



COMUNICAÇÃO E SOCIEDADE

40

HEALTH COMMUNICATION DURING A PANDEMIC

COMUNICAR EM SAÚDE EM TEMPOS DE PANDEMIA

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CONTENTS | SUMÁRIO

Health Communication During a Pandemic: What Is Our Role as Communication Scholars? Introductory Note	7
<i>Comunicar em Saúde em Tempos de Pandemia: Qual o Nosso Papel Enquanto Académicos de Comunicação? Nota Introdutória</i> Felisbela Lopes, Rita Araújo & Peter Schulz	
<hr/>	
THEMATIC ARTICLES ARTIGOS TEMÁTICOS	15
<hr/>	
Covid-19: A Pandemic Managed by Official Sources Through Political Communication	17
<i>Covid-19: Uma Pandemia Gerida Pelas Fontes Oficiais Através de uma Comunicação Política</i> Felisbela Lopes, Rita Araújo & Olga Magalhães	
<hr/>	
Prime Time Television News and Communication Strategies in Pandemic Times	33
<i>Informação Televisiva de Prime Time e Estratégias de Comunicação em Tempo de Pandemia</i> Isabel Ferin Cunha, Carla Martins & Ana Cabrera	
<hr/>	
The Impact of Covid-19 on Journalism: A Set of Transformations in Five Domains	53
<i>O Impacto da Covid-19 no Jornalismo: Um Conjunto de Transformações em Cinco Domínios</i> Andreu Casero-Ripollés	
<hr/>	
With the Newsroom at Home: Routines and Tensions of Women Journalists in Times of Covid-19	71
<i>Com a Redação em Casa: Rotinas e Tensões de Mulheres Jornalistas em Tempos de Covid-19</i> Gladys Adriana Espinel-Rubio, Raúl Prada-Núñez, Kelly Giovanna Muñoz Balcázar & César Augusto Hernández Suárez	
<hr/>	
Potentialities of Podcasting in Health Journalism — An Analysis of Three Podcasts About Covid-19 in Portugal	91
<i>Potencialidades do Podcasting no Jornalismo de Saúde — Uma Análise a Três Podcasts Sobre a Covid-19 em Portugal</i> Luís Bonixe	
<hr/>	
The Controversy in Media Health Coverage: The Stayaway Covid Application and Information Sources	109
<i>A Controvérsia na Cobertura Mediática de Saúde: A Aplicação Stayaway Covid e as Fontes de Informação</i> Sandra Pinto, Eunice Oliveira & Elsa Costa e Silva	
<hr/>	
Conspiracy Theories in Times of the Covid-19 Pandemic: Populism, Social Media and Misinformation	129
<i>Teorias da Conspiração em Tempos de Pandemia Covid-19: Populismo, Media Sociais e Desinformação</i> Gil Baptista Ferreira	
<hr/>	
Critical Review: A Review of the Studies About the Usage of Social Media During the Covid-19 Pandemic	149
<i>Revisão Crítica: Uma Abordagem aos Estudos Sobre o Uso dos Media Sociais Durante a Pandemia Covid-19</i> Cheng Cheng & Rita Espanha	
<hr/>	
Who Do the Portuguese Trust? Government Communication Management in the Covid-19 Pandemic	169
<i>Em Quem Confiam os Portugueses? A Gestão da Comunicação Governamental na Pandemia Covid-19</i> Gisela Gonçalves, Valeriano Piñeiro-Naval & Bianca Persici Toniolo	
<hr/>	
Health Communication in Times of Pandemic: The Perspective of Portuguese National Health Service Users	189
<i>Comunicação Para a Saúde em Tempos de Pandemia: A Perspetiva dos Utentes do Serviço Nacional de Saúde</i> Andreia Garcia & Mafalda Eiró-Gomes	

Classical Rhetoric and Storytelling in Advertising Praxis

207

Retórica Clássica e Storytelling na Praxis Publicitária

Jorge Veríssimo

Key Challenges and Recommendations to Provide Europe With a Film-Subtitling Protocol in the Digital Era Through Three Case Studies

225

Desafios e Recomendações Para Dotar a Europa de um Protocolo de Legendagem de Filmes na Era Digital Através Três Estudos de Caso

Enrique Castelló-Mayo, Margarita Ledo-Andión, Antía López-Gómez & Silvia Roca Baamonde

The Invisible Implications of Techno-Optimism of Electronic Monitoring in Portugal

247

As Implicações Invisibilizadas do Tecno-Otimismo da Vigilância Eletrónica em Portugal

Rafaela Granja



HEALTH COMMUNICATION DURING A PANDEMIC: WHAT IS OUR ROLE AS COMMUNICATION SCHOLARS? INTRODUCTORY NOTE

COMUNICAR EM SAÚDE EM TEMPOS DE PANDEMIA: QUAL O NOSSO PAPEL ENQUANTO ACADÉMICOS DE COMUNICAÇÃO? NOTA INTRODUTÓRIA

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When something happens that is truly unusual and gets widespread attention in a collective of human beings either because the population demand it or the powerful think it is in their interest that the population knows, we are faced with a situation that allows communication researchers and laypersons to study communication at work, directly, immediate, proximal, and one's own concerns still fresh. Only the unusual events might come between the researcher and her object. If the event is joyful, elation might occupy observers' hearts and minds. If the event is a threat, fears might distract the observer from observing. If a country is locked down, most everyday tasks in managing one's life get more difficult and consume more time.

A time will come, though, when the event will no longer preoccupy our lives, and we will start to wonder, *how did all this happen? And why? And what will the consequences be?* That time is long passed by for the covid-19 pandemic as many of us will turn to their favorite theories and try to explain, with the instruments these theories offer, why and how the pandemic materialized and developed. One can only hope that this enterprise will succeed as often as possible, and we formulate this:

thesis 1: it is our task to find out what we can learn from the covid-19 pandemic about communication.

Communication is in good hands as communication researchers understand more and more of it. Tradition has it that the treatment of communication subjects in the work of other disciplines is often shallow and lacking insight into the newest findings from communication research proper (Hannawa et al., 2014). Or so some of us (communication researchers) think. Irrespective of where the truth lies in this matter, it might be helpful for research not to start with theories from our own field of communication but from

the striking characteristics of the event and then try to uncover why and how they could develop. This order of thinking can be pursued by researchers of communication as well as those from other disciplines involved in the covid-19 complex. These include medical researchers from some disciplines, epidemiologists, virologists, political science, transportation experts, economists, lawyers.

Even the earliest rumors about a new infectious disease of the respiratory system, virulent in the province of Wuhan in China, came escorted by critique of communication behaviors. As early as a few months after the virus had secured a hold on the Western world, the term of an infodemic gained currency. Its prime address was the World Health Organisation, but soon there was criticism of the communication behaviors of more or less everybody who joined in the chorus of demands, reports, appeals, and defenses. Much of the criticism was Pavlovian, but to a large degree understandable, given the images of hospitals on the verge of breakdown under the burden of covid-19 patients challenging the capacity of healthcare institutions in wealthy countries of the world. The pace the virus took in its foray across the globe contributed to a critical tone in the coverage of the pandemic. The promises of such thinking are formulated as:

thesis 2: starting from special features of the pandemic and searching causes for them is a promising approach.

When lives are at stake and tremendous pressure to act is exerted on the political system, criticism in communication channels is nothing unusual, not in the channels of traditional mass media, nor in the communicative space that has come to be called social media. Criticism is not a bad thing as such, but it can become dysfunctional if it is based on erroneous information. We will come back to this, but first, ask what the special features are that studies could use as the starting point of inquiry.

The covid-19 pandemic was a first. Nothing like that has ever occurred. Of course, this assertion is not meant to deny that other infectious diseases in earlier days happened; just think of the so-called Spanish flu of the first winter after the end of World War I or the black death of 1347 and the following years. We do not want to open the discussion, where and how these cases differed from one another or what the similarities or differences were in medical terms. What made covid-19 different is the way communication devices were used and became part of the event itself, the pandemic, and the attempt to contain it. The 1918/19 influenza happened in a world that just then adopted the radio as the latest media information innovation, and television still had 25 years before it left a mark. And the black death swept over Europe 250 years before the first newspapers.

Five or six communication revolutions later, digital communication devices became part of the story. Daily reporting of indicators of social severity of the disease gave people a device to judge the pandemic's progress and later its retreat and return. People awaited numbers the relevance or the computation of which they may have had trouble to explain. On top of this, people were bothered with debates on which indicator was the best one to base political decisions on. The daily report on the progress of the pandemic reminded some of a patient in surgery who watched his own operation on a magnetic resonance imaging machine.

A quite different feature was pictures, mainly those that illustrated the capacity problems of the healthcare system. Pictures of current events used to be something you remember having seen on yesterday's television news, with hardly a chance to see it again. Today, with easy access to the internet, they have become something to google in your coffee break whenever you want to look at it again.

A communication exchange between a patient (information seeker) and a provider might end in a state that is worse than before. Think of a personal narrative of how a change in medication helped you tremendously. You post it on a social support website, where it is picked up by a seeker, who takes it for advice and spends time and energy trying to get a prescription. Doctors will not give it to you because they know better. Your frustration grows. The example leads to a state that is, in total, worse than before, and all three actors might have contributed to that: the doctor might not have done his best in explaining to you why the medication was not suited for you, thus creating more frustration than necessary. The poster could have been clearer about the personal nature of what he was to report. Something like a warning label of self might have impeded the misunderstanding. And you yourself revealed your low capacity for reading and interpreting the giver's tale. A similar example could be constructed with a message warning of a certain treatment and a miscomprehending seeker reading that as a recommendation.

Presumably, there are more ways that health communication is deeply affected by the potentialities of the internet. Think, for instance, of the ways the creators and advocates of conspiracy narratives could organize their followers and their strange worldview with the help of the world wide web. But we need not aspire to comprehensiveness here when the message is clear:

thesis 3: largely due to the existence of the internet, the covid-19 pandemic was the first of its kind.

We mentioned the presence of criticism already but stated that criticism as such is not problematic unless it is based on error. If we take communication seriously, as researchers and as participants alike, we have to insist that what is communicated is correct. As simple as this sounds, this demand is not only difficult to sustain, it is close to impossible to know when the truth is communicated and when it is not. Some pragmatic considerations might help.

Let us ask: how is untruth communicated? We do not mean the technical side, for which the answer would be: same as truths. There are some typical patterns that ease the spread of untruths and still allow the communicator to get away with it or avoid losing their credibility. Think of a scientific error that has not survived empirical testing, but not all colleagues have recognized that. One of this school of thinking advocates, in a public lecture, the error as a truth (which makes up an untruth), while a colleague on the next day contradicts (a truth). A reporter accurately writes two news stories about the two lectures, and another day later, another newspaperman files a story of scientific controversy,

depicting both camps in their best (or worst) light and following the papers maxim not to take sides in scientific controversies the author is not expert enough to judge by herself. As seen from a journalist's perspective, the two stories by the reporter are similar achievements as he did justice to both events. Common sense, however, would hold that the reporter told an untruth on the first day and a truth on the second. Of course, many journalists would take issue with finding the first story an achievement, holding that a writer has to be careful and truthful, and somebody who meets these ideals would have found the dubious nature of the first scientist's position.

The simple example presents a simple situation that can already demonstrate that the categories of truth and untruth can be difficult to assign. And the mix of forces that create untruths is, in any case, more complex than the probably most popular concept of media criticism: fake news. The term was, of course, coined by U.S. President Donald Trump before covid-19 came. What he meant is fairly easy to grasp: fake news is news he did not like. Such a subjective and unsupported concept discredits the serious and utterly necessary institution of media criticism because it reduces the criticism to an expression of a political opinion, invented by someone who would have been situated on the right-wing fringe of the major party in the US. The dubious origin of the term makes us plead for not using this term for a scientific approach that puts the achievement of the mass media on the discursive agenda.

The mismatch of elements in media coverage and effects indicates more than untruths; they hint at a form of system failure. Examples are ways of news reporting that are almost coercively understood as carrying the message that the corresponding events are becoming more frequent. The classic study is by Mark Fishman (1981) and deals with an alleged increase in crimes against the elderly, of which the crime statistics did not know anything, while the media put the subject on the agenda, and the people perceived an increase that did not exist. A variant of this is Mazur's (2004) hypothesis that people understand rising coverage of technologies as an indicator of a coming threat and become skeptical of the technology. This means that coverage alone can alter sentiments or opinions. The summary is this:

thesis 4: there are many ways not to tell the truth.

The newspaperman is writing the story of the controversy in the example sketched above. This part of the story hints at an input on news products coming not from the narrated materials but from the apparatuses that produce them. The demanded balance of the story does not depict any quality of events but a condition of the institution that produces news content. Whether and how something like this happens is also to be found for digital media in a situation of threat.

If we go back to media communication, we are often faced with an inclination of mass media to continue narratives that already exist. This appears to happen for other participants than the media. Most salient may well be the way the opponents of vaccination gained new strength. The fact is interesting enough to formulate it at once:

thesis 5: the covid-19 pandemic re-vitalized the traditional enmity of a section of the population towards vaccination.

Astonishingly, this could be observed in many different countries, and it is similarly confusing in all of them. Medical science and majorities of the population know for sure that vaccination is an efficacious, affordable, and largely safe device against becoming infected, and if infection occurs, a means to softening the course of the disease. It is utterly beneficial, and yet large sections of the population do not want it. The development was preceded by the continuing debate about wearing breathing masks. The discussion of vaccination, moreover, turns an old perception upside down: we were used to allegations that the powerful and the elites do not take the threats serious that normal people are exposed to in areas such as environment, food safety, on the job, and other. The new allegation is that elites invent threats in order to alienate people's attention from their actual lives.

Remains the “globality” of the pandemic. We have a large share of the planet's human inhabitants facing a biologically similar situation, to which many different reactions were possible. The coming of the virus is an example of what was called “the event as event”. Its opponents are the cultural, political, economic, and communicational forces to be scrutinized for causes and consequences as “event as news”. Such comparisons have proven to make excellent communication studies. If we do like our forebears did, the opportunities appear to be endless.

There are countless possible discussions related to the spreading of SARS-CoV-2. This issue is dedicated to “Health Communication During a Pandemic” and presents texts that offer us a systemic vision of Communication and Journalism during the pandemic, namely in the first year of SARS-CoV-2. We will organize this thematic issue into four parts.

The first part is strictly dedicated to Journalism and begins with an article signed by a research team (Felisbela Lopes, Rita Araújo, and Olga Magalhães) who portrays the news coverage of covid-19 through the analysis of the Portuguese press. Based on an extensive quantitative analysis of news texts, researchers seek to identify the most quoted news sources. Isabel Ferin Cunha, Carla Martins, and Ana Cabrera also chose Portugal as their research field, and they analyzed the communication strategies used by the Portuguese government in crisis management, discussing its reproductions on the television news coverage through an empirical study focused on the three first months of this virus' dissemination. The following article is signed by Andreu Casero-Ripollés, who names the main changes promoted by covid-19 in the journalistic field in Spain. He highlights five areas: news consumption, business models, working conditions, misinformation, and relationships with political actors. The first part is complete with a text by Gladys Adriana Espinel-Rubio, Raúl Prada-Núñez, Kelly Giovanna Muñoz Balcázar and César Augusto Hernández Suárez, who write about the routines and work practices of journalist women in Colombia and Venezuela during the health emergency context caused by covid-19.

In the second part, we highlight the role of technologies in constructing information and their impact on the public media space. Luís Bonixe chooses three podcasts that represent different models by media companies: one is produced by the public service radio (Antena 1), another one by an entertainment radio (Rádio Comercial), and the last one is produced by a digital medium that has its own radio (*Observador*). The researcher thinks of the importance of this new tool to health journalism since its role in covid-19 information is undeniable. Sandra Pinto, Eunice Oliveira, and Elsa Costa e Silva focus their research on the Stayaway Covid app. They analyze a sample composed of 182 news items published in the press, radio, and television, within which they identify news sources and conclude that politicians assumed a leading role in the consolidation of the dispute in this public health controversy, especially when it comes to the intention of making the app mandatory.

The third part deals with social media. By claiming that social media platforms are huge vehicles of health misinformation, Gil Ferreira built a questionnaire in order to identify antecedents and prerequisites for the belief in misinformation, reaching the conclusion that individuals with populist feelings have lower trust in institutional strategies to fight the pandemic, they privilege social media as a source of information. They show a greater acceptance of conspiracy theories on the disease. Cheng Cheng and Rita Espanha present a critical literature review on social media and covid-19, underlining relevant communication strategies and problematizing effects of what is published. Social media may be promoters of covid-19 related information and preventive health behaviors, even though there is a widespread discussion on the exposure to online content and mental health.

We close this theme issue with two articles centered on strategic communication. Based in Portugal, Gisela Gonçalves, Valeriano Piñeiro-Naval, and Bianca Persici Toniolo analyze government communication during the beginning of the second wave of covid-19. They assume that the (un)fulfillment of authorities' recommendations is directly associated with trust in news sources. Their work is partly grounded in an online questionnaire survey developed within an international research from European Public Relations Education and Research Association *Com-Covid* network. Andreia Garcia and Mafalda Eiró-Gomes focus on health users, and they seek to understand the health center clusters and institutions in charge of primary health care involvement in health communication related to covid-19.

The Varia section includes three articles. Jorge Veríssimo, professor at ESchool of Communications and Media Studies of Politécnico de Lisboa, shares his reflections on the extension of advertising strategy to storytelling. In his article, he highlights the communicational wealth of this narrative process on the persuasive message of advertising. Simultaneously, the author discusses the evidence of *pathos* and *ethos* in brand communication, asserting the roots of contemporary advertising in classical rhetoric. Based on three language contexts, Enrique Castelló-Mayo, Margarita Ledo-Andión, Antía López-Gómez, and Silvia Roca Baamonde explore the relationship between the normalization

process of European minority languages and the practice of subtitling films. The researchers from the University of Santiago de Compostela argue that the screening of subtitled original versions safeguards the originality of the audiovisual work and promotes linguistic diversity, with significantly lower costs than the dubbing process. Drawing on several authors who have discussed control systems, the prison context, and security issues, Rafaela Granja unveils “The Invisible Implications of Techno-Optimism of Electronic Monitoring in Portugal”. The Communication and Society Research Centre researcher argues that the discourses disseminated by official institutions, the media, and the surveillance industry promote a technological optimism that narrows the public debate on the reform of justice and the penal system instead of promoting dialogue on these phenomena’s social and cultural roots.

Back to SARS-CoV-2: it is undeniable that in a global world, disease knows no geographical boundaries and that communication and, by extension, journalism are central elements in fighting a pandemic. Hence they deserve deep and continuous discussions. This journal’s issue represents a contribution from the academic community to that important path, and it collects researches from different countries and settings, a much-needed practice in the field of health communication (Hannawa et al., 2014).

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THEMATIC ARTICLES | ARTIGOS TEMÁTICOS 

COVID-19: A PANDEMIC MANAGED BY OFFICIAL SOURCES THROUGH POLITICAL COMMUNICATION

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ABSTRACT

SARS-CoV-2 pandemic attracted a wide range of expert sources into journalism, especially those from the health field. Nonetheless, official sources (mainly politicians) did not become less visible. They were mainly decision-makers, even though decisions were not always well-communicated, which promoted entropy. Worldwide, countries adopted different strategies, some undergoing severe lockdowns and others rejecting restrictive measures — and that was often difficult to understand. The management of this pandemic was hard, not only due to the lack of technical knowledge but also due to the lack of cooperation and coordination amongst several stakeholders, such as governments, health authorities, or experts. In this research, we seek to understand the role of official sources in the Portuguese press during the emergency states. In order to do so, we analyzed two national newspapers, a reference newspaper (*Público*) and a mainstream newspaper (*Jornal de Notícias*) from March 18 to May 2, 2020, and from November 9 to December 23, 2020. Our corpus comprises 2.307 news pieces: 1.850 were published during the first emergency state, quoting 4.048 news sources, and 457 were published during the second emergency state, with 857 sources. We realized that official news sources are highly visible in the news, especially those from the government, such as the prime minister and a few other ministers. Although evidence recommends the appointment of an official spokesperson, that did not happen in Portugal, and it may have contributed to some lapses throughout 2020. By the end of the year, the country had an increase in covid-19 cases, and the hesitancy that characterized political decisions was also behind that.

KEYWORDS

covid-19, journalism, official news sources, health communication

COVID-19: UMA PANDEMIA GERIDA PELAS FONTES OFICIAIS ATRAVÉS DE UMA COMUNICAÇÃO POLÍTICA

RESUMO

A pandemia causada pelo vírus SARS-CoV-2 trouxe para o campo jornalístico um conjunto alargado de especialistas, principalmente da área da saúde. No entanto, as fontes oficiais,

sobretudo políticas, não perderam espaço. A elas ficou reservado o papel de decisores, mas isso nem sempre foi comunicado da melhor forma, criando-se com regularidade entropias de vária ordem. Por exemplo, por vezes não se tornou claro por que é que alguns países adotaram confinamentos severos enquanto outros rejeitaram medidas restritivas. A resposta a esta pandemia foi sempre difícil. Acima de tudo, porque o conhecimento era escasso, mas muitas vezes porque não havia cooperação e coordenação entre vários agentes, entre eles os governos, autoridades de saúde ou especialistas. Neste trabalho, procuramos saber qual o lugar das fontes oficiais na imprensa portuguesa durante os estados de emergência. Para isso, analisámos dois jornais, um de referência (*Público*), outro de linha popular (*Jornal de Notícias*), de 18 de março a 2 de maio de 2020 e de 9 de novembro a 23 de dezembro de 2020. O nosso corpus de análise é composto por 2.307 textos noticiosos: 1.850 textos foram publicados durante a primeira fase de emergência nacional, citando 4.048 fontes; e 457 foram publicados na segunda fase, apresentando a citação de 857 fontes. Como conclusões, constatamos uma grande visibilidade das fontes oficiais, particularmente do governo, sobressaindo aí o primeiro-ministro e um conjunto restrito de outros ministros. Não há propriamente ninguém que assuma o papel de porta-voz oficial daquilo que vai acontecendo, ao contrário do que é recomendado na literatura, e isso foi provocando alguns deslizes na comunicação ao longo de 2020, verificando-se no final desse ano uma subida de casos, resultante também de algumas hesitações ao nível das decisões.

PALAVRAS-CHAVE

covid-19, jornalismo, fontes oficiais de informação, comunicação de saúde

1. INTRODUCTION

After some hesitation, on March 11, 2020, the World Health Organization declared covid-19 a pandemic. By then, the new coronavirus had infected more than 118,000 people in 114 countries and caused 4291 deaths. The first death from SARS-CoV-2 occurred in China on January 10, 2020. On January 24, 2020, the coronavirus reached Europe. Portugal reported the first two people infected on March 2, 2020. On March 12, 2020, the Portuguese government announced that, in 4 days, it would suspend face-to-face activities from nurseries to higher education, limit access to shopping centers and public services, reduce the occupancy of restaurants, close bars and ban visits to nursing homes. Later that day, the prime minister stated in a press conference that this was a “struggle for survival and to protect the lives of the Portuguese” (Mendes, 2020, para. 4). On March 14, the weekly newspaper *Sol* chose for its headline a phrase that was beginning to circulate in the public space: “stay at home”. The headline quickly became a hashtag that the media would constantly replicate: in the top corner of television screens, on their websites, on newspaper pages, in radio line-ups. On March 18, the president of the republic decreed a state of emergency for 15 days, renewed on April 2 and 17. Until May 2, the country lived in confinement, always reported by the news media, which directed citizens to preventive behavior against the disease, seeking to act as a front to fight the pandemic. The state of emergency would resume on November 9, 2020. The speed of the virus intensified, the newsworthiness decreased. However, throughout the year, journalism was always giving great prominence to the pandemic, changing themes, sources,

focus, work rhythms, access channels to information sources. However, a variable has remained constant: the importance of official sources, particularly the political ones and, within these, the government.

This paper analyzes how official sources were portrayed by the Portuguese press during the states of emergency decreed in 2020. To do so, we analyzed two newspapers, a reference newspaper (*Público*) and a mainstream newspaper (*Jornal de Notícias*) from March 18 to May 2, 2020, and from November 9 to December 23, 2020. The purpose is to know which sources spoke the most and what topics required this type of sources the most. Therefore, we have established a corpus of analysis of 2,307 news texts: 1,850 published during the first stage of national emergency, quoting 4,048 sources, and 457 published during the second stage, incorporating 857 sources.

2. THEORETICAL FRAMEWORK

2.1. THE IMPORTANCE OF HEALTH COMMUNICATION IN PANDEMIC CONTEXTS

In the context of a public health emergency, the emergence of new risks for populations generates high levels of uncertainty (Reynolds & Seeger, 2005, p. 44). In these circumstances, communication inevitably takes on an enormous centrality. Several authors acknowledge the importance of health communication as an indispensable weapon in fighting against the covid-19 pandemic (Fielding, 2020; Finset et al., 2020). Indeed, the pandemic caused by the SARS-CoV-2 virus has seriously tested political leaders' leadership and communication skills worldwide (McGuire et al., 2020, p. 361). Political and health authorities have often failed to communicate decisions effectively. The disparity of responses at the political level, as a whole, is one of the factors that, admittedly, can raise uncertainty among the population. In effect, "uncertainty in the face of health threats scares people, and novel threats such as covid-19 maximize the perception of uncertainty in several ways" (Dunwoody, 2020, p. 472). In this sense, it has not always been clear why certain countries have adopted very strict confinements while others have been reluctant to impose restrictive measures — and this lack of clarity has often been due to communication problems. Don Nutbeam (2020) even acknowledges that "these are challenging times to be in government" (para. 1). "Many governments stuttered at the start of the pandemic, and were slow to provide clarity and certainty. When clarity and consistency of message was missing, people turned to alternative sources of information in the mainstream and digital media" (Nutbeam, 2020, para. 2).

New Zealand is considered a global success story in covid-19 management, and communication skills are an essential aspect of New Zealand's political leadership (McGuire et al., 2020). "Guiding an effective response to the global pandemic has required leaders to demonstrate not only effective planning and coordination skills, but the ability to communicate clear consistent messages in an empathetic manner as well" (McGuire et al., 2020, p. 361). In addition to communication skills, the response to the pandemic was also largely dependent on "public trust in government information and

unprecedented compliance with advice” that dictated the need for personal distancing and hand hygiene (Nutbeam, 2020, para. 1). The effective promotion of covid-19 preventive behaviors relies heavily on communication with the public. It is necessary to communicate what to do and why — and messages should be based on fundamental principles such as clarity, honesty, consistency, and repetition (Finset et al., 2020; Noar & Austin, 2020; Vraga & Jacobsen, 2020), and delivered by credible, non-political sources (Noar & Austin, 2020). Communication to the public must be constantly updated. If there is no new information, the opportunity should be taken to recall what is already known (Ratzan, Gostin, et al., 2020), namely the importance of maintaining a safe distance, breathing etiquette, and mask use where appropriate. Health authorities must recognize the temporality of the messages they convey since, given the rapid evolution of the pandemic, what is true today may not be true tomorrow (Finset et al., 2020). Health authorities should acknowledge this uncertainty about the virus and provide information based on the most up-to-date scientific evidence. That is because hope-based rather than fact-based communication leads to “confusion” and “mistrust” in institutions (Fielding, 2020). In addition to safeguarding these aspects, the number of spokespersons should also be limited and consistent (Finset et al., 2020). “Having a clear voice within government helps avoid a ‘talking heads’ dynamic that undermines the development of a cohesive strategy” (Ratzan, Sommarivac, & Rauh, 2020, para. 10). When countries did not choose a spokesperson, the media and the public itself took care of that (Ratzan, Sommarivac, & Rauh, 2020). Indeed, “the way that officials, leaders, and experts talk with the public during this crisis matters because it could mean the difference between life and death”, as communicational differences between politicians and scientists often result in contradictory, confusing messages and dangerous behavior (Fielding, 2020, para. 1).

That said, political leaders and health experts are more responsible for providing accurate information and implementing measures promoting behavior change (Finset et al., 2020). The response to this pandemic requires cooperation and coordination among various actors, including governments, media, technology platforms, and the private sector (Ratzan, Gostin, et al., 2020).

Maintaining the fragile consensus between governments, their scientific advisers, and their citizens is critical to the successful control of the epidemic. This consensus will be sustained by mutual trust built on effective communication – between scientists and policy makers, and between governments and their populations. (Nutbeam, 2020, para. 6)

2.2. WHEN OFFICIAL SOURCES DO POLITICAL COMMUNICATION AND NOT HEALTH COMMUNICATION

The covid-19 pandemic has shaken the reliability of the *modus operandi* of communication management from official sources. Health communication must address many particular traits to be effective (Finset et al., 2020; Noar & Austin, 2020; Vraga

& Jacobsen, 2020). This reality becomes more acute when we face a scenario of risk and uncertainty, like the one we have been experiencing since the beginning of 2020 (World Health Organization, 2020). In other words, governments and health authorities should have used the most modern state of the art in health communication and even risk communication in the current framework (Araújo, 2020). However, in this regard, official sources may have failed. Not because they failed to provide the public with the information needed to modulate their behavior to prevent the disease, but because they did not abandon the communicative dynamics typical of political communication, which undermined some of the communication efforts undertaken by creating unnecessary entropies (Martins, 2020).

Official sources tend to dominate the public space through their influence on newsrooms (Araújo, 2017; Fernández-Sande et al., 2020; Gans, 1979/2004; F. Lopes et al., 2011; Magalhães, 2012; Ribeiro, 2006; R. Santos, 1997). Because of its communicative proactivity and the circumstances that shape — and often restrain — journalistic work (Fernández-Sande et al., 2020; Reich, 2011; Van Hout et al., 2011). The value of that hegemony is incalculable. Whoever speaks in the news space defines what reaches society and influences how public opinion interprets information (Fernández-Sande et al., 2020). Hence, it is easy to infer the strategic value arising from the occupation of the media space by political agents, who have been monetizing this reality for decades, creating a “closed circle” between themselves and journalists that silences broad sectors of society (Pérez Curiel et al., 2015).

However, the pandemic challenged the status quo. The reality that has hit the world in 2020 does not match the usual political rhetoric, often empty of content. Journalists have exerted enormous pressure in a relentless search for answers, and official sources have not always been able to respond in the best way to successive requests. This is because the temptation to maintain a political communication logic was strong. Official sources did not know how to share the stage with the experts, naming one as the spokesperson. The daily two-headed press conferences, attended by the director-general of health and the minister of health, were political moments. And even the frequent meetings with the experts (known in the media as “Infarmed meetings”) have relegated scientists to the role of technical information presenters, without a more active — or at least closer — participation in political decision-making, with an exception only in the second confinement plan, initiated in stages from March 15, 2021 (Anjos, 2021; Monteiro, 2021). At the end of the meetings, the political forces were listened to by the media, which lined up in front of the microphones, following their traditional practices carried over from parliament, and replicated pre-packaged political speeches.

Against this background, and in light of the political objectives that traditionally dictate the government-related official sources’ communication strategies, one can see that the pandemic represented an outstanding risk at the beginning of 2020. However, it was also an excellent opportunity to strengthen the reputation of a minority government, whose stability in power depends on the prime minister’s political skill, the position of

the left-wing parties in parliament, and friendly relations with the president of the republic. In addition, the “micro agendas” of different official sources were still evident, which tried to gain the most advantageous possible media positioning at each moment of the pandemic. The problem is that, in trying to capitalize politically on gains in the war against covid-19, official sources have contaminated the public debate around the pandemic. If they have managed to reap political dividends (SIC Notícias, 2020), at times, they have been easy targets at other times (P. Santos, 2020). Moreover, in the process, communication has lost quality.

3. EMPIRICAL STUDY

3.1. METHODOLOGICAL PATHS

“In this pandemic time, which summons specialized knowledge, what place did official sources hold in the Portuguese press?” That initial concern motivated this research, which is part of a broader project that seeks to determine how the generalist news media in Portugal covered the covid-19 pandemic. To address this objective, we conducted a quantitative analysis of the news about covid-19 published in two national daily newspapers, a reference newspaper (*Público*) and a popular line newspaper (*Jornal de Notícias*). We chose two specific periods: March 18 to May 2, 2020, and November 9 to December 23, 2020. Those dates are related to periods when Portugal has declared a state of emergency during the year 2020. The digital print versions of the newspapers were used to collect the data. When selecting cases, we considered all the news texts published in the newspaper sections entitled “Primeiro Plano” (Forefront; *Jornal de Notícias*) and “Destaque Covid-19” (Covid-19 highlight; *Público*). According to a previously developed and tested analysis grid, the collected data were processed, coded, and categorized using the statistical analysis program SPSS Statistics.

Focusing our work on information sources, we tried to analyze which type of source journalists use the most; their status and the institution they work for; where they speak from; and their medical specialty, if any. Our analysis corpus consists of 2,307 news texts: 1,850 texts published during the first phase of the national emergency, citing 4,048 sources, and 457 published during the second phase, quoting 857 sources.

This work is part of a broader project that addresses the media coverage of the covid-19 pandemic in the Portuguese press, continuously analyzing the daily newspapers during the states of emergency and trying to find out, through surveys, the perceptions of Portuguese journalists regarding the work developed (F. Lopes et al., 2020).

3.2. OUTCOMES AND DISCUSSION

Although professional sources, particularly experts, gained high visibility in the media coverage of the SARS-CoV-2 virus (accounting for more than 30% during the two analyzed periods), official sources were also privileged (26% in both periods). They were

more connected to decision processes that proved to be structural in managing the SARS-CoV-2 evolution. When we add official documents (decree-laws, health authority reports, etc.) to the official human sources, the frequency increases to 33.1% in the first wave and 31.3% in the second wave, thus surpassing the influence of specialists in the news texts through this period (33.1% during the first wave and 30.5% in the second wave). We are talking essentially about interlocutors linked to political decision-making centers and power elites, with the government standing out in this group, especially the prime minister, who has taken it upon himself to communicate the most critical measures in managing this pandemic. As shown in Table 1, there is a fair diversity of information sources, although this conjuncture called for more expert knowledge, official interlocutors never ceased to be important in the media arena, namely in the Portuguese press.

STATUS OF SOURCES	FIRST ANALYSIS PERIOD	SECOND ANALYSIS PERIOD	SUM OF THE TWO ANALYSIS PERIODS
Official	28.1%	22.4%	26.0%
Professional	33.1%	30.5%	32.4%
Citizens	7.3%	6.2%	7.2%
Representatives of associations	4.1%	6.1%	4.4%
Non-professional	0.7%	1.5%	0.8%
Other human sources	1.2%	0.9%	1.2%
Documents	11.0%	17.3%	12.1%
Media	7.3%	8.1%	7.4%
Other non-human sources	6.5%	6.9%	6.5%
Other	0.7%	0.2%	0.0%

Table 1 Status of information sources in the articles published during the two pandemic waves in the Portuguese daily press

Looking at the themes where official sources are quoted the most, one can see that national politics stand out (500 citations), particularly in decision-making (269 citations). Due to its thematic dispersion, society also has a high frequency (305 citations). However, issues related to nursing homes (73 citations), education (66 citations), and justice (25 citations) are more prone to quoting this type of source, namely the ministers responsible for these areas: social solidarity, education, and justice. In third place, we highlight the reports (212 citations), a somewhat broad category, which includes a variety of interlocutors, with the counting of infected and dead people (82 citations) and epidemiological analyses (63 citations) being the topics where official voices are particularly prominent. Ranked fourth is international politics (148 citations), where almost half of the official citations are focused on meetings/decisions (65 citations). The economic themes are also conveyed by quoting a significant number of official sources (130), namely the issues related to the economic crisis (53 citations) where the minister of economy took the lead, often even in the place of the minister of finance. The fields

of research and development and service organizations were not approached by official interlocutors, adding 30 and 20 citations, respectively.

The most relevant official institutions in the journalistic discourse during the pandemic period (Table 2) are the government (central power, representing 14.4% in the first pandemic wave and 13.4% in the second) and local authorities (local power, representing 4.9% in the first wave and 3.2% in the second). The presidency of the republic, despite playing a relevant role in managing the pandemic, did not stand out in 2020 (with a visibility of around 1.5% in the two waves), a period that coincides with the last months of Marcelo Rebelo de Sousa's first mandate. Nor did the members of parliament have a continuous presence in the daily press, representing around 3% in both periods analyzed. Contrary to what the literature recommends (Finset et al., 2020; Ratzan, Sommarivac, & Rauh, 2020), no one took on the role of official spokesperson for what was happening. Neither did the country have an expert who could be the spokesperson for a team that would advise the government from a scientific background, as happened, for example, in the United Kingdom. In fact, and referring to the two periods of analysis, sometimes this role was played by the director-general of health (2.1%), sometimes by the assistant secretary of state for health, sometimes by the minister of health (1.3%) and sometimes by the prime minister himself (3.1%). This dispersion echoed in the daily press.

OFFICIAL INSTITUTIONS CITED	FIRST PANDEMIC WAVE	SECOND PANDEMIC WAVE
Presidency of the republic	1.5%	1.6%
National assembly	2.9%	3.0%
Mainland government	14.4%	13.4%
Regional governments	0.2%	0.5%
Directorate-General of Health	4.1%	5.0%
Regional health administrations and hospitals	3.5%	4.0%
City councils	4.9%	3.2%
Other national government sources	2.1%	2.4%
Official international sources	6.4%	4.3%

Table 2 Official institutions cited in the articles published during the two pandemic waves in the Portuguese daily press

In 2020, Portugal lived in a state of emergency between March 18 and May 2 and between November 9 and December 23. In constitutional terms, this decision presents a shared competence: the president of the republic declares a state of emergency after the government has expressed this will. Parliament must approve the presidential decree allowing for the suspension of rights, liberties, and guarantees. As can be seen, this is a decision that structurally alters the lives of all citizens. However, although throughout 2020 the president of the republic chose to make a formal communication to the country on the day he signed those decrees, the prime minister always took it upon himself to provide a more detailed explanation of that decision, also in spaces organized for that purpose and designed for media coverage.

When the state of emergency was first declared, the media reported that the government had some reservations about the presidency's willingness to move quickly to exercise a constitutional power that had never been used before. On March 17, 2020, the newspaper *Público* reported that "Costa and Marcelo disagree on the declaration of a state of emergency" (Almeida & Botelho, 2020), with the executive leaning towards the option of the state of public calamity provided for in the Basic Law on Civil Protection. That gave the prime minister and the minister of home affairs full responsibility for adopting the measures. Marcelo Rebelo de Sousa presided over a Council of State on March 18 at the Palácio de Belém, after prophylactic isolation due to a presidential initiative he attended on March 8, 2020 with a class which had a young student hospitalized for being infected. On that same day, he declared the first state of emergency in Portuguese democracy. The government complied, and parliament approved the decision with no dissenting votes.

In the second wave of the pandemic, from November onwards (and during the pre-campaign and electoral campaign for the presidential elections), Marcelo Rebelo de Sousa recalled several times that he was the one who took that first step towards the state of emergency. However, this advance did not translate into greater visibility for him. Until the end of this first phase of the state of emergency, the president of the republic and the prime minister articulated in a political and regulatory harmony that was more behind-the-scenes than public and, consequently, media-oriented. In this regard, the government has always had a great advantage. From May 3, 2020, the country entered a state of calamity, with the executive assuming the political leadership of the pandemic management in an extensive interpretation of the Basic Law of Civil Protection. The summer saw a slowdown in the containment measures, and by autumn, Portugal began to register an increase in the number of infections and deaths that would lead from November 8 to the second phase of the state of emergency lasted until December 23. Again, there are some hesitations between Belém and São Bento, whose news media's contours have never quite been explained. On November 2, 2020, *Público* wrote, "Costa proposes Marcelo a minimal but prolonged state of emergency" (M. Lopes & Botelho, 2020, para. 1). The president of the republic meets again with the parties and social partners to discuss the country's situation. In an evening interview on RTP1, he assumed supreme responsibility and criticized specific points in the pandemic management. This time, in parliament, the approval of the decision was less consensual. However, the two largest parties, PS and PSD, ensured a large majority for successive renewals of the state of emergency, which soon ceased to be minimal and was even in conjunction with general confinement, from January 15, 2021 (during the campaign for the election of the president of the republic).

In the government, the prime minister always took it upon himself to communicate at delicate moments in the pandemic management, often even making *mea culpa* of how he conveyed decisions. On November 12 2020, in the second phase of the emergency regime, António Costa, in a press conference, acknowledged that he was not effective in conveying the containment measures adopted for the weekend: "it is all my fault because

it was indeed the messenger who got the message wrong. We have to convey a strict rule, and the rule is at 1 p.m. everything is closed” (Gomes & Garcia, 2020, para. 7). On January 13, 2021, announcing the country’s second strict confinement, he said: “here I am showing my face, with no fuss or shame, going back to where we were last April” (Governo da República Portuguesa, 2021, 08:47). Besides the prime minister, who accounts for 3.8% of the sources of information cited during the second pandemic wave, other ministers stood out. In contrast, others were tossed into a spiral of silence. Among the former were the ministers of home affairs, labor, and social security, education, economy, presidency, and health, the latter gaining high visibility (2.4% of the total sources cited). However, this has not always been the case.

In the early days, it was not the holders of the ministry of health who took over communication with the country. It was the director-general of health, Graça Freitas. Daily press conferences were initially only to report suspicious cases, later proved to be unfounded. Under the state of emergency, health officials joined these meetings, adding a political dimension to them. In January 2021, Portugal was considered one of the countries with the highest numbers of infections and deaths. By then, these formats disappeared and were not replaced by any other. In an initiative on the occasion of world cancer day, in Alcochete, on February 4, 2021, the director-general of health said that she does not “need to show up” (Lusa, 2021, para. 2). She needs “to work”, adding that “other communication options were taken” without, however, specifying them (Lusa, 2021, para. 2). Before that, there were other contradictions. On January 15, 2020, with the virus already spreading, Graça Freitas stated that at that time, “this does not represent a recognized threat to public health, i.e., a new virus was identified, but it does not appear to be infectious to humans” (Daniel, 2021, 02:42). A few days later, on January 21, World Health Organization spokesman Tarik Jasarevic said the human-to-human transmission was occurring, and more cases should be expected in other parts of China and possibly in other countries. In a press conference on March 22, 2020, regarding the use of masks, Graça Freitas advocated, “there is no point in using masks (...), they serve almost no purpose. They only give a false sense of security. Don’t wear masks. Be cautious and keep a social distance. That is our appeal” (SNS | Portal do SNS, 2020, 07:56). On April 30, 2020, in a meeting with journalists to explain containment measures adopted in days to come, she said that we must wear masks to go to the shops and use more public transport.

4. FINAL REMARKS

Although the pandemic brought the experts to the center of the journalistic scene, official sources, particularly political ones, never lost prominence. Indeed, the circle of those who should be listened to has been widened. Beyond the always valued role of facts, the relevant information is added, especially with a kind of “wise knowledge” guiding a daily life that has radically changed with this pandemic. To some extent, this has

forced official sources to adjust their discourse, making it more of substance and less of rhetoric. At numerous press conferences, governments used scientific reports, visual presentations, and statistics to provide their communications with a scientifically based argumentative narrative that would convince people to adhere to their communicated measures. There was a substantial reduction in the parties' presence in the public media space in this period. Throughout 2020, party political contention has dramatically diminished, visible in the reduced numbers of party-related sources. Even the parliament has considerably slowed down the newsworthiness it usually provokes. In times of pandemic, the politicians who stood out the most were always the rulers: the prime minister more than his ministers, the ministers more than the secretaries of state, and those from specific areas of governance (health, presidency of the council of ministers, economy, education and labor, and social security).

The prime minister played a leading role in the news texts on covid-19, consistently outranking the president of the republic and the president of the assembly of the republic in media visibility. Also, within the executive, his command was notorious. For the day-to-day management of the disease, the minister of health and the director-general of health were very active players on the media stage. However, when it came to communicating decisions that involved structural changes in the functioning of society (such as confinement or more restrictive measures), the prime minister called upon himself to communicate, never sharing the stage with his minister of health. Thus it symbolized what has always been a social and news media trend: men decide, women execute.

If we focus on the news themes where official sources were quoted the most, we conclude that they converged on the most relevant moments of the pandemic. The 10 topics where official sources appeared most frequently were: political decisions; assessments of the number of deaths and infections; problems affecting nursing homes; medical action in health services; education; international meetings; epidemiological analyses; problems related to the economic crisis; the most salient portraits of the country; and what was happening in the field of justice. Moreover, this also reflected what stood out from the news point of view. This trend gradually replaced specialized sources with official ones. Both took on a much of prominence. Nevertheless, the official sources were deciding; the specialized ones explained, making the former more important.

The political communication of these interlocutors was not always the most concerted and articulate. Having never appointed a team of scientists throughout 2020 to assist it in decisions and without an official spokesperson permanently, the government has been communicating decisions through a variety of interlocutors: prime minister, minister of health, director-general of health, secretaries of state of health, and a few officials. Throughout 2020, the director-general of health held press conferences, always flanked by government officials, and it was not clear whether the meetings with journalists were technical or political. Also, the frequency oscillated, from daily to only a few days a week, eventually disappearing from January 2021, paradoxically just when the pandemic reached the most severe rates worldwide. That suggests that there was never

really a well-designed communication strategy to communicate with citizens. Rather than official sources, it was journalists who were most consistent in promoting the news of this pandemic. Furthermore, if official sources managed to quickly control the numbers of infections and deaths in the first wave, deciding quickly and communicating this clearly, throughout 2020, hesitations on these two levels increased. So did the severity of the disease. That was no coincidence.

Translation: Anabela Delgado

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PRIME TIME TELEVISION NEWS AND COMMUNICATION STRATEGIES IN PANDEMIC TIMES

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ABSTRACT

The covid-19 pandemic, declared by the World Health Organisation on 11 March 2020, had an immediate impact on the daily life of globalised societies. In the west, the virus has defied democracy and individual freedoms while demonstrating the centrality of the State and governments in managing the crisis. Communication strategies of governments and health authorities and their ability to influence mainstream media agendas were paramount in the deployment of public health restrictions and guidelines. This paper reflects on the communication strategies used by the Portuguese government during the covid-19 crisis and on their impacts on television coverage. This study was based on an empirical analysis of the first 3 months of the pandemic in Portugal by using a quantitative and qualitative assessment of news content and pre-determined systematised univocal categories. We start by presenting the global and national political, social and communicational frameworks in 2020, followed by a summary of trends and communication strategies of national and international organisations. The results are presented, discussed and interpreted from the point of view of the media coverage and communication strategies used by political and health authorities.

KEYWORDS

television coverage of the pandemic, public health communication, covid-19, Portugal, journalism

INFORMAÇÃO TELEVISIVA DE *PRIME TIME* E ESTRATÉGIAS DE COMUNICAÇÃO EM TEMPO DE PANDEMIA

RESUMO

A pandemia de covid-19, declarada pela Organização Mundial de Saúde a 11 de março de 2020, teve um impacto imediato no quotidiano das sociedades globalizadas. No ocidente, a doença desafiou a democracia e as liberdades individuais e cívicas, ao mesmo tempo que demonstrou a centralidade do Estado e dos governos na gestão da crise. Para a concretização das orientações emanadas pelos responsáveis políticos, foram centrais as estratégias e dispositivos comunicacionais de executivos governamentais e autoridades sanitárias, assim como a sua

capacidade para influenciar a agenda dos *media* dominantes. Este artigo objetiva refletir sobre as estratégias de comunicação utilizadas pelo governo português na gestão da crise e os seus reflexos na cobertura jornalística televisiva, analisada a partir de um estudo empírico que incide sobre os 3 primeiros meses da propagação do vírus em Portugal. Utiliza-se uma metodologia de análise de conteúdo, quantitativa e qualitativa, com base em categorias unívocas pré-determinadas sistematizadas no programa Excel. Inicia-se a exposição apresentando alguns elementos de enquadramento político, social e comunicacional que envolvem o desenrolar da pandemia ao longo do ano de 2020, no mundo e em Portugal. Em seguida, sintetizam-se tendências e estratégias de comunicação de organizações internacionais e nacionais. Por fim, os resultados da análise empírica são apresentados, discutidos e interpretados da perspectiva das estratégias de comunicação das instituições de saúde pública sobre a cobertura jornalística da pandemia.

PALAVRAS-CHAVE

cobertura televisiva da pandemia, comunicação de saúde pública, covid-19, Portugal, jornalismo

1. THE PANDEMIC AS THE DOMINANT SCENARIO IN DAILY LIFE

The pandemic caused by the SARS-CoV-2 virus changed, in 1 year, the global society. It also prompted a host of analyses and reflections on its consequences in domains such as geopolitics, democracy, governance, economy and health. The spread of the pandemic, which began, at the end of 2019, in the Chinese city of Wuhan, reshaped the spatial reach of neoliberal globalisation, highlighting its fragilities and perversions: low-wage industry and services; precarious and low-skilled work of migrants and women; high value-added financial and technological services; inequality in the access to housing, education, mobility, health and social protection. The following characteristics were identified in the transmission pattern of covid-19, referred to as “3C”: (a) crowded places; (b) close-contact settings; (c) confined and enclosed spaces (Fujita & Hamaguchi, 2020).

The disease also exposed the risks inherent to the global value chains (Nimmo, 2020), namely the dependence of hundreds of countries on a single provider of medical supplies, such as masks and ventilators (*EUA São Acusados de Reter Itens Médicos Destinados a Outros Países*, 2020). At the same time, it highlighted the existence of a hierarchy of access to those essential goods based on the capacity to pay, or pressure, the suppliers. Among European Union (EU) countries, these strategies also became apparent (Caetano, 2020; *França Confiscou Dois Milhões de Máscaras Destinadas a Espanha e Itália*, 2020), although the European Commission subsequently adopted a coordinated response to the pandemic (Comissão Europeia, n.d.-a), ordering vaccines for the 27 countries in the block (Comissão Europeia, n.d.-b).

International organisations, such as the United Nations (UN), the World Health Organisation (WHO), the International Monetary Fund (IMF) or the World Bank, and global organisations and associations in different areas, such as Freedom House, *The Economist* (democracy index) or Reporters Without Borders (world press freedom index), have pointed out phenomena that were aggravated by the health crisis: (a) inequalities among and within countries; (b) sovereign debt crisis and consequent State failure; (c)

fading of democracies and rise of populism and authoritarian states; (d) collapse of the health systems; (e) inequality in the access to vaccines; (f) the role of technology companies and the media (mainstream and social networks) in managing these phenomena.

Given that the virus and its propagation were unknown, the preventive measures and countermeasures adopted by the WHO (World Health Organization, n.d.-a) were inspired by the information released by China, the first country to face the pandemic. With the help of the UN, the direction of that international organisation made global coordination possible, despite the criticism and reservations of some leaders and specialists.

The lockdowns activated in a large number of countries became another contributing factor to the deepening of inequalities (Stiglitz, 2020) since most countries are unable to support, through grants, the small enterprises forced to close down and the workers. Among them, significant differences exist: some can carry out their activity through telework, and others watch their jobs, generally precarious and low-skilled, be destroyed, particularly in countries where tourism makes up a significant portion of the national income (Amaral, 2020). Therefore, countries with a greater capacity to aid enterprises and workers, such as Germany, are more protected; those without a financial buffer or more dependent on tourism, such as Portugal, are more vulnerable. In this context, and as an expression of the epidemiological characteristics and of the guidelines necessary to fight the virus, inequalities deepen among countries and workers, gender relations become more extreme (European Institute for Gender Equality, 2020; Soares, 2020), and the gap between age groups widens (Georgieva et al., 2020).

From a health standpoint, as the year progressed, there was an increase in the knowledge on the transmission of the virus; the symptoms to which it is associated; the effects of the disease; the sequelae; case fatality; mutations; the variety of available tests; the adequate medication; the potential of the vaccines and immunity levels (Leiria & Albuquerque, 2020). In the health field, it became evident that there was a need to reorganise health systems, coordinate human and material resources, emphasise the specialisation and number of professionals, and strengthen preventive and public health measures. The attempts to introduce, in Western countries, virus tracing apps clashed with civil freedoms and fuelled the debate around the dilemma concerning two value systems that are difficult to harmonise: privacy and security of individuals (Figueiras, 2021). While in autocratic countries, these functionalities were immediately introduced in mobile devices, without the need for consent, in western democracies, the access to the citizens' private data sparked discussions about surveillance and privacy. It required a more complex technology architecture and more time for these instruments to be made available (Figueiras, 2021).

The first statements issued by the Portuguese authorities on the new coronavirus date back to 15 January 2020, when the director-general of health, Graça Freitas, told journalists that “there is not a great probability of it reaching Portugal: even in China the outbreak has been contained; for the virus to reach us, someone would have had to travel from the affected city into Portugal” (Pereirinha, 2020, para. 2). A week after, due to the outbreak of cases in countries and regions outside Europe with direct flights into

the country, three hospitals were placed under alert status. On 24 January, the first two cases were confirmed in France, and evidence started to appear suggesting that the virus may be circulating in many other countries. In the following weeks, there is a worsening of the global situation and the European one, namely Italy. In Portugal, the cases of infected citizens working abroad gain prominence in the media. On 27 January, the Directorate-General for Health (DGS) issued guidelines for enterprises to implement preventive and containment measures. On 2 March, the first two cases of people infected with covid-19 were confirmed in the country, with the chain of transmission being traced back to Italy. The Portuguese government sends an order to public services requiring them to draft contingency plans for the outbreak. On 11 March, the WHO declared the disease a pandemic and warned of “alarming levels of spread and severity” and “alarming levels of inaction” (World Health Organization, 2020, para. 6). In Portugal, the state of alert is decreed by the prime minister the following day, in line with the guidelines of the WHO, which identifies Europe as the new centre of the pandemic. On March 18, the president of the republic declared the first state of emergency, which would end on 2 May, despite some measures remaining in place until the end of that month and in the following months.

The DataReportal (Kemp, 2020) found that the world changed drastically in the first three months of 2020 due to the pandemic, a change that became more pronounced throughout the year, in digital behaviour and consumption, with billions of people were in lockdown at home. Anxiously following the evolution of the disease, audiences consumed more television and news while significantly increasing their use and consumption of all other devices and content.

The same trend is pointed out in the 2021 report (Kemp, 2021), with a very significant increase in the number of hours spent watching television/news and using other devices. This scenario generated by the covid-19 pandemic had consequences for mainstream media, with advertising being drastically reduced and migrating to the digital environment. In Portugal, State aids to the media (Bourbon, 2020) and the context of the pandemic led to an adjustment in audiences' information needs and the conditions for a journalism guided by civic responsibility and responsible citizenship. Television, which many authors had deemed *dead* (Carlón & Fehine, 2014; Katz, 2009; Scannell, 2009), recovered much of its social and domestic centrality, opening up to the information in real-time and filling prime-time slots with the theme of the pandemic.

Against this international and national backdrop, it is important to consider the communication strategies that were institutionally adopted to deal with the pandemic. Our goal is to understand the impact and influence of these proposals and guidelines on the patterns and characteristics of the covid-19 pandemic news coverage in the generalist channels RTP1, SIC, TVI and CMTV. These channels were dominant in terms of prime time television news during the period corresponding to the first state of emergency and the subsequent lockdown easing plan of the government. We assume that this corresponds to a period of acknowledgement of the disease, not only among health professionals but also by the media. In that sense, the analysis of the television news coverage is also an indicator of the advancements and hesitations in that scientific and everyday learning process.

Through content analysis, we research the themes, protagonists and settings with greater visibility. Furthermore, we identify the signs of contamination of the news rhetoric by the discourse of the government and health authorities and review the areas of specialisation, institutional representations and independence levels of television commentators. Considering these elements as a whole, we reflect on the “seizing” of television channels by communication strategies and definition of the agenda by the executive power and health authorities, also reflecting on the “counterstrategies” with which television journalism seeks to affirm its autonomy and the singularity of its brand.

