abstract

The aim of this research is to analyse the transition from linear to non-linear television in Italy, studying in particular the consequences of this phenomenon for the consumer and the television market and, to a lesser extent, some of its effects on cinema. The dissertation will be divided into three chapters.

The first chapter will focus on the definition of TV schedule, the pivotal tool of any programmer, which determines what will be broadcasted and in which time slot. Furthermore, it will discuss the main changes, both in terms of TV schedule's structure and in the role of the viewer, that have taken place from the beginning of television history up to the early 2000s.

The second chapter will deal with on-demand platforms. The stages that led to the difficult diffusion of VOD will be examined, paying specific attention to the technical and commercial functioning of streaming portals. Lastly, the chapter dwells on characteristics inherited from linear television and the main objectives of the different types of platforms.

Finally, the third chapter will look at the impact of on-demand platforms on users and on the audiovisual sector as a whole, from three different perspectives: the economic results achieved, the new consumption habits and the digitalisation of the country. It will then briefly consider the negative effects of on-demand on cinema and, through MUBI's case study, the potential positive effects.

Introduction

Television is undoubtedly one of the most important inventions of all time. Since it was patented in 1885 by the German student Paul Gottlieb Nipkow, it has gradually grown in popularity to become a medium that, more than any other, has the power to shape the daily lives of millions of people and determine the rhythms of their lives. The importance of television in history is evident when we analyse the number of countries in which it has spread and the multiple purposes of its use, ranging from simple entertainment to information and political propaganda.

Although much has been written regarding the history of the small screen, the complexity that characterizes the medium entails an inevitably non-exhaustive interpretation according to the social and cultural context. According to a methodology that can now be considered consolidated, the state of the art offers national or even regional photographs. This is the path chosen by the present work, which opts to investigate closely within the Italian context[1]. In this very context, starting from the historical studies of Aldo Grasso, through the subsequent investigations conducted by the research group composed of Anna Sfardini and Massimo Scaglioni, and based on the most recent analyses by Luca Barra regarding the transition from the scheduled programming typical of monopoly television to non-linear television, the objective of the paper is to reflect, starting from case studies and direct field experience, on the evolution of the television medium and to reconstruct an updated overview of the Italian television market today regarding non-linear aspects. This will inevitably lead

[1] As regards the Italian context, it is worth recalling a number of studies carried out between the 1970s and the 1990s, which have been fundamental in reconstructing part of television's history and in understanding the medium's potential. Among the many, the writings of former RAI journalist Roberto Morrione deserve special mention, such *as La RAI nel paese delle antenne: uomini e vicende del più discusso dei mass media, dall'era Bernabei all'era della riforma*, Roberto Napoleone, Roma 1978; the numerous essays by television critic Aldo Grasso, including *Lo specchio sporco della televisione. Divulgazione scientifica e sport nella cultura televisiva*, Torino, Fondazione Agnelli 1988; or the texts written by the historian Peppino Ortoleva, such as *Un ventennio a colori Televisione privata e società in Italia (1975-95)*, Giunti, Milano 1995.
For a more comprehensive view of the history of television, we refer instead to a more recent manual that provides an overview of the entire phenomenon: Grasso, Aldo, *Storia critica della televisione italiana,* Il Saggiatore, Milano 2019.

to an inquiry with particular attention to the consequences of this shift for the consumer, the television market as a whole, and, to a lesser extent, for cinema.

Firstly, to provide an overview, the main stages leading to non-linear television have been retraced. The paper will examine the foundations for the advent of on-demand, from a perspective that is still relatively unexplored today (Barra, 2022): the evolution of the structure of television schedules in relation to the role of the spectator. Starting from the study of data, presented in the text with illustrative tables, it will focus on examining how broadcasters have modified their schedules over time. The discussion will include the very first and meagre schedules of Rai during the monopoly era of the public broadcaster.; the enrichment of the state schedules at the turn of the 1970s and 1980s to face competition from local operators and foreign channels; and the innovative fixed schedule of Mediaset's channels, imported from the United States by Silvio Berlusconi. Further developments, such as the thematicization and proliferation of free-to-air channels and the possibility of isolating a single content from the programming flow thanks to the video home system (VHS) and pay-TV, are then discussed in detail.

Once the historical, legal, social, and economic contexts are clarified, we will exclusively address streaming platforms. We will explain how they have gradually introduced a new way of consuming television content, transforming a medium that was originally designed for collective viewing into an activity that, as quantitative data demonstrate, occurs individually, at any time of the day, from different places, and on multiple devices. The "black box" theorized by Jenkins is now a utopia. To fully comprehend this epochal change, we will look at the stages that led to the diffusion of on-demand in Italy: the first attempts by telecommunications companies, the role played by the country's main television operators, and the arrival in Italy of the world's major streaming giants. The second chapter will then present the landscape of on-demand portals in Italy. It is anticipated that the non-linear scenario is highly fragmented, as there are different kinds of platforms that, depending on their type, pursue very different objectives. Furthermore, it will be demonstrated the great complexity of platforms, both from a technical and commercial point of view, and their contradictory nature, since on one hand they try to go beyond the model proposed by linear television, but on the other hand, in order to gain public acceptance, they inevitably end up inheriting certain aspects of that model.

This expertise will be used in the third moment, which will explore the impact of on-demand on the audiovisual sector as a whole and on users. The experience gained during an internship at a local television station has been helpful in understanding the main tools and reports produced by national and private agencies, as well as in acquiring the skill of data analysis. In particular, the data contained in the *Relazione Annuale* to Parliament conducted by the Autorità per le Garanzie nelle Comunicazioni (Agcom) will be particularly useful in assessing the economic results achieved by VOD over the last five years. The data from the annual report on TV consumption, compiled by Auditel and Censis, will testify how on-demand has made Italians more and more inclined to technological evolution, while the research carried out by GfK Italia will show the new consumption habits of the public, who are increasingly interested in TV series rather than movies.

In conclusion, given the apparent reversal of the hierarchy between big and small screens in recent years, the last section of the dissertation will examine the relationship between on-demand and cinema, highlighting some critical issues for the film industry. However, there is also a virtuous example for production and distribution in Italy: MUBI, a highly specialized platform focused on international arthouse movies, which will demonstrate how two seemingly conflicting worlds can actually converge, opening up new perspectives for the future.

CHAPTER 1

The evolution of broadcast programming in Italian television and the change in consumers' role

Throughout its history, Italian television has undergone significant changes in various areas: from the technologies used for broadcasting, to the people involved in the creation of television programmes, up to the methods of consumption. Among the various developments, one of the most noteworthy is undoubtedly that concerning the structure of television schedules. An in-depth analysis of this phenomenon shows that these modifications are closely linked to the progressive change in the role of the viewer.

Over time, the consumer has indeed grown up with new needs and new attitudes, evolving from a passive spectator, who organised his time around the timetable of the broadcaster and adapted to the topics covered from time to time by the only national channel, to a user who wants to be able to watch programmes at any time that meet a specific need or interest.

All this has led to a real revolution in television. In fact, the main operators have increasingly challenged the rigid content and time constraints imposed by classic "top-down" programming in order to satisfy a constantly evolving audience. Initially, it was decided to gradually enlarge the number of programming hours; later, with the aim of increasing the number of genres offered, RAI launched the *Secondo Programma*; from the 1980s, with the foundation of the Mediaset group and the birth of Rete 3, the first targeted offers were developed, i.e. schedules specifically designed to satisfy the tastes of a specific group of potential customers[2]. Finally, with the

[2] As will be seen in section 1.4, the thematicization and the multiplication of free-to-air schedules reached their peak in the early 2000s, when the transition to digital terrestrial and the simultaneous appearance of Sky in the Italian television scene set the basis for multichannel television.

introduction of the VHS[3] and the advent of pay-TV, people were able for the first time to control the timing of their viewing, i.e. to skip or speed up what they did not find interesting, to record a programme in order to watch it again, or to pause what they were viewing at any moment.

1.1 Broadcast programming: the structure of television

Before understanding the many ways in which the operators have gradually manipulated the rigidity of television schedules in an attempt to find a point of convergence with the viewers' needs, it is necessary to define what a television schedule is.

This term, chosen by the first Rai executives to designate the grid in which their transmissions were to be placed as well as the ordering principle that governs the content transmitted by the television medium, derives from the Greek word *palìmpsestos*, meaning "scraped again".

> Like a parchment from which, when held up to the light, traces of previous writings emerge, similarly, the daily or weekly schedule of television broadcasts bears signs of erasure and corrections in different colours, reflecting patterns used before, to which new additions and changes on the fly are made, holding together various decisions and points of view, showing the marks of long collaborations and sudden reconsiderations. Like a classic palimpsest, the television schedule can be used to reconstruct the logic and criteria of programming. Furthermore, just as medieval scribes patiently transcribed manuscripts, the process of formatting a schedule is also an operation that requires calm and perspective[4].

The word refers to a mutable and unstable instrument, characterised by continuous corrections and modifications, which is not definitive until the programmes

[3] For a study of the VHS tapes, reference is made to Cavallotti, Diego, *Cultura video. Le riviste specializzate in Italia* (1970-1995), Meltemi, Milano 2018.
[4] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, Laterza, Roma 2022, p. 5.

are aired[5]. These rewrites, carried out according to precise time frames, are never neutral either in terms of results or motivations, but they are done to control something, to pursue an idea or to counteract the competition and they are often caused by second thoughts, cancellations, and political pressure[6].

Broadcast programming has three different dimensions: a syntactic one, which regards the arrangement of elements, in an order based on well-defined strategies and rules; a semantic one, as the way in which the single parts are organised determines their meaning and reception (and thus their eventual success); and finally, a pragmatic one, linked to communicative purposes and used to develop and maintain a relationship with viewers through the use of advertising and the creation of *ad hoc* transmissions[7].

For the successful construction of a schedule, it is not sufficient to have planned the three above-mentioned dimensions in detail. Its success is indeed achieved when the audience follows the promo's instructions and notes down the things not to be missed. But also, and probably above all, when the public does not perceive the decision-making criteria of the editorial staff. In other words, programming operations are thus truly effective when they are invisible, when they give the illusion that it is the individual content that counts[8].

As it has been demonstrated in this analysis, the television schedule is something multifaceted and it is therefore impossible to find an unequivocal definition that contains its many façades. From an ontological point of view, it is a *macro-text*, a sort of "text of texts", which assembles the individual contents and places them in an organised and complex structure, defining the overall image of a television channel.

TV schedule is then a *mosai*c: as in Marshall McLuhan's vision, in which «the TV image consists of small pictorial dots; it is «a mosaic mesh of light and dark spots» and the medium «requires each instant that we "close" the spaces in the mesh by a

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[5] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., pp. 4-6.
[6] Morcellini, Mario, Michele, Sorice, *Dizionario della comunicazione*, Editori Riuniti, Roma 1999, p. 247, in Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., p. 6.
[7] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., p. 8.
[8] Ivi, pp. 25-26.

convulsive sensuous participation that is profoundly kinetic and tactile»[9], at the same time, the programming combines heterogeneous themes, asking the spectator to find an overall sense of them[10]. Lastly, TV schedule is a *tool* that can be used by the public to enable him or her to better understand the television offer. It is a *list* that contains the titles, technical characteristics and indications of genre, duration and air times of the programmes[11].

Considering the situation from the broadcaster's point of view, TV schedule is a synonym of *strategy*. If it is accurately planned, it can be useful not only to predict, control and eventually increase ratings, but also to establish a real bond with the audience, to win their time and to enter the viewers' minds or make them crave the channels' programmes[12]. Moreover, this strategy allows the producer to promote its transmissions, to achieve an economic goal, to pursue a well-defined editorial line and to select audiovisual programmes and choose the most appropriate segment, with the aim of ensuring that the type of customers they are addressed to have the opportunity and desire to consume them[13].

Generally, after having defined their desired target, TV stations use two types of strategies when composing their schedule: breadth or depth. Breadth is defined as the number of genres, while depth is determined by the average number of titles in each category[14]. A television schedule may contain different linguistic registers, such as information or entertainment, and consequently various types of programmes, making it more or less broad. The breadth is obviously linked to the target audience: for example, since Rai is a generalist broadcaster[15], the schedule of its main channels (Rai 1, Rai 2, Rai 3) must necessarily be very wide in order to respond to the demands of as many people as possible. On the other hand, if we consider the schedule of a channel with a strong thematic focus, the discourse is diametrically opposed: Sky

[9] McLuhan, Marshall, *Understanding Media. The Extensions of Man*, W. Terrence Gordon 1964, p.334.
[10] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit, pp. 8-9.
[11] Grasso, Aldo, Scaglioni, Massimo, *Che cos'è la televisione. Il piccolo schermo fra cultura e società: i generi, l'industria, il pubblico*, Garzanti, Milano 2003.
[12] Mittell, Jason, *Television and American Culture*, Oxford University Press, New York 2010, p.26.
[13] Demattè, Claudio, Perretti, Fabrizio, *Economia & management della televisione*, ETAS, Milano 2009, p. 31.
[14]Ivi, p. 38.
[15] Generalist broadcaster: In television terminology, a broadcaster is defined as generalist if it aims to reach the widest possible audience regardless, for example, of education, age or gender.

Calcio, which has always had the objective of attracting football fans by broadcasting national and international matches, pursues depth and segmentation.

In addition to these strategic forms, there are the so-called catch-up TVs, characterised by a wide use of archive materials; slave channels, which propose an offer equal to the one of another channel, delaying it by a few hours or a day at the most; and, finally, on-demand platforms, which will be dealt with in more detail in this dissertation.[16].

Ultimately, TV schedule is a *form of power*, or more precisely it is where power is found in television. In fact, programming choices determinate what will be seen, what will never reach viewers, and how it will be enjoyed[17]. Moreover, this tool is a powerful one as what one decides to put on air is not simply a content. It is rather something that has the power to influence people's everyday life, filling any downtime and creating a sort of routine, thanks to forms of appointment television[18]. TV programmes thus become “clock hands” that beat the different phases of domestic life and, in some cases, turn into the calendar of a nation, dictating its rhythms and milestones[19].

1.2 Rai’s monopoly: an unaware consumer

The preceding section highlighted two peculiar features of broadcast programming: complexity and mutability. These aspects are not only something embedded in the definition of TV schedule itself, but they also emerge clearly throughout the history of Italian television. In fact, over the years, the structure of this instrument has been modified so many times that it is possible to outline a history of broadcast programming.

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[16] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., p. 61.
[17] Ellis, John, *Seeing Things. Television in the Age of Uncertainty*, I.B. Tauris, London 2000, pp. 130-147, in Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., p. 14.
[18]Appointment television: strategy that consists in placing the same programme every day, with different episodes, at the same time in order to retain the audience and create a sort of routine. Mittell, Jason, *Television and American Culture*, cit., p. 370.
[19] Casetti, Francesco, *L’ospite fisso. Televisione e mass media nelle famiglie italiane*, San Paolo, Cinisello Balsamo 1995, p. 186, in Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., p. 20.

In this historical path, which will be the main topic of this second part of the first chapter, it is evident how the variations in programming logics are not only something imposed by broadcasters, but they are also linked to an increasing awareness of television users. Over time, the role of the consumer has in fact changed considerably, going from a passive spectator to a more and more demanding, free, and mature user, capable of manipulating the temporality of vision.

Seventy years ago, Italian television began its regular programming. The starting point of this historical excursus has a precise time and date: 2.30 p.m. on Sunday, 3 January 1954, when *Arrivi e Partenze,* (Id., Antonello Falqui, Programma Nazionale, 1954-1955) a short weekly programme at Ciampino airport in which passengers were interviewed, went on air. This marked the birth of Italian television and, consequently, of the first official broadcast programming[20]. The schedule of 3 January 1954, which became part of the country's history, finished at 23.15 with *La domenica sportiva (*Id., various, Rai 2, 1953-).

At the beginning, as it can be seen in *Table 1,* the schedules proved to be quite meagre, alternating moments of switching on and others of switching off. The day was divided into two blocks: the first started at 5.30 pm, lasted just over an hour and included genres specifically aimed at young viewers, such as documentaries, cartoons, and short films. The second began with the news[21] at 8.45pm and ended at 11pm, often with a second repetition of the newscast, interspersed with quizzes, concerts and movies[22].

The necessity for a supplement to this provisional form occurred after only three years and was inevitably caused by the consumer's reactions to the launch of the new media in the market. The great increase in the number of subscribers, from 24,000 in 1954 to over six million in 1965, confirmed the whole potential of television. This

[20] "Almanacco del giorno: 3 gennaio 1954, la prima trasmissione Rai accende la Tv in Italia", in *La Nazione*, 2022, https://www.lanazione.it/cronaca/almanacco-3-gennaio-9de77685 (Last consultation on February 13, 2024).

[21] Programmers scheduled permanently the first edition of the news at 20.45 only from the second week of January.

[22] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand,* cit., pp. 103-104.

prompted the Rai management to extend the hours of transmissions and to introduce advertisements to maximise ratings and, consequently, revenues[23].

Domenica 3 gennaio 1954	**Lunedì 4 gennaio 1954**	**Martedì 5 gennaio 1954**
11.00. Telecronache dirette delle cerimonie di inaugurazione degli studi di Milano e dei trasmettitori di Torino e Roma 14.30. *Arrivi e Partenze* 14.45. Cortometraggio 15.00. *Orchestra delle quindici* 15.30. Cortometraggio 15.45 *Pomeriggio sportivo* 17.30. Film: *Le miserie del signor Travet* 19.00. *Le avventure dell'arte* 20.45. Telegiornale 21.15. *Teleclub* 21.45. Commedia: *L'osteria della posta* 22.45. *Settenote* 23.15. *La domenica sportiva*	17.30. Documentario per le ragazze: *Il diario di Giulietta* 20.45. *Telesport* 21.00 Concerto vocale strumentale 21.30. Film: *Passione ardente*	17.30. Documentario per i ragazzi: *Le avventure di Rex Raider* Cartone animato: *I fratelli Dinamite* 20.45. Teledramma: *Operazione Monna Lisa* 21.00. Musica leggera*: I Love You, Je t'aime, io t'amo* 21.30. Parte della rivista *Baracca e Burattini* 22.00. Teledramma 22.30. Dibattito: *Il problema degli affitti* 23.00. Replica telegiornale

Table 1: Schedule of the first three days of Italian television (1954)

Figure 1: Arrivi e Partenze. Mike Buongiorno interviews Giuseppe Ungaretti

[23] "La storia. Date e avvenienti che hanno segnato la storia della Rai", in *Rai.it*, https://www.rai.it/dl/rai/text/ContentItem-20844e48-74d8-44fe-a6f4-7c224c96e8e4.html (Last consultation on February 13, 2024).

In 1957, a substantial breakthrough took place: the birth of *Carosello* (Id., various, Programma Nazionale, later Rete 1, 1957-1977) a ten-minute programme, in which four or five short advertising breaks were shown to separate the news from the evening transmissions. Thanks to this innovation, Rai improved exponentially its profits, which initially came only from licence fee payments. Moreover, it established also a dialogue with the country's major companies, which saw the growing popularity of television as an opportunity to promote their everyday consumer goods and services. *Carosello*, however, was not simply a way of introducing advertisements in TV schedules, but it was also a tool to engage people. Commercials were indeed not simply read out, but they consisted of comic sketches, becoming an opportunity for families to have fun and group together[24].

