



Butlletí d'informació sobre l'audiovisual a Catalunya

(Newsletter on the Media Sector in Catalonia)

**Note. Uses and perceptions
of the audiovisual media**

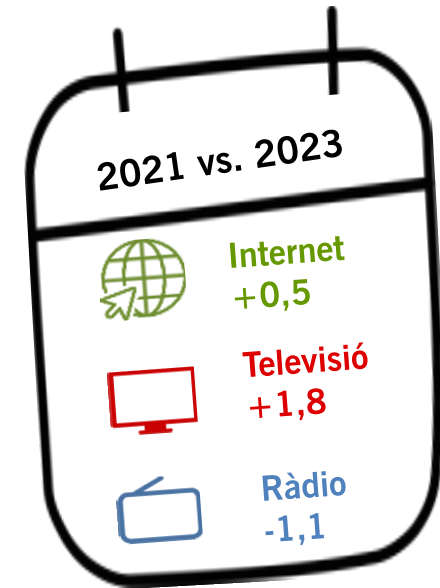
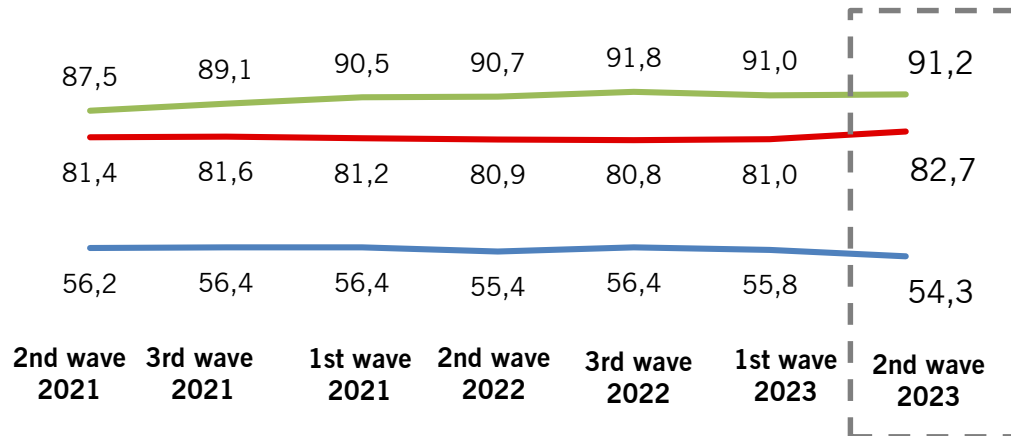
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Audiovisual penetration in Catalonia (1)

Stability in the media penetration scales in Catalonia. Internet is the medium with the highest penetration (91.2%), followed by TV, which rose slightly in the past year (+1.8%). Compared to the previous edition, the amount of time spent listening to the radio dropped (-2 minutes), as did the time spent on TV consumption (-8 minutes).

Audiovisual penetration in Catalonia by medium. Period 2021-2023 (in %)



Radio consumption

1 h 40 minutes/day (from Monday to Friday)
1 h 33 minutes/day (from Monday to Sunday)



TV consumption

2 h 35 minutes/day

Note: *Penetration* means the % of audience in each medium over the total population. The figures on the Internet refer to connections, regardless of use. The periods: radio (Monday-Sunday); television and Internet (audience the day before the interview).

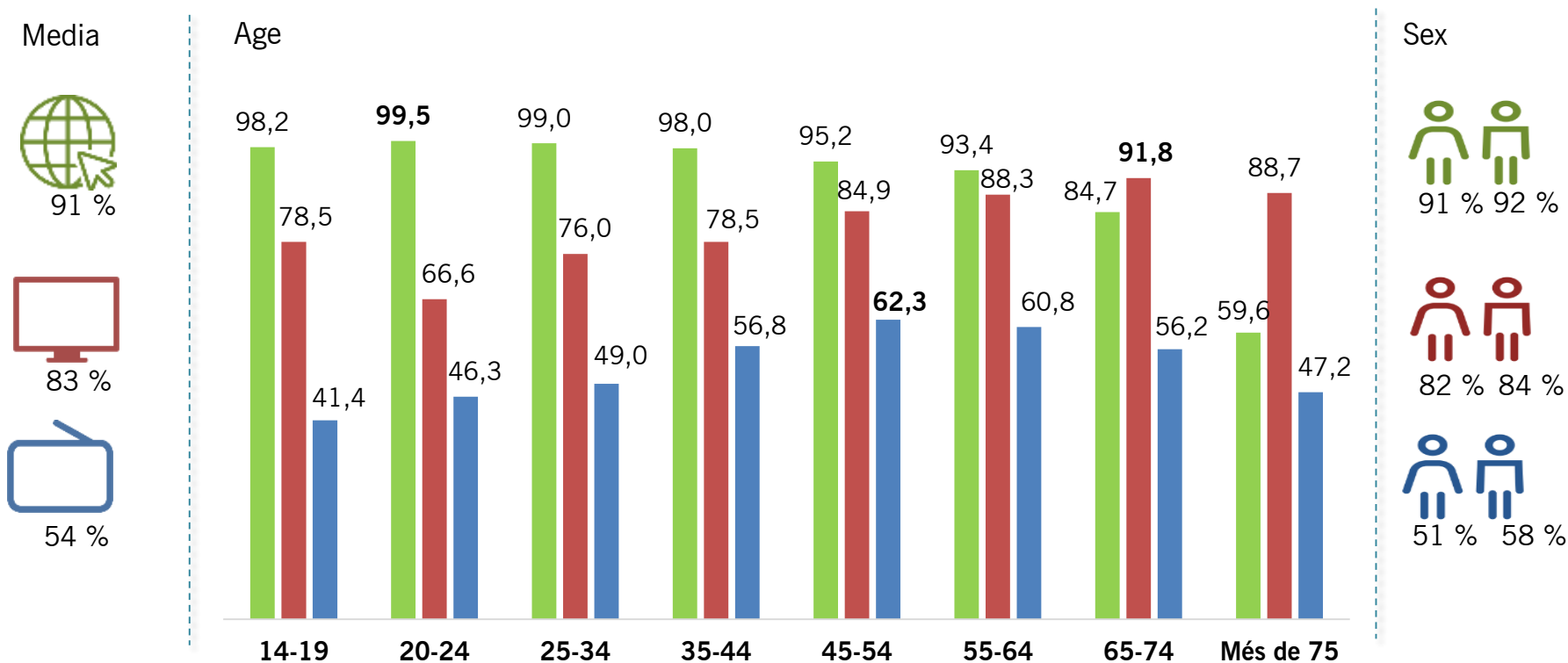
Source: EGM – Figures for Catalonia – 1st wave 2023 (Figures on radio penetration and consumption) and Barlovento Comunicación (TV consumption).



Audiovisual penetration in Catalonia (and 2)

Internet penetration is in the majority in all age brackets except the 65 and older group, where it is no longer the first choice in favour of TV. Radio continues to gain ground in the 45-64 age bracket.

Audiovisual penetration by age and sex. Catalonia. Second wave 2023 (in %)



Source: EGM – Figures for Catalonia – 2nd wave 2023.



Breakdown of DTT in Catalonia

TV channel private TV public TV



Catalan households receive an average of 35 open-access television channels: 8 national, 26 state and the local channels.

80 traditional open-access linear television channels

7 out of every 10 television channels are **private** and half of them broadcast **locally**.

8 national channels



4 public
4 private

26 state channels



5 public
21 private

46 local channels



11 public
35 private

Note: Within the BIAC, DTT *programs* (technical and administrative term) issued by each multiplex (MUX) are called *channels* (the usual term). The television channels that broadcast in simulcast in high-definition (TV3, Barça TV, La 1, Clan, Teleduarte, Antena 3, laSexta, Telecinco and Cuatro) are only counted once.

Source: CAC (national and local DTT channels) and Ministry of Economic Affairs and Digital Transformation (state DTT channels). September 2023.



Catalan DTT channels

Public TV Commercial TV language used

By owner, offer and language used

Catalan

8 channels	4 Public channels	Catalan Audiovisual Media Corporation (CCMA) 
	4 ^A Commercial channels	

A In August the lender EDICA, which has a private national MUX licence, started bankruptcy proceedings after the pre-bankruptcy phase that began on 30 May 2023 was over.

B The programming on the 8tv channel is broadcast by programmes 1 and 4 of the private national MUX. The broadcast of the 8tv channel by programme number 4 is temporary. This place used to be occupied by the Fibracat TV channel, which stopped broadcasting on 1 January 2023.

C The Barça TV channel stopped broadcasting on 1 July 2023.

Source: Catalan Audiovisual Council. September 2023.



Spanish DTT channels

Public TV Commercial TV language used

By owner, offer and language used

Spanish

26 channels	5 Public channels	Spanish Radio and Television Corporation (CRTVE) 1 2 24h clan tdp				
	21 Commercial channels	Atresmedia Televisión      	Mediaset España       	SQUIRREL MEDIA   UNIDAD EDITORIAL  	ÁBSIDE MEDIA  Real Madrid Televisión  	SECUOYA  KISS MEDIA 

Note: The provider CRTVE broadcasts contents in Catalan for Catalonia via the channels La 1, La 2 and Canal 24 Horas.
 Source: Catalan Audiovisual Council and corporate websites of the audiovisual communication service providers. September 2023.



Local DTT channels (1)

■ public TV
 ■ commercial TV
 ca language used

By owner, offer and language used

ca Catalan

46 channels	11 Public channels	          					
	35 Commercial channels	Grup 4 (2)  Ebre (1)  Segre (4)   Corisa Media Grup (2)   Taelus (4)   CB Global Media (1)  ETV (4)  Prosa (1)  Cadena Pirenaica RTV (2)   Doble Columna (1)  Mola (1)             					












Note: The private channels are grouped together by communication groups, if applicable.