2. COMMUNICATION AND MEDIA AT THE “ONSET” OF THE PANDEMIC

Communication about the pandemic became a concern for the international and national institutions, in the sense of providing adequate information to political decision-makers with a view to the implementation of health measures of containment. The media (mainstream and social media) took on a relevant role as mediators between the various social actors. A variety of strategies involving different levels of actors and objectives can be identified: (a) collection, recording and processing of data about the pandemic; (b) communication strategies developed by health organisations (Vraga & Jacobsen, 2020); (c) government communication, to public health guidelines and information of public interest; (d) indoor and outdoor information from organisations; (e) information provided to the media and journalists; (f) information transmitted by the media; (g) interpersonal communication. In addition to these strategies, there are, across the board, campaigns to combat fake news, mainly on social media (Direcção-Geral da Saúde, 2020; Europol, n.d.).

The collection, recording and processing of data about the pandemic is a global endeavour undertaken by the WHO through a universally accessible website (World Health Organization, s.d.-a), analysing trends and elements by country. That same organisation provides information to citizens by publishing a newsletter and guidelines for journalists in the “Newsroom” section and offering specialised training to these professionals (World Health Organization, n.d.-b). United Nations Educational, Scientific and Cultural Organization (n.d.) also created a section on its website to support the response of countries and governments to covid-19 and help control disinformation¹.

The communication strategies of the WHO and Unesco around covid-19 are replicated by other institutions, such as the IMF. The IMF has been following the economic and social crisis caused by the pandemic, providing access to a newsletter and the IMFblog, where economists and specialists with different outlooks present analyses, assessments and proposals. Along the same lines, the EU has activated an online communication device to publicise completed and scheduled actions to combat the pandemic and to support the member states, such as the coordinated purchase of vaccines and the implementation of common crisis management strategies, support lines and recovery plans (Conselho

¹ It developed, for example, the document of support to freedom of expression and journalism *Journalism, Press Freedom and Covid-19* (United Nations Educational, Scientific and Cultural Organization, 2020).

Europeu, n.d.-b). It also shares with the institutions mentioned above the concern about disinformation (Conselho Europeu, n.d.-a). Therefore, the document *Tackling Coronavirus Disinformation: Getting The Facts Right* (European Union, 2020) sought to propose specific measures to increase the resilience of the EU, such as supporting fact-checking devices and institutions and the researchers working on this topic, intensifying the strategic communication capabilities of the EU and strengthening the cooperation with international partners, while ensuring freedom of expression and pluralism.

Corporate organisations also deployed specific communication strategies as the pandemic set in. For example, the global advisory firm FTI Consulting issued the document *Covid-19: Communication Strategies For Your Organization*, in which it proposes the adoption of measures to provide targeted information about security and changes to the services and operations of companies (Capodanno, 2020).

With regard to health communication strategies, guides have been published, such as those from the WHO and the centres for disease control and prevention (e.g., the ones from the United States, containing work about other epidemics, like ebola and zika). Associations such as the World Medical and Health Policy (Vraga & Jacobsen, 2020) and others in the field of medical and hospital care (Ontario Hospital Association, n.d.) consider new strategies in the field of health communication for covid-19 and draw attention to the need to distinguish information aimed at professionals and information aimed at the average citizen. For the former, a set of mechanisms for quick access to the available scientific information must be created. For the latter, communication should be reliable and credible, show empathy, call for responsibility, individual autonomy and public involvement, avoid the politicisation of the measures, and create a non-governmental control unit. The threat of disinformation, mainly on social media (Cinelli et al., 2020), is identified by all institutions and systematised into three challenges: information overload, the uncertain nature of the information and disinformation. These challenges, associated with the rapid evolution of the pandemic and the gaps in scientific knowledge on the new virus, must be countered through a precise communication of the core messages for specific audiences, as well as by monitoring the information of mainstream and social media, to combat myths and conspiracy theories.

In Portugal, the *Plano Nacional de Preparação e Resposta à Doença por Novo Coronavírus (Covid-19)* (National Plan for Preparedness and Response to the Disease Caused by the New Coronavirus) was drawn up by the DGS (Correia et al., 2020), in line with the WHO and the European Centre for Disease Prevention and Control (European Centre for Disease Prevention and Control, n.d.). The chain of command and control, which is responsible for the leadership and coordination regarding the epidemic at the national level, is composed of the Ministry of Health and the DGS. This central core is joined by other areas, such as education, internal affairs, justice, labour, social affairs and economy. The DGS collaborates with the National Institute of Health Ricardo Jorge to collect and refine data and the Centre for Disease Prevention and Control (Portugal). The communication strategies involve a website (<https://covid19.min-saude.pt/>), daily press conferences broadcasted live on Facebook (Ramos & Jerónimo, 2020), a daily epidemiological

bulletin published on the website of the DGS, the distribution of supplies to health organisations and professionals and directives, norms and other guidance geared towards different types of public and private agents and the citizens. This directorate-general also promoted an agreement with television stations, under which these stations comply with standards of information that are compatible with the accuracy and quality of information about the pandemic (“Pivots da RTP, SIC, TVI e CMTV Juntos a uma Só Voz Contra o Covid-19”, 2020).

Though the journalistic coverage has kept abreast of pandemics, it never obtained the level of visibility reached with covid-19. The memory of the so-called Spanish influenza, pneumonia (1918/1919), still lingers in some of the survivors and is a topic covered in some newspapers at the time, including Portuguese ones (Esteves, 2020). The titles reported on the characteristics of the disease, its national and international spread, the death toll, the preventive health actions, and the guidelines to be followed. Other pandemics, such as HIV/AIDS in the 1980s, SARS (China, 2002) or ebola (Western Africa, 2014), have received media attention.

The acknowledgement of covid-19 as having news value and an object of research for media studies was almost immediate in a media system dominated by the digital environment. Recently published studies (Ogbodo et al., 2020) show that the global media conglomerates promptly made a systematic news coverage of the pandemic. However, the way it was framed might not have been sufficiently effective in communicating the main measures of containment of the disease (Yves, 2020). At the origin of this insufficiency is the lack of a concerted strategy, on the part of the health agents and the media, to favour transparency regarding the epidemic scenarios and the clarity of the prevention messages (Organização Mundial da Saúde, 2018). On the other hand, the proliferation of digital devices and the circulation of content between institutional broadcasters, such as mainstream media, and network broadcasters/users, tend to increase information chaos, misinformation and fake news. To minimise these situations, fact-checking mechanisms are being created, such as the programme *Polígrafo* in SIC.

In Portugal, in the assessment of Lopes et al. (2020), during the state of emergency, the news media took on a clear role of guiding citizens towards disease-preventing behaviours, “seeking to become another front on the fight against the pandemic, which could have been important in helping the country stay at home” (p. 207). In the survey to journalists carried out by those authors on the topic of the journalism conducted during this period, 92.2% assumed that editorial choice, “a choice never before seen in democratic Portugal post 25 April 1974”, and which they distinguish from the practice of directing the public towards supporting certain political choices (Lopes et al., 2020, p. 211). However, the authors also stress that official communication did not suffer changes as profound as those needed by the journalistic field; it was noted that the political entities and health authorities did not always respond to questions and information requests, nor did they provide additional explanations requested by editorial offices (Lopes et al., 2020, pp. 226–227).

From a different angle, although the social responsibility of journalism is undeniable, this activity has been subject to great constraints, not only internal ones but also those stemming from the epidemiological crisis. Beyond these circumstances, there are also pressures from authoritarian governments and democratic ones that seize this opportunity to restrict freedom of expression and pluralism. Thus, Freedom House (2020) finds that:

the COVID-19 pandemic has fueled a crisis for democracy around the world. Since the coronavirus outbreak began, the condition of democracy and human rights has grown worse in 80 countries. Governments have responded by engaging in abuses of power, silencing their critics, and weakening or shuttering important institutions, often undermining the very systems of accountability needed to protect public health. (para. 1)

In analysing the role of the internet in the pandemic, that same institution states, on the one hand, that there is a “dramatic decline in global internet freedom” (Freedom House, 2020, para. 3) and, on the other hand, that big technology companies, though generally reluctant, have implemented devices to prevent disinformation.

A similar trend is noted by the organisation Reporters Without Borders (2020), which, in the 2020 World Press Freedom Index, considered “the coming decade (...) decisive for the future of journalism, with the Covid-19 pandemic highlighting and amplifying the many crises that threaten the right to freely reported, independent, diverse and reliable information” (para. 1).

This statement is confirmed by the various studies that stress the media and journalism’s responsibility and show the pandemic’s impact on consumption, such as television news. In the first case, in a study developed in Australia (Thomas et al., 2020), based on an analysis of online articles from national newspapers, research was conducted to determine who was responsible for combating the pandemic. Regarding the increase in consumption of television news, an exploratory study of Casero-Ripollés (2020), based on secondary data from the American Trends Panel of the Pew Research Center in the United States, compared periods prior to and after the outbreak and concluded that the pandemic had reactivated the viewing of news, via online press but particularly on television, providing citizens with valid knowledge about the spread of the virus.

3. EMPIRICAL STUDY: AN APPROACH TO THE “DAWN” OF THE PANDEMIC

3.1. MATERIAL AND METHODS

The *corpora* of this article comprise two data sets relating to news blocks of four generalist television channels in Portugal.

1. The first refers to the newscasts of RTP1, SIC and TVI, between 2 March 2020, when the first cases of infection in Portugal were confirmed, and 18 March 2020, when the first state of emergency was declared. It is composed of a total of 306 news reports, broadcasted in the lunchtime (153 reports) and prime time (153 reports) information blocks;

2. The second involves the evening news blocks of the generalist channels RTP1 (*Telejornal*), SIC (*Jornal da Noite*), TVI (*Jornal das 8*) and CMTV (*CM Jornal 20H*), during the period in which the first phase of the state of emergency was in effect, between 18 March and 2 March 2020, and the subsequent lockdown was easing cycle, from 3 March to 31 May 2021. In this set, among the four television channels, 900 news reports about the pandemic were codified, corresponding to 75 days, 75 news services and 225 reports per channel.

Given the volume of information, the methodological choice fell on collecting the reports relating to the first three news about covid-19, irrespective of their position in the line-up and their journalistic genre. Even though the two sets of reports are not comparable — the first covers three television channels while the second covers four, in addition to the fact that the analysis covered different news blocks — they constitute valuable material for assessing the changes in communication processes and trends of the journalistic coverage of the pandemic.

Previously cited studies on journalistic attention to epidemics constitute the grounds for the empirical work. The quantitative methodology involved setting up a database in Excel and extracting outputs concerning predefined categories. This procedure enabled the recording, numerical processing of manifest content and extraction of indicators capable of supporting replicable and objective inferences of the substance of the message(s) to understand the observed phenomena. On this basis, a content analysis was performed; this research technique applies to all media and aims at the systematic and quantitative description of the manifest content (Cunha & Peixinho, 2020). The analysis aims at data *objectivity* and *systematisation* to point out indicators that allow for its *generalisation* in similar contexts (Bauer & Gaskell, 2002). The sequence involved a pre-analysis stage and the subsequent consolidation of categories, grounded in the pre-analysis and a literature review, which were parametrised in Excel. The results will enable a reflection on the television coverage of an exceptional event, such as the pandemic.

Thus, based on the literature and a comparative perspective between the two sets of news reports — with a *caveat* concerning the channels that were analysed and the time period —, the aim was to find a reply to the following questions: (a) which themes concerning the pandemic had greater visibility; (b) which protagonists in the political and health areas were more salient; (c) which settings were allocated to the pandemic. For this study, a subcorpus composed of the news reports focusing on the most frequent covid-19 themes was also set up, looking for signs of contamination of the journalistic coverage by the discourse of the government and health authorities. A second subcorpus was drawn, in which the protagonists are the medical commentators. This made it possible to identify in greater detail the areas of specialisation, the institutional representation and the level of independence in their contributions.

By replying to these questions, it was possible to observe the trends of the journalistic television coverage and track the communication strategies for the media adopted by the governmental institutions, namely the DGS, and their influence on the journalistic agenda.

3.2. RESULTS

3.2.1. THE PERIOD FROM 2 TO 18 MARCH 2020

The first three news reports of the line-up about the coronavirus outbreak on the RTP1, SIC and TVI channels tended to favour the themes of “epidemic/pandemic”, “lockdown measures”, “guidelines of the Directorate-General for Health”, and “health status”. Looking deeper into the symbolic associations of the theme “assessment”, it can be seen that those reports were mostly connected with the subtheme “infected”, and specific semantics was used there to describe the various clinical situations and their daily evolution, drawing inspiration from the terminology used by the health authorities in their bulletins: “infected”, “recovered”, “suspected” — a term later abandoned — or “under monitoring” and “deaths”.

The protagonists that stood out were, first and foremost, the patients. These anonymous, faceless figures were the centre of attention, as they represent both the embodiment of the virus and its progression within the community. The minister of health (Martha Temido), the prime minister (António Costa), the director-general of health (Graça Freitas), and the republic president (Marcelo Rebelo de Sousa) also stood out. Thus, in this broader assessment, it was possible to note the protagonism of the political sources of or connected to the government in managing the crisis. The president of the republic was another political protagonist that stood out in terms of the response of the sovereignty bodies to the outbreak and as a subject of self-isolation. In contrast, in the news reports that compose this sample, the parliament and the political parties had barely any expression. Hospitals, press conferences, streets or cities, studios and meeting rooms were the images that most frequently provided a visual frame for the news reports under analysis, constituting “the settings” on the three television channels (Table 1).

THEMES	PERCENTAGE	PROTAGONISTS	PERCENTAGE	SETTINGS	PERCENTAGE
Epidemic/pandemic	30.3	Patients	16.9	Hospitals	32.0
Assessment	24.1	Minister of health	12.0	Press conferences	15.3
Lockdown measures	14.0	Prime minister	11.7	Streets/cities	15.0
Guidelines of the Directorate-General for Health	7.5	Director-general of health	8.5	Studios	11.4
Health status	9.4	President of the republic	8.5	Meeting rooms	9.4

Table 1 Top 5 themes, protagonists and settings of the first three news reports about the pandemic broadcasted in the afternoon and evening news blocks of RTP1, SIC and TVI — 2 to 18 March 2020 (%)

Note. N = 306 (total number of news reports analysed in the afternoon and evening information blocks of RTP1, SIC and TVI, between 2 and 18 March 2020)

In this exploratory study, findings were also made as to the growing relevance of anchors, who tended to open their newscasts with emotional and compelling texts while

also adopting an educational tone, supporting the guidelines of the DGS about the behaviours that should be adopted in view of the pandemic. Medical and biomedical elements were introduced in the coverage of this theme, aiming at the adoption of preventive and prophylactic behaviours. The story of covid-19 became a social construction on the Portuguese television channels, with several protagonists — authorities, specialists and heroes — and settings, such as press conferences, meeting rooms, studios and hospitals. The collected elements have concluded that the challenge posed by the virus and the pandemic brought the health authorities and mainstream media of Portugal together around the goal of informing, educating and providing guidance to citizens. The creation of the news resorted to a dual routine: the routines specific to television journalism, involving lives, reports, vox pops and archive footage; and those related to the pandemic, from the Ministry of Health and the DGS.

Given the gentleman's agreement between the DGS and the mainstream media, the health authorities gained a relevant role as gatekeepers, determining the information and the angle of the news, as shown in the themes with greater visibility that were identified. This exploratory study provides evidence suggesting the adherence to the primary definers of information, that is, to how they defined the agenda and framed the problem. The growing limitations to the circulation of journalists, for security and public health reasons, increased their dependence on the events organised by those protagonists from the government or from the sphere of the executive, who controlled the resolution of the crisis, such as meetings and press conferences (Cabrera et al., 2020).

3.2.2. THE PERIOD FROM 18 MARCH TO 31 MAY 2020

In this period, as previously mentioned, the analysis covered the first three reports relating to covid-19 in the prime time news blocks of the channels RTP1, SIC, TVI and CMTV, in a total of 900 news. The aggregated results in themes, protagonists, and settings constitute the specificities of the state of emergency (18 March to 2 May) and the lockdown easing (3 to 31 May). The big picture (Table 2) concerning this data is drawn based on the top 5 themes, protagonists and settings.

THEMES	PERCENTAGE	PROTAGONISTS	PERCENTAGE	SETTINGS	PERCENTAGE
Assessment	27.2	Anchors	13.2	Press conferences	25.0
Lockdown easing plans	13.8	Prime minister	12.4	Streets/cities	16.5
Health status	11.1	Director-general of health	9.1	Infographics	9.7
Economic and social crisis	8.4	Minister of health	6.7	Hospitals	7.8
Covid-19 tests	8.0	President of the republic	6.7	Studios	6.5

Table 2 Top 5 themes, protagonists and settings of the first three news reports about the pandemic in the evening news blocks of RTP1, SIC, TVI and CMTV — 18 March to 31 May 2020 (%)

Note. N = 900 (total number of news reports analysed in the evening information blocks of RTP1, SIC, TVI and CMTV between 18 March and 31 May 2020)

The most relevant themes are the assessments, lockdown easing plans, health status, economic and social crisis and covid-19 tests. The category of the “protagonist” includes, in hierarchical order, the anchors, the prime minister, the director-general of health, the minister of health and the president of the republic. Among the settings, the images of press conferences, streets or cities, infographics, hospitals and studios are dominant.

In an attempt to track the specificities of the journalistic coverage during the emergency and lockdown easing periods, disaggregated data are presented below (Table 3). The emergency period (18 March to 2 May), which accounts for 552 news, shows that there are fewer references to lockdown easing plans and the economic and social crisis, while the five most relevant protagonists are the prime minister, the anchors, the president of the republic, the director-general of health and the reporters.

EMERGENCY PERIOD					
Themes	Percentage	Protagonists	Percentage	Scenarios	Percentage
Assessment	29.5	Prime minister	14.6	Press conferences	26.2
Health status	17.7	Anchors	12.8	Streets/cities	19.9
Supervision/ health measures	7.2	President of the republic	7.6	Infographics	10.1
Covid-19 tests	7.2	Director-general of health	7.2	Hospitals	8.3
Economic and social crisis	6.3	Reporters	6.3	Studios	6.3
LOCKDOWN EASING PERIOD					
Themes	Percentage	Protagonists	Percentage	Scenarios	Percentage
Lockdown easing plans	26.4	Anchors	13.7	Press conferences	22.9
Assessment	23.5	Director-general of health	12.0	Streets/cities	11.2
Economic and social crisis	11.7	Population	8.9	Entertainment venues	10.0
Covid-19 tests	9.1	Prime minister	8.9	Infographics	9.1
Directorate- General for Health guidelines	6.3	Minister of health	7.7	Hospitals	7.7

Table 3 Top 5 themes, protagonists and settings of the first three news reports about the pandemic in the prime time news blocks of RTP1, SIC, TVI and CMTV from 18 March to 2 May 2020 (N = 552) and from 3 to 31 May 2020 (N = 348; %)

Note. N = 900 (total number of reports analysed in the evening information blocks of RTP1, SIC, TVI and CMTV between 18 March and 31 May 2020)

In the lockdown easing period (3 to 31 May), which accounts for 248 reports, we would point out in the top 5 an increase in the news reports about the theme of economic and social crisis and guidelines of the DGS, as well as the appearance of new protagonists, such as the population and the minister of health. Also to be noted is the fact that the anchors gained even more visibility in comparison with the previous period, while the director-general of health and the prime minister became less relevant. Regarding the settings, there are similarities and differences. Among the similarities is the relevance given to images of press conferences, streets or cities and infographics through which

the data on the pandemic are presented. The differences appear in the greater use of studios as the setting in the first period analysed and in the use of images of entertainment venues in the second period.

3.3. DISCUSSION AND FINAL CONSIDERATIONS

The strategies adopted by the public health staff and the political authorities involved television as a crucial communication tool. Furthermore, the virus and the pandemic information became highly strategic for the health and political authorities and the television channels. For the health agents and political actors, the use of generalist channels with a bigger audience in Portugal allowed them to publicise and justify their measures, increase public health literacy and mobilise citizens towards compliance with restrictive rules in daily life. At the same time, those same actors ensured that the information transmitted was transparent and correctly explained to influence behaviours, minimize risks, and avoid panic, alarm, and social disruption during the pandemic. By supporting this strategy and becoming the media with more information and greater national demand regarding the pandemic, television channels broke audience records (Cardoso, 2020) and consolidated their brands.

The findings that were made reflect this dynamic, which is attested by the visibility of the themes relating to the assessments, decisions and guidelines about preventive and lockdown measures. While the information on covid-19 became a priority, it is also noticeable that the channels invested in the differentiation of the information offered. That presentation followed the official information from the DGS and included data on geographic distribution, clinical characterisation of the cases (infected, hospitalised, intensive care, recovered, deaths), affected age groups, timeline, the intensity of the transmission and impact of the disease on the National Health Service. Also to be highlighted is the gradual appropriation by anchors, journalists and reporters of the scientific terminology applied to the pandemic to ensure the accuracy of the messages they convey. This effort to incorporate the technical and scientific demands is reflected in the presentation of the data by means of infographics. At the same time, the television stations invested in differentiating their offer through the graphic work in their studios, the originality of the diagrams used in the infographics, the mobilisation of commentators/specialists and the emphasis placed on the role played by the anchors. The goal is to strengthen the brand and specificity of each channel.

For example, early on, at the beginning of March, as the first cases were recorded in Portugal, RTP1's infographic (2 March, 2020, 13:02:54; Figure 1) displayed the virus and a test tube. Ten days later, already at 78 confirmed cases in the country, TVI (12 March 2020, 13:01:53; Figure 2) displayed an infographic with the geographical distribution of the infection. In mid-May, a few days before the end of the state of emergency, CMTV (10 May 2020, 20:34:19; Figure 3) presented the total number of infections, deaths, recoveries, cases under examination and admitted to intensive care. Then, at the end of May, already during lockdown easing (28 May 2020, 20:02:08; Figure 4), SIC highlighted the risk of transmission of the disease over time to explain the concept of TR (transmissibility index).



Figure 1 Presentation of data — RTP1

Source. RTP 1 (2 March, 2020, 13:02:54)



Figure 2 Presentation of data — TVI

Source. TVI (12 March 2020, 13:01:53)



Figure 3 Presentation of data — CMTV

Source. CMTV (10 May 2020, 20:34:19)



Figure 4 Presentation of data — SIC

Source. SIC (28 May 2020, 20:02:08)

In addition to this branding, health specialists were scheduled to appear as commentators. This is a strategy aimed at adding value to the official information used by all the channels. From a perspective of competing for audiences, the purpose is to have the assistance of a renowned expert who can present his or her knowledge based on good communication with the general public. There are commentators/specialists in all the channels, such as infectious disease specialists, immunologists, public health specialists, epidemiologists, pulmonologists, intensive care physicians, hospital directors in the relevant areas, and health statisticians. The purpose of this strategy was to add more elements and seek alternative sources of information to avoid having news that was limited to the official information and dependent on the primary sources from the government and the commitments with DGS. In this context, the medical specialists became soaring media figures and opinion leaders (Figures 5, 6, 7 and 8).



Figure 5 Specialists and physicians become media figures (António Silva Graça, infectious disease specialists)

Source. RTP 1 (13 May 2020, 20:21)



Figure 6 Specialists and physicians become media figures (Ricardo Baptista Leite, infectious disease specialists)

Source. CMTV (13 May 2020, 21:05)



Figure 7 Specialists and physicians become media figures (Pedro Simas, virologist)

Source. TVI (14 May 2020, 21:04)



Figure 8 Specialists and physicians become media figures (Ricardo Mexia, public health specialist)

Source. SIC (20 May 2020, 21:15)

From another point of view, this tendency is also a corollary of the growing importance of health-related communication and journalism, a context in which the literature assesses the value of specialised sources for a news discourse that is more accurate in what it reports and more educational for citizens (Lopes et al., 2020, p. 207).

Along the same line of the brand, strengthening is the choice of the settings that accompany the news, which favours certain images or editing strategies relating to press conferences, streets, cities and hospitals, as well as makes use of aerial footage of hospitals, streets, cities and other places captured by drones. The search for originality and singularity is also present in the use of images from inside the hospitals (hallways, infirmaries, specialised services or health professionals) or of patients in intensive care services, using health professionals to that effect.

A similar process occurred concerning the protagonists of the news. Even though, as previously mentioned, the political actors (prime minister and president of the republic) and health actors (minister of health and director-general of health) gained significant visibility, it is evident that the anchors are the great protagonists. On the one hand, if they take on a dimension inherent to public service — to inform, educate and prevent —, on the other hand, they also strengthen the quality of their branding within the television station in which they work. Anchors become important because they introduce

and present the data, the clarity and emotion they bring to their speeches about the pandemic, giving rise to a star system of journalist influencers who draw audiences and guide viewers (Mexia, 2020).

Translation: Adriana Barreiros

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THE IMPACT OF COVID-19 ON JOURNALISM: A SET OF TRANSFORMATIONS IN FIVE DOMAINS

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ABSTRACT

The covid-19 outbreak is a highly disruptive event in our society. Its consequences have affected different social domains. Our objective is to analyse its impact on journalism in a panoramic and comprehensive way. We intend to identify the main alterations and changes that the outbreak of the coronavirus has caused. The methodology is based on the qualitative analysis of secondary data, taking the case of Spain during the first period of the pandemic as a reference. The results allow the identification of positive and negative effects in five areas: news consumption, business models, working conditions, disinformation, and relations with political actors. These findings reveal that covid-19 has had a considerable impact on journalism. This incidence is ambivalent as it has positive and negative effects that affect different aspects of this domain. The main positive consequences are increased news consumption and the promotion of new formats and information products, such as infographics or newsletters. On the other hand, the weakening of business models due to the reduction of advertising revenues, the deterioration of journalists' working conditions, the reinforcement of political control mechanisms over the media, and the increase of disinformation are the main negative effects.

KEYWORDS

covid-19, coronavirus, journalism, media, business models

O IMPACTO DA COVID-19 NO JORNALISMO: UM CONJUNTO DE TRANSFORMAÇÕES EM CINCO DOMÍNIOS

RESUMO

O surto da covid-19 é um acontecimento altamente perturbador na nossa sociedade e as suas consequências têm afetado diferentes domínios sociais. O nosso objetivo é analisar o seu impacto no jornalismo de uma forma multidisciplinar e abrangente. Pretendemos identificar as principais alterações e mudanças que o surto do coronavírus provocou. A metodologia baseia-se na técnica da análise qualitativa de dados secundários, tendo como referência o caso da Espanha durante o primeiro período da pandemia. Os resultados permitem a identificação de efeitos positivos e negativos em cinco áreas: consumo de notícias, modelos de negócio, condições de trabalho, desinformação e relações com os atores políticos. Estas descobertas revelam que o covid-19 tem tido um impacto considerável no jornalismo. Esta incidência é ambivalente, pois tem efeitos tanto positivos como negativos que afectam diferentes aspectos deste domínio. O aumento do consumo de notícias e a promoção de novos formatos e produtos informativos, tais como infografias ou boletins informativos, são as principais consequências positivas. Por outro lado, o enfraquecimento dos modelos de negócio devido à redução das receitas publicitárias, a deterioração das condições de trabalho dos jornalistas, o reforço dos mecanismos de controlo político sobre os meios de comunicação, e o aumento da desinformação são os principais efeitos negativos.

PALAVRAS-CHAVEcovid-19, coronavírus, jornalismo, *media*, modelos de negócio**1. INTRODUCTION**

Initially appearing in China at the end of 2019 and becoming widespread in Europe and the rest of the world by March 2020, covid-19 is a highly disruptive occurrence. Not only because of its high mortality, causing 2.400.000 deaths and 108.600.000 contagions worldwide by February 2021, but because of its ability to upset all realms of our society. In fact, coronavirus has become a mega-event with the potential to produce consequences in different social domains, such as journalism. It has generated a broad consensus on the idea that it could end the world we have lived in until now and bring about radical social changes, increasing uncertainty, and fragility (Zizek, 2020).

This article aims to offer a panoramic and comprehensive approach to the impact of covid-19 on one of the main domains of our society: journalism. As such, we aim to identify the main alterations and changes the outbreak of this pandemic has provoked in this sector's processes and dynamics. In this way, an initial diagnosis of its possible effects will be presented, which can be contrasted in the future with new medium and long-term analyses.

The methodology used is the qualitative analysis of secondary data from surveys, audience studies, and economic data on journalistic companies. As an interpretative theoretical framework, we draw upon the social role of journalism, political communication, and the political economy of communication. The case of Spain is taken as a geographical framework. The analysis is based on five areas within which the initial impact of covid-19 is examined: news consumption, business model, working conditions, misinformation, and relations with the political sphere.

2. IMPACT ON NEWS CONSUMPTION

The health emergency caused by the covid-19 outbreak led to a sharp increase in news consumption. The need to inform oneself and gain knowledge about the pandemic to reduce anxiety and orient oneself in the face of this complex situation has set off a worldwide increase in news demand in both the conventional and digital media and on web pages. In this way, news media became a product endowed with a high social value, reversing the trend that, in recent times, had evidenced its loss in relevance (Casero-Ripollés, 2014).

Thus, in the United States, according to data from the Pew Research Center (2020), 92% of citizens actively consumed news about the coronavirus, registering a 32% increase at the onset of this health crisis. Only 2% stated they did not seek information about the virus. By platform, 96% of Americans were informed about covid-19 through national free-to-air television and cable television. A percentage of 93% opted for printed newspapers, 94% turned to web pages or applications, and finally, 87% turned to social

media. In Spain, news consumption presented similar figures at the start of the pandemic. Hence, according to data from Havas Media (Ruiz de Gauna, 2020), 85% of citizens used television to learn about the coronavirus. Some 54% turned to the digital press, while 13% opted for printed media. Finally, 41% were informed via the internet and 38% through social media. Only 1% of Spaniards declared not actively searching for information about the virus.

This data shows two interesting trends. On the one hand, the full establishment of a hybrid media system in which traditional and digital media coexist (Chadwick, 2017). Second, the institution of a complementarity dynamic in consuming different media simultaneously (Dutta-Bergman, 2004). Rather than generating a replacement of the old media with the new, covid-19 has encouraged citizens to use various media and media channels to obtain data on the pandemic. Consequently, in a complementary fashion, they have sought to enrich their subject knowledge by trying to combine various media to obtain greater satisfaction.

Another of the main trends detected in the coronavirus outbreak was the resurgence of traditional media compared to digital media (Casero-Ripollés, 2020). The most significant increases and percentages of news consumption were focused on these media, particularly on television. In a context marked by risk and complexity, the public opted for well-established, reliable news sources with a consolidated track record (Nelson, 2020). In this way, traditional media were at the centre of the communication system, clearly surpassing social media, mobile applications, or web pages as the preferred space from where to be informed (Ferreira & Borges, 2020). With this, they regained part of the journalistic authority they had lost due to the identity and relevance crisis these media experienced over the last decade (Carlson, 2017; Liu et al., 2020).

On television, there was an audience increase of 60% in the United States, according to data from Nielsen (Perez, 2020). Nightly network television newscasts grew by 42% compared to the same period the previous year, and cable news experienced a 92% audience increase compared to early 2020 (Perez, 2020). For its part, in Spain, television consumption increased by 37.8% between the first and second fortnights of March 2020, coinciding with the worsening health situation (Barlovento Comunicación, 2020). That was an increase of 88 minutes per person per day of television consumption. As a result, the month of March 2020 recorded 284 minutes per person of daily television consumption, even reaching 344 minutes per person on Sunday, March 15, 2020. These were the highest figures since 1992 when television audiences began to be measured in Spain.

In addition, the situation of confinement generated another relevant phenomenon in the news and media consumption: the shift of the maximum audience slot from prime time to day time. In other words, the data indicates that the preferred television viewing time went from being located at night, from 10 p.m. to being located in the mornings, between 9 a.m. and 2 p.m (Barlovento Comunicación, 2020). The audience increase in this last slot in Spain during the coronavirus outbreak was 64.5% (Barlovento Comunicación, 2020). Conversely, prime time, more closely linked to entertainment, rose by 21.1%. This trend was not unique to Spain but was also detected in other countries. Thus,

in the United States, daytime grew by 39% during the health crisis, while prime time fell by 5% (Weissbrot, 2020). Two reasons explain this change. In the first place, due to confinement, the availability of time for citizens to consume news outside the time slots when people were usually away from home carrying out their work grew. The flexibility of teleworking and the need to be informed led to an advance in morning-time television news consumption. Secondly, the link between prime time with entertainment and daytime with information, as a key ingredient to start the day, favoured the latter in the context of a high news demand.

For its part, the increase in digital press consumption time in Spain during the initial weeks of the coronavirus crisis was 35% (Gfk, 2020). Time spent on social media increased by 45%. By media, Facebook time went up 46%, Instagram by 34%, and Twitter by 23%. The latter network also increased user numbers by 21%, while Instagram grew by 3%, and Facebook experienced no increase in users during the second half of March 2020 (Gfk, 2020).

Finally, the widespread increase in news consumption during the coronavirus outbreak also led to the reconnection of some of the more distanced public with a lesser interest in the information (Barlovento Comunicación, 2020; Casero-Ripollés, 2020). The most significant increases in consumption were recorded in the United States and Spain, in people previously connected to the news less, such as young people, people with lower education levels, and sporadic information users. The need for guidance and awareness of developments in the health situation led to a significant increase in the percentages of news consumption among these groups. This reconnection, fostered by covid-19, of information-distanced citizens has positive consequences in democratic terms. Inequalities among citizens in accessing the news were reduced, favouring greater equality with its consequent social and democratic benefits (Casero-Ripollés, 2020).

3. IMPACT ON THE BUSINESS MODEL

The increase in news consumption recorded since the beginning of the pandemic in Spain was not accompanied by increased media advertising revenues. On the contrary, these were notably reduced. The falls were industry-wide. According to Infoadex data (Rivas, 2020), the overall reduction in the Spanish advertising market between January and September 2020 was 22.2%. In total, the losses amounted to €942,300,000. In the case of newspapers, the drop in advertising revenue during this period was 32%, equivalent to a loss of €175,800,000. Radio lost 28.8% of its advertising revenue, equivalent to €100,400,000. Television, on the other hand, fell by 24.4%, losing €344,600,000 in advertising revenue. Between them, these three media accumulated 65.88% of the total advertising losses deriving from covid-19.

This data shows that, despite the explosion in news consumption, advertising revenues have contracted sharply. There can be several explanations for this paradox. First, the reduction in investment by brands is due, in part, to the general fall in sales resulting from the economic paralysis imposed by the confinement. In the face of the closure

of establishments considered non-essential, decreed by the state of alarm, advertising came to a halt. Travel, automotive, and sports sectors, which allocated the most economical resources to traditional advertising, experienced the most significant reduction in advertising investments. On the other hand, the displacement of a significant percentage of the population towards online shopping, estimated in Spain at 25% (Fernández, 2020), can generate new consumer habits that impact advertising investments. If this crisis consolidates this online consumption transition, traditional media may see its advertising revenues further reduced in the future as, in this scenario, it is likely advertisers will target digital media and platforms more.

Secondly, a dynamic similar to that generated after the 2008 global financial crisis has been reproduced. This recession eliminated some \$60,500,000,000 from the advertising market worldwide (Fernández, 2020). Given the economic difficulties associated with covid-19 for companies, advertising investment has been one of the first items to be reduced or frozen. In the United States, 56% of brands expected declines in their sales for the remainder of 2020 (McDonald & Clapp, 2020). As a result, 81% of advertisers in the US decided to reduce their advertising budget. In the case of mainstream television, this percentage stood at 65%. In Spain, 44% of marketing and communication directors expect advertising spending to be reduced by 30% throughout 2020 (Good Rebels, 2020). In particular, the government of Spain forecasts a decrease in the gross domestic product (GDP) of 9.2% due to the crisis arising from the coronavirus. This data allows us to predict that the contraction in advertising investment will not disappear with the return to the new normal. In fact, advertising investment contracts by 5% for each decrease in a point in GDP (Picard, 2009). Because of the impact of the covid-19 crisis on the economy, the media is likely to suffer, in short to medium term, the negative impact on its finances of declining advertising investment, significantly weakening its economic position.

Along with the reduced advertising revenue, the coronavirus outbreak has also affected another key component of the business model: the sale of the newspaper product. The health emergency has significantly harmed the sale of paper newspapers at newsstands. In Spain, it is estimated that printed daily sales dropped between 80% and 90% in the early days of confinement (Cano, 2020).

Before the emergence of this crisis, the Spanish media was in a transformation process based on implementing payment formulas for online access to their content. Several relevant newspapers such as *The Mundo*, *ABC*, *La Vanguardia*, and *El País* have implemented paywalls in their digital versions between 2019 and 2020. The high news consumption during coronavirus has increased paid subscriptions to news media. In Europe, they have increased by 267%, while in the United States, the rise has been 63% (Cerezo, 2020). This data seems to open the way to break the ceiling of reader willingness to pay to access digital news that struggled to exceed 10%-20% in total over the past decade. In fact, a global survey recently quantified that percentage to be 16% (World Economic Forum, 2020). In addition, digital media that are committed to offering free access to their contents have also benefitted from this context of a greater predisposition

towards paying. Thus, eldiario.es, a pure Spanish player, managed to attract 9,000 new subscribers at the start of covid-19, reaching 47,000 (Cerezo, 2020).

This data suggests an increase in the number of media establishing a paywall in the digital environment in the short term. In fact, in 2021, one of the strategic priorities of publishers is to increase the number of digital subscribers (Newman, 2021). Covid-19 will thus contribute to accelerating the change in the journalism business model by promoting digital versus print versions (Newman, 2021).

The challenge for journalism will be to maintain readers' willingness to pay or keep up the financial support that the need for information on covid-19 has generated when this crisis is over. The health emergency has restored the exchange value that the news had lost in recent years (Casero-Ripollés, 2014). The coronavirus outbreak has demonstrated how the media can recover the value of the news: to bet on quality information relevant to citizens' lives. The media must take advantage of the start of this exceptional moment to implement their payment formulas, taking advantage of the public's perception of the need for news in today's complex world.

4. IMPACT ON JOURNALISTIC COMPANIES AND JOURNALISTS' WORKING CONDITIONS

The reduction in advertising revenues due to coronavirus, coupled with problems in the business model, has had a strong impact on the media economy in Spain. Four associations of newspaper publishing companies, representing 260 Spanish publishing groups, estimated that the covid-19 crisis would result in losses of €250,000,000 (Asociación de la Prensa de Madrid, 2020). At the moment, the first financial results demonstrate the negative impact of this health emergency. Thus, Vocento's revenue, one of the leading newspaper publishers, fell by 17.2% in the third quarter of 2020. For its part, Prisa, the editor of *El País* among others newspapers, lost €219,000,000 in 2020, and its newspapers reduced their revenues by 25% (Asociación de la Prensa de Madrid, 2020).

These findings illustrate the tricky balance between monetisation and the provision of an essential public service offering information about the pandemic. The increased information demand has not resulted in a positive impact on the business dimension of journalism. The media has failed to take advantage of increased news consumption to achieve economic benefits. That leads to inefficient monetisation and an unprecedented weakening in the business. That has led the press to request aid from the Spanish government to correct such market-generated imbalances and protect its vital role in providing news for society on relevant events, such as covid-19.

The loss of economic revenue due to coronavirus by the media enterprises has affected journalists' working conditions. Thus, one of the first consequences has been generalising temporary employment regulation plans (*expediente de regulación temporal de empleo*; ERTE). According to data from the Spanish labour ministry (Ministerio de Trabajo y Economía Social, 2020), in the information services sector, which encompasses journalism, 2,435 people were affected by some type of ERTE until April 2020. The large newspaper publishing groups in Spain (Prisa, Vocento, Prensa Ibérica, Unedisa, Godó, Henneo,

and Joly) made use of this formula, reducing the working hours and salaries of their staff reporters between a minimum of 11% and a maximum of 50% over a 3 to 6 month period. That has directly affected the production of journalistic content that experienced a 14.2% sector-wide decline during the initial phase of the health emergency in Spain.

In addition, the reduction in corporate profits has also led to an increase in the layoffs of journalists, adversely affecting the working conditions of the sector. Before the advent of covid-19, data from the working population survey (Instituto Nacional de Estadística, 2020) indicated the lowest levels of unemployment in the last decade among journalists in Spain. By contrast, the pandemic's effects have put these figures at 24,600 people during the first quarter of 2020, placing them at a similar level to the data from the first quarter of 2008, which marked the beginning of the financial crisis that has severely affected journalism over the last decade. Moreover, in the United States, the coronavirus led to the drop in media jobs estimated to increase by 35% compared to 2019. With data from April 2020, the number of people laid off, suspended from employment, or affected by pay cuts was 37,000 in total (Tracy, 2020), a scenario that shows the pandemic can lead to a process of global job destruction.

On the other hand, the confinement imposed in the face of the covid-19 outbreak has increased teleworking in the media sector. Before the coronavirus crisis, only 19.6% of journalists claimed to work from home (LeanFactor, 2020). However, the health emergency has emptied newsrooms and set off forms of news production and online editorial coordination in a generalised fashion. In this sense, net-based organisational models and greater digital weight in business structures have been reinforced.

Many technology companies, such as Facebook or Google, notified their employees that they would work from home until early 2021. In particular, Twitter stated that it would permanently allow teleworking for some of its professional profiles even after the pandemic. For his part, the editor of *The New York Times*, A. G. Sulzberger, announced that until September 2020, physical writing would not return and advanced that he had begun to design a long-term vision for remote work based on what was being learned from the covid-19 experience. All this indicates that this health emergency has hastened the digital transformation processes of media organisations and the decentralisation of journalistic work, which is likely to be less and less dependent on physical newsrooms (Newman, 2021). Along these lines, labour flexibility within the sector is likely to increase, and new models of a contractual relationship between journalists and media companies are likely to emerge. An even more significant increase in the prominence of digital technologies in news production processes and an increase in decentralisation and off-shoring can also be expected. According to a survey, 40% of Spanish journalists said these would be the most likely consequences of covid-19 for the sector (LeanFactor, 2020). Both will foster the advance of deep mediatisation in a framework where the digital is inextricably intertwined with journalism, becoming the main, and almost the only, infrastructure that allows the sector to function (Hepp, 2020).

The increase in flexibility and teleworking can also pose threats to the working conditions of journalists. In the first place, it will mean the need for more significant

technological investment for media companies in a context where their economic resources are scarce. In the coronavirus crisis, only 44.6% of Spanish journalists confirmed that their company had provided the necessary technological equipment to telework with guarantees (LeanFactor, 2020). In addition, taking the scenario of widespread business weakness and layoffs caused by covid-19 into account, it cannot be ruled out that these new dynamics involve slimming down the media workforce or increased precariousness in the sector. Prensa Ibérica, a prominent Spanish local newspaper publishing company, predicted that by the end of 2020, the pandemic could lead to a reduction in its workforce of 400 people. On the other hand, the emergence of new forms of contractual relations may lead to deteriorating working conditions for journalists, with a consequent increase in insecurity and instability.

Telework and the high information demand have meant that the media have proposed the implementation of new journalistic formats in their covid-19 coverage (Casero-Ripollés et al., 2020). The media has strived to produce news and generate new news products, such as digital newsletters, podcasts or infographics (Costa-Sánchez & López-García, 2020). Similarly, faced with the proliferation of fake news, they have also reinforced data verification and the fight against misinformation. In this way, they have brought added value to journalistic information about coronavirus. This crisis has shown that these new products can also enhance information quality and the connection with the public.

Finally, covid-19 has affected journalists' working conditions from a health point of view. Professional journalists have put their personal safety at risk by reporting on the virus on the front line. Their work has placed them, in many cases, in direct contact with coronavirus. This situation has entailed physical danger due to the possibility of infection when reporting on the health emergency and psychological danger since they face the consequences of the pandemic daily. The pressure to report on a severe health crisis has managed to cause anxiety and trauma for journalists (Perreault & Perreault, 2021). In this context, the network Red de Colegios Profesionales de Periodistas (Professional Colleges of Journalists) in Spain as well as the Asociación Española de Comunicación Científica (Spanish Association of Scientific Communication), the Committee to Protect Journalists or the International Federation of Journalists have published recommendations on how to safely report, trying to mitigate the effects of this health crisis on the sector's professionals (Costa-Sánchez & López-García, 2020).

This severe health risk in reporting on covid-19 has underlined the high social commitment of journalists. Faced with a potentially dangerous and complex situation, they have prioritised the values of public service and professional ethics to let citizens have access to information understood as the basis of social knowledge. In addition, they have prioritised the right to citizenship information, redoubling their professional dedication to producing information about the pandemic. A percentage of 69% of Spanish journalists claimed to have worked longer hours than in the situation prior to the health emergency (PRGarage, 2020).

5. THE IMPACT ON DISINFORMATION AND THE CIRCULATION OF FAKE NEWS

The circulation of fake news experienced substantial growth as a result of covid-19. According to data from CoronaVirusFactsAlliance (Poynter Institute, n.d.), an initiative that brings together various data verification organisations around the world under the impetus of the Poynter Institute sponsored International Fact-Checking Network, 11,022 fake news items related to this pandemic had been detected around the world by the end of January 2021. In Spain, according to Maldita.es (2021), 1,196 misleading information has been recorded from the beginning of the coronavirus until November 2021. This data has led the World Health Organization (WHO) to classify this situation as an “infodemic”. This neologism refers to an excess of information, much of it false or misleading that prevents citizens from accessing reliable information sources on a subject.

The magnitude of this phenomenon concerning covid-19 has stirred various institutions into reacting. Hence, the United Nations has promoted the Verified initiative to address misinformation by providing accurate and reliable information worldwide. The WHO, for its part, has launched the *EPI-WIN* project to debunk the main hoaxes about the pandemic. The Poynter Institute has also promoted the Corona Virus Facts Alliance initiative to join more than a hundred fact-checking organisations worldwide to address the circulation of falsehoods about the virus by cross-checking information. The infodemic has even stoked the debate over legally curbing the spread of fake news in Spain. On the one hand, some have defended this idea because the right to information is based on the transmission of proven facts and that the spread of lies carries legal responsibilities (Carrillo, 1998). On the other hand, there are warnings that the judicial persecution of hoaxes can be an excuse to restrict our freedoms and justify and legitimise the implementation of means of controlling the public, which is hardly compatible with democracy (Zizek, 2020).

Examples of coronavirus-related fake news have been varied: ranging from its emergence being caused by 5G technologies to this virus actually being a biological weapon deployed by China or the United States to extend their global dominance, to helicopters indiscriminately dropping chemicals over cities to eradicate the plague or a wide variety of treatments and remedies. Generally speaking, covid-19-linked hoaxes can be grouped into four major blocks: the causes of the appearance of the virus, the disease itself (symptoms, transmission and consequences), treatments and ways of curing it and, finally, the intervention and actions of the public authorities in the face of this crisis.

Digital platforms have been the main channels through which fake news about covid-19 have circulated. Social media have been the channels the public has detected most information of this type (Casero-Ripollés, 2020; Scheufele & Krause, 2019). In addition, mobile instant messaging services, amongst which WhatsApp stands out, have played a key role in spreading misleading news about the pandemic (Salaverría et al., 2020). Three causes have made this platform one of the main focuses of the infodemic. Firstly, a notable increase in these applications' use, 76% at the start of the confinement in Spain, according to Kantar Media (Flores, 2020). Secondly, the personal nature of their use, since it is family or friends who send the messages, this circumstance makes

the user believable. Thirdly, the difficulty of identifying the source of such messages due to the application's characteristics. According to the leading data verification portals, requests to check the falseness of information disseminated by this messenger service multiplied by six and reached a thousand daily cases. In fact, 80% of the fake news about the coronavirus circulating in Spain came from WhatsApp (Tardáguila, 2020).

The surfeit of information and the multiplicity of channels they circulate through are at the base of this phenomenon. In the case of covid-19, a social climate of fear, risk, and insecurity must be added. In a context marked by emotionally unstable moods, society is more vulnerable to fake news. The temptation to find out forbidden or hidden information that no one dares to disclose and that power wants to silence, and the scandalous or controversial nature of the messages acts as a lure to capture the public's attention and causes it to fall into falsehoods. With this, the circulation of hoaxes increases in times of crisis, as is the case of this pandemic. In fact, fake news is 70% more likely to be shared by social media users than real news (Vosoughi et al., 2018).

Along with its ability to spread anxiety and confusion amongst the public, misinformation also carries a danger in democratic terms. Fake news has a political dimension since one of its objectives is destabilising society and government institutions, generating confusion and anxiety among its citizens (Waisbord, 2018). The far-right and populism frequently use misinformation in political terms and are the main instigators of this phenomenon (Bennett & Livingston, 2018). Covid-19, by its very gravity and social centrality, has become a pivotal moment for the widespread implementation of disinformation and manipulation strategies by the far-right. These political organisations have resorted to meticulously planned digital campaigns and bots, automated accounts posing as humans. The circulation of these hoaxes pursued two objectives.

In the first place, by eroding and discrediting political and media institutions. In this way, they sought to sow mistrust of the government's handling of the crisis and turn this into public discontentment. In Spain, fake news about the privileges of government members in the pandemic spread, such as that of the president's family having one floor on a public hospital reserved for them. The government was also blamed for concealing the actual number of deaths or, directly, accused of deaths with the hashtag *#Gobiernoasesino* (government killer) in social media. For its part, it was also to try to discredit the non-far-right media to generate mistrust around them. In this way, it aspired to undermine journalistic intermediaries so that their fake messages and news could circulate without filters or alterations and directly impact the public.

The second objective was related to the promotion of the far-right's political agenda. Resorting to disinformation, it sought to shock and capture the public's attention to promote the issues and proposals of their political agendas, placing them at the centre of political debate. Thus, both in Spain and in other European countries, the far-right blamed the Chinese community for creating and spreading the coronavirus, which is in keeping with its rejection of immigration. In this way, during covid-19, fake news, in addition to sowing confusion, aspired to have a political and democratic impact, magnifying animosity towards institutions and the media, promoting the polarisation and

radicalisation of citizens and promoting their political agenda. For this reason, the impact of the pandemic may translate, in the short and medium-term, into a weakening of the social influence of journalism and politics, leading to negative consequences for democracy.

6. THE IMPACT ON RELATIONS BETWEEN JOURNALISTS AND POLITICIANS

The relationship between journalists and politicians constitutes a central element for constructing social reality (Micó-Sanz et al., 2016). The outcome of this interaction depends mainly on the information that reaches citizens and how news is shaped. That affects both the public agenda, what issues are at the centre of public attention, and the process of forming the public's opinions.

Covid-19 has had a remarkable impact on the relations between journalism and politics as it is an event endowed with great social centrality. In particular, it has led to a revival of the control dynamics of information control by political actors, principally the government (Castillo-Esparcia et al., 2020; García-Santamaría et al., 2020).

The communication cabinets and spin doctors are the key elements in enhancing the political control of information related to the coronavirus outbreak. In an atypical context, due to the application of the state of alarm regulations, the limitation of movement and confinement, these actors operated as a critical strategic element in imposing political domination over the media's informative activity. These intermediaries actively developed their shield function (Micó-Sanz et al., 2016) to guide both the thematic agenda linked to covid-19 and, in particular, the frame under which the journalistic account of the virus was constructed.

The mechanism used by the communication cabinets in Spain at the coronavirus outbreak to impose their preponderance was press conferences. Given the obligation to hold them telematically to avoid contagion and keep social distance, a format characterised by pre-screening arrangements was implemented in many cases. In order to formulate their questions, the media had to previously refer them to the cabinets in charge of selecting them and announcing them to the political actor appearing. With this, they could not only avoid uncomfortable questions or questioning off from the messages they wished to convey, but politicians would also know the questions in advance and could strategically design their answers. In addition, journalists could not cross-examine or seek further clarifications. As a result, political actors instituted a high degree of control over coronavirus-related information.

Among those who resorted to this practice were political parties, namely the Partido Popular (PP) or Vox, and public institutions, such as the government of Spain. In the latter case, the secretary of state for communication created a WhatsApp group where journalists had to formulate their questions for the president and the different ministers. Questions were then selected from this body, and the group's administrator formulated them, on behalf of the media, to the politicians in the press conferences. The PP did something similar through its deputy secretary of communication.

This format, linked to a high degree of control over the journalists' reporting, was kept up during the first fortnight after the pandemic outbreak. In the face of reduced professional autonomy, a part of the journalists protested. A group of media led by the newspaper *El Mundo* and made up of *ABC*, *La Razón*, *Ok Diario*, *Libertad Digital* and *Vozpópuli* decided not to participate in those press conferences with filtered questions. On the other hand, several journalists launched the manifesto "La Libertad de Preguntar" (Freedom to Ask). This pressure brought about a substantive change in format. Beginning in early April, press conferences went on to be held by videoconference, allowing journalists to ask live questions, previously non-communicated to the communication cabinet.

Despite the success of the journalists' reaction to this form of political control of the press conferences, their perception is that their work was significantly hampered, mainly by political interests during covid-19. Thus, according to a survey conducted by PRGarage (2020), 80% of Spanish journalists felt they had been misinformed during this health crisis. In addition, photojournalists also denounced the obstacles imposed by the government in obtaining images of the effects of the virus, restricting their access to morgues and hospitals (García, 2020). As a result, covid-19 has revived attempts to control journalistic information given the relevance of this event.

7. CONCLUSIONS

The analysis of these five areas shows that covid-19 has had a considerable impact on journalism. This incidence is ambivalent as it has positive and negative effects that affect different aspects of this sector.

Among the positive consequences, a notable increase in news consumption stands out. In this way, journalistic information has become an essential product furnished with high value as a fundamental mechanism to know the extent and evolution of the pandemic. Traditional media, especially television, have gained significant prominence in this context, achieving a high social centrality. That means a strengthening of journalism and its role in today's society. Covid-19 has also allowed audiences furthest from the news to reconnect with information. In doing so, it has had a beneficial effect in democratic terms.

Among the positive aspects, it stands out that the coronavirus has also promoted the use of new formats and information products, such as infographics or newsletters. With this, it has contributed to improving journalistic quality and connecting with the public. In addition, covid-19 has accelerated the media's digital transformation, promoting teleworking and network organisation by increasing the flexibility and adaptability of the sector. Finally, in this context, the pandemic has increased digital subscriptions. That is expected to encourage the widespread embrace of the paywall in the digital environment.

Despite these reasons for optimism, covid-19 has also brought adverse effects on the evolution of journalism. Hence, the economic paralysis has led to a sharp reduction in advertising investment. This circumstance has been detrimental to newspaper companies, which have seen their business model weakened by the decrease in economic

revenue. Paradoxically, as journalism has become more socially important and higher news consumption figures have never been seen, the greater is the economic fragility affecting the media.

This situation has resulted in a deterioration of journalists' working conditions. Coronavirus has brought layoffs, workforce restructuring and precariousness to the sector, adversely affecting journalistic employment. That poses a serious threat to guaranteeing news quality at a time when this is more necessary than ever.

Finally, covid-19 has also had adverse effects on the democratic role of journalism. On the one hand, it has revived the political control mechanisms of the news and journalistic work, especially through press conferences with pre-screening. With this, the professional autonomy of journalism has been curtailed. On the other hand, the coronavirus outbreak has led to an extraordinary increase in fake news to the extent that it is described as an infodemic. That has generated alarm, confusion and fear among citizens, causing instability and mistrust. In addition, the health crisis has been used by the far-right to push disinformation in order to erode political and journalistic institutions and promote their political agenda. That is something that, in democratic terms, holds a serious danger.

In any case, the existence of these positive and negative effects demonstrates the disruptive power of covid-19 on journalism. Our objective has been to present a panoramic and comprehensive approach to the incidence of the pandemic, allowing an initial diagnosis to be formed. However, analysing its evolution will be necessary to gauge the long-term influence of the coronavirus on the transformation of journalism.