Figure 2: Calimero, one of the characters from Carosello

A year later, as the Table below shows, the offer was further targeted and enlarged, increasing broadcasting hours and genres. The renovated state schedule, which also included a short morning section, consisted of three broadcasting blocks: the first, called *La tv dei ragazzi*, was mainly aimed at children and adolescents; the

[24] Sanchi, Enrico, "La prima pubblicità italiana: il 3 febbraio 1957 nasceva il Carosello", in *Life&People Magazine*, 2023, https://www.lifeandpeople.it/?s=carosello (Last consultation on February 13, 2024).

second, *Ritorno a casa*, besides the newscast[25], contained current affairs and culture programmes; the third, *Ribalta accesa*, finally left room for the main contents[26].

Domenica 9 gennaio 1958	Lunedì 10 gennaio 1958	Martedì 11 gennaio 1958
10.00. Eurovisione. Slalom gigante femminile 15.45. Pomeriggio sportivo LA TV DEI RAGAZZI 17.00. Zurlì, mago del giovedì RITORNO A CASA 18.30. Telegiornale 18.45. Vecchio e nuovo sport 19.00 *Passaporto,* lezioni di lingua inglese 19.25. *Una risposta per voi* 19.40. *Viaggi musicali* 20.00. *La tv degli agricoltori* RIBALTA ACCESA 20.30. Telegiornale 20.50. *Carosello* 21.00. *Lascia o raddoppia* 22.00. Servizio: *Le nostre navi per il mondo* 22.30. *Ritratto d'autore: Gino Cervi* 23.00. Telegiornale	12.30. Eurovisione. Discesa libera femminile LA TV DEI RAGAZZI 17.00. *Il volto dei secoli: Il secolo XII* Telefilm: *Jim della giungla* RITORNO A CASA 18.30. Telegiornale 18.45. *Lei e gli altri*, settimanale femminile 19.30. Sintonia, *lettere alla tv* 19.45. *Che ne dite?* dibattito RIBALTA ACCESA 20.30 Telegiornale 20.50. *Carosello* 21.00. Commedia: *I fratelli Castiglioni* Al termine, Telegiornale	16.00. Eurovisione. Sermone delle nazioni LA TV DEI RAGAZZI 17.00 Documentario: *Il rodeo dei ragazzi* Film: *Il tormento della paura* RITORNO A CASA 18.30. Telegiornale 18.45. *Passaporto*, lezioni di lingua inglese 19.00. *Un secolo di poesia* 19.20. *Varietà musicale* 20.00. Servizio: *Terra dei fiordi* RIBALTA ACCESA 20.30. Telegiornale 20.50. *Carosello* 21.00. *I calciatori azzurri. Ritorno a Belfast* 21.30. *Il Musichiere* 22.00. *Capitan Fracassa* Al termine, Telegiornale

Table 2: Example of Rai's Programma Nazionale enlarged schedule (1958)

After ten years, *Meridiana*, intended principally for documentaries, was introduced[27].

The changes occurred between the end of the 1950s and the beginning of the 1960s, culminated in 1961 with the creation of the *Secondo Programma*, which was added to the *Programma Nazionale*. From the very beginning, it emerged the desire of creating a schedule, originally active only from 9pm to midnight, that was both complementary to that of the existing channel and hierarchically subordinate to it. In fact, the primary objective was not to develop an alternative channel that would

[25] The enlargement to new time slots not only led to greater diversification of genres, but also to an increase in the number of hours dedicated to information. Between 1957 and 1958, the 6.30 p.m. news bulletin was introduced, alongside the 11 p.m. night edition and the evening one, that was moved forward from 8.45 p.m. to 8.30 p.m.
[26] Rizzuti, Marida, Scalfaro, Anna, "L'ora della musica in tv. La divulgazione della musica in televisione dal 1954 a oggi", in *Gli Spazi Della Musica*, 2020, p.1.
[27] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand,* cit., p.123.

compete with the *Programma Nazionale*, but rather to split the programming to attract an even larger part of public more accustomed to art-house films and niche content. The establishment of two channels made also possible to implement lead-in or lead-out strategies[28]in the years to come, in order to increase the ratings of the most important transmissions[29].

In general, observing the broadcast programming of Italian television up to the end of the 1960s, we can see how they were clearly influenced by other means of communication, which at the time were more popular and hierarchically superior: «the TV schedule looked [...] like a direct extension and development of the radio schedule»[30]. The relationship with the film sector was also very different from today: movies were mostly broadcasted on Mondays not to affect the film exhibitors' incomes. For the same reasons, the flagship programme of the time, *Lascia o raddoppia* (Id., Romolo Siena, Programma Nazionale, 1955-1959) was moved from Saturday to Thursday, with special evenings of collective viewing in cinemas[31].

Figure 3: Mike Buongiorno in Lascia o raddoppia

[28] Lead-in and lead-out: link between two or more consecutive programmes, created with the aim of moving the audience from one transmission to another, and in some cases from one channel to another. A lead-in strategy is pursued when the strongest content comes first, while a lead-out one is said when the valuable title comes later.
[29] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., pp. 115-118.
[30] Ortoleva, Peppino, *Mediastoria. Mezzi di comunicazione e cambiamento sociale nel mondo contemporaneo*, il Saggiatore, Milano 2002, p. 94.
[31] Carvigno, Maurizio, "Lascia o raddoppia? Una trasmissione che ha fatto epoca", in *Passaggi Lenti*, 2019, https://www.passaggilenti.com/lascia-o-raddoppia-trasmissione-mike-bongiorno/ (Last consultation on February 13, 2024).

As regards consumers, on the other hand, it is evident how during Rai's monopoly their role was mostly passive and their freedom to choose what to watch was totally absent. Television was indeed a novelty, that from the outset was able to shape people's daily lives and set family rhythms. For example, the famous expression "*a letto dopo Carosello*" [off to bed after watching Carosello] marked the end of the day for all children, and the beginning of adult programmes[32]. At this early stage, knowing that they could only tune in at certain moments of the day, spectators adjusted their plans correspondingly and, since the choice was only limited to the two state channels, they were forced to adapt to what was offered from time to time.

1.3 New technologies and the competition in television market: the multiplication of broadcast programming

As previously mentioned, TV schedules' structures did not change significantly in the initial twenty years of Italian television. Rai was in a position of strength and absolute control over the market. Furthermore, the public, both enthusiastic about the new media and still unaccustomed to this novelty, was not mature and aware enough to express any particular need. Hence, the only changes that were made regarded: the introduction of advertisements, the extension of broadcasting hours and the birth of a second channel, which still had a rather limited programming.

This stability was lost in the following decades. Between the beginning of the 1970s and the end of the 1980s, Rai, which up to then had been the undisputed leader in the sector, had to face simultaneously an unforeseen internal competition and some external threats: foreign networks, local private broadcasters and, above all, the Mediaset group, which proposed a private offer on a national basis.

In addition, the spread of VHS technology between the 1980s and 1990s, introduced time-shifting[33], empowering consumers and undermining the entire broadcasting system.

[32] Dorfles, Piero, *Carosello*, il Mulino, Bologna 1998, p. 91.
[33] Time shifting: in television, it refers to the recording of one or more programmes on a storage support in order to view the transmission after it has been aired.

1.3.1 *Internal competition and external threats: the development of foreign networks and local broadcasters*

A very important turning point, which in effect marked the end of the state TV monopoly, was in 1974. Sentence No. 225 of the Constitutional Court allowed foreign networks to broadcast their programmes in Italy, thus enabling TeleMontecarlo, TeleCapodistria and TvSvizzera to compete with Rai[34].

After one year, the so-called "riforma Rai' was enacted. The regulation stated that the control over the public television should belong to parliament and that the information provided should be independent, complete and objective[35]. This measure, which should have had positive consequences for the national broadcaster, actually had the opposite effect.

Since all political parties had to be represented to guarantee impartiality, the direction of Rete 1 and Rete 2 was split. The reform forced a shift in the relationship between the two channels, which developed a sort of in-house conflict and went from being complementary in terms of genres to having very similar and uncoordinated schedules. This rivalry, instead of producing an enrichment and enhancement of the offer, made the overall proposal flatter from the point of view of genres, leading to the «progressive expulsion of "demanding" programmes from prime time to give space to "light" programmes, such as quizzes, variety shows and TV series»[36].

Rai's difficulties were further amplified by the proliferation of private broadcasters, who identified the lack of a programming designed for minor communities as an opportunity to enter the market. The first local television station, Telebiella, began its activity in 1971 and quickly succeeded in creating a more identity-

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[34] Corte Cost., 9 Luglio 1974, n. 225, p.7.

[35] Redazione ANSA, "Rai, 60 anni tra riforme, politica e mercato", in *ANSA*, 2015, https://www.ansa.it/sito/notizie/politica/2015/03/27/rai-60-anni-tra-riforme-politica-e-mercato_84050d8a-d1c0-4e7b-9544-05d190a64697.html (Last consultation on February 13, 2024).

[36] Pinto, Francesco, *Il modello televisivo. Professionalità e politica da Bernabei alla terza rete*, Feltrinelli, Milano 1980, p. 200, in Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., p. 130.

based communication, reporting on the events of neighbouring villages and giving voice to local people[37].

Local televisions proved to be innovative not only because they met the needs of a specific segment that had hitherto been little considered, but also as they gave value to the so-called fringe time, i.e. the hours before and after prime time, in which Rai did not broadcast at all or proposed minor contents.

The State's reaction to the entry of new challengers was ill-timed, and occurred when some competitors had already begun to plan their expansion on a macro-regional or national scale. In 1979, Rete 3 was born, presenting an alternative and non-conformist broadcast programming compared to that of the other two national channels, as highlighted by *Table 3*. In the intentions of the director of that time, Biagio Agnes, the five or six hours of daily broadcasting were meant to give more space to education, culture and regional contents[38]. The theory, however, turned out to be very different from the practice and, at least initially, the new channel, between films that were too dated, unattractive cultural rubrics and an information that was judged approximate, was not as successful as hoped.

Sabato 15 dicembre 1979	Domenica 16 dicembre 1979	Lunedì 17 dicembre 1979
18.30. *Il pollice*. Programmi visti e da vedere sulla terza rete tv 19.00. *Tg3* 19.30. Rubrica: *Tuttinscena* 20.00. *Teatrino. I burattini di Otello Sarzi* 20.05. *Omaggio a Roberto Rossellini. La presa di potere di Luigi XIV* 21.35. *Tg3* 22.05. *Teatrino*	14.00. Diretta preolimpica 18.15. *Prossimamente* 18.30. *Itinerario. Guardia piemontese* 19.00. *Tg3* 19.15. *Teatrino* 19.20. *Carissimi. La nebbia agli irti colli…* 20.30. *Tg3*. Lo sport 21.15. *Tg3*. Sport regione 21.30. *Venezia '79. La fotografia* 22.00. *Tg3* 22.15. *Teatrino*	18.30. Dipartimento Scuola Educazione: *Progetto salute. Il tempo ritrovato* 19.00. *Tg3* 19.30. *Tg3*. Sport regione 20.00. *Teatrino* 20.05. *L'Italia che tiene. Le Marche* 21.00. DSE. *Tra scuola e lavoro* 21.35. *Tg3* 22.05. *Teatrino*

Table 3: Example of one of the first Rete 3's schedules (1979)

[37] Basile, Dario, "Tele Biella, la prima tv privata italiana e quello scantinato in cui tutto iniziò", in *Corriere Torino* 2023, https://torino.corriere.it/notizie/cronaca/23_luglio_10/tele-biella-la-prima-tv-privata-italiana-e-quello-scantinato-in-cui-tutto-inizio-b9fcd26a-ebfd-47c0-b03f-7491a93f8xlk.shtml?refresh_ce (Last consultation on February 13, 2024).
[38] Salaris, Marco, "È successo in TV – 15 dicembre 1979: la nascita di Rai 3", in *Tvblog*, 2020, https://www.tvblog.it/post/e-successo-in-tv-e-successo-in-tv-nascita-rai3-video (Last consultation on February 13, 2024).

The multiplication of television schedules was disadvantage for Rai, which experienced a weakening of its position within the sector but, on the other hand, opened up new perspectives for the consumers. Users felt more represented and experienced a sort of "television abundance", a completely new situation compared to the one of the past decades, in which the possibilities of choosing what to watch grew considerably. Moreover, the further expansion of the offer in terms of hours and genres made it easier to reconcile the daily routine with television viewing and demonstrated the willingness of producers to adapt to the needs and tastes of the public.

1.3.2 *Berlusconi's revolution*

The increasing tendency to adapt to the viewer's requests, who demanded an active role in the construction of TV schedules, no longer subordinated to the choices of television companies, was confirmed by the events of the 1980s.

It is precisely in this perspective that the major changes introduced by Silvio Berlusconi must be read. Berlusconi took advantage of Rai's stalemate to adopt an entrepreneurial policy, with which he deeply transformed the Italian television scenario and set the transition from "supply television" to "demand television"[39].

The businessman from Milan bought TeleMilano in 1974, which changed its name to Canale 5 in 1980. The new company, thanks to huge investments, became quickly a nationwide network and, using the so-called *pizzone*[40], managed to unify the programming of several local realities, circumventing the prohibition for private companies to broadcast live events of any kind. Berlusconi further expanded his business with the purchase of two other networks: Italia 1, acquired in 1982 and aimed

[39] Berlusconi's arrival on the television scene marked a turning point in the history of broadcasting. For the first time, there was an evident shift from generalist television to a model of scheduling tailored to a specific target, and therefore more suited to satisfying the demands of an audience with increasingly complex needs. The type of programmes that are still broadcast on Rete 4 today are very different from those on Channel 5 or Italia 1, precisely because each channel was designed from the outset for a different public.

[40] Pizzone: set of programmes, including commercials, pre-recorded on a VHS videotape and aired by several broadcasters at the same time. Buscaglia, Simona, "Come Berlusconi ha creato le sue tv", in *Wired*, 2023, https://www.wired.it/article/berlusconi-televisioni-tv-canale-5-rete-4-italia-1-pizzone-storia/#uno (Last consultation on February 13, 2024).

at a youth target audience, and Rete 4, bought in 1984 and designed for a more mature and female public[41].

As for Canale 5's broadcast programming, which among the entire Mediaset group is certainly the one with the broadest and most generalist audience, there were remarkable differences with respect to public television. The new private network tried to be as commercial as possible and to subtract Rai's target audience with a proposal that stood out for its distinct Americanisation. For example, it was decided to import distribution models from the United States, as well as some successful TV series like *Dynasty* (Id., Richard Shapiro, Esther Shapiro, ABC, 1981-1989) and *Dallas* (Id., David Jacobs, CBS, 1978-1991) and several catchy formats (quiz shows and talk shows)[42].

Domenica 11 ottobre 1981	**Lunedì 12 ottobre 1981**	**Martedì 13 ottobre 1981**
8.30. Cartoni animati 12.00. *Superclassifica Show* 13.00. Sport e spettacolo 14.00. Telefilm. *Hazzard* 15.00. Telefilm. *Lou Grant* 16.00. Telefilm. *Una famiglia americana* 17.00. Telefilm. *Love Boat* 18.00. *Popcorn*, musicale 19.00. Telefilm. *Dallas* 20.00. Telefilm. *Phillis* 20.30. *Hello Goggi* 21.30. Film tv: *La strega di Crampton* 22.45. Film: *Furto su misura* 0.20. Film: *Anonima cocottes*	8.30. *Buongiorno Italia* 12.30. *Speciale Canale 5* 13.00. *Popcorn*, musicale 14.00. Film: *La cosa buffa* 16.00. Telefilm: *Phillis* 16.30. Telefilm: Lassie 17.00. Telefilm: *Robin Hood* 17.30. Cartoni: *La battaglia dei pianeti* 18.00. *Hello Goggi* 19.00. Telefilm: *Agente speciale* 20.00. *Speciale Canale 5* 20.30. Telefilm: *Lou Grant* 21.30. Film: *Combattenti della notte* 23.25. Notizienotte 23.30. *Speciale Canale 5* 00.00. Film: *L'ambizioso*	8.30. *Buongiorno Italia* 12.30. *Speciale Canale 5* 13.00. *Popcorn*, musicale 14.00. Film: *Quando l'amore è romanzo* 16.00. Telefilm: *Phillis* 16.30. Telefilm: *Furia* 17.00. Telefilm: *I rangers della foresta* 17.30. Cartoni: *sport Billy* 18.00. *Porpcorn*, musicale 19.00. Telefilm: *Kung Fu* 20.00. *Speciale Canale 5* 20.30. Telefilm: *Dallas* 21.30. Film: *Casablanca* 23.25. Notizienotte 23.30. *Speciale Canale 5* 00.00. Film: *I guastatori delle dighe*

Table 4: Example of Canale 5's schedule (1981)

The schedule followed a well-defined rhythm, with fixed and easy-to-remember appointments, which were constantly repeated from week to week and allowed the simulation of live coverage. This rigidity was also useful to make people

[41] "Storia delle televisioni di Silvio Berlusconi", in *Il Post*, 2023, https://www.ilpost.it/2023/06/13/berlusconi-televisioni-private-storia-mediaset/ (Last consultation on February 13, 2024).
[42] Canino, Francesco, "Silvio Berlusconi e la televisione: così ha rivoluzionato la tv in Italia", in *Panorama*, 2023, https://www.panorama.it/lifestyle/televisione/silvio-berlusconi-mediaset-rivoluzione (Last consultation on February 13, 2024).

fond of TV series and telenovelas: looking at *Table 4*, for example, it can be noted that *Phillis* (Id., Stan Daniels, Ed. Weinberger, CBS, 1975-1977) was repeated on two consecutive days and at the same time, or that *Dallas* was always broadcast in the late afternoon or early evening. This scheme made it possible to create a sort of cycle logic even for non-serial products, such as films, which were grouped by themes and potential audience and were concentrated on two specific moments of the day[43].

Advertisements occupied a large space in this grid. Commercials were no longer confined to a single time slot, as it happened with *Carosello*, or in the intervals between programmes, but they were also placed within transmissions. In addition, for the first time cross-promotion[44] was used in the television sector.

Berlusconi was able to achieve very high ratings in a short period, to the detriment of Rai, as he focused his economic efforts on everything that was considered relevant by the consumers of the time and, at the same time, was neglected by the public competitor. A clear example was represented by cinema: while Rai only gave space to this genre on Mondays, showing in the majority of the cases particularly dated titles, Canale 5 aired movies every day for four or five hours a day and bought important film packages from national (Titanus, Cineriz) and international (Fox, MGM, Paramount) distributors.

Furthermore, there were also investments in the entertainment sector, with an extensive focus on soap operas, telenovelas and cartoons, specifically included in a container programme such as *Bim Bum Bam* (Id., various, Italia 1, 1981-2002).

