



Butlletí d'informació sobre l'audiovisual a Catalunya

(Newsletter on the Media in Catalonia)

Third four months of 2018
Number 12. January 2019

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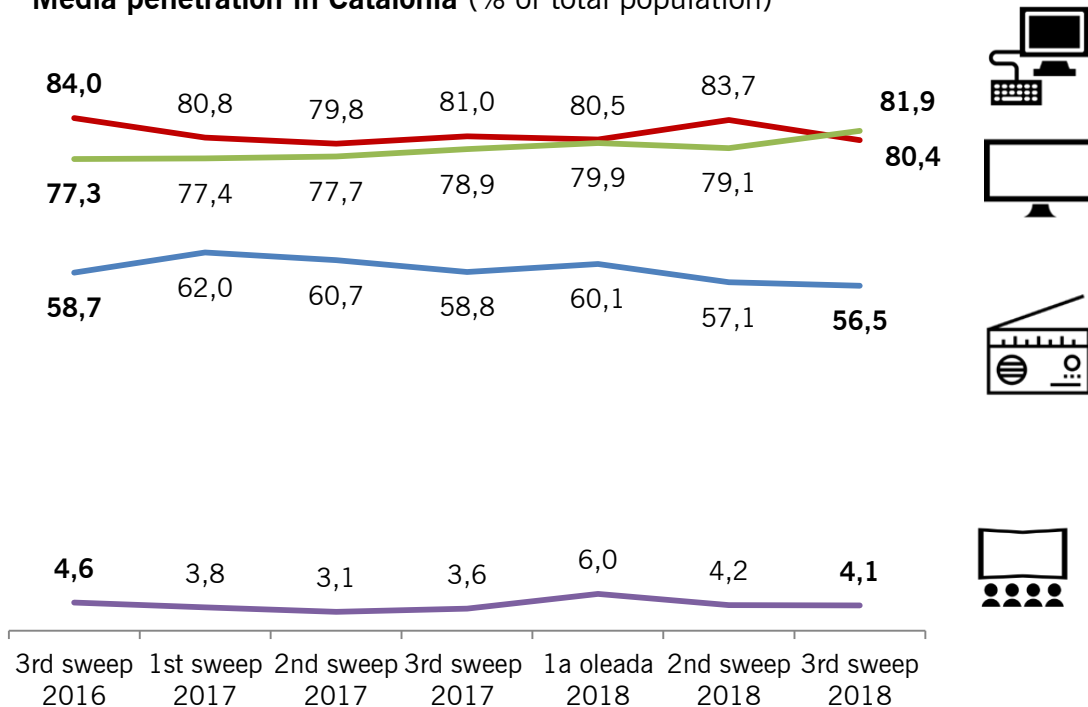
Newsflashes

45



Media penetration in Catalonia (1)

Media penetration in Catalonia (% of total population)



The population of Catalonia views an average of 3 hours and 23 minutes of television every day.

Notes: penetration reflects the share of each medium's audience in relation to the total population.
The internet data refer to the connection, irrespective of how this connection is used.
Periods: radio (Monday-Sunday); television and internet (audience for the day prior to the interview); cinema (last week).

Source: EGM – Catalonia data – 3rd sweep 2018.

Media penetration in Catalonia (2)

Media penetration in Catalonia by gender and age group (% of total population)



GENDER / AGE	TELEVISION	RADIO	INTERNET	CINEMA
Total population	80.4	56.5	81.9	4.1
Men	79.1	62.4	84.4	4.8
Women	81.6	51.0	79.7	3.4
14 to 19	68.2	46.9	95.8	6.7
20 to 24	69.3	51.9	97.6	7.5
25 to 34	74.9	58.5	96.8	6.4
35 to 44	76.4	61.0	95.0	4.0
45 to 54	81.6	61.5	88.4	3.1
55 to 64	85.9	61.9	78.0	4.0
65 and over	88.9	48.3	51.2	1.9
Average age	49.9	47.7	44.5	40.6

Source: EGM – Catalonia data – 3rd sweep 2018.

Audiovisual Media Services Directive 2018 (1)

On 28 November 2018, the *Official Journal of the European Union* (OJ EU) published the latest revision of the [Audiovisual Media Services Directive \(AVMSD\)](#). Member states must transpose their respective legal provisions by 19 September 2020.



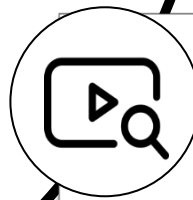
It strengthens the **COUNTRY OF ORIGIN PRINCIPLE** in line with the AVMSD currently in force and other European regulations such as the [Satellite and Cable Directive](#).



It incorporates regulations for **VIDEO-SHARING PLATFORMS (VSP)** and audiovisual content shared on **SOCIAL MEDIA SERVICES**, in addition to **TELEVISION** and **VIDEO-ON-DEMAND SERVICES (VoD)**,



PROTECTION OF MINORS has been extended. On video-sharing platforms, the coding and indexing of content have been reinforced, as well as parental control and age verification systems to access content.



VoD services need to have at least a 30% share of **EUROPEAN CONTENT** in their catalogues and ensure the **PROMINENCE** of this content to make it more visible for users in Europe.

Audiovisual Media Services Directive 2018 (2)



Reinforced protection for people and users from **INCITEMENT TO VIOLENCE OR HATRED, terrorism and other criminal offences**, including on video-sharing platforms.



More flexibility in **TELEVISION ADVERTISING**. Instead of the current 12 minutes per hour, broadcasters can choose more freely when to show ads throughout the day, with an overall limit of 20% of broadcasting time maintained between 6:00 to 18:00 and the same share allowed during prime time (from 18:00 to midnight).



Strengthened provisions to **PROTECT MINORS FROM ADVERTISING FOR FOODS** that are high in fat, salt, sodium and sugar, as well as encouraging codes of conduct at the EU level. Video-sharing platforms also have to respect certain obligations.