Source: Catalan Audiovisual Council. September 2023.



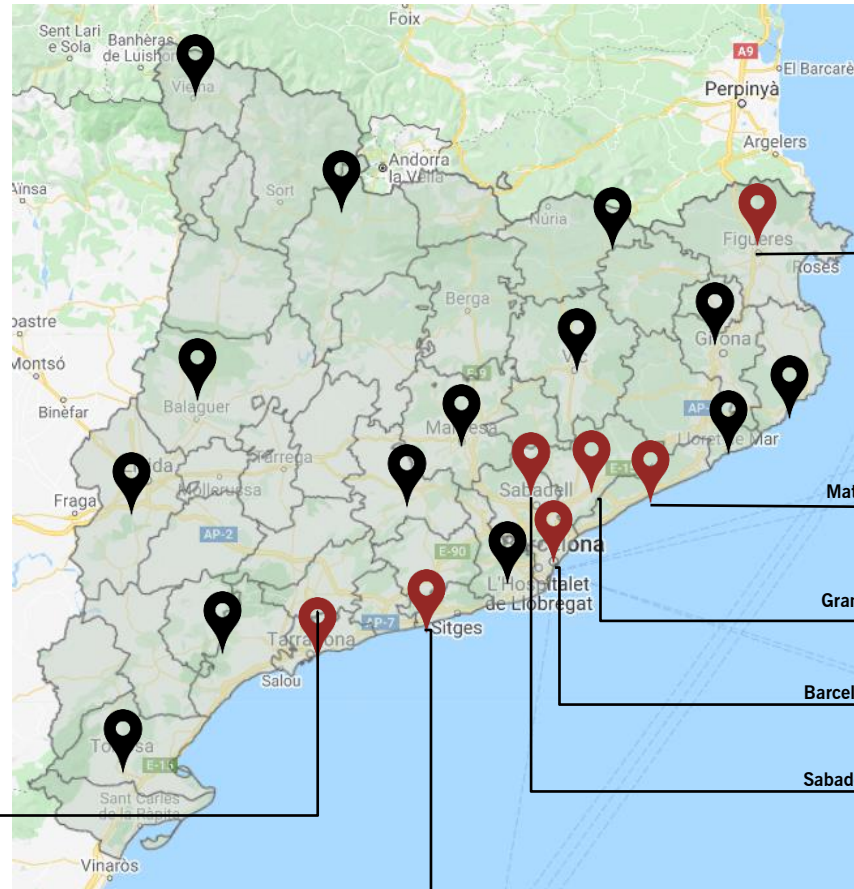
Local DTT channels (2)

11 local public DTT channels distributed in 7 DTT district

 DTT demarcations without public television.

 DTT demarcations with public television (1 or more).

demarcation →



Figueres



Mataró

Granollers



Barcelona



Sabadell



Tarragona



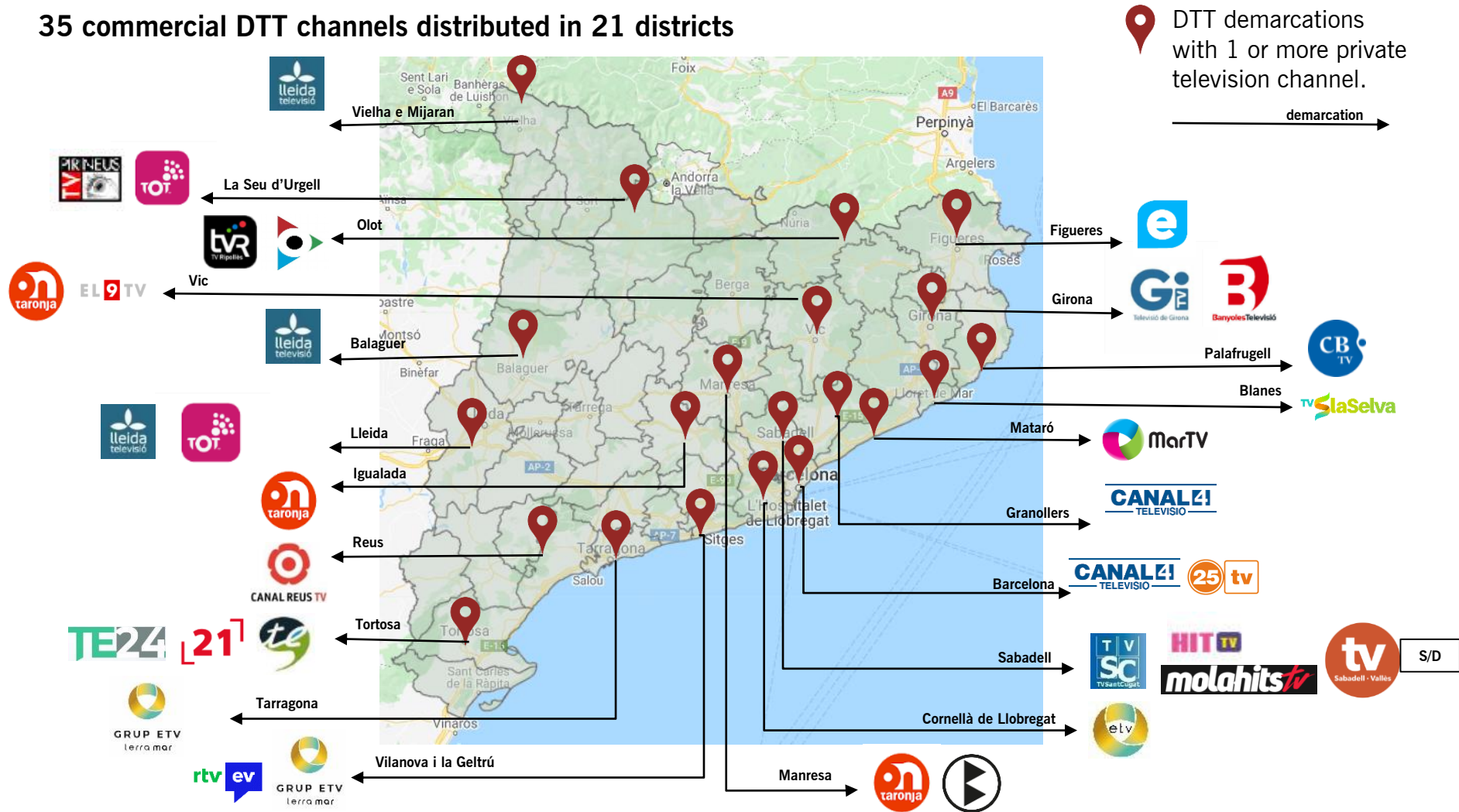
Vilanova i la Geltrú

Source: Catalan Audiovisual Council. September 2023.



Local DTT channels (and 3)

35 commercial DTT channels distributed in 21 districts

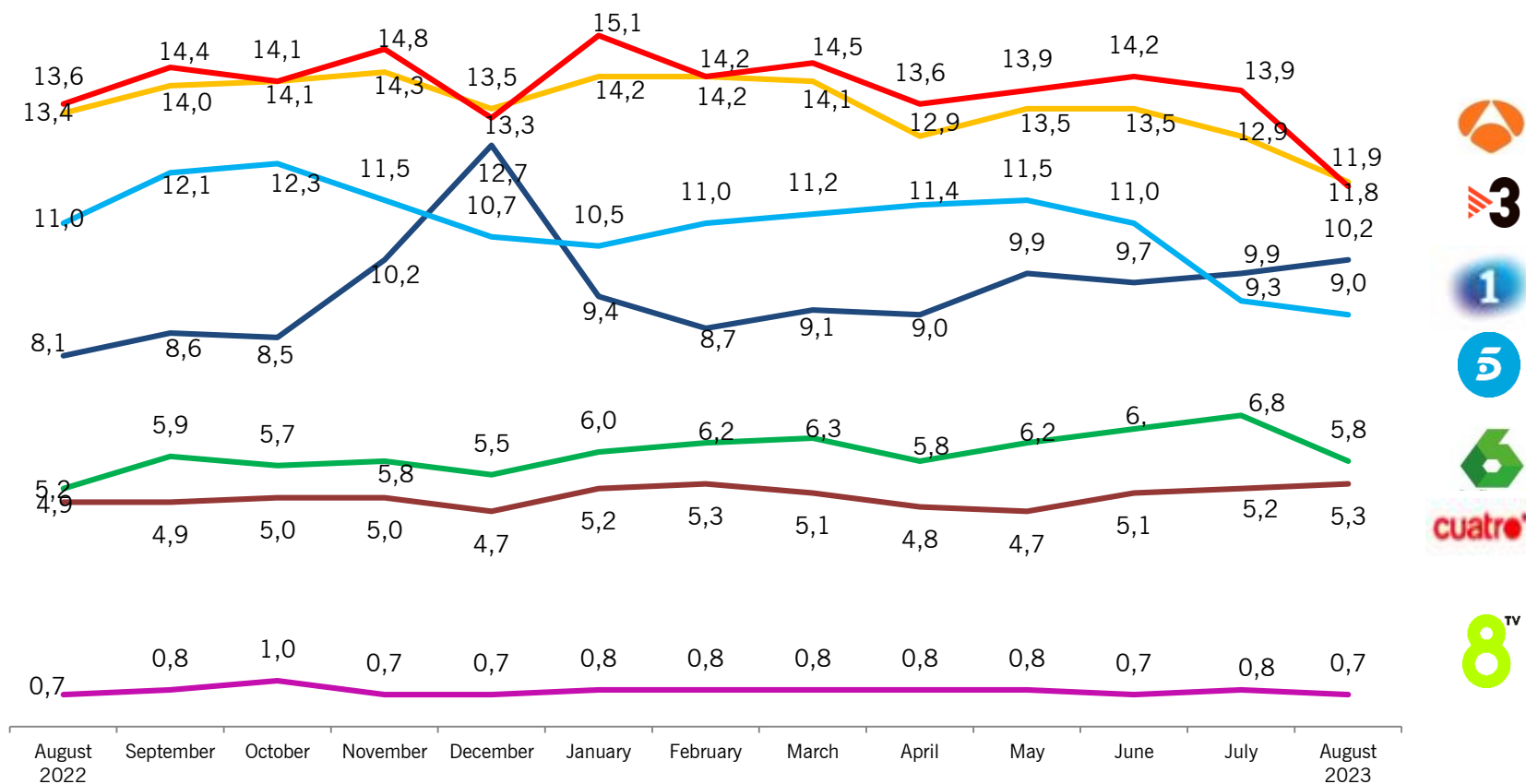


Source: Catalan Audiovisual Council. September 2023.