Lastly, Canale 5 was the pioneer for another innovation: the extension of broadcasting during the morning hours. In 1981 *Buongiorno Italia* (Id., Fatma Ruffini, Aba Cercato, Giorgio Lazzarini, Canale 5, 1981-1984, 1987-1988), an entertainment feature containing quizzes, films, cartoons and TV series, was launched. The

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[43] In the 1980s, under the direction of the television author Carlo Freccero, melodramatic films were broadcast on Canale 5 at 2 p.m. as they were more likely to be watched by housewives and pensioners, while dramatic movies, often with first-rate actors, were broadcast at 9.30 p.m., when the whole family was at home and the ratings could be maximised.

[44] Cross-promotion: In television, it is described as cross-promotion when a specific channel includes previews aimed at promoting what will be transmitted in the future on another channel belonging to the same group.

transmission had the specific purpose to keep housewives, the elderly, children and the sick company[45].

The public broadcaster responded to Berlusconi's aggressive and expansionist policy with a strategy that, rather than on renovation, aimed both at enhancing its own exclusivity and specifity and at imitating competitors. In particular, the transmission of live events was accentuated, with a special attention to news of national importance, like Vermicino's tragedy[46]. Emphasis was then placed on sports events and entertainment, with prize games such as *Pronto Raffaella?* (Id., Gianni Boncompagni, Rai 1, 1983-1985) in which the public was asked to interact from home with phone calls[47].

The just-mentioned competitive advantage ceased at the beginning of the 1990s. In 1990, the so-called "legge Mammì" definitively paved the way for commercial TV, allowing any private producer on a national scale to broadcast on-air[48]. This measure, of course, had also an effect on the construction television schedules, obliging all the main private networks to have a newscast and to include it in their daily programming. The opening up to information pluralism on one hand had a positive effect, as it increased the options available for the audience, who was no longer forced to watch public channels to hear the latest news; but, on the other hand, it created a real media battle between different broadcasters. Rai and Mediaset tried indeed to maximize their ratings, anticipating each other in giving scoops, as it happened in the case of the Gulf War in 1991, with the famous Emilio Fede's live

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[45] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., pp. 136-143.

[46] Alfredo Rampi, a 6-year-old boy, fell into a well in the town of Vermicino, sparking a massive rescue operation that captured the nation's attention. Despite extensive efforts to save him, Alfredo tragically passed away after being trapped in the well for several days. The incident garnered widespread media coverage and had a profound impact on the country, leading to increased safety measures and regulations regarding well construction and maintenance.

[47] Ivi, pp. 145-147.

[48] Legge 6 agosto 1990, n. 223, "Disciplina del sistema radiotelevisivo pubblico e privato", Art. 2. https://www.gazzettaufficiale.it/atto/serie_generale/caricaDettaglioAtto/originario?atto.dataPubblicazioneGazzetta=1990-08-09&atto.codiceRedazionale=090G0270&elenco30giorni=false (Last consultation on February 13, 2024).

speech for *Studio Aperto* (Id., Emilio Fede, Cesara Buonamici, Italia 1, 1991-) on Italia 1[49].

1.3.3 *The diffusion of VHS and the creation of pay-TVs*

Between the 1980s and the 1990s Rai was not only threatened by internal[50] and external[51] competition, but also by a series of technological developments, which heralded the need for a change in the television industry.

In 1976, the Victor Company of Japan (JVC) launched the Video Home System, a magnetic tape video-recording system which, using a four-hour running time, made it possible for anyone to store any television programme to watch it multiple times, without any additional trappings (advertising breaks, promotion, network logos)[52].

The popularity of VHS grew so much during the period we are considering that it led to the opening of video stores, shops where films and dramas could be bought or rented. The opening of such shops, combined with the possibility for consumers to choose what to watch regardless of the decisions and timing of television producers, also had a huge impact on broadcast programming.

The rapid spread of VHS changed considerably the audience, which became inevitably more difficult to satisfy. Users quickly got used to the possibility of isolating a single content from its position in the schedule and of skipping anything that was not

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[49] Striscia la notizia: *Fede e la guerra nel Golfo*, 2006, https://www.striscialanotizia.mediaset.it/video/fede-e-la-guerra-nel-golfo_49683/ (Last consultation on February 13, 2024).

[50] Section 1.2 referred to the creation of Secondo Programma which, as explained in the subsection 1.3.1, went from being a complementary channel to the Programma Nazionale to become a direct competitor in the mid-1970s. In 1979 Rai's audience was further fragmented with the foundation of Rete 3.

[51] Subsections 1.3.1 and 1.3.2 discussed respectively in more detail the role of the local channels and Mediaset in undermining the monopoly of public television.

[52] Sernagiotto, Camilla, "VCR Day, la giornata del videoregistratore: la storia del re dell'intrattenimento domestico", in *Corriere della Sera*, 2020, https://www.corriere.it/tecnologia/20_giugno_05/vcr-day-giornata-videoregistratore-storia-re-intrattenimento-domestico-ec25f198-a680-11ea-b760-0b897e2dd362.shtml (Last consultation on February 13, 2024).

considered necessary, such as commercials, and thus began to consider the schematism of classic programming as something too rigid and obsolete.

A first attempt to overcome this way of conceiving television occurred with pay-per-view, whereby the viewer paid to rewatch several times a specific event over a pre-established period. However, it is only with pay-TVs that a new form of television was really invented, which, over the years, will lead to a complete reform of the entire system.

Pay-TVs were born in England in the 1960s, but they only reached Italy between 1990 and 1991, when Telepiù presented itself to the public by broadcasting a cult movie like *Blade Runner* (Ridley Scott, 1982)[53]. The proposal consisted of three highly themed pay-per-view schedules and allowed the consumer, for a monthly fee of 37,000 lire, to experience a breadth of choice never experienced before. In the first channel, specialised in cinema, it was possible to watch films, without commercial breaks, both in Italian and in the original language, and up to sixteen hours of cartoons per week. The second one, suited to sports fans, shew the main events of football, golf, athletics, wrestling and Formula 1. Finally, the third channel had a cultural and educational programming, offering events such as concerts, ballets and operas.

Telepiù, which succeeded in distinguishing itself from traditional broadcasters and in becoming a point of reference for its customers, closed officially on 31 July 2003. When, after a period of economic crisis, the Australian entrepreneur Rupert Murdoch merged the first Italian pay TV with his major rival of the time, Stream, and announced the contextual launch of Sky Italia[54].

1.4 The transition to digital terrestrial television (DTTV)

The period just analysed was characterised by two significative events: the spread of VHS and the rise of pay-TVs. The former, made it possible to record an audiovisual

[53] Iovane, Giorgia, "Sky Italia, 11 anni fa la nascita da Stream e Telepiù", in *Tvblog*, 2014, https://www.tvblog.it/post/sky-italia-11-anni-fa-la-nascita-da-stream-e-telepiu (Last consultation on February 13, 2024).
[54] Signoretti, Fabio Massimo, "Murdoch conquista Telepiù, in Italia una sola pay-tv", in *La Repubblica*, 2002, https://www.repubblica.it/online/economia/tele/murdoch/murdoch.html (Last consultation on February 13, 2024).

product; while the latter laid the foundations for the transition from a television with a few generalist schedules, in which a single channel contains several genres, to a model in which there are multiple and themed schedules[55].

These two inventions have also revealed the great change of the public, which, in the new millennium, has matured two main needs to which producers must necessarily adapt: being able to control more and more the temporality of vision and having more freedom of choice about what to watch and from which device to do so.

1.4.1 *The success of Sky Italia*

Conscious of the importance of satisfying the new requests of television listeners, in the early 2000s Sky Italia developed an offer with which it succeeded in weakening the generalist broadcasters in all those genres considered traditionally strong and in becoming a sort of pioneer to imitate in an inevitable process of renovation.

Murdoch's company represented a rupture with the past. It proposed more than 100 channels that were extremely specific in their topics and introduced many novelties, which brought to a great success and to reach three million subscribers after only one year. The huge number of customers that the company still reports today is an indication that the consumer response was very often positive in the long term. Indeed, the new features introduced by Sky were particularly appreciated and perceived as an added value compared to the free-to-air alternatives, justifying the payment of a monthly fee.

For example, films were available a year after their cinema release, they were grouped by genre and never interrupted by commercial breaks. All the most important sport events could be seen live and simultaneously on several channels, and the latest sport news were updated in a timely and in-depth way, thanks to a specific newscast. Television series, hitherto little appreciated in Italy, became a valuable and popular genre, with both channels dedicated to niche titles (Canal Jimmy) and the ones offering the world's biggest blockbusters and original productions (Sky Atlantic). Cartoons

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[55] Barca, Flavia (a cura di), *Effetto Sky. L'impatto sulla filiera televisiva ed il sistema economico in Italia*, Rubbettino, Catanzaro 2012, p. 113.

could be watched throughout the day on major international brands' channels (Disney Channel, Cartoon Network, Nickelodeon), through offers segmented by age and genre. Cultural, music and documentary programmes, which were not particularly successful with Telepiù, were planned more carefully and were concentrated in a large production hub (Sky Arte). Information was constantly accessible on an "all news" channel such as Sky Tg24, which alternated daily news from around the world with sudden breaking news[56].

Sky Italia was not only innovative in terms of contents, but also from a technological point of view. Among the various technologies, it is certainly worth mentioning: the advent of high-definition in 2006, which improved image quality; mosaic viewing, which gave the opportunity to see different channels at the same time on the same screen; and slave channels, with which a programme could be seen on another channel an hour or a day after it was actually broadcasted.

However, the two most noteworthy services, with which the groundwork for the development of on-demand television was laid and the strict constraints imposed by linear television were circumvented, were certainly My Sky and Sky Go.

The former was officially launched in November 2005 with the aim of optimising the time spent in front of the television, manipulating what is broadcasted at will. In fact, thanks to My Sky users could personalise their viewing by restarting programmes from the beginning; recording up to two contents at the same time to watch them according to their preferences; pausing programmes, even live ones; skipping and speeding up advertisements.

The second one, instead, started on August 2012 and was created so that users could take advantage of their subscription at any time, enabling the streaming of sports, football, news and entertainment on portable devices such as iPads and smartphones[57].

To complete the overview of Sky Italia's overall offer, it is necessary to highlight how the above-mentioned content and technological innovations did not only

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[56] Barra, Luca, Scaglioni, Massimo, *Tutta un'altra fiction: la serialità pay in Italia e nel mondo: il modello Sky*, Carocci, Roma 2013, p.11.
[57] Rossi, Simone, "10 anni di Sky: i 3650 giorni che hanno cambiato la tv in Italia #Sky10anni", in *Digital News*, 2013, https://www.digital-news.it/news.php?id=34235 (Last consultation on February 13, 2024).

have positive sides. The higher availability of channels to choose from, and the possibility of using mobile devices to watch programmes, were in fact counterbalanced by the payment of a monthly subscription, and by the rental cost of the decoder. These expenses, in addition to the compulsory payment of the Rai licence fee, made Murdoch's pay TV not accessible to the entire population. In other words, this new way of conceiving television creates a paradox: the consumer has more freedom to choose what to watch and to adapt the timing of viewing to his or her needs, but at the same time this freedom is constrained, as it becomes accessible only to a minor group of people due to economic restrictions.

1.4.2 *Multichannel television*

Besides the great success of Sky Italia, the evolution of the Italian television system was also prompted in 2004 by the so-called "Legge Gasparri", which decreed the switch-off, i.e. the switching off of all analogue frequencies and the transition to digital[58].

For one thing, the switchover to digital terrestrial enabled the development of other pay-TVs, which slowed down Sky's expansion. Among these, the most structured offer was certainly Mediaset's one: in 2005, Mediaset Premium was born as a pay-per-view for football matches in the Italian championship, but within three years, it was transformed into a low-cost pay-TV, with a catalogue mainly driven by sports, reality shows, TV series and American cinema, which in some cases even managed to steal (Studio Universal) or share (Disney Channel, Cartoon Network) some channels with Sky[59].

[58] Legge 3 maggio 2004, n. 112, "Norme di principio in materia di assetto del sistema radiotelevisivo e della RAI-Radiotelevisione italiana S.p.a., nonché delega al Governo per l'emanazione del testo unico della radiotelevisione". https://www.gazzettaufficiale.it/atto/serie_generale/caricaDettaglioAtto/originario?atto.dataPubblicazioneGazzetta=2004-05-05&atto.codiceRedazionale=004G0153&elenco30giorni=false#:~:text=La%20presente%20legge%20individua%20i,e%20di%20massa%2C%20quali%20le (Last consultation on February 13, 2024).

[59] Mediaset, "Bilancio di sostenibilità 2022", in *MFE – MediaForEurope*, 2022, pp.13-14, https://www.mfemediaforeurope.com/it/sostenibilita/bilancio-di-sostenibilita/ (Last consultation on February 13, 2024).

From the other side, DTTVset the stage for multichannel television, i.e. for the multiplication of free-to-air TV schedules. Initially, the process was rather chaotic: broadcasters multiplied and tried to carve out a space in the market by presenting new more or less effective proposals. Some of them, following Sky's example, offered an extremely thematic programming (Iris, Boing, Rai News), while others alternated scraps from the generalist TV and own productions (Rai 5, La 5, Italia 2). Moreover, alongside these specific and generalist channels, there were “quasi-generalist” or “mini-generalist” networks, a sort of hybrid between the models seen above.

The multichannel phenomenon, which had partially eroded the ratings of the leading television companies, stabilised as of 2015. Whilst the major players, Rai and Mediaset, incorporated free-to-air channels of minor television publishers other ones, such as Sky and Discovery, which were already protagonists in the pay-TV world, decided to invest in free television by acquiring the frequencies of MTV and DeejayTv, renaming them Tv8 and Nove[60].

[60] Barra, Luca, La programmazione televisiva. Palinsesto e on demand, cit., pp. 174-178.

CHAPTER 2

The diffusion of non-linear television and its functioning

As the previous chapter showed, the constraints of linear programming have been increasingly challenged over time. In particular, the introduction of new technologies, the stabilisation of the Internet and the production of multifunctional media opened up the possibility to watch TV from mobile devices, leading to the so-called media convergence[61]. As a result, television has gradually lost its pre-eminent position in the media ecosystem and its role as a social aggregator. In other words, the television appointment has gradually become «something to add to the to-do list, not an element around which to plan one's day»[62].

From the 1990s onwards, it became necessary to develop a new way of conceiving television that would overcome the temporal and spatial limitations of linear programming. Various processes of innovation have therefore taken place over time, starting with the multiplication and thematicization of programming schedules, continuing with the first forms of pay-TV and pay-per-view, and culminating in the advent of on-demand platforms.

The latter proposed an alternative model for the distribution of television productions, organising consumption around two cornerstones that represented a clear break with the past and made television an even more pervasive presence in people's lives: the personalisation of viewing and the flexibility of the platform[63]. In other words, what was once a collective and familiar use of television, in which many people gathered to watch the same programme on the same screen, has been replaced by an individual activity that can be done at any time of the day, sometimes taken to extremes

[61] Media convergence: according to Henry Jenkins, media convergence occurs when the same content can be accessed on multiple platforms, and thus when two or more media can perform the same function.
[62] Mittel, Jason, *TiVoing Childhood. Time-Shifting a Generation's Concept of Television*, p.50, in Kackman, Michael, et.ali. (a cura di), *Flow TV Television in the Age of Media Convergence*, Routledge, New York 2011, pp.46-54.
[63] Tryon, Chuck, *On-Demand Culture: Digital Delivery and the Future of Movies*, Rutgers University Press, New Brunswick 2013

in long binge-watching sessions[64], in which everyone watches something different on a separate device[65] - television, tablet, personal computer - at distinct times and places.

The emergence of on-demand platforms has thus marked a real turning point in the history of television. Linear, or "top-down" programming, in which the viewer was obliged to respect schedules, as it was the broadcaster who decided which programme had to be shown at a given time on a certain channel, has given way to non-linear programming. In this new system, based on Video On Demand (VOD), the viewer took a more active role and undoubtedly benefited from greater freedom of choice, as he could enjoy the content he wanted, anytime, anywhere, for free or for a fee, via an Internet connection.

Having a key role in changing the television scenario and users' consumption habits, streaming platforms will be the focus of the second chapter of this dissertation. In particular, it will be deepened the internal divisions within the sector, the main steps that led to the proliferation of on-demand platforms in Italy, the complex mechanics of how streaming portals work and the relationship with linear television.

2.1 Classification and objectives of VOD platforms

Before discussing the stages that led to the slow spread of non-linear in Italy, it is necessary to explain in detail what Video On Demand is and why it constitutes a revolution compared to linear programming.

First of all, on-demand is a complex framework because, to work properly, its technical dimension must be accompanied by several well-articulated business strategies. In other words, the development of an algorithm that can guide the consumer's search with advice and recommendations, based on his personal tastes and

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[64] Binge watching: Binge watching is a streaming consumption practice which consists of watching several episodes of a TV series consecutively, without stopping. If carried out continuously, binge watching can turn into an addiction.
Piccoli, Michela, "I millennials amano abbuffarsi di serie tv: cosa è il binge watching?", in *Il Sole 24 Ore*, 2017, https://www.infodata.ilsole24ore.com/2017/10/15/millennials-amano-abbuffarsi-serie-tv-cosa-binge-watching/ (Last consultation on February 13, 2024).
[65] For a more in-depth look at the modes of fruition and the technologies used, the reader is referred to the third chapter.

on what is popular, has to be followed by many other initiatives. The most important of these are: the design of an interface that adequately promotes the entire offer; the creation of a catalogue with enough genres to satisfy the needs of a heterogeneous public; the establishment of a brand that sticks in the mind of the viewer and with which the customer feels he can build a connection as he shares its values[66].

Although the basic principles of on-demand portals are the same, there are internal differences within the sector, which testify their fragmented nature. Starting from the discrepancies linked to the phenomena from which they emerged, the business model adopted and the objectives to be achieved, three distinct categories of on-demand audiovisual services can be identified.

The first model, Transactional Video On Demand (TVOD), is the direct evolution of pay-per-view. It allows the consumer to pay to watch a single work of interest. TVOD can be divided into two modes: Electronic Sell-Through (EST) and rental. With the former, the user spends more money but has unlimited access to the purchased file; whereas with the latter, there are restrictions on the number of playing times or on the period during which the product can be used. Finally, for those premium products with a particularly expensive price tag, like first-run movies with parallel or alternative theatrical distribution, the term Premium Video on Demand (PVOD) is applied. Firms offering this option, such as Apple or Amazon, see TVOD as a way to build customer loyalty and create a lasting relationship rather than undermining competitors.

Besides content rental, there is Ad-based Video On Demand (AVOD), a free form of non-linear, largely driven by advertisements inserted at the beginning and in the middle of a video. This type of on-demand usually complements free-to-air programming and is considered by broadcasters, such as Rai or La7, as an opportunity to attract a younger audience and further increase the ratings of their channels. The proposal is mostly made up of archive material, recently aired programmes and live broadcasts. Purpose-made productions are rarely made available. When a portal is completely free of charge, does not require any registration and contains no

[66] For a more complete discussion of this topic, see section 2.3, in which the logic behind the workings of a streaming platform will be discussed in more detail.

advertising, AVOD becomes Free Video On Demand (FVOD). However, more often, the viewer is asked to create an account and provide basic data for profiling, which the platform uses to tailor commercials[67].