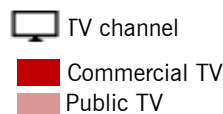
The **EUROPEAN REGULATORS GROUP FOR AUDIOVISUAL MEDIA SERVICES** ([ERGA](#)) has become the European Commission's official representative in the implementation of the revised AVMSD.



It recognises, recommends and promotes **MEDIA LITERACY** as a strategic requirement that is shared among the public authorities, traditional media and new distribution platforms.



Breakdown of TV channels in Catalonia



91 TV channels openly broadcast

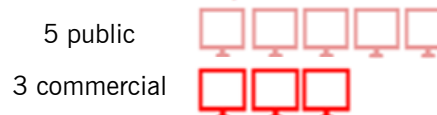
Most of the television supplied is commercial (74%) rather than public (26%).



Catalan households receive between 41 and 43 channels: 8 Catalan TV channels, 32 Spanish TV channels and the local TV channels.

TV supply by service zone

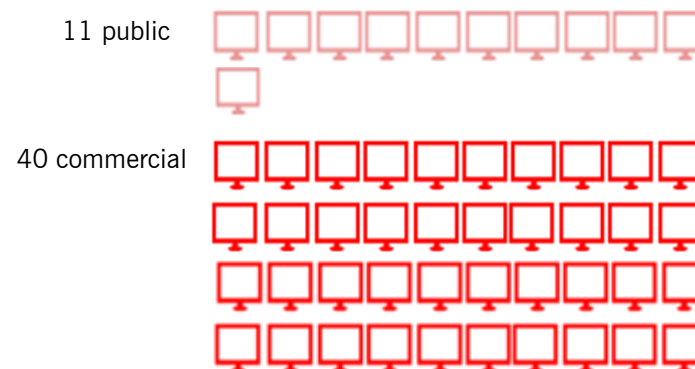
8 Catalan channels



32 Spanish channels



51 Local channels



Note: BIAC uses the term *channel* (usual term) to refer to DTT *programmes* (technical and administrative term) broadcast by each multiplex (MUX).
Source: Catalan Audiovisual Council (Catalan and local DTT channels) and Ministry of the Economy and Business (Spanish DTT channels). December 2018.

Catalan TV channels

 TV channel
  Public TV
  Commercial TV
  Language used

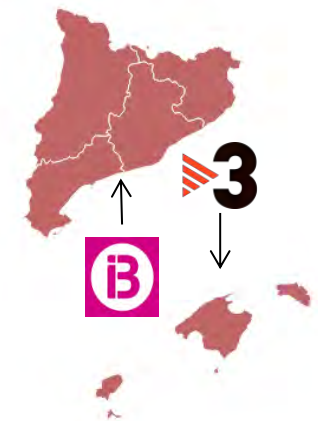
By ownership, supply and language used

 Catalan

8 Catalan channels	5 public 62%	Corporació Catalana de Mitjans Audiovisuals (CCMA)      
	3 commercial 37%	Grupo Godó   Futbol Club Barcelona 

+ Reciprocal broadcasts

The Balearic channel IB3 Global has been seen in Catalonia since April 2016.



Source: Catalan Audiovisual Council. December 2018.

Spanish TV channels

 TV channel
  Public TV
  Commercial TV
  Language used

By ownership, supply and language used

 Spanish

32 Spanish channels	7 public 22%	Corporación de Radio y Televisión Española (CRTVE)       				
	25 commercial 78%	Atresmedia Televisión     neox NOVA MEGA 	Mediaset España         	NET Televisión   VEO Televisión DMAX GOL	13 Televisión TRECE Real Madrid Televisión  Real Madrid TV	Grupo Secuoya  Grupo Kiss Media DKISS

Note: CRTVE broadcasts content in Catalan in Catalonia via the channels La 1, La 2 and Canal 24 Horas.

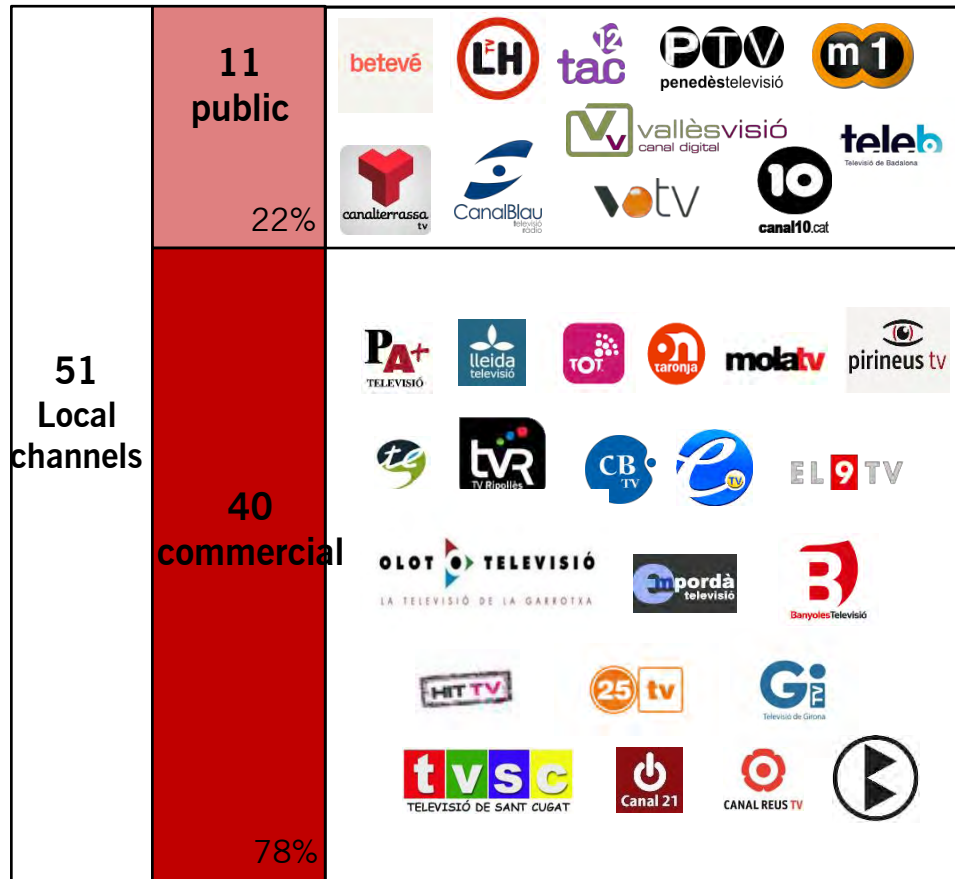
Source: Catalan Audiovisual Council and corporate websites of audiovisual communication service providers. December 2018.