DTT audiences (1)

Monthly evolution of the screen share of the leading television channels in Spain (in %, from August 2022 to August 2023)



Source: Barlovento Comunicación.



DTT audiences (and 2)

Monthly evolution of the screen share of television in Spain. January-August 2023 (in % and in descending order figures for August)

Channel	January	February	March	April	May	June	July	August
Antena 3 TV	14.2	14.2	14.1	12.9	13.5	13.5	12.9	11.9
TV3	15.1	14.2	14.5	13.6	13.9	14.2	13.9	11.8
La1	9.4	8.7	9.1	9.0	9.9	9.7	9.9	10.2
Telecinco	10.5	11.0	11.2	11.4	11.5	11.0	9.3	9.0
laSexta	6.0	6.2	6.2	5.8	6.2	6.5	6.8	5.8
Cuatro	5.2	5.3	5.1	4.8	4.7	5.1	5.2	5.3
La2	2.9	2.8	2.7	2.6	2.8	2.8	3.1	3.2
Energy	3.0	3.0	3.1	3.1	3.1	3.0	3.0	3.1
FDF	2.4	2.5	2.6	2.5	2.6	2.5	2.6	2.7
Divinity	2.2	2.4	2.4	2.4	2.2	2.3	2.1	2.2
Nova	2.0	2.0	1.9	2.1	2.1	2.3	2.1	2.2
Neox	2.0	2.0	2.0	2.0	1.9	2.0	2.0	2.1
TRECE	2.2	2.0	2.0	2.0	2.0	2.0	2.0	2.1
Atreseries	1.7	1.8	1.6	1.6	1.4	1.7	1.8	2.0
Dmax	1.6	1.6	1.6	1.6	1.5	1.6	1.7	1.8
MEGA	1.2	1.3	1.3	1.4	1.5	1.5	1.6	1.7
BeMad	1.1	1.2	1.1	1.3	1.4	1.4	1.4	1.6
Paramount Network	1.2	1.2	1.3	1.3	1.3	1.4	1.4	1.5
3/24	3.6	1.2	1.1	1.1	1.2	1.3	1.5	1.5
DKISS	1.1	1.2	1.1	1.1	1.1	1.3	1.2	1.3
Gol Play	0.9	1.0	0.9	1.0	1.0	0.8	0.8	1.2
24h	1.0	0.9	1.1	1.0	1.0	1.1	1.3	1.2
Teledeporte	0.6	0.4	0.5	0.8	0.7	0.6	1.3	1.2
TEN	0.7	0.7	0.8	0.8	0.8	0.8	0.9	1.0
Esport3	0.9	0.9	0.9	1.0	1.0	0.9	0.6	1.0
Clan	0.9	0.9	0.9	0.9	0.9	0.9	0.9	1.0
Boing	0.8	0.9	0.8	1.0	0.8	0.9	0.8	0.9
SX3/33	0.5	0.6	0.6	0.6	0.6	0.6	0.5	0.8
8tv	0.8	0.8	0.8	0.8	0.8	0.7	0.8	0.7
Disney Channel	0.7	0.6	0.6	0.7	0.7	0.7	0.7	0.7
Real Madrid HD	0.5	0.5	0.5	0.6	0.5	0.6	0.6	0.5
BOM Cine	0.4	0.4	0.4	0.4	0.4	0.3	0.4	0.3
Verdi Classics	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1

Source: Barlovento Comunicación.



Subscriptions to IPTV platforms

Subscriptions to the leading conventional-pay IPTV platforms in Catalonia. April-May 2023

IPTV	HOUSEHOLDS 		SUBSCRIBERS 		
					Variation vs. 1st wave 2023
	678,024	21.9 %	1,671,520	24.8 %	+12.5 %
	179,568	5.8 %	471,800	7.0 %	+10.0 %
	117,648	3.8 %	256,120	3.8 %	-39.5 %

Movistar+ continues to lead the IPTV platforms, with more than 1.5 million subscribers, and the number of subscriptions rose 12.5% compared to the previous edition.

Orange TV has recovered from its slump in early 2023 and remains the second most popular IPTV in Catalonia, with almost 500,000 subscribers.

Worth noting is **Vodafone's slump**, which dropped 39.5% in a six-month period.

Note: There may be multiple responses, because a single household or person may have more than one subscription to the pay platforms, either IPTV or OTT.

Source: EGM – Figures for Catalonia – 2nd wave of 2023. Base: 3,096,000 households and 6,740,000 subscribers.



Subscriptions to OTT services

Subscriptions to the leading paid OTT service platforms in Catalonia. April-May 2023

PLATAFORMAS	HOUSEHOLDS 		SUBSCRIBERS 		
					Variation vs. 1st wave '23
NETFLIX	1,606,824	51.9 %	3,835,060	56.9 %	+1.6 %
prime video	1,195,056	38.6 %	2,857,760	42.4 %	+1.2 %
HBOmax	662,544	21.4 %	1,476,060	21.9 %	-6.4 %
Disney+	643,968	20.8 %	1,442,360	21.4 %	-4.2 %
DAZN	238,392	7.7 %	532,460	7.9 %	+3.8 %
FILMIN	139,320	4.5 %	269,600	4.0 %	+5.0 %
Rakuten TV	92,880	3.0 %	168,500	2.5 %	-28.0 %
Other suppliers	575,856	18.6 %	1,321,040	19.6 %	+11.7 %

Netflix continues to dominate the OTT market in Catalonia, with almost 4 million subscribers (56.9%), ahead of **Prime Video**, which has almost 3 million subscribers (42.4 %).

HBO Max and **Disney+** are losing subscribers but remain in third and fourth place, with 21.9% and 21.4% of the market, respectively.

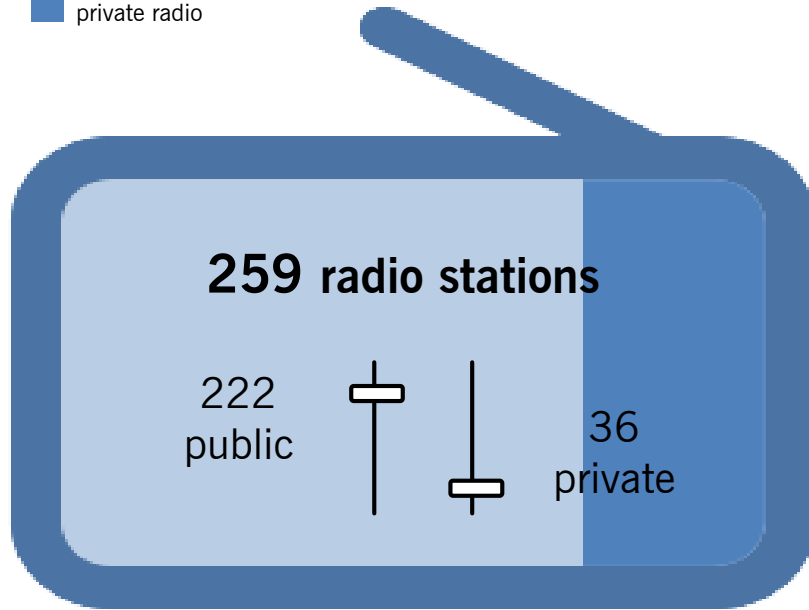
The Spanish platform **Filmin** showed the steepest growth in the period and now has 4% of the share, compared to **Rakuten TV**, which has fewer subscribers.

Source: EGM – Figures for Catalonia – 2nd wave 2023. Base: 3,096,000 households and 6,740,000 subscribers.



Breakdown of radio stations in Catalonia

public radio
private radio



Catalan households receive an average of more than 30 broadcasters: 12 national radio channels, 19 state channels and the local channels.

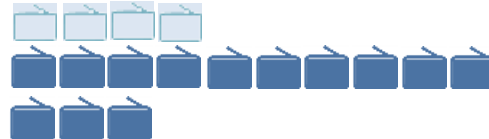
12 **national** broadcasters

5 public
7 private



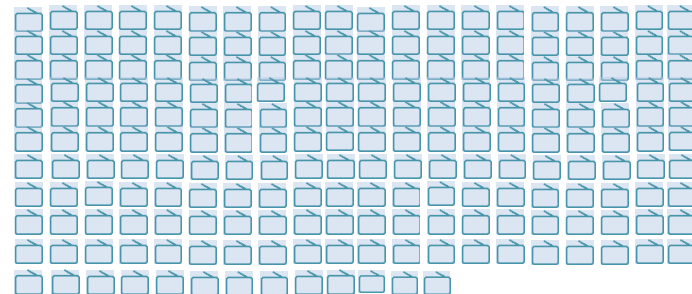
17 **state** broadcasters

4 public
13 private



230 **local** broadcasters

213 public



16 private



Note: In the BIAC, *radio station* means the media that offers radiophonic programming, and *broadcaster* refers to a group of stations that broadcast content from a centralized source.