The third and last positioning is that of Subscriptional Video On Demand (SVOD), imported to Italy by some large global players as Netflix. In this case; VOD is the core business of a company, therefore there is a significant investment of economic resources in the development innovative solutions. SVOD is undoubtedly the most onerous option for clients as it involves an annual or a monthly subscription, but it is also very widespread. From the producers' point of view this system is most profitable, as consumers perceive the added value of a heterogeneous catalogue, with numerous exclusive titles and an intuitive interface that simplifies their search and increases the overall offer.

The three main typologies, with which on-demand has entered the home video, free-to-air and pay audiovisual services markets, are flanked by hybrid strategies. Disney +, Amazon and Now TV have both TVOD and SVOD; Discovery + and Mediaset Infinity are freemium platforms, with some freely accessible elements and others that must be purchased[68].

2.2 The development of on-demand in Italy

In the long and complex history of television, the spread of on-demand is a recent and not yet conclusive process. The United States was the first to experiment more systematically with non-linear programming and to give shape to a real VOD culture, followed by the United Kingdom and, soon after, by all the most important countries in the world.

In Italy, the development of on-demand has been particularly difficult, with soon-forgotten brands, abandoned strategies and false starts. The situation only changed with the entry of some major global players, like Netflix and Amazon, who played a crucial role in the transition to non-linear programming: on the one hand,

[67] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., pp. 201-203.
[68] Ivi, pp. 204-205.

some large corporations, such as Rai, Mediaset and Sky Italia, were encouraged to create a platform that was on a par with those of their new competitors in terms of technology and content; on the other hand, all the firms that had tried to enter this new market without too much conviction were definitively driven out of it.

2.2.1 *The complicated start of on-demand: the telecommunications companies*

After the stabilisation of pay TVs, which ended with the merger between Telepiù and Stream and the concomitant birth of Sky Italia, the early 2000s saw the first attempts to go beyond thematic TV schedules by introducing non-linear television.

The pioneers in this respect were the telecommunications companies, which were more inclined to technological innovation as they were already involved in the diffusion of fast Internet connections. However, the first experiments, Tiscali TV and Infostrada Tv, proved unsuccessful and were abandoned after a short time because of the obvious limitations in terms of the quality of the offer (very often there were only minor audiovisual products) and the usability of the interface (users complained that it took too long to find something of interest)[69].

In this difficult start, Fastweb's offer stood out from the rest. In 2004, the company launched On TV, a platform that used specific decoders to receive the signal. Fastweb's TV, which at the time was linked to a promotion with a fixed telephone service and Internet access, allowed consumers to tune in to the frequencies of some of the main free-to-air networks and gave them the possibility of choosing what to watch from a collection that involve films, football matches, red-light content and interactive channels. Nevertheless, the economic and social context in which the society was operating did not allow the project to take off. Due to insufficient profits, On TV ceased its activities in 2011, being replaced by Chili TV.

The new portal, founded by former Fastweb's executives and still active today, was one of the first publishing actors to emerge on the market. It was able to improve on the shortcomings of earlier attempts by capitalising on Fastweb's experience.

[69] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand,* cit., pp. 230-231

Unencumbered by the necessity of adopting a decoder, Chili TV made it possible to watch films, cartoons and documentaries on any mobile or fixed device connected to the Internet. The catalogue was much broader than that of On TV and included many valuable contents, both contemporary and archival, thanks to partnerships with international majors and the main Italian producers, such as Warner, Paramount, Lucky Red and Fandango. In addition to the paid titles, there were also some free elements in the Junior, Entertainment and Lifestyle areas[70].

2.2.2 *The role of public and private television operators*

The major broadcasters soon decided to develop their own non-linear programming, spurred on by the trials of the telecommunications operators and threatened by the possibility of losing listeners due to their entrance into the television scene. This process had two main objectives: excluding third parties from the sector and anticipating the imminent arrival of Netflix.

The first operator to make a gradual evolution towards VOD was Rai, through the Rai Click project. Originally set up as a joint venture with Fastweb, Rai Click was created in 2000 with the aim of distributing national television's transmissions on video-on-demand via Fastweb's TV. Two years later, the platform became autonomous and landed on the web, offering free access to a wide range of programmes from Rai's current schedule and archives. The different titles were divided into eight channels, each specialising in a different topic[71]. Rai Click was later replaced in 2007 by Rai.tv, which added to the above-mentioned novelties the option of watching live streams of all the national channels[72] and some previously unseen materials such as extras, specials, behind-the-scenes, video interviews and blogs. In this first phase, on-demand

[70] "FASTWEB presenta Chili", *in Fastweb.it*, 2011, https://www.fastweb.it/corporate/media/comunicati-stampa/fastweb-presenta-chili/ (Last consultation on February 13, 2024).
[71] "Rai Click entra nel Web", in *Fastweb.it*, 2002, https://www.fastweb.it/corporate/media/comunicati-stampa/rai-click-entra-nel-web/ (Last consultation on February 13, 2024).
[72] Streaming was possible for all programmes broadcast by Rai, with the exception of copyrighted productions and sporting events, as long as the connected user was located inside the country's borders.

proved to be a mere adjunct to the free-to-air offer, so no programmes were initially launched exclusively for the non-linear mode.

A substantial change of approach took place in 2014, when Rai, dissatisfied with the low revenue generated by advertising, announced the end of its partnership with YouTube. This measure, undertaken with the intention of directing users to a new platform that would be created a few years later, led to the removal of both the 40,000 videos legally posted on the broadcaster's official channel and all illegal recordings of entire transmissions or single clips[73].

The end of the agreement with YouTube was followed in 2016 by the introduction of RaiPlay, which finally provided a more complete service. By registering for free, people had no copyright restrictions on Rai's live streaming, they could catch up on previous broadcasts, and even enjoy some preview content, as in the case of the second season of *Non Uccidere* (Id., Claudio Corbucci, Rai 2015 - 2018)[74].

Other steps were taken in 2019, when it was decided to update the portal's interface, taking inspiration from other platforms such as Netflix. During the same period, there were also improvements regarding the personalisation of viewing, thanks to the implementation of some functions. The public was able to: fast-forward or rewind by ten seconds a video, modify the quality and speed of viewing, and add subtitles.

Finally, the catalogue was extended with original productions. Entertainment formats were diversified in order to satisfy the widest possible audience: from a variety show, which is still very successful today, such as *Viva RaiPlay!* (Id., Fiorello, RaiPlay 2019 -), conceived and hosted by one of the iconic faces of national television, Fiorello, to television series like *Liberi Tutti* (Id., Giacomo Ciarrapico, Luca Vendruscolo,

[73] Conti, Paolo, "La Rai divorzia da YouTube per i video", in *Corriere della Sera*, 2014, https://www.corriere.it/spettacoli/14_maggio_31/rai-divorzia-youtube-video-0cf7d404-e882-11e3-8609-4be902cb54ea.shtml# (Last consultation on February 13, 2024).

[74] The second season of *Non Uccidere* was the first audiovisual product to be broadcast on RaiPlay before being aired on television. The series immediately became a cult among Italian viewers and is still considered a prestigious title, thanks to a cast that, among the others, included Miriam Leone, Matteo Martari and Thomas Trabacchi.
Sutera, Paolo, "Non uccidere 2, la seconda stagione dal 12 giugno su Raidue (ma dal 1° su Rai Play)", in *tvblog*, 2017, https://www.tvblog.it/post/non-uccidere-2-raidue-quando-inizia (Last consultation on February 13, 2024).

RaiPlay 2019), which, with their programmatic nature, undoubtedly led the average spectator to make non-linear television a new viewing habit.

The success of RaiPlay continues to this day, proving that it is more than just a passing trend. On 13 February 2023, the last six episodes of the third season of *Mare Fuori* (Id., Cristiana Farina, RaiPlay 2020 -) were released, generating twelve million views in a single day, and setting a new ratings record[75].

Alongside Rai's actions, whose success is certainly associated with its free nature, there are the initiatives of Mediaset and Sky, which have decided to position themselves in the on-demand sector with a pay-for-service offer. In this case, the shift to non-linear was twofold. First, they developed a VOD service that was directly linked to the core business of the two brands, so as to be immediately recognisable to their customers. Then, in anticipation of possible competition from Netflix – as will be discussed in more detail in the next section – each company promoted a stand-alone platform, partially independent and aimed at a broader segment between 2009 and 2010.

The first path saw on-demand as a simple addition to existing services. Sky, in particular, adopted an incremental strategy, with complements that were gradually added to what was already offered to subscribers at the time, while Mediaset publicised each step as a huge change.

As for Murdoch's business, in 2009 the functions of the aforementioned My Sky were enhanced thanks to the introduction of Sky Selection On Demand. The new system used the decoder's hard drive to provide the public with thirty hours of programming, with four new titles each day, which could be watched over the course of a week without any time constraints[76]. This hybrid non-linear model was gradually perfected over the years until the release of Sky Q in 2017.

[75] Marino, Patrizio, "Mare Fuori 3, nuovo record: 12 milioni di visualizzazioni in un giorno su RaiPlay", in Movielayer.it, 2023, https://movieplayer.it/news/mare-fuori-3-nuovo-record-12-milioni-di-visualizzazioni-in-un-giorno_122909/ (Last consultation on February 13, 2024).
[76] Scorsone, Giorgio, "Parte SKY Selection on demand, il Push-Vod gratuito per MySky e MySky HD", in *Digital-News*, 2009, https://www.digital-news.it/news.php?id=20579 (Last consultation on February 13, 2024).

The platform was fully customisable to each viewer's tastes and made all transmissions, whether linear, on-demand or recorded, available on multiple screens. Moreover, the Sky Q box, which was extremely advanced from a technological point of view, not only reintroduced all the previous innovations (recording, pausing, restarting, the fruition from mobile devices), but also took advantage of a higher storage capacity to record up to 1,000 hours of content in HD and up to four programmes simultaneously[77].

On the other hand, Mediaset's expansion to non-linear programming was less successful than its competitors' and betrayed a series of second thoughts in the decision-making process. Premium On Demand, marketed in 2009, was based on a rather outdated technology and was never very popular due to its particularly prohibitive cost. The same fate, albeit for different reasons, befell Premium Net TV and Premium Play until they were completely dismantled in 2019.

The second path, that of stand-alone platforms, led to the birth of Mediaset Infinity and Now TV. The former had a rich film catalogue and some leading TV series, such as *Orange is the New Black* (Id., Jenji Kohan, Netflix 2013 – 2019); the latter, instead, consisted of a mix of linear and non-linear, with films, TV series, pay-per-view sports events and some original productions in the fiction and entertainment fields including *X Factor (*Id., Simon Cowell, Sky 2008 -), *Gomorra* (Id., Roberto Saviano, Sky, 2014 – 2021) and *MasterChef* (Id., Franc Roddam, Sky 2011 -)[78].

2.2.3 *The arrival of Netflix Italy and other global players*

The competitive landscape changed when Netflix burst onto the global scene. Since 2007, when Reed Hastings and Marc Randolph's business switched from DVD distribution to streaming, the US giant's expansion has been particularly rapid. The first investments in some original productions (*House of Cards*, among others, is recognised as a turning point in storytelling methods. Id., Beau Willimon, Netflix 2013

[77] "Sky Q, la tv ricomincia da qui", in *SkyGroup.sky*, 2017, https://www.skygroup.sky/it-it/article/sky-q-la-tv-ricomincia-da-qui (Last consultation on February 13, 2024).
[78] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand,* cit., pp. 235-236.

- 2018)[79] were carried out as early as 2011, taking advantage of very profitable deals with majors and big distribution companies. At the same time, Netflix began to provide its services in new territories, as Canada, the United Kingdom, Scandinavia and Latin America, until by 2016 it covered almost every country in the world, presenting catalogues tailored to each nation[80].

The entry into the Italian market took place on 22 October 2015, the same day as the platform's launch in Spain and Portugal. From the outset, the new offer represented a blow to Italian pay-TVs. Netflix, with a single monthly fee that was lower in terms of cost than Mediaset and Sky gave people access to thousands of TV series, films and documentaries, dubbed and subtitled in several languages, with no commercial breaks[81]. Mediaset and Sky, on the contrary, inevitably raised the expenses by offering separate subscriptions with different prices for each category of content[82].

The Los Gatos company's intention to fully enter the Italian media ecosystem was also certified by a large number of initiatives aimed at consolidating its presence on the national market. In particular, the catalogue has been adapted to the needs of spectators by immediately investing in a well-rounded original production like *Suburra. La Serie* (Id., Daniele Cesarano, Netflix 2017 – 2020); by recovering the rights to some TV series sold in the past (*Orange is the New Black*); by including archival content highly appreciated by the public (auteur films produced in Italy and widely known abroad, such as *La Grande Bellezza*. Paolo Sorrentino, 2013; or timeless classics like *Notte Prima degli Esami*. Fausto Brizzi, 2006) and, lastly, by acquiring the rights to other broadcasters' productions that could appeal to a target audience of all ages (*Mare Fuori*).

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[79] Cfr. Mittel, Jason, *Complex TV: The Poetics of Contemporary Television Storytelling*, New York University Press, New York 2015

[80] Lobato, Ramon, *Netflix Nations. Geography of Digital Distribution*, New York University Press, New York 2019

[81] Pesce, Maurizio, "Esclusiva Wired: Netflix conferma ufficialmente l'arrivo in Italia a ottobre", in *Wired*, 2015, https://www.wired.it/play/televisione/2015/06/06/esclusivo-netflix-conferma-lancio-in-italia/ (Last consultation on February 13, 2024).

[82] In 2016, Netflix was definitely the cheapest of all the services. In fact, the monthly subscriptions for Netflix, Sky and Mediaset Premium were €7.99, €58, and €42 respectively. However, it should be noted that Netflix only offered movies, documentaries, and TV series, while Sky and Mediaset's packages also included reality shows, sports, football, cartoons, and news.

Apart from Netflix, in the second half of the 2000s other important global brands of non-linear television reached Italy, creating a very dense and overcrowded scenario. As it happened for broadcasters in the era of multichannel television, several platforms managed to stand out and meet consumers' tastes thanks to a strong thematization and differentiation in terms of the breadth of catalogues, types of production and subscription costs. For instance, Amazon Prime Video, in addition to the integration of an on-demand offer with a fast delivery system, stood out from other competitors for the large space devoted to blockbusters and for a strong inclination towards the reality show genre (*LOL: Chi ride è fuori.* Id., Hitoshi Matsumoto, Prime Video 2021 -; *Celebrity Hunted.* Id., Alessio Pollacci, Prime Video, 2020 -). Other very successful platforms were Disney+, Dazn and MUBI, which specialise in entertainment, sport and arthouse cinema respectively.

In a context like the one just described, it was inevitable that TV and telecom companies would lose out to the cheaper and more content-rich offerings of streaming platforms. The only way to avoid the permanent exclusion from the market was to adopt a different positioning, based on original productions that are particularly attractive to audiences or on the combination between multiple services (live broadcasting of linear channels, streaming of sports events, wide choice of films).

2.3 VOD mechanics: how does an on-demand platform work?

As has been highlighted in the various steps that have marked the history of VOD, since the early 2000s there has been a gradual change towards a new way of conceiving television. From the order and sequential logic of the schedule, there was a shift to a model in which television producers gave more power to users, providing them with an almost infinite pool of titles to watch at any time and on any device.

For some television and media scholars, however, the new system gave the consumer less freedom than was originally intended. According to Chuck Tryon, objectives such as the abundance of choice, the audience participation and the personalisation of viewing were achieved almost entirely in theory[83]. Annette Markham, on the other hand, argues that the control exercised by the viewer is actually an illusion, largely due to the design and functioning of the platform[84].

Although the practical outcomes of this revolution have not always been those originally envisaged, the switch to non-linear programming has been a considerable success. So much so that, according to data collected by Gfk Italia, in 2022 each user devoted around two hours a day watching on-demand content and around 58% of Italian families owned at least one subscription to a streaming portal[85].

Nonetheless, to better understand how these results have been obtained, it is necessary to investigate the mechanics of how streaming platforms work. These are really complex and, besides being based on some aspects inherited from linear television, they require a strong integration between technical processes and commercial strategies.

2.3.1 *VOD, data and algorithms*

Analysing an on-demand platform from the supply point of view, it is evident how traditional programming methods have changed and are increasingly linked to complex mechanisms that initially appear to be purely mathematic. The management of information and content, once carried out by the broadcaster through the construction of a television schedule, is now entrusted to algorithms based on appropriately collected and evaluated consumption data.

The data used by on-demand portals is manifold and focuses on two macro themes: the description of the various titles on the platform and the behaviour of the users. Far from being neutral, this data has a dual nature that reveals the contradictions

[83] Tryon, Chuck, "TV Got Better: Netflix's Original Programming Strategies and Binge Viewing", in *Media Industries Journal*, Volume 2, 2015, p.106.
[84] Markham, Annette, et.ali. *Netflix, Imagined Affordances, and the Illusion of Control*, p. 35. In *Netflix at the Nexus: Content, Practice, and Production in the Age of Streaming Television*, Peter Lang, Lausanne 2019
[85] GfK Italia, "Piattaforme Video on Demand: analisi delle audience e opportunità", in *gfk.com*, 2022, https://www.gfk.com/it/stampa/piattaforme-video-on-demand-analisi-delle-audience-e-opportunita (Last consultation on February 13, 2024).

of on-demand. On the one hand, they are the emblem of the customisation of the offer and the abandonment of top-down programming; on the other, they demonstrate how the consumer's freedom is only fictitious, as people are constantly advised and guided by the algorithm in choosing what to watch.

Specifically, metadata describes each content in an archive. They allow the creation of content-based algorithms, i.e. tools that associate similar products in categories, both generic (macro-genres) and specific (micro-genres), according to their intrinsic characteristics. A second set of data instead studies the behaviour of the audience and groups them into homogeneous clusters, leading to algorithms that indicate what similar users have already liked (collaborative filtering)[86].

As mentioned above, the VOD algorithm is an automated system that does not seem to involve human presence in the choice of programmes. However, a more in-depth analysis shows that there are very few automatisms in personalised recommendations and that the intervention of several highly skilled professionals is more than ever indispensable for the functioning of an algorithm. Indeed, the creation of data implies the establishment of boundaries, selections and decisions. It is therefore necessary to have figures who define windows of validity or who identify the similarities and differences between the behaviour of the same user or between the behaviour of different spectators. The editorial component is thus crucial: it intervenes not only in the initial stages of design and operation, but also in determining the final results[87].

Francesco Marino explains how streaming companies constantly manipulate their algorithms. According to the journalist, even if there really is a profiling of suggestions founded on our tastes, it is quite clear how the various products are ranked in a sort of classification. Each title has a relevance score. The higher the score, the more likely it is that a particular content will appear among the recommended ones.