Local television

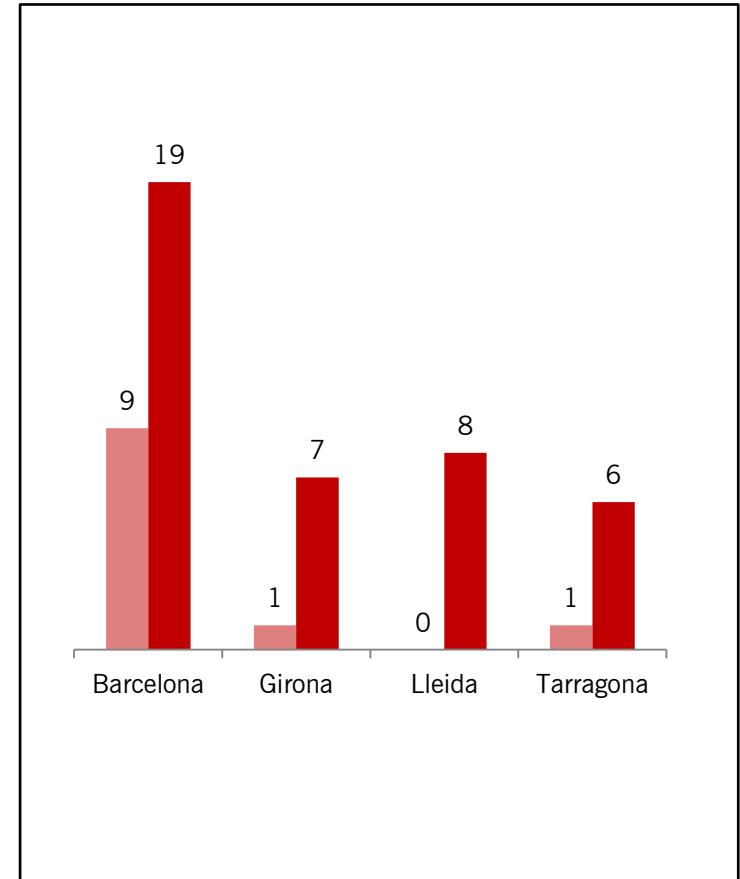
TV channel Public TV Commercial TV Language used

Catalan

DTT channels and programmes by ownership, supply and language



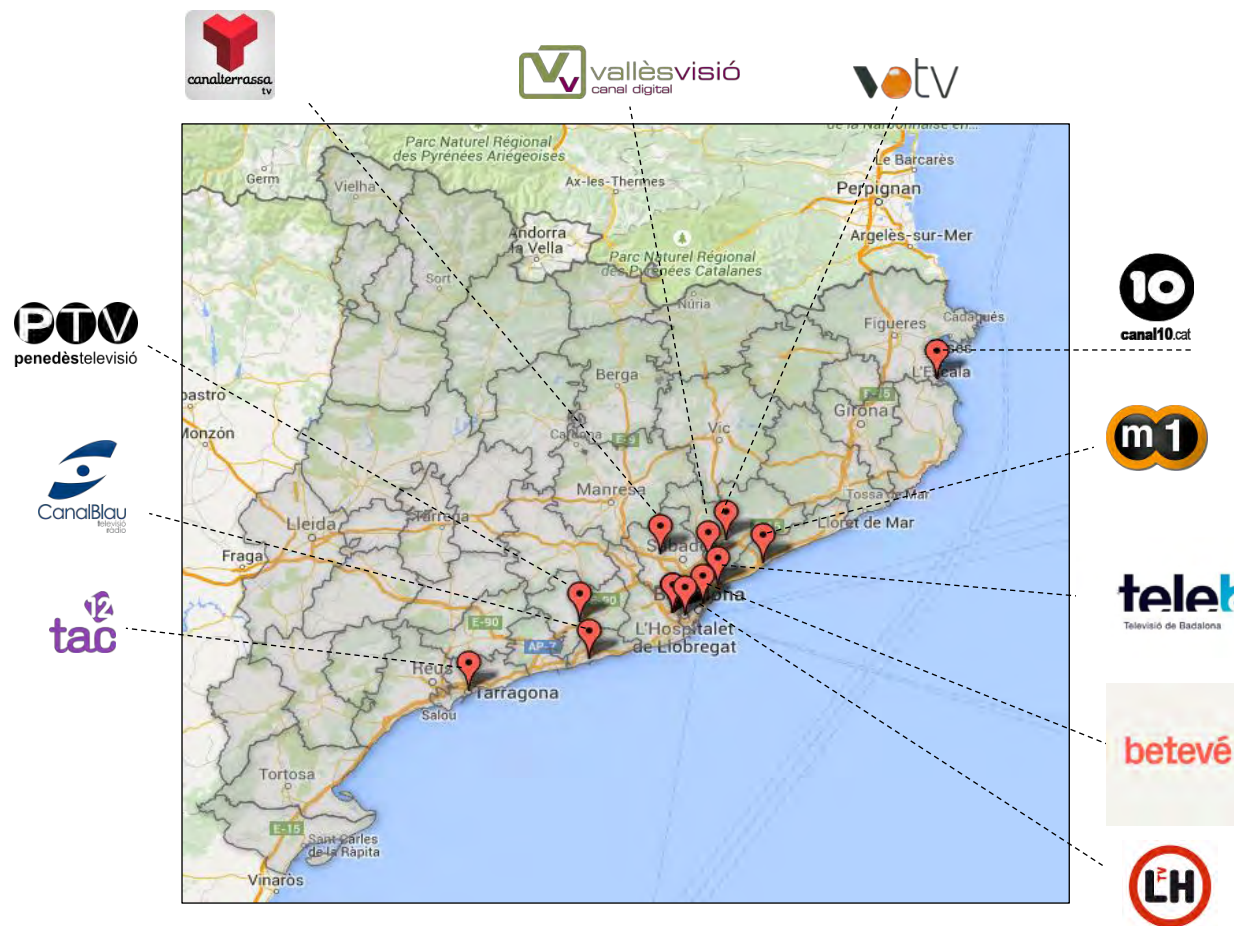
DTT programmes: geographical breakdown by province