Source: CAC (local FM), CCMA (national FM) and Ministry of Economic Affairs and Digital Transformation (public state FM). September 2023.



Catalan FM broadcasters

Radio networks broadcasting exclusively for Catalonia. By ownership, language spoken and number of FM frequencies

12 broadcasters	5 public broadcasters	CCMA			CRTVE	 Catalan	
	216 FM frequencies	 catalunya informació  Cat 					
	7 private broadcasters	FLAIX			GODÓ	PRISA	 Catalan
	96 FM frequencies	 			 		
		ESTEL			TELE TAXI		
							

Note: One broadcaster may have more than one FM frequency.

Source: CAC (frequencies of private broadcasters), CCMA (CCMA frequencies) and RTVE (Ràdio 4 frequencies). September 2023.



Spanish FM broadcasters

Radio networks broadcasting in Spain with disconnections in Catalonia. By ownership, language spoken and number of FM frequencies

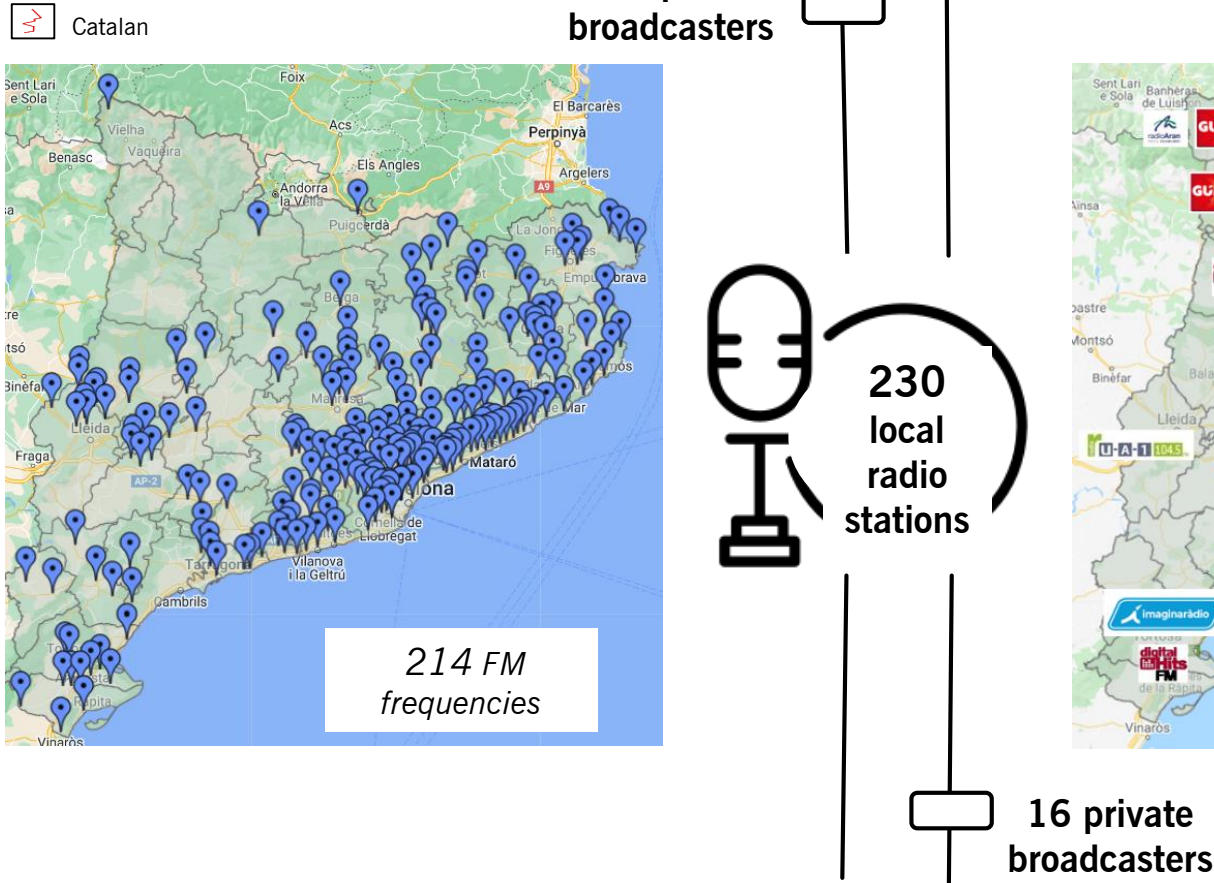
17 broadcasters	4 public broadcasters	CRTVE (Corporación de Radio y Televisión Española)  Spanish	
	83 FM frequencies	   	
17 broadcasters	13 private broadcasters	       Spanish (except for local broadcasts)	
	65 FM frequencies	           	

Source: CAC (frequencies of private broadcasters), Ministry of Economic Affairs and Digital Transformation (CRTVE broadcast frequencies). September 2023.



Local FM broadcasters

Local broadcasters in Catalonia. By ownership and language spoken

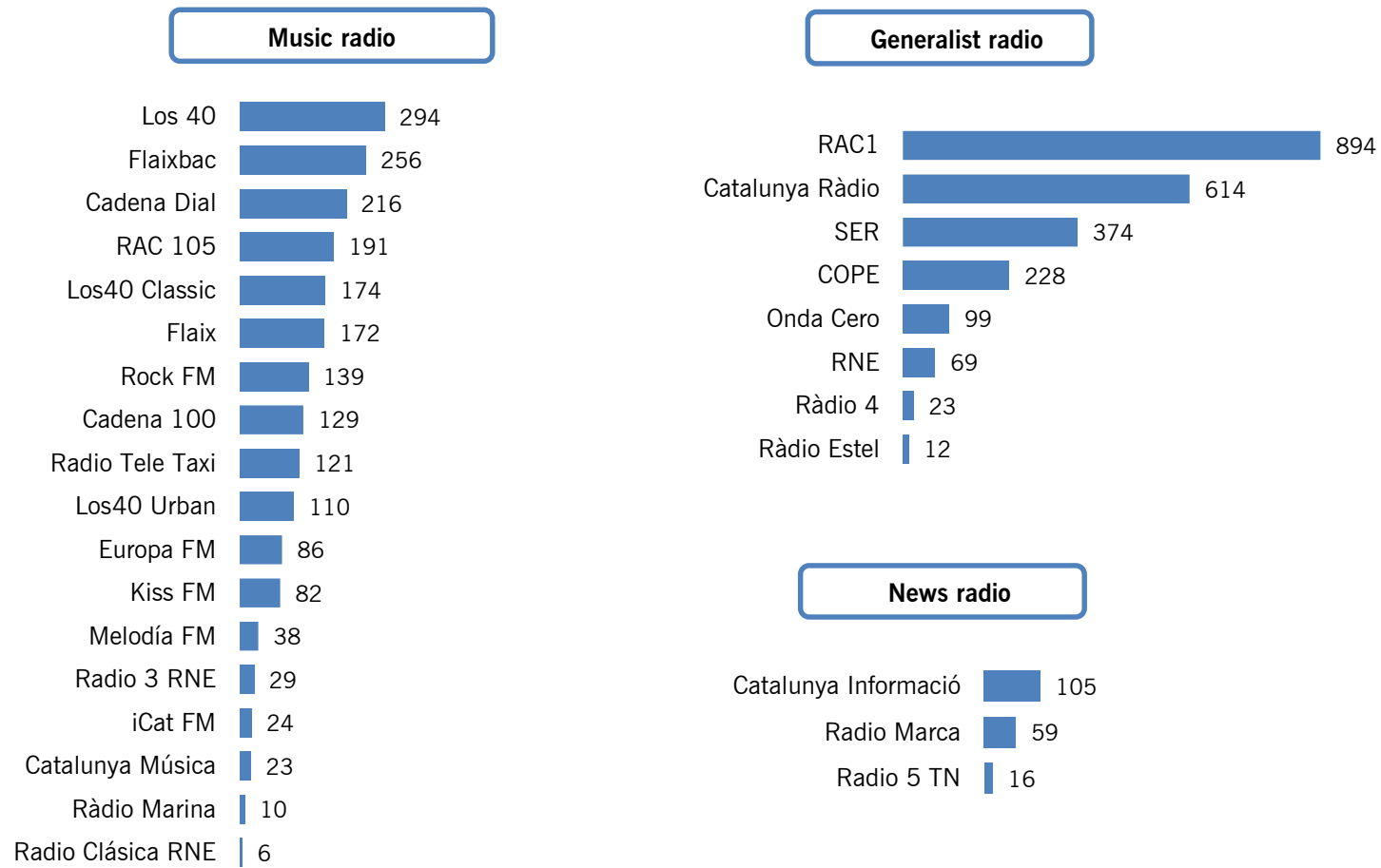


Source: CAC and corporate websites. September 2023.