In some cases, the attribution of these scores is based solely on an objective assessment. In other cases, firms intervene directly to promote important original

[86] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., pp. 206-208.
[87] Avezzù, Giorgio, "I fantasmi nella macchina. Dati di comportamento e raccomandazioni personalizzate", in *Fata Morgana*, n.12, 2018, p. 97.

productions, giving them a higher rating from the outset. By doing so, the content is positioned prominently in the catalogue, views and profits can be maximised, and an organisation can easily recoup its costs.

This is exactly what happened with *Squid Game* (Id., Hwang Dong-hyuk, Netflix 2021 -): the first season was a huge success and broke all records in 2021, with around 142 million views after less than a month, a number corresponding to around two-thirds of Netflix subscribers at the time[88]. Nowadays, *Squid Game* is the most-watched non-English Tv series of all time, and its director, Hwang Dong-hyuk, has already confirmed a sequel.

There is no doubt, however, that the South Korean series owes its outcomes not only to its intrinsic value, but also to well-thought-out marketing strategies and, implicitly, to a particularly favourable positioning in the catalogue. In fact, Netflix had ensured that the trailer appeared on as many people's home pages as possible and that the product was frequently at the top of the suggestions list.

All of this further reinforces the false myth of the neutrality of the algorithm and, as in the case of television schedules, attests its function as an instrument of power. Through the manipulation of an algorithm, a company can indeed decide which series will make it past their pilot episode; how much funding they will receive for their development and, in some cases, it can dictate the fate of employees who are associated with certain projects[89].

2.3.2 *VOD, catalogue, platform branding, and interface*

In order for an on-demand portal to attract the attention of the public over a long period of time, the technical procedures just described must be complemented by curatorial operations in order to ensure economic goals to be achieved. These require a high level of care, which means looking after even the most minute details to satisfy the needs of an audience or to meet a specific demand. Indeed, it is only through the careful

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[88] "Squid Game segna un nuovo record: 142 milioni di visualizzazioni", in *Quotidiano Nazionale*, 2021, https://www.quotidiano.net/magazine/squid-game-1.6940522 (Last consultation on February 13, 2024).
[89] Marino, Francesco, *Scelti per te. Come gli algoritmi governano la nostra vita e cosa possiamo fare per difenderci*, Castelvecchi, Roma 2021

planning of commercial strategies that it is possible to guarantee the consumer a complete experience, that will entice them to use the service again and again[90].

The most immediate and obvious way in which television editors intervene in the commercial positioning of a platform is by selecting the content to be included in the catalogue and deciding which productions to invest in. The library, much like the schedule for linear television, is actually the cornerstone of programming and therefore must be meticulously projected.

At first sight, a portal's catalogue looks like a chaotic list of elements but, in reality, its composition must follow some specific guidelines. At the international level, both production funding obligations have been put in place in support of national audiovisual systems, and standards have been set in relation to the minimum quotas of European titles which must be part of a library. More precisely, in any catalogue of a platform operating in a Member State of the European Union, at least 30% of European works must be present and prominently positioned to guarantee appropriate visibility[91]. The libraries then have very distinct characteristics. Firstly, the pool of titles is finite and constantly changing. Also, modifications are mostly temporal (after a certain period of time, new works replace old ones), but spatial variations are also not uncommon, with different availabilities depending on the geographical area or on the implementation of more or less restrictive forms of geo-blocking[92].

Like traditional programming, libraries are built around the concepts of breadth (number of genres) and depth (number of items per category). To be economically sustainable and at the same time appealing to the target audience, they must be rich both quantitatively and qualitatively. Furthermore, in order to differentiate themselves from competitors, catalogues have to recreate the right mix between novelty and archive material, mainstream and niche, and also between platform exclusives and what is accessible everywhere.

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[90] Lotz, Amanda D, *Portals: A Treatise on Internet-Distributed Television*, Maize Books, Ann Arbor 2017, p. 24.
[91] Directive of 14 November 2018 of The European Parliament And of The Council, n.1808, Art. 13, https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A32018L1808 (Last consultation on February 13, 2024).
[92] Geo-blocking: Geo-blocking is a technology that restricts the amount of content that can be accessed on the Internet based on the geographical location of the viewer.

The contents in a catalogue can be divided into two clusters: acquisitions and original productions. A significant percentage is represented by acquisitions, i.e. everything from other sources or countries that was originally intended for other markets (free-to-air television, cinema) and only later reached the non-linear sector.

The purchase of distribution rights for these products does not involve ad hoc agreements, but often multiple works are sold in a single package. Their use is governed by a contract that details the terms and duration of exploitation. In general, acquisition prices are very variable and tend to be higher for recent and particularly successful films or for works for which an exclusive right is sought[93].

The second component, which better reflects the editorial and creative project of a platform, is that of original productions, i.e. all those elements created specifically for a portal and distributed by it for the first and, in some cases, only time. In this case, there is no need to obtain a licence, as the production is already fully owned. Self-produced contents are not only of prime importance artistically, but also economically. In fact, by exploiting and promoting these titles in the right way, it is possible to embark on a virtuous circle that will increase the overall value of the proposal, recruit new subscribers, and generate profits to finance future expansions[94].

However, defining commercial strategies does not only mean dealing with a platform from a content point of view, but managers must also cultivate the brand identity. Developing a believable and well-established platform brand is crucial because, in a system where users' decision to enjoy a specific title is less important than their willingness to renew their monthly subscription, it is the brand that is primarily responsible for their trust and expectations. The brand thus embodies the entire offer and determines its overall value, so it must be constantly reinforced through marketing and public relations initiatives. For example, the brand must be provided with logos, colours, and sounds that make it easily recognisable, it must be visible every time someone enters the system and in the margins of the various

[93] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., pp. 220-223.
[94] Lotz, Amanda D, *Portals: A Treatise on Internet-Distributed Television*, cit., p. 30.

contents. Finally, it needs to be included in commercials and events that boost its popularity and enhance its reputation[95].

To conclude, programmers also have the task of intervening at a structural level, focusing above all on the interface, i.e. the home page that acts as an intermediary between the database of titles offered by the platform and the viewer. The interface is not just a homepage, but the real meeting point between supply and demand. For this reason, companies must plan it carefully, making it easily accessible and creating a sort of agenda in which priorities are defined, i.e. the titles that will be highlighted and displayed in a higher position and in a larger size as soon as the page is accessed.

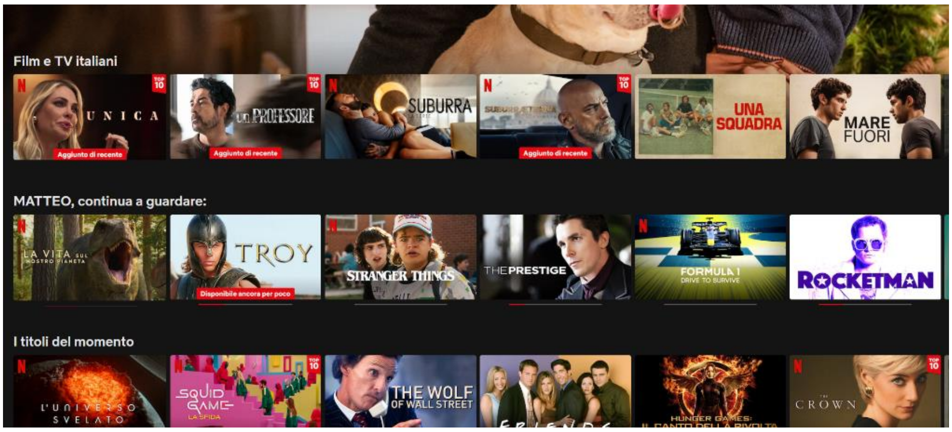

Figure 4: Example of a streaming platform interface

As can be seen in *Figure 4*, very precise conventions are usually followed in the realisation of an interface: the "New Releases" category uses a chronological order; "Originals" emphasises what is only available on the platform; "Trending Now" highlights the successful productions; "Expiring Titles" is meant to stimulate the spectator to watch a film or Tv series before it is no longer possible. In addition, other expedients can be implemented to direct the consumer's search. Sections such as "My List", "Continue Watching" and "Watch Again" encourage the user to return to past selections, while categories like "We Think You'll Love These" or "Because you watched ... you might like these" influence future decisions[96].

[95] Barra, Luca, *La programmazione televisiva. Palinsesto e on demand*, cit., pp. 216-217.
[96] Ivi, pp. 218-220.

2.3.3 *The legacy of linear television: order, flow and time*

From what has been said so far, it would seem that the operation of an on-demand portal follows logics that are completely opposed to those underlying linear television. However, as they are constantly evolving and are the result of various experimentations, on-demand portals sometimes reveal a rather contradictory nature, especially in their relationship with traditional television. Indeed. what in the early years of VOD was certainly a clear and explicit opposition to classical broadcasting models has become less and less clear-cut over time.

So much so that, after an initial phase of enormous efforts to produce a model that overcame the limitations of the past, professionals soon realised that some of the constraints they were so keen to overcome were actually linked to unavoidable necessities, and that maintaining some of the core principles of the old broadcasting, was crucial both to become more and more prominent in the sector and to attract as many viewers as possible.

Firstly, as implicitly mentioned in the in-depth discussion on commercial logics, on-demand has inherited the concept of order from classic programming. In fact, as in the previous schedules, transmissions are divided into blocks delimited by time slots. In the same way, the titles of a platform are organised within an interface into lists based on current trends, recommendations, and customised selections, and into groups related to genres, themes, and people's reactions. Although streaming platforms have lost the typical compulsory dimension of television schedules (the way free and pay TV works is that a given channel makes only one programme available at a precise hour) and have opted for horizontal rather than vertical ordering, the fundamental principle has not changed. It is necessary to arrange all the content, so that the viewer does not get lost in what appears to be an endless catalogue and is able to find something of interest in a short space of time[97].

Another way in which VOD has tried to refer to some characteristic traits of the past is by recreating the flow, i.e. the perception of a constant stream of

[97] Ivi, p. 259.

programmes, that typified the viewing experience of linear television. Obviously, the way in which on-demand allows the user to achieve this feeling is quite different from what happens with linear TV. Even if no one who watches Netflix will experience an identical stream of content, the platform succeeds in creating a sense of flow for everyone, through specifically designed paths[98].

As well as with recommendations and the almost total absence of advertising breaks, the sensation of continuity is enhanced by some stratagems that shorten the downtime between titles: buttons such as "skip intro" or "skip recap" make it possible to skip the opening theme song or the summary of the previous episodes respectively; with "see what's next" or through the automatic jump to the next episode the end credits can be avoided; sometimes, after watching a film, a screen shows all the similar alternatives; thanks to the random playback zapping can be simulated, helping those who don't know what to watch to prevent a fruitless searching.

The third borrowed aspect concerns temporality and seems to clash with the motivations behind the launch of on-demand platforms. In the face of the attempt to promote a personalised and individualised fruition, free from temporal and spatial constraints, the publishers of non-linear try to reconstruct a kind of collective vision, to fight against spoilers and indifference towards new releases and to increase audience hype.

Efforts have been many and quantitively different amongst each other. For instance, Teleparty has introduced group watch, whereby subscribers of the main on-demand platforms can form a group to comment on and watch a film or TV series on several screens at the same time. In some situations, in order to adapt to the rhythm of television schedules and to give people enough time to discuss what they are watching and to formulate future hypotheses, the distribution of content broadcasted on linear television in some countries also follows a weekly schedule, with fixed times and days, on streaming portals.

[98] Johnson, Derek, *Pop. Television Guides and Recommendations in a Changing Channel Landscape*, p.10, in Johnson, Derek, *From Networks to Netflix. A Guide to Changing Channels*, Routledge, London 2018

However, the moment when, more than any other, an endeavour is made to recreate as much as possible a sort of collective viewing is when a flagship title has to be publicized. In this case, programmers usually pursue a day-and-date logic, releasing the same product almost simultaneously in all markets. In the days leading up to the actual launch, intense marketing campaigns are prepared to build public expectations, with the aim of concentrating the binge-watching sessions of fans and the discussions of experts in a short period of time.

Sometimes the necessity to synchronise viewing is so high that marketing managers also plan special operations, culminating in collaborations with linear television. One of the most significant examples in Italy dates back to 3 July 2019, when Netflix entered into a partnership with Mediaset to promote the third season of *Stranger Things* (Id., Duffer Brothers, Netflix 2016 -). The cooperation between the two companies involved both social channels, with promotional posts featuring the slogan "The 80s are coming back", and television programming. In fact, Italia 1 changed its logo and schedule for the occasion, airing 80s themed films throughout the day.

The commercial tie-in caused quite a stir, as it was the first time that a TV network had openly decided to endorse a relevant production from a streaming platform that was normally considered a competitor. This turning point demonstrated, at least in Italy, how the linear and the non-linear, rather than being in opposition, need each other: on-demand proved its economic power, investing huge amounts of capital to "colonise" the schedules of generalist TV, and supported Italia 1 in the reaffirmation of its centrality for a young audience. On the other hand, this agreement in question showed, on the basis of the data available[99], the strong position traditional television in terms of ratings and the urgency for VOD to find promotional channels to act as a driving force in the conquest of the generalist public[100].

[99] Santoro, Pier Luca, "Ad Ottobre 24.6 Milioni di Italiani Davanti la TV Lineare nel Prime Time", in *DataMediaHub*, 2019, https://www.datamediahub.it/2019/11/25/ad-ottobre-24-6-milioni-di-italiani-davanti-la-tv-lineare-nel-prime-time/ (Last consultation on February 13, 2024).
[100] Armelli, Paolo, "Italia 1 promuove Stranger Things: la tv generalista si piega allo streaming?", in *Wired*, 2019, https://www.wired.it/play/televisione/2019/07/02/italia-1-promuove-stranger-things/ (Last consultation on February 13, 2024).

Although the integration of on-demand platforms in the audiovisual sector has not been the most straightforward, it is thanks to such initiatives that the non-linear has become increasingly relevant. In the long term, the idea of placing the spectator at the centre of programming choices has proved very successful and, nowadays - as will be seen in the next chapter - VOD is so popular that it is changing consumption habits and dictating new trends in both television and cinema.

CHAPTER 3

The impact of on-demand platforms in the television sector and its implications for cinema

From the very beginning of this discussion, the role of television in the media ecosystem has been highlighted as a tool for entertaining audiences, informing them about events and possibly influencing their opinions. In particular, the first two chapters showed how the popularity of the medium has grown considerably over time.

The culmination of this process undoubtedly was the introduction of VOD, which led to major innovations in the way content is enjoyed and allowed the emergence of serial audiovisual products. Moreover, non-linearity has allowed viewers to be much more involved in the choice of programmes than in other media such as radio or cinema.

After an in-depth study of the evolution of the structure of television schedules, an analysis of the functioning of the platforms, the way in which they have spread in Italy and the strategic positioning of the major players, this third part will provide data on the results obtained by on-demand. More specifically, the impact of VOD on the television sector will be investigated from three points of view: the economic results achieved, typical user behaviour and new consumption habits, and the propensity towards digitisation.

Finally, the last part of the chapter is devoted to the partly positive and partly negative reflections of the success of non-linear television on the film world. On the one hand, issues related to the impoverishment of cinema will be discussed, such as the limited distribution in cinemas and the exclusive release of directors' cuts[101] on streaming portals. On the other hand, the case study of MUBI, a platform specialised in arthouse cinema, will demonstrate how the technologies implemented with on-

[101] In filmmaking, the term director's cut refers to the version of a film that most closely reflects the director's ideas and vision. The director's cut often differs in editing and length from the version distributed by the film company, making it more explanatory.

demand have had a positive influence on cinema, making available to the public films that would otherwise have been accessible only to a narrow niche.

3.1 The economic impact of VOD

The introduction of VOD certainly had a significant economic impact: in recent years, on-demand audiovisual services have gradually increased their incidence in the TV sector, proving to be a key driver. Moreover, they have been representing a revenue opportunity for a growing number of companies[102], which has contributed to undermine the solidity of the narrow oligopoly (Rai, Mediaset, Sky) that has been the epicentre of TV content distribution in Italy for several decades.

3.1.1 *The role of non-linear in the slow recovery of the TV market*

One of the most exhaustive reports to asses the actual impact caused by the implementation of VOD is the *Relazione Annuale al Parlamento* carried out by the *Autorità per le Garanzie nelle Comunicazioni* (Agcom)[103]. This annual report describes the financial performance of the information & communication sector, one of the country's largest markets in terms of turnover[104]. Among the various parts which make up the dossier, for example, a section is dedicated about the situation of telecommunications and postal services companies, the protection of consumers. But the part which is given the most attention, and which is the most relevant for this

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[102] The creation of streaming platforms as a complement to the free-to-air offer by the main broadcasters operating in Italy, as well as the entry of the largest global platforms into the Italian on-demand market, are issues that were dealt with in more detail in sections 2.2.2 and 2.2.3 of Chapter 2. In addition to all the companies mentioned in the previous chapter, Disney+, Pluto Tv and Paramount+ have been added to the scenario in 2020, 2021 and 2022 respectively.
Bruno, Fernando, et ali. *La televisione del futuro. Le prospettive del mercato televisivo nella transizione digitale*, Il Mulino, Bologna 2023, p.330.

[103] It is an independent administrative authority in Italy, established to regulate and supervise the telecommunications sector, broadcasting, and media in general. Among its main tasks are promoting competition in the communications market, protecting consumers, monitoring the quality of communication services, and allocating radio and television frequencies. Agcom is responsible for ensuring compliance with Italian and European regulations in the communications sector.

[104] In the ISTAT annual report, which periodically describes the country's economic scenario, it can be seen that information & communication, which include the media mentioned in *Figure 1*, are among the most important factors in the final determination of GDP.
Cfr. Istat, *Rapporto Annuale 2023. La situazione del paese*, Roma 2023.

discussion, concerns “Media”. Let’s read the first section: ‘The media in the Italian economy’.

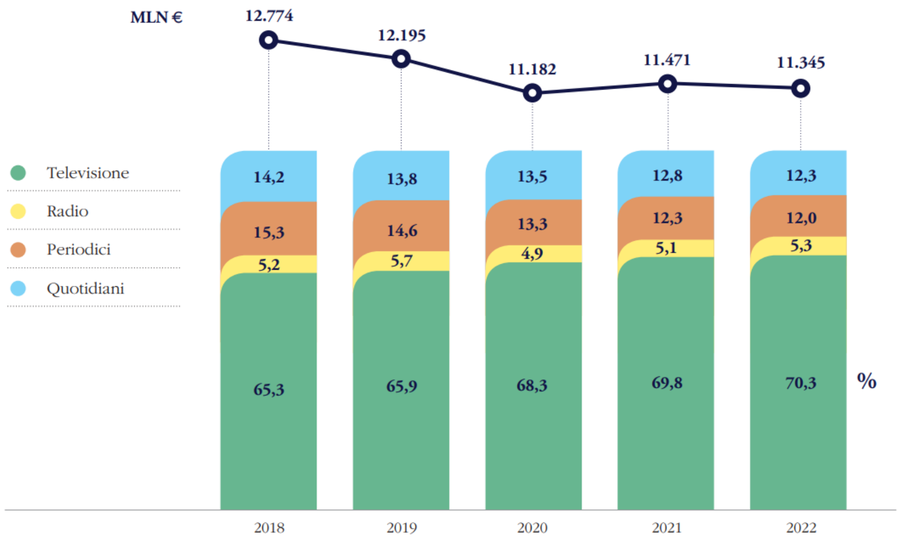

Figure 5: Distribution of total revenues by medium (% million)

The document published by Agcom in 2023 discloses the overall earnings of the Italian media market[105]. As shown in *Figure 5*, revenues in 2022 amounted to 11,345 million euros, meaning a slight decrease compared to the previous year (-1.09%) and confirming the negative trend that started in 2019. A percentage that is not concerning when analysing the gap between television and other media, which has persisted for several years. Specifically, while television accounts for 70.3% of total revenues and has experienced constant growth over the last five years, publishing has been in continuous decline for at least a decade and now, including magazines and newspapers, it represents less than a quarter of total income (24.3%).