Source: Catalan Audiovisual Council. December 2018.

Public local television

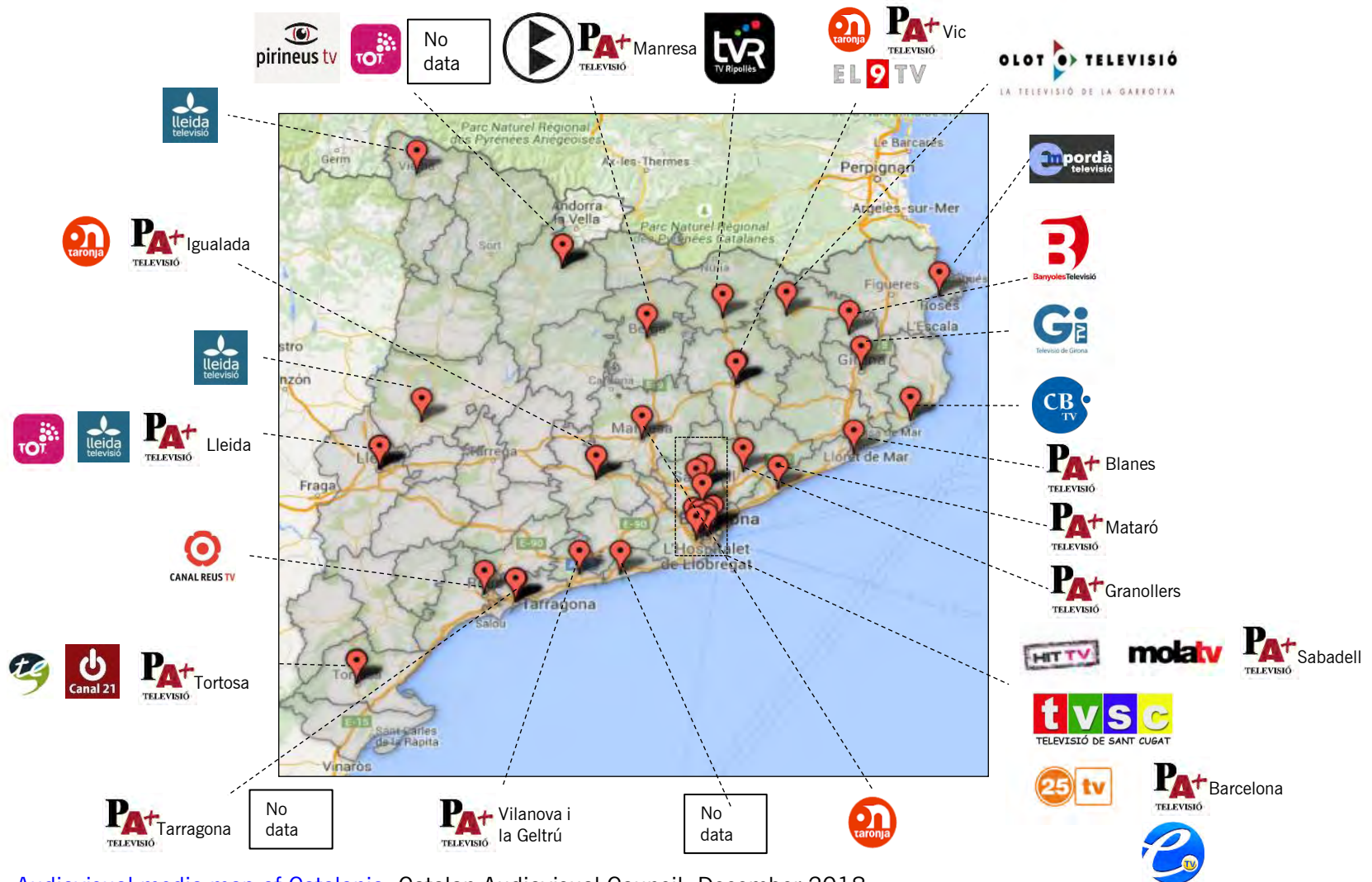
Supply of the 11 public local television channels



Source: [Audiovisual media map of Catalonia](#), Catalan Audiovisual Council. December 2018.