Radio audiences (1)

Daily accumulated radio audience in Catalonia, by type of radio (in thousands, Monday to Friday)

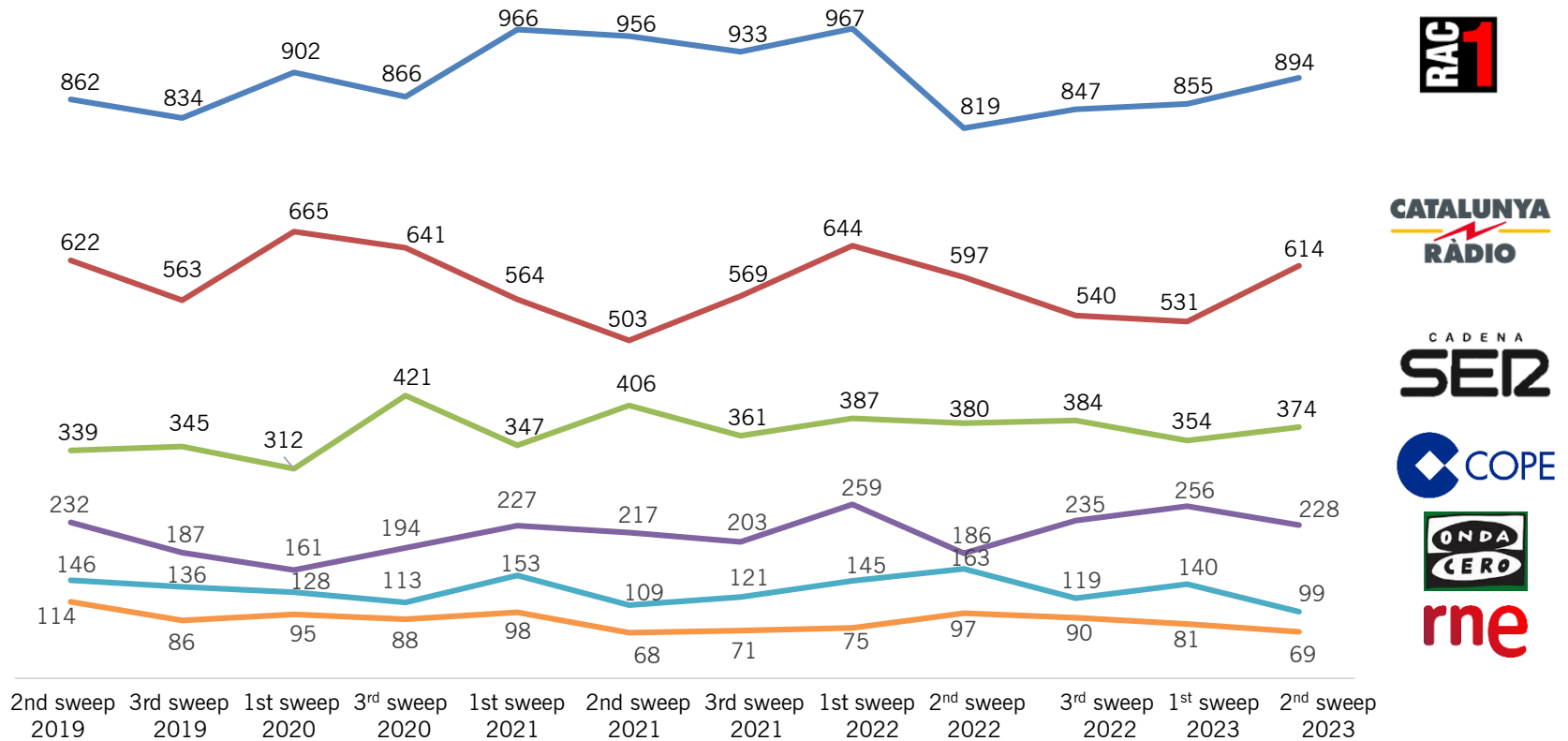


Source: EGM – Figures for Catalonia. 2nd wave of 2023.



Radio audiences (2)

Ranking of generalist radio stations in Catalonia. Period: 2nd wave 2019 – 2nd wave 2023 (Monday to Friday, in thousands)



Source: EGM – Figures for Catalonia – 1nd wave of 2023. Note: EGM did not conduct the second wave in 2020 due to the pandemic.



Radio audiences (3)

Audience of leading generalist radio stations by time brackets in Catalonia. 2nd wave 2023 (Monday to Friday, in thousands)

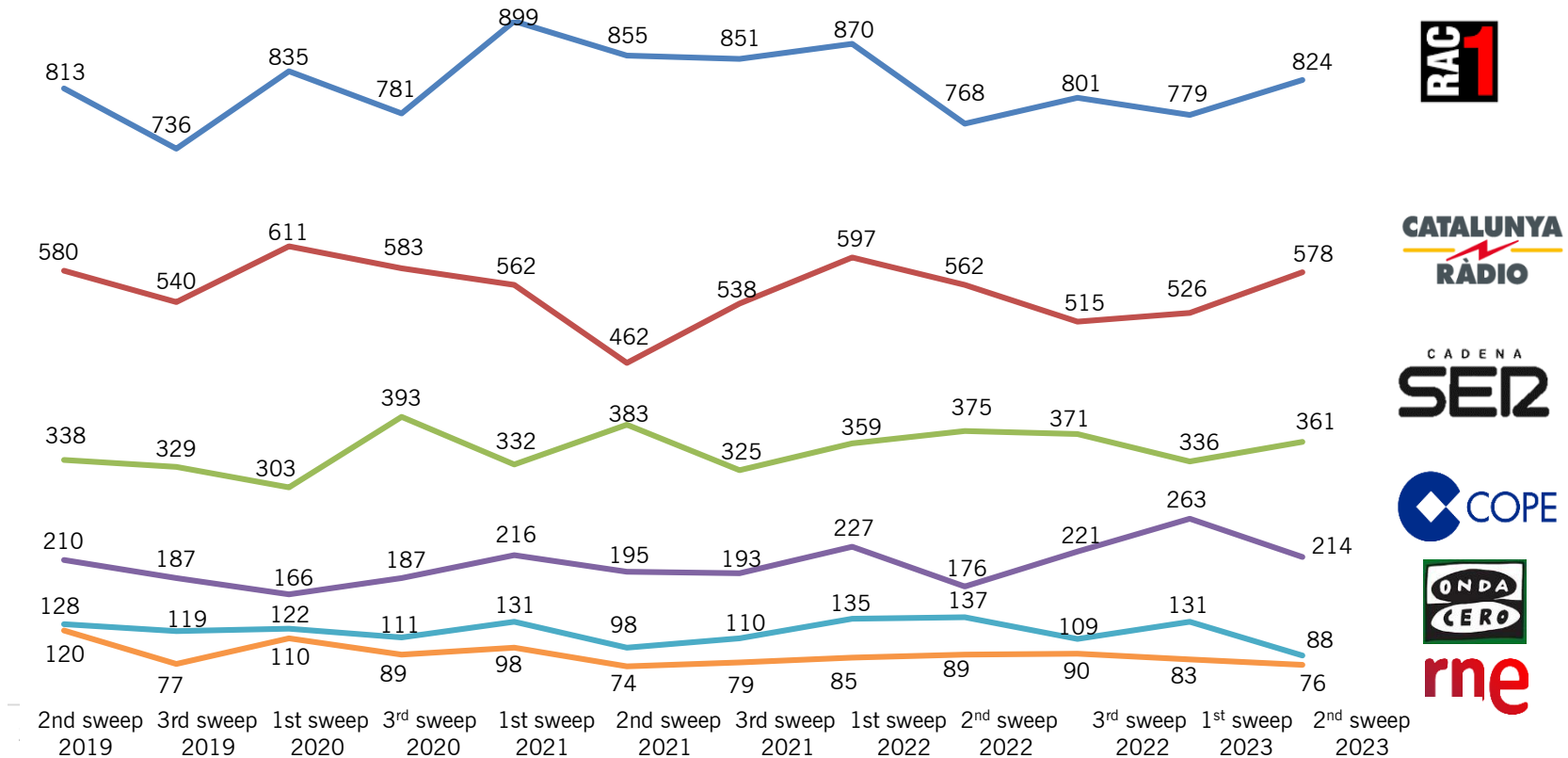
	Total audience	6 am to 12 noon	12 noon to 4 pm	4 pm to 8 pm	8 pm to 6 am
	894	711	325	275	201
	614	397	180	138	173
	374	241	116	94	126
	228	148	36	47	125
	99	65	28	35	14
	69	51	26	11	26

Source: EGM – Figures for Catalonia – 2nd wave of 2023.



Radio audiences (4)

Ranking of generalist radio stations in Catalonia. Period: 2nd wave 2019 – 2nd wave 2023 (Monday to Sunday, in thousands)