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WITH THE NEWSROOM AT HOME: ROUTINES AND TENSIONS OF WOMEN JOURNALISTS IN TIMES OF COVID-19

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ABSTRACT

This article identifies the routines and working practices of women journalists from Colombia and Venezuela in the framework of the health emergency caused by covid-19 in the countries where they work. It is a quantitative research at a descriptive cross-sectional level in which an instrument made up of 26 questions organized into five categories of analysis was used. Categories include family-work relationship, working life, and health and well-being, and the questionnaire was applied to 110 professionals from Colombia and Venezuela. It was found that the compulsory confinement hastened the insertion of journalists in the use of information and communication technologies, applications, and software for content production. Although they were already working in digital media, they had to develop new skills in this field. For 47% of them, their working hours were extended for more than 3 hours a day, which for 79% represents family tensions, given that 38% have underage children or older adults under their care. However, during the confinement, their participation in the formation of public opinion was also expanded through their personal social networks, incorporating corruption issues and citizen complaints. Regarding their routines, it is concluded that the pandemic transformed access to information sources, newsrooms, and, therefore, the dynamics of news production, so we are faced with a new way of doing journalism that puts reporting and ethics into tension with information and communication technologies.

KEYWORDS

women, journalists, covid-19, routines, work practices

COM A REDAÇÃO EM CASA: ROTINAS E TENSÕES DE MULHERES JORNALISTAS EM TEMPOS DE COVID-19

RESUMO

Este artigo identifica as rotinas e práticas de trabalho das mulheres jornalistas na Colômbia e na Venezuela no contexto da emergência sanitária da covid-19 nos países onde trabalham. É uma investigação quantitativa a um nível descritivo transversal, na qual foi utilizado um instrumento composto por 26 perguntas, organizadas em cinco categorias de análise, que contemplam a relação família-trabalho, a vida profissional, e a saúde e o bem-estar. O questionário foi aplicado a 110 profissionais na Colômbia e Venezuela. Verificou-se que o confinamento obrigatório apressou a adesão das jornalistas às tecnologias de informação e comunicação e a aplicações e software para a produção de conteúdos. Embora já trabalhassem em meios digitais, tiveram de desenvolver novas competências neste campo. Para 47% dessas jornalistas, o horário de trabalho foi estendido por mais de 3 horas ao dia. Isto colocou tensões familiares a 79%, dado que 38% têm crianças menores ou adultos mais velhos sob o seu cuidado. No entanto, durante o confinamento também aumentaram a sua participação na formação da opinião pública através das suas redes sociais pessoais, incorporando questões de corrupção e queixas dos cidadãos. A pandemia transformou o acesso às fontes de informação, às redações e, portanto, alterou a dinâmica da produção de notícias. Estamos perante uma nova forma de fazer jornalismo, que coloca a reportagem e a ética em tensão com as tecnologias de informação e comunicação.

PALAVRAS-CHAVE

mulheres, jornalistas, covid-19, rotinas, práticas de trabalho

1. INTRODUCTION

The health emergency caused by covid-19 has reconfigured the world of everyday life. The transformations in the labor dynamics that were about to take place ended up being implemented in various areas where, despite the efforts of governments and companies, they were progressing in a pachydermic way. In journalism, the internet and social networks had already allowed the reconversion of labor dynamics and media companies (Campos-Freire et al., 2016). The access to large amounts of data (Arcila-Calderón et al., 2016), and the use of these as sources (Renó & Renó, 2015), were normalized as strategies in the construction of media information, despite the ethical complexities that this implies (Díaz-del-Campo-Lozano & Chaparro-Domínguez, 2018).

Faced with this digital ecosystem, which challenges journalists in practice and training (López-García et al., 2017), we wonder if the mandatory confinement led to the alteration of family dynamics and the appearance of new routines and practices in this profession, specifically for women, whose low presence in the media has been proven to be linked to difficulties in reconciling their work and personal life. In his studies, Barrios and Arroyave (2007), Carreño-Malaver and Guarín-Aristizábal (2008), and Liao and Lee (2014) point out that female journalists noticed a significant difference compared to the exercise of their profession according to their marital status, emphasizing the sacrifice of their personal life and family, in front of his role as a journalist. They warned that meeting

the requirements of the work and family scenario ends up affecting their mental and physical health.

Twenty-five years after the Beijing conference, improvements in the conditions of women journalists and their representation in the media have not been achieved. In Latin America, studies on women and journalism are traversed by analyzes of the underrepresentation of women as sources or in the process of production and circulation of information (Fernández-Chapou, 2010; Torres & Silva, 2010; Valles, 2006). The report of *Comunicación e Información de la Mujer, AC* (2009) pointed out that in only 10% of the news that circulates in the world's media, women are the central focus. The voices and feminine points of view have a marginal presence. That is, there is an underrepresentation of 17%. This situation is exacerbated when the media in one country report on events that impact women in another country (Geertsema, 2009).

According to the *Global Media Monitoring Project* report (Macharia & Lee, 2017), women-only report 37% of the news stories in newspapers and news programs on television and radio. This figure, says the report, has not changed in 10 years, although the averages by continent fluctuate as follows: plus seven points in Africa to minus six points in Asia. From 2000 to 2015, the gap narrowed in Latin America (plus 14%) and Africa (plus 11%). The other continents registered single-digit changes, except for Asia, where the situation was unchanged. It is striking that the proportion of women reporting journalistic notes fell in all subjects except science and health, where there is proportionality.

Research on the possible feminization of journalism (Rivero-Santamarina et al., 2015) has made it clear that despite the increase in women in the faculties of information sciences, social communication, or journalism, the effective presence of these in the mass media does not compare with the number of graduates.

Women end up dedicating themselves to other professional areas with less exposure to the public sphere, thus reducing the possibility of influencing content and narratives where their voice is clear or giving a voice to other women (Mellado et al., 2007).

Therefore, there is a need for women, not only in journalism but in all professions, to take over the public sphere, overcoming the habit of "keeping them private, discreet, allowing them an open and explicit insertion in society, for joint decision-making", (Bohórquez-Pereira et al., 2020, p. 90).

It is speculated that female journalists were hired solely to meet the needs of the market and the development of the industry in the journalistic companies of the 1990s (Liao & Lee, 2014).

About beliefs and perceptions about gender roles in journalism, de-Miguel-Pascual et al. (2019) found that subtle forms of discrimination are evident. Spanish journalists, for example, consider that their work "is constrained by business decisions, censorship, politicians and pressure groups" (p. 1829).

This article identifies the routines in which women journalists from Colombia and Venezuela have been immersed since the covid-19 health emergency. Furthermore, it

determines the effects on professional practices due to the quarantines imposed by the governments of the countries where they work.

1.1. WORK ROUTINES AND PRACTICES IN JOURNALISM

Studies on news production or newsmaking were carried out in the United States from the 1970s. The empirical works and subsequent theorizations of Tuchman (1983, 1999), Wolf (1997), Molotch and Lester (1974), Bohjere (1985), McQuail (1998), and Reese and Ballinger (2001) contributed to the construction of a conceptual framework that in Latin America has had its developments in Mexico and Argentina, mainly (Stange-Marcus & Salinas-Muñoz, 2015). Other researchers such as Rodrigo-Alsina (1989), De-Fontcuberta (1993), López (1995), and Borrat (1988) have analyzed the productive routines in the media, sure that they are a direct influence on the content of the information (Retegui, 2017).

Newsmaking studies journalistic practices, differentiating them from the study of journalistic discourse. That is, it assumes production and product (the news) as two independent processes. Routine is understood as the concrete journalist's operation in his or her individuality and journalistic practices, such as searching and collecting information concerning the sources and evaluating the event against newsworthiness criteria.

Understanding news production as a complex process and journalistic routines as a social practice imply apprehending how they dialogue and interrelate with external material factors that influence their configuration (Stange-Marcus & Salinas-Muñoz, 2015).

Benavides (2017) assumes newsmaking "as a process of construction of social reality that involves work disciplines, conceptions of time and space, ideological notions and cultural and professional habits" (p. 32).

On the other hand, when referring to routines, Retegui (2017) explains that these do not refer exclusively to the rules the style manual establishes but to internal and flexible processes that are put into use in newsrooms and tend to be modified in the face of the last-minute event. Thus, news production is complex, with diverse factors leading journalists to move between tensions/negotiations around that product.

The journalistic routine is then understood as an internalized, institutional and repetitive action and exhibits a social character since the production of the news is subject to permanent exchange and negotiation between professionals within their organizations and between the media (Stange-Marcus & Salinas-Muñoz, 2015). Then again, based on the search and collection of information, journalistic practices define the journalist's relationship with his sources; such relationship materializes infrequent and highly institutionalized areas (McQuail, 1998).

Selecting the sources is then seen as a natural, automatic, and instinctive process based on the experience and criteria of journalists and editors. It is a skill that, little by little, they share with their peers; hence the importance of the rooms and editorial boards, since these spaces are recognized as scenarios for socialization and the exchange of

positions and perspectives around a topic or event that can be considered news. Currently, the search and verification of information, two fundamental elements of journalism, are affected by the computational dimension that opens a gap between journalists with technological preparation, capable of practicing this new way of doing journalism, and those who do not have that training and are limited to perform the tasks imposed by digital media or in transition.

In this sense, the technological dimension will have more weight in journalism, which is why different journalistic currents will emerge, whose current practices are grouped as movements or specialties: multimedia journalism, data journalism, immersive journalism, or transmedia journalism (López-García et al., 2017).

1.2. WOMEN JOURNALISTS IN LATIN AMERICA: UNDERREPRESENTATION AND DAMAGES TO THEIR ROUTINES

Since the 19th century, there has been a long tradition of female presence in the media. Latin American women and writers of that century divided their time between writing and directing or participating in weeklies. The Peruvian Clorinda Matto de Turner directed *El Perú Ilustrado* and was ex-communicated because she published a story by Brazilian Henrique Maximiano Coelho in which an earthlier Jesus appears and is interested in María Magdalena (Guardia, 2007). In his book *Letras Femeninas en el Periodismo Mexicano* (Female Letters in Mexican Journalism), López-Hernández (2010) makes a journey from 1873 and lists the investigations that have been developed on the subject, concluding, at the time, that the studies reach 1917 with the work carried out by Hernández-Carballido (2011) regarding the participation of women in journalism during the Mexican revolution.

On the Colombian written press, the investigations of Melo (2017), Gil-Medina (2016), Alzate (2003), and Londoño (1990) report their participation in newspapers and magazines aimed at the fair sex (as the feminine was called). However, a feminist struggle in the current sense of the word did not develop, but it made a significant contribution to raising awareness about the condition of women. Similar processes stand out in Mexico (Lever-Montoya, 2013), where women journalists face obstacles in joining the national media after working in their own or someone else's newspapers.

In Venezuela, for example, monitoring the presence of women in the press has Joaquina Sánchez, who is actively involved with the media, after acting in politics, as a reference (Ramón-Vaello, 1985). *El Rayo Azul*, a literary weekly produced in 1864 in the state of Zulia and edited by Perfecto Jiménez, is identified as the first to initiate women into journalism by accepting female collaborations. The Venezuelan women had probably already participated in the national press, but no data was found before the Zulia weekly.

Finally, there are difficulties in tracking the presence of women journalists between the 1930s and 1980s in Latin America. In Colombia, the study by Carreño-Malaver and Guarín-Aristizábal (2008) identified the position, origin, and journalistic practices of women in Colombia from the second half of the 20th century to the first decade of the

21st century. They found that the practices and routines of journalists are affected by the myth of beauty, motherhood, marriage, and bullying by bosses, colleagues, or sources. Becoming a mother, for example, is a process that affects the professional life of any worker with very demanding schedules, but in journalism, it can become an obstacle.

Their study revealed the existence of tensions in the relationship between gender, journalist, and source, since “the strategy of seduction, understood as a way to captivate and gain trust, is a weapon that depending on the journalist, can help in the search for the information” (Carreño-Malaver & Guarín-Aristizábal, 2008, p. 84). In this same sense, the Fundación para la Libertad de Prensa, through the investigation carried out with journalists in various regions of the country, found that 40% of the women consulted manifested differential treatment in journalism due to their gender (Jules, 2017).

Regarding the effects on journalistic routines in male and female professionals for three Latin American countries, Gutiérrez Atala et al. (2015) determined that both in Chile, Colombia and Argentina, the transformations and vicissitudes interfere in their work and constrain their professional performance, limiting the expected social role in a democratic system.

In Ecuador, Rosales and Barredo (2014) found that in 62% of women surveyed suffered harassment, the figure “reflects a type of structural violence in women ‘s journalism in the city” (p. 93). Regarding sports journalist women in Quito, Cevallos-Rueda (2019) noted that their routines are conditioned by ideological, hierarchical, labor issues, and social pressure. To save them, they care about continuous and self-taught training, reading books, other news, and the use of social networks.

For its part, Retegui (2018) found that the participation rate of women in Grupo Clarín’s (largest media conglomerate in Argentina) processes is as follows: 13.3% of women hold a managerial position at Clarín/Agea. In the news department (Clarín/Artear), only 10% of the journalists are editors, this being a middle-ranking position since it is behind the section chiefs. However, the scenario improves for heads and executive productions in the news since women manage 20% of these areas. Despite this figure, it was determined that 67% of the graphic journalistic sector is found in sections or soft products, areas understood as having a lower editorial hierarchy, and/or where themes of tradition to the female domain are addressed.

In turn, Amado (2017) determined that journalists have minority participation in Argentine media, although newspapers promote more egalitarian plants than television, for example.

Cepeda (2020), in his study on the situation of journalists in Tamaulipas, Mexico, found that the flexibility that women require to practice journalism, be mothers, and climb the job ladder does not exist in the media structures of the newsrooms. The precarious wage adds to this. In his research, he found that the wages of women journalists are between 1.8 and 2.5 times and less than those of their US peers, although they work more hours or have graduate degrees.

Added to this, in Latin America, these professionals also face the risks of threats and deaths. Although it is clear that the homicide rate has reflected regional violence perpetrated against young men and urban contexts, there are warnings about the increased femicide and pressures to journalists (De-Frutos, 2016). Furthermore, the attacks on them are usually related to other series of legal, socio-cultural aspects and not to the exercise of their profession.

2. METHODOLOGY

This article aims to identify the routines women journalists from Colombia and Venezuela have been immersed in during the covid-19 health emergency and determine the impacts of the quarantines imposed by governments in the countries where they work in their professional practices.

2.1. TYPE OF RESEARCH

For the development of this research, the quantitative approach was used at a descriptive cross-sectional level (Hernández-Sampiere et al., 2010) since the data is collected directly from the primary source without the researchers performing manipulation processes on them. The provision of the data occurs within a period between 60 and 80 days after the mandatory preventive isolation in Colombia begins. Finally, descriptive statistics are used to characterize the variables under study as well as possible.

2.2. POPULATION AND SAMPLE

The population is made up of all women journalists from Colombia and Venezuela¹. Non-probability sampling is implemented for the conformation with the sample. The procedure followed by the researchers to collect the data was as follows:

1. The link to access the survey was sent via email, accompanied by a message explaining the motivations for the investigative process, and the informants were invited to fill out the format.
2. This email was sent to the official addresses of: Círculo de Periodistas de Bogotá; Red de Radios Universitarias de Colombia; Red de Emisoras Comunitarias de Norte de Santander; Círculo de Periodistas de Norte de Santander; Colegio Nacional de Periodistas de Venezuela and Círculo de Periodistas de El Táchira².
3. The time window for data collection was kept at 20 calendar days, reaching 110 completed surveys, and that amount corresponds to the sample size.

¹ There are no statistics on the number of journalists in Colombia or Venezuela.

² Norte de Santander (Colombia) and Táchira (Venezuela).

2.3. AN INSTRUMENT FOR DATA COLLECTION

As for data collection, the survey was used as a suggested instrument for diagnostic characterization in social studies (Falcón et al., 2019). The instrument had 26 items distributed in five categories described in Table 1.

CATEGORIES	DESCRIPTION	INDICATORS
Demographic profile	Corresponds to those characteristics of the informant	Nationality, the country where you work, and marital status
Family and work relationship	Groups various aspects of the personal and family environment	Has children, elderly or disabled people living with them, has been pressured to change jobs, has received support in carrying out housework
Context	It aims to find possible relationships between journalism and the health emergency	In the country where she works, measures have been taken to mitigate the impact of covid-19 and since when
Laboral life	It allows you to know the work context and find relationships between your professional and family life	<i>Medium</i> in which works as a journalist, a position she has held since the beginning of the health emergency: her workload has increased, she has been able to practice her profession, as usual, has visited her office, her functions have been modified, skills that she has acquired, technological resources used to carry out work, she has received protection elements, has thought about resigning, has received bonuses
Health, wellness, and new routines	It aims to identify the aspects associated with the incorporation of new healthy routines	She has received training for the development of her profession, has explored other means of expression with the support of information and communication technologies, activity in social networks, and in what specific topics

Table 1 Description of categories

Since the researchers proposed the instrument, expert judgment used content validation (Bohrstedt, 1976). A panel of five people was formed, three social communicators and two experts in statistics. During three 2-hour sessions, the panel members analyzed each of the categories to be measured and their indicators, reviewing the wording of each item together with the possible response options.

2.4. PROCEDURE AND DATA ANALYSIS

Once the observation window for data collection had been completed, the Google form's Excel file was downloaded. The data were reviewed in search of possible anomalous responses to be later coded and exported to SPSS version 25. Software in which the respective statistical analyzes were carried out.

3. RESULTS AND DISCUSSION

Regarding the demographic profile, 73% of the informants are of Colombian nationality and in Colombia, while 26% are of Venezuelan nationality practicing the profession in Venezuela, Chile, the United States, Peru, and India. The remaining 1% are native and practice their profession in their country, from Honduras or Argentina.

The percentage difference between the respondents from Colombia and Venezuela is associated with the distrust among Venezuelan journalists, who still reside in their country, to answer questionnaires about their private and work life. There are fears of being linked to the opposition and being sanctioned by the regime or vice versa. In fact, of that 23% who agreed to participate in the research, the percentage of Venezuelans practicing abroad is 50%.

To marital status, it is highlighted that 55% are single, while 25% are married, and 15% live in the common law. The remaining percentage are separated, and one of them is a widow. Faced with the majority of single women, Liao and Lee (2014) found in their study carried out in Hong Kong single women journalists and recognized for their strong commitment to professional ethics. That confirms the complexity professionals are immersed in when building a family life in Colombia, Venezuela, and China.

Regarding the family and work relationship, 42 affirm that they are responsible for one or two minor children, but 34 of them have at least one older adult under their guardianship, and five say that they are also responsible for the needs of a person with a disability.

From Table 2, it can be highlighted that approximately 21% of the informants state that during the health emergency, they have not received pressure from their family to leave or change jobs, even though 13% of them have not had support for the performance of household chores. The remaining 79% have received pressure from the family to exercise their work, although 43% have had support personnel to carry out the housework.

		BEFORE AND DURING THE HEALTH EMERGENCY, HAVE YOU HAD STAFF TO SUPPORT YOU IN YOUR HOUSEWORK?			
		No	Yes	Only during the health emergency	Total
DURING THE HEALTH EMERGENCY, HAVE YOU FELT PRESSURE FROM YOUR FAMILY TO LEAVE OR CHANGE JOBS?	Yes	32.7%	42.7%	3.6%	79.1%
	No	12.7%	8.2%		20.9%
	Total	45.5%	50.9%	3.6%	100.0%

Table 2 Housework and pressures

In this sense, Lobo et al. (2017) found in their research with Portuguese journalists that, despite the normalized belief of gender balance in newsrooms, the truth is that

women journalists find restrictions when managing demands family and work, on account of working hours and activities of the profession.

Regarding working life, it was identified that the media with the highest female performance are digital, followed by radio and newspapers. The web portal stands out regarding virtual media, followed by virtual radio and television broadcast on social networks.

Those who concentrate their work on the radio are in the public interest media that correspond to the stations of universities, government institutions, and police and military forces in Colombia. Professionals who work in newspapers divide their work into print and digital, given the migration of the media, but with double responsibility for journalists.

Finally, 19% of the informants affirm that their work activities focus on managing institutional portals and communication media of non-governmental organizations or universities. Others perform teaching functions, and some create content for independent or specialized media.

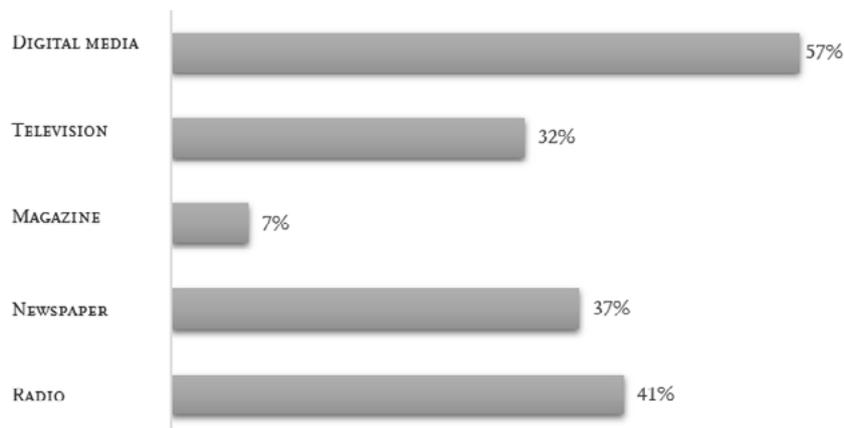


Figure 1 Media in which they carry out journalistic work

When inquiring about the position they occupy in the companies where they work, it was determined that 72% assume journalistic functions, 11% are directors, 5% are editors, and the remaining percentage occupy other roles such as communications analyst, coordinator of digital projects, head of press and protocol, announcer, presenter or producer.

When determining the effects derived from compulsory social isolation, 76% of the informants maintain that during this time of health emergency, the workload has increased, an aspect that has been reflected in the increase in the number of hours needed to carry out their work, where 29% have required between 1 and 3 hours, while the remaining percentage say that daily they demand more than 3 additional hours of work.

In this line of analysis, many work activities have had to migrate to the option of teleworking as a result of compulsory social isolation, and journalism has not been the exception. Inquired about this issue, approximately 83% of the informants recognize that the health emergency forced them to this job option, and 60% of them have not returned to their jobs since the pandemic, which affected their work functions, and 43% of them had to adjust.

The previous manifested in the increased number of sources to cover while adding tasks such as making videos, taking photographs, and designing infographics, among the most relevant and common activities. Three cases state that they were demoted from their positions, while in four cases, they affirm that necessity contributed to their promotion.

It is evident that, when switching to the telework option, many of the tasks carried out acquired more significant influence from information and communication technologies since digital media were used for content communication. For this reason, the informants were asked about the skills they had to acquire to carry out their activities during this period of the health emergency, highlighting in 90% of the cases the use of the various platforms with their respective applications, followed by graphic design and websites, among the most prominent. In this sense, women journalists from Colombia and Venezuela who had not leaped into the digital ecosystem ventured into this scenario, putting themselves in tune with international trends and accepting the transformations.

As proposed by Renó and Renó (2015), these transformations occur in the dynamics of the construction of the journalistic discourse: language, processes, relationship with sources (social networks), and a new newsroom. Other skills developed on behalf of covid-19, but less frequently, are audio and video editing, technical support of broadcast equipment, design of strategies, and virtual campaigns or live coverage.

According to López-García et al. (2017), the current journalist is required to have a versatile profile that includes from the use and management of social networks, the business management of their company (Campos-Freire et al., 2016), or the mastery of technological tools for the construction of narratives that lead to innovative newsrooms typical of the mobile communication revolution.

In the practice of journalism, the search for information from various sources is standard. Due to the declaration of mandatory social isolation, crowds of people were prohibited, and many activities were reduced to groups of five attendees. Informants were asked if their sources refused to carry out face-to-face interviews in this search for information, determining that in 8% of the cases, this situation has occurred, mainly government authorities, public figures, or health professionals who have refused to carry them out in person.

Furthermore, 30% say that in the development of their functions, they do not need to go to sources, while 61% argue that the interviews are carried out by phone or through virtual channels such as WhatsApp, Meet, Zoom, Skype, Facebook Live or Hangout among the most used.

At the beginning of the mandatory social isolation, many companies sent their workers on vacation to mitigate the economic effect of this measure. The informants were asked if they had had days of rest in this period of a health emergency before which 54% affirmed that they had had the usual days of rest. In contrast, in the remaining percentage, the opinions were divided. Some affirmed they had enjoyed more days than usual (12% of the cases), others say they have fewer days (18% of the cases), and 16% of them affirm they have had to work without rest during all this time.

The employers' commitment was to provide their workers with the necessary protection elements to avoid the spread of covid-19. Moreover, 40% of the informants affirm that they have received supplies from them such as gloves, face masks, masks, antibacterial gel, and in sporadic cases, antiseptic alcohol or a digital thermometer; While of the remaining 60% who did not receive them, 50% claim to have bought them with their resources, while 10% have given them as gifts.

Advancing in the informants working conditions analysis in this time of health emergency, approximately 30% of them have thought about quitting their job at this time. In comparison, the remaining 70% say that resigning would not be an option, and with greater determination, 9% of them say that they have benefited from additional bonuses for their work performance during these difficult times.

Finally, when inquiring among the informants if they felt fear of being infected by covid-19 during their work functions, 57% state that they have this fear in contrast to 43% who are sure that this cannot happen. They mainly comply with the prevention indications, such as not leaving the house or using all protective implements if they must go out. It is worth noting that journalism has always been assumed as a high-risk profession (De-Frutos, 2016).

3.1. HEALTH, WELLNESS, AND NEW ROUTINES

The interest in knowing the aspects of health training and if it has incorporated new media routines related to this topic led to the determination that approximately 65% of the informants have not considered entering as a youtuber, instagrammer, or blogger as a complement to their activity conventional labor (Table 3).

ANSWER OPTIONS	FREQUENCY	PERCENTAGE
No	72	65.4%
Yes	25	22.7%
I already did it before the health emergency	13	11.8%
Total	110	100.0%

Table 3 You have decided to enter as a youtuber, instagrammer, or blogger

Those who affirmed that they have ventured as youtubers, instagrammers, or bloggers have thought about a diverse range of topics: cooking, care of children or pets, environmental movements, health and well-being, makeup, healthy lifestyle habits, among others. According to Liao and Lee (2014), this situation explores how some journalists perceive specific topics as exclusive to women because they value their femininity.

To be able to relate the journalistic exercise with the measures implemented during the health emergency. When inquiring among the informants whether the countries where they work had implemented measures to mitigate the impact of covid-19, it was determined that the response was positive in all cases. There was a diversity of opinions in the implementation of these measures. For example, Colombia is the first country to start these contingency measures, followed by Peru, India, Venezuela, and the United States.

Concerning training about covid-19 and its implications on their work, 70% affirm that they have not received any information (Table 4).

ANSWER OPTIONS	FREQUENCY	PERCENTAGE
No	77	70.0
Yes	33	30.0
Total	110	100.0

Table 4 Has received training in the framework of covid-19

Those who claim to have received training on covid-19 have had all kinds of sources of information and instruction, the most notable being the insurer of occupational risks, digital media, or training generated by the Ministry of Health. According to the results of a survey carried out by Red Colombiana de Periodistas con Visión de Género (Red Internacional de Periodistas con Visión de Género – RIPVG, 2020), when asked if, during the health emergency, they had suffered physical or mental health problems, 50% of the respondents admitted physical complications and the other 50%, that mental.

When asked if they had become more active in social networks (Table 5), 100% affirmed they did. They claim to spend more time reviewing and publishing the status of WhatsApp, Facebook, or Twitter, on personal issues, complaints about citizens, or manifestation of political positions. However, issues such as mental health states or the promotion and prevention of covid-19 arise less frequently.

	CITIZEN COMPLAINTS	OTHER	POLITICAL POSITIONS	PERSONAL TOPICS	TOTAL
WhatsApp	14.3%	3.8%	6.1%	9.9%	34.1%
Facebook	7.3%	2.2%	4.8%	8.6%	22.9%
Other	3.2%	1.0%	2.2%	6.1%	12.4%
Twitter	9.9%	2.9%	5.4%	7.6%	25.8%
Pinterest	1.0%	0.6%	0.6%	1.3%	3.5%
Snapchat	0.3%	0.0%	0.3%	0.6%	1.3%
Total	36.0%	10.5%	19.4%	34.1%	100.0%

Table 5 Contingency table between social networks and thematic consulted

According to Renó and Renó (2015), the use of social networks enables journalists of the 21st century to discover various information, which before they had no possibility of access unless it was revealed directly by the source, and homologate the fact of working without social networks to do it without a typewriter in the 40s of the 20th century. Furthermore, women journalists find the possibility of publishing information that has no place in the media where they work in personal social networks. In his study, Mojica-Acevedo et al. (2019) on women journalists as opinion leaders concluded that they allow them to deliver information in a more agile way and from their position. Thus, they enable the debate and summon their audiences to participate in various issues, especially equity and gender.

4. CONCLUSIONS

The results allow us to affirm that the health emergency caused by covid-19 has transformed the professional routines and practices of women journalists in Colombia and Venezuela, directly affecting the number of hours (between 9 and 13 hours a day), but did not represent a salary increase. This situation has generated family tensions since, to the professional practice, confinement adds the direct and permanent care of children, the elderly, or people with a disability in charge. However, resigning is not an option for these professionals, even though they have suffered family pressure to leave their jobs.

There are no positive actions by journalistic companies to promote equality or gender equity within them. Instead, the results conclude the deepening of these inequalities in terms of workload due to the increased number of sources assigned. However, the study reveals that women journalists have taken advantage of social networks and instant messaging applications to express their opinions on issues such as corruption and citizen complaints, which has opened up the possibility of interacting in channels other than their communication media. Thus, they give greater visibility to their voices and configure spaces for the generation of public opinion, which are restricted to them in the exercise of their journalistic work.

The health emergency has also caused the need to acquire more digital skills not to be left out of the labor market. Women journalists ventured into the use of platforms and applications to find information and graphic design to circulate it, which reiterates the urgency of the transformation of curricula and the construction of new graduate profiles in communication programs and faculties and Journalism, as well as the development of competencies for multidisciplinary dialogue, allows them to move in diverse and flexible but remote, information production circuits.

Confinement and the impossibility of accessing sources personally transformed access to information in the Colombian and Venezuelan context, which hastened the development of new practices within journalism that had already been found with social networks and big data in other countries. Nevertheless, this practice will require an

ethical exercise in collecting information. In the digital or information and communication technology mediated process, it remains in official sources or circulates on the network, leaving direct contact with the protagonists out of the facts, ordinary citizens, as well as journalistic investigation through immersion or observation of the surroundings, necessary, for example, for the chronicle and the report.

The women journalists reported that they did not return to the newsrooms during confinement, although mobility restrictions excluded journalists in both countries. It worries then, that is outside the context of the newsroom where learning about practices and tensions is given in the face of closing hours, organizational processes of journalistic companies, and relationships with editors and bosses, one is facing the appearance of a new relational ecosystem that they were already facing, freelancers, for example. The information production process will undergo transformations that will push journalistic ethics to the limit.

We are facing one of the most significant changes in modern journalism. Will post-covid-19 journalism be a process where individuality in the production of information (typical of routines) will take on new meaning? Where perhaps there is greater polarization, less consensus, but also less organizational tensions?

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POTENTIALITIES OF PODCASTING IN HEALTH JOURNALISM — AN ANALYSIS OF THREE PODCASTS ABOUT COVID-19 IN PORTUGAL

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ABSTRACT

The pandemic caused by covid-19 was a lever for the appearance of several podcasts dedicated to the disease. In several countries, including Portugal, the media added audio content to their traditional information offering by using this digital tool. The podcast's popularity has grown with audiences, and media companies look to this platform as a good strategy to diversify content and thus reach audiences. In times of crisis, such as a pandemic, the need for populations to access credible information they can trust and thus gain knowledge to help them make decisions increases. In this particular case, covid-19, the populations felt the need to be informed about an unknown disease, looking for information about symptoms, contagion, or means of personal protection, and podcasts represented an answer to these information needs. This article examines how three Portuguese podcasts dedicated exclusively to covid-19 treated the disease. Based on the data, we will reflect on the importance of this new tool for health journalism. The results of the research allow us to conclude that the national podcasts on covid-19 analyzed follow some patterns identified in the coverage of health topics in Portugal and that, adopting an "advisory" tone, they placed themselves in the position of supporting tools in combat the pandemic by clarifying, informing and clarifying issues related to the disease.

KEYWORDS

health journalism, podcast, pandemic, covid-19, Portugal

POTENCIALIDADES DO PODCASTING NO JORNALISMO DE SAÚDE — UMA ANÁLISE A TRÊS PODCASTS SOBRE A COVID-19 EM PORTUGAL

RESUMO

A pandemia provocada pela covid-19 foi uma alavanca para o aparecimento de vários podcasts dedicados à doença. Em diversos países, incluindo Portugal, os *media* acrescentaram à sua oferta informativa tradicionais conteúdos sonoros utilizando para tal esta ferramenta digital. A popularidade do podcast tem crescido junto das audiências e as empresas de comunicação social olham para esta plataforma como uma boa estratégia para diversificar os conteúdos e assim chegar junto dos públicos. Em momentos de crise, como uma pandemia, cresce a necessidade de as populações terem acesso a informações credíveis nas quais possam confiar e, assim, obterem um conhecimento que as ajudem a tomar decisões. Neste caso em particular, a covid-19, as populações sentiram a necessidade de estarem informadas sobre uma doença desconhecida, procurando informações sobre os sintomas, o contágio ou os meios de proteção pessoal e os podcasts representaram uma resposta para essas necessidades informativas. O presente artigo

analisa como três podcasts portugueses dedicados em exclusivo à covid-19 trataram a doença. A partir dos dados procederemos a uma reflexão sobre a importância desta nova ferramenta para o jornalismo de saúde. Os resultados da pesquisa permitem-nos concluir que os podcasts nacionais sobre a covid-19 analisados seguem alguns padrões identificados na cobertura de temas de saúde em Portugal e que, adotando um tom de “consultório”, se colocaram na posição de ferramentas coadjuvantes no combate à pandemia, ao esclarecerem, informarem e clarificarem questões relacionadas com a doença.

PALAVRAS-CHAVE

jornalismo de saúde, podcast, pandemia, covid-19, Portugal

1. INTRODUCTION

The pandemic caused by the new coronavirus has generated a greater need for information about the disease, mainly because this is a new virus, and some of its symptoms and effects are unknown to the scientific community.

The demand for information by the citizens was matched by the media production, generating a sometimes chaotic context, such as the volume of news produced and made available in the public space. In this equation, we must not overlook the emergence of fake news about the pandemic that led to growing concern in the fight against the disease.

For this reason, the information produced in the media context gains relevance, within which journalists exercise their function according to a regulated framework and defined editorial policies. This aspect should be valued as people seek credible information about a fundamental area of citizens' lives: their health. Thus, journalism plays a vital role in people's health literacy (Azevedo, 2012; Levin-Zamir & Bertsch, 2018; Magalhães et al., 2017), to the extent that it can provide credible and useful information for each individual to make decisions to promote a healthy life.

In a pandemic scenario, the concerns of the populations are focused on the symptoms, the contagion, the cure, and the behaviors and, in this sense, journalism plays a vital role as a credible information agent supporting health authorities, both in traditional media and in the new digital platforms.

In fact, in addition to traditional media (newspapers, radio, and television), it is now possible to find journalistic content on health on websites, blogs, and social networks (Levin-Zamir & Bertsch, 2018; Schwitzer, 2009).

The present article intends to specifically analyze one of these new tools — the podcast — that grew with the audiences (Newman, 2021) and found in the pandemic context another reason to expand and consolidate its growth (Martins, 2020; Newman & Gallo, 2020).

Our study thus aims to understand how health journalism, concerning the pandemic caused by covid-19, has used this form of audio communication available online. We analyzed three podcasts exclusively dedicated to covid-19, identifying the themes, the voices, and the structure of their episodes and seeking to contribute to how journalism in the field of health can benefit from using this new digital audio tool.

2. THEORETICAL BACKGROUND

Several authors (Azevedo, 2012; Hinnant & Len-Rios, 2009; Hodgetts, 2012; Magalhães et al., 2017) have demonstrated the importance of the media and particularly journalism to convey health information to citizens. For individuals, the media represent a way to disseminate health-related content and have the ability to promote behaviors and practices and lead to the adoption of healthy lifestyles (Azevedo, 2012; Magalhães et al., 2017).

The way we perceive health and disease is largely determined by how the media report these topics (Hodgetts, 2012), as the frequent placement of health-related issues on the public agenda can contribute to the populations' health literacy.

This social responsibility that, as in other areas, is inscribed in the praxis of the journalism profession leads, on the other hand, to a need for training and access to health information by journalists to transmit it in a clear and enlightening way to citizens. In this sense, some researchers (Hodgetts, 2012; Peters, 2000) have noted the existence of a clash of cultures between professional communities: doctors and other health-related professions, and journalists.

This clash is embodied in how both professionals perceive their role in society. Hinnant and Len-Rios (2009) state the following:

while journalists envision themselves safeguarding the democratic process, scientists feel that they do the same for scientific discourse. The former leads to oversimplification of scientific findings so that the public can understand the material, while the latter results in an overemphasis on technical information and the scientific process. (p. 90)

The scientific community values aspects related to the scientific accuracy of the information, while on the journalism side, the priorities are the need to inform the readers, listeners, or viewers. The problem is that, sometimes, this simplification (or decoding of information) can mean a lack of accuracy. The issue is complex and refers to how health news should be presented.

The media are seen “as strategic partners for both improving health literacy and increasing health education outcomes” (Azevedo, 2012, p. 188). Moreover, from this perspective, the idea advocated by Kovach and Rosenstiel (2004) about the function of journalism, which is to provide citizens with information that allows them to make the best possible decisions about their lives, can also be applied to health journalism in particular. In other words, it is up to journalists who work directly with this theme to provide the audiences with relevant information to make decisions and adopt practices and behaviors to promote good health. Azevedo (2012) argues that journalism has the role of “alerting to certain types of risk and behavior and reinforcing processes of change” (p. 189).

Therefore, taking the Portuguese reality as a starting point, it is important to understand how the news coverage of health-related themes has been carried out. Lopes and Fernandes (2012), within the scope of the project *Disease in the News*, identified some trends regarding this coverage. According to the study, “health policies” were the central

theme of news coverage in the analyzed newspapers (*Público*, *Jornal de Notícias*, and *Expresso*), “gathering almost 33% of all published texts” (Lopes & Fernandes, 2012, p. 18).

The study also concluded that the tendency of journalism not to privilege “disease” as a newsworthy subject persists: “updating this diagnosis, the 2012 data do not add any new element, since the total results show that only 33.9% of the articles refer to a specific disease” (Lopes & Fernandes, 2012, p. 21). As noted by the authors of the study, the exception was influenza A, which, in 2009, motivated the publication of several journalistic texts, underlining what had already been referred about the hyper mediatization of influenza A (Lopes et al., 2010).

The study also emphasizes the importance of information sources, and in this case, the official sources, which include “those connected to the political power or who hold management positions in public bodies, always play a major role” (Lopes & Fernandes, 2012, p. 23).

The object of the study we referred was the Portuguese press which, with radio and television, is the leading media through which audiences obtain health news. However, due to a new media ecosystem that now includes digital media and new forms of communication available on the internet (blogs, social networks, podcasts), has the potential to change (Azevedo, 2012, p. 187).

In other fields of journalism, as in the case of health journalism, the internet also has an impact that should be mentioned. According to Gary Schwitzer (2009), based on a survey conducted in the United States with members of the Association of Health Journalists, the new platforms for news created on the internet “have been a mainly positive influence on health journalism (64%, compared to 17% who said the impact was mainly negative” (p. 6).

Levin-Zamir and Bertsch (2018) talk about eHealth literacy to refer to the set of health information available on the internet, therefore, posing new challenges to health literacy and the role of information and communication. The authors argue that eHealth transferred health literacy traditionally generated from communication in traditional media to a different level as it “enables and invites the public to actively interact, respond, and participate in creating, criticizing, and sharing health messages and information” (Levin-Zamir & Bertsch, 2018, pp. 9–10).

Therefore, we start from the assumption that the new digital platforms represent one more way to provide journalistic content in the health area. That is a fact for the podcast, which is the tool we intend to explore in this article.

Ruben Martins (2020) refers that, during the first months of the covid-19 pandemic, 21 podcasts were created in Portugal. Many were not related to the disease but arose due to the lockdown periods the country has undergone. However, as the author points out, several podcasts eventually became extinct after a short time.

The author notes that between March 14 and 21, 2020, “21 original contents were created under the pretext of the covid-19 pandemic, whose general theme or one of the episodes was the sanitary context or the greater temporary availability provided by the quarantine period” (Martins, 2020, para. 2). The contents were produced by media

outlets (*Público*, Antena 1, Antena 3, *Observador*, and TSF) and by independent producers. Regarding the content, the option was following the pandemic's evolution and answering questions in those episodes dedicated to the disease.

The covid-19 pandemic was, effectively, a lever for creating several podcasts either dedicated to the disease or to the effects it caused in the lives of populations, particularly concerning periods of lockdown.

In a search conducted on Spotify, Google Podcasts, and Apple Podcasts platforms and with a purely exploratory purpose, we identified the existence of Portuguese podcasts with topics related to covid-19 produced by media outlets, other institutions, and independent production.

These are the cases of *P24* and *Em Casa* (*Público*), *Perguntar Não Ofende* (produced by Daniel Oliveira who created a special dossier on the subject), *Podcast do Hospital da Luz*, *Vai Ficar Tudo bem* (*Expresso*), *Querida Quarentena* and *Anti-Vírus* (Rádio Comercial), *Conversas Visão Saúde* (*Visão* magazine), *Relatório Coronavírus* and *Covid-19: Perguntas, Perguntas e Efeitos* (Antena 1), *Perguntas Com Resposta* (TSF). It should be noted that from this list, many already existed and were dedicated to various health issues. With the pandemic they also started to address covid-19 in some episodes.

The reality verified in Portugal gains a much larger dimension in other latitudes, such as the United States, France, Australia, Denmark, United Kingdom, and Sweden, whose realities are highlighted in a Reuters Institute study: “dozens of daily news podcasts were launched in March and April, focusing only on the pandemic and its implications” (Newman & Gallo, 2020, p. 21).

The study concludes that the pandemic caused by the new coronavirus generated in the audience a desire for more information on various aspects related to the disease and that this triggered the production of news content in podcast format, particularly in the period of lockdown. In this regard, the authors of the study refer to:

coronavirus appears to have accelerated plans for daily news podcasts, with a number of publishers looking to tap into a heightened interest in news and in deeper coverage. A number of news brands launched “pop-up” coronavirus podcasts during the lockdowns, many of which have become breakout hits. (Newman & Gallo, 2020, p. 6)

3. THE GROWTH OF THE PODCAST SECTOR

A podcast is an audio file available on the internet that has the advantage of being downloadable to a computer or mobile device. That is audio communication, but, unlike radio broadcasts, the podcast is not tied to a temporal logic of the messages. That means that it gives listeners the possibility of listening to a given content when they want and at the time they want, rather than being tied to the rigidity of radio programming.

We don't need some big music company or radio station to make that happen. It could just be some blogger posting a review of the song mix, say, and then attaching an MP3 audio file as an enclosure to it that then, thanks to RSS, is sent and downloaded right into your computer and then to your iPod. (Kline & Burstein, 2005, p. 276)

Its success is explained by the fact that it is free, portable, gives the listener autonomy, and simplifies production processes. The Reuters Institute report, looking ahead to the year 2021, states the following: “podcasts continue to go from strength to strength, despite the pandemic making them available to morning commute one of the most popular times of day for listening” (Newman, 2021, p. 28).

This tool has seduced several fields of activity in its short history, from public entities to companies, including the media. Examples are the Pentagon, NASA (National Aeronautics and Space Administration), religious institutions, companies, schools, universities, radios, newspapers, and televisions.

In addition to these institutions, many amateurs make independent production of podcasts. This scenario motivates some authors to consider this form of communication as a new and more democratic platform (Balzen, 2017; Bonixe, 2006) in the sense that it generated possibilities for citizens without experience or access to the media to be able to express themselves through a digital tool.

In the Portuguese case, podcasting arrived in the first quarter of 2005 by Duarte Velez Grilo, who created *Blitzkrieg Bop* in March. After 2 months, the Media Capital Rádios group started to make opinion programs available on its portal Cotonete. It was the first Portuguese media group to provide radio programs available in this format. Cotonete was also the first national aggregator of podcasts by including the episodes produced within the Media Capital group and the few amateur-produced ones.

In September 2005, Carlos Jorge Andrade created Lusocast, the first directory exclusively for Portuguese podcasting. However, given the low initial expression of podcasts produced in Portugal, Lusocast started by making available programs produced in Brazil. The portal started with about 30, from which the Portuguese produced less than half.

The year 2006 started with TSF radio joining the podcasting and making six programs available. In February of the same year, SIC became the first national television station to make some of its programs available on podcasts. A month later, it was time for *Expresso* newspaper to create press content in the podcast format for the first time in Portugal. This case was an interview conducted by the newspaper with the then Portuguese prime minister, José Sócrates.

Observador, a media website created in 2014, launched its first podcast the following year. “It is 22 seconds heard on Soundcloud in which David Dinis, then executive director, announces two programs with podcast distribution” (Reis, 2018, p. 212). That was followed by *Público*, which, from 2017 onwards, started to provide regular podcast content.

In recent years, the Portuguese media have continued to invest in providing podcasts. These are the cases of *Visão* magazine and *Expresso*, which, through its magazine,

has launched in 2019 an innovative project by making a special fully available edition in podcast format.

According to the *Reuters Institute Digital News Report 2019*, which analyzed several countries, including Portugal, “36% of the audience listen to a podcast every month” (Newman et al., 2019, p. 11). This percentage is slightly lower in the Portuguese case, standing at 34% (Cardoso et al., 2020, p. 28) and with a tendency to grow to “close to 40% in 2020”, according to the Portuguese communication observatory (Cardoso et al., 2020, p. 33).

Technological developments help explain the degree of popularity of podcasting since it has simplified listening processes (Berry, 2015). Unlike the early years of this tool, nowadays, one no longer needs to have an Mp3 player or an iPod to listen to or download a podcast. The availability of smartphones completely changed the way the podcast came to be seen by the public, democratizing its access and being responsible for the increase in consumption, especially among younger people (Newman et al., 2019; Newman & Galo, 2020).

The investment that audio platforms have made in podcasting also helps us understand the trivialization of the phenomenon. Apple, Spotify, and Google now have podcast aggregators, which allow listeners to access this type of content with enormous ease. “More platform support for subscriptions. That is already underway (e.g., Apple News+, Subscribe with Google, and Substack for independent writers), but we can expect more seamless integration of subscription into a wider range of native platform experiences this year” (Newman, 2021, p. 13).

One also needs to look into the contents when trying to understand podcasting’s impact on audiences. The podcast *Serial*, created in 2015, is a good example. That is a two-season podcast in which Sarah Koenig narrates research into the death of a university student in Baltimore, United States. *Serial* has been downloaded 340.000.000 times, and, according to Richard Berry (2015), it represents a turning point in podcasting history, launching a golden age for this digital tool. The same author states: “what *Serial* did was offer a podcast that not only had mass appeal but also presented itself as a narrative in which the audience could engage with intellectually and emotionally” (Berry, 2015, p. 171).

Since then, the podcast has encouraged independent journalistic production and provided traditional media with an effective way of captivating and keeping audiences (Newman, 2021).

This growing popularity translated into the generalized use by institutions, media companies, and amateur individuals (without any connection to the media industry) leads Bonini (2015) to consider that we are in the second era of podcasting. The author argues that this second podcasting era is embodied in the existing market and the professionalization of production. For Bonini (2015), this phase began in 2012 in the United States when the first business models emerged “capable of supporting the independent production and consumption of audio content distributed through podcasting” (p. 24).

The growth of podcasting has also motivated the academic community’s interest which started to invest in this tool as a study object, not limited to the radio (Kischinhevsky

et al., 2020). The podcast is beginning to assert itself as a relevant media sector, particularly in some countries, such as the United States or the United Kingdom. According to Deloitte (as cited in Newman, 2021), the podcast industry could in 2025 exceed “\$3.3bn globally” (p. 29).

4. METHODOLOGY

This study aims to understand how this new audio communication technology (the podcast), which has seen a growth in audience, has been used as a media resource to inform about the covid-19 pandemic.

From listening to three podcasts produced by Portuguese media, we carried out a content analysis of the episodes available between March and July 2020, identifying: (a) the main themes of each episode (Table 1), (b) the sources of information with voice (frequency in the episodes of protagonists who are health experts as well as other sources) and, (c) the structure of the podcast (fixed headings, interview model, response to pandemic issues, resident panels).

THEMATIC CATEGORIES	DESCRIPTION
Disease	Episodes focused on the disease (covid-19): symptoms, medication, vaccination, contagion, risk behavior
Economy	Effects of the pandemic on the labor market and public and company finances; episodes focused on teleworking, unemployment, and business opportunities
Animals	Topic relating to the presence of the new coronavirus in animals
Pandemic	Episodes focused on the global effects of the disease. This theme relates to the worldwide consequences of lockdown and the pandemic
Mental health	Mental health effects of the lockdown
Politics	Party-political approach to the pandemic
Public health policy	Themes related to public health policies
Rights	Citizens' rights regarding teleworking, privacy, such as distance learning and videoconferencing, fever measurement by non-medical institutions
Communication	Themes focused on the way governments, particularly the Portuguese government, communicated measures concerning the care and management of the pandemic

Table 1 Description of the podcast themes

The analyzed podcasts are the following: *Covid-19: Perguntas, Respostas e Efeitos* (Covid-19: Questions, Answers, and Effects), produced by Antena 1, *Anti-Vírus* (Antivirus), produced by Rádio Comercial and *Gabinete de Crise* (Crisis Cabinet), produced by *Observador* (Table 2).

PODCAST	PRODUCER	NUMBER OF EPISODES ANALYZED	AVERAGE EPISODE LENGTH	PERIOD ANALYZED	WEBSITE
<i>Covid - 19: Perguntas, Respostas e Efeitos</i>	Antena 1	29	8 minutes	March 25 to July 17, 2020	https://www.rtp.pt/antena1/podcasts/Covid-19-perguntas-respostas-e-efeitos_11178
<i>Anti-Vírus</i>	Rádio Comercial	27	2 minutes	The episodes available are all dated March 2020	https://radiocomercial.iol.pt/podcasts/anti-virus
<i>Gabinete de Crise</i>	<i>Observador</i>	18	20 minutes	March 27 to July 24, 2020.	https://observador.pt/programas/gabinete-de-crise/

Table 2 Characterization of the analyzed podcasts

The choice of podcasts presents different models of media companies: one produced by public service radio (Antena 1), an entertainment broadcaster (Rádio Comercial), and another one created by an online medium, despite also owning a radio (*Observador*).

All three analyzed podcasts have in common the fact that they do not represent native productions, that is, their contents, or part of them, were also broadcasted on the radio and do not exist only in the podcasting format. Nevertheless, despite being linked to the radio programming of the referred stations, that connection is established differently. Thus, the podcast *Gabinete de Crise* is a segment of the morning programming of Rádio Observador. The *Anti-Vírus* podcast results from interviews conducted by its author to broadcast Rádio Comercial. These interviews were conducted with experts in the medical field and were broadcast for about 1 month on the radio and available in podcast format on the station's website. Finally, *Covid-19: Perguntas, Respostas e Efeitos* results from a combination of interviews made by the author-journalist of the podcast, some of them previously broadcasted on Antena 1. Therefore, this podcast is the only one presenting different content from what aired on the radio.

Since podcasts have different structures regarding their alignment, we consider it relevant to describe each of them briefly.

The *Covid-19: Perguntas, Respostas e Efeitos*, from Antena 1, is presented in the form of an interview, in which the host of the podcast asks the experts questions that arise on various issues related to the pandemic, whether concerning the disease, the consequences on the labor market or education. The podcast does not have resident commentators/experts, but the repetition of protagonists in the analyzed episodes is frequent. The podcast is always presented by the same journalist, António Jorge.

The podcast *Anti-Vírus*, from Rádio Comercial, has a lighter structure and presents the contents much more synthetically. It always starts with a question answered by a resident specialist according to the topic addressed. It has a short duration of around 2 minutes. The presenter is Ana Martins, who remains in all the analyzed episodes.

Finally, the podcast *Gabinete de Crise* has the most complex structure. Each episode has several fixed segments and usually follows the same alignment. The episode starts

with the “Número do Dia” (Number of the Day) in which the resident commentators/experts present a number related to the pandemic and develop the discussion around it. In the second part, a guest speaker elaborates on the focus of that day’s program with the journalist and the resident commentators. The podcast also contains the segments “Desfazer Mitos” (Dispelling Myths) and “Nota de Esperança” (A Note of Hope) and is presented by journalist Carla Carvalho.

Based on the data collected from listening to the episodes, we reflected on how health was communicated in these podcasts using the theoretical framework presented in this article.

5. DISCUSSION

5.1. THEMATIC SCOPE: HEALTH, ECONOMY, AND RIGHTS

The main topic addressed in the podcasts was the “covid-19 disease” (Table 3). That happens in 44.59% of the analyzed episodes, especially on *Anti-Vírus* and *Covid-19: Perguntas, Respostas e Efeitos*. The podcast *Gabinete de Crise* is from the three analyzed the one that presents a smaller number of episodes where “disease” is the central theme.

	COVID 19: PERGUNTAS, RESPOSTAS E EFEITOS	ANTI- VÍRUS	GABINETE DE CRISE	TOTAL
Disease (covid-19)	12 (41.37%)	17 (62.96%)	4 (22.22%)	33 (44.59%)
Economy	12 (41.37%)	0	4 (22.22%)	16 (21.62%)
Animals	1 (3.44%)	0	0	1 (1.35%)
Pandemic	4 (13.79%)	0	2 (11.11%)	6 (8.11%)
Mental health	0	10 (37.03%)	1 (5.55%)	11 (14.86%)
Politics	0	0	1 (5.55%)	1 (1.35%)
Public health politics	0	0	4 (22.22%)	4 (5.41%)
Rights	0	0	1 (5.55%)	1 (1.35%)
Communication	0	0	1 (5.55%)	1 (1.35%)
Total	29	27	18	74

Table 3 Main themes of the episodes of the podcasts analyzed

The podcasts produced by Antena 1 and Rádio Comercial followed a similar logic. In the case of the podcast *Covid-19: Perguntas, Respostas e Efeitos* we found several episodes dedicated to issues related to group immunity, contagion, the use of the mask, the effectiveness of the medication, and the effects of the disease in children and pregnant women. The *Anti-Vírus* podcast also predominantly focuses on topics directly related to

the disease caused by the new coronavirus. It addresses sub-themes of the category “disease” related to the use of masks and gloves, how to proceed in case of symptoms and which are the most frequent, ways of contagion, and dangers for pregnancy.

The predominance given to the theme “disease” in the analyzed podcasts contradicts previously found data regarding the journalistic treatment of health issues in Portuguese newspapers (Lopes & Fernandes, 2012), which stated that “health policies” dominate the media agenda.

In the analyzed podcasts, “health policies” did not deserve particular relevance. Even so, the *Gabinete de Crise* presents several programs in which issues related to the Portuguese National Health Service and its resilience to the pandemic are addressed.

However, the data we collected about the priority given to themes directly related to the “disease” aligns with what was obtained about the Influenza A pandemic. Thus, it is consistent with the hyper mediatization of health topics when we talk about events that break into the news and that, either because of lack of knowledge about the new disease or its effects on health, generate a greater number of news items.

The themes related to “mental health” also deserve a highlight. In this case, the Rádio Comercial podcast absorbs, almost entirely, the number of analyzed episodes dedicated to this subject. Issues related to mental health were also addressed in the two other analyzed podcasts, although with lower incidence and in a different perspective. In the case of Antena 1, some episodes addressed the issues of panic, isolation, and loneliness. In the case of *Observador’s Gabinete de Crise*, the theme was addressed in only one episode during the analyzed period studied (June 26, 2020) and focused on issues related to the feeling of fear and depression. The *Anti-Vírus* dedicated, in the analyzed period, 10 episodes to this theme, which represent 37.03% of all the available episodes. The podcast advises listeners on dealing with the pandemic and, in particular, the lockdown period. Some of the themes are suggestive: “is it normal to cry?”; “does laughing help?” or “how to deal with our shadows?” were some of the questions asked in the episodes.