Commercial local television (1)

Supply of the 40 commercial local television channels

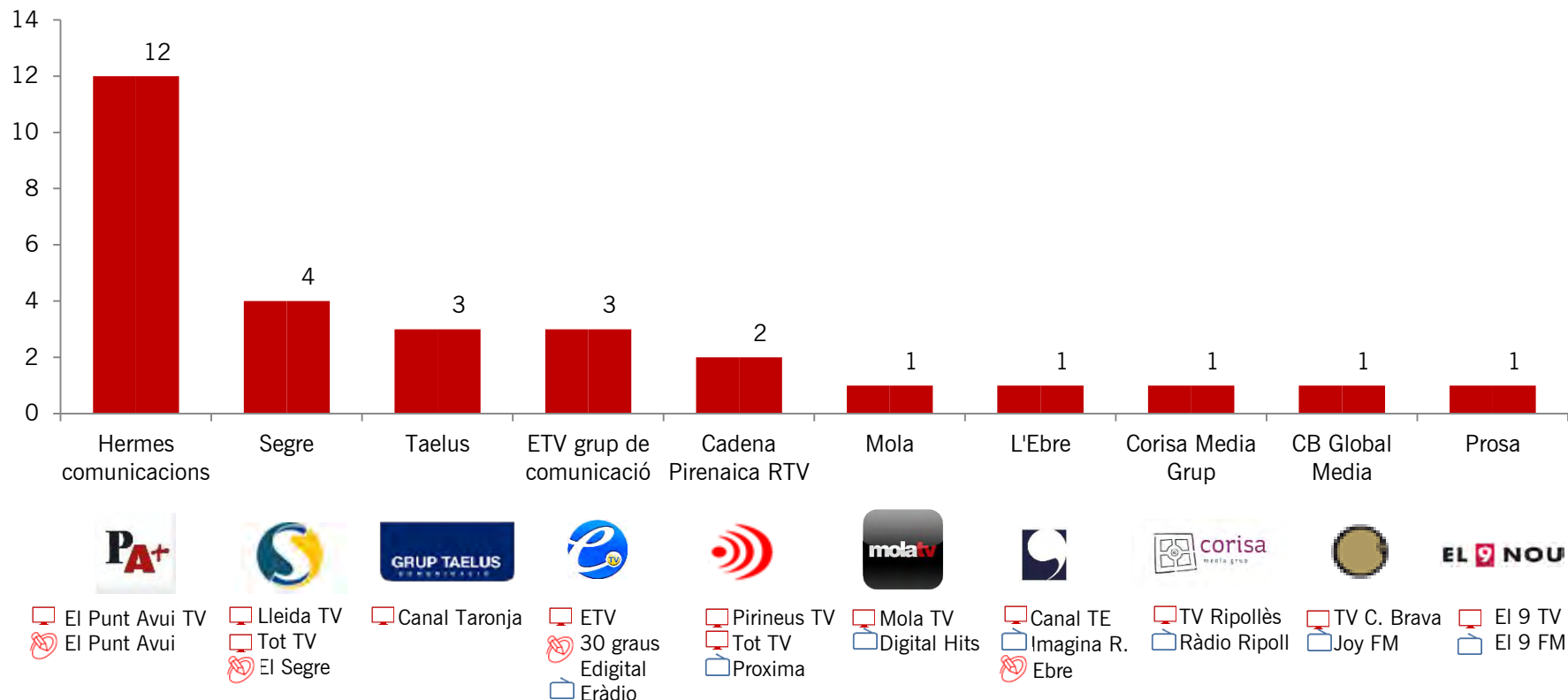


Source: [Audiovisual media map of Catalonia](#), Catalan Audiovisual Council. December 2018.

Commercial local television (2)