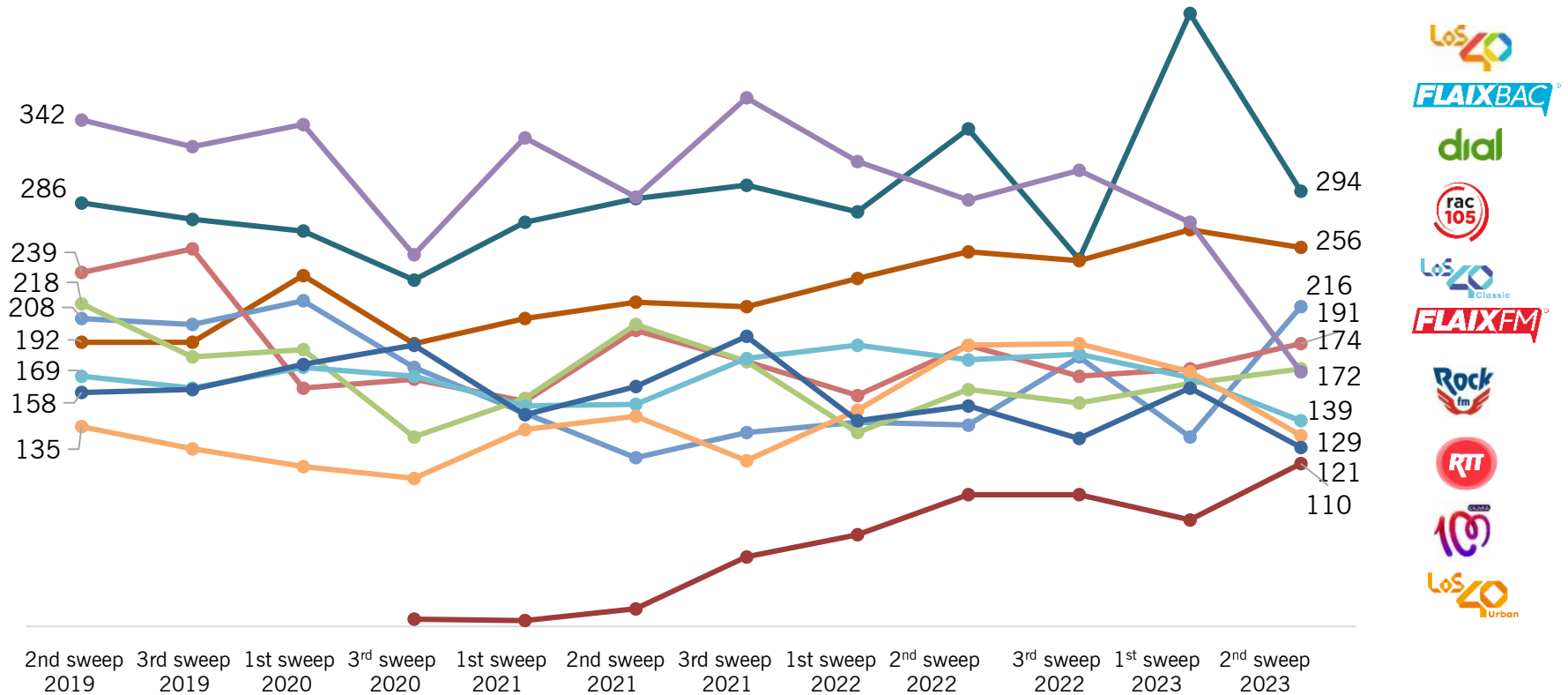


Source: EGM – Figures for Catalonia – 2nd wave of 2023. Note: EGM did not conduct the second wave in 2020 due to the pandemic.



Radio audiences (5)

Ranking of music radio stations. Period: 2nd wave 2019 – 2nd wave 2023 (Monday to Friday, in thousands)

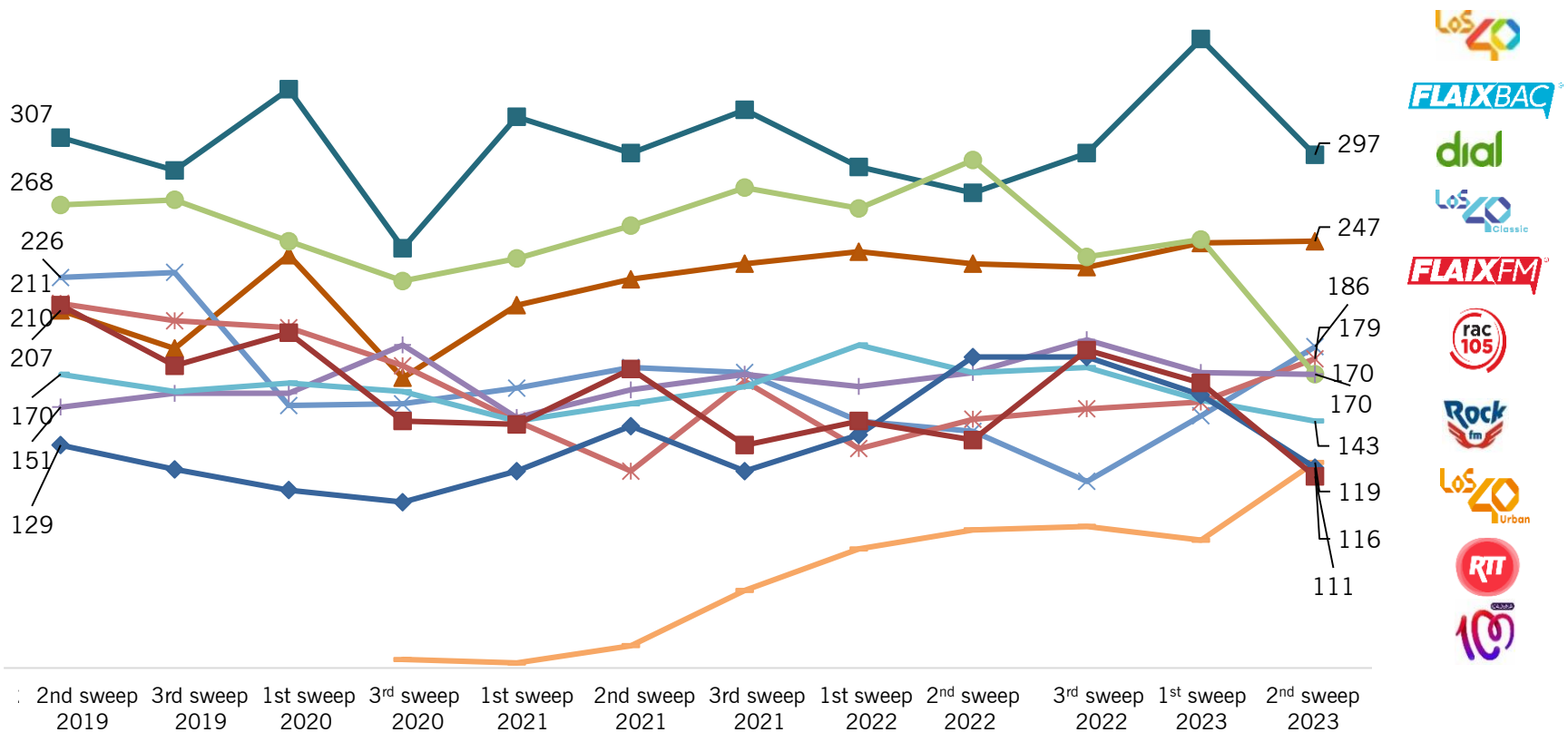


Source: EGM – Figures for Catalonia – 2nd wave of 2023. Note: EGM did not conduct the second wave in 2020 due to the pandemic.



Radio audiences (and 6)

Ranking of music radio stations. Period: 2nd wave 2019 – 2nd wave 2023 (Monday to Sunday, in thousands)



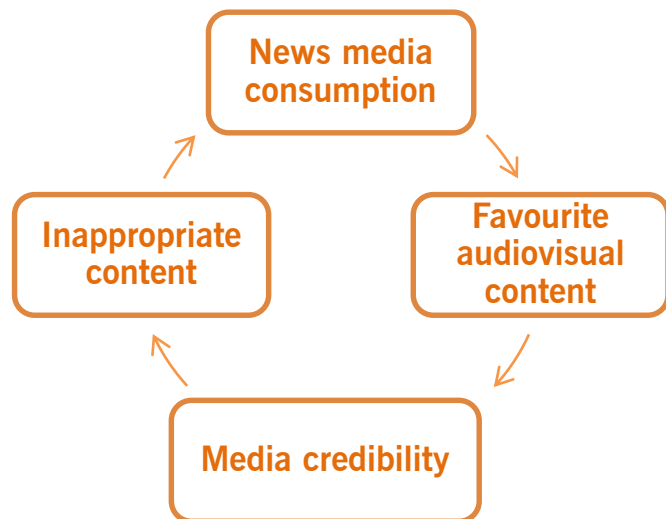
Source: EGM – Figures for Catalonia – 2nd wave of 2023. Note: EGM did not conduct the second wave in 2020 due to the pandemic.



Note: Uses and perceptions of the audiovisual media

This report presents the results of the latest [Omnibus of the Government of Catalonia \(2023-2\)](#) on the opinions of citizens of Catalonia on the **media and the information society** in general.

The Omnibus is a broader opinion study about issues of interest—such as territory, economy, security, education and health, among others—that is drawn up by the [Centre of Opinion Studies](#), the Government of Catalonia's benchmark opinion studies organisation.



Technical info

Sample:

2,564 people aged 16 and older.

Area:

Catalonia

Methodology:

Quantitative. Self-administered questionnaire
(*push-to-web* + paper)

Fieldwork:

From 2 May to 4 July 2023

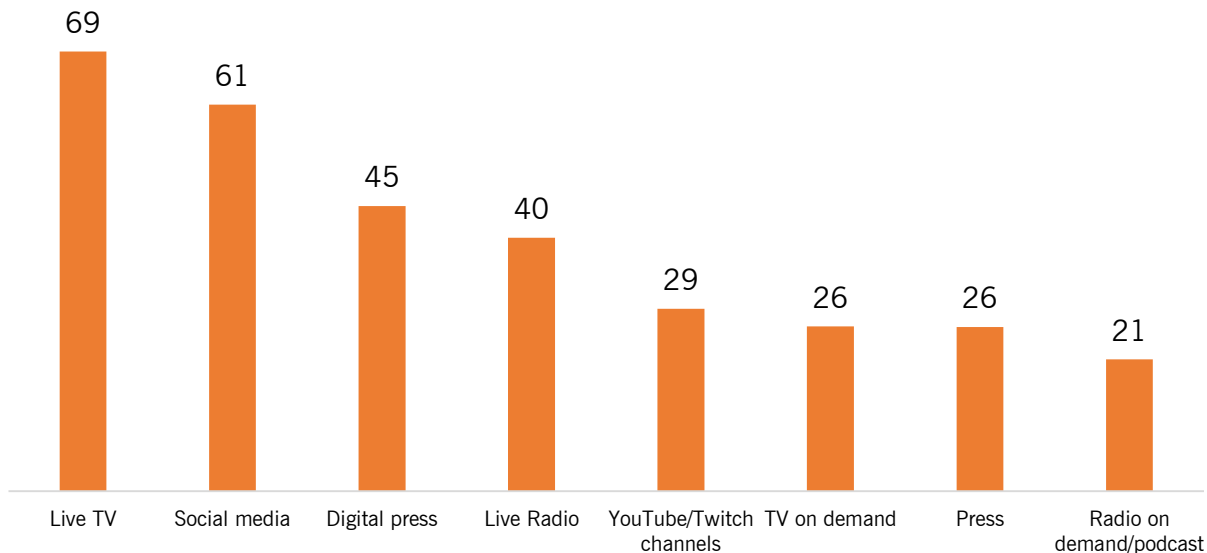


Note: How do we get our news?