As we can see in Table 3, the themes related to the effects of the pandemic on the “economy” have great importance, particularly in the podcasts from Antena 1 and *Observador*. In the first case, this theme is central in 12 episodes. As sub-themes, we find a significant focus on issues related to telework and what it implies in terms of labor law. Unemployment caused by the economic crisis, how companies are reorganized because of the lockdown, and the reopening of commerce in the post-lockdown period are the main themes categorized under “economy”.

In the case of the *Observador*, episodes also focus on issues related to telework, the implications of distance learning, the reopening of borders, and tourism. Again, the perspective of the podcast *Gabinete de Crise* is more global and dialogic, promoting the discussion between several perspectives, particularly from the resident guests.

Unlike previous podcasts, Rádio Comercial’s *Anti-Vírus* did not devote any episode to economic issues.

If the themes related to “disease”, “mental health”, and “economy” are a priority in the analyzed episodes, we also found other less focused subjects, but still worth

mentioning. Thus, we find an episode of the podcast *Covid-19: Perguntas, Respostas e Efeitos* dedicated to companion animals. The *Gabinete de Crise* presents several other topics: communication of measures concerning the pandemic, the way political parties are managing the pandemic, privacy, and ethical concerns such as temperature assessment in non-clinical services.

5.2. A STAGE FOR THE EXPERTS

Lopes and Fernandes (2012) refer that health news are “usually built using information sources” (p.23). Listening to the analyzed podcasts allows us to confirm this scenario and realize the producers’ concern with disseminating information according to and validated by sources related to science.

Table 4 shows how the voices of doctors are a priority in all three analyzed podcasts. In addition, other protagonists linked to health, such as researchers, medical professors, and pharmacists, are also relevant.

	COVID-19: PERGUNTAS, RESPOSTAS E EFEITOS	ANTI-VÍRUS	GABINETE DE CRISE	TOTAL
Health researchers	1.85	0.00	1,89	1.49
Health professors	3.70	0.00	33,96	14.93
Pharmacists	1.85	0.00	0.00	0.75
Doctors	50.00	62.96	22,64	41.79
Psychologists	3.70	25.93	0.00	6.72
Non-healthcare professors	0.00	0.00	5,67	2.25
Priests	0.00	11.11	0.00	2.24
Veterinarians	1.85	0.00	0.00	0.75
Patients	1.85	0.00	0.00	0.75
Economists	1.85	0.00	35,85	14.93
Managers	7.41	0.00	0.00	2.99
Lawyers	20.37	0.00	0.00	8.21
Human resources of companies	5.56	0.00	0.00	2.24

Table 4 Presence of information sources in the analyzed podcasts (%)

The presence of these voices that explain, clarify and inform about the disease (symptoms, behaviors to avoid infection, medication, and vaccines) occurred following two strategies: as resident commentators or as guests. The podcasts *Anti-Vírus*, from Rádio Comercial and *Gabinete de Crise*, from *Observador*, adopted the strategy of having

resident guests. In the first case, André Almeida, an internist at the Central Lisbon Hospital and assistant professor at the Lisbon Faculty of Medical Sciences, has participated in all the episodes dedicated to health issues. In the podcast, *Gabinete de Crise*, the guest speaker on health Alexandre Abrantes, from the National School of Public Health, was later replaced by Sónia Dias, from the same institution. The participation occurred in all the podcast episodes, regardless of the theme. The podcast *Covid-19: Perguntas, Respostas e Efeitos*, from Antena 1, did not use resident experts but had a notable presence of health-related voices, as shown in Table 4.

The use of health-related experts aligns with international practice regarding podcasts on covid-19. The Reuters Institute study on podcasts dedicated to the new coronavirus in the United States, Denmark, France, the United Kingdom, Australia, and Sweden reveals that the strategy involved the presence of doctors in podcasts on covid-19 “answering listener questions and helping to correct false information” (Newman & Gallo, 2020, p. 21). We perceive this model as a way for the media to strive in these moments to provide audiences with accurate and fast information ensuring “better information and, consequently, a prevention behavior in citizens” (Lopes et al., 2010, p. 21).

The participation of experts from other areas was also noted in other themes mostly linked to the economic consequences of the disease. In this regard, once again, we noted the presence of a resident speaker, namely the podcast *Gabinete de Crise*, who participated in all episodes. In the case of the Antena 1 podcast, the presence of experts linked to the economy followed the guest model when the theme addressed in the episode justified it. The podcast *Anti-Vírus* did not use guests connected to the economic area, which is justified by the absence of the theme in the episodes provided.

We also identified other expert voices that, although they do not have particular relevance in the set of the three analyzed podcasts, are important in the individual context of some programs. Thus, we observed the presence of voices from the area of law in the case of the podcast *Covid-19: Perguntas, Respostas e Efeitos* from Antena 1. These experts intervened in episodes dedicated to teleworking and issues related to citizens’ freedom, rights, and duties in the context of the lockdown. In the two other podcasts, we did not observe the presence of voices linked to these areas.

Another presence that deserves to be highlighted is that of psychologists in the podcast *Anti-Vírus*, due to the program’s approach to these themes in several episodes, through issues related to mental health. The presence of psychologists in the other two podcasts analyzed is residual (in the case of Antena 1) or non-existent (in the case of *Observador*).

One fact that seems important to refer to is that the voice of a covid-19 patient was heard only once. It happened in the Antena 1 podcast *Covid-19: Perguntas, Respostas e Efeitos* and, even in this case, it was a doctor who had developed the disease. None of the other podcasts presented the testimony of someone who had experienced the disease in their episodes. This absence of patients can be explained by the priority given to the voice of the experts and less to those who, despite having developed the disease, would not have the scientific knowledge to explain or clarify the symptoms, limiting themselves, if they had participated, to being a voice of personal experiences.

5.3. THE PEDAGOGICAL AND SUPPORTING TONE

Listening to the three podcasts, it is evident the option of its producers to adopt an explanatory and elucidative tone regarding a new issue that incisively affected the world population. The analysis we bring to this article was conducted at the beginning of the lockdown when many doubts persisted about the virus's behavior, the symptoms, and the behavior we should all adopt to protect ourselves and others.

Analyzed podcasts show a concern to answer questions on the agenda during the period under analysis and discussed in the public space, either by health officials or politicians. For this reason, we found in the various episodes themes related to the use of the mask, which even generated some controversy at the beginning of the pandemic with officials from the Portuguese Directorate-General for Health stating that such use would not be a priority. Likewise, the use of gloves was also a topic addressed in several episodes, with the intervention of health experts who tried to explain the advantages and disadvantages of their use. The symptoms of the disease, the differences from the flu, the medication, the vaccine, the care to be taken during pregnancy and with children were recurrent themes, particularly in the podcasts *Anti-Vírus* and *Covid-19: Perguntas, Respostas e Efeitos*. In all of them, the strategy was to resort to explanations by experts.

The explanatory and informative tone is perfectly noticeable in the three podcasts analyzed. In the case of *Covid-19: Perguntas, Respostas e Efeitos*, and *Anti-Vírus*, the structure of the episodes is quite evident, since in some cases, the host introduces the topic in an interrogative way, moving on to an expert's answer. It is a format of a kind of consulting room. The podcast *Anti-Vírus* also leaves no doubt as to the strategy used, presenting itself on the website as follows: “do you have doubts? Rádio Comercial asks the specialists”.

The *Observador* podcast *Gabinete de Crise* has a slightly different logic. However, the explanatory and informative tone is also present throughout the episodes, especially in the segment called “Desfazer Mitos” (Dispelling Myths), in which the two resident speakers of the program clarify some issues individuals perceive as accurate. Nonetheless, that science has concluded to be false or not yet proven. As examples, we refer to these two cases: “is it true that it is dangerous to have pets at home?” (*Gabinete de Crise*, May 15, 2020) or “do the most severe manifestations of covid-19 affect only the elderly?” (*Gabinete de Crise*, June 26, 2020).

The studied podcasts sought to assist in the enlightenment of the population standing on the side of science. They advised, informed, clarified behaviors, practices, symptoms, and effects of the disease on issues related to contagion, group immunity, or the use of personal protection. This model of asking practical questions about the disease proved to gain acceptance in other contexts where podcasts on covid-19 were created as people want “relevant, direct, trusted information, and they want their questions answered” (Newman & Gallo, 2020, p. 21).

This practice places journalism in the “supporting role as a strategic field to influence individual and collective behaviors and attitudes” (Azevedo, 2012, p.188), a function verified by Lopes et al. (2010) regarding the news coverage in the Portuguese press

about influenza A. The authors state that in the “context of a possible epidemic, it is not surprising that the sense of social responsibility underlying the exercise of journalism reaches the top” (Lopes et al., 2010, p. 21).

Still in the field of health, but in this case, mental health, we also found several episodes focusing on clarifying and advising practices to reduce the lockdown effects. This theme, as we have already mentioned, is mainly addressed in the podcast *Anti-Vírus*, and in it, we find episodes in which a psychologist or a priest answer questions like “exercises to keep the mood high?”, “does making a list of intentions help?” or “how to deal with uncertainty?”.

The explanatory and informative tone, close to that of a “doctor’s office”, is also perceptible when the themes are related to telework, the rights and duties of citizens in lockdown, the behaviors to adopt after lockdown, particularly during vacation periods, like going to the beach. In all these situations, interventions from specialized sources are hegemonic, especially when linked to health or the economy.

6. CONCLUSION

Analyzed podcasts followed a supporting logic that is part of a global strategy to fight the pandemic. In any of the analyzed cases, the recourse to experts aimed at clarifying, informing, or correcting incorrect information about the disease and the population’s behavior against the new virus. This option of the producers is in line with previous studies, which refer that “health journalism, particularly the one that happens in a risk environment, shows great dependence on official and specialized sources, by the required decoding” (Lopes et al., 2010, p. 153).

The dialogical model adopted by the podcasts is close to what could be called a “doctor’s office”, where listeners have the opportunity to have some of their questions clarified. The tone used is one of clarifying doubts about something unknown to the population that generates uncertainty and fear in such a relevant area as health. By focusing mainly on the “disease”, podcasts created a consensus around specific issues, such as the use of masks, the identification of symptoms, or the need to avoid personal contact as much as possible. However, the practice model has also been extended to issues concurrent with the disease, such as lockdown effects on work and mental health.

Podcasts producers have taken on the role of spokespeople experiencing an unexpected pandemic situation and are looking for answers to help them make health-related decisions regarding their health. In this sense, as we have stated in the theoretical framework, podcasts align with the authors who identify journalism with an essential role concerning health literacy (Azevedo, 2012; Magalhães et al., 2017). This role is especially relevant during a pandemic that generated a scenario of uncertainty and concern about health, both the disease and the consequences of lockdown.

The podcast can, in this context, be an essential tool as a means of disseminating health information, in line with other international contexts where several daily information podcasts were created (Newman & Gallo, 2020). Despite the growing use of the

tool, including by the media, the Portuguese podcasting context has not yet reached the dimension of countries such as the United States or the United Kingdom, where the financial and production levels are very different from those of Portugal (Newman, 2021). Nevertheless, the podcast popularity among the Portuguese public has been growing in recent years, and the media have adopted this tool to get more time and space for content production that, otherwise, might not have room on the traditional platforms. That happened in the coverage of the covid-19 pandemic by creating several podcasts exclusively dedicated to it or producing episodes of existing podcasts. In our opinion, this practice reveals that health journalism can find in this new medium an additional outlet for information, leveraging its popularity with audiences, its free and easy access, and autonomy, allowing the listeners to listen whenever and wherever they want.

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THE CONTROVERSY IN MEDIA HEALTH COVERAGE: THE STAYAWAY COVID APPLICATION AND INFORMATION SOURCES

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ABSTRACT

Presented as an essential tool to stop the covid-19 pandemic, the Stayaway Covid app has remained at the scene of the national media landscape since it was mentioned for the first time, having generated around 1,400 news in 2020. This remarkable volume of news coverage reflects the potential relevance of this technology during a pandemic and the controversy among the public and the media. To contribute to the understanding of the news coverage of the application, we analysed the sources of a sample of 182 press, radio and television news pieces associated with Stayaway Covid, distinguishing those that focus on privacy and obligatoriness controversies from those that do not. In this case of public health controversy, the results show that experts did not take the lead, with politicians having a more prominent role in fueling the controversy, especially concerning the intention to make the application mandatory.

KEYWORDS

pandemic, media, sources of information, controversy, health journalism

A CONTROVÉRSIA NA COBERTURA MEDIÁTICA DE SAÚDE: A APLICAÇÃO STAYAWAY COVID E AS FONTES DE INFORMAÇÃO

RESUMO

Apresentada como um importante instrumento no combate à progressão da pandemia de covid-19, desde que foi mencionada pela primeira vez nos *media*, a aplicação Stayaway Covid manteve-se em cena no panorama mediático nacional, tendo originado cerca de 1.400 notícias em 2020. Este assinalável volume de notícias justifica-se não só pela potencial relevância desta tecnologia em contexto de pandemia, mas também pelas polémicas que se levantaram na opinião pública e nos *media*. De forma a contribuir para a compreensão da cobertura noticiosa da aplicação, foram analisadas as fontes de uma amostra de 182 notícias de imprensa, rádio e televisão com referência à Stayaway Covid, distinguindo as que focam as controvérsias da privacidade e da obrigatoriedade das que não o fazem. Os resultados evidenciam que, neste caso de controvérsia em saúde pública, os especialistas não assumiram o protagonismo, tendo os políticos tido um papel mais preponderante a alimentar a polémica, sobretudo no que diz respeito à intenção de tornar a aplicação obrigatória.

PALAVRAS-CHAVEpandemia, *media*, fontes de informação, controvérsia, jornalismo de saúde**1. INTRODUCTION**

The year 2020 will go down in history for having changed the world, citizens' lives, and the media agenda. The covid-19 pandemic that hit the planet was global, democratic, and overwhelming. In January 2020, the World Health Organization (WHO) declared the covid-19 outbreak a public health emergency of international concern (World Health Organization, 2020). This announcement in March and the balance of the months that followed would prove to be dramatic. As of January 31 2021, over 102.000.000 people have been confirmed to be infected with covid-19 worldwide, and nearly 2.200.000 people have died (<https://covid19.who.int/>).

In Portugal, several universities and research centres have worked to support health authorities in combating the pandemic since the beginning of the coronavirus' proliferation. In this context, in April 2020, the Institute for Systems and Computer Engineering, Technology and Science (INESC TEC), the Public Health Institute of the University of Porto (ISPUP) and the spin-off companies Keyruptive and Ubirider joined forces to develop Stayaway Covid. This mobile app could be used as a digital solution to track the spread of the virus in the country.

The increase in the number of people infected during the first wave of the pandemic, combined with the need to control the disease in the post-lockdown phase, led to the development of mobile solutions for digitally tracking the disease in various parts of the world. Apparently, successful application launches, as was the case in Singapore and South Korea, encouraged more than 40 countries to develop and adopt this type of solution (Munzert et al., 2021). According to data from the European Commission (Comissão Europeia, n.d.), of the 27 countries in the European Union, 19 have developed covid-19 digital tracking applications.

Naturally, the public debate raised by these initiatives caught the media's attention. Similarly to what happened in other countries, the Portuguese app was also faced with controversy. In fact, from the outset, the announcement of different dates for public release, the heated discussions regarding user privacy and data security, or the government's controversial intention of making the app mandatory, as well as other critical variables — such as the low number of users, the reduced generation of codes or their residual inclusion by users —, ultimately seemed to have compromised the app's effectiveness.

This study addresses the media — printed press, television, and radio — coverage of Stayaway Covid in 2020. The goal is to understand whether controversy influences the journalists' use of information sources, namely regarding the number and status of people heard in the news process. In particular, this study adopts a comparative perspective between the different media studied and between the presence, or not, of controversies related to data privacy and the mandatory use of the app.

2. THE SOURCES IN THE NEWS PROCESS

The relationship between information sources and journalists is crucial for understanding the sources' role in the news process. In more functional and utilitarian analysis, Manuel Pinto (2000) states that sources are always interested and communicate with a view to different objectives, ranging from seeking visibility and media attention to setting the public agenda or neutralising the interests of competitors or opponents. In turn, journalists resort to sources, for example, to obtain information, confirm or deny claims from other sources, dispel rumours, and develop stories.

This approach seems relatively straightforward; however, the author warns that it may be too simplistic if we consider that sources and journalists are “uniform, homogeneous, invariable realities” (Pinto, 2000, p. 281). The truth is that the interaction between sources and journalists is much more complex. Pinto recalls studies by Ericson in 1989 to emphasise that “different sources have different requirements, both in terms of exposure and knowledge” (Pinto, 2000, p. 281). These varying requirements from sources can influence the journalist's work when producing the news. Examples of these variables include the “off the record” and “embargo”, as well as pseudo-events and the increasingly frequent use of live broadcasting on radio and television (Pinto, 2000).

Journalists' integration into different institutional frameworks raises issues such as the socio-political environment (Hivon et al., 2010), the type of connection to the employer (e.g., precariousness), the editorial/political orientation of the news agency, or the level of workload at each moment (e.g., lack of time to consult more sources). Furthermore, journalists have different ages, genders and degrees of training, different statuses in the profession, and work in different institutional frameworks (Pinto, 2000). These variables can influence journalistic practices, how journalists relate to their sources, and what they expect to get from each news piece they write. Despite being currently characterised as confrontational, more often than not, “the source-journalist relationship is symbiotic” (Traquina, 2010, p. 256). If it is true that the source needs the journalist, it is no less true that the latter also needs their sources.

Several studies have sought to characterise the sources by establishing taxonomies. Such is the case of Manuel Pinto (2000), who separates sources according to specific criteria, such as their nature, origin, duration, attitude towards the journalist or action strategy, or Manuel Chaparro (Lopes, 2016), who classifies sources in a similar fashion, defining them as organised, informal, allied, reference, or bibliographic sources. Felisbela Lopes (2016) has also defined six variables that offer a complete view of information sources: number, composition, identification, geography, gender, and status.

The analysis of sources in the journalistic process often takes into consideration the sources cited in the news. A study by Felisbela Lopes et al. (2013) analysed news articles on health published in three Portuguese newspapers (*Expresso*, *Público* and *Jornal de Notícias*) for about 3 years concluded the sources cited are few, but almost always identified. News that did not indicate sources were rare, with the daily newspapers citing an average of one or two sources and the weekly four or more sources in most of the news reported. “This increase in the number of people who speak will certainly be an

asset when assessing the quality of the information provided by a given source”, and the citation of only one source “does not contribute to the multiplicity of points of view that should (almost) always be promoted” (Lopes et al., 2013, p. 66).

Regarding the status of sources in health media coverage, studies such as that by Olga Magalhães et al. (2020) confirm the prevalence of specialised sources, such as doctors and scientists, in journalism. “Their high degree of specialisation makes them more likely to influence the media agenda than a member of the general public” (Magalhães et al., 2020, p. 122). That is because health information often requires an expert to explain its predominantly technical nature, as, generally speaking, few journalists specialise in this area (Magalhães et al., 2020).

The above mentioned study published in 2013 on media coverage of health in the Portuguese press revealed that, among the specialised sources, the more frequently used are institutional sources that hold positions in the health field (Lopes et al., 2013). In addition to specialised sources, the media also value official sources (politicians, administrators, and health directors) in health news coverage. After institutional specialists, the Portuguese media privileged official sources (Lopes et al., 2013).

This great visibility of official sources and specialised institutional sources has an underlying organisation pervious to the demands of the journalists’ work. Acting proactively about the media or revealing a remarkable capacity to respond to the requests they receive, these sophisticated sources of information constitute a kind of brotherhood perpetuated by the news texts. (Lopes et al., 2013, p. 70)

3. CONTROVERSY IN HEALTH JOURNALISM

In a study on the coverage of influenza A in the Portuguese media, Felisbela Lopes et al. (2010) recall that since 1900 “we have already witnessed three confirmed flu pandemics, with the Spanish Flu being the most devastating” (p. 140). In their study, the authors also mention that many scientists believed a global flu pandemic was likely to occur in the next few years. The “prophecy” would come to be, and, 10 years later, the world was devastated by an infectious disease caused by SARS-CoV-2, which would spread rapidly worldwide.

In the context of a public health crisis, such as the one experienced in 2020, journalists must convey clear messages and warnings to populations about the prevention, symptoms, and treatment of the disease (Lopes et al., 2010). We witnessed the preparation of public messages to warn populations against threats to their health (Reynolds & Seeger, 2005). In crisis and emergency scenarios, with a high threat to public health, it is essential to combine risk communication strategies with crisis communication. Communication failures are critical, as they can prevent the population from being adequately protected. On the contrary, effective communication maximises the public’s ability to act

more efficiently and favours containment, reduces resistance, and enhances the chances of recovery (Lopes et al., 2010).

One of the most effective ways of massively communicating with the population is precisely through the media. Therefore, media use is part of the literature recommendations in the communication of pandemics (Vaughan & Tinker, 2009). Through the media, health authorities can send important and urgent messages to populations. Such is the case with the press conferences of the Directorate-General for Health in Portugal since 2020.

Interestingly enough, while the media can positively influence public health-related attitudes and behaviours (Nagler et al., 2015), conversely, the messages they convey when covering controversial themes can also increase its adverse effects. Although this area of research remains underexplored, there appears to be some evidence that exposure to conflicts and controversies in the media is associated with creating public confusion, diminishing trust in health recommendations, and reducing the adoption of prevention behaviours (Nagler et al., 2015). Viewed as the presence of disagreement between the players heard in the news, controversy affects the public perception of specific issues and seems to be directly related to the nature of the actors involved (Tschötschel et al., 2020).

In a recent study, Attila Szabo (2020) tested the effect of controversial messages about health issues in the judgments of 91 young participants. The researcher's results have shown that controversial information impacted their judgment and that this change persisted for at least a week.

One example of a media case that illustrates how controversial media information can impact individual judgment was the controversy over the age at which women should start screening for breast cancer through mammography. In 2009, a study published by the United States Preventive Services Task Force recommended biannual screening for women aged 50 to 74, emphasising that for women aged 40 to 49, the benefit of biannual screening was reduced. The controversy was caused by the fact that the American Cancer Society recommended having a mammogram annually from the age of 40, with studies conducted in Canada and Sweden showing that screening women between 40 and 49 years old had reduced mortality by 30% (Gaspar, 2016).

These contradictory recommendations naturally attracted the media's attention, but is it possible to know to what extent the media coverage of the controversy affected the perceptions and behaviours of women in deciding when to have a mammogram? Nagler et al. (2019) analysed the content of 364 television news focusing on recommendations from the United States Preventive Services Task Force and the American Cancer Society between 2009 and 2016. The results revealed the continuing prevalence of controversial information about the most appropriate age to start breast cancer screenings. The authors concluded that cumulative exposure to these messages could influence women's decision-making about screening, as well as their confidence in cancer prevention recommendations (Nagler et al., 2019).

In a study of the common features of public health-related controversies, Patil (2011) compares the eruption of controversies to a phoenix. After they suddenly emerge,

“they are fiercely debated and die abruptly, either because they are simply eclipsed by a new, larger controversy or because the passage of time makes them irrelevant, and so they are buried but never resolved” (Patil, 2011, p. 97).

Adding to what has been mentioned about the controversy, mass communication through the media is not exempt from the risks of inaccuracies or misunderstandings. If low-quality journalism about politics or business can affect reputations, in medicine, inaccurate reporting or news can generate false hopes and unjustified fears (Shuchman & Wilkes, 1997). Contradictions can also occur, resulting from the complexity of the themes and the crossing of sources with contrary statements (Lopes et al., 2010). Moreover, using a single source of information can bias the message, as only a single point of view is presented.

In fact, as Hivon et al. (2010) point out, “journalists are often accused of providing only a partial view, neglecting the views of vulnerable interested parties” (p. 34). For journalism to be accurate, plural, and ethical, it would be expected that the various parties should be heard and established as sources, specifically in cases of controversy where there are diverging opinions and positions. “When you only hear one person or write using a single document as a source, there is only room for one vision” (Lopes et al., 2013, p. 66). Moreover, from a deontological point of view, if the journalists have the right to “access sources of information freely” (Estatuto do Jornalista. Lei n.º 1/99, 1999, Chapter II, Article 6), they also have an obligation to “seek to diversify their sources of information and to listen to parties concerned in the cases addressed” (Estatuto do Jornalista. Lei n.º 1/99, 1999, Chapter II, Article 14, Point 1, para. e).

However, while it is recommended that the journalist includes other source categories to promote a more democratic debate, is that enough? Hivon et al. (2010) believe that it is not and raise different questions, as there are also variables to be considered when it comes to the public that consumes health news. Do readers (the corpus of the study focused only on printed press) judge scientific controversies in the same way? Do they similarly assess the credibility of sources? Do they attach the same weight to the voices the press presented and to the validity of their claims?

What seems unquestionable is that the media represent an essential source of information for the lay public on science and technology issues. Turning the focus to the mobile app that is the object of this study, it is important to remember, as stressed by Hivon et al. (2010), that health technologies “affect our lives in many ways, as in addition to paying for their implementation, we support their social costs” (p. 34). Therefore, “citizens need to be properly informed in order to be able to participate in the social and political debate about these technologies and to be able to think critically about the decisions that affect their lives” (Hivon et al., 2010, p. 34).

4. MEDIA COVERAGE OF THE STAYAWAY COVID APP

Stayaway Covid was publicly announced for the first time in April 2020. Considering the pandemic scenario that dominated the world, the media agenda was dedicated

almost exclusively to covid-19. As such, the development of the app immediately drew the media's attention.

Between April 27 and September 1, the day of the announcement, the clipping platform subscribed by INESC TEC and ISPUP had already registered more than 500 news — including printed press (46), online (458), radio (9), and television (11) — mentioning the Portuguese app used for tracking covid-19.

Even before the app became available, the debate on whether or not it preserved data privacy was widely covered in the media, as both experts and opinion makers spoke out against or in favour. The controversial phase of mandatory use came later when the government considered the possibility of forcing the public to install the app, which caused an uproar, both in public opinion and in the media. Given the controversy, the government retracted its decision, and the use of the application remained voluntary.

5. ANALYSIS METHODS AND DATA

This paper aims to investigate how controversy influences or not journalists resort to information sources in health news. Using the case of the Stayaway Covid app and considering different media, this study analyses how the nature of the controversy, namely the matters of privacy and mandatory use, influences the number and status of sources heard in the news process. Given the framework outlined in the literature review, the following hypotheses were raised:

H1: The controversy's nature and the different media (television, radio, and printed press) is associated with different journalistic practices regarding the sources heard in the news about Stayaway Covid.

H2: Given the specialised nature of the app and the public health context, expert sources have assumed a leading role in the news coverage.

The indicators were collected using the news platform Cision, subscribed by INESC TEC, and also by ISPUP, which monitors press, television, radio, and online news mentioning these organisations.

This study uses two methods: quantitative analysis and data content analysis to collect evidence that can confirm or not our working hypotheses. The time frame considered was the year 2020. In that sense, the first step was to extract from the platform all the news published in 2020 regarding “Stayaway Covid” or “aplicação” (the Portuguese word for an app) from a total of 1,397 news items.

It was possible to extract the news sorted by media automatically. Given the high number of news (over 1,000) detected in online media, only radio, television, and printed press news were analysed.

In all phases of the analysis, the three media were viewed separately. A first screening eliminated live news from the television and radio sample and opinion articles and editorials from the news sample in print media. The result was a corpus of 182 news stories (100 in print, 47 in television and 35 in radio), which were the object of this research.

A second screening was also conducted for each of the three media, using the content analysis method to separate the *controversial* from the *non-controversial* news.

Non-controversial news were all those that did not refer to any controversy (privacy, mandatory use, ineffectiveness, funding, or others). In other words, they always referred to the app in a neutral tone.

In the case of controversial news, reference to privacy or mandatory use was considered a selection criterion. In the selection relating to privacy, other search keywords were considered, such as “dados pessoais”, “proteção de dados” e “segurança” (Portuguese words for “personal data”, “data protection”, and “security”). For the selection regarding mandatory use of the app, the search included expressions such as “mandatório” e “uso mandatório” (Portuguese words for “mandatory” and “mandatory use”).

In a third screening, the controversial news set was split into three subsets according to the type of controversy (*privacy, mandatory use, or both*). The frequency of the news in each subset was counted.

In both groups (controversial and non-controversial), the sources of information were analysed regarding the following variables: presence/absence of reference to sources, number and status of cited sources. The analysis focused on each news set in the controversial subgroup (*privacy, mandatory use, and both*).

This classification was based on the taxonomic model developed by Lopes (2016), adapted for this case study, as will be explained next. Analysing the number of sources is crucial in this study and constitutes a determining factor in confirming our working hypotheses. While the absence of sources can make a journalistic text less credible, the existence and frequency of sources “allow us to perceive whether the journalist respects the principle of the contradictory and seeks to hear several versions/explanations of the subject in question or if, on the contrary, the journalist presents a simplistic account of the events, that is, the facts are only partially reported” (Lopes, 2016, p. 184). The presentation of more than one source of information can be particularly relevant whenever the news addresses controversial issues.

The status of the sources is also an important variable to understand which of the controversial news took greater prominence — whether those that focus on privacy, with more sources originating from civil society or those focusing on the matter of mandatory use, where most sources were members of the government or national politicians.

Following the taxonomic model Lopes (2016) proposed, four groups of sources were considered: official, professional, non-professional and citizens.

The official sources group includes “politicians with institutional positions” and “presidents/directors of institutions”. In the model taxonomy, “this group considers sources holding public office (elected or appointed) who, when dialoguing with journalists, are associated with a public institution/organisation/company” (Lopes, 2016, p. 186). However, this study also includes private institutions, such as INESC TEC, which, despite being private, has public universities as associates and is itself, in this news process, an official source of information on the app. Thus, this study separates “presidents/directors of public institutions” and presidents/directors of private institutions”. In the official sources group, this study also takes into consideration the geographical criterion to differentiate “national politicians with institutional positions” and “European politicians with institutional positions”.

In the group of professional sources, that is, “sources that speak because they exercise a certain profession that is their main job, for which they are paid” (Lopes, 2016, p. 186), this study differentiates experts and commentators. As the sample used also includes international experts, experts were classified according to geography. That led to obtaining three variables in this group: national experts, international experts, and commentators.

In the group of non-professional sources, this study considers “the sources that carry out a certain activity, in parallel with their profession” (Lopes, 2016, p. 186), primarily within civil society associations.

Finally, in the group of citizens are the “sources unrelated to any position, professional category or group, speaking on their behalf” (Lopes, 2016, p. 186). We could consider two unknown and notable subgroups; however, we only registered “unknown” in our sample.

Table 1 summarises what we have just described, and provides examples of sources found in the news that compose the corpus of this study.

	STATUS OF THE SOURCE	EXAMPLE
Official	National politicians with institutional positions	António Costa, prime minister
	European politicians with institutional positions	Sophie in 't Veld, a Dutch member of the European Parliament
	Presidents/directors of public institutions	Luís Goes Pinheiro, chairman of <i>Serviços Partilhados do Ministério da Saúde</i> (Shared Services of the Portuguese Ministry of Health)
	Presidents/directors of private institutions	José Manuel Mendonça, chairman of the board of <i>Systems and Computer Engineering, Technology and Science</i>
Professional	National experts	Luís Filipe Antunes, <i>Centro de Competências em Cibersegurança e Privacidade, Universidade do Porto</i> (Center of Competence in Cyber Security and Privacy)
	International experts	Isobel Braithwaite, University College of London
	Commentators	Paulo Portas, political commentator
Non-professional	Organised in civil society associations	Ricardo Lafuente, <i>Defesa dos Direitos Digitais</i> (Digital Rights Defence)
Citizens	Unknown	André Filipe, citizen

Table 1 Classification of sources according to status

6. RESULTS

The goal of analysing 182 news items (100 print, 47 television and 35 radio) considered part of this study was to differentiate controversial from non-controversial news.

Eighty-three controversial news items and 96 non-controversial news were then considered, as three press reports were removed from this last group because they addressed different controversies not contemplated in this study.

The results show that there is almost a balance between controversial and non-controversial news (Figure 1). Of the media analysed, it appears that radio is the only one with more *controversial* news (Figure 2), although the difference is not significant.

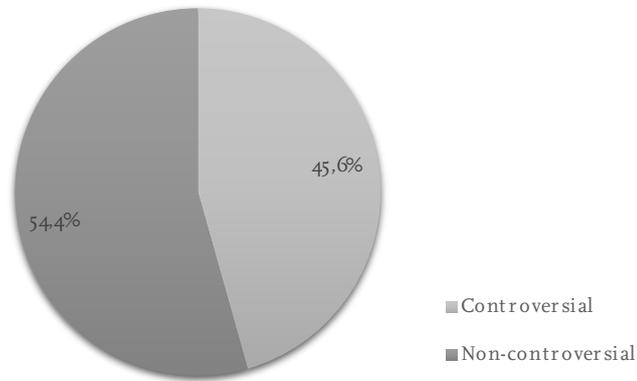


Figure 1 Classification of controversial news on the matters of privacy and mandatory use

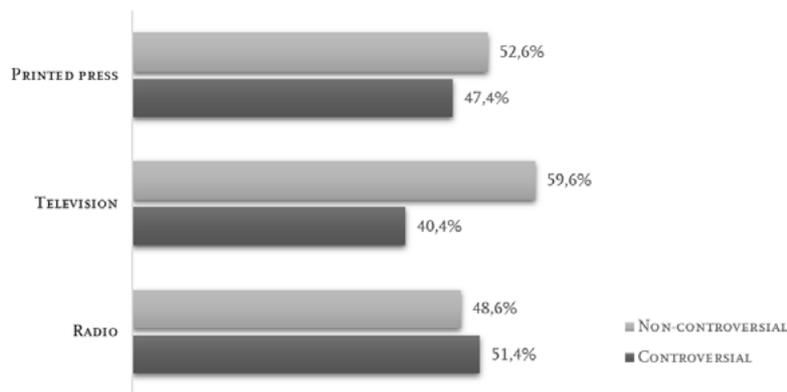


Figure 2 Percentage of controversial and non-controversial news in radio, television, and printed press

The practice of citing sources in the news (Figure 3) was always followed in the case of controversial news. Non-controversial news mostly cite one source, and in 16.2% of the news, no source is cited at all. More than half (61.4%) refer to two or more sources in the news where controversy is present. A significant percentage (27.7%) of news refers to four or more sources.

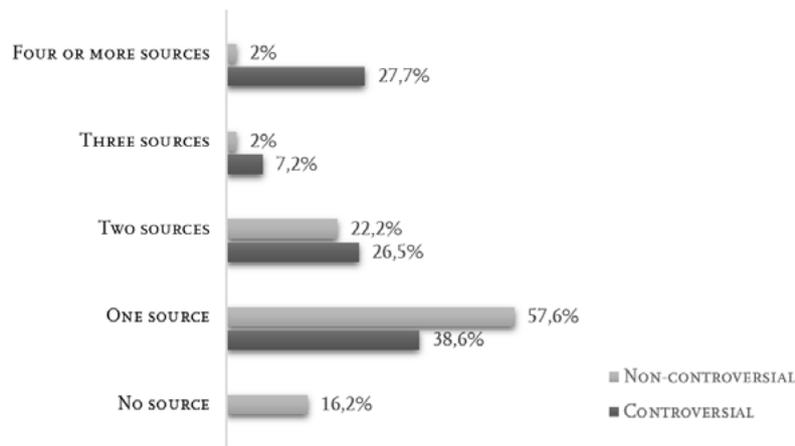


Figure 3 Percentage of controversial and non-controversial news according to the number of sources cited

The number of controversial and non-controversial news sources was also analysed separately for radio, television, and printed press to understand if they differed significantly.

The results show that the media generally share the same trend (Table 2). The printed press produced the highest number of controversial news, citing two or more sources (69.6%), followed by radio (55.6%), and finally television (47.4%). In the case of non-controversial news, television takes the lead in the news that do not mention any source (21.4%), followed by the printed press (14.8%) and radio (11.8%). Radio cites only one source more often (70.6%), whereas two or more sources are cited mostly by television (35.7%), followed by the printed press (24.1%) and radio (17.6%).

NEWS		RADIO	TELEVISION	PRESS
Controversial	No sources	0.0%	0.0%	0.0%
	One source	44.4%	52.6%	30.4%
	Two or more sources	55.6%	47.4%	69.6%
Non-controversial	No sources	11.8%	21.4%	14.8%
	One source	70.6%	42.9%	61.1%
	Two or more sources	17.6%	35.7%	24.1%

Table 2 Percentage of controversial and non-controversial news according to number of sources cited

As to the nature of the controversy, mandatory use was primarily addressed on radio and television news, whereas printed press focused mainly on privacy (Figure 4).

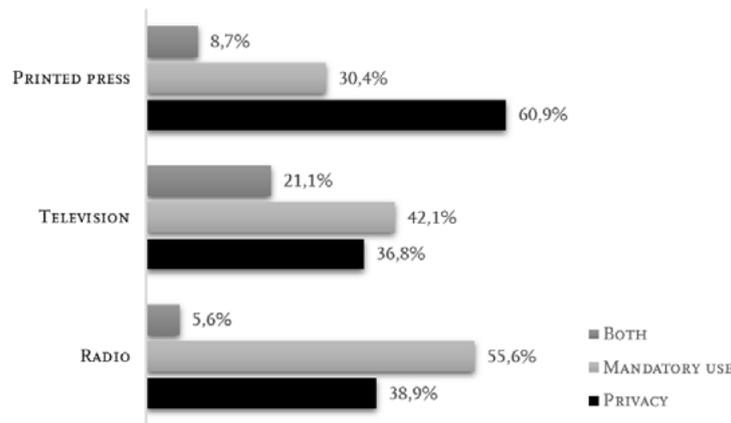


Figure 4 Percentage of news on matters of privacy, mandatory use, or both

The nature of the controversy seems to influence the use of information sources (Figure 5). Thus, close to half (45.2%) of the news published on privacy use only one source, while those focusing on mandatory use with two or more sources reach 78.2% (against 54.7% on the matter of privacy).

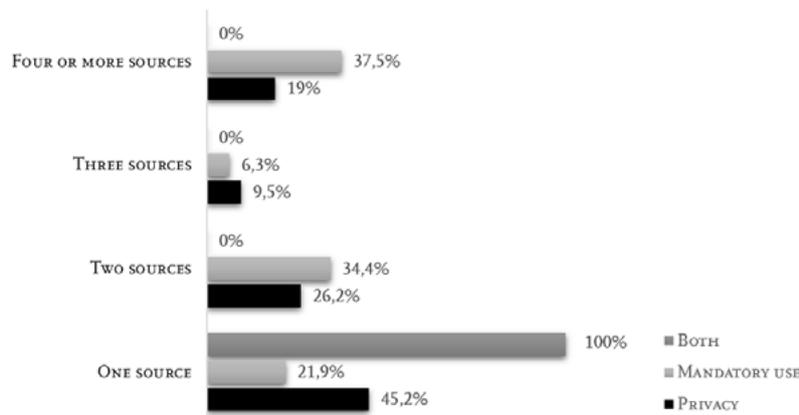


Figure 5 Percentage of news on matters of privacy, mandatory use, or both, according to number of sources

The analysis conducted reveals that all three media use more sources in the news focusing on mandatory use, with radio recording the highest percentage (80%) in two or more sources, followed by the printed press (78.5%) and television (75%). When it comes to privacy, the use of two or more sources drops considerably, particularly on the radio (28.6%) and television (42.9%). In printed press, the difference is not that noticeable (64.3%).

The data obtained (Table 3) show that the non-controversial news coverage of the app is based on three types of sources: managers of private institutions (namely from INESC TEC), followed by politicians and heads of public institutions. These three types

constitute over 90% of the sources heard. The news items about the app's development mainly focused on its developers and were then commented on by politicians. Not once, for example, was the voice of citizens heard.

STATUS OF THE SOURCE	CONTROVERSIAL			NON-CONTROVERSIAL	
	PRIVACY	MANDATORY USE	BOTH		
Official	National politicians with institutional positions	24.2%	32.7%	44.4%	30.7%
	European politicians with institutional positions	2.1%	4.7%	0.0%	1.0%
	Presidents/directors of public institutions	14.7%	5.6%	0.0%	10.6%
	Presidents/directors of private institutions	31.5%	25.2%	22.2%	52.9%
Professional	National experts	13.7%	16.8%	22.2%	2.9%
	International experts	5.3%	1.9%	5.6%	0.0%
	Commentators	2.1%	3.8%	0.0%	1.9%
Non-professional	Organised in civil society associations	5.3%	0.9%	5.6%	0.0%
Citizens	Unknown	1.1%	8.4%	0.0%	0.0%

Table 3 Percentage of controversial news on the matters of privacy, mandatory use, or both, and percentage of non-controversial news, according to the status of the sources

This picture completely changes when the controversy aspect arises, especially when it comes to the sources heard. Data analysis also allows us to understand that different sources of information vary depending on the nature of the controversy. Among official sources, politicians with institutional, national, and European positions were called on to give an opinion or were cited more often in controversial news on mandatory use than in the news focusing on privacy.

Although the difference is not significant in terms of national politicians, in the case of European politicians with institutional positions, the results show that they were used as sources twice more often in the news focusing on mandatory use. On the contrary, presidents/directors of public and private institutions were cited more often than official political sources in the news related to privacy instead of news on mandatory use. The leaders of public institutions provided statements about the app's privacy more than twice as often (14.7%) compared to mandatory use (5.6%). The difference in the case of leaders of private institutions is not that significant (31.5% on the matter of privacy, and 25.2% on the matter of mandatory use).

In the group of professional sources, we observed that national experts intervened more actively as sources in the news that focused on mandatory use (16.8%). However, the difference was not significant compared to news pieces focusing on privacy (13.7%). It was the opposite with international experts, with 5.3% of citations in the news related to privacy and only 1.9% in those focusing on mandatory use. The commentators' participation was somewhat balanced, as they were asked to give their opinion in 2.1% of the news on privacy and 3.8% in the news on mandatory use.

The non-professional sources organised in civil society associations were more active in the news that focused on the app's privacy: 5.3% compared to 0.9% of news focusing on mandatory use. On the contrary, unknown citizens were more often invited to give their opinion in the news that highlighted the mandatory use of the app (8.4%), compared to those that mentioned the privacy aspect (1.1%).

The use of sources also depends on the nature of the media. National politicians intervened more often in the news that focused on privacy (44.4% for television and 25% for radio) than in those addressing the aspect of mandatory use (27.8% for television and 18.8% for radio). The opposite happened in the printed press, with newspapers citing politicians more often on the issue of mandatory use (42.1%) than on privacy (21.8%). National experts played a more active role in the cases of news that focused on mandatory use. On the contrary, they played no active role in radio and television news regarding the privacy controversy.

7. DISCUSSION

In a year dominated by the covid-19 pandemic, there was a “disruption in the world media system, which in many countries, namely in Portugal, created the conditions for a journalism marked by civic and citizen responsibility” (Cabrera et al., 2020, p. 187). In crisis for decades, traditional media managed to gain new momentum compared to the direct competition of social networks and free online content (Cabrera et al., 2020). Traditional media became the most accessible and reliable means of information for ordinary citizens. The analysis of information sources, more specifically the mediatisation of the Stayaway Covid app, is particularly relevant because official sources present this technology as an essential tool for the containment of the pandemic and because it is questioned by specialists and civil society associations that become opinion leaders for the ordinary citizen, who will form an opinion and make the decision to install the app (or not).

The results obtained from the analysis of our corpus confirm the first hypothesis: the nature of the controversy and the different media (television, radio, and printed press) is associated with different journalistic practices regarding the sources heard in the news *about* Stayaway Covid. Firstly, it is confirmed by the data presented that media controversy is significantly associated with using a higher number of sources. The news that addressed more neutral aspects of the app were the only ones in which no source was cited or featured one source only. Whenever privacy or mandatory use was the subject of the news, journalists cited sources, and, in 60% of cases, they heard two or more sources. The data obtained suggest that the practice of citing sources is more associated with the principle of the contradictory, in which parties with relevant interests are heard than with the practice of going deeper into matters and exploring different perspectives. To a certain extent, the data show a paradox: when the media follow the general principle (Lopes et al., 2013) of clarifying public opinion (listening to various sources regarding the matters in the news), this generates more significant controversy, which affects the public's perception of the problems, generating more confusion (Nagler et al., 2015).

The media also presented different coverages. Television tended to have a more neutral coverage, devoting less time to controversy over the app. Moreover, television presented the most news without mentioning any source of information. Radio was the medium that devoted more time to controversy than neutral news regarding the mandatory use of the app, followed by television. Printed press, in turn, focused more on the issue of privacy, listening on average to more sources, and followed a more sustained approach to Stayaway Covid in terms of time devoted to the matter. Thus, because it was more political, intense, and limited in time (less than a week), the issue of mandatory use ended up drawing more attention than all other matters, both in radio and television, which are characterised by their immediacy. For that reason, more time and space were devoted to this aspect. News that focused on privacy were featured twice more often in printed media than those focusing on mandatory use. With a broader exposure over time (about six months), the news related to privacy, more technical, found more space for context and debate in the printed media. The role of politicians as sources of information, associated with greater media coverage and the impact of controversy (Nisbet et al., 2003; Tschötschel et al., 2020), seems to be more prevalent in radio and television, as they focus more on the present, marked by the political agenda.

Taking as a starting point the work of Magalhães et al. (2020) regarding the role of experts when covering issues related to health and research, the second hypothesis suggested that, given the specialised nature of the app and the public health context, expert sources played a predominant role in the news coverage. The data collected does not support this hypothesis, as national politicians played a more relevant role in the news coverage, mainly when the news focused on privacy and mandatory use controversies. While in non-controversial news, politicians lagged behind the heads of private institutions, in controversial news, they were some of the most relevant sources. Specialised sources also lagged behind the presidents and directors of public institutions regarding controversial news, despite their essential role in the coverage. These data are also not in line with other studies in health, such as that by Lopes et al. (2013), who pointed out that specialised sources were consulted most often.

In the case of the Stayaway Covid app, its more political aspect seems to have prevailed instead of its public health component. While it is true that INESC TEC is an official source because it is the institution responsible for the app's development, it may also have been seen by the media as a specialised institutional source. The respective spokespersons, chosen for their academic training and research experience, were also viewed as specialists since they were directly involved in the app's development. This aspect must have been critical in the non-controversial phase. Nevertheless, it is significant that politicians have had such a strong presence, especially in the coverage of controversies linked to mandatory use.

National experts — divided mainly between health professionals, technology experts and constitutionalists — played a more active role in the news that focused on mandatory use (16.8%), compared to those that focused on privacy (13.7%); however, the difference was not that significant. The opposite happened with international experts.

Presidents/directors of public and private institutions were cited more often as sources in the news related to privacy than those focused on mandatory use. While in the case of the leaders of public institutions, that difference was relevant because they provided statements about the app's privacy more than twice as often compared to mandatory use, this margin was thinner in the case of the leaders of private institutions. The justification for this may lie in the fact that INESC TEC's spokespersons, who are also viewed as official sources from private institutions, have been frequently called to make statements on both controversies.

Again, and in line with previous studies (Magalhães et al., 2020), the data from this study show that when covering subjects, journalists still do not privilege individual citizens or citizens organised in associations. Their role in the news process is marginal, as media professionals do not frequently consider their perspectives. When the coverage did not focus on any controversy, the perspectives of citizens were utterly absent. Moreover, as expected, civil society associations, such as D3 and Deco, played a much more active role in the news that focused on the app's privacy compared to the matter of mandatory use. The opposite happened with the unknown citizens.

Generically speaking, and comparing both controversies, it is possible to state that the coverage of the mandatory use, which took place mostly on radio and television, was very limited in time and heard primarily from the voice of national and, to a lesser extent, European politicians. National experts were consulted more often than specialised sources from other countries. Here, fewer civil society organisations and more individual citizens played an active role. The privacy issues were addressed more often in newspapers, for a remarkable period, from the perspectives of presidents of private (namely INESC TEC) and public institutions. International experts were consulted more often in this case as well. Civil society organisations also played a relevant role in the news process regarding privacy. Therefore, being different in their origin, the controversies also received a different journalistic treatment. The controversy of mandatory use, originated by government intent, appealed more to politicians than the matter of privacy. In turn, the privacy controversy, raised mainly by democratic concerns, gave more voice to organised civil society.

8. CONCLUSIONS

This analysis of the Stayaway Covid app news coverage shows that the controversy dominated a large part of the public discussion in the media, from the beginning of its development until the end of the year. It was the first time that Portugal implemented a mobile app at the national level to benefit public health. Although not everyone may understand how it works, public opinion, politicians, institutional leaders, and experts took positions in favour and against using the Stayaway Covid app. Was media communication plural? It can be said that yes, as there was, in most cases, an effort to present different perspectives. Whether it was sufficiently enlightening is beyond the scope of this study; however, the presentation of different perspectives through different sources

is primarily associated with controversy. As suggested by the literature in this domain, that can compromise the public perception of the subjects.

This study also confirms that the different means of communication qualify the public space differently regarding health communication. Radio and television are more dependent on the political agenda and have addressed the controversies related to mandatory use when politicians raised the issue. On the other hand, the printed press offers a space for reflection that extends over time and is more dedicated to the general context of the app. It is important to mention that other controversies related to the app could not be analysed as part of this study. Furthermore, online news, which constituted the majority of pieces published on the app, was not considered and, therefore, we do not know if they could influence the results obtained.

Nevertheless, this work significantly contributes to understanding the news coverage of controversies in health and technology according to the sources of information heard in the process. Besides the previously mentioned analysis on the behaviour of different media and the reflection on how different sources can accentuate the controversy, this study highlights the nature of players involved as a relevant factor in explaining the controversy's dimension. In fact, and contrary to what happens in other health issues where the controversy is not relevant, in this study, political players appear as one of the key elements that fuel the controversy.

Translation: Rita Pacheco

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BIOGRAPHICAL NOTES

Sandra Pinto has a master's degree in science communication (2010) and a degree in media communication (1997) from the University of Minho. She started her professional career at the headquarters of Portugal Telecom (currently Altice), where she carried out various activities in internal communication for two years. Sandra Pinto joined INESC TEC in 2000 as a communication specialist, establishing the communication service. Between April 2006 and May 2021, she assumed the role of head of communication, pursuing science communication activities to promote and boost the institution's knowledge, image, and prestige. She worked as head of communication in the UT Austin Portugal Program hosted at INESC TEC from June 2018 to March 2020. She ensures, since June 2021, the communication of the Bial Foundation.

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CONSPIRACY THEORIES IN TIMES OF THE COVID-19 PANDEMIC: POPULISM, SOCIAL MEDIA AND MISINFORMATION

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ABSTRACT

Social media platforms have for a long time been recognized as great disseminators of misinformation on health. Previous studies found a positive association between the use of social media as the main source of information and the acceptance of forms of misinformation, such as conspiracy theories. The association between populist attitudes and the valuation of information through social media is also described. From a questionnaire applied to 242 respondents after the first state of emergency of the covid-19 pandemic (March 2020) in Portugal, this study aims to identify the background and pre-requisites for the belief in misinformation. The data obtained suggest that individuals with populist feelings have less trust in institutional strategies to fight the pandemic, privileging social media as a source of information and revealing a greater acceptance of the conspiracy theories on the disease. The connection, documented in the literature, between the belief in conspiracy theories and risk behaviours recommends that measures be adopted to combat misinformation factors.

KEYWORDS

media, social media, misinformation, conspiracy theories, covid-19, infodemic

TEORIAS DA CONSPIRAÇÃO EM TEMPOS DE PANDEMIA COVID-19: POPULISMO, *MEDIA* SOCIAIS E DESINFORMAÇÃO

RESUMO

As plataformas de *media* sociais são há muito reconhecidas como grandes disseminadoras de desinformação sobre saúde. Estudos anteriores encontraram uma associação positiva entre a utilização dos *media* sociais como fonte principal de informação e a aceitação de formas de desinformação, como teorias da conspiração. Encontra-se ainda descrita a associação entre atitudes populistas e a valorização da informação através dos *media* sociais. A partir de um questionário aplicado a 242 respondentes após o primeiro estado de emergência da pandemia da covid-19 (março de 2020), em Portugal, o presente estudo possui como objetivo identificar antecedentes e pré-requisitos da crença em desinformação. Os dados obtidos sugerem que indivíduos com sentimentos populistas possuem menor confiança em estratégias institucionais de combate à pandemia, privilegiam os *media* sociais como fonte de informação e revelam uma maior aceitação de teorias da conspiração sobre a doença. A ligação, documentada na literatura, entre crença em teorias da conspiração e comportamentos de risco, recomenda a adoção de medidas de combate aos fatores de desinformação.

PALAVRAS-CHAVE

media, media sociais, desinformação, teorias da conspiração, covid-19, infodemia

1. INTRODUCTION: FROM THE PANDEMIC TO THE INFODEMIC

Since the last few months of 2019, information on health has become the centre of attention and concern of people around the world. On a scale and with a duration without precedent in recent collective memory, the pandemic caused by the disease of the new coronavirus variant, covid-19, has occupied, in an almost hegemonic fashion, the agenda of the various media — putting on the backburner many other issues that usually composed it and coupling, in a subordinate way, the remaining topics that still managed to make the news. In times of crisis, like when there are natural disasters on a large scale, terrorist attacks or outbreaks of diseases, the importance of the media increases, and the information they include become a key element for society to function. Due to the high level of uncertainty, most people turn to the media to understand the environment in which they live and make decisions relative to it. Similarly, in these situations, the media's influence is frequently magnified. Also, because of this, particularly in crisis management situations, the resource to reliable sources of information is one of the most important factors of social behaviour (Longstaff, 2005).

Focusing on how the vast media system operates, this study was developed for nearly a year (from March 2020 to February 2021), during which the covid-19 pandemic dominated the public sphere. During this period, alongside the global spread of the virus itself, it is today clear that another type of pandemic developed. With the quick spread of the disease, there was also an information outbreak through social media and conventional media, where a vast torrent of “news” as to the virus' origin and the forms of fighting it circulated, as virally and quickly as the infection. The director-general of the World Health Organisation (WHO), Tedros Adhanom Ghebreyesus, warned, still in the first few months of the pandemic, that with the arrival and spread of covid-19, “at WHO, we're not just battling the virus; we're also battling the trolls and conspiracy theorists that push misinformation and undermine the outbreak response” (World Health Organization (WHO), 2020). To some extent, this threat had already been anticipated years before. In 2013, the World Economic Forum (WEF) emphasised the existence of phenomena of massive digital misinformation, whose proliferation, stemming from social media, would represent one of the main threats for our societies in its various realms (Howell, 2013). Today, multiple phenomena of misinformation associated with social media platforms have been identified. In effect, characteristics such as openness, generalisation of access and reduction of control mechanisms, combined with mass and/or selective dissemination automatisms, have facilitated the creation and spread of content of a different nature, generators of false information, from unverified rumours and gossip to poorly written news, intentionally fake content or even conspiracy theories.

In this paper, we will use the concept of misinformation as a way of contemplating a whole growing number of concepts with a distinct nature and intention (from spam to

fake news), defining the term “misinformation” as an “umbrella to include all false or imprecise information spread by social media” (Wu et al., 2019, p. 81). We will also use the notion of “conspiracy theory”, following the characterisation proposed by Freeman et al. (2020): understandings and narratives that arise from four assumptions — that reality (the world or a fact) is different from what it seems; that the truth is being concealed by powerful entities; that this perception or theory is only accepted by a minority of individuals; and that, lastly, these beliefs are not liable of being sustained on scientific evidence.