Commercial local media groups present in the local TV sector

 TV channel
  Radio broadcaster
  Press

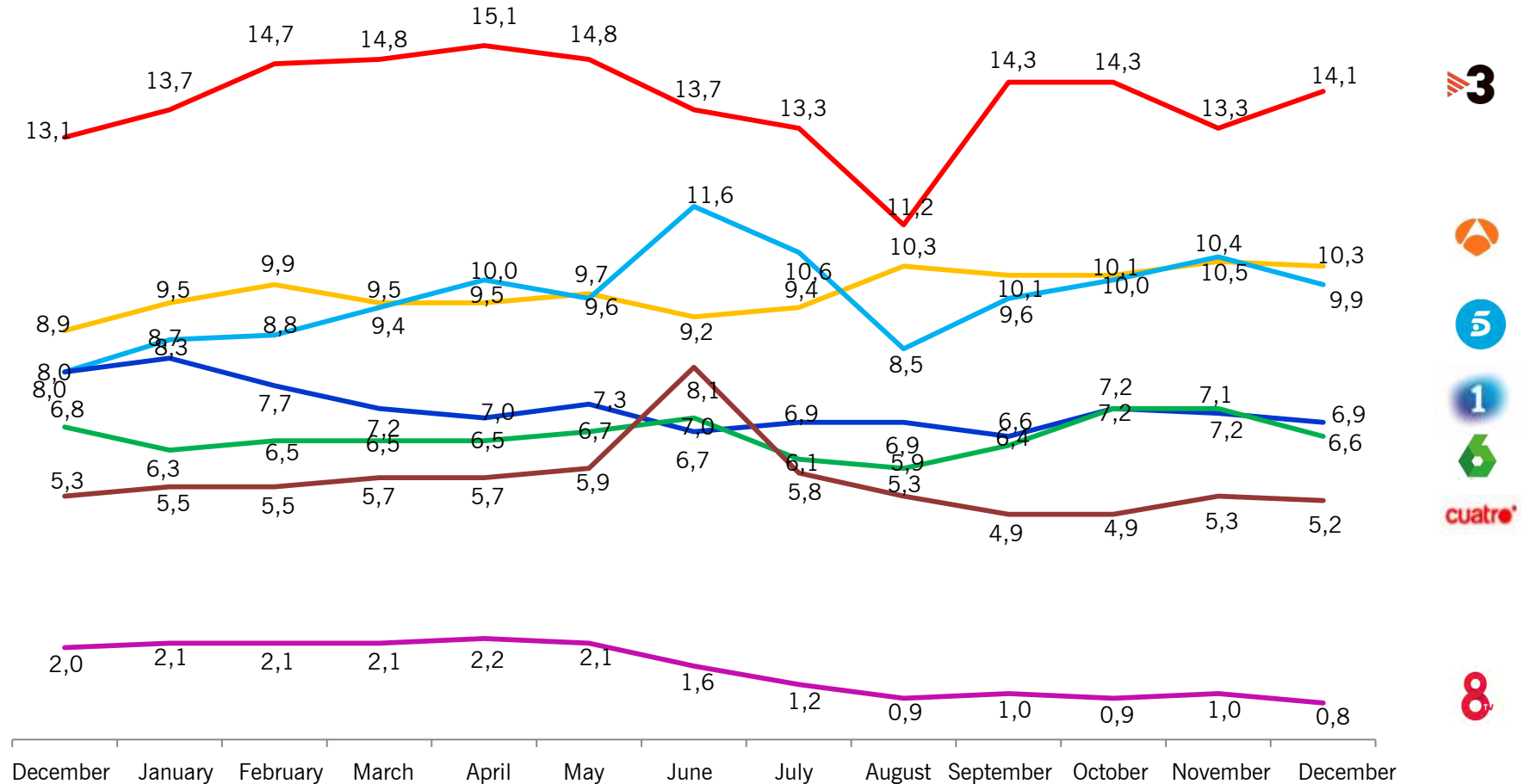


Source: Catalan Audiovisual Council. December 2018.

Television audiences (1)

Monthly trend in the share of the main channels in Catalonia

(in %, from December 2017 to December 2018)



Note: *Share* is the percentage of individuals watching a specific channel in relation to the total number of individuals watching TV at that time.
 Source: Catalan Audiovisual Council, based on data from Kantar Media.

Television audiences (2)

Monthly share per channel in Catalonia

(in %, from January to December 2018, in descending order according to December's ranking)

	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
TV3	13.7	14.7	14.8	15.1	14.8	13.7	13.3	11.2	14.3	14.3	13.3	14.1
Antena 3 TV	9.5	9.9	9.5	9.5	9.7	9.2	9.4	10.3	10.1	10.1	10.4	10.3
Telecinco	8.7	8.8	9.4	10.0	9.6	11.6	10.6	8.5	9.6	10.0	10.5	9.9
La1	8.3	7.7	7.2	7.0	7.3	6.7	6.9	6.9	6.6	7.2	7.1	6.9
laSexta	6.3	6.5	6.5	6.5	6.7	7.0	6.1	5.9	6.4	7.2	7.2	6.6
Cuatro	5.5	5.5	5.7	5.7	5.9	8.1	5.8	5.3	4.9	4.9	5.3	5.2
Energy	2.0	1.8	2.0	1.8	2.0	2.4	2.6	3.3	3.1	3.2	3.4	3.2
Factoría de Ficción	3.2	3.1	3.0	3.1	2.7	2.7	3.5	3.2	3.1	3.0	3.0	3.1
Neox	2.6	2.7	2.6	2.4	2.6	2.5	2.6	2.8	2.5	2.5	2.3	2.8
Paramount Channel	2.1	2.2	2.2	2.0	2.0	1.9	2.2	2.5	2.1	2.4	2.3	2.5
La2	2.1	2.2	2.1	2.0	2.1	1.9	2.1	2.4	2.3	2.3	2.3	2.3
TRECE	2.2	2.0	2.0	2.1	2.3	1.9	2.4	2.5	1.9	1.6	1.7	2.0
DMax	1.8	1.6	1.7	1.8	1.8	1.8	1.8	2.2	2.0	2.0	1.9	1.9
Nova	1.9	1.9	1.8	2.1	2.0	1.8	2.4	2.3	1.9	1.7	1.7	1.9
Divinity	2.4	2.5	2.3	2.4	2.1	2.1	2.3	2.5	2.3	2.0	2.1	1.8
3/24	1.9	1.9	2.2	2.0	2.0	1.8	1.5	1.7	1.7	1.9	1.7	1.7
Mega	1.6	1.2	1.5	1.4	1.5	1.5	1.7	1.7	1.5	1.5	1.6	1.7
Atreseries	1.5	1.4	1.4	1.6	1.5	1.4	1.5	1.8	1.7	1.7	1.8	1.6
Clan	1.6	1.5	1.5	1.3	1.2	1.4	1.5	1.3	1.4	1.4	1.4	1.4
Dkiss	0.9	0.9	0.8	1.0	1.1	1.0	1.2	1.2	1.2	1.0	1.2	1.1
Disney Channel	0.7	0.9	0.6	0.7	0.7	0.9	0.7	0.7	0.9	0.8	1.0	0.9
Boing	0.8	1.0	0.9	0.7	0.9	0.9	1.0	0.9	0.9	0.9	0.9	0.9
8tv	2.1	2.1	2.1	2.2	2.1	1.6	1.2	0.9	1.0	0.9	1.0	0.8
Super3/33	1.0	1.1	1.1	0.9	0.9	0.9	0.8	0.9	0.9	0.8	0.8	0.8
BeMad	0.7	0.6	0.6	0.6	0.6	0.7	0.7	0.9	0.7	0.8	0.7	0.8
24h	0.7	0.8	0.9	0.7	0.8	0.9	0.8	0.6	0.7	0.8	0.6	0.7
Gol	1.0	0.9	0.6	1.0	0.9	0.7	0.6	0.7	0.6	0.8	0.6	0.7
Esport3	0.6	0.5	0.6	0.7	0.6	0.5	0.3	0.4	0.5	0.6	0.5	0.4
Teledporte	0.5	0.4	0.4	0.6	0.6	0.4	1.4	0.9	0.8	0.5	0.4	0.4
TEN	0.4	0.4	0.4	0.5	0.4	0.4	0.4	0.4	0.4	0.3	0.3	0.2
RAC105	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1

Source: Catalan Audiovisual Council, based on data from Kantar Media.