Live TV and the **social media** are the **two main media** chosen by citizens **to get their news** (with almost 70% and 61%, respectively).

By age, the youngest brackets (16 to 34) primarily get their news via the **social media**, while the older age brackets prefer **live TV** (people between 50 and 65).

On any given day, what media do you use to get the news? (in %)



In **Europe**, **TV** is still the leading way to get the news (75%), while online platforms (digital media) and radio are in second and third place, with 43% and 39%, respectively.

Even though there is notable **growth** in the **social media** in many European countries, youths are the heaviest consumers of digital news.

Source: Data for Catalonia: Centre of Opinion Studies. [Omnibus of the Government of Catalonia. 2023-2](#). September 2023. Data for Spain and Europe: [Eurobarometer Media News and Survey 2022](#).

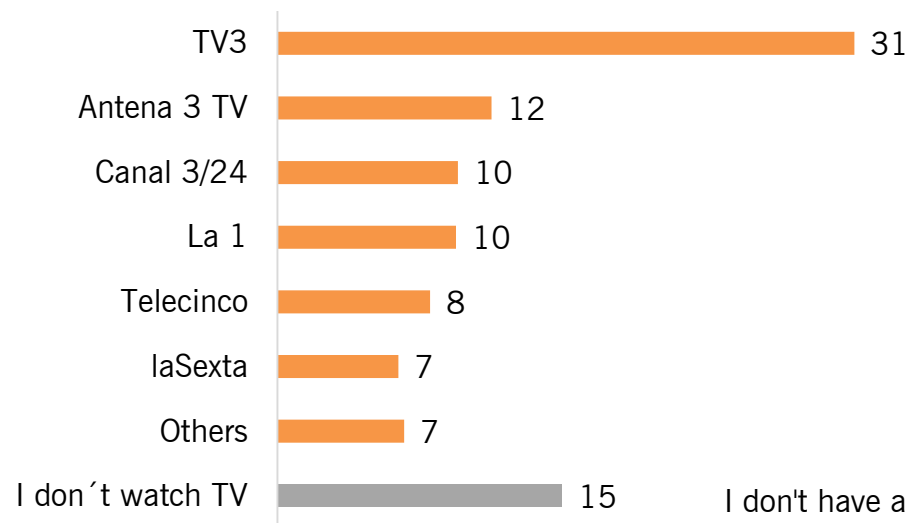


Note: Usual TV channel for the news

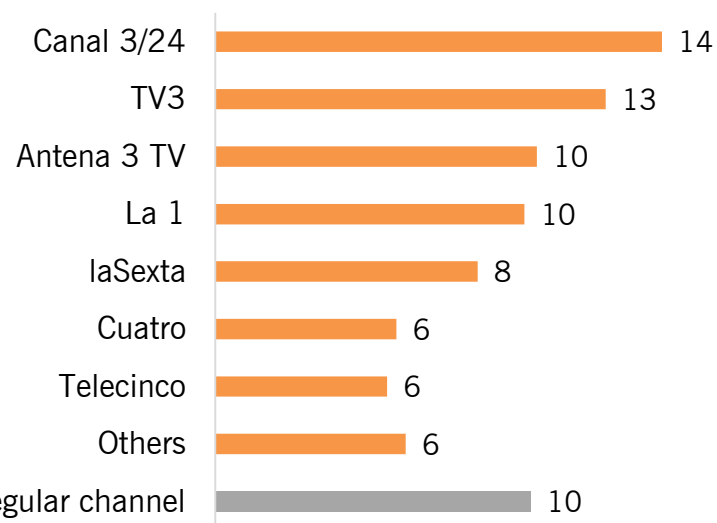
TV3 is the channel where the most Catalan citizens get the news, followed at a distance by Antena 3 and the 3/24 channel.

When asked about the **second most frequent channel** where they get the news, citizens chose the **3/24 news channel**.

What TV channel or audiovisual to you watch the most to get the news? (In %)



What other channel or audiovisual do you watch the most to get the news? (In %)



Source: Centre of Opinion Studies. [Omnibus of the Government of Catalonia. 2023-2](#). September 2023.



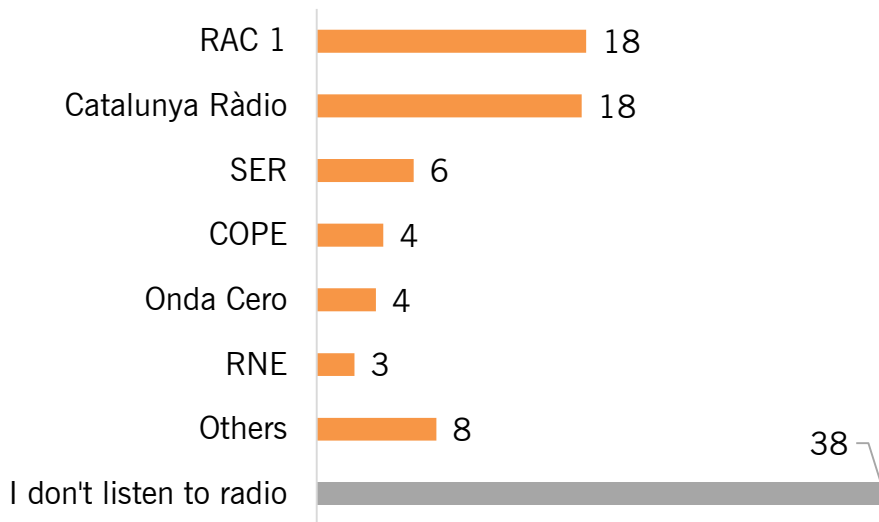
Note: Usual radio station for the news

6 out of 10 survey respondents **listen to the radio to get the news.**

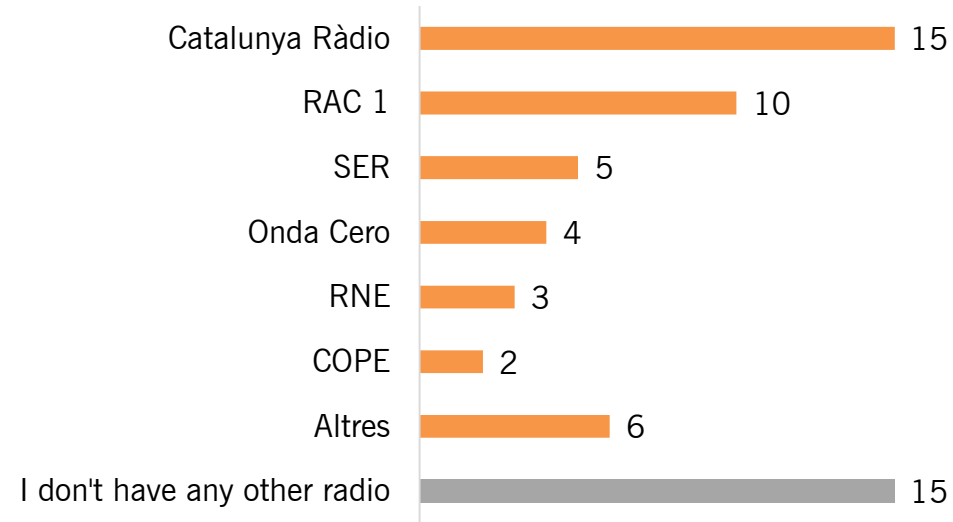
Catalunya Ràdio and **RAC1** are the stations with the largest audience in both first and second choices, while the Spanish station SER comes in a distant third.

37.5% of the survey respondents **do not listen to the radio to get the news.**

*What radio station to you listen to the most to get the news?
(In %)*



*And what other radio station to you listen to the most to
get the news? (In %)*



Source: Centre of Opinion Studies. [Omnibus of the Government of Catalonia. 2023-2](#). September 2023.



Note: Consumption of audiovisual contents by type

Series and films are the **audiovisual contents watched the most** on the TV or internet by Catalan citizens as a whole (35%). Lagging far behind them is news (19%), although this percentage is higher among older people. The favourite contents of young people are sports and sports news.

What type of audiovisual content do you watch the most on the TV or internet? (In %)



In Europe, **one out of every three people has often avoided the news** (36%), a trend that has risen 5% compared to 2017. The percentage in Spain is 29%.

The **topics** that people tend to avoid are those **that are repeated a lot and are emotionally exhausting**, like the war in Ukraine, climate change and political debates, among others.