Considering only the data presented so far, it might seem that television has undergone a development that has affected all its components over the last five years. However, the scenario is much more complex and stratified: the rise in the contribution of television to the sector's overall revenue and the 7.9 billion in revenue generated in 2022, can be explained by the consolidation or recovery of certain types of offers, which have made it possible to counterbalance the decline in other factors.

[105] Agcom, *Relazione annuale 2023 sull’attività svolta e sui programmi di lavoro*, Roma 2023, p. 40.

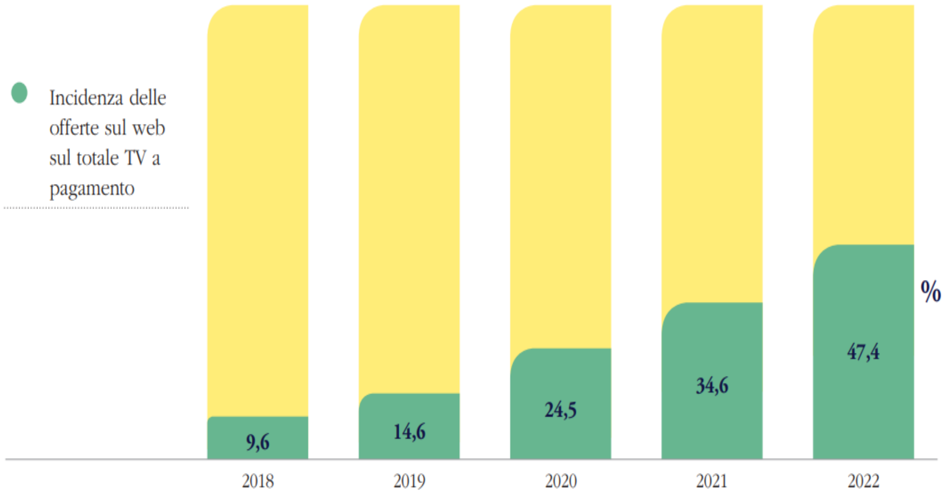

Figure 6: Share of web offers in pay-TV revenues (%)

The analysis of the evolution of the different components leads to some conclusions[106]. Firstly, comparing pay-TV with free-to-air TV, it can be observed that the latter generates the majority of revenues (around 60%, or almost EUR 4.8 billion) and that, unlike pay-TV (-0.89% from 2019), the free offer (+8.37% compared to 2019) has managed to recover from the negative repercussions of the pandemic[107].

Secondly, *Figure 6* shows a progressive transformation in the composition of pay-TV and a clear contrast between the trends of the two elements. In concrete terms, the crisis in pay-TV and in advertising sales on pay-TV channels is offset by the marked growth in web-based services (SVOD subscriptions, rental of individual events via EST and sales of single audiovisual products). These have more than quintupled the overall importance of pay-TV in five years, reaching a surplus of EUR 1.5 billion in 2022[108].

Phenomena such as Mediaset Premium ceasing its service at the beginning of 2019, taking to an end what until then was the only pay-TV platform on digital terrestrial (DTT) as an alternative to satellite, and Sky's increasing difficulties in attracting subscribers, testify to the decisive change of course that is taking place in Italy. People are indeed relying more and more on on-demand to enjoy different

106 Ivi, p.41.
107 Ivi, p. 42.
108 Ivi, pp. 43-44.

genres, to the detriment of pay-TV, which is not able to replicate the same level of influence as in other nations (especially the UK)[109].

3.1.2 *Towards the end of the Rai-Mediaset-Sky oligopoly*

From the framework, it emerges that the Italian television sector is slowly reviving after the harsh effects of the pandemic[110]. This reflects what has happened in other countries[111], although, unlike abroad, the gains are still largely due to the action of the digital terrestrial and satellite broadcasters.

	2022, in %	Differenza vs 2021 (p.p.)
Rai	**29,6**	**-0,1**
Comcast/Sky Italia	23,4	-4,5
Fininvest/MFE (Mediaset)	19,7	-0,2
Altri nazionali	5,9	-0,1
Piattaforme online	17,1	5,2
Operatori locali	4,4	-0,1
Totale	*100,0*	
Indice HHI	**2021**	**2022**
	2.122	1.908

Figure 7: Distribution of revenues per operator

In particular, *Figure 7* highlights that Rai, Sky and Mediaset are still the leading companies, with around 73% of revenues. Rai, as in 2021, is in first place (with a share of almost 30%), ahead of Comcast/Sky (23.4%), which is affected by complications in attracting new subscribers, and the Fininvest group (19.7%). The above table depicts a situation in which the dominance of classic enterprises is only apparent. Among the other players, the rapid expansion of online platforms should be noted, which, thanks

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[109] Bruno, Fernando, et. ali. *La televisione del futuro. Le prospettive del mercato televisivo nella transizione digitale*, cit, p.328.

[110] According to Agcom's *Relazione Annuale*, 2020 was a particularly tough year, both for the TV market and for the media sector as a whole. In fact, revenues after Covid-19 were the lowest of the last five years (2018-2022).

[111] ITMedia Consulting's XXI *Rapporto Annuale*, which analyses the evolution of television in Europe, predicts stagnating revenues in 2022 (+0.5% year-on-year), but still a growth after the decline in 2020. Cfr. ITMedia Consulting, *Turning Digital*, 2023

to the attractiveness of the premium content that characterises their offer (films, TV series, sports events), are playing a central role and together constitute the 17% of the economic resources of the TV sector (+5% compared to 2021, the only value to increase with respect to the situation of the year before)[112].

This thus confirms that the scene is far from static and that competition between the various distributors is fierce due to the entry of new over-the-top (OTT) operators, i.e. entities offering video services over an Internet network. It is therefore not surprising that, according to Agcom's estimates, the Herfindahl-Hirschman Index (HHI)[113] is constantly decreasing, attesting to a lower level of concentration on the market (from 2019, when the index in question was over 7,000 points, to 2,112 points in 2022)[114]. The HHI analysis reinforces a pattern already implicit in the preceding chapters, both for linear TV and for the on-demand world[115]: the gradual broadening of consumer choice and the end of the oligopoly of the incumbent broadcasters.

3.2 An increasingly digital country

Besides helping the audiovisual market to partially overcome Covid-19, the introduction of VOD has boosted Italy's technological development and has also brought changes in the type of instruments used for entertainment and information.

Nowadays, the access to audiovisual products is no longer limited to the television screen, but it also includes a variety of alternative equipment connected to the Internet - PCs, tablets, smartphones - depending on what people want to watch, how much time they have and where they are[116]. However, although the rise of

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[112] Agcom, *Relazione annuale 2023 sull'attività svolta e sui programmi di lavoro*, cit, p.42.

[113] The HHI index, which is mainly used in economic statistics, is a measure of the degree of competition in a market. The value of the HHI ranges from 0 to 10,000. The higher it is, the more concentrated the market is, and the lower the number of operating companies within a specific sector.

[114] Agcom, *Relazione annuale 2023 sull'attività svolta e sui programmi di lavoro*, cit, p.42.

[115] Paragraphs 1.4.2 and 2.2.3, to which it is necessary to refer for further details, deal with the issues of multi-channel television and the arrival in Italy of the main producers of on-demand audiovisual content. In both cases, these phenomena have made it possible to meet the needs of the public by increasing their freedom of choice, to the disadvantage of the existing broadcasters which, on the contrary, have suffered a significant reduction in their audience share.

[116] Consumption patterns in the audiovisual sector vary widely. Television viewers tend to spend many hours watching films or TV series, while smartphones are used to watch short videos.

streaming has inevitably eroded the ratings and the attractiveness of traditional TV, the same has not happened to the television screen. TV screens have lost their weight in terms of audiovisual consumption, but they have managed to resist change and evolve in step with other media, maintaining exclusivity in terms of access to linear programming and acquiring a certain importance in the field of on-demand.

3.2.1 *The rise of connected screens*

The sixth edition of the Auditel and Censis annual report on television consumption consolidates the hypothesis that Italy is becoming a digital country, with individuals owning a multitude of electronic devices. By now, millions of Italians use the Internet in different contexts - from work, to leisure, to study - and more and more people are using technological devices to access streaming TV content.

Figure 8 shows a strong propensity to digitisation. By 2023, households will have around five screens, with each individual owning an average of two. The total number of technological items in Italians' homes is 122 million, a value that corresponds to an increase of 2.2% compared to the previous year and +9.6% with respect to 2017[117].

Device	2023	2017-2023		2022-2023	
	(in milioni)	diff. assoluta	var. %	diff. assoluta	var. %
Apparecchi televisivi *di cui:*	43,4	0,6	1,5	0,5	1,2
Smart TV o dispositivi esterni connessi	*18,7*	*13,4*	*248,6*	*2,0*	*12,1*
Personal computer collegati a Internet	20,4	1,2	6,1	-0,3	-1,4
Tablet	7,6	0,2	3,0	-0,1	-1,3
Smartphone	50,6	8,7	20,7	2,5	5,2
Totale *device*	**122,0**	**10,7**	**9,6**	**2,6**	**2,2**
Totale device connessi	*97,3*	*23,4*	*31,7*	*4,1*	*4,4*
Numero medio di device	*5,0*	-	-	-	-
Numero medio di device connessi	*4,0*	-	-	-	-

Figure 8: Types of devices in Italians' homes

Bruno, Fernando, et. ali. *La televisione del futuro. Le prospettive del mercato televisivo nella transizione digitale*, cit, p.318.

[117] Auditel, Censis, *Sesto Rapporto Auditel – Censis. La nuova Italia televisiva*, 2023, p.8

These data, which may seem insignificant at first glance, take on a completely different meaning and a much larger scale if we consider only the number of connected screens, i.e. all the devices that make it possible to watch both all the programmes broadcast on linear television and those available on the Internet. In 2023, the sum of connected smartphones, smart TVs, personal computers, and tablets was just over 97 million (+4.4% compared to 2022 and +31.7% over the last seven years)[118].

However, to really understand the scale of the phenomenon and to be able to formulate hypotheses about what is likely to happen in the future, it is necessary to dig deeper into the overall data mentioned above, and look at the variations in the number of each equipment over time.

The most widespread (50.6 million), as indicated in the preceding table, are smartphones, whose proliferation over the last seven years has been favoured by certain characteristics such as portability, ease of use and flexibility. Currently, each household has an average of two mobile phones, and this trend is likely to continue in the coming years, albeit at a slower pace. In second place, with 43.4 million, are televisions. More than any other device, these reflect the technological consequences of the success of VOD. The value just mentioned shows a slight increment in comparison with 2017 (+1.5%). Though noteworthy, this is not enough to explain the epochal change in these appliances, which will be discussed in more detail in the following section. The third position is occupied by computers, both fixed and portable. Again, the opposite changes (+6.1% with respect to 2017, -1.4% over the past year) do not fully clarify what has happened in this segment, where a partial substitution of fixed computers by laptops has taken place. An analysis of the annual reports, when compared, reveals how the Covid-19 has led to the saturation of the latter, which have reached their maximum number per dwelling unit. The share of laptops is therefore expected to remain more or less stable in the coming years. Finally, there are tablets, which before the pandemic seemed destined to be replaced by smartphones and laptops. Instead, they experienced a real revival during the

[118] Ibidem.

quarantine, as they proved to be the perfect medium for gaming, distance learning and on-demand content consumption[119].

3.2.2 *The transition from traditional TV to Smart TV*

As it was anticipated in the previous section, smart TVs are the device that has benefited more than any other from the rise of VOD. This new type of TV, capable of connecting to the Internet and integrating various functionalities, has become the perfect medium for watching both traditional free-to-air TV programmes and titles from on-demand platforms[120]. In particular, 2023 marked a real turning point in this technological development, as smart TVs caught up with and surpassed traditional TVs for the first time in history, after an uninterrupted growth of at least fifteen years.

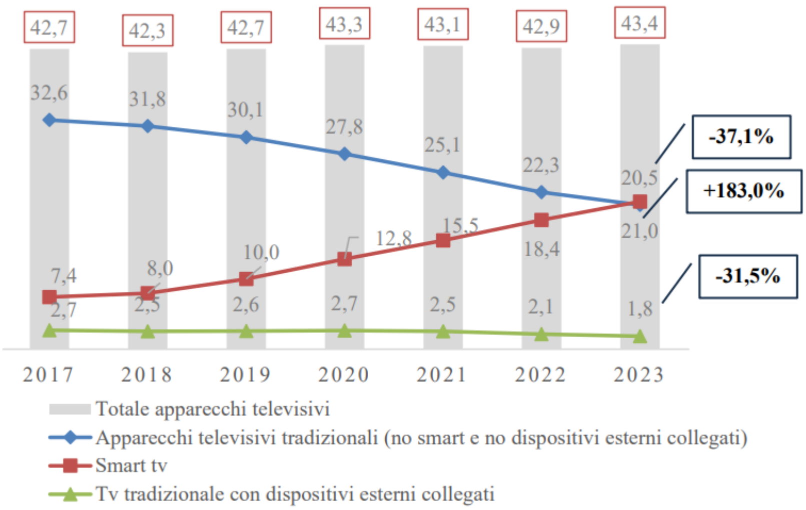

Figure 9: Televisions in Italian households by type (2017-2023)

The graphics in *Figure 9* immediately highlights the transition that has just occurred: in 2017, there were 32.6 million traditional TVs and only 7.4 million smart TVs. By 2023, the situation has completely reversed: traditional TVs have shrunk to just over 20 million (-37.1%), while smart TVs have tripled to 21 million (+183%)[121].

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[119] Ivi, pp. 9-10.

[120] According to a survey on the home entertainment sector, carried out in 2022 by GfK Italia on behalf of Univideo, the most used medium in Italy for on-demand viewing is the smart TV, with a share of 68%.

GfK Italia, *Rapporto Univideo 2022*, Milano 2022, p.24.

[121] Auditel, Censis, *Sesto Rapporto Auditel – Censis. La nuova Italia televisiva*, cit; pp. 11-12.

As they are not prohibitively expensive, smart TVs have had a very high penetration rate in Italian households. Currently, the majority of Italian households (60.3%) have at least one Smart TV in their home (+134.9% compared to 2017), and among these, a significant percentage have more than one (20.4%). More specifically, the population groups that own two smart TVs and three or more smart TVs are also those with the highest growth rates over the period analysed (+360.3% and +693.5% respectively)[122].

The substitution of TV sets is not only a synonym of a technological progress, but has other implications as well. First of all, it certifies how an individual way of watching television is emerging[123]. The viewer is no longer a mere spectator of television programmes, but wants to be the creator of his own schedule. They therefore need a tool that allows them to watch what interests them at any time of the day, combining live and rerun, linear and non-linear, clips and transmissions in their entirety.

Secondly, in a kind of synergy in which both VOD and smart TVs have mutually benefited from each other's development, it can be argued that the evolution of TV sets has also had an effect on the consumption of audiovisual products, favouring some genres and discouraging others. Larger and more advanced televisions[124] have improved the quality of the images and have contributed to turn Italians' living rooms into cinemas. A detail that motivate the crisis, attributed to the Covid-19, whereby people have become less active and have adopted a more sedentary lifestyle[125], preferring to stay at home and watch a television series rather than go to the cinema to see a film[126].

[122] Ivi, p. 13

[123] For more details, see the introduction to Chapter 2, where the practice of binge-watching is discussed in detail

[124] In 2023, TV sets smaller than 32 inches were less and less popular, while those larger than 50 inches were rising. The cathode ray tube screen has almost definitely given way to plasma, liquid crystal, or LED flat screen TVs. Full HD has become obsolete and has been replaced by 4K, which has four times the number of pixels and can transmit even sharper images.
Auditel, Censis, *Sesto Rapporto Auditel – Censis. La nuova Italia televisiva*, cit; p. 16.

[125] A recent Censis survey on home security shows that Italians are spending more and more time at home. 91.1% of respondents consider the home they live in to be comfortable, 77.5% consider it to be adequately equipped and 60.9% spend more time there than in 2019.
Cfr. Censis, *Osservatorio sulla sicurezza della casa. La casa che vorrei*, 2023.

[126] For a focus on the relationship between the consumption of films and TV series, see section 3.3.4.

3.3 New consumption patterns and user behaviours

The data collected by Agcom's Communications Observatory and the report carried out jointly by Auditel and Censis on the diffusion of Internet services have shown that this phenomenon has had an even more profound impact, affecting several generations of consumers in different ways.

Users who have adapted to the new service have in fact introduced new behaviours, such as multi-homing and churning, which reflect the constant mobility of their preferences. In addition, there are new consumption habits, as evidenced by the TV ratings of recent years, the increase in the number of hours devoted to TV series and the reduction in the time spent watching movies.

3.3.1 *The evolution of television ratings: the decline of linear television and the growth of on-demand*

When it comes to new consumption patterns, one of the most important topics regards the recent change in television ratings, which highlight how Italians are increasingly substituting linear broadcasting with streaming.

From 2019 onwards, all the main SVOD platforms have seen an upturn in the average number of unique monthly users. The most notable growth – partly attributed to the initiated restrictions on shared subscriptions – was undoubtedly that of Netflix, which has increased its audience from six million in 2019 to 8.8 million in 2023 and which, in September 2023, reached a total of 272 million hours of watching time since the beginning of the year. The positive trend of Reed Hastings and Marc Randolph's company has been replicated, albeit to a lesser extent, by its main competitors: Prime Video, although more sensitive to fluctuations in demand, currently has 6.5 million average viewers (2.4 million in 2019); since its arrival in Italy in 2020, Disney+ has brilliantly overcome the physiological uncertainty of 2021 (2.4 million viewers and 12 million total hours of portal use), achieving 3.5 million users and 18 million hours of navigation in 2023. Finally, Dazn too, driven by its exclusive Serie A Italian football championship, continues its expansion in the parameters considered[127].

The data on AVOD portals are decisively assessing the must-have tendency towards streaming services. Over the five-year period considered, Rai, Sky and Mediaset have suffered minimal losses both in terms of listeners and total use of their online services, mainly due to the stabilisation of RaiPlay, Sky TG24 and News Mediaset Sites respectively[128].