In a viral and potentially dangerous manner, a vast set of conspiracy theories and misleading rumours, with the abovementioned characteristics, have been widely shared through online media — which include all the major social media platforms, video publishing and messaging platforms (from Twitter to Facebook, Instagram, WhatsApp, YouTube, etc.). Speculation, without scientific or factual grounds, as to possible causes, therapeutics or even the actual development of the pandemic circulates quickly, causing confusion and leading to risk behaviours (Allington et al., 2021). Individuals that define themselves as specialists interact through social media or websites to provide information on the disease, reporting on their clinical practice — sometimes arguing that covid-19 does not cause worse symptoms than the mild flu and, therefore, is not a health danger, and, other times, unveiling frightening realities that the professional media are hiding. For observers prone to conspiratorial beliefs, messages of this type operate as a confirmation mechanism for already latent assumptions (Goreis & Kothgassner, 2020). As a whole, online conspiratorial beliefs on covid-19 emerge expressed as an “outbreak”, as the latest wave of a “flood of conflicting information, misinformation and information manipulated on social media” (Allington et al., 2021, p. 1763).

A study by the U.S. State Department, initially published in *The Washington Post* (Romm, 2020), mentioned that nearly 2.000.000 tweets spread conspiracy theories on coronavirus during the 3 weeks in which the outbreak started to spread outside of China. Among the most common posts were those that described the virus as “a biological weapon”. According to a report obtained by *The Washington Post*, these and other false rumours represented 7% of the total tweets studied and were characterised as “potentially impactful on the broader social media conversation” (Romm, 2020, para. 2). The negative consequences of misinformation, which is particularly abundant today, on various issues within the domains of health are widely known. Among them, is the deterrence of effective preventive measures and the decrease in people’s awareness of the degree of harmfulness of viruses and diseases (Allington et al., 2021; Vraga et al., 2020). Several other studies suggest that belief in misinformation related to covid-19 is positively associated with negligence in prevention and reluctance to take protective measures (Barua et al., 2020), factors that, in and of themselves, contribute to the increase of fatal outcomes.

In times of uncertainty, with the covid-19 pandemic dominating the public sphere for many months, and affecting, with no exception, all domains of social and political life, the initially defined public health crisis, started to appeal, for analysis, to the use of another relevant concept in the framework of the analyses of our time: the notion of populism. Indeed, the relationship between “crisis” and “populism” has been one of the

constant topics in social and political literature since the beginning of the last century. Not only are “crises” seen as particularly opportune moments for the resurgence of populist actors, but they also favour social and political divide and promote speech that separate and stimulate tensions — “people” and “elites”, rulers and ruled, system and ordinary individuals. It is in contexts of crisis that “populists” invoke and incorporate in their discourse the expression of that same crisis, integrating and unifying grievances and frustrations, thereby mobilising broad social sectors against the “indifferent elites”, blamed, to some extent, for the state of crisis (Katsampekis & Stavrakakis, 2020).

The role of the media in this process is not insignificant. While traditional journalistic media have tried to adapt their duties and mission to a quickly evolving context, social media and “alternative news on the internet” distinguish themselves through the specific slant they give to events. Even when it is not about potentially dangerous “fake news” and conspiracy theories, they predominantly share messages with a strong critical, even anti-systemic tone, opposing the mainstream media’s view of the political establishment. Strictly speaking, some authors refer to the rise of a *pandemic populism* that, during this period, has contributed to the consolidation of contradictory, threatening and distrustful views of the world. Against this backdrop, academic research has made efforts to analyse the communication pathologies that developed alongside the pandemic and to try to identify generalised connections and patterns of pandemic populism that, it should be noted, seem to co-evolve with the spread of the virus itself (Boberg et al., 2020).

These are the purposes of this study.

2. LITERATURE REVIEW

2.1. POPULISM

Most literature identifies a particular understanding of “people” as the most important element of the populist ideology. From the outset, the people are conceived as a homogenous or monolithic group, good by nature and the beholder of a vast repertoire of positive attributes — purity, wisdom or authenticity (Albertazzi & McDonnell, 2008, p. 6). Closely related to the people is the concept of popular sovereignty, which defines the people as the legitimate and ultimate political sovereign, in a kind of renewed (and not exact) version of the idea of general will proposed by Rousseau. In the populist sense, popular sovereignty is a central premise for democracy to function — without which its functioning will be affected. It stems from this argument that populist discourse denounces the figure of elites who, more than accused of not representing the people’s will, are held responsible for betraying that same will and, thus, depriving the people of their legitimate right to exercise power. The elites are also accused of complicity with *others*, *external* to the people they favour to the detriment of the ordinary people. The “other”, as opposed to the “people”, can be defined in various ways, which correspond to different versions of populism. Generally speaking, populism implies an opposition between ordinary citizens and a corrupt establishment (system; Mudde, 2004). Some forms of populism accentuated more specific profiles of exclusion: groups diffusely identified as

external to the community (refugees or emigrants, but also ethnic, gender or economic minorities), which, among other things, are accused of depriving the native people of their economic, symbolic and cultural capital (Mazzoleni, 2003).

In various ways, populist social actors present themselves as representatives, defenders and spokespersons for the people. Their discourse is organised around a permanent challenge in its most common traits: rescuing sovereignty and returning it to the people. Two skills are important to fulfil these duties: first, greater sensitivity to opinions and problems that, at any given time, resonate more with broad sectors of the public; afterwards, a way to communicate that favours direct and non-mediated channels, without the filtering or control of the mediators, whomever they may be (Canovan, 2002, p. 34; Kriesi, 2014, p. 363). In turn, citizens with populist sentiments support a view of social and political life that is organised and expressed within this ideology (Schulz et al., 2017). More specifically, individuals with populist sentiments show anti-elite attitudes and reproach the political class or others who hold power, whom they accuse of losing touch with the people and not attending to their problems and interests. Furthermore, citizens with populist sentiments demand unlimited popular sovereignty in a way that, in its most extreme forms, allows for the unrestricted submission of liberal democratic elements or minority rights to the expression of majority popular sovereignty. Lastly, these individuals share the mythologised image of the people as a homogeneous and virtuous group, a coherent, honest, inherently good entity with the same values and interests.

2.2. SOCIAL MEDIA AND POPULISM

The connection between the media and populism is not new. At first, the mass media provided populists with a more direct channel to the people than the provided through more institutionalised means of political communication — such as manifestos, speeches or parliamentary discourse. Even so, the populists needed to submit to the journalistic gatekeepers, to their criteria and routines and even to the cycles inherent to news production itself (Shoemaker & Vos, 2009). Today, in the environment created by the internet, these factors play a less important role, at least in power. Among other factors, the online environment allows bypassing the various traditional filters and creating more direct forms of communication, described by some as a “one-step flow of communication” (Bennett & Manheim, 2006; Vaccari & Valeriani, 2015).

The very existence of this “free” environment stimulated the rise of anti-media populism (Krämer, 2014) throughout the West. For citizens with populist sentiments, what would be a healthy form of scepticism towards the media has been progressively replaced by a distrustful discourse towards the media professionals, who deliberately act against people’s interests (Schulz et al., 2020). Studies that combine variables of selective exposure and scepticism towards the media (Stroud, 2008; Tsfatsi & Cappella, 2003) suggest that individuals with populist sentiments tend to distance themselves from the mainstream information media, which they accuse of lying and of being close to the political elites.

From this point on, social media emerges with an increasingly central role in shaping political opinions. They assume some of the fundamental democratic roles that once belonged to the mass media — such as providing information and different points of view on current political and social issues. On platforms like Facebook or Twitter, individuals and political actors (populist or not) can express their views on important social issues without the constraints and filtering of the professional and ethical rules that regulate media professionals (Papacharissi, 2010). Taking advantage of this freedom of expression, citizens and politicians alike often use these means to emphasise the divide between the virtuous ordinary individual and the guilty external antagonist. Some years of research have come to describe cases in which the attribution of responsibilities articulated by the populist actors through social media have decisively influenced the attitudes of important sectors of public opinion in countries other than the West, with relevant consequences from the point of view of social and political life — ranging from electoral results to the same vision of society as a whole. A study by Hameleers et al. (2019) showed that populist messages blaming political elites negatively affected the citizens' attitudes towards the political system. Another study carried out by Matthes and Schmuck (2017) revealed that populist publications, which attributed the responsibility for social problems to immigrants and minorities, activated negative attitudes towards these groups.

If populist social actors show a preference for social media due to its direct nature and lack of professional mediation, various studies have shown that, similarly, at the base, individuals with populist sentiments tend to privilege some types of media over others as a source of information. Populist individuals tend to prefer tabloid newspapers, commercial television and content broadcast on social media, particularly on Facebook. In addition, evasion trends are expected concerning quality (so-called reference) newspapers and public information service news, which the populist actors associate to vested interests and manipulated information. Other relevant characteristics of individuals with populist sentiments are their “political reluctance” (Mudde, 2004), along with feelings of anomie and lack of political effectiveness, which together involve a certain degree of alienation as to public and/or political affairs. Thus, these individuals are part of a group that is available to be mobilised rather than the author of its own initiatives. At the same time, disinterest and avoidance of political information tend to emerge, associated with hard news. This tendency towards evasion can be reinforced by the frequent messages of reproach against the reference information media, coming from populist actors and spread by other individuals with populist sentiments, and who allege the existence of an alliance between these media and the elites against the interests of the people (Krämer, 2014). To the extent that individuals internalise this perception, they will move away from the mainstream news — or, at least, its consumption will be marked by scepticism and an adversarial attitude.

2.3. COVID-19 AND CONSPIRACY THEORIES

The current context, with a pandemic crisis with consequences in multiple dimensions of social life (from purely health to the economic, labour, affective, and social

realm), has highlighted the importance of analysing the relationship between populism and misinformation and on how it develops in the new communication channels. Several studies have valued the role of social media as a focus of misinformation. More specifically, Valenzuela et al. (2019) suggest the existence of a positive association between the use of social media and the sharing of incorrect information. Anspach and Carlson (2020) noted a greater propensity for users of social media, such as Twitter and Facebook, to be misinformed, then tending to “report factually incorrect information” (p. 697). Based on data collected very recently, already during the covid-19 pandemic, Allington et al. (2021) found that the greater the dependence on Twitter, Facebook or YouTube as main sources of information, the more likely the acceptance of the various conspiracy theories related to the pandemic.

Some reasons have been identified explaining why misinformation quickly becomes viral in the social media environment. Chen et al. (2015) claim that people share misinformation due to the specific characteristics of this type of content. Generally, misinformation content is more “interesting”, “new and engaging”, and “may be a better topic of conversation” than content made up of authentic information (Chen et al., 2015, p. 587). They also suggest that most individuals do not prioritise accuracy and authenticity when sharing information on social media. This data reinforces the thesis that most misinformation is based on conspiracy theories, which typically purport to unravel the malicious purposes of specific organisations within the system or influential individuals, thus revealing secrets and hidden stories (Craft et al., 2017). With these qualities, this type of content attracts greater attention and achieves higher levels of dissemination (Peter & Koch, 2019; Uscinski & Parent, 2014). Other studies suggest that the excessive use of social media tends to create fatigue from that same media and, as a result, makes individuals less likely to validate the truthfulness of the news they share (Ravindran et al., 2014). Later studies not only confirmed this perception but noted a positive association between the overuse of social media, the resulting fatigue, and the online sharing of fake news (Talwar et al., 2019).

Within this context, and in association with the attitudes and beliefs of a populist nature, the so-called “conspirationism” emerges. Its main features can be defined as the tendency to assume that major events impacting our lives are secretly orchestrated by powerful and malevolent entities who act together in an articulated manner (Douglas & Sutton, 2008). The idea that such actions explain social reality was influentially designated as “conspiracy theory of society” by Karl Popper (2012), and its various theses are popularly known today as “conspiracy theories”. The covid-19 pandemic and associated prevention and confinement measures created favourable conditions for the development of conspiratorial beliefs. These conditions include the feeling of physical, psychological and financial vulnerability in a framework of uncertainty drawn from impositions from formal power (government, authorities, scientific elites). Furthermore, the effects of the restrictive measures were greater on those who find themselves more fragile, more vulnerable to socio-economic circumstances, who are, in many cases, less media literate. The confinement also provided greater availability to consume online content:

individuals had more free time, were isolated and had Internet access. Based on this framework, Freeman et al. (2020) found that a significant minority of the population supports excessively sceptical views, including false conspiratorial beliefs, regarding official explanations on the covid-19 pandemic. These ideas are linked to pre-existing conspiracy theories, less compliance with government guidelines and greater scepticism about the strategies proposed by the entities responsible for health.

In fact, in online social media, this type of beliefs has emerged abundantly as an alternative explanation for the causes and facts associated with covid-19. Research conducted between April and June of the first year of the pandemic's generalisation (2020) identified a strong positive relationship between the use of social media platforms as sources of information on covid-19 and the maintenance of one or more conspiratorial beliefs, with YouTube being the most strongly associated social media, followed by Facebook (Allington et al., 2021). In a true outbreak of conspiracy theories, these types of messages pose a global threat to public health. On the second level of effects, data from the study by Allington et al. (2021) ascertained a strong connection between the belief in conspiracy theories on the virus and the practice of risky behaviours during the restrictions imposed to prevent its spread.

3. STUDY STRUCTURE AND INTEREST

Social media platforms have long been recognised as great disseminators of health misinformation. Previous studies have found a negative association between health protection behaviours and beliefs in the form of misinformation known as “conspiracy theory”. Concerns as to the dissemination of misinformation on covid-19 on social media have been widely voiced. The currentness and seriousness of this matter justify this study's intention to identify factors associated with the acceptance of misinformation (and, in particular, “conspiracy theories”) regarding the covid-19 pandemic within the Portuguese context. The importance of social media as a source in the current media ecosystem is well known. Some of the specific contents circulating therein propose themselves as alternatives to information from mainstream media and official sources. It is foreseeable that individuals with populist sentiments, who also have an adversarial attitude from the onset, display higher rates of distrust regarding formal institutions (government and the National Health Service and the way they manage the pandemic crisis). The association between populist attitudes, the valuation of information through social media and the acceptance of misinformation — namely of some of the theses classified as “conspiracy theories” is also described. Thus, after testing and evaluating the association between the factors mentioned above, we believe that the results of this study may provide valuable elements to gain knowledge as to the background and pre-requisites for the belief in misinformation. Lastly, this knowledge may suggest guidelines for action and, thus, constitute a positive contribution to flatten the infodemic curve.

4. RESEARCH QUESTIONS AND HYPOTHESES

The research questions that serve as a starting point for this study are the following:

Q1: Do populist sentiments have a negative impact on trust in the way the government is managing the pandemic crisis?

Q2: Do populist sentiments have a negative impact on the trust in the National Health Service's ability to respond to the pandemic crisis?

Once these questions are answered, the following hypotheses are formulated:

H1: A positive association is identified between populist sentiments and social media as the main source of information on the covid-19 pandemic.

H2: A positive association is identified between the belief in “conspiracy theories” and the preference for social media as the main source of information on the covid-19 pandemic.

5. METHODOLOGY AND STATISTICAL DATA

As this is an exploratory study, the sample is convenient, not probabilistic, and was constituted using email lists and requesting disclosure through personal contact and communication networks, such as email and MSN. Thus, an online questionnaire was submitted between 26 and 31 March 2020, and 242 valid responses were obtained. This sample was considered to have relevant distinguishing characteristics, such as high use of media and greater attention to civic and social issues. Data analysis and interpretation were supported by descriptive statistics, with a simple and bivariate analysis of frequencies and qualitative variables (through contingency tables).

Demographic control variables. Two demographic control variables were included — gender and age — which were also considered to intervene in the political participation process. It was ascertained that 44% of the respondents were male and 56% female. In terms of age, they were reasonably spread out across various age groups, although there were more respondents in the 20 to 30 age group.

Distribution is the one shown in Figure 1.

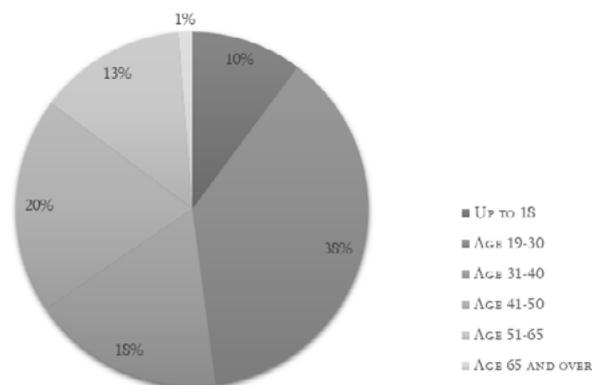


Figure 1 Age group

Political attitude. The questionnaire included some instruments for measuring core components of populism to assess the existence of populist sentiments. Using as reference the instruments consistently used in academic studies on the same subject (Mitchell et al., 2018; Newman et al., 2019; Schulz et al., 2017), the following questions were formulated:

Q1: “I think that most political representatives don’t care what people like me think?”

Q2: “I believe that ordinary people should be consulted whenever important decisions have to be made, namely through popular referenda?”

Both measures intended to capture the core ideas associated with populist ideals, namely those that reflect the antagonism between the people and the elites, the dissatisfaction with the actions of these same elites, and the importance attributed to the perspective of popular sovereignty. Each question had a response scale consisting of five points, the first two contrary to statements Q1 and Q2 (*totally disagree* and *partially disagree*), a neutral central point (*neither agree nor disagree*) and two points of agreement (*partially agree* and *totally agree*). Following the methodology applied by previous studies, these two questions were combined into a single variable with two categories. Individuals who responded that they agreed that the majority of the political representatives do not care about what people think and ordinary people should be consulted whenever vital decisions are to be made, namely through popular referenda, were categorised as having populist attitudes; all others were categorised as having mainstream attitudes.

The results obtained show the following distribution: 83 individuals (34%) have populist attitudes, and 161 individuals (66%) have mainstream attitudes. The following table (Table 1) illustrates the distribution of political attitudes by age group.

		AGE						TOTAL
		Up to 18 years	19–30 years	31–40 years	41–50 years	51–65 years	More than 65 years	
Mainstream attitudes	Frequency	19	61	24	31	24	2	161
	Political attitude	11.8%	37.9%	14.9%	19.3%	14.9%	1.2%	100%
	Age	76.0%	66.3%	55.8%	64.6%	72.7%	66.7%	66.0%
	Total	7.8%	25.0%	9.8%	12.7%	9.8%	0.8%	66.0%
Populist attitudes	Frequency	6	31	19	17	9	1	83
	Political attitude	7.2%	37.3%	22.9%	20.5%	10.8%	1.2%	100%
	Age	24.0%	33.7%	44.2%	35.4%	27.3%	33.3%	34.0%
	Total	2.5%	12.7%	7.8%	7.0%	3.7%	0.4%	34.0%

Table 1 Table of contingency with the “political attitude” and “age” variables

Trust in institutions. To measure the individuals’ trust in public institutions that combat the pandemic, we formulated two questions, one regarding trust in the government’s

action and the second with regards to the National Health Service's capacity. Afterwards, the answers were analysed according to the political attitudes of the respondents (Table 2).

		TRUST THE GOVERNMENT		TOTAL
		Yes	No	
Mainstream attitudes	Frequency	110	51	161
	Percentage	68.3%	31.7%	100%
Populist attitudes	Frequency	45	38	83
	Percentage	54.2%	45.8%	100%
		TRUST THE NATIONAL HEALTH SERVICE		TOTAL
		Yes	No	
Mainstream attitudes	Frequency	99	62	161
	Percentage	61.5%	38.5%	100%
Populist attitudes	Frequency	39	44	83
	Percentage	56.6%	43.4%	100%

Table 2 Table of contingency with the "political attitude" and "trust in institutions" variables

Main source of information. Respondents were asked about their main means of accessing the information on the pandemic. The results are shown in Figure 2.

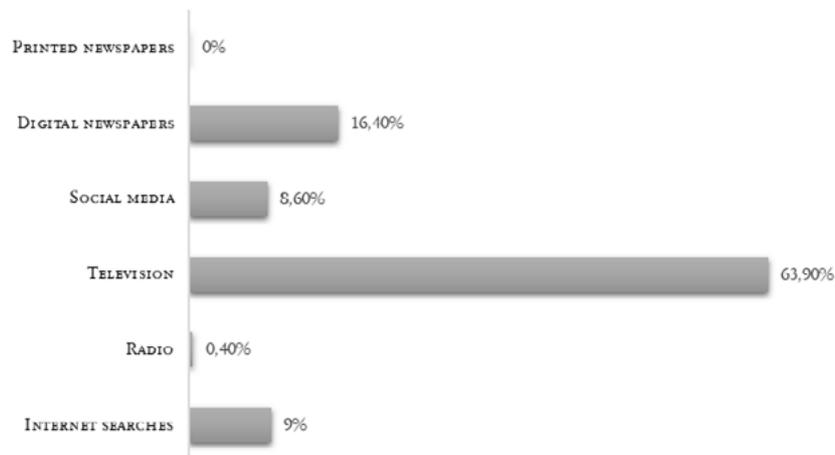


Figure 2 Among the means you used, which would you indicate as your main source of information on the covid-19 pandemic during the last few weeks?

Political attitudes and sources of information. In possession of this data, we sought to identify whether (or not) there were different preferences as to sources of information, given the political attitudes (populist or mainstream) of the individuals being studied, through a table of contingency (Table 3). In this measure, we performed Pearson's chi-squared test for the "political attitude", populist and mainstream, and "main source of information on covid-19" variables, whose results ascertained that there was a significant relationship between these two variables ($\chi^2(3)=9.657, p=0.047$).

	MAIN SOURCE				TOTAL	
	Television	Social media	Digital newspaper	Internet searches		
Mainstream attitude	Frequency	110	10	25	16	161
	Political attitude	68.3%	6.2%	15.5%	9.9%	100%
	Main source	70.5%	45.5%	62.5%	66.7%	66.0%
	Total	45.1%	4.1%	10.2%	6.6%	66.0%
Populist attitude	Frequency	46	12	15	8	83
	Political attitude	55.4%	14.5%	18.1%	9.6%	100%
	Main source	29.5%	54.5%	37.5%	33.3%	34.0%
	Total	18.9%	4.9%	6.1%	3.3%	34.0%

Table 3 Table of the contingency of the “main source” and “political attitude” variables

Misinformation. To introduce the variable related to misinformation, we intend to assess the studied individuals’ acceptance of some of the “conspiracy theories” present in the public sphere, which circulate virally on social media and are duly identified in the literature. Specifically, Christian Fuchs (2020) provided a list of “fake news on coronavirus” (p. 392); from that list, we selected three stories, set out in Table 3. The following “theories” were presented to the individuals studied, and their degree of acceptance was requested (1: *totally disagree*; 6: *totally agree*). The aggregate results (between 1 and 3: *rejects*; between 4 and 6: *accepts*) are shown in Table 4.

	ACCEPTANCE INDIVIDUALS POPULIST ATTITUDES	ACCEPTANCE INDIVIDUALS MAINSTREAM ATTITUDES
The social alarm around covid-19 has both economic and political objectives	53.0%	42.2%
Covid-19 is a way of nature rebalancing itself	43.4%	40.4%
Coronavirus is a Chinese biological weapon developed at the Wuhan Institute of Technology	41.0%	34.8%

Table 4 Conspiracy theories and their acceptance

Bearing in mind a stratified analysis, we focused on the “theory” regarding covid-19, which, following the list collected by Fuchs (2020), seems the most widespread: “coronavirus is a Chinese biological weapon developed at the Wuhan Institute of Technology”. The valid answers, 243, were organised in 153 responses disagreeing (63%) and 90 responses agreeing (37%). Next (Table 5), we sought to ascertain if there was an association between the acceptance of this theory and the main source that the individuals chose to get information on the pandemic.

		MISINFORMATION: BIOLOGICAL WEAPON		TOTAL	
		Yes	No		
Main source	Television	Frequency	67	88	155
		Main source	43.2%	56.8%	100%
		Misinformation: biological weapon	74.4%	57.5%	63.8%
		Total	27.6%	36.2%	63.8%
	Social media	Frequency	11	11	22
		Main source	50.0%	50.0%	100%
		Misinformation: biological weapon	12.2%	7.2%	9.1%
		Total	4.5%	4.5%	9.1%
	Digital newspaper	Frequency	7	33	40
		Main source	17.5%	82.5%	100%
		Misinformation: biological weapon	7.8%	21.6%	16.5%
		Total	2.9%	13.6%	16.5%
	Internet searches	Frequency	4	20	24
		Main source	16.7%	83.3%	100%
		Misinformation: biological weapon	4.4%	13.1%	9.9%
		Total	1.6%	8.2%	9.9%

Table 5 Table of the contingency of the “main source” and “misinformation: biological weapon” variables

Next, we carried out Pearson’s chi-squared test for the “misinformation: biological weapon” and “main source for information on covid-19” variables, whose results identified that there was a significant relationship between them, the levels of acceptance of that information and the main source used ($\chi^2 (3)=15.093, p = 0.05$).

6. DISCUSSION

By revealing a categorisation of 34% of individuals with populist attitudes, the sample studied identified a significantly low figure if we consider data from other studies. Data from the *Reuters Institute Digital News Report 2019* (Newman et al., 2019), by Reuters Institute for the Study of Journalism, with the same measures, showed a figure of 73% for our country. Even for the country identified with the lowest figure of populist attitudes, Denmark, the figure found was 42%, 8% above the data found in this study. We considered some bias in the sample as an explanatory hypothesis due to its size and construction methodology (“snowball” technique). However, above all, we considered that the attitudes were measured during a particular crisis situation. Data from the *Edelman Trust Barometer* (Edelman, 2020) Spring update dedicated to trust during the covid-19 pandemic revealed a dramatic change compared to January’s data: trust in the group of governments studied rose by 11%, making them the most trustworthy institution for the first time in the 20 years during which this centre has carried out these studies. The data from the study, however, reveals less trust in how the government is managing the situation of pandemic crisis by individuals with populist sentiments compared to individuals with mainstream sentiments (54%–68%) and, also, a lower degree of trust in the

response capacity of the National Health Service (47%–61%). The percentage point differences indicated, exactly 14% in both cases, have statistical significance and allow for an affirmative answer to research questions 1 and 2 on the impact of populist sentiments on the trust in social institutions (political and health), thus, being in line with the references identified in the literature.

Crossing the “political attitude” and “main source” variables shows that almost all media is chosen by a higher percentage of individuals with mainstream attitude. These results are in line with a trend towards increased trust in authorised sources in times of greater risk and uncertainty, such as those that marked this study. The exception is the “social media” source: the individuals that indicate it as their main source are divided into 45.5% with mainstream attitude and 54.5% with populist attitude. After breaking down this analysis, it was ascertained that 6.2% of the individuals with mainstream attitude elected social media as the main source compared to 14.5% of the individuals with populist attitude. This data confirms what we identified in the literature presented above, which refers to the preference of populist individuals for tabloid newspapers, commercial television and, increasingly, for content distributed through social media. The data, thus, allows validating hypothesis 1, which suggests a positive association between populist sentiments and the use of social media as the main source to obtain information on covid-19.

Likewise, the analysis of the behaviour of individuals, when faced with the theses that we associated with conspiracy theories, revealed results in line with other results that we cited throughout this study. Namely: with regards to the conspiratorial belief “coronavirus is a Chinese biological weapon developed at the Wuhan Institute of Technology”, it was rejected mainly by individuals whose main source was any media, except those who elected social media, in which case the percentage of acceptance and rejection (50% each) was the same. It should also be noted that rejection values are exceptionally high in media that imply greater selectivity and an active attitude in the search for information (digital newspapers, 82.5%, and internet searches, 83.3%), compared to the information media whose consumption tends to be passive and accidental (television and social media). The statistical test proved a significant association between the “source” and “misinformation” variables, positively correlated. This data validates hypothesis 2, which suggests the association between the use of social media as the main source of information on covid-19 and the acceptance of content associated with conspiracy theories on that same issue.

7. STUDY LIMITATIONS

We highlight some critical limitations of the present study, which deserve consideration in future developments due to analysis insufficiencies and the biases they may have caused. First, the non-segmentation of the content presented on social media (where anonymous rumours co-exist side by side with mainstream media publications) and on television (where the variety of informational, opinion or entertainment content

also co-exists). Secondly, social media has developed credible information mechanisms on the pandemic, supported by accurate information, automatically highlighted in each user's feed. At the same time, they created mechanisms to scrutinise and report false information, actively collaborating in the fight against the dangers of infodemics. The WHO, in turn, started a dedicated messaging service on WhatsApp and Facebook in Arabic, English, French, Hindi, Italian, Spanish and Portuguese, intending to convey reassurance and correct information on the pandemic (Sahni & Sharma, 2020). The effects of these actions were also not considered by this study. Lastly, the demographic data collected (age and gender) did not allow identifying significant differences in the use of the various means and the trust attributed to them, so it would be helpful to consider other untested variables (education, income, among others). This limitation is proven by the results of recent studies (Nielsen et al., 2020), which reveal that people with low levels of formal education are more likely to rely on social media applications for information on coronavirus, also being more prone to answer simple questionnaires on covid-19 wrong.

8. CONCLUSIONS

The results point to various perceptions that cross and unite the concepts designated in this study: populism, media choice, and conspiracy theories. In pandemic times, having just entered the state of emergency and mostly confined, individuals questioned consumed information from all available sources (television, social media, digital newspapers, and the internet). However, they attributed greater credibility to conventional means of information — to television and newspapers. Social media, despite being regularly consulted, only deserved the trust of a minority. We highlight the determining role that individuals continue to assign to the professional mediators — despite the continuous torrent of information to which they are exposed, television continues to be the reference source of information. Digital newspapers largely supersede the importance they attach to unfiltered professional and deontological information that crosses social media. Thus, we can suggest elements that point towards digital literacy skills — having ascertained that there is an attribution of a hierarchy in information — with journalism obtaining greater credibility than what is conveyed by social media.

We clearly note that populist attitudes will not be the only or even the strongest predictors of acceptance of conspiratorial beliefs on covid-19; to this extent, identifying other relationships will be a task for future research in order to propose answers and communication strategies suitable to new situations of unprecedented global crisis, as in the present case. Nevertheless, this study identified the association between political attitudes of populism and the choices that individuals value to be informed about the disease. Individuals with populist sentiments tend to privilege social media as a source of information; individuals with mainstream attitudes prefer to rely on professional information resources. In line with the literature presented, this study suggests that individuals with populist sentiments tend to move away from mainstream information media — which the populist ideology described as close to the elites and associated with vested

interests. In addition to informational preference, the remaining data that characterise individuals with populist sentiments are consistent with each other — greater distrust of government officials and the capacity of the National Health Service, accompanied by a higher percentage of acceptance of misinformation and source selection profile. As a result, these individuals will find themselves in a situation of greater vulnerability to the infodemic outbreak to which they are exposed. These individuals are the ones who least reject false theories, in this case about the pandemic, its causes and its nature. More specifically, the data in this study confirms a relatively stable perception: that when used as a source of information, social media can represent a significant risk to public health, as two interconnected roles are developed, with non-negligible consequences: the role of disseminator of false and conspiratorial beliefs and of discrediting official messages on the battle against the disease.

Lastly, we have identified what constitutes, in our perspective, the most relevant contribution of the present study and which crosses the complementary and interconnected scientific fields of studies of the media (from media education to media literacy) and political studies (from citizenship practices to political participation). By showing the association between populist attitudes and the selection and importance of information sources, the results of this study show the vulnerability of these individuals when faced with misinformation and conspiratorial beliefs, with consequences in terms of the formation of their opinion and the public action that they will carry out. Times of crisis exacerbate the effects of this process, as well as its social impact. We know that the perceptions of risk, not actual risk, determine how people react to crises. Factual information, but also the various types of wrong information (inaccurate and purposefully false information), when accepted as valid, shape the way people understand and respond to this public health crisis, as well as their assessment on how institutions are handling it. That has a practical implication: these perceptions point to the importance (and the need) of media literacy actions that provide individuals with mechanisms for measuring the credibility of the information sources. Knowing that conspiratorial beliefs can be easily spread through social media, working on groups that are more likely to obtain information on social media is positive for breaking this vicious circle of misinformation. By identifying factors that influence this circle, this study will make a positive contribution towards designing strategies that mitigate the risks and threats that this same process contains — thus, favouring the flattening of the infodemics and misinformation curves.

Translation: ABC Traduções

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CRITICAL REVIEW: A REVIEW OF THE STUDIES ABOUT THE USAGE OF SOCIAL MEDIA DURING THE COVID-19 PANDEMIC

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ABSTRACT

Since the coronavirus disease (covid-19) was declared a public health emergency of international concern by the World Health Organization in January 2020, it has led to the loss of millions of human lives and a global economic recession. Recently, there has been a recognized need for effective health communication via social media to deliver accurate information and promote pertinent behavioral change. Thus, this study provides a systematic review to explore what has been done, what conflicts exist, and what knowledge gap remains in terms of social media use during the covid-19 wave, indicating relevant communication strategies. This research is based on 76 relevant papers taken from searches on the Web of Science and Google Scholar. The analysis revealed that much of the literature confirms the positive effect of social media on information propagation and promotion of precautions in the control of covid-19. The spreading of rumors, especially about government performance, in social media is clearly of increasing concern. Currently, heated debate continues about the association between exposure to social media and public mental health. Another fiercely debated question is whether rumors are shared more widely than fact-checking information. Up to date, far too little attention has been paid to information disparities and vulnerable groups on social media.

KEYWORDS

social media use, risk health communication, covid-19

REVISÃO CRÍTICA: UMA ABORDAGEM AOS ESTUDOS SOBRE O USO DOS *MEDIA* SOCIAIS DURANTE A PANDEMIA COVID-19

RESUMO

Desde que a doença coronavírus (covid-19) foi declarada como uma emergência de saúde pública de interesse internacional pela Organização Mundial da Saúde em janeiro de 2020, levou à perda de milhões de vidas humanas e à recessão económica global. Cada vez mais, é reconhecida a necessidade de uma comunicação em saúde eficaz através dos *media* online, que possa fornecer informações credíveis e promover mudanças de comportamento relevantes. Assim, este estudo faz uma revisão sistemática da literatura, para compreender quais os conflitos de posição que existem e que lacunas de conhecimento permanecem em termos de uso dos *media* sociais durante a primeira vaga de covid-19, bem como indicar estratégias de comunicação relevantes. Esta pesquisa recolheu 76 artigos relevantes através de pesquisas na Web of Science e no Google Scholar. A análise revelou que grande parte da literatura veio confirmar o efeito positivo dos *media* sociais online na propagação de informações e promoção de precauções durante

o controlo do covid-19. A propagação de rumores e a intervenção do governo nos *media* sociais têm aumentado as preocupações dos utilizadores. Atualmente, o debate continua sobre a associação entre a exposição aos *media* sociais e a saúde mental pública. Outra questão muito debatida é se os rumores são partilhados de forma mais ampla do que as informações verificadas e creíveis. Até agora, muito pouca atenção tem sido dada, nos *media* sociais, às disparidades e lacunas de informação e também aos grupos vulneráveis.

PALAVRAS-CHAVE

utilização de *media* sociais, comunicação de risco em saúde, covid-19

1. INTRODUCTION

The mysterious emerging pandemic threat of coronavirus disease (covid-19) has currently crossed seven continents worldwide. By November 2020, the coronavirus pandemic had infected up to 62,000,000 people and caused over 1,400,000 deaths (World Health Organization, 2020). Given the rapid development of mobile technologies, the investigation of social media use during a public health crisis is a constant concern within health communication. It is becoming extremely difficult to ignore the critical roles of social media platforms during a public health emergency, including the spread of timely information, addressing rumors, and bridging the public knowledge gap (Eckert et al., 2018). On the one hand, when faced with an unprecedented global health threat, more people prefer using social media platforms to receive timely news on the pandemic (Farooq et al., 2020). On the other hand, social media plays several positive roles during a lockdown in providing social support and raising public awareness (Saud et al., 2020). Moreover, authorities have widely utilized social media to handle public uncertainty, convey updated regulations, and earn public trust (Finset et al., 2020).

Taken together, since the covid-19 outbreak, effective health communication via social media has been recognized as a crucial factor for facilitating information propagation, promoting public preventive behaviors, and even saving lives. Up to now, recent discussions about health communication via social media in the context of covid-19 can be summarized into three aspects: (a) exploration of the characteristics of online information, including its scale, format, frequency, content, communicator, credibility, or impact (e.g., Rafi, 2020); (b) investigation of the user profile, such as demographic features, motivation, preference, engagement level or emotional expression (e.g., Apuke & Omar, 2020); (c) evaluation of the efficacy of social media-based health interventions by measuring what changes occur in terms of knowledge, awareness, beliefs, behavior and social norms (e.g., Malecki et al., 2021).

Although extensive research has been carried out, few studies draw on any systematic review. Hence, this paper aims to provide a systematic overview of the literature focusing on what has been done, what the trends will be, what conflicts exist, and what knowledge gaps remain in the domain of health communication via social media during the ongoing covid-19 pandemic. Then, it highlights the potential for social media to

impact the control of covid-19, learn lessons, and better understand the relevant communication strategies.

1.1. THEORETICAL CONTEXT

Health communication, health literacy, and social media's role in this context is a theoretical area growing widely in social sciences. Moreover, the pandemic situation has amplified the importance of this area of knowledge, which is undergoing rapid development. Until very recently integrated into a broader context of literacy and "knowledge" or "information" on health, the current approach is increasingly focused on the autonomy of individuals in dealing with their health and their family's. That is due to economic reasons, naturally, and the actual evolution of modern societies and their self-perception as individuals and within a community (Castells, 2002). Social media are the best example of this phenomenon. Until very recently integrated into a broader context of literacy and "knowledge" or "information" on health, the current approach is increasingly focused on the autonomy of individuals in dealing with their health and that of their family. That is due to economic reasons, naturally, and the actual evolution of modern societies and their self-perception as individuals and within a community (Castells, 2002). Social social media are the best example of this phenomenon.

Individual health and its daily management have never involved as much information as in present days. Large amounts of information about health and medicine are provided from a variety of sources — whether professional health sources, specialists of various types, public and private institutions, or groups of patients and/or consumers — through a plethora of information channels, both arising from the media and local or interpersonal sources, in interaction with doctors and other health professionals, family members, friends, work colleagues, and more. This constant flow of information encourages individuals to be responsible for their health and their family's daily (Kivits, 2004). At the same time, the media coverage of health-related issues implies that we should address this topic by relating studies on the sociology of health with studies on media and communication. Ishikawa and Kiuchi (2010) highlight that while health professionals have, historically, been the primary sources of medical and health information, the means of communication such as the internet have expanded and implemented the appearance of other sources of information aimed at the general public. Some researchers have stressed that the study of health communication, as well as health literacy, should be considered not only as a feature of the individual but also as a feature of the individual's interactions in her/his social and health contexts (Ishikawa & Kiuchi, 2010; Nutbean, 2006), where social media are the best example. The process of individual empowerment in health literacy development constitutes one of the major objectives of communication in health (Ishikawa & Kiuchi, 2010; Nutbean, 2006).

In this context, and to guide this literature review, the starting question we pose is whether the academic literature produced on this topic can reflect the growing importance of social networks in empowering citizens, on health literacy, particularly in a pandemic context.

2. METHODS

2.1. SEARCH STRATEGIES, INCLUSION CRITERIA, AND DATA EXTRACTION

We reviewed articles published since the early stages of the covid-19 outbreak, including systematic reviews and original studies. The search was conducted using the search terms indicated in Table 1 on the Web of Science and Google Scholar database throughout November 2020. We looked for search terms in social media with covid-19-related health communication. We also searched the references of included articles to strengthen our work with, particularly pertinent studies. All selected articles were published in peer-reviewed journals, which makes it possible to trust the relevance, namely of the research methods and techniques used in the studies on which the articles are based.

SOCIAL MEDIA	PANDEMIC	HEALTH COMMUNICATION
Twitter/Facebook/TikTok/Instagram /YouTube/Sina microblog/WeChat News/(Re)Tweet/Posts/SMS/MIMS New media	COVID-19 Coronavirus SARS-CoV-2	Health campaign/program Health intervention

Table 1 Search terms

As our primary focus in this review refers to social media use in the field of risk health communication during the covid-19 pandemic, we defined social media as mobile and interactive platforms where users can exchange, share or create ideas and content (Dollarhide, 2019). Moreover, risk health communication has been defined as the process regarding the exchange of information and risk management during a public health crisis to increase public awareness, protect public health and facilitate the propagation of preventive measures (Schiavo, 2013).

To be included, studies should (a) analyze the propagation of information related to covid-19 on social media platforms, or (b) discuss the characteristics of users or communicators on social media platforms during the outbreak of covid-19, or (c) assess the impact of covid-19-related health communication via social media platforms. Hence, some articles were excluded, such as articles investigating distance teaching via social media, discussing data track technologies, and highlighting racism or brand marketing on social media platforms. There were no limits as to language or method.

After removing irrelevant studies, we reviewed the keywords and abstracts of the selected articles to confirm their eligibility. Then, we extracted the descriptive data from the approved studies into tables, including title, type of article, publication date, language, country focus, methodology, and sample size. In addition, the main discussions and findings were broken down according to the five words that begin with the letter W (5Ws) in communication: on *which* social media platform, *who* communicates, communicates *what*, to *whom*, and *with what effect*.

3. RESULTS

Primary literature search through the different databases totally yielded 106 relevant studies. Then, the data was cleaned to remove unnecessary and duplicated studies. Finally, 76 studies met our inclusion criteria, comprising 73 original articles and three reviews.

3.1. DESCRIPTIVE RESULTS

The data in Figure 1 indicates that recent trends have led to an increasing interest in using social media platforms in public health communication during the covid-19 pandemic. Of the 76 studies included, 71 are English, four are Spanish, and one is Portuguese.

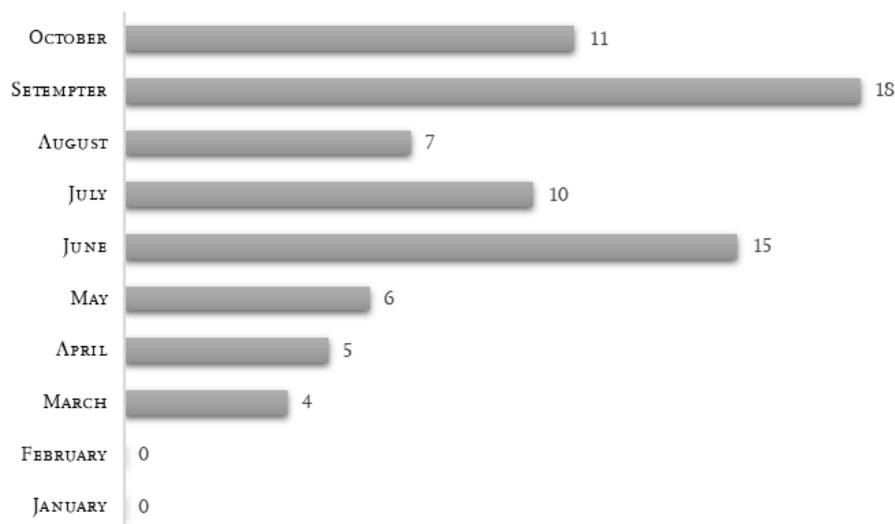


Figure 1 Date of first publication online of 76 studies

Regarding countries and social media platforms, the data in Table 2 shows that 32 of the studies were carried out at a global level, and the remaining studies selected a specific country or region as their subjects. In addition, among the included studies, 53 studies focused only on a specific social media platform, such as Twitter (19), Facebook (10), Sina microblog (nine), YouTube (nine), WhatsApp (four), TikTok (one), and WeChat (one). Other studies tend to do comparative analysis or give an overview of different platforms.

SOCIAL MEDIA FOCUS	COUNTRY FOCUS
	Global level 11
Mixed social media platforms (n = 22)	Specific countries (n = 11) America (two), Poland (one), China (one), Indonesia (one), Nigeria (one), Italy (one), Japan (one), Spain (one), United Kingdom (one), Iraq (one)
	Global level 10
Twitter (n = 19)	Specific countries (n = 9) America (three), South Africa (one), Israel (one), Italy (one), South Korea (one), Chile (one), Indonesia (one)
	Global level Two
Facebook (n = 10)	Specific countries (n = 8) Papua New Guinea (one), America (one), Singapore (one), Spain (one), Philippines (one), South Pacific (one), Malaysia (one), mixed countries (one)
	Global level Zero
Sina microblog (n = 9)	Specific countries (n = 9) China (nine)
	Global level Eight
YouTube (n = 9)	Specific countries (n = 1) Spain (one)
	Global level Zero
WhatsApp (n = 4)	Specific countries (n = 4) Zimbabwe (one), Pakistan (one), Brazil (one), Indonesia (one)
	Global level one
TikTok (n = 1)	Specific countries (n = 0) Zero
	Global level Zero
WeChat (n = 1)	Specific countries (n = 1) China (one)

Table 2 Social media focus and country focus of 76 studies

Regarding methodologies, 30 studies employed a mixture of qualitative and quantitative methods, including content analysis, sentiment analysis, and network analysis. Qualitative and quantitative content analysis has been mainly applied because this is suitable to code trending themes and explore the association between communication content and goals. To further investigate the most frequently discussed topics, some studies focused on social media platforms by using various hashtags or keywords, such as “#coronavirus outbreak”, “#COVID-19”, “#prevention coronavirus”, and so on, and 32 studies utilized quantitative methods to conduct an online survey and provide a descriptive analysis of public engagement. Qualitative methods have been employed in 14 studies to do thematic analyses or discuss content characteristics on social media platforms.

3.2. SYNTHESIS OF MAIN DISCUSSIONS AND FINDINGS

Regarding communicators, 10 of the articles focused on the performance of governments and health authorities in social media. In tandem, several studies pointed out that public health agencies should take full advantage of social media and build a relationship with opinion leaders to dispel rumors and spread verified information during

the covid-19 crisis. Moreover, five studies pointed out the critical roles played by key influencers in social media platforms, such as the Indonesian President Joko Widodo, vloggers, athletes, and healthcare professionals. In this regard, some studies have found that opinion leaders in social media can contribute to the rapid dissemination of targeting recommendations and promote public engagement. Only two studies discussed the role of closed groups during the fight against covid-19.

Regarding online messages, 12 articles focused on rumors and misinformation diffusion on social media, involving conspiracy theories, vaccines, and 5G technology. The researchers attempted to analyze the scale, frequency, main topics, and impact of these rumors, and all discussed the challenges and strategies for controlling the spreading of rumors. In the meantime, they found that rumors have been dispersed more widely during the covid-19 pandemic and negatively affect public attitudes towards updated policies and vaccines.

The remaining studies provided an in-depth analysis of online information, discussing its number, format, frequency, comments, likes, and quality and tracing the trends of hot topics. Four studies focus on content in a specific language, including Turkish videos, Spanish videos, English, Chinese and Japanese twitters. Two of the studies developed an understanding of narratives of online messages, referring to the positive tone and collective pronouns. It is worth noting that more than 10 studies emphasized the critical roles played by hashtags during information propagation. Surprisingly, only one study noted the alarming messages posted on social media platforms. One study mentioned the existing irony on Twitter.

Regarding audiences, 14 of the included studies investigated the characteristics of users by conducting an online survey or analyzing data relevant to public engagement level. The central aims of these studies involve exploring the users' motivation towards social media use and information searching or sharing. In other words, audience analysis is helpful for health agencies and policymakers to generate engaging content, provide targeting recommendations, and satisfy public needs. Although people use social media platforms to search for information and seek help, only two studies focused on vulnerable groups on social media platforms.

Regarding effect and impact, nearly half of the included studies provided empirical evidence for the claim that social media platforms have obvious advantages for spreading scientific information, providing social support, raising public awareness, and promoting preventive behavior. However, some evidence found a close association between exposure to social media and greater depression and stress of users. Similarly, the debate about information overload and misinformation on social media platforms has gained new prominence in the fight against covid-19. Despite existing studies recognizing the effect of social media on public health attitudes, beliefs, and behaviors, few of the included studies were carried out based on behavioral models (see Appendix, Table A1, for a summary of the main findings of 76 studies).

4. DISCUSSION

Generally speaking, a large volume of published studies describe social media platforms as an essential tool both for citizens and governments during the covid-19 crisis. Regarding the obvious advantages of using social media in the fight against coronavirus, it has been demonstrated that the openness and participatory nature, as well as the multimedia features of social media, could be contributing factors to deliver helpful information, facilitate interactive communication, enhance public understanding and influence health beliefs (Manganello et al., 2020). Moreover, existing studies also have found that information delivered across social media offers benefits in influencing public health awareness and ultimate behavior in the control of covid-19 (Bowles et al., 2020).

In this regard, several studies set out to examine what messages are more frequently disseminated and how user engagement levels can be increased on social media platforms. These findings are in line with earlier observations during a past global health emergency, which showed that in the context of the global epidemic, the influencing factors of effective health communication via social media include content type, content themes, hashtag use, and reliability of information source (Wong et al., 2017). In the meantime, these studies also confirm that virus transmission, precautionary measures, updated policy, and economy are the hottest topic discussed throughout social media during the covid-19 outbreak (Mutanga & Abayomi, 2020; Thelwall & Thelwall, 2020). Unlike the previous studies, one unexpected finding from our sample suggested that media richness is not an essential determinant for encouraging engagement behaviors. This result indicated that the public is more likely to pay attention to content practicality beyond entertainment when facing an unprecedented health threat (Chen et al., 2020).

Furthermore, existing studies strengthen the idea that social media is a valuable medium for government authorities to understand public opinions, create reliable information sources, dispel rumors and build trusted relationships with citizens (Sutton et al., 2020). These results are also in line with those of previous studies in past health emergencies, which indicated that governments could leverage the potential of social media to promote public communications and transform public services effectively (Kang et al., 2018). Even though government agencies are paying more attention to leveraging social media features during the fight against covid-19, researchers still note many limitations. For example, as public demand for information transparency and direct engagement has become much more significant, governments and health agencies should employ more communication strategies to promote citizens' engagement rather than releasing information on social media platforms (Chen et al., 2020; Eghtesadi & Florea, 2020).

Nonetheless, a great deal of recent research has emphasized the adverse effects of social media use during the covid-19 crisis. More quantitative evidence suggests that repeated exposure to social media is closely associated with more significant depression and fear (Pahayahay & Khalili-Mahani, 2020; Zhao & Zhou, 2020). However, other studies have mentioned that user anxiety and stress are associated with increased and decreased exposure to social media (Kligler-Vilenchik et al., 2020). This result indicates

that users can connect with others and decrease loneliness by sharing their stories while being affected by the negative feelings of other users. To date, the relationship between exposure to social media and public mental health under the context of the covid-19 threat has attracted conflicting interpretations.

Beyond that, it has been conclusively shown that repetitive alarming messages and exaggerated rumors can trigger adverse effects (Rao et al., 2020). Following the previous results, current studies have revealed that rumors were tweeted more frequently during the covid-19 crisis, substantively influencing users' knowledge and relevant behaviors (Bowles et al., 2020). In this respect, several investigations have begun to analyze the generation, transmission, and amplification of misinformation across social media platforms and examine their effects. These results are similar to those reached by previous studies, which showed that social media could be considered a primary channel for sharing and combating misinformation during global health crises (Galhardi et al., 2020). It has been found that the determinants influencing the impact of rumors include release time, users' interpersonal relationships, and content type (Bruns et al., 2020). More recently, literature has emerged that offers contradictory findings on sharing false information across social media during the covid-19 pandemic. Several studies have revealed that false information is less retweeted than evidence-based posts (Pulido et al., 2020). Conversely, some scholars believe that reliable information for combating these rumors circulates less consistently than original rumor posts through social media platforms (Rodríguez et al., 2020). Therefore, supervisors or anti-rumor accounts should reply to rumor sources timely and directly by using @ function on social media, as well as strengthening cooperation with opinion leaders to contribute not only to the rapid dissemination of science-based evidence but also to effectively control the scope of rumors (Wu et al., 2020).

These results combined provide essential insights into the use of social media during the control of covid-19. Concerning the existing knowledge gap, as social media has been considered accessible and convenient for users to express their feelings and get social support, there is very little published research on balancing the frequency of social media use and public mental health during the ongoing health crisis. Moreover, a systematic understanding of how individuals' online health literacy and cultural background influence the effectiveness of health communication via social media is still lacking. Although studies have recognized the feasibility of using social media to promote large-scale health campaigns for the population, information disparities have received scant attention in the research. Furthermore, there is a notable paucity of empirical research focusing specifically on the social media use of vulnerable groups during the covid-19 outbreak, such as people living in rural areas, low-income families, the elderly, and high-risk groups for covid-19.

5. CONCLUSION

Our study was designed for a detailed review of the research on social media use during the covid-19 pandemic, summarizing the existing conclusions and conflicts and finding the potential of social media for health campaigns against covid-19.

In reviewing the literature, many published studies consider social media the most utilized channel for individuals to obtain, generate and exchange information during this unprecedented health crisis. However, more significant efforts are needed to ensure the reliability of the information source. In addition, several studies have examined the covid-19-related online messages or misinformation that is more widely discussed across social media. These conclusions can be used to develop targeted health communication aimed at combating rumors and increasing user engagement. As people are far more likely to depend on social media when facing an unknown virus, current findings highlight the potential usefulness of social media platforms in providing emotional support and delivering social assistance. These findings imply that both the tone of messages and content type should be considered when developing health communication campaigns on social media.

The most prominent finding to emerge from this study is that governments and health agencies play a central role in improving information transparency, dispelling rumors, and raising public awareness on social media. In turn, using social media to trace public reactions can make policy processes more reasonable, contributing to improving health outcomes. Therefore, purposeful communication strategies should be used in government planning to attract more users on social media.

In the literature, the debate continues about the impact of social media use on public mental health. Another much-debated question is whether rumors are tweeted and retweeted more frequently than evidence-based information. A search of the up-to-date literature has revealed that studies about the information disparities and vulnerable groups are limited. Thus, it would be interesting to resolve the conflicts referred to by this research and bridge the existing knowledge gap in the future. Moreover, it will also be crucial for more researchers to collaborate across disciplines, including behavioral science and psychology, to investigate the influencing factors that are relevant to the effectiveness of covid-19-related health communication via social media.

Our project was limited in several ways. First, the most significant limitation lies in the fact that we could not conduct a meta-analysis to compare or evaluate the impact of different social media platforms. Secondly, the study did not compare the data on the research status in the corresponding period in past global epidemics, such as ebola and Mers-CoV. In this respect, a further systematic review comparing studies on covid-19 with past global health crises would be worthwhile. Finally, our study would have been enriched by a search of relevant studies in more databases. Therefore, future reviews covering a broader range of studies could shed further light on health communication via social media during the covid-19 wave.