Television audiences (3)

Audience share in Catalonia (in % and average for 2018)

Position	Channel	Average	Position	Channel	Average
1		14.0	18		1.5
2		9.8	19		1.5
3		9.8	20		1.4
4		7.2	21		1.0
5		6.6	22		0.9
6		5.6	23		0.9
7		3.1	24		0.8
8		2.6	25		0.8
9		2.5	26		0.7
10		2.2	27		0.7
11		2.2	28		0.6
12		2.2	29		0.5
13		2.0	30		0.4
14		1.9	31		0.4
15		1.9		Specialty pay	6.9
16		1.8			
17		1.6			

TV3 has increased its audience share compared with 2017 and is audience leader in Catalonia for the ninth consecutive year.

Antena3 TV is in second position with the same audience share as Telecinco, whose audiences have decreased considerably compared with the previous year.

La1 is still fourth with a similar percentage to the one achieved in 2017.

LaSexta has also remained in fifth place.

Source: Catalan Audiovisual Council, based on data from Kantar Media.

Television audiences (4)

Audience share in Catalonia (% by group, average from January to December 2018)



Mediaset is still the TV group with the most audience in Catalonia.

Atresmedia, in second place, is now less than one percentage point below Mediaset, a narrower gap than the previous year.

The CCMA audience share is still larger than CRTVE, with a difference of almost 5 percentage points.

Source: Catalan Audiovisual Council, based on data from Kantar Media.

Television audiences: highest ratings

September 2018

Programme	Channel	Date	AM(000)	Share (%)
30 MINUTS / MARCATS PER L'1 D'OCTUBRE	3	30/09/2018	854	29.2
POLÒNIA	3	13/09/2018	766	28.5
TELENOTÍCIES VESPRE	3	11/09/2018	756	26.9
TELENOTÍCIES VESPRE	3	12/09/2018	689	27.3
POLÒNIA	3	27/09/2018	659	25.1
PIROMUSICAL	3	24/09/2018	629	22.9
TELENOTÍCIES VESPRE	3	13/09/2018	622	24.8
TELENOTÍCIES VESPRE	3	19/09/2018	618	25.1
TELENOTÍCIES VESPRE	3	27/09/2018	611	24.7
POLÒNIA	3	20/09/2018	604	23.5

November 2018

Programme	Channel	Date	AM(000)	Share (%)
TELENOTÍCIES VESPRE	3	20/11/2018	699	25.7
TELENOTÍCIES VESPRE	3	15/11/2018	669	23.5
POLÒNIA	3	08/11/2018	664	23.5
TELENOTÍCIES VESPRE	3	07/11/2018	658	25.6
TELENOTÍCIES VESPRE	3	05/11/2018	654	23.5
POLÒNIA	3	15/11/2018	654	22.7
TELENOTÍCIES VESPRE	3	21/11/2018	652	24.2
TELENOTÍCIES VESPRE	3	19/11/2018	642	23.0
POLÒNIA	3	22/11/2018	640	24.2
TELENOTÍCIES VESPRE	3	08/11/2018	633	25.8

October 2018

Programme	Channel	Date	AM(000)	Share (%)
TELENOTÍCIES VESPRE	3	01/10/2018	795	28.7
TELENOTÍCIES VESPRE	3	18/10/2018	703	27.3
TELENOTÍCIES VESPRE	3	15/10/2018	696	24.5
POLÒNIA	3	04/10/2018	686	25
TELENOTÍCIES VESPRE	3	29/10/2018	661	25.2
TELENOTÍCIES VESPRE	3	17/10/2018	652	25.7
POLÒNIA	3	18/10/2018	644	22.8
SENSE FICCIÓ / LA GENT DE L'ESCALA	3	01/10/2018	638	24.5
TELENOTÍCIES VESPRE	3	09/10/2018	632	23.2
TELENOTÍCIES VESPRE	3	02/10/2018	631	23.6

December 2018

Programme	Channel	Date	AM(000)	Share (%)
CAMPANADES FI D'ANY	3	31/12/2018	751	36.8
TELENOTÍCIES VESPRE	3	20/12/2018	680	28.2
SENSE FICCIÓ / VOX: LA AMBICIÓ DE SANTIAGO ABASCAL	3	04/12/2018	675	25.3
POLÒNIA	3	13/12/2018	675	25.1
POLÒNIA	3	20/12/2018	657	24.7
TELENOTÍCIES VESPRE	3	13/12/2018	635	24.3
SENSE FICCIÓ / CAUSA ESPECIAL 20907/2017	3	18/12/2018	635	24.5
TELENOTÍCIES VESPRE	3	18/12/2018	631	25.7
TELENOTÍCIES VESPRE	3	04/12/2018	627	23.0
FUTBOL: COPA DEL REI / BARCELONA-CULTURAL LEONESA	3	05/12/2018	625	23.6

Source: Catalan Audiovisual Council, based on data from Kantar Media.

Specialty pay TV audiences

In Catalonia, pay TV has an average daily audience of over 70,000 viewers.

Average daily audience for the main pay TV channels in Catalonia. December 2018 (in thousands)

						
4.1	3.3	2.8	2.6	2.4	2.1	1.9
						
1.8	1.7	1.6	1.6	1.5	1.5	1.5
						
1.3	1.3	1.3	1.2	1.1	0.9	0.9
						
0.8	0.7	0.7	0.7	0.7	0.7	0.7

Source: Catalan Audiovisual Council, based on data from Kantar Media.



Breakdown of radio broadcasters in Catalonia

Public
Commercial

263 radio broadcasters

The total number of frequencies used by the radio broadcasting sector is 787, 75% (589) broadcast by public stations.



Catalan households receive over 30 broadcasters: 10 Catalan stations, 20 Spanish and also local stations.