All the elements mentioned so far support the thesis of a gradual shift of users' attention from traditional television to web offers, which is even more striking when taking into account the Observatory's data on the evolution of linear television audiences on digital terrestrial and satellite.

According to the Observatory's research, in the first nine months of 2023, the average number of spectators throughout the day[129] was 8.07 million, a decrease of about 240 thousand (-2.8%) compared to the corresponding value of 2022 (8.31 million). This pattern does not change if the analysis is restricted to prime time[130] only (between 2022 and 2023, the number of people watching fell from 19.12 million to 18.64 million, i.e. a reduction of 2.5%). Finally, the loss of interest in linear television takes on an even more pronounced dimension if we extend the period under consideration, measuring the changes from 2019 to 2023: the drop in the whole day was 10.4%, while the drop in prime time was 11%[131].

[127] Agcom, *Osservatorio sulle comunicazioni*, n.4, Roma 2023, pp. 28-29.
[128] Ivi, pp.30-31.
[129] The time slot used to calculate the average number of viewers throughout the day is between 02:00 and 23:59.
[130] In television terminology, prime time is the time slot corresponding to the early hours of the evening - from 20:30 to 22:30 - when the highest viewing rates are achieved. It is usually reserved for the most popular programmes on each channel.
[131] Agcom, *Osservatorio sulle comunicazioni*, cit, p.14.

Gruppi televisivi	2019	2020	2021	2022	2023	'19-'23	'22-'23
Mediaset	3,04	3,47	3,15	3,07	3,03	-0,4	-1,5
RAI	3,48	3,83	3,66	3,16	3,01	-13,7	-4,9
Warner Bros. Discovery	0,72	0,86	0,75	0,67	0,68	-4,7	1,4
Comcast / Sky	0,71	0,72	0,63	0,61	0,61	-14,7	-0,9
Cairo Comm. / La 7	0,41	0,42	0,37	0,37	0,31	-25,9	-16,2
Altri	0,65	0,66	0,53	0,42	0,44	-31,4	4,6

Figure 10: Average daily viewers over the whole day between Jan.-Sept. (in millions)

The downturn affected the main broadcasters, as it is apparent in *Figure 10*: Rai, which for the first time since 2019 is not the dominant entity among the free-to-air TV group anymore, has ceded the palm of the first free-to-air group to Mediaset. Rai had seen a considerable decrease in the last five years (-13.7%); La 7 has undergone a real collapse (-25.9%); in the last year, although not particularly noticeable, the only broadcaster that showed signs of recovery was Discovery (+1.4% compared to 2022)[132].

3.3.2 *VOD consumption: a multi-generational phenomenon*

The consumption of on-demand content, which overlaps with or replaces traditional linear television viewing, is a much more global phenomenon than one might think, as it involves not only the youngest generations, but also those born and raised with the older model of television.

The Auditel-Censis' report essentially confirms what Agcom has already stated, but re-examines it from a different perspective, illustrating the growth rates in the number of VOD users by age group over the last six years. If in 2017 only 27% of Italians, i.e. almost 16 million, tended towards non-linear TV services, in 2023 the situation was very different, as the number of VOD subscribers (including both SVOD and AVOD) was around 26 million (45.8%). This means that, over the six years considered, the percentage of consumers has risen significantly (+66.2%), thanks to

[132] Ivi, p.15.

the decisive push of the pandemic and the launch of new, highly specialised portals (MUBI, Disney+) that complement the mainstream ones[133].

The attractiveness of on-demand platforms and the quality of their offer are further proved by data on the frequency of use, which show that this new model of television is far from being a passing fad. In particular, among the 26 million people who surf the Internet to watch audio and video content, 16.9% are avid users of streaming portals and browse their catalogue every day, 50.7% do so at least two days a week, while 20.7% only do so once every seven days. Only 11.7% use streaming occasionally[134].

Età in classe	v.a. in milioni	%	per 100 persone della stessa età	var. % 2017-2023
Fino a 17 anni	4,2	15,8	55,1	46,4
di cui:				
- 4-10 anni	*1,6*	*6,2*	*40,8*	*82,7*
- 11-17 anni	*2,6*	*9,6*	*71,3*	*29,7*
18-34 anni	7,4	28,1	72,0	40,8
35-44 anni	4,6	17,5	63,3	69,3
45-64 anni	8,1	30,8	44,5	95,4
65 anni e oltre	2,0	7,7	14,4	136,3
Totale	26,3	100,0	45,8	66,2

Figure 11: Percentage of Italians watching audio/video content using sites/platforms by age (2023)

As regards the age groups of spectators involved, *Figure 11* is particularly interesting and in some ways surprising. After an initial phase, in which the development of these services was driven by young people, who are still the most common category (72% of the population between 18 and 34 use VOD), we can read like this in 2023 the most representative segment were the adults between 45 and 64 (30.8%, or 8.1 million). The over-65s are the smallest group (7.7%), but they also detain the highest growth rate (+136.3%), suggesting that the transition to the new TV model is now affecting an older audience and that the demographic distribution of VOD viewers is converging with that of the population as a whole[135].

133 Auditel, Censis, *Sesto Rapporto Auditel – Censis. La nuova Italia televisiva*, cit; p. 25
134 Ivi, pp.26-27
135 Ibidem.

After a basic analysis conducted on the demographic distribution of VOD users, it is possible to deepen the research and examine the distribution of the audience by age and gender, focusing on the main platforms currently acting on the market.

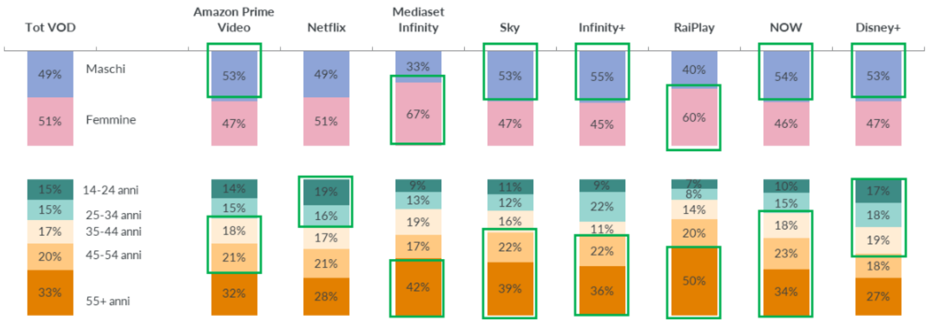

Figure 12: Users of main streaming platforms by gender and age, Jun-Aug (2023)

The data acquired by GfK Italia between June and August 2023, referred to in *Figure 12*, reveals first of all that the division of customers by gender is fairly balanced (51% women against 49% men). More specifically, there are peaks in the prevalence of female consumers between RaiPlay (60%) and Mediaset Infinity (67%), a substantial parity in the case of Netflix, and a predominance of male subscribers in all other situations.

More interesting aspects emerge when the focus is shifted to age: young people seem to be more accustomed to SVOD, preferring contents offered by Netflix or Disney+; older people, probably still keen to older television models, tend to enjoy this type of content on the online platforms of the free-to-air networks (RaiPlay, Mediaset Infinity, Sky, Infinity+)[136].

3.3.3 *Typical VOD user behaviours: multi-homing and churning*

The increase and thematising of streaming sites, as well as the proliferation of original productions not only have satisfied the needs of a multi-generational group of consumers, but has also stimulated two typical behaviours in the average non-linear

[136] GfK Italia, "I titoli più visti sulle piattaforme VOD in Italia", in GfK.com, 2023, https://www.gfk.com/it/stampa/i-titoli-piu-visti-sulle-piattaforme-vod-in-italia (Last consultation on February 13, 2024).

consumer, which can be properly defined as multi-homing[137] and churning[138]. This an actual VOD boom, due to the fact that this technology proposes new TV paradigm and yet combines it with certain inherent characteristics of the medium.

More specifically, the first feature, consisting in the simultaneous subscription of more than one on-demand service per person, has been encouraged both by the the offer expansion[139] and by the great freedom of choice guaranteed to the consumer. In other words, the possibility of organising their own TV schedules, customising individual packages according to their interests and going beyond the pre-packaged content typical of pay-TV, has led people in many European countries[140] to subscribe to multiple SVOD services[141].

The increase in audience awareness and demand, as well as by multi-homing, is also reflected by churning[142]. The manifestation of this practice is more systematic among 18–24-year-olds and more pronounced on portals dedicated to sports events than on those specialised in films and TV series. It represents a threat to companies' revenues and has been facilitated mainly by low switching costs. In fact, while in the pay-TV sector there are clauses that may hinder or prevent customers from changing their service provider for a certain period of time, in the on-demand sector it is possible to cancel a subscription and take out another one with just a few clicks, without any fine and at a very low cost.

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[137] The first scholars to theorise such behaviour in the on-demand market were the economists Jean-Charles Rochet and Jean Tirole in 2003.
Cfr. Rochet, Jean-Charles, Tirole, Jean, "Platform Competition in Two-sided Markets", in *Journal of the European Economic Association*, Wiley-Blackwell, Hoboken 2003.
[138] The term churning is used in economic language to refer to a practice of abandoning one service and/or replacing it with another. Specifically, in this dissertation, churning is used to define the rate at which a streaming platform is abandoned
[139] Currently, the catalogues of every streaming platform differ considerably, both in terms of external titles and original productions. The overlap of content is rare, occurs for very limited periods of time and mainly concerns archive material and minor works.
[140] In Europe, the number of households with three or more SVOD services continues to grow: in 2022, this percentage reached 27% in Italy, 28% in Spain, 22% in Germany and 16% in France.
Bruno, Fernando, et. ali. *La televisione del futuro. Le prospettive del mercato televisivo nella transizione digitale*, cit; p.306.
[141] Ibidem.
[142] According to a 2023 survey conducted by Deloitte on TV consumption in the European market, in 2022 the churn rate in the main European countries was around 13%, with peaks of 18% and 16% in Denmark and Austria.
Cfr. Deloitte, *Insights 2022. Linear TV and Streaming*, 2023.

It should be stressed, however, that churning does not necessarily mean a reduction in consumption: those who cancel their subscriptions as they have become too expensive in relation to their economic circumstances or because they are no longer interested in the service offered are offset by those who re-subscribe to what they had previously abandoned[143].

3.3.4 *A new hierarchy between the big screen and the small screen*

The analysis of the data allows for adding one last piece to the current discussion. The steady rise of streaming had also an impact on the type of content that Italians prefer to watch and on the hierarchy between the big and the small screen, which seems to have been reversed in recent years.

Italian cinema looks to be in a state of deepening crisis. Not only is it impossible to replicate phenomena such as *Lascia O Raddoppia*[144], but the world of cinema has to adapt to the world of television. More specifically, there has been a reconfiguration of the windows for the exploitation of distribution rights, a reduction in the period reserved for cinema-only distribution, or even, in some cases, a preview or exclusive release of some movies on platforms rather than in physical cinemas[145].

Recent productions, with a few rare exceptions such as *C'è ancora domani* (Paola Cortellesi, 2023), hardly ever achieve great economic success[146], either nationally or internationally, or manage to become part of the collective imagination. Films made in Italy or by Italian directors, such as *Per un pugno di dollari* (Sergio Leone, 1964), La dolce vita (Federico Fellini, 1960) or *La vita è bella* (Roberto Benigni, 1997), capable of becoming points of reference for international cinema, of

[143] Bruno, Fernando, et. ali. *La televisione del futuro. Le prospettive del mercato televisivo nella transizione digitale*, cit; pp.307-311.

[144] In section 1.2, *Lascia o Raddoppia* was cited as an example of television adapting to the needs of the cinema. The well-known quiz show, hosted by Mike Bongiorno. was programmed on Thursdays so as not to reduce the flow of viewers to cinemas at the weekend, and in some cases group viewing evenings were organised in cinemas.

[145] The issues related to the system of distribution rights for a film, the exclusive release on online platforms and the limited distribution in cinemas will be discussed in more detail in the following section.

[146] Armelli, Paolo, "C'è ancora domani nella top 10 dei film italiani con più incassi: quali sono gli altri?", in *Wired*, 2023, https://www.wired.it/article/c-e-ancora-domani-cortellesi-incasso-maggiore-classifica-film-italiani/ (Last consultation on February 13, 2024).

transmitting Italian culture to the world and credible candidates for important prizes in the most prestigious film festivals in the world, are now something rare.

On the other hand, in recent years there have been television series that have gained a high reputation abroad (*Gomorra. La serie, Mare Fuori*) or, alternatively, the development of some serial titles has been financed by large international production and distribution companies with the idea of exporting the productions to other countries (*Suburra. La serie*).

The popularity of the aforementioned projects and the simultaneous decline of Italian cinema have led to a real "migration" of actors from the big to the small screen[147]. Some, after an unremarkable film career, have become successful in television in their own country and have since starred in major foreign series (Fortunato Cerlino); others have built their careers almost exclusively on television series (Salvatore Esposito); still others continue to alternate between films and successful television series without abandoning either path (Alessandro Borghi).

Even just this brief summary of Italian photography highlights a European trend widely emphasized in reports and industry studies: the impoverishment of the cinema, combined with the affirmation of television series, has obviously not only caused a "migration" of actors from one genre to another, but has also encouraged the audiences to diminish their consumption of films in favour of television series.

This trend is confirmed by the aforementioned GfK 2023 report, which revealed the most watched titles on VOD platforms in Italy between June and August 2023.

[147] The migration of actors from film to television is a worldwide phenomenon. Particularly relevant were the examples of Kevin Spacey in *House of Cards* (Id; Beau Willimon, Netflix 2013-2018), Jude Law in *The Young Pope* (Id; Paolo Sorrentino, Sky, 2016) and Matthew McConaughey in *True Detective* (Id; Nic PIzzolatto, Now 2014 -).

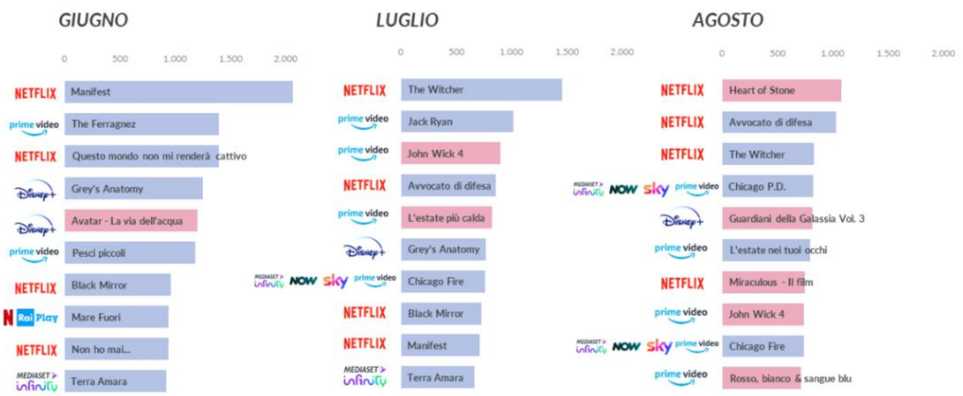

Figure 13: Most watched titles on VOD platforms - Top 10 (2023)

Figure 13 demonstrates that, thanks to the large number of episodes and seasons available, the audience spent more hours watching TV series (blue columns) than films (pink columns) during the three months under review. All the titles shown in the graph above were distributed and/or produced by SVOD platforms. Among these, the most watched were those from Netflix (15.7 million users), followed by Amazon Prime Video (12.2 million) and Disney+ (5.9 million). The top 10 varied considerably from month to month, suggesting that viewers were constantly looking for something new to watch, and at the same time they were attracted to new releases, "burning through" them in short periods of intense binge-watching sessions[148].

3.4 The effects of streaming on the film market

The development of on-demand has been so rapid and has covered so many countries in so little time that it has inevitably had a significant impact on neighbouring markets. One of the sectors that has been affected more than any other is the film industry.

At the beginning of television's history, cinema was an economically prosperous market, as well as a means of expression and entertainment considered by the masses to be hierarchically superior. The same market, over the last decade, had to conform to the new demands of the audience and to those of television, which has taken up more and more space. This reversal has also been evidenced by certain

[148] GfK Italia, "I titoli più visti sulle piattaforme VOD in Italia", cit., https://www.gfk.com/it/stampa/i-titoli-piu-visti-sulle-piattaforme-vod-in-italia (Last consultation on February 13, 2024).

legislative changes, such as the recent revision of the exclusive exploitation window for a film or the lack of sanctions for certain practices of VOD giants, which have inevitably impoverished the cinema and caused the audience's attention to shift more and more from the big to the small screen.

Once again, what is happening in Italy allows us to consider possibilities, or rather compromises, and experiments that companies are proposing. An emblematic case, in this regard, is the success of the English platform MUBI (cfr. 3.4.2). MUBI is a curated streaming service that offers a selection of handpicked films from around the world. It focuses on independent, art house, and classic cinema. One of its unique features is the rotation of its film catalogue, with one new film added every day and available for streaming for a limited time. MUBI aims to provide a platform for cinephiles to discover and enjoy a diverse range of films beyond mainstream offerings. The creation of a portal such as MUBI, which focuses on art-house cinema, has also given visibility to smaller works that would otherwise only have reached cinemas in the country of production or, at most, in neighbouring states.

The enrichment of the catalogues of the main on-demand platforms with categories dedicated to the great classics of film history has not only helped to attract a wider audience, but has also allowed the seventh art to regain its own centrality, both for a more mature clientele, who have been able to relive the films they grew up with, and for younger people, who have had the opportunity to discover the great masterpieces of the past.

3.4.1 *Brief analysis of film distribution processes in Italy and new distribution trends: limited distribution in cinemas and the exclusive release of directors' cuts on VOD*

The current proceeding of the film distribution system in Italy is one of the most visible manifestations of the transformation of the hierarchy between cinema and television. At first sight, this mechanism, created with the aim of protecting cinema, VOD and free-to-air television from the competition of adjacent markets, may seem neutral, since it allocates to each sector a time slot for the exclusive right to distribute a specific audiovisual content. However, the incompleteness of the current rules, the constant attempts to change them and the lack of sanctions for non-compliance are indicative of the growing importance of streaming and how the legislator is giving it more and more space at the expense of cinema.

We briefly go through the conventional distribution process. When a film is released, it usually follows a well-established process divided into several steps and concluded within a period of about one and a half to two years. In Italy, as in other countries, a movie is kept in the cinemas for as long as possible to maximise profits. First of all, there is what is known as the "periodo di sfruttamento esclusivo della sala" [period of exclusive use of the set] i.e. a time window defined by an *ad hoc* law[149], both in terms of timing and procedure, in order to safeguard the film market by ensuring that a given work can only be seen in cinemas.

At the end of this phase, the distribution procedure becomes less rigid. After theatrical release, unless there are specific agreements with a particular platform, the film is placed on online sites and made available for rental, as part of a larger catalogue (SVOD or AVOD) or as a single on sale content (TVOD). During this time, which usually lasts one year, but can vary depending on the commercial arrangements between the companies involved, it is guaranteed, as in the first step, that there will be no exploitation of the title on others distribution channels.