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APPENDIX

	KEY FINDINGS	STUDY
	<i>Governments and health agencies</i> Effective health communication delivered through government authorities across social media platforms is crucial to providing reliable information sources, combating rumors, and promoting public engagement during the control of covid-19. Therefore, governments should leverage the potential of social media for connecting with citizens beyond propagating information.	Chen et al. (2020), Eghtesadi and Florea (2020), Kamiński et al. (2021), Manganello et al. (2020), Raamkumar et al. (2020a), Raamkumar et al. (2020b), Rao et al. (2020), Sutton et al. (2020), Pérez-Escoda et al. (2020), Pena-y-Lillo (2020)
Communicator	<i>Influencers</i> The impact of opinion leaders who have many followers on social media platforms is higher in delivering information and affecting public awareness. However, much of their posts only provide entertainment rather than helpful knowledge. Thus, governments should strengthen cooperation with key influencers to facilitate information propagation and dispel misinformation.	González Romo et al. (2020), Ngai et al. (2020), Prayoga (2020), Yin, Xia et al. (2020), L. T. Zhang et al. (2020)
	<i>Others</i> Many users have been using social media to deliver information and are more engaged in generating content during the covid-19 crisis, which could be beneficial to the control of covid-19 worldwide. It is imperative to focus on the impact of youth and women who participate in information generation actively throughout social media during the wave of covid-19.	Docimo et al. (2021), Dwyer and Minnegal (2020), López-Carril and Anagnostopoulos (2020), Mohamad (2020)

	<p><i>The characteristics of online messages</i></p> <p>During the wave of covid-19, the main topics discussed most frequently across social media include virus transmission, vaccination, preventive measures, updated policies, and economic news. The emotional tone, hashtags, and the reliability of online messages are considered crucial determinants in influencing public attitude and user engagement levels. Several studies have revealed that online messages positively influence bridging the knowledge gap and promoting public behavioral changes. In addition, it has been shown that high-quality content can achieve a greater number of retweets.</p>	<p>Abd-Alrazaq et al. (2020), Ataç et al. (2020), Basch et al. (2020), Dutta et al. (2020), El-Awaisi et al. (2020), García and Majuelos (2020), Hernández-García and Giménez-Júlvez (2020), Kamiński et al. (2021), Lázaro-Rodríguez (2020), Leelawat et al. (2020), L. Li et al. (2020), Y. Li et al. (2020), Lu et al. (2020), Ma et al. (2020), Mohamad (2020), Mutanga and Abayomi (2020), Orduna-Malea et al. (2020), Ruffer et al. (2020), Schwenk et al. (2020), Szmuda et al. (2020), Thelwall and Thelwall (2020), Trajkova et al. (2020), Wicke and Bolognesi (2020), Yin, Lv et al. (2020)</p>
What communicates	<p><i>Rumors and misinformation</i></p> <p>The spreading of rumors is increasing at an alarming rate, including about covid-19 vaccination, 5G technology, and other conspiracy theories. It has led to public depression and anxiety and exerted a negative influence on public precautionary behavior. The key factors influencing the impact of rumors include release time, content type, and communicators' interpersonal relationships. There is an urgent need to address the problems caused by exaggerated rumors and false information on social media. Here, government agencies and opinion leaders should shoulder more social responsibilities and put forward more targeted strategies. Public online health literacy should be improved.</p>	<p>Bowles et al. (2020), Bruns et al. (2020), Cinelli et al. (2020), Galhardi et al. (2020), Khosla and Pillay (2020), Kouzy et al. (2020), Malhotra (2020), Pulido et al. (2020), Rodríguez et al. (2020), Rovetta and Bhagavathula (2020), Viswanath et al. (2020), Wu et al. (2020)</p>
	<p><i>Alarming and reassuring messages</i></p> <p>During the early stages of the covid-19 outbreak, there was a high volume of alarming messages about virus transmission, prevention, and the economy on Twitter. In the following weeks, this gave way to gradually increased reassuring messages. The tone of alarming and reassuring messages exert influence on public attitude. Thus, it is vital to balance the alarming tone by delivering more messages of reassurance in order to mitigate public depression and uncertainties when facing the unknown virus.</p>	<p>Rao et al. (2020)</p>
	<p><i>Others</i></p> <p>Irony widely disseminated across social media platforms present personal expressions and attitudes towards the social distance.</p>	<p>Vicari and Murru (2020)</p>
To whom	<p><i>Audience profile</i></p> <p>Users are more likely to depend on social media to search or share information during an unprecedented health crisis. The main motivations behind social media use involve obtaining scientific knowledge, maintaining social interaction, and expressing personal feelings.</p>	<p>El-Awaisi et al. (2020), Glowacki et al. (2021), Igartua et al. (2020), Islam et al. (2020), Kligler-Vilenchik et al. (2020), Kim (2020), Q. Li et al. (2020), Liao et al. (2020), Murri et al. (2020), Riehm et al. (2020), Rovetta and Bhagavathula (2020), Saud et al. (2020), Szmuda et al. (2020), Yang et al. (2020)</p>
	<p><i>Vulnerable groups</i></p> <p>During the covid-19 crisis, health communication efforts targeted to persons with diabetes on Facebook were positive. The videos aimed at providing specific information to dental practitioners exert a positive influence.</p>	<p>Isip-Tan et al. (2020), Yüce et al. (2021)</p>

	<i>Positive impact</i> Online messages, interactive activities, and better government performance on social media positively affect the health outcomes surrounding the control of covid-19. Exposure to social media is beneficial to mitigate loneliness.	Ahmad and Murad (2020), Azizan et al. (2020), Burzyńska et al. (2020), Obi-Ani et al. (2020), D. Zhang et al. (2020)
Impact	<i>Negative impact</i> The contradictions between public officials' responses and individuals' responses on social media can cause public fear and breach of trust. Misinformation, information overload, and conspiracy theories have an adverse effect on public attitude and behavior around the control of covid-19. Additionally, it has been shown that exposure to social media is associated with public depression.	Ahmad and Murad (2020), Manganello et al. (2020), Pahayahay and Khalili-Mahani (2020), Rao et al. (2020), Sasaki et al. (2020), Zhao et al. (2020), D. Zhang et al. (2020)

Table A1 Summary of key findings of 76 studies

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WHO DO THE PORTUGUESE TRUST? GOVERNMENT COMMUNICATION MANAGEMENT IN THE COVID-19 PANDEMIC

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ABSTRACT

In a health emergency situation, the degree of public compliance with orders from health authorities and governments can significantly affect the course of the pandemic. Based on the assumption that (non-)compliance with the authorities' recommendations is directly linked to trust in the sources of information, in this article, we discuss the concrete case of the Portuguese government communication during the beginning of the second wave of the disease. In the context of an international investigation of the European Public Relations Education and Research Association *Com-Covid* network, an online survey was applied to 460 Portuguese citizens between October 7 and November 11, 2020. For this paper, we analyzed a section of the survey with questions regarding the sources of information that inspire greater confidence among the Portuguese population and their opinion on the management of government communication. The surveys were coded and entered in the SPSS statistical software. The study concluded a positive perception of government communication among respondents but that the Portuguese consider healthcare personnel to be more reliable sources of information than the media or government authorities. Regarding the gender issue, it was concluded that women trust the government more and have a better opinion about the authorities' communication. Regarding age, it was found that young people are the ones who trust more the authorities and the media, while at the same time being the most critical of the government's performance in managing the crisis. In general, respondents showed little confidence in digital social networks and digital influencers as a source of information about covid-19, and the higher the academic degree, the lesser confidence respondents have in influencers and digital social networks.

KEYWORDS

communication, trust, covid-19, source of information, Portugal

EM QUEM CONFIAM OS PORTUGUESES? A GESTÃO DA COMUNICAÇÃO GOVERNAMENTAL NA PANDEMIA COVID-19

RESUMO

Numa situação de emergência sanitária, o grau de cumprimento público das ordens governamentais das autoridades de saúde pode afetar grandemente o curso da pandemia.

Partindo do pressuposto que o (in)cumprimento das recomendações das autoridades está diretamente ligado à confiança nas fontes de informação, neste artigo, discutimos o caso concreto da comunicação governamental de Portugal durante o início da segunda vaga da doença. No contexto de uma investigação internacional da rede European Public Relations Education and Research Association *Com-Covid*, foi aplicado um inquérito online a 460 cidadãos portugueses entre 7 de outubro e 11 de novembro de 2020. Para este trabalho analisamos uma secção do inquérito com questões relativas às fontes de informação que inspiram maior confiança junto da população portuguesa e à opinião dos portugueses sobre a gestão da comunicação do governo. Os inquéritos foram codificados e inseridos no software estatístico SPSS. O estudo concluiu que sobressai uma perceção positiva sobre a comunicação governamental entre os inquiridos, mas que os portugueses consideram os atores do campo da saúde fontes de informação mais confiáveis do que os *media* ou as autoridades governamentais. Em relação à questão de género, concluiu-se que as mulheres confiam mais no governo e que têm também melhor opinião sobre a comunicação das autoridades. No que concerne à idade, verificou-se serem os jovens quem mais confia nas autoridades e nos *media*, ao mesmo tempo que são os mais críticos do desempenho do governo na gestão comunicacional da crise. De maneira geral, os inquiridos demonstraram pouca confiança nas redes sociais digitais e nos influenciadores digitais como fonte de informação sobre a covid-19, sendo que quanto maior é o grau académico menor é a confiança dos inquiridos nos *influencers* e nas redes sociais digitais.

PALAVRAS-CHAVE

comunicação, confiança, covid-19, fontes de informação, Portugal

1. INTRODUCTION

Since its emergence in Wuhan, China, in December 2019, the disease caused by severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2) has brought devastating effects on societies, communities, and economies worldwide. In just 6 weeks, the new coronavirus rapidly expanded to 20 countries, prompting the director-general of the World Health Organization (WHO) to declare on January 30 2020, that the outbreak constituted a public health emergency of international concern. The global number of deaths caused by covid-19 exceeded 2,000,000 on January 30 2021, 1 year later, with more than 100,000,000 cases of infection declared worldwide; Europe being the most affected region, and Portugal leading in the number of cases and daily deaths (Center for Systems Science and Engineering, 2021).

From the outset, governments have sought to contain the pandemic by imposing restrictions on activities that require larger gatherings and allow the virus to spread rapidly. The measures included restrictions on travel, closing schools and stores, enforcing mandatory remote work and stay-at-home orders/recommendations, although with differences over time and depending on the country¹. At the same time, several awareness campaigns were put forward by official public health entities in different media, encouraging citizens to adopt preventive behaviours, particularly the use of masks, hand washing and social distancing. However, the population's responses to the appeals of governments and health authorities have significantly varied depending on the country, the evolution of the pandemic and age groups (Hale et al., 2021; Muto et al., 2020).

¹ Those variations can be seen in The Oxford Covid-19 Government Response Tracker (Blavatnik School of Government, n.d.).

Some factors may explain the non-compliance of the population with the measures required by governments — lack of trust in authorities and information sources (Muto et al., 2020; Seale et al., 2020), misunderstanding of the information received by some segments of the population, or lack of clarity in the messages conveyed by government sources (Garrett, 2020), among others.

In a health emergency situation, the degree of public compliance with the orders of health and government authorities can significantly affect the course of the pandemic, mainly when covid-19 vaccination rollout is still in its early stages. Therefore, it is not surprising that there has been an exponential increase in public health and risk communication research on the topic, both nationally and supranationally (Torres-Salina, 2020).

Starting from the assumption that (non-)compliance with authorities' recommendations is directly linked to trust in information sources, this paper discusses the concrete case of Portugal's government communication based on empirical data collected via an online survey conducted in October 2020. The main objective is to analyse whether trust in information sources influences the population's opinion on government communication strategies in response to the pandemic crisis. Framed by the literature on risk communication, this research has theoretical-practical implications. The main hypothesis is that the higher the degree of confidence in the government's official sources, the better the opinion of the Portuguese population on governmental communication management throughout the pandemic crisis.

2. LITERATURE REVIEW

2.1. COMMUNICATION AND RISK AWARENESS

Risk communication has been establishing itself as a specialised field of theory and practice (Heath & O'Hair, 2009; Lundgren & McMakin, 2013). Its development has been particularly driven by public health and food safety issues and experiences in cases of chemical and environmental disasters (Plough & Krinsky, 1987). The elaboration of communicational models that allow the development of persuasive messages to change risk behaviours (Earle & Siegrist, 2008; Witte et al., 2001) is one of the main areas of study of risk communication. In this sense, it differs from crisis communication; a field focused primarily on image/reputation repair and the definition of immediate crisis response strategies, mostly from the organisational perspective and its central figures (Benoit, 1995; Coombs, 2007).

Over the years, risk communication has been given an increasingly central role in health emergency scenarios, notably to mitigate infectious diseases (Burton-Jeangros, 2019). Risk communication is relevant to increase public awareness of the nature, magnitude, and significance of risks in the hope of reducing the likelihood of a long-term crisis (Hampel, 2006; Sheppard et al., 2012). Therefore, it requires "the effective and accurate exchange of information about health risks and hazards (...) that advances risk awareness and understanding and promotes health-protective behaviours among individuals, communities, and institutions" (Weaver et al., 2008, p. 601).

The WHO emphasises that a first step in defining any risk communication plan or strategy involves an assessment of the public's perception of risk (World Health Organization, 2020b, 2020c). Health decision-making involves considering the potential consequences or benefits of a given action (Ferrer & Kelin, 2015), and risk perception is a subjective judgement about the nature and severity of that risk (Renner et al., 2015). In addition to being influenced by the type of information consumed, risk perception may also reflect personal experiences (Wright et al., 2002). As Chen and Kaphingst (2001) spell out, we perceive a higher risk when someone close or a family member becomes ill. The perceived severity of the risk will also be proportional to the lethality rate (Slovic, 1987).

Risk communication experts have long emphasised the importance of monitoring the needs and expectations of citizen groups by providing timely, accurate, specific, sufficient, consistent, and understandable information (Anderson & Spitzberg, 2009). WHO also underlines this guideline: “the capacity to relay information quickly and clearly on different media platforms (television, radio, print, web), across cultures and in many languages is essential to the effective management of a public-health emergency” (World Health Organization, 2011, p. 116). Therefore, knowing communicational preferences, that is, how and where audiences consume information, is fundamental to any effective risk communication plan.

In risk communication situations, the selection of information sources from audiences and their perception of the reliability of information are essential factors in predicting the degree of adherence to recommended preventive behaviours (Park et al., 2019). Hence, in a pandemic context, the media play a central role. By responding to the public's need for information, they amplify the voice of the authorities and contribute to the creation of risk perception. Edelman's (2020) research, conducted in 12 countries (not including Portugal) during the second week of March 2020, confirmed the crucial role played by traditional news media during the pandemic crisis — 64% of respondents sought information from mainstream news organisations.

Theoretically, given their reach, media will be the appropriate channel to educate the public about behaviours that help reduce risk at the individual level (Gollust et al., 2009). Indeed, studies have shown that during public health crises, many of the messages disseminated by the media did not follow journalistic “best practices” or contained misinformation (Parmer et al., 2016), either in mainstream or digital media (Li et al., 2020; Malecki et al., 2020). Furthermore, the “covid-19 infodemic” has shown that audiences access information both from trustworthy and questionable sources in a digital environment and that they do not show different diffusion patterns in social media (Cinelli et al., 2020). Also, according to Edelman (2020), young adults (18-34 years old) were the group that used digital social networks the most for information on the new coronavirus.

In the case of the covid-19 pandemic, the citizens' information requirements focus mainly on knowledge about the following topics: how to protect oneself against the virus; how to stop the spreading of the virus; the strategies adopted by the government; the evolution of statistical data (number of deaths, confirmed and monitored cases, number of hospitalised and in intensive care, and recovered cases); the state and the health

service's capacity to respond to the pandemic; predictable scenarios; among others. In the Portuguese context, the daily report released by the Directorate-General for Health (Direção-Geral de Saúde; DGS) through its digital social networks and the daily press conferences, often live, have been central in disseminating information on the evolution of the pandemic (Arriaga et al., 2020). Regardless of the critical assessment of the Portuguese government's communication performance (Araújo, 2020), it is expected that these informative reports can help citizens make more informed decisions about how best to protect themselves and their communities.

2.2. TRUST AND GOVERNMENT COMMUNICATION

Communication is central to the management of any pandemic. However, despite lessons learned from other infectious diseases, for example, the 2009 H1N1 pandemic, better known as swine flu, or the ebola and zika virus outbreaks, the WHO considers that governments around the world have shown ineffective communication in cases of health emergency outbreaks (Global Preparedness Monitoring Board, 2019). In situations of public health risk, civic engagement and collective action are key (Harring et al., 2021). Therefore, governments and public authorities have a crucial role in defining communicational strategies that provoke an appropriate response from the community.

Trust in government is the foundation of collective action. As important as it is complex, the concept of trust has received various frameworks in the risk management and communication literature (Earle et al., 2010). From the receiver's perspective, there is a "widespread expectation that the message received is truthful and reliable and that the communicator demonstrates competence and honesty by conveying accurate, objective, and complete information" (Renn & Levine, 1991, p. 179). From the sender's perspective, it is expected that the more people trust public institutions and government, the more motivated they will be to follow their recommendations and make informed decisions to protect themselves, their families, and their communities (Devine et al., 2020). Studies have shown that the degree of trust in the national health care system has a significant impact on the public's willingness to receive health care instructions (Devos et al., 2002). Low levels of trust can lead the public to distance themselves from the health care system, leading to situations of neglect and non-compliance with guidelines, with severe consequences for public health (Meyer et al., 2014).

The variable trust in government has been related to the level of health compliance in other health emergencies, such as the 2009 H1N1 pandemic (Freimuth et al., 2014; Siegrist & Zingg, 2014) or the 2014 to 2016 ebola outbreak in West Africa (Blair et al., 2017). Recent studies on the covid-19 pandemic follow the same line. For example, Bavel et al. (2020) found that greater trust in government leads to greater compliance with health policies — such as being confined or quarantined, testing, and restrictions on group meetings. Another study highlights that in European countries where higher levels of trust in government had been documented prior to covid-19, there were more

significant reductions in risky behaviours, for example, less non-essential local travel during March 2020 (Bargain & Aminjonov, 2020).

When making decisions during health crises, individuals need to trust the information they receive from institutions and the spokespersons communicating that information (Abu-Akel et al., 2021). Having trust in the source of information is crucial for effective risk management and communication (Slovic, 1993). If a communicator is not deemed trustworthy, the communication strategy will likely fail (Lundgren & McMakin, 2013). That is particularly true when the risk is poorly known or too complex, as it involves relying on expert assessments rather than on one's own judgement (Siegrist & Cvetkovich, 2000).

In this regard, Edelman (2020) found that the least trusted source of information during the first weeks of the covid-19 outbreak was government officials (48%), slightly ahead of journalists (43%). In contrast, scientists, health officials, and doctors were the sources that citizens trusted the most. These data were corroborated by research from different contexts. In Spain, for example, Moreno et al. (2020) found that although at the beginning of the lockdown, the government and the covid-19 task force were the most trusted source for half of the Spanish citizens, as the pandemic progressed, this trust declined and shifted to prestigious health personalities, such as epidemiologists and the WHO's high-ranking officials. Criticism towards public authorities is often harshest in the second phase of outbreaks (Nerlich & Koteyko, 2012), a period when analyses shift to issues related to attribution of responsibility (Krimsky, 2007).

Other factors may influence (dis)trust in general and in government authorities in particular, namely, the credibility and transparency of the source. Credibility can be defined as the degree of technical expertise attributed to the source and its message (Llewellyn, 2020; Renn & Levine, 1991). Expertise is usually confirmed by the speaker's credentials, experience, and institutional affiliation (Lundgren & McMakin, 2013; Seeger et al., 2018). Transparency can stem from one's history, the source's previous behaviour in analogous situations (Earle & Siegrist, 2008). If there are reports of data omission or manipulation, subsequent messages are more unlikely to be trusted.

Given the importance of the trust factor in both information sources and government in health emergencies, and based on the literature review, two main questions (RQ) guided our research:

RQ1: Which information sources inspire greater trust among the Portuguese population?

RQ2: What is the opinion of the Portuguese on the government's communication management?

With the first research question, we intend to understand whether the Portuguese place greater trust in government authorities, national or international health experts, news media, or information about covid-19 shared on digital social networks (either by digital influencers, doctors, or other health professionals or by friends). The second research question will allow us to understand whether respondents agree that the government's communication has been reliable, clear, and timely, or whether, on the contrary, they consider that the same communication has been confusing, did not reveal the whole truth, or raised a social alarm. The central hypothesis guiding our study is the following:

H1: In the battle against the pandemic, the greater the degree of trust in the government's official sources, the better the Portuguese's opinion of their communication management.

Considering that a pandemic is a prolonged crisis during which government communication strategies change depending on the phase it is in (Reynolds & Quinn, 2008), our research delves into the opinion of the Portuguese in October 2020. This period corresponds to the beginning of the school year, when in-person classes returned, Portugal standing officially in a state of contingency due to the increase of contagions and the beginning of the second wave of the pandemic (Direção-Geral da Saúde, 2020).

3. METHODOLOGY

3.1. SAMPLE AND QUESTIONNAIRE

In the context of an international investigation from the European Public Relations Education and Research Association (Euprera) *Com-Covid*² network — a project that aims to monitor the management of covid-19 crisis communication in several countries — a survey was applied to 460 Portuguese citizens between October 7 and November 11, 2020. The sample, representing a 95% confidence level and a margin of error of 4.6% over the country's population (10,295,909 inhabitants), comprised 65.7% women and 34.3% men, with a mean age of $M = 41.01$ years ($SD = 12.09$).

This sample was reached using the snowball technique. Invitations with a link to the survey were sent out via email and digital social networks, primarily WhatsApp and Facebook. The invitation encouraged people to complete and disseminate the questionnaire to their contacts, and there was no compensation for participating in the research. The online questionnaire included questions on information-seeking behaviour, reliance on different information sources, perceptions of government communication management, message retention, and demographic questions. The survey script followed the guidelines defined in the international Euprera *Com-Covid* project.

For this paper, we analyse a section of the survey with questions concerning the sources of information that inspire more confidence among the Portuguese population and the perception of the Portuguese on the management of government communication, corresponding to two scales composed of 13 and six items, respectively. The response options for each item were operationalised by seven-point Likert-type scales, with one being the lowest and seven the highest. The items were included in two exploratory factor analyses (EFA) to reduce scale dimensions to detect associations between them and create, after the event, aggregate variables with increased explanatory value.

As shown in Table 1, each of the 13 items related to trust in information sources has a significant weight on one of the three factors suggesting EFA as latent structure (explained variation = 61.94%, $KMO = .83$, Bartlett's test: $p < .001$).

² The European Public Relations Education and Research Association *Com-Covid* network (European Public Relations Education and Research Association, n.d.) is a project aimed at monitoring the management of covid-crisis communication in several countries and from different perspectives and methodologies. In a first phase of the project, a survey was launched to monitor information channels, information sources, levels of trust and understanding of information by the general public in three countries (Spain, Italy, United Kingdom). A second survey, in October 2020, was extended to a new set of countries, including Finland, Turkey, Croatia, United States of America, Brazil, Argentina, Nigeria and Portugal.

INFORMATION SOURCES	INFLUENCERS AND RRSS (FACTOR 1)	AUTHORITIES AND MEDIA (FACTOR 2)	HEALTHCARE WORKERS (FACTOR 3)
Influencers from other fields	.877		
Alternative medicines influencers	.871		
Healthcare influencers	.763		
Friends on digital social networks	.695		
Healthcare workers disseminating information on digital social networks	.654		
Other	.612		
Government and Directorate- General for Health		.858	
Local authorities		.773	
World Health Organization		.730	
Media		.602	
Professional associations in the healthcare field			.759
Personal acquaintances from the healthcare field			.755
Prestigious figures in the healthcare field			.657
Eigenvalue	4.345	2.623	1.084
Explained variation	33.42%	20.17%	8.43%
Cronbach's alpha	.84	.77	.71

Table 1 Scope of information sources through exploratory factor analyses with varimax rotation and reliability test

The same is true in Table 2 with variables regarding the opinion of the Portuguese on the government's communication management. Each of the six items shows a significant weight on some of the two factors suggesting the EFA as a latent structure (explained variation = 69.65%; KMO = .70; Bartlett's Test: $p < .001$).

OPINION ON THE GOVERNMENT'S COMMUNICATION MANAGEMENT	POSITIVE (FACTOR 1)	NEGATIVE (FACTOR 2)
It has always been clear and sufficient	.831	
It has been the most reliable	.828	
It was disseminated in the appropriate moments	.826	
It has been confusing for the population		.827
It did not reveal the whole truth		.805
It raised social alarm		.767
Eigenvalue	2.469	1.711
Explained variation	41.14%	28.51%
Cronbach's alpha	.78	.73

Table 2 Scope of the opinion of the Portuguese on the government's communication management through exploratory factor analyses with varimax rotation and reliability test

The internal consistency of each factor, measured with the statistical parameter Cronbach's alpha (α_c), revealed adequate reliability in all cases (Hair et al., 1999; Robinson et al., 1991).

3.2. ANALYSIS AND RESULTS

All surveys were conducted using Google Forms and then coded and entered into the SPSS (Statistical Package for the Social Sciences, version 24). We calculated a metric for each factor based on the average of the items that compose it, detected in the EFAs (Tables 1 and 2 above). These new indices were used, in turn, to carry out different descriptive and inferential tests (repeated measures ANOVA, Student's *t*, Pearson's *r*).

After the statistical treatment of the data extracted from the 460 questionnaires, it is possible to establish three types of primary sources of information, presented in Table 3 next to the specific items that compose them, ordered according to the average confidence of the respondents regarding these sources.

INFORMATION SOURCES	N	M	SD	PERCENTAGE OF HIGH CONFIDENCE*
Influencers and RRSS (factor 1)	460	2.19	1.07	
Healthcare workers disseminating information on digital social networks	460	2.65	1.68	15.7
Friends on digital social networks	460	2.43	1.35	7.5
Healthcare influencers	460	2.37	1.51	11.8
Other	460	2.20	1.58	9.1
Alternative medicines influencers	460	1.82	1.28	5.2
Influencers from other fields	460	1.67	1.13	3.5
Authorities and media (factor 2)	460	4.60	1.26	
World Health Organization	460	5.15	1.71	68.9
Government and Directorate-General for Health	460	5.02	1.69	69.1
Local authorities	460	4.31	1.65	51.2
Media	460	3.94	1.56	38.3
Healthcare workers (factor 3)	460	4.79	1.37	
Prestigious figures in the healthcare field	460	5.07	1.70	69.5
Professional associations in the healthcare field	460	4.71	1.67	61
Personal acquaintances from the healthcare field	460	4.60	1.80	56.8

Table 3 Descriptive statistical data of the information sources and the items that compose them

Note. * Combined percentage of respondents who expressed *quite* (five), a *lot* (six) or *full* (seven) confidence in information sources.

After performing a repeated measures analysis of variation, we observed that the differences between the information sources are statistically significant [$\lambda_w = .205$, $F(2, 458) = 888.5$, $p < .001$, $\eta^2 = .795$], with “health personnel” generating the most trust in the Portuguese population (RQ_1) above “authorities and media” [$t(459) = 3.037$, $p < .01$,

$d = .144$] and “influencers and digital social networks” [$t(459) = 40.227, p < .001, d = 2.115$]. If we compare the “authorities and media” with the “influencers and digital social networks”, there are also significant differences between them [$t(459) = 33.509, p < .001, d = 2.061$].

By itself, it is the WHO ($M = 5.15, SD = 1.71$) that inspires the most trust in citizens, followed by prestigious figures in the healthcare field ($M = 5.07, SD = 1.70$) and the government and Directorate-General for Health ($M = 5.02, SD = 1.71$). Regarding the opinion of the Portuguese on the government’s communication management, it is also possible to establish two distinct opinions, which are shown in Table 4 next to the specific items that integrate them.

CITIZENS’ OPINION ON THE GOVERNMENT’S COMMUNICATION	N	M	SD	PERCENTAGE OF HIGH AGREEMENT*
Positive (factor 1)	460	4.13	1.39	
It was disseminated in the appropriate moments	460	4.33	1.61	45.9
It has been the most reliable	460	4.21	1.69	45.5
It has always been clear and sufficient	460	3.87	1.69	39.3
Negative (factor 2)	460	3.86	1.55	
It has been confusing the population	460	4.07	1.86	44.6
It did not reveal the whole truth	460	3.93	1.95	40.9
It raised social alarm	460	3.58	1.95	32

Table 4 Statistical data describing citizens’ opinions regarding the government’s communication and the items that compose them

Note. * Combined percentage of respondents who expressed *quite* (five), *a lot* (six) or *full* (seven) agreement with the statements.

We can state that there are significant differences between the opinions [$t(459) = 2.594, p < .01, d = .183$], although the scope of the effect is limited (Cohen, 1988; Johnson et al., 2008). However, the positive opinion is the most widespread among the Portuguese regarding government communication (RQ2).

On the other hand, it is found that people critical of government communication management tend to trust official government sources less [$r(458) = -.167, p < .001$]. This correlation, which is statistically significant, is negative because the more management criticism increases, the less trust is placed in the government, and vice versa (H1). In this regard, the gender issue is interesting because trust in the government is higher for women ($M = 4.71, SD = 1.23$) than for men ($M = 4.39, SD = 1.30$), and the differences are significant [$t(458) = 2.604, p < .01, d = .252$]. And there are also differences regarding opinion about government communication [$t(458) = 1.963, p < .05, d = .194$] in the same direction: women ($M = 4.22, SD = 1.35$) have a higher favorable opinion than men ($M = 3.95, SD = 1.45$).

As for age groups, this variable was initially quantitative as respondents answered with the exact age they were at the time of participating in the study. Therefore, the initial

variable was recoded into three groups: young, adult, and mature³ to allow age-based comparisons. In Table 5, we can see the comparisons that resulted statistically significant as to age groups.

COMPARABLE VARIABLES	N	M	SD	ANOVA
Trust in authorities and media				
Young	149	4.83	1.24	F (2, 457) = 3.685, p = .026, $\eta^2 = .016$
Adult	168	4.51	1.32	
Mature	143	4.46	1.19	
Total	460	4.60	1.26	
Negative opinion on government communication				
Young	149	4.02	1.58	F (2, 457) = 4.185, p = .016, $\eta^2 = .018$
Adult	168	3.97	1.57	
Mature	143	3.55	1.47	
Total	460	3.86	1.55	

Table 5 Age group comparisons of trust in authorities and average and negative opinion of government communication (ANOVA)

In both cases, young people are the ones who place higher trust in the authorities and the media, but at the same time, they are the most critical of government trust. Lastly, regarding the level of education, the contrasts are produced in the way they appear in Table 6.

TRUST IN INFLUENCERS AND DIGITAL SOCIAL NETWORKS	N	M	SD	ANOVA
No academic degree	102	2.53	1.28	F (3, 456) = 6.931, p < .001, $\eta^2 = .039$
Bachelor's degree	157	2.22	1.11	
Master's degree	100	2.01	.90	
PhD	101	1.96	.85	
Total	460	2.19	1.07	

Table 6 Trust in influencers and digital social networks as a function of education level

In this sense, the higher the academic degree, the lower the respondents' trust in influencers and digital social networks.

4. DISCUSSION AND CONCLUSION

Research on risk communication has highlighted how trust in information sources, especially in government and authorities, can affect risk perception and preventive behaviours in pandemic scenarios (Bargain & Aminjonov, 2020; Bavel et al., 2020; Lundgren

³ It was possible to recode the initial quantitative variable "age" into another ordinal qualitative variable based on three age groups of homogeneous sizes by calculating the P₃₃ and P₆₆ percentiles. Thus, the 1 = young (n = 149) from 18 to 36 years, the 2 = adult (n = 168) from 37 to 47, and the 3 = mature (n = 143) from 48 to 79 (age of the oldest survey in the sample).

& McMakin, 2013). In this context, the results discussed in this paper offer original findings regarding respondents' opinions about the Portuguese government's communication management and trust in governmental and non-governmental information sources at the onset of the second wave of the covid-19 epidemic in Portugal in October 2020.

In general, two opposing perceptions, one negative and one positive, about government communication stand out. However, the positive opinion was the most prominent among all respondents. In particular, many were those who considered that the government's information was timely and reliable. Even the most critical people, that is, those who consider that the government's communication has confused the population or has not revealed the whole truth, tend to trust the government and the Directorate-General for Health. These results allow us to discuss the risk communication advocated by the government of Portugal in a theoretical-practical dimension, besides pointing to other research paths.

First, our research allows for a reflection on the respondents' trust in governmental sources compared to non-governmental sources. The Portuguese trust healthcare personnel more, particularly prestigious personalities in the healthcare field, such as doctors, epidemiologists, or the director of the WHO. These sources of information are considered more trustworthy than the media or government authorities, both at the national (government and Directorate-General for Health) and local level. The trend, already identified in studies on the first days of the pandemic in neighbouring Spain (Moreno et al., 2020), underlines the importance of giving more prominence to expert/technical sources than political sources in managing covid-19 crisis communication. Even though 69% of the Portuguese claim to trust the government and the Directorate-General for Health as an information source, this figure allows us to infer the existence of criticism to more politicised discourses. That conclusion is in line with previous studies at the beginning of the pandemic and internationally. The Edelman (2020) study highlighted that 58% of respondents are concerned about the possibility of authorities being alarmist for political gain.

Second, the results showed the respondents' low trust in digital social networks and digital influencers as a source of information about covid-19. Trust in this type of source is lower than trust in authorities, news media, and healthcare workers. In addition, the higher the academic degree held by the respondents, the lower the trust in influencers and digital social networks. Still, the items "health staff disseminating information on digital social networks" and "digital health influencers" obtained a higher percentage of the trust. These data align with the previous conclusion, confirming that specialised personnel, such as experts, scientists, and physicians, provide more credibility to the sources, and consequently, the Portuguese trust more. In this sense, one can reflect on the government's importance in giving more room to experts in its communication strategy. After all, as Lundgre and McMakin (2013) pointed out, "information alone, no matter how carefully packaged and presented, will not communicate risk effectively if trust and credibility are not established first" (p. 20).

Therefore, the study found that the higher the degree of trust in the government's official sources, the better the opinion of the Portuguese about the government's communication management in the battle against the pandemic, thus confirming the primary hypothesis that guided this research.

Effective management of a pandemic depends on trust in the information disseminated, in the sources, and particularly in public authorities. The results of our study underline the significance of bringing the voice of health experts to the centre of communication management, avoiding the “divorce between government and science” (Fiolhais, 2021, para. 4) predicted by opinion-makers and journalists. This fact is crucial in prolonged crises such as the one we are currently undergoing, and in which the government and authorities need to continuously ensure, with different levels of intensity, compliance with prevention standards. One cannot neglect the risk that the longevity of the crisis leads to pandemic fatigue and reduced perception about the severity of the risk (World Health Organization, 2020a).

Lastly, some demographic data that emerged in this study may be relevant indicators for government communication management and point to new avenues of research. Regarding the gender issue, it was concluded that women trust the government more and have a better opinion on the authorities' communication management. In future studies, it would be interesting to investigate whether this result has to do with the fact that the prominent spokespersons of the government during the crisis, the minister of health and the director-general of health, were women. Regarding age, it was found that young people (18-36 age group) are the ones who trust the authorities and the media the most, while they are the most critical of the government's performance in communicational crisis management. Communicating effectively in situations of risk is challenging since several factors may condition its success. Distrust in authorities and failure to adapt the information to different subpopulations have been pointed out as one of the main reasons for communication failures in the context of infectious diseases (Gesser-Edelsburg & Shir-Raz, 2016). Therefore, it will be essential to develop more comprehensive reception and opinion research allowing for the cross-referencing of sociodemographic data with the issue of trust in government and health authorities. The topic of trust in politicians and rulers is well developed in studies on the quality of democracy but less common in risk communication research.

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HEALTH COMMUNICATION IN TIMES OF PANDEMIC: THE PERSPECTIVE OF PORTUGUESE NATIONAL HEALTH SERVICE USERS

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ABSTRACT

The covid-19 disease, caused by infection with the novel coronavirus (SARS-CoV-2), has introduced numerous global health communication challenges. The need for behavioral change, such as mask-wearing, hand washing, or social distancing, has become imperative to prevent the spread of this disease. Primary health care, due to its population coverage throughout the Portuguese territory and almost free of charge, plays a central role in health care provision, being the preferred contact between people and health services. The main objective of this study was to analyze, from the perspective of users of the Portuguese national health service (NHS; Serviço Nacional de Saúde, SNS), the contribution of the health center clusters, institutions responsible for primary health care in health communication regarding covid-19. Data were collected by online questionnaire from 904 users of the national health service residing in the 18 districts of Portugal between December 2020 and January 2021. Our research confirmed that health center clusters were the source of information the least sought after by users to learn about covid-19. Participants in this study also revealed that they had not received any information about the new coronavirus from their health center (80%), although they wished to have been contacted, preferably by email (87.2%), phone/mobile (36.5%), or mail (20.2%).

KEYWORDS

communication for health, primary health care, health center clusters

COMUNICAÇÃO PARA A SAÚDE EM TEMPOS DE PANDEMIA: A PERSPETIVA DOS UTENTES DO SERVIÇO NACIONAL DE SAÚDE

RESUMO

A doença covid-19, originada pela infeção com o novo coronavírus (SARS-CoV-2), introduziu numerosos desafios globais de comunicação para a saúde. A necessidade de mudança de comportamentos, como a utilização de máscara, a higienização das mãos ou o distanciamento social, tornou-se um imperativo por forma a evitar a propagação desta doença. Os cuidados de saúde primários, pela sua abrangência populacional, em todo o território português, e quase gratuidade, desempenham um papel central na prestação de cuidados de saúde, sendo o contacto preferencial entre as pessoas e os serviços de saúde. O objetivo principal deste estudo foi analisar, na perspetiva dos utentes do Serviço Nacional de Saúde, qual o contributo dos agrupamentos de centros de saúde, instituições responsáveis pelos cuidados de saúde primários, na comunicação para a saúde a propósito da covid-19. Os dados foram recolhidos por questionário

online a 904 utentes do Serviço Nacional de Saúde, residentes nos 18 distritos de Portugal, entre dezembro de 2020 e janeiro de 2021. A nossa pesquisa confirmou que os agrupamentos de centros de saúde foram a fonte de informação menos procurada pelos utentes para adquirir conhecimento sobre a covid-19. Os participantes neste estudo revelaram também não ter recebido qualquer informação sobre o novo coronavírus por parte do seu centro de saúde (80%), embora desejassem ter sido contactados, preferencialmente por email (87,2%), telefone/telemóvel (36,5%) ou correio (20,2%).

PALAVRAS-CHAVE

comunicação para a saúde, cuidados de saúde primários, agrupamentos de centros de saúde

1. INTRODUCTION

The new coronavirus, SARS-CoV-2 (severe acute respiratory syndrome), causes the infectious disease designated by the World Health Organization as covid-19 (Gorbalenya et al., 2020). This virus is directly transmitted through contact with an infected person, through “droplets containing viral particles that are released from the nose or mouth of infected people when they cough or sneeze, and can directly reach the mouth, nose, and eyes of anyone nearby” (Direção-Geral da Saúde, n.d., Como se Transmite? section). Transmission can also occur indirectly through contact with contaminated surfaces and objects (Direção-Geral da Saúde, n.d.).

On March 11, 2020, the World Health Organization formally declared the new coronavirus crisis a pandemic. As it evolved, it became urgent to ensure that credible, simple, and helpful information was available and accessible (The Lancet, 2020) as a way to combat “infodemic” — “the overabundance of information - some accurate and some not - that occurs during an epidemic. It can lead to confusion and ultimately distrust in governments and the public health response” (World Health Organization, n.d., para. 1). The infodemic spreads to people in a similar way to an epidemic, through digital information systems, such as social media, or in face-to-face contact, causing increased difficulty for “people to find trustworthy sources and reliable guidance when they need it” (Tangcharoensathien et al., 2020, Abstract section).

Last year, covid-19 introduced numerous global health communication challenges, including the need to disseminate helpful information about the new coronavirus (King, 2021); the overflow of content on this topic from various information sources (Finset et al., 2020); the uncertainty about the spread of the new virus (White et al., 2021); the increase in false information circulating on social media (Ratzan et al., 2020) or the lack of clarity in messages about changing behaviors, often contradictory (Noar & Austin, 2020).

Although health communication is only one “part of the overall solution to change the behaviors of millions of people to contain the spread of SARS-CoV-2, it is an indispensable part that will determine the success or failure of the pandemic response” (Nan & Thompson, 2020, p. 1706).

In Portugal, it is the responsibility of the health center clusters (agrupamentos de centros de saúde, ACeS), services integrated into the Portuguese national health service (NHS; Serviço Nacional de Saúde, SNS), to ensure people's first contact with health care provision (Decreto-Lei n.º 28/2008, 2008). Due to their population coverage and being almost free of charge, they should be at the right place to act for the necessary behavioral change (Peralta-Santos et al., 2018).

However, a study conducted in the first half of 2020 revealed that these institutions responsible for primary healthcare in Portugal were the source of information, the least sought-after by users to learn about covid-19 (Garcia & Eiró-Gomes, 2020a). This survey also indicated that a significant percentage of Portuguese respondents (84%) did not receive information from their health center about the covid-19 pandemic.

With this new survey, conducted in the second half of 2020, we intend to understand how the ACeS communicated information regarding the covid-19 pandemic to encourage disease prevention from the perspective of NHS users. We also intend to identify whether the ACeS are considered, by users, a reliable and helpful source of information. This study also identifies the NHS users' level of concern regarding the new coronavirus and their knowledge about the prevention measures to be adopted.

2. HEALTH COMMUNICATION AND COVID-19

In the last decades of the 20th century, numerous communicable diseases emerged, such as severe acute respiratory syndrome in 2003, the H1N1 influenza pandemic, in 2009, ebola in West Africa, between 2014 and 2015, the zika virus syndrome, between 2015 and 2016, or the yellow fever outbreak in several African countries, in 2016 (World Health Organization, 2018). Covid-19 was not the first outbreak to spread rapidly during the "media age", so health organizations were better prepared to communicate about it (Melki et al., 2020).

The World Health Organization (1998) defines health communication as a critical strategy for disseminating information about health-related issues through the media or other technological innovations. One of its main objectives is to influence the different audiences towards change at the level of knowledge, attitudes, and behaviors to improve or maintain their health (Schiavo, 2014). For this reason, communication plays an integral role in health care delivery (Thomas, 2006) by promoting risk-reducing behaviors through messages that shape the audiences' attitudes (Nan & Thompson, 2020) and facilitate the way they deal with uncertainty and fear (Finset et al., 2020).

Health behavior can be described as any activity undertaken by a person to promote, protect, or maintain health (Nutbeam, 1986). This behavior may be adopted intentionally to promote or protect health, or it may be adopted regardless of the health consequences it may have (World Health Organization, 1998).

Behavioral changes to combat the spread of the new coronavirus are well known: wear a face mask, wash hands regularly with soap and water or disinfect with a 70% concentration alcohol-based solution, cough into a disposable tissue or elbow (respiratory

etiquette), maintain physical distance between people, clean surfaces and equipment (Direção-Geral da Saúde, n.d.).

However, while the messages are simple, it does not mean they are easy to implement. “Even if we all had the same correct information, behavior change would still be challenging” (Finset et al., 2020, p. 874). The same view is shared by Noar and Austin (2020):

while frequent hand washing was a fairly standard behavior with which the public was already familiar, communication around the new key behaviors to prevent viral spread - physical distancing and masks - was unfortunately full of mixed messages and contradictions. (p. 1735)

The general information about the covid-19 pandemic has been one of the main challenges for health communication due to its excessive amount, uncertainty, or falsity, which is usually intentional (Vraga & Jacobsen, 2020). This last type of information, on the one hand, questions and contradicts the communication developed by the authorities and can “lead to a lack of trust in the institutions” (White et al., 2021, p. 218), especially when its source is not official. On the other hand, some situations, particularly in the United States, originated from the authorities’ ineffective communication that generated “great confusion and misunderstandings” (Kim & Kreps, 2020). Just recall U.S. President Donald Trump’s recommendation for the ingestion of bleach as a covid-19 preventive measure.

To combat covid-19-related misinformation, Hornik et al. (2021) recommend that campaigns to promote coronavirus protective behaviors should emphasize the respective benefits rather than debunking false claims unrelated to the disease.

Renata Schiavo (2020) also suggests that communication can contribute to combating misinformation if those most affected by the pandemic are involved:

communication can greatly contribute to addressing misinformation. To do so, we need a paradigm shift that involves those who have been most affected by the pandemic — such as low-income communities, communities of color, the elderly, and other marginalized and underserved groups — in the design of our communication efforts. Improving health and media literacy, as well as civic literacy and helping everyone understand the impact of information and policy on their lives, is also critical to this paradigm shift. (pp. 73–74)

Thus, following Schiavo’s (2020) thought, covid-19 made it evident that the low health literacy of the population is an underestimated problem worldwide (Paakkari & Okan, 2020), despite being one of the major concerns of experts over the last 20 years (Finset, 2021).

Portugal is the country with the lowest percentage of people with an excellent level of health literacy (8.6%), compared to the countries participating in the European Health Literacy Survey (Espanha et al., 2016).

With regard to health information, as an example, some authors have warned that people with an inadequate level of health literacy may not be able to understand information, despite having access to it adequately. In situations where they do not intentionally seek the information, it may be provided by the media or any other person they communicate with (Ishikawa & Kiuchi, 2010).

In the specific case of the new coronavirus, according to White et al. (2021), “levels of health literacy in communities suggest that understanding of the concept of risk is likely to be poor, and contribute to a sense of uncertainty and confusion” (p. 218).

Understanding information using, for example, terminology that is accessible to all can help people understand the reasons behind the authorities’ recommendations and reflect on the consequences of their actions (Paakkari & Okan, 2020). Thus, levels of health literacy directly influence the behavior of the population:

if there is no high level of health literacy, the population (or the individual as an autonomous citizen) will not know how to prevent a disease, how to support their treatment, how to seek available support and help, among other aspects. (Eiró-Gomes & Atouguia, 2012, p. 107)

The transmission of correct and reliable information is, however, only “the first step that leads to a change in behaviors; many others are still necessary” (Eiró-Gomes & Atouguia, 2012, p. 107) such as people’s empowerment (Nutbeam, 2000).

In the same line of reasoning, for the public to proactively act in the course of change for the benefit of their health, it is necessary, as recommended by Mafalda Eiró-Gomes and Sónia Lourenço (2009), that they are no longer seen as passive receivers but as active agents. For this to happen, the authors consider that “populations have to be convinced that they can make a difference and create this necessary change for themselves” (Eiró-Gomes & Lourenço, 2009, p. 1491).

This advice may be helpful even when a vaccine against covid-19 is now available, as maintaining protective behaviors, such as wearing a mask, remains crucial to limiting the spread of the new coronavirus. According to Noar and Austin (2020), to effectively promote these behaviors, we need to communicate what to do and why and do this clearly, consistently, and repeatedly.

The same view is shared by White et al. (2021) regarding measures against the spread of the new coronavirus: “people need to feel part of a joint effort with scientists and health authorities” (p. 219). Furthermore, people should be “confident in their ability to overcome barriers to continue this behavior” (Finset et al., 2020, p. 874), as is the case, for example, with financial difficulties in purchasing personal protective equipment.

White et al. (2021) conclude that the lessons from a year of the covid-19 pandemic point to the urgency of actively engaging individuals, patients, and patient organizations throughout the communication process, including defining key messages, checking their understanding, and using clear communication and appropriate language. For the authors, the existing evidence “shows that improving the level of patient empowerment

and patient involvement in healthcare is a protective factor in covid-19 emergence” (White et al., 2021, p. 220).

For this paper, we consider that primary healthcare is appropriate for investment in initiatives to empower NHS users, including transmitting helpful information to prevent the new coronavirus.

As part of the reform of primary healthcare, in 2008, the government created the health center clusters, public services with administrative autonomy, comprised of five types of functional units: family health units; personalized healthcare units; community care units; public health unit, and shared care resource unit (Decreto-Lei n.º 28/2008, 2008). In the same year, the government recognized, in Decree-Law No. 253/2012 (Decreto-Lei n.º 253/2012, 2012), that the emergence of ACeS:

has created a new paradigm in the organization of primary healthcare provision. Structured into flexible, functional units, the ACeS favor the access of citizens to this care, the involvement of professionals, the improvement of the quality of care, and the achievement of greater health gains. (p. 6757)

According to a group of experts, improving empowerment was considered 2 decades ago as a priority for the 21st century in the Jakarta Declaration and was defined as one of the seven fundamental principles that should guide health promotion initiatives (Rootman et al., 2001, pp. 4–5).

3. RESEARCH DESIGN

3.1. PROCEDURES FOR DATA COLLECTION AND ANALYSIS

This study was aimed at people aged 18 years or older, residents in Portugal, users of the health center clusters (family health unit, personalized health care unit, community care unit, public health unit), with internet access and Facebook social network account.

Data were collected using a questionnaire survey composed of 21 questions, applied using the Google Forms application. The questionnaire was divided into two parts: the first part was addressed to users of the health care center, and the second part was only addressed to participants who received information about covid-19 from their health care center cluster or their functional units¹.

The questionnaire was disseminated through a Facebook post by the researchers and shared in several groups (including Mulheres à Obra [Women at Work; <https://www.facebook.com/groups/mulheresaobra>], which has more than 130,000 members).

Overall, 1,010 responses to the questionnaire were obtained between December 6, 2020, and January 11, 2021. The sample excluded 106 responses from participants who

¹ This data collection instrument was used for study, conducted between June 3 and July 3, 2020, to a sample of 1017 participants (Garcia & Eiró-Gomes, 2020a).

ticked the option “no” being users of the health center, equivalent to 10% of the total responses collected (Figure 1).

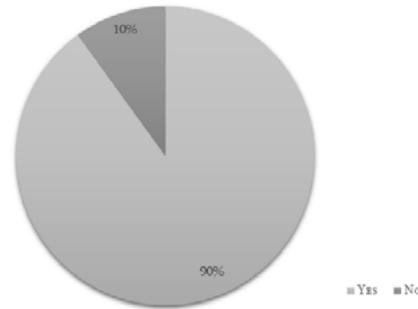


Figure 1 Are you a user of the health center? (n = 1.010)

The final sample was made up of 818 women (90.5%) and 86 men (9.5%), residents in the 18 districts of Portugal (in a total of 904 participants). Lisbon (41%), Porto (14%), Leiria (12%), Setúbal (8%), Santarém (6%), Coimbra (4%) are the districts with the highest number of participants. As for the age, more than half the sample comprises people between 29 and 50 years old (equivalent to 64.5%). The remaining age groups are represented by people between 51 and 60 years old (19.7%), between 18 and 28 years old (8.1%), and over 72 years old (0.1%), as shown in Figure 2.

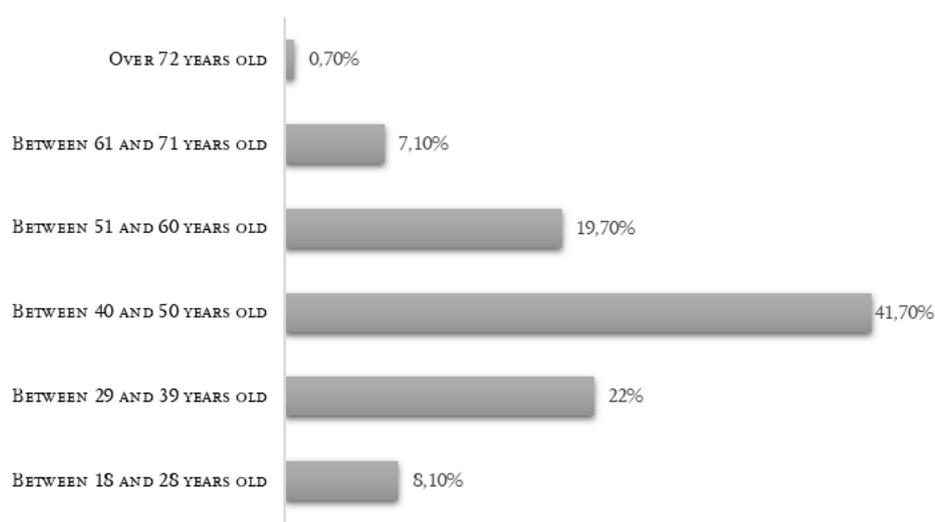


Figure 2 Age of the sample participants (n = 904)

Regarding the data on the professional situation, 64.3% of the participants in the sample are employed; 18.1% are self-employed; 8.8% are unemployed; 4.9% are retired, and 3.9% marked the option “other”.

Concerning the level of education, most of the respondents have a degree (36.2%), secondary education (19.5%), a master's degree (16.7%), a post-graduate degree (11.5%), or a technical-vocational course (7%). The percentage of people in the sample with basic education is low (0.4% with the first cycle; 0.6% with the second cycle, and 5.3% with the third cycle, which ends in the 9th grade).

In order to analyze the data, tables, charts, and graphs were prepared based on simple statistical operations, using Microsoft Excel software. Several variables were also crossed to obtain relevant data that could be discussed.

3.2. PRESENTATION AND DISCUSSION OF RESULTS

In 2020, more than half of the participants in this study ($n = 904$) very often sought information about the new coronavirus in the online media, either on institutional websites (350 responses) or in the online press (254 responses) or social media (169 responses). These results are in line with several published studies (Beck et al., 2014; Garcia & Eiró-Gomes, 2020a; Higgins et al., 2011) that report the online media as a relevant source of information on the topic of health.

These data do not surprise us since, in global terms, the most recent statistics point to 59.5% of internet users, equivalent to more than 4,000,000,000 people, which represents a growth of 7.3% from January 2020 to January 2021 (We Are Social & Hootsuite, 2021).

The *Digital 2021: Portugal* report also indicates that, on average, a person is connected to the internet for approximately 6 hours and 54 minutes (We Are Social & Hootsuite, 2021). In Portugal, it is estimated that 84.2% of the population uses the internet, approximately 7 hours and 20 minutes per day (We Are Social & Hootsuite, 2021).

The growth of online users may also positively impact the demand for content through television, which, according to our data, is the third information source with the highest demand (243 participants). Approximately 58.4% of the population in our country accesses television content online (We Are Social & Hootsuite, 2021).

In addition to television, NHS users claim to have sought information about covid-19 very frequently in the online press (254 responses), in the written press (139 responses), and on the radio (97 responses), as shown in Table 1.

	Very often	Often	Sometimes	Rarely	Never
INSTITUTIONAL WEBSITES	350	256	145	93	60
FRIENDS & FAMILY	112	232	251	200	109
SOCIAL MEDIA	169	221	188	200	126
RADIO	97	206	174	206	221
TELEVISION	243	284	180	132	65
ONLINE PRESS	254	255	202	120	73

PRINTED PRESS	139	213	203	176	173
HEALTH CENTRE CLUSTERS	17	42	99	193	553
DOCTORS AND OTHER HEALTH PROFESSIONALS	57	100	168	191	388

Table 1 Since the start of the covid-19 pandemic, where have you looked for information about this virus? ($n = 904$)

The health center clusters (and their functional units) are, among all the information sources presented, the least sought after by users of the national health service. More than half of the participants stated that they had never sought information from these institutions responsible for primary health care (553 answers). Doctors and other health professionals come immediately after as the least sought after by the participants in this study to obtain information on covid-19.

In comparative terms, there are no significant differences in the demand for information on the new coronavirus in the second half of 2020 compared with the results obtained in a study carried out in the first half of 2020 (Garcia & Eiró-Gomes, 2020a).

This survey also indicated that most participants did not receive information about the covid-19 pandemic from their health center clusters (80%). However, the overwhelming majority of participants who did not receive information ($n = 727$) stated that they would have liked to have been contacted by the health center, preferably by email (87.2%), telephone/mobile phone (36.5%), or post (20.2%). A low percentage of participants (8.7%) stated that they would have liked to have received information on the pandemic in person at the health center.

The second part of the study exclusively addressed NHS users who received information from their health center about the covid-19 pandemic, totaling a sample of 177 responses (20%). The participants say they received information by telephone/mobile phone (53.1%) in person at the health center (36.2%), by email (22%), or by post (1.1%).

Part of the sample (8.5%) chose the option “other”, referring to the social media of their health center. That suggests that NHS users accept social media as a way for their health center to communicate with them. Therefore, it seems to point to a need for reflection, by the institutions responsible for primary health care, regarding their presence in this communication channel, as already demonstrated in previous studies (Brito & Garcia, 2020; Garcia & Eiró-Gomes, 2020c).

This study evidences that most participants consider the information received by their health center as very useful (84.7%) and very reliable (70.6%). Only 15.3% of the participants classified the information received as not very useful and 2.8% as unreliable. These results suggest that NHS users consider the ACeS and its functional units reliable sources of information.

The Portuguese who make up the sample under study say, at the time of the survey, that they are very concerned (49.2%) or worried (42.4%) about the possibility of being

infected with the new coronavirus. Only 7.9% of participants say they are not worried about this disease. In a study conducted in the first half of 2020, only 33.6% of respondents expressed themselves as very concerned (Garcia & Eiró-Gomes, 2020a).

In February 2021, 748,858 confirmed cases of covid-19 were registered in Portugal (161,442,000 active and 573,934 recovered; Direção-Geral da Saúde, 2021). This virus has victimised, to that date, 13,482 people (Direção-Geral da Saúde, 2021).