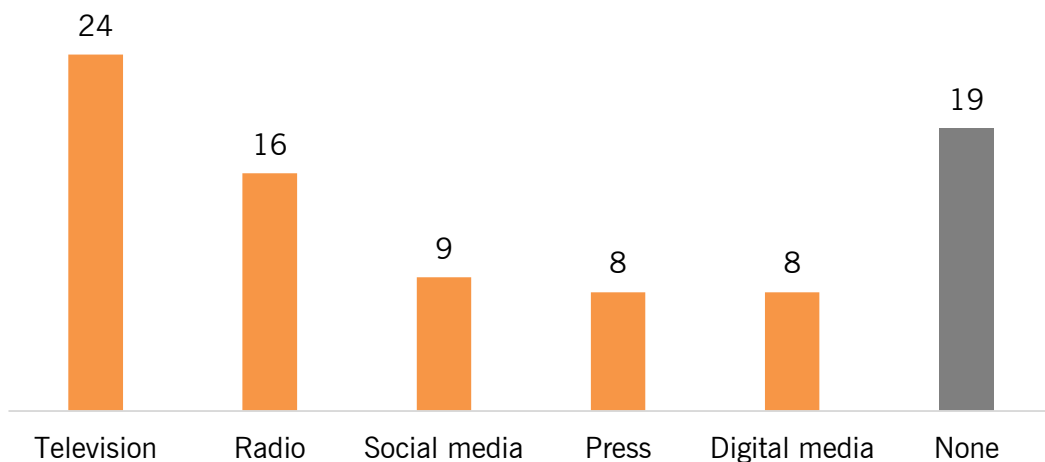
Source: Data for Catalonia: Centre of Opinion Studies. [Omnibus of the Government of Catalonia. 2023-2](#). September 2023.
Data for Spain and Europe: [Digital News report 2023](#).



The report: Credibility of the audiovisual media (1)

According to the survey respondents, the **traditional media** (TV and radio) provide the most **credible** information. Compared to last year, citizens' view of the credibility of the content on the social media has risen far more than the other media, and there is a significant number of people who **don't think any medium is credible (19%)**.

Generally speaking, what medium do you believe provides the most credible information?



In **Europe**, **radio is medium that provides the most credible information** (according to 56% of citizens), followed by TV and the press, with 49% each.

Around **50% and 70% of people mistrust the internet and the social media**, respectively.

Source: Data for Catalonia: Centre of Opinion Studies. [Omnibus of the Government of Catalonia. 2023-2](#). September 2023.
Data for Europe: [Digital News Report 2022](#).



The report: Credibility of the audiovisual media (2)

The perception of the credibility of the media shifts by citizens' age bracket: younger people believe the content provided on the social media; middle-aged people (35-49 years old) do not doubt the veracity of the contents provided by the digital media; and the older age brackets seek out the credibility of the traditional media (radio and TV).

	18-24	25-34	35-49	50-64	64 and older
TV	10.6	9.1	26.0	26.4	27.9
Radio	5.0	6.0	31.9	30.7	26.4
Press	10.2	10.7	25.6	29.7	23.8
Digital media	12.2	25.2	33.2	19.0	10.5
Social media	18.7	26.3	32.0	14.3	8.7
None	15.7	15.0	28.4	18.9	22.1

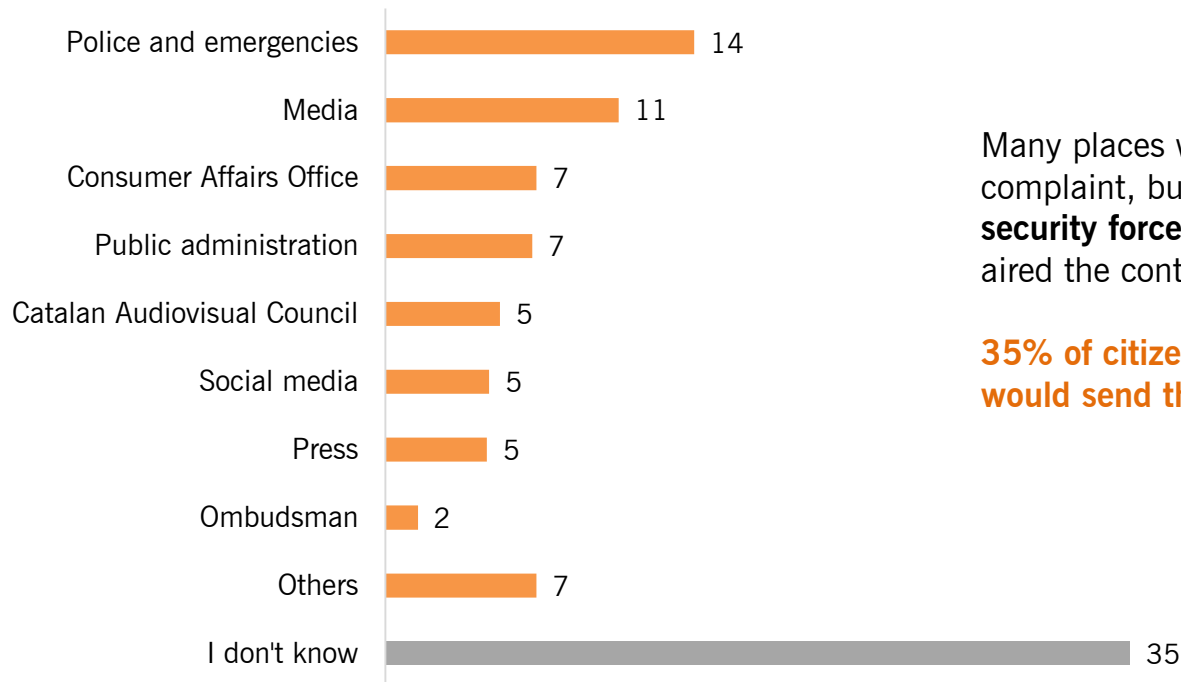
Source: Centre of Opinion Studies. [Omnibus of the Government of Catalonia. 2023-2.](#) September 2023



The report: Reaction to inappropriate content

More than half the survey respondents would forward a complain and/or report if faced with audiovisual content that believe is inappropriate.

If you wanted to submit a complaint or report on audiovisual content you find inappropriate, where would you send it?



Many places were chosen to send in a complaint, but the most common were the **security forces** and the **medium/platform** that aired the content.

35% of citizens do not know where they would send their complaint.

Source: Centre of Opinion Studies. [Omnibus of the Government of Catalonia. 2023-2](#). September 2023



News Flashes (1)



The new general audiovisual communication law 13/2022 law is approved

On 7 July, the government of Spain published the new general audiovisual communication law ([Law 13/2022](#)) in the BOE (official state gazette) after it was approved by the Senate in late June. This law repeals the previous one and regulates the audiovisual sector statewide, while also stipulating the basic regulations applicable on the regional and local levels, notwithstanding region and local authorities in their respective fields.

The new law marks the transposition of Spanish law to Directive (EU) 2018/1808 of 14 November 2018, which amends Directive 2010/13/EU of 10 March 2010 on audiovisual communication services.



8tv files for bankruptcy

In August, this private Catalan TV channel filed for bankruptcy. The factors conditioning the provider's economic situation include the end of the rental contracts of the Fibracat and Barça TV channels, as well as the downward trend in advertising revenues that is affecting the conventional TV sector.



Telefónica: Renewal of TV rights for football and change in shareholders

This telecommunications company has been awarded the audiovisual rights to broadcast the leading European football competitions exclusively for Spain for 960 million euros. Telefónica's purchase includes the broadcast rights of three seasons of men's football in the UEFA Champions League, the UEFA Conference League and the UEFA Europa League, among others.

In September, the Saudi Telecom Company (STC) acquired 9.9% of Telefónica for 2.1 billion euros, becoming the leading shareholder. This purchase is still awaiting the evaluation of the National Markets and Competition Commission (CNMC).



The presence of women in the Catalan media

According to the CAC report [Pluralisms and diversity in linear TV and radio contents](#), SX3 is the only Catalan medium where women's presence exceeds the threshold of 50%. This analysis, which was conducted between September and December 2022, shows that women are still underrepresented in the Catalan audiovisual media.



News Flashes (2)



UNESCO and the EU, in favour of applying ethical rules in AI

In June, UNESCO and the European Commission signed an agreement to accelerate the application of the [UNESCO Recommendation on the Ethics of Artificial Intelligence](#) (AI), which provides a common regulatory framework for all countries in the world with the goal of guaranteeing AI's respect for the fundamental freedoms and human rights. The signing of the agreement included an allocation of 4 million euros to help less developed countries to introduce these ethical rules into their regulations.



More than 12,500 audiovisual services in Europe

Yet another year, the European Audiovisual Observatory published its [report](#) on the audiovisual sector in Europe. According to its X-ray, the majority of audiovisual services available in Europe (12,664 in December 2022) are linear (9,349 TVs), compared to one-quarter non-linear services (3,315 on-demand services and video exchange platforms). US companies have a heavy presence and a strategic position in thematic children's TV and the SVoD audiovisual entertainment services sectors.



New edition of the Media Pluralism Monitor

Yet another year, the European University Institute and the Robert Schuman Centre have published their study on media pluralism in the digital age. The [Media Pluralism Monitor 2023](#) (MPM) analyses the potential risks related to four areas within the media: the protection of fundamental rights, the plurality of the market, political independence and social inclusion. The report offers the figures both overall and by country. The MPM for [Spain](#) was drawn up by a team from Blanquerna-Universitat Ramon Llull and concludes that the factor with the highest risk (69%) is the plurality of the market, in terms of problems of transparency regarding ownership and the financing of the media.



What is the European media ecosystem like?

The European Broadcasting Union (EBU)'s report [PSM competitive environment](#) offers an X-ray and crucial figures on the largest commercial media groups in Europe based on their income and audiences. The analysis compares this reality with that of the public service providers.



Main sources and bibliographic citation

Main sources:

CAC: the Council's own data

EGM: 2nd wave 2023. Catalonia data.

Barlovento Comunicación: monthly public reports.

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