Later on, the distribution rights are sold to TV channels. The title is then inserted in the pay-TV schedules (Sky) and finally in the schedules of the free-to-air channels (Rai, Mediaset). At this stage, in order to prevent external competition, the film cannot be screened or rented and is therefore removed from both the cinema calendars and the online catalogues[150]. Once this cycle has been completed, the movie

[149] The duration of the "periodo di sfruttamento esclusivo della sala" is regulated by Legge 14 novembre 2016, n. 220 on the regulation of cinema and audiovisual. https://www.gazzettaufficiale.it/eli/id/2016/11/26/16G00233/sg (Last consultation on February 13, 2024).

[150] The rules concerning the distribution of movies, together with all the dynamics discussed in section 2.3, partly explain why streaming platforms' catalogues are constantly changing and why not all the titles are always available.

becomes a library title, which means that it is available for online rental as long as the organization that owns the production and/or distribution rights wishes[151].

Recently, changes occurred to the duration of the "periodo di sfruttamento esclusivo della sala", which have subsequently been revoked, confirming the intention to sideline cinema in favour of other economic interests.

In 2016, when the aforementioned law was enacted, cinema exhibitors initially enjoyed an exclusive right of 105 days for the works released in Italy. This protection during the pandemic was later reduced to one month, so that production companies could recover their invested capital as quickly as possible. This provision, which was supposed to be temporary and imposed by the state of emergency, was actually a concrete attempt of reform for the years to come. In fact, in 2022, when this particular scenario was over, the Minister of Culture of the time, Dario Franceschini, did not decide to return to the pre-Covid conditions, but rather issued a decree – "Salva sale" [theatre rescue] – setting the exclusive exploitation period at 90 days[152], which provoked many protests. The situation was not restored until 3 April 2023, when the *Tribunale Amministrativo Regionale* (TAR) of Lazio upheld the appeal of the cinema exhibitor MMRCinema S.r.l.[153].

Despite the TAR's action, there are still legal loopholes in the distribution system that could ultimately harm the film industry. For instance, if one or more streaming companies do not stand by the exclusive time slot that cinemas are entitled to, there would be no penalties or fines to pay. For example, Netflix, which, as part of its corporate policy, does not comply with the timing of distribution, either in Italy or in other countries, and announces its own films on its platform shortly after, at the same time or, in some cases, even earlier than the theatrical release, is not punished in

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151 "Cosa succede ai film dopo che sono passati al cinema", in *Il Post*, 2023, https://www.ilpost.it/2023/05/04/film-dopo-cinema-noleggio-streaming/ (Last consultation on February 13, 2024).

152 Magliaro, Alessandra, "Finestre a 90 giorni, accordo bipartisan salva-sale", in *Ansa.it*, 2022, https://www.ansa.it/sito/notizie/cultura/2022/07/13/finestre-a-90-giorni-accordo-bipartisan-salva-sale_1219d819-e76b-479f-bb92-94a65cfec002.html (Last consultation on February 13, 2024).

153 Capozzi, Fiorina, "Cinema, il Tar boccia l'ex ministro Franceschini e amplia l'esclusiva dei film in sala", in *Verità & Affari*, 2023, https://www.veritaeaffari.it/in-evidenza/cinema-il-tar-boccia-lex-ministro-franceschini-e-amplia-lesclusiva-dei-film-in-sala/ (Last consultation on February 13, 2024).

any way other than being denied access to public funding and competing for the awards of the Accademia del Cinema Italiano[154].

All these changes, which have involved all the major countries of the world, have led to a new power relationship between on-demand and cinema and to an enhancement of the appeal of the former to the expense of the latter[155]. The streaming companies, aware of their strength, have therefore begun to adopt behaviours to their advantage. Two of these are particularly noteworthy: limited distribution in cinemas and the increasingly frequent exclusive release of the extended version of a film on on-demand platforms.

With regard to the first phenomenon, in recent years some works produced by huge companies like Netflix, which are particularly relevant in terms of the expectations raised among audiences, budgets invested and quality of the cast, had a very limited theatrical distribution, both in terms of timing and the number of cinemas where a given film could be seen.

One of the most striking cases is undoubtedly *The Irishman* (Martin Scorsese, 2019), by Martin Scorsese with such stars as Al Pacino, Robert De Niro and Joe Pesci. Produced and distributed by Netflix, it has long been at the centre of a dispute involving not only the Los Gatos-based company and the world's major cinemas, but also Scorsese himself, who would have liked the movie to be distributed in as many cinemas as possible[156]. However, this did not happen: after a long period of negotiation, *The Irishman* was included in theatrical schedules for three weeks only[157], before being officially added to Netflix's catalogue.

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[154] It is noteworthy that, under special circumstances, *Sulla mia pelle* (Alessio Cremonini, 2018) and *È stata la mano di Dio* (Paolo Sorrentino, 2021), both films produced by Netflix, nevertheless managed to be protagonists at the David di Donatello awards ceremony, winning prizes in several categories. In the first case, the above-mentioned restrictions had not yet been made official; in the latter, they had been temporarily suspended due to Covid-19.

[155] All the consumption data analysed in sections 3.1 and 3.3 and some of the phenomena examined in this discussion, such as multi-homing and churning, are emblematic in this respect. Others, which are not mentioned, are nevertheless indicative of a major change in the media sector, such as the closure of video stores.

[156] Misciagna, Domenico, "Martin Scorsese vuole The Irishman in tutti i cinema: Netflix capitolerà?", in *Comingsoon.it*, 2019, https://www.comingsoon.it/cinema/news/martin-scorsese-vuole-the-irishman-in-tutti-i-cinema-netflix-capitolera/n87057/ (Last consultation on February 13, 2024).

[157] Distribution in Italian cinemas was even more limited than in America. The Irishman was only shown for three days, from 4 to 6 November, as an event film at the Cineteca di Bologna.

As for the exclusive release of directors' cuts, we can see how this trend has become a threat to the film world in the last few years. Originally, the use of VOD for directors' cuts represented an opportunity for both spectators and filmmakers: in *The House That Jack Built* (Lars Von Tier, 2018), streaming portals were used to present the original, uncensored version of the movie, which was considered too gory to be screened in theatres; with *Zack Snyder's Justice League* (Zack Snyder, 2021), the director had the chance to complete a film that he had to abandon after a serious family tragedy. The director's cuts of *Rebel Moon* (Zack Snyder, 2023) and *Napoleon* (Ridley Scott, 2023), on the other hand, were meant for a completely different purpose: both works consist of extended editions of the movies shown in cinemas. In each case, viewers could see additional scenes and insights into certain characters that they would never have the possibility to watch in the cinema, thus encouraging people to subscribe to a particular on-demand site or to avoid going to the cinema and wait for the full online version of the film.

3.4.2 *MUBI: an example of convergence between VOD and cinema*

It was mentioned the emblematic case of MUBI, perhaps one of the few policies for which simultaneously VOD has reduced cinema attendance and has also proved to be a great resource for the film industry. Thanks to their ability to attract a wide range of users, these platforms have also been a way of introducing the seventh art to as many people as possible. MUBI is certainly one of the clearest examples of how the encounter of non-linear television and cinema can have positive effects.

Initially known as The Auteurs, MUBI was founded in 2007 by Turkish-born entrepreneur Efe Çakarel, who came up with the idea of launching an on-demand platform when, after a long search, he could not find a portal that would allow him to watch *In the Mood for Love* (Wong Kar-wai, 2000)[158].

Lancelotti, Marica, "The Irishman al cinema in Italia dal 4 al 6 novembre", in *movieplayer.it*, 2019, https://movieplayer.it/news/the-irishman-cinema-italia-dal-4-al-6-novembre_71809/ (Last consultation on February 13, 2024).

[158] Stellino, Alessandro "MUBI: per il cinema d'autore il futuro è il VOD", in *Filmidee*, 2011, https://web.archive.org/web/20110831135511/http:/www.filmidee.it/article/65/article.aspx (Last consultation on February 13, 2024).

MUBI immediately established three main objectives: taking advantage of the ubiquity of VOD to promote cinema among the young; offering the public the best international auteur films, with a particular focus on those quality, non-mainstream productions that were only screened in a few cinemas; and creating a place where viewers living in different time zones or belonging to very different cultures could share their cinematic discoveries[159].

To achieve the first goal, MUBI has developed a tariff plan that is very distinctive from the traditional ones typical of the big players. While Netflix varies its monthly fees according to the services it provides[160], MUBI has designed special rates for students. From 2017 to 2020, the subscription was free for all cinema students, then it was decided to make it cheaper for all students, regardless of their faculty, the university where they are enrolled and their country of residence. From 2020, a 40% discount on the standard fee was applied, bringing the price down to €6.99 per month[161].

Besides setting up a tariff plan tailored to young people's financial means, MUBI also assembles its catalogue in accordance with the above-mentioned objectives, paying close attention to each choice. The films to be invested in are selected by an acquisition team that scours the world of cinema for new or recent works worthy of reaching a wider audience. Once one or more suitable titles are found, MUBI purchases the distribution rights from the owners, whether they are local distributors, international sales agents, or the filmmakers themselves.

As with any VOD platform, the interface is divided in multiple categories, within which the various content can be found. The most important are: "Double Bill", which proposes two works by the same director that share a common theme; "Viewfinder", for the most original and daring productions from all over the world;

[159] Cfr. Vision, https://mubi.com/it/vision (Last consultation on February 13, 2024).
[160] Netflix offers three different packages with three distinct prices depending on the presence or absence of advertising, the maximum number of devices supported simultaneously and the number of profiles that can be activated with the same account.
Cfr. Plans and Pricing, https://help.netflix.com/it/node/24926 (Last consultation on February 13, 2024).
[161] Cfr. Studenti, https://it.help.mubi.com/category/589-studenti (Last consultation on February 13, 2024).

"Rediscovered", which includes remakes or re-releases of great classics as well as lesser-known films; "Undiscovered", the section dedicated to experimental cinema.

The catalogue is constantly updated and is based on a daily rotation of titles. In particular, the proposal is based on the motto "a film every day for a month", which implies that a new entry is added every day, that each addition corresponds to a withdrawal, and that no movies are available for more than thirty days in total. However, there are exceptions to this rule, which constitute a further peculiarity of the platform: for very important film festivals, special partnerships are formed whereby certain films from a specific event are made accessible on the portal for the entire event. Alongside temporary acquisitions, there are also permanent titles that are grouped together in what is known as MUBI Library, a catalogue that gathers all the best works bought by the company, classified by theme or by auteur[162].

MUBI's business has grown considerably throughout the years. Today, Efe Çakarel's platform offers its services in 190 nations, and the firm has evolved from a simple distribution house, i.e. a business that merely employed VOD to make art-house films accessible to the general public, to a production company that has begun to participate economically in the creation of new works. Recently, MUBI has also collaborated with famous filmmakers, financing and distributing films that have participated in the world's most important film festivals. Among the most important recent investments are *Don't Expect Too Much from the End of the World* (Radu Jude, 2023), which was presented at the Locarno Film Festival[163], as well as *Priscilla* (Sofia Coppola, 2023), *Gasoline Rainbow* (Ross Brothers, 2023) and *Memory* (Michel Franco, 2023), all of which were part of the 80th Venice Film Festival[164].

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[162] Teneggi, Elisa, MUBI: Uno sguardo approfondito alla piattaforma streaming e ai suoi protagonisti, in *longtake*, 2020, https://www.longtake.it/news/mubi-library-charlie-kaufman-nicolas-winding-refn-francois-truffaut (Last consultation on February 13, 2024).

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[164] Ramachandran, Naman, "Sofia Coppola's 'Priscilla' Acquired by Mubi for International Distribution", in *Variety*, 2023, https://variety.com/2023/film/global/sofia-coppola-priscilla-mubi-1235701887/ (Last consultation on February 13, 2024).

Conclusion

Throughout this dissertation, the multiple structural changes in television schedules have been emphasised. Considering the programming schedules of 1954, which were extremely limited both in terms of genres and broadcasting hours, the evolution towards streaming platforms, with potentially infinite catalogues and content accessible at any time of the day, has proven to be a great achievement from a technological point of view and a symptom of the constant presence of TV as a medium in our lives.

This is particularly apparent the moment the invention of VOD enters the mediascape. Such a model illustrates the from a linear to a non-linear, complex TV. As it was seen in Chapter Three, non-linear television has been the driving force behind the economic recovery of the audiovisual sector after Covid-19, and has also been crucial in facilitating the country's technological development. However, while the emergence of on-demand has brought undeniable successes, it has also raised some potential problems and critical issues that could stimulate further reflection for the future.

First of all, it is worth asking whether streaming portals have really achieved the purpose for which they were created: overcoming the temporal and spatial constraints of linear television and giving the public greater freedom. While there are few doubts about the capacity of streaming platforms to break through these two limitations, as titles can be enjoyed on multiple devices and anytime, the issue of consumer freedom is still a matter of some perplexity, and the effective attainment of this goal is still widely debated.

This work has focused on the ideas of researchers such as Chuck Tryon and Annette Markham, who argue that this new model of television has given individuals only an apparent freedom of choice, cleverly disguised by the design and operation of the platforms. These opinions are also supported from a practical point of view. Today, a consumer does not really have the possibility of choosing what to watch with no restrictions, but he must adapt to what is available in the catalogue, and if he wants to enjoy any content that is not offered by a particular operator, he has to take out an additional subscription to another streaming service. This inevitably increases the costs for the audience, resulting in a sort of paradox: on one hand, the aim is to give people more freedom, but on the other one, by making it necessary to use several portals at the same time in order to get the most comprehensive service, the choice is restricted for all those groups who cannot afford to pay the fees for more than one on-demand service. Even in the search process itself, the user is not entirely independent. His choices are indeed determined by an algorithm that highlights some titles and hides others, according to current trends or to the user's viewing habits. In other words, with the current system, it is unlikely that someone will ever be fully aware of all the available titles on a platform, and thus of the actual depth of the pool from which he can draw. Moreover, the VOD subscriber, being constantly conditioned by the algorithm, may be less inclined to experiment with new genres and more likely to stick and delve deeper to what he already knows.

The emergence of on-demand also leads us to think about how the TV set will be used in the near future. According to data collected by Auditel and Censis, in 2023 the number of smart TVs in Italy exceeded the number of traditional TVs for the first time in history. At the moment, the overtaking is slight - 21 million against 20.5 million - but the trend is expected to continue, leading to total replacement, as happened in the past with cathode ray tube televisions.

As well as being able to connect to the Internet, the new TVs are on average bigger (around 50 inches) and can provide higher quality images thanks to a greater number of pixels. All of these features make Smart TVs the perfect tool for enjoying contents such as video games or titles from on-demand platforms, and suggest that in the future the TV screen could increasingly be used as a mere medium for projecting images and videos, rather than for accessing free-to-air channels. This new way of using television is not only something that could occur in the future, but can already be witnessed in the present: data from GfK Italia indicates that smart TVs are now the main medium through which consumers enjoy streaming titles, with a percentage of 68%.

The last consideration concerns cinema, one of the markets that suffered the consequences of the shift to non-linear more than any other. Nowadays, the balance of power between the major streaming giants and cinema exhibitors seems to be leaning heavily in favour of the former. Behaviours such as the limited distribution of movies in cinemas and the exclusive release of director's cuts on on-demand portals are becoming more common, and are undoubtedly inflicting great economic damage on the film industry. Conversely, the exclusion from public funding of companies that do not respect the "periodo di sfruttamento esclusivo della sala" or the prohibition of participation in the major festivals are not sufficient sanctions to reverse this trend.

If one adds to this scenario the growth of SVOD subscribers in the last few years, and the fact that the living rooms of Italians are turning into miniature cinemas thanks to the enormous technological developments in stereos and television screens, one cannot help but wonder what the fate of cinema will be. In particular, the question arises as to how often the masses will continue to go to the cinema, and to what extent watching a movie in the cinema rather than at home will continue to represent an added value.

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Bim Bum Bam (Id., various, Italia 1, 1981-2002)

Buongiorno Italia (Id., Fatma Ruffini, Aba Cercato, Giorgio Lazzarini, Canale 5, 1981-1984, 1987-1988)

Carosello (Id., various, Programma Nazionale, later Rete 1, 1957-1977)

Celebrity Hunted (Id., Alessio Pollacci, Prime Video, 2020-)

La domenica sportiva (Id., various, Rai 2, 1953-)

Lascia o raddoppia (Id., Romolo Siena, Programma Nazionale, 1955-1959)

LOL: Chi ride è fuori (Id., Hitoshi Matsumoto, Prime Video 2021-)

MasterChef (Id., Franc Roddam, Sky 2011-)

Pronto Raffaella? (Id., Gianni Boncompagni, Rai 1, 1983-1985)

Studio Aperto (Id., Emilio Fede, Cesara Buonamici, Italia 1, 1991-)

Viva RaiPlay! (Id., Fiorello, RaiPlay 2019-)

X Factor (Id., Simon Cowell, Sky 2008-)

II. TV series

Dallas (Id., David Jacobs, CBS, 1978-1991)

Dynasty (Id., Richard Shapiro, Esther Shapiro, ABC, 1981-1989)

Gomorra (Id., Roberto Saviano, Sky, 2014-2021)

House of Cards (Id., Beau Willimon, Netflix 2013-2018)

Liberi Tutti (Id., Giacomo Ciarrapico, Luca Vendruscolo, RaiPlay 2019)

Mare Fuori (Id., Cristiana Farina, RaiPlay 2020 -)

Non Uccidere (Id., Claudio Corbucci, Rai 2015-2018)

Orange is the New Black (Id., Jenji Kohan, Netflix 2013-2019)

Phillis (Id., Stan Daniels, Ed. Weinberger, CBS, 1975-1977)

Squid Game (Id., Hwang Dong-hyuk, Netflix 2021-)

Stranger Things (Id., Duffer Brothers, Netflix 2016-)

Suburra. La Serie (Id., Daniele Cesarano, Netflix 2017-2020)

The Young Pope (Id; Paolo Sorrentino, Sky, 2016)

True Detective (Id; Nic PIzzolatto, Now 2014-)

III. Movies

Blade Runner (Ridley Scott, 1982)

C'è ancora domani (Paola Cortellesi, 2023)

Don't Expect Too Much from the End of the World (Radu Jude, 2023)

È stata la mano di Dio (Paolo Sorrentino, 2021)

Gasoline Rainbow (Ross Brothers, 2023)

In the Mood for Love (Wong Kar-wai, 2000)

La dolce vita (Federico Fellini, 1960)

La Grande Bellezza (Paolo Sorrentino, 2013)

La vita è bella (Roberto Benigni, 1997)

Memory (Michel Franco, 2023)

Napoleon (Ridley Scott, 2023)

Notte Prima degli Esami (Fausto Brizzi, 2006)

Per un pugno di dollari (Sergio Leone, 1964)

Priscilla (Sofia Coppola, 2023)

Rebel Moon (Zack Snyder, 2023)

Sulla mia pelle (Alessio Cremonini, 2018)

The House That Jack Built (Lars Von Tier, 2018)

The Irishman (Martin Scorsese, 2019)

Zack Snyder's Justice League (Zack Snyder, 2021)