The overwhelming majority of respondents chose the use of the face mask as the primary way to prevent covid-19 (97.2%), soon followed by social distancing (94.9%), hand hygiene (94.4%), and respiratory etiquette (70.6%), as shown in Table 2. The participants who selected the option “other” indicated confinement was a measure to prevent this disease. These results show that NHS users are aware of the recommendations disclosed to prevent the infection by the new coronavirus.

	Frequency	Percentage
USE OF THE FACE MASK	172	97.2
HAND HYGIENE	167	94.4
SOCIAL DISTANCING	168	94.9
RESPIRATORY ETIQUETTE	125	70.6
OTHER	23	13.0

Table 2 In your opinion, how can you prevent covid-19? (n = 177)

4. CONCLUDING REMARKS

This article aimed to analyze how the health center clusters, institutions responsible for primary health care, communicated about the covid-19 pandemic from the perspective of national health service users. The users of the national health service living in the 18 districts of Portugal were our data source.

Our research confirms that the institutions responsible for primary healthcare in Portugal were the source of information the least sought-after by users to learn about covid-19. The participants in this study also revealed they had not received any information about the new coronavirus from the health center clusters (80%), although they wished to have been contacted, preferably by email (87.2%), telephone/mobile (36.5%) or mail (20.2%).

Recommendations from numerous authors suggest that “governments should reach out to key communities to ensure that their concerns and information needs are understood, tailoring advice and messages to address the audiences they represent” (Tangcharoensathien et al., 2020, Abstract section). However, our data suggest that such work has not been carried out globally in primary healthcare.

The participants who received information on the new coronavirus from their health center considered it very useful (84.7%) and very reliable (70.6%), which indicates that the ACeS are considered a reliable source of information by the NHS users.

However, in line with previous studies (Garcia & Eiró-Gomes, 2020b, 2020c), we believe that the communication developed by the health center clusters in Portugal is far from a strategic perspective that can contribute to reducing the risk behaviors related to the pandemic of covid-19:

this public emergency has thus reinforced the need to rethink the importance of institutional sources that can ensure the transmission of credible information. In this context, due to their proximity to the population, we argue in this article that primary health care, represented by the Health Center Clusters and their Functional Units, should fulfill their organizational mission to promote health prevent disease. (Garcia & Eiró-Gomes, 2020a, p. 43)

Our data also indicate that participants are very concerned about the possibility of infection by the new coronavirus, despite knowing the necessary measures to prevent infection, such as the use of face mask (97.2%), social distancing (94.9%), hand hygiene (94.4%) and respiratory etiquette (70.6%).

The analysis of why users do not seek information from their health center and why the health center clusters did not assume an active role in communicating with their audiences in the face of the covid-19 pandemic will be future research topics.

Translation: Andreia Garcia and Mafalda Eiró-Gomes

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VARIA | VARIA 

CLASSICAL RHETORIC AND STORYTELLING IN ADVERTISING PRAXIS

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ABSTRACT

Based on the observation that storytelling has acquired a new centrality in the advertising strategies, which success can be explained by the growing importance on the brand communication in prejudice of the product's unidirectional advertisement (Baynast & Lendrevie, 2014; Baynast et al., 2018; Kotler & Keller, 2015; Rossiter et al. 2018); by the effect of the technological evolution, which allowed that the advertisement videos stop having the television exclusivity and started to be available in internet video channels, such as YouTube (Cardoso et al., 2017; Laurence, 2018; Zamudio, 2016); and for living in a hedonic society, which privileges the emotions and sensory gratifications, and, simultaneous, elect the ordinary citizen as leading figure (Escalada, 2016; Laurence, 2018; Rossiter et al., 2018); this text pretends to point the communicational wealth of storytelling in advertising, that has in the classical rhetoric some of the scientific bias on which it is based, can be established via: (a) the history verisimilitude, that comes for being sustained in the quotidian narrative, with content of "human value" and with resource to real "people" (Ballester & Sabiote, 2016; Escalada, 2016; Laurence, 2018; Panarese & Villegas, 2018); (b) evidence of the pathos, which comes mainly from the emotions that the history generates in the audience (Ballester & Sabiote, 2016; Laurence, 2018; Panarese & Villegas, 2018; Salmon, 2016); (c) the relevance of the ethos, which comes from the reliability of the author/credibility of the brand (Laurence, 2018; Panarese & Villegas, 2018).

KEYWORDS

communication, advertising, rhetoric, storytelling

RETÓRICA CLÁSSICA E *STORYTELLING* NA PRÁXIS PUBLICITÁRIA

RESUMO

Partindo da constatação de que o *storytelling* adquiriu uma nova centralidade nas estratégias publicitárias, cujo sucesso pode ser explicado pela crescente importância da comunicação de marca em detrimento da publicidade unidirecional do produto (Baynast & Lendrevie, 2014; Baynast et al., 2018; Kotler & Keller, 2015; Rossiter et al., 2018); pelo efeito da evolução tecnológica que permitiu que os vídeos publicitários deixassem a exclusividade da televisão e passassem a estar disponíveis nos canais de vídeo da internet, como o YouTube (Cardoso et al., 2017; Laurence, 2018; Zamudio, 2016); e por vivermos numa sociedade hedónica que privilegia as emoções e as gratificações sensoriais e que, simultaneamente, elege o cidadão comum como protagonista (Escalada, 2016; Laurence, 2018; Rossiter et al. 2018), este texto pretende evidenciar que a riqueza comunicacional do *storytelling* em publicidade tem na retórica clássica alguns dos vieses científicos em que assenta, nomeadamente: (a) na verossimilhança da história, que surge por estar sustentada numa narrativa do quotidiano, com conteúdos de "valor humano" e com o recurso a "pessoas" reais (Ballester & Sabiote, 2016; Escalada, 2016; Laurence, 2018; Panarese & Villegas,

2018); (b) na evidência do *pathos*, que advém, principalmente das emoções que a história gera nas audiências (Ballester & Sabiote, 2016; Laurence, 2018; Panarese & Villegas, 2018; Salmon, 2016); (c) na relevância do *ethos*, que surge da confiabilidade do autor/credibilidade da marca (Laurence, 2018; Panarese & Villegas, 2018).

PALAVRAS-CHAVE

comunicação, publicidade, retórica, *storytelling*

1. ADVERTISING AND SOCIETY

A powerful weapon of the industrial production system, advertising has long since ceased to be a simple commercial instrument for publicising products. The advertising communication system is a deep and complex generator of norms, values, lifestyles, and social behaviours that shape public life and human sociability. (Oliveira, 2004, p. 9)

This statement by Paquete de Oliveira remains perfectly current. It states that advertising is no longer a simple technique for mediating communication between supply and demand, having instead become a powerful and influential instrument of persuasion. Its performance has, for one, exceeded the founding nature of its mission — a particular type of discourse aimed at launching and promoting products and services that, within the boundaries of defined legal constraints, pops up in media — and now embodies an economic and commercial function. As a crucial pillar in brand building, advertising has asserted itself in creating innovation, developing new products and services, and fostering competition. At the same time, it has played a founding role in the development and sustainability of media and its market.

The persuasive power and ubiquity achieved by advertising have earned it something akin to an ideological charge; by portraying social and cultural concrete situations, advertising indirectly imposes upon its receivers discourse and signification structures that, in turn, reproduce and amplify themselves due to its persuasive power and mass dissemination (Caro, 2017; Lipovetsky, 2006/2007; Veríssimo, 2008). Fidalgo claims that (2010): “in the same way that propaganda became a powerful warfare tool in the first half of the 20th century, so have the industries of persuasion, particularly advertising, become key vectors of economic, social, cultural and political activity” (p. 22).

Despite such alleged power, advertising is undergoing some changes and facing enormous challenges, partially fuelled by ongoing transformations in its model, functions and breadth. The current situation harks back to the 1990s and brings to mind “The Death of Advertising”, a paper by Roland Rust and Richard Oliver, published in 1994, in the *Journal of Advertising*. The authors anticipated that the advent of the technologies of that time would bring about the swift destruction of the advertising sector.

However, the advertising market did not collapse; by virtue of its natural flexibility (a trait shared by market and professionals alike), it keeps adapting. The advertising history testifies the advertising market's ability to adapt to technological, social, and cultural changes constantly. Moreover, it shows us that, at every mutation, advertising has always kept its purpose of working on behalf of brands, advertisers, media and consumers (Baynast & Lendrevie, 2014; Caro, 2017; Dahlen & Rosengren, 2016; Rossiter et al., 2018).

The internet and digital media have set a new order in the organisation and dissemination of content when it comes to technological changes. Web technology, 3D, animation, and digital graphics, as well as digital marketing itself, have afforded the development of new and coexisting formats of online advertising that open the door to multiple strategic opportunities (Auladell, 2015). Those formats range from traditional banners to pop-up windows and video ads. Videos ads have, in fact, left the exclusivity of television to start being produced for internet video channels (e.g., YouTube).

Video ads, which can also be accessed via smartphone, now play a crucial role in advertising, not only under their highly creative content but also because they can be shared among consumers, most notably through social media (Dahlen & Rosengren, 2016). In "If Advertising Won't Die, What Will It Be?", Micael Dahlen and Sara Rosengren (2016), professors at the University of Stockholm, note, in addition, that "consumers now control not only whether to receive but also whether to actively seek out and partake in advertising" (Dahlen & Rosengren 2016, p. 336). Since the emergence of social media, we have been watching a change in the relationships among consumers, advertising and advertisers: we have shifted from a unidirectional vision to a multidirectional vision, one of interaction and dialogue, between consumers and advertisers, where the latter are relying more and more on the suggestions of the former (Dahlen & Rosengren 2016, p. 336), even inviting them to be co-creators of several aspects of advertising production and to take part in it (Lawrence et al., 2013).

It was the era of "advertising as entertainment" — a concept suggested at the turn of the last century by Jesus Requena and Amaya Zárate (1999), who proposed advertising design where the ad itself and its whole setting be converted into a consumer object. Spurred on by sharing video ads on social media — and the resulting viral effect — that notion is nowadays a reality.

We are witnessing changes in society and the behaviour of the individual/consumer. Lipovetsky (2007, p. 41) had called our attention to our living in an era of "emotional consumption", which translates into a new relation with products and sets the primacy of sensations and emotions¹, where each individual engages in the free expression of their pleasures and personal tastes (2007, p. 41). In his *Crise no Castelo da Cultura. Das*

¹ Igartua Perosanz (2007) clarifies the confusion between "mood" and emotion that is often present in the literature on media effects. He defines the former as a general positive or negative feeling, of moderate intensity, that bears no relation to a concrete social object —that is not caused by a particular event. An emotion is, in contrast, a response of a more intense and complex kind, and it relates to a particular object. Emotions are manifest through expressions, behaviours, and physiological reactions — a characterisation in line with Damásio (2000). An emotion can disrupt or redirect behaviours or cognitive processes. An example of emotion given by Igartua Perosanz is the fear brought about in the viewer by a film scene where a character is in a dangerous situation.

Estrelas Para os Ecrãs (Crisis in the Castle of Culture. From Stars to Screens), Moisés de Lemos Martins (2011, p. 189) follows the same line of thought, taking us on reflection on the human condition in a technological society where fears, risks and threats rule (Martins, 2011, p. 189). Martins tells us of a technological society that “has a dominant *pathos*, where sensations, emotions and passions deactivate the centrality of *logos* and *ethos*” (Martins, 2011, p. 189), and conveys to us the notion of a society dominated by individualism allied to hedonism. We have dropped the “Aristotelian idea of harmony” to become a *pathos*-dominated society, characterised by the supremacy of sensations, emotions and passions (Martins, 2011, pp. 188–190).

We live, in fact, in an individual-centred society, where media content that satisfies hedonistic needs coexists with media content in which the ordinary citizen is the protagonist. The successful *Big Brother*, and other shows like ilk, springs to mind as an example of content where the ordinary citizen is featured in the leading role. As an element of the media system and as a sociological amplifier that portrays a culture (Caro, 2017; D. A. Garcia et al., 2013, Veríssimo 2008), the advertising industry is currently reflecting those contents.

When it comes to video advertising (first on television, and increasingly on internet video channels), creatives have been experimenting with developing content that conveys “relevant relationships, or relationships that enable strong connections with their audiences” (Escalada, 2016, p. 48); storytelling should be highlighted as an example of such content². Storytelling is an advertising communication technique that has acquired a new centrality in advertising strategies (D’Amato & Panarese, 2016, as cited in Panarese & Villegas, 2018, p. 65). That is because it involves staging representations of real-life contexts, experiences, everyday life situations, and even complex social issues where the line between reality and traditional advertising content is blurred. Its emotional content, with “human value” and use of real “people”, imparts higher realism and veracity to the ad and induce closer proximity to its audience³ (Escalas, 2004).

Among the various actions that make up a brand’s transmedia strategy⁴, storytelling is currently an advertising communication approach that can create an attractive “experience”, consistent with people’s life experiences and sentiments and in tune with their inclinations. This technique can alleviate spectators’ tensions and provide a path to

² This much is corroborated by Catarina Duff Burnay’s and Nelson Ribeiro’s study *As Novas Dinâmicas do Consumo Audiovisual em Portugal* (New Dynamics of Audiovisual Consumption in Portugal), commissioned by the Entidade Reguladora para a Comunicação Social in 2016. Their study has found that, “although advertising investment on digital platforms has increased, TV remains the market leader in advertising and, in this medium, classical ads are relying more and more on *storytelling* to promote engagement” (Entidade Reguladora para a Comunicação Social, 2016, p. 11).

³ This is how creatives counter “discourse redundancy” — the use of everyday, trivial settings, utterly devoid of differentiating appeal — that leads to diminished attention. This is how they avoid triggering the feeling of intrusion — and consequent zapping response — when designing ads for television. In the current context of digital information overload, it also gives consumers a reason for not activating adblock technologies on video channels like YouTube, where many of those contents are made available (Cardoso et al., 2017).

⁴ Many of these ads are 20- to 30-second commercial spots produced for television. Other videos, usually with a lengthier and more explanatory narrative, are simultaneously launched on internet video channels (e.g., YouTube), where they are strategically displayed immediately before the content the viewer intends to watch. Other times content is also produced in alternative, complementary, formats that are strategically scattered throughout several media. Their visualisation conveys a unified and coordinated vision of the message (Jenkins, 2004/2009), contributing to optimise the consumer’s experience.

their action or behaviour (Pallera, 2012, as cited in Panarese & Villegas, 2018, p. 65). In fact, the premise that individuals are better able to recall information when that information is presented to them as a “story” than when it is presented to them as a list of facts is contributing more and more to an increase in the use of this kind of narrative by creatives (Zubiel-Kasprowicz, 2016).

Ching Chang (2012), professor of advertising at the University of Taipei⁵, sums up in three points the reasons that, in her opinion, explain the success of narratives (storytelling) in advertising:

- In parallel to promoting products and services, storytelling communicates experiences to consumers at the same time that it conveys more effectively the meaning and symbolic character of the brand (e.g., feeling safe and cherished).
- Storytelling heightens consumers’ involvement and entertainment. In addition, consumers express a more favourable attitude towards this kind of ad and show better recall of the message.
- Storytelling encourages consumers to infer experiences from the characters’ behaviour. Moreover, narratives about a product work as “generic scripts” (Escalas, 1998, p. 283) that define paths for future consumption, that is, they work as a reference for future consumption experiences.

2. RHETORIC AND ADVERTISING

Assuming that the different but complementary approaches can explain the success of storytelling in advertising we have just mentioned, we will now look at a video ad — *Dove Real Beauty Sketches* (Dove US, 2013), launched by the Dove brand⁶. We will endeavour to show that the persuasive power of storytelling lies in the verisimilitude of the story, that is, in how close that story is to everyday life and in the “realism” of the narrative (Bal et al., 2011; Tomás et al., 2018; van Laer et al., 2013). Verisimilitude bolsters the brand’s credibility (*ethos*) and generates a strong emotional relationship with the public (*pathos*), which makes storytelling a powerful tool for brands (Ballester & Sabiote, 2016; Laurence, 2018; Salmon, 2016). We will also highlight similarities to the aspects that make up the concept of *narratio*, as put forward in *Retórica a Herénio* (Rhetoric to Herenio; *Retórica a Herénio*, 1998/2005, Book 1.12-17)⁷.

⁵ Chang’s findings are in line with some of the results published in Nielsen’s 2015 *Global Trust in Advertising* report. The Nielsen survey found that the television spot is the advertising format that generates higher trustworthiness (63%). Advertising content that shows plausible situations associated with everyday life are, in turn, already the kind of discourse that appeals most to consumers in developing markets. Humour resonates more strongly in developed markets (51%), particularly in Europe, followed by real-life situations content (41%).

⁶ This video was part of the communication campaign “Real Beauty”, published on YouTube in 2012. It achieved remarkable success; it was, at that time, the most-watched and most-shared video ad ever on that internet video channel, with over 164,000,000 visualisations during the first month of its launch. This testifies to the public’s appetite for this new kind of advertising, and corroborates what we have said regarding sharing these videos on social media. This advertising campaign won the Grand Prix at the 2013 Cannes Festival, and the creative duo responsible for the ad were the Brazilian art director Diego Machado and the Portuguese copywriter Hugo Veiga (Santos, 2020).

⁷ Note that advertising, and *storytelling* in advertising, are instances of the shortest form of *narratio* – *percursio* (Fernández, 2006, pp. 192–193). The information to convey should be rendered as quickly as possible; there is no time for enumeration, only for what it really matters. It is upon “what really matters” that the consumer’s attention will fall, and it is within it that one is to include arguments of informational nature (e.g., showing that the product solves or prevents a problem) or of transformational nature (those that focus on sensory and emotional gratification, or on social relations). These arguments become apparent when the product’s attributes are promoted, when the social relations among the actors evolve, or when the setting where desires are satisfied is evidenced (Rossiter et al., 2018).

Our analysis draws from the “coincidence” between persuasive and argumentative resources present in advertising praxis and rhetoric. Frequently, there is no clear intention on the creatives’ part to use the rules of rhetoric; often, they are not even conversant with rhetoric doctrine. That said, the coincidences are there (Durand, 1970; Fernández, 2006; Rey, 2009). In fact, they may even occur inadvertently. If we go back to the beginnings of advertising, one of the first explanatory models of the message designing process was the elementary AIDA (attention, interest, desire, action), attributed to Elias St. Elmo Lewis and first published in 1925, in “Theories of Selling”, by E. K. Strong (as cited in Martín, 1996). It recommended that an ad should, in this order, call people’s attention (the moment where we should give the public information about the existence of the product or service) and pick their interest, that is, share a piece of relevant information about the properties, specifications and/or benefits of that product or service. To meet this twofold goal, advertising should use arguments that can elicit desire in the consumer and trigger the action/purchase. Now, this model merely reproduces the functions of *docere*, *delectare* and *movere* espoused by Latin rhetoricians (Cicero among them), according to which rhetoric should teach (*docere*) through logical arguments; delight, and capture the listener’s attention (*delectare*); and serve the *movere* component, that is, persuade an audience through emotions and sentiment, to move it to action (Fernández, 2006).

The video ad *Dove Real Beauty Sketches*, chosen to illustrate the current paper, depicts a group of women who are asked to describe their most salient facial features and some of their personality traits; all in all, a self-perceptive analysis. While each woman is describing herself, Gil Zamora, a former FBI forensic artist, is listening and sketching the features she reports – a process identical to that of obtaining a “facial composite” (a.k.a. “identikit”) of a perpetrator of a crime based on eyewitnesses’ accounts – without ever establishing visual contact with the woman he is sketching. That ensured that the portraits were made solely based on descriptions, with no visual interference at all. Later, the same artist sketches those same women but based on other people’s accounts. These drawings were made on different days so that the artist would not know which woman he was sketching. The differences between how the women described themselves and what other people saw in them were striking, showing that female self-perception is much more negative than the opinion/visual impression others described. This finding is corroborated by the results of several scientific studies carried out on this theme” (Brennan et al., 2010; McCabe & Monteath, 1997; Secchi et al., 2009).

We will begin by examining the arrangement (*dispositio*) of the elements of discourse⁸ as presented in the work of Aristotle (1998/2005, p. 277), also taking into account Barthes’ (1987) insights on this subject. The elements of discourse there stated are *exordium* (or proem), *narratio* (narration, statement of facts/events), *confirmatio*

⁸ Our examination takes for granted that the creative who has developed and organised the message assumed the audience was familiar with the structure and fictional content of the advertising narrative. The creative must have likewise anticipated that the audience had some acquaintance with the brand and its values, and that they would interpret that content as persuasion-oriented — not as, say, journalistic content.

(confirmation or proof), and *epilogue* (peroration)⁹. In the remainder of this paper, however, we will follow the three-part paradigmatic structure of *dispositio* put forward by Fonturbel (2009, p. 139) because the specific nature of advertising discourse creates a spatial (and also temporal, in the case of video ads) structuring with its own idiosyncrasies. The advertising discourse is essentially short and, as such, *narratio* (the statement of the topic and the orator's/brand's stance) and *argumentatio* (the reasons that support the *narratio*) are merged into one. In this tripartite structure, we find:

- the initial segment (*exordium*), consisting of musical background and introduction of the forensic artist. The goal is to get the audience's attention and interest;
- a middle segment, which condenses the *narratio*. Keeping in mind how this concept is defined in *Retórica a Herénio* (1998/2005, Book 1.12-17), we can see that the concern falls onto:
 - the brevity of the narration — this advertising campaign focuses solely on what is essential;
 - the clarity of the narration — the content is unambiguous and evident, containing but relevant and essential information to its target, rendering the message easy to understand; the narrative follows the chronological sequence of events — there is a plotline, and that plotline follows a sequence — to preclude confusion in the presentation, odd content, or reference to extraneous issues;
- the use of verisimilitude, proximity to everyday life and realism¹⁰. The unknown author of *Retórica a Herénio* (1998/2005, p. 67) tells us that the narrative will be plausible if it is suitable for:
 - the “context”¹¹ — well, this campaign was launched at a time and space that fit the trend of a society marked by body appropriation and by the cult of appearance and appearance management (Dittmar, 2008; Feiss, 2012; M. Garcia & Cormelles, 2007; Laurence, 2018);
 - the length of time – the ad has the duration deemed necessary for getting the message across (considering its content and format);
 - people's standing — the situations described intend to show the feelings, emotions and concerns of the ad's target public;
 - the reason behind the decisions — the campaign aims at “portraying” circumstances simulating the real life of each of the members of the public to whom it is addressed;
 - the opportunities provided by the scene of action — the narration style is plausible in light of the topic and the characters. Deep down, the actions and facts are in line with the opinion and feelings of most people, which contributes to the brand's credibility (Bal et al., 2011; Ballester & Sabiote, 2016; Laurence, 2018). In other words, the discourse is all the more believable, the greater the realism of the topic, characters and set featured.
- lastly, by way of conclusion, the *epilogue*: the video ad appeals to the audience/public: “you are more beautiful than you think”, which sums up the content of the discourse in a pleasant and concise sentence.

⁹ Aristotle himself states that “a speech has two parts. It is necessary to state the subject, and then to prove it” (Aristotle, II.1414a38-40). In his “Preface and Introduction” to the 2005 Portuguese edition of Aristotle's *Rethoric*, Júnior confirms: “the two truly essential parts of speech are narration and proof” (Aristóteles, 1998/2005, p. 49). The unknown author of *Retórica a Herénio* (2005, Book 1.4), on the other hand, states that speech is composed of six parts: exordium, narration, division, confirmation, refutation and conclusion/peroration.

¹⁰ Note that the concept of verisimilitude is not only linked to that of “reality”, but also to the universal narrative concepts of action, characters, space, time, and form – which is to say, the circumstances that surround the event (Fernández, 2006).

¹¹ The author states that *narratio* “will have plausibility if it answers the requirements of the usual, the expected, and the natural” (*Retórica a Herénio*, 1998/2005, Book 1.16). Considering the definition given, we have rendered this notion as “context”.

The author of *Retórica a Herénio* (1998/2005, pp. 65–70) deepens the analysis of the particular aspects of *narratio* that we have just mentioned, stating that there are three types of narration:

- the first type, where one states the events (harnessing every detail to one's own advantage, here including one's own cause and the basis or grounds for the controversy);
- the second type, where the purpose is levelling an accusation (and establishing a comparison with the topic under discussion and consistently entertaining the audience);
- the third type, not used when dealing with civil causes (nevertheless useful as practice for public speaking and writing), is used when the intention is to please the audience.

This last type of *narratio* is, according to the author, divided into two classes:

- the first one directs our attention towards the *actions* and is, in turn, further divided into:
 - *fabulam* (legendary), where actions are narrated that are neither true nor plausible;
 - *historiam* (historical), an account of actions that did occur, but in the remote past;
 - *argumentum* (realistic), where the actions told are false, albeit plausible;
- the second one focuses on the *people/characters*. According to the author, this class of *narratio* should present “a lively style and diverse traits of character, such as austerity and gentleness, hope and fear, distrust and desire, hypocrisy and compassion, and the vicissitudes of life, such as reversal of fortune, unexpected disaster, sudden joy, and a happy outcome.” (*Retórica a Herénio*, 1998/2005, p. 65).

We can thus say that the power of the Dove campaign lies, precisely, in the story's verisimilitude and in the fact that it focuses on the characters. It is a story that addresses issues that affect the public's everyday life. Its characters display relatable physical attributes and express fears, anguishes, suspicions or desires shared by the target public of the message.

At the same time, the narrative departs from traditional advertising canons that communicate notions of youth, wealth or lavishness — “made up” topics, in short, closer to those that characterise cinematic fiction and are somewhat akin to the notion of *argumentum*, as defined in *Retórica a Herénio*. Likewise, it departs from the typical discourse about the fantastic (fantasy) and the unreal, which share some traits with the *fabulam* type mentioned in that text.

In the campaign in question, the message does not stem from an ideal imaginary, as is the case in most traditional advertising, but from the public's actual values and concerns; it shows real life through arguments that “move” that same public and narrates the feelings and emotions experienced by the characters, which are shared by the public to whom the message is addressed. That shows a “human” facet of advertising, thus contributing to its credibility.

Designing this narrative required plenty of preliminary work (*inventio*) in which the sender “attempted to find out and design the most suitable arguments for the thesis they intended to advocate for” (Nunes, 2015, p. 10). In other words, there was a stage in the process where ideas were assessed, and arguments were chosen in light of the intended marketing goals and the target public, with a particular emphasis on which characters to choose.

Another crucial element of the persuasive process in advertising is the impact that certain characters have on audiences. What is their persuasion role? Throughout the history of advertising, no one has ever disputed that a lot of care and thought goes into character definition. In an advertising plotline, characters work as virtual receivers, “interpreting” a “self” that is real to the target of the ad. In the methodology he developed to create brand identity, Kapferer (1994/2000) cautioned that special care should be taken when selecting the leading character for a campaign because their presence aims at “creating a reflection, an ideal image of the consumer/user to whom the ad is addressed, (...) therefore working as an aspirational model” (p. 40). The purpose of such presence is that of “convincing” the consumer that that could be his/her image, the image of his/her self that would show before others, should he/she consume the advertised product. Judith Williamson (1994) was stating the same point when she noted that advertising seemed to be drawing on the cognitive phenomenon of identity building, described by Lacan as the mirror stage (p. 60) — something that occurs when the child takes the image of the adult as a reference and embodies it. It seems to us that, in examining how audiences identify with characters — a subject which study began in the field of art and literature reception and interpretation and later extended to the cinema (Metz, 1980) — psychoanalysis has also helped advertising scholars understand this phenomenon.

There are also models in the field of psychology that help us understand this process. The elaboration likelihood model (ELM), developed by Petty and Cacioppo (1986), is one of the landmarks in explaining persuasive processes, or the narrative transportation model, developed by Melanie Greene and Timothy Brock (2000), emerged within a multi-disciplinary structure that integrates cognitive psychology and theory of communication, culture and consumption.

Juan Igartua Perosanz (2007, p. 41) says that “identification with characters” is a multi-dimensional construct comprising several psychological processes. He sees empathy as one of the essential dimensions of identification, which allows us to understand the process of entertainment content reception and explain the enjoyment derived from being exposed to that content (Igartua Perosanz, 2007, p. 13). The premise here is that through their empathy towards the story’s characters and the imagination they apply to interpret the story’s plot, receivers/consumers experience a feeling of mentally “entering” the world evoked by the narrative, of embarking on a “symbolic journey to other worlds”.

In this perspective, the process by which the consumer identifies with the characters and the narrative includes three properties:

- Firstly, it requires the receiver to process stories — the acts of receiving and interpreting.
- Secondly, spectators are transported due to two main components:
 - empathy. Receivers try and understand the character’s experience (i.e., to put themselves in the character’s shoes and know and feel the world from that point of view). That may explain the receiver’s resulting state of “detachment from the world of origin”, and it justifies the notion of “narrative transportation”;
 - mental images. Receivers conjure up vivid images of the story’s plot line, so much so that they feel as if they were experiencing those very events (Green & Brock, 2002).
- Finally, when transported, receivers lose touch with reality in the physiological sense.

In this perspective, narratives derive from a process of interpreting and attributing meaning to a story. Following in the footsteps of Igartua Perosanz (2007), van Laer et al. (2013), in their “The Extended Transportation-Imagery Model”, put forward a broader and revised understanding of the narrative transportation model, which now includes the notion of empathy. Here is, in a nutshell, why narrative transportation occurs, according to van Laer et al. (2013):

- the individual takes a liking to the story’s characters;
- the plot activates the individual’s imagination, leading them to experience “suspension” of reality while receiving the story.

The authors find that narrative transportation appears to be more of an emotional than an intentionally cognitive process and that it leads to potentially increased and long-lasting persuasive effects (van Laer et al., 2013, p. 800).

Going back to the video ad, we can say that we are before a campaign where identification between audience and narrative emerges via empathy towards the characters. In performing a role that brings them closer to the ideals of the target public, the characters “lead” the audience to process and interpret the story as if it were theirs. In other words, because they assimilate the characters’ experience as if they were the ones experiencing it, the audience is “transported”, which puts them in a (transitory) state of detachment relative to the reality they inhabit, while at the same time feeling as if they were experiencing the story’s events themselves.

So, the audience takes a liking to the story’s characters, and the plot activates the audience’s imagination, triggering the “suspension” of “their” reality while the story is being received so they can assimilate the experience that the characters have enjoyed with the advertised brand as theirs.

Let us now focus on the argument aspect. What persuasive forces were mobilised into the ad? What were the arguments used?

Aristotle (1998/2005) says that the orator “persuades through his hearers when they are roused to emotion by his speech; for the judgements we deliver are not the same when we are influenced by joy or sorrow, love or hate” (p. 97).

While it is true that, at its inception, advertising had an informational function, it is no less true that, for years now, we have been watching a trend: increasing use of symbolic arguments, aimed at triggering the public’s emotions, imaginaries, desires and ambitions (Solomon, 2018); in other words, a predominance of *pathos*.

The Dove campaign is emotional, so persuasion occurs deeper than that found in traditional advertising (Escalas, 2004). The public’s absolute adherence to the cause advocated in the ad has most likely resulted from their being exposed to an unexpected type of discourse, in which arguments focus on feelings and emotions, rather than on products’ features, increasingly indistinguishable from one another.

This campaign has caused an emotional reaction in millions of people and has inspired them to share it with others. In addition to millions of visualisations (bear in mind that the video ad was translated into 25 languages and seen in 110 countries), it was the outpouring of testimonies worldwide that singled it out. Such a level of dissemination

was only reached because the advertising narrative was based on a story consistent with the public's values (Panarese & Villegas, 2018).

The fact that the source/sender — the Dove brand — is perceived as reliable and trustworthy must indeed have played a role in that massive adherence to the ad. Paulo Serra (2015) tells us that “the credibility of the orator was readily pointed out by Aristotle as one of the main – perhaps the most important – means of persuasion” (p. 127). The reason seems obvious: a person cannot be persuaded by someone whose discourse fails to inspire a modicum of confidence. Serra (2015) adds that one element that defines *ethos* is that it “is a necessary proof, particularly when dealing with things about which there is no unequivocal knowledge and which are therefore open to debate” (p. 129). He continues, noting that “the interpretation seems evident: in those things that are uncertain or dubious, where we cannot reach a conclusion on our own, we need to trust someone to overcome the uncertainty and suspicion they arouse” (Serra, 2015, p. 129).

Serra (2015) is referring here to political issues, but what he says in that context, namely on sources of information, can certainly be extended to advertising and brand credibility. One should also note that, since Aristotle, the goal of any argument has always been that of bringing about or increasing the audience's support for the thesis. Such support will be all the more effective, the more significant the intensity it achieves, triggering in the listeners an action, or, at the very least, a willingness to act at a later opportunity.

In Dove's advertising campaign, the public's adherence to the issues and ideals depicted in the ad is abundantly clear in the fact that the video has been shared thousands of times and has generated thousands of comments. This response is the result of a campaign that set a differentiating limit, evidenced personality, and established relations with the public (Baynast & Lendrevie, 2014; Kapferer, 1994/2000; Kotler & Keller, 2015) in a cultural and social universe marked by body and self-image concerns. With this campaign, the Dove brand endeavoured to build its renown from universally recognised values and to mobilise the public around them, thus implying that it understands (a) the needs of consumers and (b) their constraints when it comes to a crucial issue in a woman's life: her self-image. The campaign's persuasion comes from choosing to focus on the fact that women underestimate themselves.

Matching discourse to the public is also one of the fundamental theses in Aristotle and all of the classical rhetoric (Serra, 2008). The practice of rhetoric entails a discourse directed to an audience, where “the orator underpins his discourse on what the audience expects of him, thus respecting their values, beliefs, cultural habits, experiences, social status or aspirations” (Mateus, 2018, p. 43). In fact, in Book II of *Retórica a Herênio* (1998/2005), Aristotle tells us of the different types of individuals who can make up an audience and of their particular attributes: the young, the elderly, the powerful, the aristocrats, those in the prime of life. They are thus psychological descriptions of different human characters.

The creatives who developed the Dove campaign will have had an accurate and up-to-date picture of the psycho-sociological profiles of their audience¹², as well as knowledge of their needs, motivations and socio-cultural habits. That enabled them to create and deliver a message that exhibits the values, the issues, and a communication register that coincides with their audience's socio-cultural norms.

4. CONCLUSION

Considering that advertising is a powerful and influential instrument of persuasion, albeit undergoing a process of change and facing significant challenges partially caused by shifts in its own model, functions and breadth, and recognising that brands show, nowadays, an appetite for establishing relations with their public through affection and emotions, this paper has attempted to show that storytelling — which may have a structural underpinning in classical rhetoric — can be one of the “tools” brands can use in pursuing that goal.

We can say that storytelling is grounded on the concepts of “story” and “arration about people” as defined in *Retórica a Herénio* (1998/2005, Book 1): it attempts to render an account of seemingly actual facts, portraying real-life situations, using characters the public can relate to, displaying feelings, worries, and emotions for purposes of eliciting an emotional response in the audience (evidence of *pathos*).

We have seen that the brand designed the campaign under analysis; was deemed credible (prominence of *ethos*); was launched in a time and space marked by a concern with and appropriation of the body, by individuals increasingly loving themselves, by appearance management and a cult of appearance; and that the actions and facts narrated were suitable to the nature of the participants, public opinion and audience's feelings.

Following in Moisés de Lemos Martins (1998)¹³ footsteps, we, too, have found that we are before a kind of advertising that refuses some of the *topoi* (common themes) usually shown in advertising. The advertising we have examined does not feature representations of happy families sharing a meal around a table, married couples having a lovely time, cars travelling along with amazing landscapes where everything is clean and beautiful. It likewise discards sentimental and romantic atmospheres, as well as ideal-like characters in the role of heroes; it does not highlight arguments such as success, a synonym for happiness, or expertise, as an apology for human behaviour — all of the hallmarks of the advertising that is put before our eyes day after day. It is, in sum, a kind

¹² In advertising, audience is equal to an entity statistically expressed by a set of individuals that, in the sender's estimation, share a set of common traits and features, such as social class, age, or occupation, as well as similar values and personality traits, activities, interests and attitudes.

¹³ According to Moisés de Lemos Martins (1998) “the persuasive force of the *topoi* lies in their reflecting a common, acknowledged and accepted wisdom; and it is because they circulate, because they are accepted by many, that they enjoys a presumption of truth and are granted authority” (p. 48). Now, this is the premise where our notion of “common themes” used in advertising lies.

of advertising that rejects some of the *topoi* of modern society, which discourse becomes a mirror of consumers in reflecting social aspirations' "dreams".

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KEY CHALLENGES AND RECOMMENDATIONS TO PROVIDE EUROPE WITH A FILM-SUBTITLING PROTOCOL IN THE DIGITAL ERA THROUGH THREE CASE STUDIES

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ABSTRACT

By analysing European cultural policies and paradigmatic case studies, this article highlights the close link between the normalisation of minority languages in Europe and film subtitling. Film subtitling is an activity that urgently needs to be protocolised insofar as it guarantees both the preservation of the cultural originality of the audiovisual work and its value as tangible and intangible European cultural heritage. To do so, we will analyse the legal divide between the all-encompassing European Union declarations and their implementation by state and local administrations, which often occur in erratic, random, contingent packages of measures that lead to a systemic absence of results. Finally, we will propose some key challenges and recommendations to provide Europe with a film subtitling protocol to promote cultural diversity and normalise non-hegemonic languages.

KEYWORDS

audiovisual policy, European Union, original version, subtitling, digital era

DESAFIOS E RECOMENDAÇÕES PARA DOTAR A EUROPA DE UM PROTOCOLO DE LEGENDAGEM DE FILMES NA ERA DIGITAL ATRAVÉS TRÊS ESTUDOS DE CASO

RESUMO

Através da análise de políticas culturais europeias e de estudos de caso paradigmáticos, este artigo destaca a ligação que existe entre o processo de normalização de línguas europeias minoritárias e a prática de legendagem de filmes: esta última é uma atividade que carece

urgentemente de ser protocolada, na medida em que garante tanto a preservação da originalidade cultural da obra como o seu valor enquanto património cultural europeu material e imaterial. Neste sentido, propomo-nos analisar o fosso que existe entre as declarações abrangentes da União Europeia e a sua implementação por administrações estatais e locais, que frequentemente ocorrem em pacotes de medidas erráticas, arbitrárias e contingentes, que conduzem, deste modo, a uma sistemática ausência de resultados. Por fim, enunciaremos alguns desafios e recomendações, para dotar a Europa de um protocolo de legendagem de filmes, de modo a promover a diversidade cultural e a normalização de línguas não-hegemónicas.

PALAVRAS-CHAVE

política audiovisual, União Europeia, versão original, legendagem, era digital

1. INTRODUCTION

The possibility of affirming the cultural heritage condition of subtitled audiovisual work in the contemporary European context should be estimated in light of the very concept of “intercultural competence” (Santiago Vigata, 2010, p. 3), both in its tangible and operational aspects:

- tangible, as it is a principal competence that the individual acquires during their language and cultural learning.
- operational, to the extent that it trains that individual to establish relationships with foreign cultures.

Following the above, it can be affirmed that, in the audiovisual field, preference for the original version (OV) of a media product, or, in its absence, for an original version with subtitles (OVS), per se constitutes a militant, propitiatory expression of intercultural communication.

The cultural potential of film subtitling lies both in its facilitating role for immersing spectators in foreign languages (Touy, 1995, p. 59) and in its function as an indicator of the vehicular nature of a language in a particular culture and its potential to include collectives with sensory disabilities, in light of the innovative contributions of Romero-Fresco (2018, pp. 199–224).

The cultural potential of subtitling goes beyond the realm of cinema to venture into other forms of electronic entertainment, such as video games. Accordingly, Jan Pedersen (2015, pp. 157–158) echoes the academic disdain that often surrounds the study of videogame translation, even though the overall gross income of the gaming industry exceeds those of the film or musical industries, constantly increasing its penetration in “first world” households. Méndez-González (2015, pp. 76–81) adds an interesting aspect to this reflection, because if the traditional audiovisual market — bowing down to dubbing dynamics and impervious to the use of subtitling — is, in turn, the source of the design and development of many productions based on graphic computing, the future of OV and OVS is not looking good.

Based on a critical analysis of community cultural policies and some representative case studies, we aim at proving the close link between the normalisation processes of minority languages in Europe and the use of audiovisual subtitling — the guarantor of the preservation of the originality of the work and its value as European cultural heritage — and the need to propose a European protocol transcending the context in pursuit of the structure. Thus, we will focus on our key challenges and recommendations to provide Europe with a protocol for subtitling films in the digital age through three case studies: the Galician, Basque and Catalan audiovisual cases.

2. THEORETICAL FRAMEWORK

The concept of “normalisation” demonstrates its complexity by involving political, sociocultural, historical, economic, geographical variables. Those are evident in a wide range of contributions. Among the most noteworthy are Lasagabaster (2017), Cormack and Hourigan (2007) and Seosamh Ó Murchú (1991). “Children learn a whole new ‘language’ from television which they bring with them into formal learning situations which they use among themselves to express feelings and emotions which comply with what are often set piece experiences portrayed on television” (Ó Murchú, 1991, pp. 89–90).

Also, the prolific Irish field of intercultural studies Eithne O’Connell (2003) later enriched the debate with her forward-looking reflections on audiovisual translation and its core character in the normalisation of non-dominant minoritised languages, especially in the age range of children and adolescents strongly determined by the omnipresence of electronic devices that promote continuous exposure to audiovisual content: “the production and translation of written and/or audiovisual material for children are central to the development of the younger generation’s language skills and is, therefore, of crucial importance to the survival of the minority language into the future” (O’Connell, 2003, p. 61).

Regarding the overlapping of subtitling in the dominant business model, the choice of the vehicular language appears as a sign of cultural identity and as a determining element of the very process of commercial film use (by conditioning subsequent choices of original viewing, subtitling or dubbing), without undermining the duty of cultural industries in terms of preserving the integrity and language originality of the film in a “sustainable exploitation environment” (Kääpa, 2018, p. 226).

It is undeniable that the income from cinema screenings in theatres is less and less relevant in the total income of film production. However, the success of a film in the cinemas continues to be an important advertising claim for its subsequent dissemination on a dense network of platforms and digital media (García Santamaría, 2015, p. 61). Moreover, on the other hand, traditional cinema continues to preserve that “liturgy” of diegetic appropriation of a story by the cinematographic spectator: a personal appropriation in which the choice of vehicular language is decisive.

It is time to refute one of the topics that tend to be used against audiovisual subtitling: its impossible relationship with diegesis. The ardent naysayers of cinema subtitling — who consider the superposition of alphanumeric characters on images to be a

disturbance in the process of immersion of the spectator in the film diegesis — do not usually attribute the same to dubbing, despite its incontestable artificiality and supplanting of performance acting. On the contrary, Méndez-González (2015, p. 88) ponders the intercultural effectiveness of subtitling as a crucial part of “targeting” — according to the term’s linguistic meaning — and the location of the audiovisual work, already in its launching in foreign markets or to encourage the accessibility of people with hearing disabilities.

The normalisation of the practice of subtitling preserves the language integrity of the film without interfering in its diegesis while guaranteeing equal access to culture, regardless of the particularities — not sensory barriers — of each person: a guarantee that it will surpass the boundaries of film to enter other environments of audiovisual consumption that, like videogames, prioritise the quality of gaming — interactivity, immersion, and so on — beyond diegesis: “having subtitles in games should not be one of those things which are added in ‘because everyone else is doing so’ or at the ‘last minute’ but instead as something which can enhance the player experience” (Griffiths, 2009, p. 4).

In any case, only in light of that symbolic consideration and the non-transferable cultural experience attributed to cinemas can European protectionism be understood through provisions such as the controversial screen quota:

as a reaction to this shift of power and fearing both the economic and cultural impact of Hollywood, many European governments introduced measures to protect their domestic film industries, mostly in the form of import and screen quotas. These measures found expression in the “Special Provisions Relating to Cinematograph Films”, which became part of GATT [General Agreement on Tariffs and Trade] 1947. (Burri, 2014, p. 480)

Pay attention to the information that, relative to 2016, is provided jointly by the European Audiovisual Observatory and the European Film Agency Research Network. According to them, although the screen share in EU countries fell slightly (from 27 % to 26.7%), the share of films produced in Europe with investments from the United States of America — an unconventional pairing that challenges the credibility of the very conception of “European cinema” — suffered a significant shrinkage (from 7.1% to 3.6%) in a context in which European box office collections remained stable (European Audiovisual Observatory, 2017). Through the analysis of the percentages applied in European cinematography, it is possible to identify the mismatch between the screen quota and the subtitle quota, thus violating the distinctive identity of the film: its choice of the original language.

On the other hand, Law No 55/2007, of December 28, on Cinema — the transposition of European legislation into the Spanish legislative framework — stipulates:

to fulfil the screen quota, the sessions in which they are screened will have double value in the calculation of the percentage foreseen in the previous section: a) EU fiction films in original version with subtitles to one of the official Spanish languages. (Ley 55/2007, 2007, Art. 18.2.)

Despite its protectionist nature, since the end of the 20th century, European legislation has shown its inability to tackle the exponential shrinkage of the classical screening model: as an example in this regard, García Santamaría (2015, p. 171) warns of how the cinema sector in Spain has collapsed, dropping from 7.761 screens in 1968 to hitting rock bottom in 1994 with only 1.773 screens.

While cinemas have experienced an increase throughout Europe, driven by the emergence of multiplex cinemas, mostly urban-based, the crisis in the sector finished off 86% of the screens located in towns of less than 10.000 inhabitants, while cities with more than 100.000 inhabitants had lost 20% of their cinemas (García Santamaría, 2015, pp. 177–178). Such a drastic shrinkage of cinemas brought an increase in the cost of tickets that came to exacerbate, in turn, the trending loss of cinemagoers.

Everything referred to up to this point should be placed, as García Santamaría (2015, pp. 351–352) reminds us, in an unprecedented context in which the experience of film consumption has been blatantly emancipated from the cinema. It is conceived exclusively for screening films towards multi-purpose spaces that — in the wake of digitalisation — diversify their sources of income by hosting activities as varied as online video games, broadcasting sports and cultural events (live or deferred), private screenings, social celebrations, and so on.

It is a new audiovisual landscape dominated by over-the-top (OTT). In fact, the emergence of OTT (such as Netflix, HBO, or Disney +) generated multiple hopes regarding the presence of non-hegemonic languages in their available catalogues. Unfortunately, far from the expected diversity of content, themes, consumer profiles, and so on, a homogenising (in)culture was imposed that entirely affects non-hegemonic languages.

A good example of this was the landing of Disney + in Spain on March 24, 2020, accompanied by the controversy and conflict with the Generalitat de Catalunya over eliminating content in the Catalan language from its catalogue. A year later, Lilja Dögg Alfreðsdóttir (Iceland's minister of education, science, and culture) has secured an explicit commitment from Bob Chapek (chief executive officer of The Walt Disney Company) to include Icelandic language content in the company's catalogue.

Despite the “small” concessions to minority languages, the report of the European Audiovisual Observatory (Jiménez-Pumares, 2020) confirmed the overwhelming dominance of U.S. platforms in the European subscription streaming market, and therefore of the English language: a market valued at €9,700,000,000 (\$11,710,000,000) in 2020.

3. METHODOLOGY

Regarding the methodological approach of our article, our starting point is an intensive documentary analysis methodology, involving a critical and exhaustive review of essays, legislation, and reports, as a result of applying controlled hermeneutics through inference — in the manner of Bardin (2013) and Krippendorff (2013).

However, the essay literature review results were confronted with a series of in-depth interviews with some 30 European experts (who will endorse the validity of the proposed

topics or propose new ones). They were summoned to two international events, held in 2019 and 2020: international forum “Languages and Cinema. Indicators for a European Subtitling Programme” and “Languages and Cinema II. For a European Subtitling Programme in Non-Hegemonic languages”.

Delphi method was chosen for the collection and tabulation of the information, through two waves of questionnaires, which considered the following expert panel, made up of 91 specialists, with an average age of 49.09 years, of which 65.9% were men and 81.3% belonged to the Spanish State and the rest were European experts. All of them are experts in European audiovisuals in general, and in subtitling policies in particular, according to the profiles shown in Table 1.

PROFILE	NUMBER	PANEL PERCENTAGE
Academic	31	34,1
Institutional	7	7,7
Professional	53	58,2
Total	91	100

Table 1 Expert panel

Regarding the justification of the chosen sociogeographic sample, it is evident that the Galician, Basque and Catalan cases have a particular interest:

1. They are three geographic areas whose languages are not shared by the rest of the state to which they belong and whose non-hegemonic languages share co-officiality with a hegemonic language.
2. At the same time, these are autonomous communities that, due to their condition, must combine three different political-administrative regimes: the European, Spanish and autonomous community regulations in question, whose practical application is usually not harmonious.

Furthermore, our starting hypothesis emerges precisely in this sense: would it be possible to extrapolate the three cases analysed, located in the Iberian Peninsula, to the complexity of the European audiovisual reality? Indeed, the three cases analysed share a transcendental problem concerning heritage and commercial aspects in the EU audiovisual policy: a redefinition of the film’s nationality.

4. ANALYSIS OF THREE CASE STUDIES

We will focus on the Galician and Catalan film industries — under the protection of the demolingistic analysis proposed by the philologists of the Real Academia Galega (<http://www.realacademiagalega.org/>) Xaquín Loredo and Henrique Monteagudo (2017) — introducing the Basque film industry as a middle ground between both models. Thus, applying the Catalan language intergenerational transmission rate (ITIC, *índice de transmisión intergeneracional del catalán* in Spanish:) — created by Torres (2009) — to the Galician and Catalan demolingistic developments in the first decade of the 21st century, Loredo and Monteagudo (2017, p. 113) note similar, although contrary, absolute values in

their ITIC: in keeping with the contributions of O'Rourke and Ramallo (2015), both philologists note language revitalisation attitudes in the Catalan population that in Galicia are lacking a significant weight in absolute terms.

Now, while taking the briefest glimpse at the film industries of two examples of European minoritised film sectors, Galician and Catalan, we can easily isolate the two main obstacles faced by the normalising potential of audiovisual subtitling:

- there is a notorious disparity between the bombastic European Union declarations and their implementation, by state and local administrations, in erratic, random and contingent packages of measures that reveal a systemic absence of results;
- a foreign market impervious to those contents not subjected to the use of dominant languages for their production and diffusion, and an internal market whose reduced demand fuels the hackneyed sales pitch of the low profitability of the product.

According to Herreras (2010, p. 11), the radio and television projects of a global nature that emerged throughout Europe during the second half of the 20th century provided an incentive to normalise the use of non-dominant European languages; however, this aspect needs to carry on improving. That is the case of Galicia, a “Stateless Nation” — according to Schlesinger’s (2000, pp. 19-20) definition — located in the northwest of the Iberian Peninsula, with a population of more than 2,700,000 inhabitants, with its own language, government and parliament, as well as its own public broadcasting service, the Corporación de Radio y Televisión de Galicia (CRTVG), supposedly a bulwark of an idiosyncratic audiovisual industry.

The CRTVG prioritises audiovisual dubbing of foreign languages and scarcely broadcasts subtitled programming, except for a weekly film in the *Butaca Especial* programme, relegated to the early slot on Saturday mornings. Already in 2012, the Group of Audiovisual Studies of the University of Santiago de Compostela had warned (Ledo-Andión & Castelló-Mayo, 2012, p. 113) of the need to enable a space on the CRTVG website (<http://www.crtvg.es/>) addressed to the Portuguese-speaking community, in order to open new lines of business and cultural integration, in which subtitling would have to become an essential tool.

In fact, that innovative proposal was echoed retrospectively — among others — in the “Protocol to Ensure Language Rights” (Hizkuntza Eskubideak Bermatzeko Protokoloa/Protocol to Ensure Language Rights, 2016), developed under the guidance of the Kontseilua (The Council of Basque Language Entities) and the Fundación Donostia del País Vasco, as well as by numerous language communities, among them Galicia. Measures have been developed — specifically in section 6 on media and new technologies — to accompany articles 35 to 40 of the Universal Declaration of Linguistic Rights, most notably, the promotion of minoritised languages in the publicly-owned media, advising, in the case of television, the use of subtitles or a second audio channel (Hizkuntza Eskubideak Bermatzeko Protokoloa/Protocol to Ensure Language Rights, 2016, p. 27): recommendations disregarded by the CRTVG, despite their economic, industrial and sociocultural relevance.

Indeed, according to García González and Veiga Díaz (2009, p. 241), subtitled programming in Galicia is usually limited to festivals and film clubs that, although on the margins of the large film industry, have become an example of citizen empowerment and successful promoters of cultural projects — and, therefore, language projects — such as Numax:

examples of restoring closed cinemas, or those doomed to close down, have multiplied thanks to the citizen movements driving cinema cooperatives. The non-profit worker cooperative that manages the Cine Numax in Santiago de Compostela has had noteworthy success and has been acknowledged by the Consellería de Traballo with the award for the best cooperative project 2015. (Heredero & Reyes, 2018, pp. 57–79)

Therefore, two significant consequences can be inferred from the abandonment of the responsibilities entrusted to the CRTVG:

- industrial responsibilities, as the diminished Galician business sector specialising in audiovisual subtitling — a sector mainly based in big cities such as Madrid and Barcelona — barely finds support in the limited demand of the CRTVG;
- also, sociocultural responsibilities, since, as noted by García González and Veiga Díaz (2009, pp. 241–242), translation and subtitling in the CRTVG appear to be primary tools in language normalisation strategies.

The Galician case is an example, according to García González and Veiga Díaz (2009, pp. 244–245), of how audiovisual companies prioritise the use of the Castilian language as a filming or recording language, retrospectively dubbing into Galician for its screening in cinemas located in Galicia or for its broadcast on the CRTVG. It is a practice that finds its institutional endorsement in the diffuse definition of “Galician audiovisual work” by AGADIC, the Axencia Galega das Industrias Culturais (<http://www.agadic.gal/>): one that broadcasts more than 75% of its dialogues or its narration in the Galician language. The results of such a regulatory lack of definition are meaningful: of the 12 projects supported in 2017 by this public agency, only five of them substantiate the use of Galician as the exclusive filming language.

As indicated by Ledo-Andión et al. (2016, pp. 322–323), AGADIC now takes over the management and promotion functions of the audiovisual sector in Galicia. AGADIC was created by a progressive government during the period 2005–2009, imposing a management model based on the relationship with the client of the audiovisual sector. This model, based on Law 6/1999 (Lei 6/1999, 1999) proclaims the protection of the linguistic identity of the audiovisual work but encourages the use of dubbing in those audiovisual works that request public subsidies. Consequently, audiovisual dubbing in post-production increases by not requiring the Galician language in the entire audiovisual production process.

The failure of Law 6/1999 does not extend only to subtitling, but also to dubbing: 1 decade after implementing the regulation, García González and Veiga Díaz (2009, pp.

245–248) describe how the pyrrhic distribution of copies dubbed into Galician, barely covering the six main cities in Galicia, creates an outlandish situation for the Galician language, perpetuating its status as a minoritised language.

Two decades after the enactment of Law 6/1999, the 5^o *Informe Sobre el Cumplimiento en España de la Carta Europea de las Lenguas Regionales o Minoritarias, del Consejo de Europa 2014-16* (5th Report on the compliance in Spain of the European Charter for Regional or Minority Languages, of the Council of Europe 2014-16), is remaining silent on the subject of the relevance of subtitling audiovisual and film in the Galician language, while the practice of dubbing is limited to the Television of Galicia (Ministerio de la Presidencia y para las Administraciones Territoriales, 2017, p. 106).

Regarding the case of Catalonia, a “Stateless Nation” (Schlesinger, 2000, pp. 19–20), which has a population of more than seven and a half million inhabitants, 1 year after the approval of Law 1/1998, of January 7, on language policy, only 2.12% of the total of the tickets sold in Catalonia corresponded to “films in Catalan”: a label that included both those filmed in Catalan and foreign productions dubbed into this language (Martín-Alegre, pp. 11–12). A disconcerting starting point, since, although the profile of the predominant cinemagoer in Catalonia is somebody who has been schooled in Catalan, they do not seem to opt for watching films in this language — be it in OV, OVS or dubbed — a fact that made it impossible to achieve the objective of 50% of cinemas with screenings exclusively in Catalan, which was the purpose of Law 1/1998 (Martín, 2005, pp. 8–9).

The Generalitat de Catalunya decided to expand the case study on works eligible for subsidies, going on to recognise as “Catalan cinema” any film whose vehicular language was Catalan, in addition to those produced in its industrial network. This controversial financial support by the Generalitat of the dubbing of Hollywood productions, leading to the increase of the consumption of audiovisual works in Catalan regardless of its origin, could only prove its effectiveness in the long term.

Indeed, almost three decades after the implementation of this package of measures by the Generalitat, the report by the Institut d’Estadística de Catalunya (2016) indicates that of the total box office revenue (686) in 2016 (€122.460.000), €11.134.000 correspond to Catalan films, compared to €8.804.000 for films from the rest of Spain, with a box office revenue amount for the screening of foreign films of €102.387.000.

The issue to be challenged regarding these policies is the pre-eminence of dubbing over subtitles that — to satisfy commercial and industrial rather than cultural criteria — violates the spectator’s right to enjoy the film in its original narrative, stylistics, acting and linguistics, while revealing the weak commitment of administrations in their pledge to the normalisation of their respective languages: “not even the best-quality dubbing (...) can avoid manipulating dialogue in the translation and adjustment processes” (Martín-Alegre, 2005, p. 21).

In fact, in June 2017, the Catalan press (Nerín, 2017) echoed the question raised by the president of the Acadèmia del Cinema Català, Isona Passola, to the Catalan Parliament about the critical situation of Catalan cinema: only 20 of the 65 Catalan films produced in 2016 had been originally made in Catalan, which represented 31%; likewise, only 0.7% of the films shown in Catalonia had been shot in Catalan. Thus, since there is a prevalence in the filming of using Castilian Spanish (45%) and a gradual consolidation of English (15%), the filmmaker requested a specific policy from the Generalitat to support productions made entirely in Catalan.

In this sense, the data on viewers distribution according to the type of audiovisual version, between 2016 and 2018 (Table 2), is very eloquent, according to Caballero-Molina and Jarrod (2019, p. 216), with a clear preference for audiovisual dubbing.

VERSION	VIEWERS 2016	VIEWERS 2017	VIEWERS 2018
Original	51.425	213.146	44.598
Dubbing	388.520	382.355	244.507
Subtitled	133.343	133.772	105.723
Total	573.288	729.273	394.828

Table 2 Viewership in each version (2016-2018)

Having defined the radical differences between the Galician and Catalan model, we can find a midpoint in the model of the Basque Country: a “Stateless Nation” (Schlesinger, 2000, pp. 19–20), which has a population of more than two million people, with a formula halfway between the dubbing empire and the occasional subtitling practices, albeit with very modest results. As described by Deogracias and Amezaga (2016, p. 694), with the implementation of the “Zinema Euskaraz” programme by the Basque government, since 2010, an average of 30 films have been shot in the Basque language — including fiction, documentaries and animation — broadcast with subtitles in Spanish in Basque cinemas and dubbed into Spanish for the Spanish market. Likewise, since 2012, a yearly average of between 12 and 14 films have been dubbed into Basque, aimed at children and adolescent audiences. The screening of films in Basque would have a minimal presence in overall ticket sales, in a ratio of one to 30, so the deployment of dubbing combined with subtitling still fails to achieve optimal results: “and that is precisely one of the problems of cinema in minority languages, beyond the output quantity: access to a large enough public to make the investment profitable” (Deogracias & Amezaga, 2016, p. 694).

According to the data obtained from the response in the Basque Parliament to an interpellation of the political party EH Bildu, in 2019 on Basque television (Euskal Telebista or ETB, created by Law 5/1982, of May 20, as “Basque Radio Television Public Entity”; Euskadi Osorako Erabakiak, 1982) a total of 25 hours of audiovisual content were dubbed, while in 2020 increased to 66. Regarding the proportion of subtitled content throughout 2020, the consolidated data varies depending on the channel (Table 3).

CHANNEL	TYPOLGY OF AUDIOVISUAL CONTENT	PERCENTAGE OF SUBTITLED CONTENT
ETB1 and ETB1 HD	General television with a full programming schedule in the Basque language	25%
ETB2 and ETB2 HD	General television with a full program schedule in the Spanish language	72%
ETB3	Children's and youth channel with a full programming schedule in the Basque language	65%
ETB4	General entertainment channel with a bilingual programming schedule, in Spanish and Basque	36%

Table 3 Subtitled content on ETB channels

ETB's goal is to achieve a 90% subtitling percentage in all its channels. Another of ETB's strategic objectives is the preferential subtitling of audiovisual content aimed at the youngest: thus, of the 246 hours subtitled in 2020, 184 had young people as recipients, compared to 62 aimed at adults.

At this point, a major question arises: would it be possible to extrapolate the three cases analysed, located in the Iberian Peninsula, to the complexity of the European audiovisual reality? Indeed, the three cases analysed share a transcendental problem regarding heritage and commercial aspects in the EU audiovisual policy: a redefinition of the film's nationality.

In October 2005, the General Conference of Unesco held in Paris approved the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005). Two years later, the European Union proceeded to ratify the Paris Convention (Lévy-Hartmann, 2011, p. 1), emphasising the defence of a European culture understood as a diverse fact and incorporating a strict formalisation of cultural promotion and safeguarding in all community trade agreements (Crusafón i Baqués, 2012, p. 1). Thus, in audiovisual matters, a European positioning strategy was promoted on a global level that, through bilateral alliances, openly challenged the chronic prevalence of the United States and some emerging countries.

Let us pause at this point to analyse an interesting paradox: if, with the ratification of the Paris Convention, the European Union countries jointly promote an intensive and expansive foreign policy of their culture understood as a differentiating factor, why, then, have certain "Stateless Nations" (Schlesinger, 2000, pp. 19-20) located territorially within the European Union been driven to enact particular protection regulations on the distribution and the exhibition of those films produced in their respective vernacular languages?

The question confronts us full-on with a debate as urgent as neglected on the European audiovisual scene. A debate that, although it is understood to have been overcome in political and administrative terms — fundamentally concerning the management of audiovisual rights —, is still a hot topic in cultural and linguistic terms: we are referring to the definition and institutional recognition of the nationality of the audiovisual work.

In practice and up to now, the granting of community protection and subsidies to a specific film depends on its "definition of Europeanness": thus, in the audiovisual

field, we find two legal references, the European Convention on Transfrontier Television, passed by the Council of Europe in 1989, and the Audiovisual Media Services Directive, in force since 2010, although amended in 2016 (Directive (EU) 2018/1808, 2018; European Convention on Transfrontier Television, 1989).

Beginning with the European Convention on Transfrontier Television, the consideration of “European films” is granted to both productions and co-productions managed by European individuals or legal entities (Azpillaga y Idoyaga, 2016, pp. 6–7), implementing a percentage criterion linked to their fiscal residence.

On the other hand, the articulated Audiovisual Media Services Directive (Directive (EU) 2018/1808, 2018) recognises as “European” all audiovisual works from one of the European Union member countries, as well as other signatories of the European Convention on Transfrontier Television, provided that:

- at least 51% of the financial or personnel contribution is from the European Union;
- the non-European Union states that are beneficiaries of the directive undertake, in reciprocal mutuality, not to discriminate against genuinely European audiovisual works or the result of the convention on transfrontier television;
- films not from the countries above are framed in bilateral co-production agreements, provided the first criterion is met.

Now, in what way are the aforementioned generic criteria implemented in specific community promotion and subsidy measures? And no less important, are there significant differences, or even obvious contradictions, between the European regulatory framework and its transpositions in each of the member states?

As Katharine Sarikakis (2014, p. 55) warns, the success of the European project is based on the resignation of the nation-state to the former’s sovereignty and jurisdiction over a variety of political areas. Similarly, Eva Nowak (2014) argues how regulation and deregulation in European media policy generated “negative integration” (by removing national barriers to promote the free movement of products and services) and a “positive integration” (by encouraging market regulation through harmonisation of European policies; p. 97).

Before untangling the Gordian Knots outlined, it is advisable to undertake a careful review of EU Regulation of no. 1295/2013 the European Parliament and of the Council, of December 11, 2013, establishing the Creative Europe Programme (2014 to 2020) and repealing Decisions no. 1718/2006 /EC, no. 1718/2006 /EC, no. 1041/2009 / EC (Regulation (EU) No 1295/2013, 2013): within it, the MEDIA subprogramme reserves the status of a “European company” to those established in European Union territory, owned by citizens residing in the EU Member States, the European Free Trade Agreement or other countries participating in MEDIA.

Regarding the core theme of this paper — subtitling — Azpillaga & Idoyaga (2016, pp. 12–13) highlights in the MEDIA subprogramme its declared will to protect linguistic and cultural pluralism, with clear positive discrimination towards those companies and productions from countries and regions with low production potential or belonging to reduced language and/or geographical areas.

However, each member state's legislation has added further aspects to the initial consideration of "European work", such as the requirement of a "certificate of nationality" used to calculate screen shares. The system of subsidies and aid to cinema managed by the Spanish government describes the requirements for obtaining this (Ministerio de Cultura y Deporte, 2019). Those include the "preferential" production of the OV in any of the official languages of the state should be highlighted: a preferential criterion, although not exclusive, that does not include the obligation to maintain the original language option in the screening of the film.

Regarding the calculation of screen shares, Article 18 of the Spanish Film Law (Ley 55/2007, 2007) stipulates a minimum screening fee of 25% of community films on the total volume of films screened in the cinema. In contrast, Article 29 decrees the aid to those cinemas with a diverse film offer: even, in collaboration with the Autonomous Communities, specific support measures are contemplated for those independent cinemas that, in their annual programming, include a proportion of Latin American and EU feature films that is larger than 40%, prioritising those with exclusive screenings in OV. Likewise, Article 29 contemplates grants of up to 50% — chargeable to the cost of printing copies, subtitling, advertising and promotion, technical means and resources that facilitate access to groups with sensory disabilities — to those independent cinemas that, for a continuous time of no less than 3 weekends, programme feature films from Europe and Latin America in OV.

As a corollary to this section and in order to complete this intricate regulatory medley — ranging from EU regulation to a jumble of particular transpositions in the different EU states — we will now turn to sub-state protection systems exemplified in two antagonistic legislative models:

1. On the one hand, and as previously mentioned, Galicia has a general framework for protecting its own productions and the use of the Galician language in the audiovisual field through its Law No. 6/1999, of September 1, from Audiovisual de Galicia. However, such legislation lacks a subsequent regulatory development, except for the law destined for publicly owned media — Law No. 9/2011 of November 9, on the Public Media of Audiovisual Communication in Galicia. Nevertheless, even when it promotes the timely protection of a language pattern, it foregoes a detailed development of the said regulatory model on the audiovisual field understood in all its amplitude: from ideation and production to exhibition or distribution.
2. On the other hand, and in contrast to the previous model, Catalonia has idiosyncratic and developed regulations — ones that detail the protection quotas for the distribution and the exhibition of films in Catalan — based on the specific law of language normalisation of Catalan (Law No. 7/1983, of April 18 and Law No. 1/1998, of January 7, on language policy; Lei 1/1998, 1998; Lei 7/1983, 1983). The Generalitat de Catalunya has articulated a profuse battery of provisions covering the entire value chain of audiovisual content — from ideation to production, post-production and distribution or exhibition — ranging from rating the works to registering companies even those going through the filming notification protocol. For all these reasons, Catalonia constitutes a benchmark among the various "Stateless Nations" (Schlesinger, 2000, pp. 19–20) that, in practice, limit their activity to the deployment of requests for grants or to representing the Instituto de la Cinematografía y de las Artes Visuales in limited budget protection actions mainly geared towards distribution and screening.

5. CONCLUSIONS AND DISCUSSION: KEY CHALLENGES AND RECOMMENDATIONS TO PROVIDE EUROPE WITH A FILM-SUBTITLING PROTOCOL

“The best media policy is no media policy”. This unambiguous dictum is associated with the late Rudolf Augstein, journalist, founder and longstanding editor-in-chief of Germany’s most important news magazine, *Der Spiegel*. He came from and worked in a large European state, and he was a furious defender of press freedom. Would he have modified this statement when confronted with media realities in a small state, eventually being part of a larger language area with one large country dominating the area? (Trappel, 2014, p. 239)

As mentioned above, one of the main difficulties in assessing the effectiveness of a specific cultural policy is that only in the long term can it prove its success or ineffectiveness, most of the time when it is already too late to consider strategic repositioning (Sanz, 2011).

In the different European case studies analysed, we have shown the political-regulatory comparison between dubbing and audiovisual subtitling and the prevalence of dubbing in terms of subsidies. And all this despite:

- in strictly commercial terms, the average cost of subtitling is 10 times lower than the average cost of dubbing;
- in artistic terms and contrast to dubbing, subtitling does not infringe on but rather consolidates the spectator’s right to enjoy work in its original integrity.

Consequently, one of the recommendations to endow Europe with a film subtitling in non-dominant languages protocol urges European political-regulatory action to transcend that short-term satisfaction of inveterate consumption habits anchored in dubbing instead of promoting its renewal through long-term educational and cultural policies. Policies to guarantee the intimate experience between the viewer and the audiovisual story in its original language, either through the OV — when language proficiency allows it — or through OVS.

Another problem repeatedly isolated in our analysis points on the need to vary the causal focus of the reduced projection of cinema in minoritised languages, replacing the merely commercial perspectives — which claim a shortage of the demand of the potential public — by other cultural ones, which point to the scarcity of supply, visibility and accessibility to this type of content, due to an unstable distribution and broadcasting network.

It is appropriate to introduce here a contrapuntal reflection at the hands of Philip Schlesinger (2016), who, in the framework of reviewing the concept of “creative economy”, shows his concern for the consolidated conception of culture subordinated to economic considerations:

The idea of the creative economy has increasingly obscured and crowded out conceptions of culture that are not in some way subordinate to economic

considerations. Intelligent policy-makers and smart government advisers know that this is so and that their evidence rests on uncertain grounds — at least, that is what they tell me privately. What figures in such conversations does not, on the whole, enter the public domain because the expedient argument that turns culture into economic value is seen as the only really comprehensible and sellable formula in our times. That is one of my conclusions from empirical research on and engagement in this topic. (p. 189)

All this in a context of the prevalence of distribution and exhibition in cinema GVC, which explains the exponential increase in the number of niche markets and the inevitable relegation of the movie theatre to a residual role — more as a “vintage symbol” than as a source of profitability — so it is worth insisting on two considerations:

- neither OV nor OVS hamper the screening process, being forms of communication that perfectly overlap in the process of digitalising cinemas;
- audiovisual subtitling guarantees the integrity and linguistic originality of the work in question, and it also guarantees understanding to all those without competence in that language.

Hence our strong recommendation to the different European public administrations, along with Deogracias and Amezaga (2016, p. 707), of the need to encourage — beyond traditional subsidising policies — a new concept of “linguistic accessibility”: a capacity that would have to be based on a firm commitment to the expansion of cultural competences at European level, so that their citizens become accustomed to cultural fruition conveyed by non-dominant languages, perceiving the European linguistic diversity, no longer as a barrier to be avoided, but as a priceless intangible cultural heritage to vindicate.

Accordingly, as the methodological section of this article ventured, the application of the Delphi technique allowed a contrast of significant conclusions, based on the degrees of consensus ($C < 0.2$) existing on the expert panel, that can be synthesised in six key challenges and recommendations:

1. The OVS constitutes the best antidote against the linguistic disintegration of the original audiovisual work.
2. The production costs of audiovisual dubbing are 10 times higher than the OVS costs.
3. Unlike audiovisual dubbing, OVS protects the original integrity of audiovisual work.
4. European linguistic diversity should not be seen as cultural barriers but rather as opportunities for enriching the European Cultural Heritage.
5. It is an urgent duty of the Council of Europe to redefine the nationality of the audiovisual work based on its original linguistic choice.
6. The coordinated action of communication policies will demonstrate the close relationship between VOS promotion and the linguistic normalising process.

Likewise, we request, from the Council of Europe — as a supra-state entity that coordinates the actions of the European Union states — an urgent redefinition of the concept of “nationality of the audiovisual work” essentially linked to the original linguistic

choice from its conception and production, instead of the number of territorial settlement percentages involved in its funding and human resources, currently in force at both the European Convention on Transfrontier Television in 1989 and the Audiovisual Media Services Directive (Castelló-Mayo et al., 2018, p. 41).

The protocol to be adopted by the European Union should also assume a prospective eagerness for the formalisation of those emerging formats, although usually inspired by film works: thus, we understand that, in the expansive field of the videogame industry, the implementation of concrete and stable actions so belligerent against linguistic intrusion as guarantors of the most vulnerable cultural identities:

it is rather usual to find foreign words in Spanish; in many cases, they eventually become a part of the language, sometimes adapting them to Spanish phonology and grammar (borrower words). Especially, the video game industry is full of English terms that are not translated due to the late entrance of the word in the Spanish market. (Méndez-González, 2014, p. 197)

Nor must we forget, considering the implementation of a protocol to encourage subtitling in non-dominant languages, that their status often hinders the internal and external projection of minoritised languages as “target languages”, that is, vehicular languages for subtitling or dubbing. To a lesser extent, they are manifested as “source languages”, that is, as languages subject to translation: a problem that explains the extreme vulnerability of these minoritised languages in the light of the influence of other languages with a linguistic corpus more consolidated and settled by its preponderant condition.

Finally, we will point out as one of the unexplored niches in this article (which we hope to return to in future publications) the potential of subtitling in the integration of citizens with specific sensitive disabilities in non-hegemonic languages:

another challenge concerns the issue of media accessibility. This type of inclusion means that more investment is needed in services such as subtitling for the hearing impaired or descriptions for the visually impaired. Indeed, some participants pointed out that media accessibility is not sufficiently balanced in Europe and varies from country to country. This imbalance is even accentuated when it comes to accessibility for minority languages, which represent the majority of languages in Europe. (European Audiovisual Observatory, 2020, p. 15)

As a corollary to what has already been said, let us insist on the impossibility of a non-dominant minority language renouncing any standardisation tool within its reach, let alone the film subtitle. Film subtitles can make accessible one of the most dominant discourses in our contemporaneity, either for its external projection or for its internal establishment in its original community.

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THE INVISIBLE IMPLICATIONS OF TECHNO-OPTIMISM OF ELECTRONIC MONITORING IN PORTUGAL

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ABSTRACT

In recent years, offenders' supervision has emerged as a new facet of the penal landscape in most Western countries, growing in scale, reach and scope. In Portugal, in addition to community sanctions and prison sentences, electronic monitoring stands out as a way of monitoring offenders. This penal instrument is associated with high expectations created by political discourses and media messages that portray electronic monitoring as an instrument that enables the reduction of overcrowding and pressure of the prison system and its costs. In addition, it is also argued that, by maintaining offenders in the community, electronic monitoring also favours the maintenance of social ties, avoids the potential criminogenic effects of prison, and facilitates resocialisation processes. In this article, drawing inspiration from social studies of science and technology and surveillance studies, I explore the invisible implications of techno-optimism of electronic monitoring in Portugal. Through documentary analysis, based on parliamentary hearings, media pieces, opinion articles, official reports, and scientific literature, I reflect upon how techno-optimism makes the expansion of the penal sphere invisible. Moreover, techno-optimism about electronic monitoring in Portugal also implies the co-optation of family in the criminal sphere and the transmutation of the domestic space into a confinement space. Regarding domestic violence, techno-optimism around electronic monitoring also contributes to the characterisation of this social phenomenon as having a technoscientific solution, thus narrowing the public debate on its prevention.

KEYWORDS

techno-optimism, electronic surveillance, penal sphere, family, domestic violence

AS IMPLICAÇÕES INVISIBILIZADAS DO TECNO-OTIMISMO DA VIGILÂNCIA ELETRÓNICA EM PORTUGAL

RESUMO

Nos últimos anos, a supervisão de ofensores nas comunidades tem-se vindo a constituir como uma nova faceta da paisagem penal na maioria dos países ocidentais, assistindo-se ao seu crescimento em escala, alcance e intensidade. Em Portugal, a par das penas e medidas na comunidade e das penas de prisão, destaca-se a vigilância eletrónica como forma de monitorizar ofensores. Este instrumento penal é associado a elevadas expectativas criadas por discursos políticos e mensagens mediáticas que retratam a vigilância eletrónica como um instrumento que permite reduzir a sobrelotação e a pressão sobre o sistema prisional e os custos associados. Ao mesmo tempo, também é argumentado que, ao manter os ofensores na comunidade, a vigilância eletrónica favorece igualmente a manutenção dos laços sociais, evita os potenciais efeitos criminógenos da prisão e facilita os processos de ressocialização. Neste artigo, inspirando-me nos estudos sociais da ciência e tecnologia e nos estudos da vigilância, exploro as implicações invisibilizadas do tecno-otimismo em torno da vigilância eletrónica em Portugal. Por via de análise documental,

baseada em audições parlamentares, peças jornalísticas, artigos de opinião, relatórios oficiais e literatura científica, reflito sobre a forma como o tecno-otimismo tem invisibilizado a ampliação da malha penal; implicado a cooptação da família na esfera penal e a transmutação do espaço doméstico num espaço de reclusão; e, no que concerne à violência doméstica, a caracterização deste flagelo social como tendo uma solução tecnocientífica, estreitando, assim, o debate público sobre a sua prevenção.

PALAVRAS-CHAVE

tecno-otimismo, vigilância eletrónica, malha penal, família, violência doméstica

1. INTRODUCTION

In 2012, as part of the fieldwork I developed in the prison context for my PhD thesis, I talked to a prisoner who worked in the bar dedicated to professionals and prison' external members. During the breaks from the strenuous consultations of judicial and criminal proceedings, the conversation with prisoners who circulated in the prison's administrative area was a balm that I enjoyed voraciously. In one of those conversations, the prisoner who used to serve me coffee as soon as I entered the bar briefly told me his life story. Among several other things, he shared that he had already been "imprisoned at home", under the electronic monitoring system, before entering the prison in which we were, at the time one of the most overcrowded in the country, in a year in which the official overcrowding record was the second-highest in the decade (112.7%; PORDATA, 2021). My curiosity skyrocketed. Of all the interviews I had carried out so far, none of the interviewed prisoners had been under electronic monitoring. My first instinct, already marked by several months of fieldwork in prisons, where I saw many episodes and heard many reports that reflected the hardness and "pains of imprisonment" (Sykes, 1958), was to consider that this would have been a calmer period. I replied, "it must have been a lot better than being here now". Looking at me with an expression that reflected how naïve he considered me to be, the prisoner kindly responded, "no. You can't imagine what it's like to be imprisoned at your own home. With freedom on the other side, without being able to reach it".

In the almost 10 years that separate me from this fieldwork experience, I have never forgotten this conversation. It comes to my memory whenever I read and hear representatives of public entities praising the "humanising" effect of the electronic monitoring system (Caiado, 2014), considered by the highest officials of the administration of justice in Portugal "one of the best in the world" (Direção-Geral de Reinserção e Serviços Prisionais, 2020, para. 3). I also recall this interaction every time I read or hear about the most recent statistics on electronic monitoring, showing an evident expansion of this instrument in recent years (Direção-Geral de Reinserção e Serviços Prisionais, n.d.-e). The apparent contradiction between this prisoner' narrative and the dominant discourse, based on techno-optimism (Quinlan, 2020), leads me to question in this article, through a historically and sociologically informed scepticism (Benjamin, 2019, p. 26), the use of electronic monitoring in Portugal.

In recent years, supervision of offenders in communities has emerged as a new facet of the penal landscape in most Western countries, growing in scale, reach, and intensity (Hucklesby et al., 2021; Laurie & Maglione, 2020; McNeill & Beyens, 2013; Nellis et al., 2013). In Portugal, in addition to community sanctions and prison sentences, electronic monitoring stands out as a way of monitoring offenders. This penal instrument is associated with high expectations created by political discourses and media messages that portray electronic monitoring as an innovative and effective way of dealing with issues of crime and public safety and as a mechanism that allows reducing overcrowding and pressure on the system prison, as well as its associated costs. In addition, it is also argued that, by maintaining offenders in the community, electronic monitoring also favours the preservation of social ties, avoids the potential criminogenic effects of prison, and facilitates resocialisation processes (Caiado, 2014; Martins, 2019). However, such widely shared arguments lack confirmation as few studies explore in-depth the effectiveness, functions, and implications of this penal instrument (see in this regard Baiona & Jongelen, 2010; Lopes & Oliveira, 2016).

In this article, drawing inspiration from social studies of science and technology and surveillance studies, rather than debating the efficiency of the electronic monitoring system in Portugal, I aim to explore how socio-technical imaginaries (Jasanoff & Kim, 2015) around this penal instrument reflect a broad techno-optimism (Quinlan, 2020). More particularly, I reflect upon how techno-optimism has made invisible (a) the expansion of the penal network; (b) the co-optation of the family in the penal sphere and the transmutation of the domestic space into a space of confinement; (c) and, concerning domestic violence, the characterisation of this social phenomenon as having a techno-scientific solution, thus narrowing the public debate on its prevention.

2. ELECTRONIC MONITORING IN PORTUGAL: HISTORICAL BACKGROUND AND EXPANSION

Electronic monitoring was introduced into the Portuguese legal system with the amendment to the Criminal Procedure Code of 1998, which associated it with controlling the coercive measure of obligation to remain in the home to establish an alternative to pre-trial detention. However, it only started to be implemented in 2002 as part of an experimental program in some districts. In 2005, a specialised network of electronic monitoring services was created in Portugal, which allowed the usage of this technology in all the national territory.

In 2007, electronic monitoring also became associated with house arrest (execution of prison sentence at home) and with the adaptation to parole and the supervision of the prohibition of contacts between offenders and victims of domestic violence in the context of an additional sentence. In 2009, the supervision of forbidden contacts between offenders and victims of domestic violence was extended to the context of a coercive measure, provisional suspension of the process, and suspension of prison sentence enforcement. In the same year, with the approval of the Código de Execução das Penas e Medidas Privativas da Liberdade (Code for the Execution of Sentences and Measures

that Deprive Individuals of Liberty), electronic monitoring also became an instrument available to supervise the modification of the execution of the prison sentence for cases of prisoners with illnesses, disabilities, or of old age. In 2015, electronic monitoring was extended to the supervision of the prohibition of contacts between offenders and victims of stalking (Direção-Geral de Reinserção e Serviços Prisionais, n.d.-f).

Finally, the legislative review carried out by Law No. 94/2017 of August 23 (Law n.º 94/2017, 2017) determined the elimination of the penalty of imprisonment for free days and semi-detention, giving the possibility of cases in execution being turned into house arrest sentences. That is, it determined that house arrest with electronic monitoring should be used, with the possibility of the monitored individual leaving to attend resocialisation programs, educational or professional activities or other obligations appropriate to his/her social reintegration process. This same legislative review also provides that, in the context of forest fire' crimes, the suspension of the execution of the prison sentence and parole may be subordinated to the obligation to remain at home, with electronic monitoring, in the period coincident with the months of highest risk of fire occurrence (Figure 1; Direção-Geral de Reinserção e Serviços Prisionais, n.d.-f).

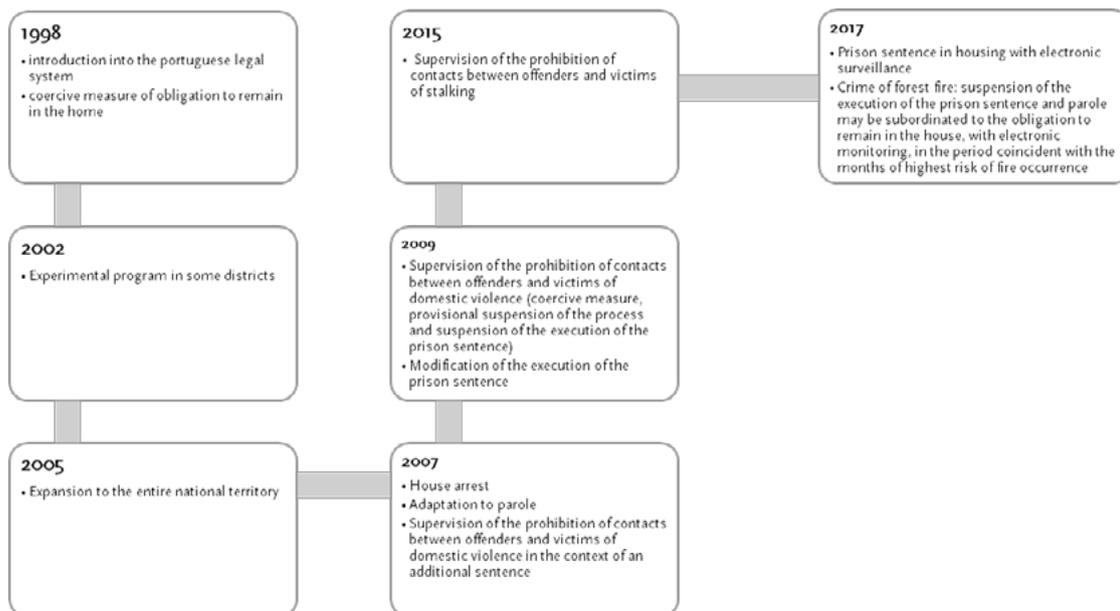


Figure 1 Regulation of electronic surveillance in Portugal

Source. Direção-Geral de Reinserção e Serviços Prisionais (n.d.-f)

In this sense, Law No. 33/2010 of September 2 (Lei n.º 33/2010, 2010) currently prescribes that electronic monitoring can be used: (a) to ensure compliance with the obligation to remain at home (applied as an alternative to preventive detention); (b) in the execution of a prison sentence under a regime of house arrest; (c) as an adaptation to parole (referring to the anticipation of parole for a maximum period of one year); (d) to modify the execution of the prison sentence; (e) to monitor the prohibition of contacts between defendants/convicts and victims of domestic violence and stalking; (f) to

guarantee the obligation to remain at home in cases of individuals convicted for forest fire' crimes. Due to its "chameleon" character, electronic monitoring is applied at different stages of involvement with the criminal justice system, used in different ways, with multiple goals and in a wide variety of criminal sanctions. This diversity is not exclusive to the Portuguese context, as it is also found in other countries (Beyens, 2017; Dünkel et al., 2017; Hucklesby et al., 2021).

The Portuguese law prescribes that electronic monitoring does not entail any financial costs for the defendants or convicted individuals and depends on their consent and those who cohabit with them (if over 16 years of age). The national electronic monitoring system uses two different types of technology: radiofrequency and geolocation. Radiofrequency technology is used in cases of house arrest and geolocation in cases of the supervision of the prohibition of contacts between offenders and victims of domestic violence and stalking (it monitors two people simultaneously, offender and victim). In the latter case, referring to geolocation in cases of domestic violence and stalking, the judicial authorities define the victim's protection zones (such as, for example, home and workplace) and its radius, which can be adapted by the electronic monitoring services depending on the circumstances of those involved, namely profiles, routines, and geographical constraints. The offender is assigned a personal identification device (electronic bracelet) and a mobile positioning unit that establishes a relationship with the global positioning system (GPS). The victim is also assigned a "protection unit" device, which "must always be carried by the victim and establishes a GPS connection" (Direção-Geral de Reinserção e Serviços Prisionais, s.d.-a, p. 2). This protection unit device is not connected to the victim's body. They are recommended to carry it, but not obliged. The electronic monitoring services monitor and detect possible approaches of the offender. If he/she approaches or enters the exclusion zones, the victim is informed, and the offender is automatically alerted and can be questioned by the electronic monitoring services. Electronic monitoring services contact police forces to provide protection and support to the victim, if necessary.

According to the latest available data, as of December 31, 2020, 2,432 penalties and measures were monitored in the national territory through electronic monitoring services. Amongst the penalties and measures applied, the following stand out: supervision of the prohibition of contacts between offenders and victims of domestic violence (prohibition of contacts by geolocation; 54.23%), obligation to remain in the home in cases of individuals convicted for crimes of forest fire (22.28%) and house arrest (19.94%; Direção-Geral da Política de Justiça, n.d.).

According to the last available report of the General Directorate of Reintegration and Prison Services (Direção Geral de Reinserção e Serviços Prisionais, n.d.-c), referring to the year 2019, radio frequency had a cost of €6.33 per day and radio frequency €8.24 (per monitored person). The revocation rate, relating to penalties and measures and penalties revoked due to non-compliance (Direção-Geral de Reinserção e Serviços Prisionais, n.d.-b), between 2013 and 2018, was between 2.80% and 3.60%, with no data available for the year 2019.

The organisational structure of the National Electronic Monitoring System comprises a national control centre located in Lisbon, and 12 territorial teams, which in 2020 comprised 141 professionals, including 12 team coordinators, 24 senior technicians, 100 social reintegration technicians and five technical assistants (Direção-Geral de Reinserção e Serviços Prisionais, 2020). In 2021, reinforcing its commitment to this technology, the Ministry of Justice, through the General Directorate of Reintegration and Prison Services, signed, with effect from March 1, a new contract to ensure the provision of electronic monitoring services for execution of court decisions for the period between 2021 and 2024 (Direção-Geral de Reinserção e Serviços Prisionais, 2021).

3. ANALYTICAL PERSPECTIVES

This article is at the intersection of two interrelated fields of study, surveillance studies and science and technology social studies. Surveillance studies aim to problematise the multiple forms, motifs, and consequences of monitoring, supervising and governing populations (Frois, 2013; Fuchs, 2011; Lyon, 2002, 2003, 2018; Marx, 2002; Staples, 2014). Focusing both on spatially defined locations, such as airports, prisons, and companies, as well as on the digital context, such as social networks or databases, this field of study highlights how surveillance can interfere and condition (sometimes without knowledge or consent) civil rights such as freedom, privacy, and confidentiality (Frois, 2015). We are in a context strongly marked by the expansion and intensification of surveillance — massively strengthened after the 9/11 terrorist attacks in the United States of America (Lyon, 2003) — and by neoliberal corporate regimes, which increasingly subjugate several spheres of social life (Dardot & Laval, 2016; Harvey, 2005; Mirowski, 2019). Thus, contemporary modes of surveillance constitute mechanisms of social sorting that verify identities while assessing risks, thus contributing to discrimination and, in some cases, segregation of individuals and groups (Lyon, 2002).

Within this body of literature, William Staples (2014) frames electronic monitoring as a type of “participatory monitoring” in which people who are subject to such measures also have the task of actively participating in their own surveillance. According to the author, as to Bentham’s panoptic model, electronic monitoring allows constant movement surveillance. However, this type of power operates in a more incisive way:

instead of subjecting the body to a regimented system of institutional discipline and control, this disciplinary technology is located on the body itself. Disciplinary power then has been deinstitutionalized and decentralized. And unlike the somewhat primitive panoptic tower that could practically view only a limited number of cells, this cybernetic machine is capable of creating an infinite number of confinements. (Staples, 2014, p. 84)

In the wake of Michel Foucault’s (1975) analytics of power, electronic monitoring follows new principles of disciplinary power. Electronic monitoring is part of a modern discourse (normalising but eminently optimistic) that establishes it as an efficient

technique (economically, politically, and morally) through which power systems aim and produce the singularisation and subjection of individuals. Such devices, operating through invisibility, place the body as a target of power (Morais, 2014).

Social studies of science and technology is an interdisciplinary field that studies the production, distribution and use of scientific knowledge and technological systems and the consequences of these activities for different groups (Jasanoff, 2004; Latour, 1987, 2000; Latour & Woolgar, 1986; Law, 2008; Lynch, 2012). Within this field of studies, it is evident that technologies, commonly considered as “neutral”, objective, scientific and conducive to social progress, are imbued in social norms and ideologies that are a constitutive part of their creation, development, and implementation, therefore, reinforcing various forms of inequality (Benjamin, 2019).

From this body of literature, the concept of socio-technical imaginaries proposed by Sheila Jasanoff and Sang-Hyun Kim (2009) as “collectively imagined forms of social life and social order reflected in the design and fulfilment of nation-specific scientific and/or technological projects” (p. 120) is particularly useful. Conceptualising imagination as a social practice, the concept of socio-technical imaginaries refers to socially shared imaginaries that guide how we think and make decisions at the individual and the collective level (Jasanoff & Kim, 2009, 2015). Thus, socio-technical imaginaries include not only widely shared belief systems but also notions that prescribe what is desirable, constituting “aspirational and normative dimensions of social order” (Jasanoff & Kim, 2015, p. 5). Therefore, socio-technical imaginaries are rooted and inscribed into institutions, culture, and artefacts, constituting a shared vision of a future achievable through advances in science and technology (Jasanoff & Kim, 2015).

As explained by Andrea Quinlan in her work on forensic rape kits in the United States of America (Quinlan, 2020), techno-optimism around some technologies has been co-constructed (Jasanoff, 2004) as a socio-technical imaginary anchored in the idea that science and technology can effectively solve complex problems in the criminal justice system. That is a socio-technical imaginary inscribed in institutions, culture, and artefacts (Jasanoff & Kim, 2009) and widely disseminated by the media, policymakers, activists and victims (Quinlan, 2020).

The concept of techno-optimism shares similarities with the term techno-solutionism, proposed by Evgeny Morozov (2013), anchored in the idea that technology, through its codes, algorithms, and infrastructures, can solve problems facing humanity. Morozov argues that this drive towards efficiency obliterates other avenues for approaching and solving social problems, leading to a context where tech companies, rather than democratically elected governments, determine the future’s shape. However, the focus on how business corporations own and control technologies presents stark differences from the case of electronic monitoring, whose legislation, implementation, and expansion has been promoted and controlled at the State level.

4. SOCIO-TECHNICAL IMAGINARIES AROUND TECHNO-OPTIMISM IN PORTUGAL

In Portugal, socio-technical imaginaries around techno-optimism have broad historical, social, and cultural roots. Portugal is a country strongly marked by a long period of dictatorship in the 20th century (1926–1974), characterised by political and police repression and censorship (Pimentel, 2007; Ribeiro, 1995), which left a lasting mark on society and especially on the legal and criminal justice culture in Portugal. After the democratic revolution of 1974, and especially after Portugal's admission to the European Union (1986), the Portuguese State mainly focused on investing in modernisation and progress, as a way of “catching up” other countries, considered more technologically advanced (Amelung et al., 2020). According to Catarina Fróis and Helena Machado (2016),

in Portugal, the ideal of modernity and the fight against backwardness is so deeply rooted that it has been assimilated into a kind of official rhetoric, to the point where we could almost say it has become a national trait, readily identified by the Portuguese as a defining feature of the national character. (p. 396)

Therefore the emergence of electronic monitoring in Portugal is linked to these pre-existing and persistent socio-technical imaginaries that see modernisation through technological expansion and consolidation as an integral part of how Portuguese society is organised. Similarly to the implementation of closed-circuit television and the creation of forensic DNA databases in Portugal (Frois & Machado, 2016; Machado & Frois, 2014), electronic monitoring is also legitimised by socio-technical imaginaries rooted in the efficiency of technology in criminal justice institutions.

In addition to being anchored in cultural understandings that associate technology with efficiency, speed and neutrality, the techno-optimism around electronic monitoring is also reinforced by political and social concerns regarding prison's overcrowding and high costs. Portugal is one of the countries with the highest imprisonment rate in the European Union, despite recent decreasing trends (World Prison Brief et al., n.d.). Furthermore, it is also one of the countries where the majority of prisoners serve most of their sentences. In the words of Catarina Fróis (2020), “in Portugal, there is much sentencing, for a long time, and this time is served up to the legally stipulated limit” (p. 28). Therefore, such organisation of the criminal justice system entails severe consequences for the Portuguese prisons, which are often overcrowded and largely degraded. In this context, as analysed below, the expansion of electronic monitoring use has been identified as one of the main ways of reducing pressure on prison services.

In this article, I critically explore the techno-optimism surrounding electronic monitoring in Portugal, outlining its invisible implications. Through this analysis, I illustrate how electronic monitoring has been presented and portrayed as a technological solution to a series of broad and complex social and criminal problems related to the governance of crime in its various aspects, namely, victim protection, imprisonment, and rehabilitation. More specifically, I look at how the techno-optimism around electronic monitoring has been limiting the questioning of the effects of electronic monitoring on the penal

network expansion, the ideals on which it is anchored and promoted, and its implications within domestic violence (see also Quinlan 2020).

5. INVISIBLE IMPLICATIONS

5.1. EXPANSION OF THE PENAL NETWORK

Two of the main arguments driving the implementation of electronic monitoring have been reducing pressure and overcrowding in the prison system and, consequently, reducing costs. That is pointed out in official documents and discourses, such as the speech by Rómulo Augusto Mateus, director of the general directorate of reintegration and prison services. At a parliamentary hearing within the scope of the Subcommittee on Social Reintegration and Prison Affairs of the Committee on Constitutional Affairs, Rights, Freedoms and Guarantees (Assembleia da República, 2020), Rómulo Mateus said that “it is fair to say that the electronic monitoring program we have, one of the most robust in the world, took around 2,000 inmates out of prison and that was what allowed the overcrowding to be lowered to below 100%” (33:24). The media widely disseminates such arguments, recurrently pointing to the (alleged) cost reduction provided by electronic monitoring systems. For example, the *Público* newspaper, in 2019, published a piece entitled “Pulseiras Electrónicas Pouparam ao Estado Mais de 13,8 Milhões de Euros” (Electronic Bracelets Saved the State More Than 13.8 Million Euros; Trigueirão, 2019). This conclusion compares the daily cost of someone serving a sentence in prison (€44.88) and an individual under electronic monitoring in the radiofrequency regime (€8.24).

An in-depth analysis of the correlation between the prison population and individuals under electronic monitoring and the costs inherent to each of these measures is beyond this article’s scope. Nevertheless, a simple comparison between the evolution of the prison population over the last 19 years and electronic monitoring measures does not show an inverse linear relationship (Table 1). In other words, if electronic monitoring measures have been increasing, the prison population has been oscillating, sometimes increasing, sometimes decreasing. Therefore, based on these data, it is difficult to sustain the linear argument, so widely propagated, that the increase in electronic monitoring measures has been reducing the prison population.

YEAR	TOTAL PRISONS	TOTAL ELECTRONIC MONITORING
2002	13,698	44
2003	13,817	143
2004	13,152	253
2005	12,889	407
2006	12,636	507

2007	11,587	472
2008	10,807	522
2009	11,099	524
2010	11,613	508
2011	12,681	671
2012	13,614	729
2013	14,284	703
2014	14,003	757
2015	14,222	930
2016	13,779	1 021
2017	13,440	1 088
2018	12,867	1 630
2019	12,793	2 034
2020	11,412	2 432

Table 1 Evolution of prison population and electronic monitoring measures, on December 31 of each year

Source. PORDATA (<https://www.pordata.pt/>) and Estatísticas da Justiça (Justice Statistics; Direção-Geral da Política de Justiça, n.d.)

These data show how electronic monitoring is situated within a complex debate on the (dis)connections between imprisonment, alternatives to prison sentences and community measures. In 1975 Michael Foucault published *Discipline and Punish*, a work that, according to Mallart and Cunha (2019), focused more on the principles and technologies of disciplinary society than on prisons as institutions. Foucault predicted that, as prisons had turned physical punishments obsolete, they were also doomed to decline, within diffuse disciplinary rationality, characterised by more discreet and diversified mechanisms of “disciplinarianisation” of society. Other authors followed Foucault in this prospective analysis. Allied to this idea was the trust in non-penal mechanisms, such as measures in the community (Cunha, 2008).

However, what happened was a more complex phenomenon: if, on the one hand, the use of alternative measures to prison increased, on the other hand, there was also an unprecedented growth of imprisonment rates (Wacquant, 2000). Within this simultaneous expansion, there has been a debate over to what extent mechanisms of offenders’ supervision constitute alternatives to imprisonment that effectively reduce the number of imprisoned individuals and/or constitute an additional response that further expands and diversifies the penal network (Cohen, 1985). That is, moving individuals between different agencies over time that echo and resonate with each other, in a configuration that Fábio Mallart (2019) calls an “archipelago”.

Some authors argue that we are not witnessing the bifurcation of the system whereby violent offenders would be subjected to imprisonment, and people who commit minor offences would be directed towards community measures and other alternatives to imprisonment, such as electronic monitoring. Instead, we see how the proliferation of sentencing and monitoring options ultimately leads to the movement of the same

individuals between different agencies over time. That is a process that Roger Matthews (2013) calls “transcarceration”. As summarised by the author, “the proliferation of sentencing options creates a larger self-referential or autopoietic systems which recycle individuals through a more closely linked network of agencies” (Matthews, 2013, p. 9). Since it is possible to use electronic monitoring both as a front and back door of the prison, this system can expand the period of involvement of offenders with the criminal justice system. That is, both as an alternative to preventive detention and the modality of early release of prisoners through parole adaptation.

5.2. CO-OPTION OF THE FAMILY IN THE PENAL SPHERE AND TRANSMUTATION OF THE DOMESTIC SPACE INTO A SPACE OF CONFINEMENT

In addition to the (alleged) decreased pressure and cost reduction within the prison system, another advantage pointed out in the use of electronic monitoring concerns the “preservation or resume of freedom and family and social ties, aspects that may constitute an important social asset in shaping behaviour and preventing recidivism” (Direção-Geral de Reinserção e Serviços Prisionais, n.d.-d, para. 1). Such arguments are also outlined by the minister of justice who, in an interview with the *Público* newspaper in October 2019, states that “the execution of short sentences outside the prison environment prevents the criminogenic effects of prison while favouring re-entry by keeping the convicted individual in his/her family environment and reducing the risk of recidivism” (Trigueirão, 2019, para. 27). This rationale is anchored in a trend increasingly disseminated in official discourses and in some studies that associate family support, during and after imprisonment — in coordination with social security, health, education, training, and employment — with “successful” social reintegration processes materialised, for example, in the decrease of recidivism rates (Berg & Huebner, 2011; Codd, 2007; Duwe & Clark, 2011; Naser & Vigne, 2006; Visher & Travis, 2003). In general terms, it is argued that offenders who maintain family ties during and after imprisonment tend to be more “successful” in the reintegration process, being less likely to remain involved in criminal activities after the end of their sentence (Baumer et al. , 2009; Mills & Codd, 2008).

This research is fruitful and capable of helping delineate policies to help maintain social ties. However, these studies do not enable the understanding of the complex and dynamic variables inherent to the interconnections between family support, socio-economic conditions and social reintegration processes. As mentioned by Christy Visher and Jeremy Travis (2003), “whereas much of this research confirms the correlation between family ties and post-release success, it fails to address the more difficult issues that could lead to a full understanding of how and why this effect occurs” (p. 102).

Even though these types of influences can, indeed, materialise in “successful” reintegration processes (i.e., avoiding recidivism), caution is needed when placing high expectations on the potential of families to assist processes of social reintegration (Codd, 2007; Mills & Codd, 2008; Touraut, 2012). First, not all families want and/or have the necessary conditions to welcome offenders and support and assist their reintegration.

Generally, the idea that families are key elements in social reintegration involves the notion of households characterised by the sexual division of labour, non-criminal, non-violent, based on harmonious relationships and provided with the necessary monetary, housing, and social resources available to offenders. In other words, “it is the ‘normal’ family that is the basis for the promise of redemption of the offender” (Aungles & Cook, 1994, p. 78). However, this ideal can contradict some families’ socioeconomic conditions and relational dynamics.

In the case of electronic monitoring, it is, therefore, necessary to understand the extent to which families effectively have living conditions capable of ensuring compliance. As an example, I highlight the case of a Portuguese 36-year-old street vendor who, in 2018, had been sentenced to 7 months of house arrest but could not comply because his household did not have legalised electricity, a mandatory requirement for the electronic monitoring system. Consequently, he was imprisoned in a non-continuous detention regime (serving his sentence during weekends). That occurred even though the court recognised the precarious economic situation of the household. As highlighted by Maria João Antunes, one of the jurists who was involved in the creation of the law that allows prison sentences of less than 2 years to be served under an electronic monitoring regime, in statements to the *Público* newspaper, “this case confronts us with the obligations of the welfare State. The system has to evolve” (Henriques, 2018, para. 2).

In addition, how connections between family support and reintegration have been equated reveal a subtle, but still significant, tendency to shift some of the responsibilities of the penal system related to social reintegration to families (Touraut, 2012). As Helen Codd (2007) underlines:

to some extent, therefore, it follows that the government could “shift the blame”, deflecting issues of recidivism away from discussions of the failures of negative, disintegrative punitive practices, towards making it not only a failure of the individual offender but also a failure of his or her family. (pp. 259–260)

In other words, both in social reintegration processes and in the context of electronic monitoring measures, the family becomes the target of a series of expectations that end up co-opting it into the criminal sphere. This orientation reflects broader trends characteristic of neoliberal regimes (Harvey, 2005), gaining prominence and shifting responsibility away from the State and other institutions towards individuals, underlining how rehabilitation has become a matter of individual responsibility (Bosworth, 2007).

Besides the co-optation of family in the penal sphere, electronic monitoring also highlights the transmutation of the domestic space into a place of confinement. Such symbolic redefinition of the house, other than involving changes in daily family routines (such as rearranging schedules and activities), implies that family members become active agents in surveillance processes, in the process of “participatory monitoring” (Staples, 2014) that involves not only the individuals under monitoring but also their relatives (Staples, 2005). As William Staples (2005) underlines through his investigation of the implications of electronic monitoring in the USA context:

through their efforts at “supporting” those on house arrest, intimates become caught up in the role of ancillary “watchers” for the program, creating a kind of collusion between the family goal of getting the offender off house arrest and the official goal of ensuring program compliance. (p. 157)

This transmutation of the domestic space into a penal space was also recognised by the minister of justice, Francisca Van Dunem, when, in November 2018, she published an opinion article in the *Público* newspaper, reflecting upon electronic monitoring:

in a search for alternative solutions capable of ensuring the effectiveness of criminal measures, the 2017 legislator ended up reinforcing, in the Portuguese sanctioning system, the use of a new punitive instrument whose potentialities allow to move the punitive space from the traditional prison environment to a diverse space, such as the convict’s residence, under electronic monitoring. (Van Dunem, 2018, para. 8)

In short, by being portrayed as one of the most critical agents in the reintegration processes (Naser & Vigne, 2006; Vigne et al., 2004), families and the domestic space ultimately co-integrate supervision and control processes. The use of electronic monitoring thus ends up expanding the “collective dimension” (Granja, 2018; Touraut, 2009, 2012) of punishment, discipline, and control that these types of criminal sanctions entail (Staples, 2005, p. 140).

5.3. NARROWING THE DEBATE ON DOMESTIC VIOLENCE

Among all the penalties and measures covered by the electronic monitoring system in Portugal, the prohibition of contacts between offenders and victims of domestic violence (controlled by geolocation) is currently the most expressive (representing in 2020 around 54%; Direção-Geral da Política de Justiça, n.d.). However, the complex ways in which electronic monitoring can work both for and against victims of domestic violence have been largely overlooked. As explained in 2013, by the then director of the electronic monitoring system, Nuno Caiado, in the context of a parliamentary hearing on electronic monitoring for perpetrators of domestic violence, the system of radiofrequency implies an evident involvement of the victim:

it is necessary to understand the type of collaboration the victim can provide when involved in electronic monitoring operations. In reality, the victim will always have an equally active role. The victim is not passive. When subject to electronic monitoring, the victim, because he/she is also subject to electronic monitoring operations, will have an active role and will have to be as cooperative as (...) the offender in electronic monitoring operations. (Assembleia da República, 2013, 26:27)

If the active role of the victim is a *sine qua non* condition for the success of this electronic monitoring regime, it is, therefore, necessary to consider the complex ways in

which electronic monitoring can work both for and against victims of domestic violence. When this system is promoted as a tool that guarantees security and justice, within an imaginary of techno-optimism fed by public institutions and the media, it becomes difficult to assess to what extent it may fail its promise. Likewise, it is also complex to analyse the extent to which electronic monitoring of victims can contribute to narratives that contribute to blaming victims in judicial contexts. Those responsible for the Directorate-General for Reinsertion and Prison Services express an example in their statements. Following the murder of a domestic violence victim, such statements were widely disseminated by the media under the electronic monitoring geolocation system in 2017. After the murder, several news headlines highlighted the need for victims to wear the protection unit device at all times:

Authorities warn victims of domestic violence. They should always use monitoring devices. Warning arrives after a couple has been found dead inside a car. He had an electronic bracelet and the woman a device that warned the authorities if the aggressor approached, but she did not take the device to the meeting (TVI 24). (*Autoridades Deixam Alerta a Vítimas de Violência Doméstica*, 2017, para. 1)

According to the Directorate-General, although they are not “judicially” obliged to use such equipment, victims of domestic violence must do so for “personal protection”, which “did not happen” to the woman who was found dead on Wednesday inside a car in Vila Nova de Gaia. (...) In an interview with Lusa, João Moreira, Director of Organization, Planning and External Relations Services at the Directorate-General for Reinsertion and Prison Services, pointed out that no victim of domestic violence is obliged by justice to use the Victim Protection Unit (VPU) device, but should do it for the “preservation of life”. “Although there is no legal obligation to force the victim to use the device, the victim must carry the device”, reiterated João Moreira, admitting that the case of the woman who turned up dead last Wednesday inside a car could have had another outcome if she had the device with her. (Lusa, 2017, paras. 2–10)

Therefore, it is clear how a system designed to protect victims ends up making them co-responsible for their safety and, ultimately, for the preservation of their own lives. Considering the high complexity of situations of domestic violence (Casimiro, 2002; Dias, 2010) as well as victims’ low trust in the criminal justice system, there is an urgent need to re-imagine prevention efforts that do not rely solely on monitoring technologies that hold victims accountable for their safety. Understanding how techno-optimism about electronic monitoring is produced and maintained opens the possibility of recognising and questioning the consequences of that optimism for victims of domestic violence and stalking and their communities. Techno-optimism restricts collective criticism and opposition to the potential negative consequences of electronic monitoring on victims and

undermines collective capacities to imagine alternative solutions to domestic violence (Quinlan, 2020; Morozov, 2013). More broadly, techno-optimism also narrows public dialogue about preventing violence rather than promoting debates about the social and cultural roots of violence and the reform of the criminal justice system.

6. CONCLUSION

Returning to the brief interaction with a prisoner who had been under electronic monitoring that I mentioned at the beginning of this article, I now understand that the techno-optimism that has been marking the dominant discourse on electronic monitoring also influenced my reaction, as well as and more importantly, obliterates collective criticism of the invisible implications of electronic monitoring. Although electronic monitoring can effectively reduce the prison population, facilitate the maintenance of social ties, and protect victims of domestic violence, within the scope of this article, I attempted to analyse how these effects can coexist with other implications that tend to be made invisible by the techno-optimism that frames this penal instrument in Portugal. More particularly, how this techno-optimism restricts a critical perspective on how electronic monitoring expands the penal network, co-opts the family in the penal sphere and transmutes the domestic space into a space of confinement, as well as narrows the debate on domestic violence, contributing, even if unintentionally, for the co-responsibilisation of victims.

Imbued in discourses disseminated not only by official institutions but also by the media and by an effervescent surveillance industry, the techno-optimism surrounding electronic monitoring, therefore, ends up restricting public debates on the reform of the criminal justice and the penal system to the domain of technoscience, rather than opening dialogues about the social and cultural roots of these phenomena (see also Quinlan, 2020). According to Ruha Benjamin (2019), an author who reflects on how racism and social inequalities are embedded in artefacts and technological mechanisms in a socially invisible way, electronic monitoring is, therefore, an example of “technological benevolence”. In other words, a technology legitimised by managerialism and economist arguments that aim to solve complex social and penal problems without looking deeply at their systemic roots, impossible to solve only with technological artefacts.

Translation: Rafaela Granja

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