By service zone

12 Catalan broadcasters

4 public
8 commercial



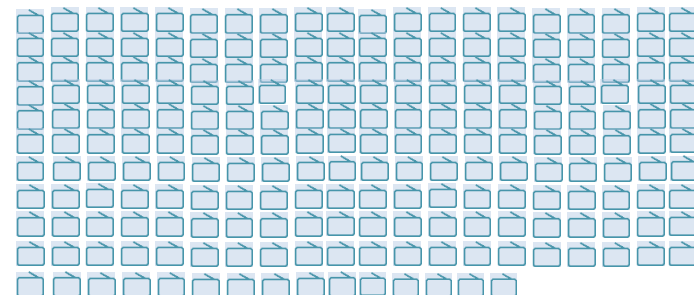
20 Spanish broadcasters

5 public
15 commercial



231 Local broadcasters

215 public



16 commercial



Note: BIAC uses the term *broadcaster* for the medium broadcasting a radio product on one or more frequencies.

Source: CAC (local FM), CCMA (commercial Catalan and Spanish FM) and the Ministry of the Economy and Business (public Spanish FM). December 2018.

Public radio

 Language used

By service zone and broadcast language

224 Public broadcasters	4 Catalan broadcasters	CCMA  Cat     Catalan
	5 Spanish broadcasters	CRTVE       Spanish and Catalan (only Ràdio 4)
	215 Local broadcasters	                     Catalan

Source: Catalan Audiovisual Council (Local FM), Corporació Catalana de Mitjans Audiovisuals (Catalan FM) and the Ministry of the Economy and Business (Spanish FM). December 2018.

Commercial radio

 Language used

By service zone and broadcast language

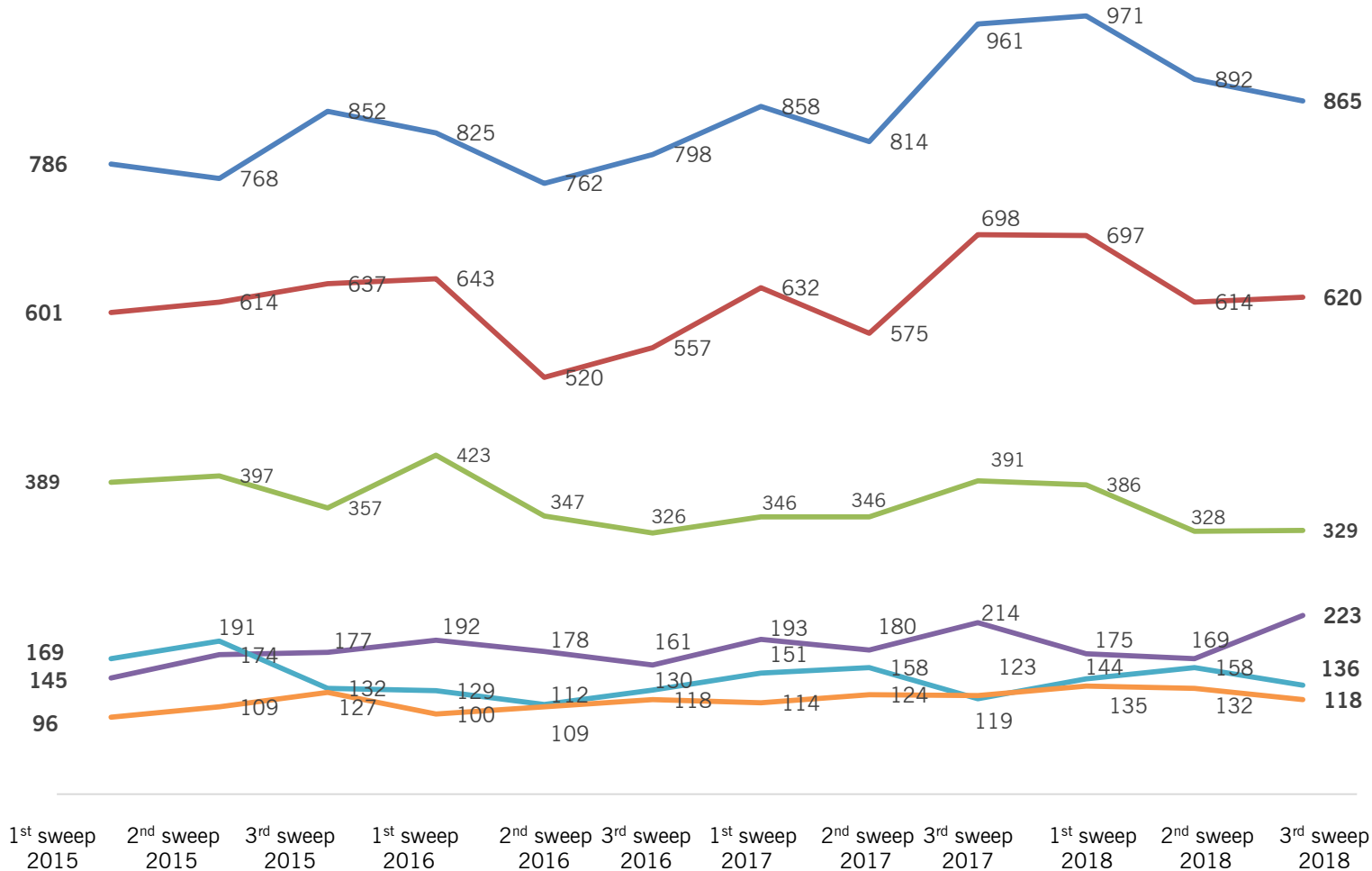
39 Commercial broadcasters	8 Catalan broadcasters	GODÓ   FLAIX   TELE TAXI   ESTEL  PRISA   Catalan
	15 Spanish broadcasters	PRISA       COPE    ATRESMEDIA    RADIO BLANCA  UNIDAD EDITORIAL   Spanish (except regional sections)
	16 Local broadcasters ^A	                Catalan

^A The following broadcasters are absent as they have lost their licences: Publicacions Penedès, SL and Llegeix Escriu Escolta Català, SL.
Source: Catalan Audiovisual Council. December 2018.

Radio audiences (1)

General radio ranking. Audiences

(trend in the last twelve sweeps, in thousands, day prior to interview, from Monday to Friday)

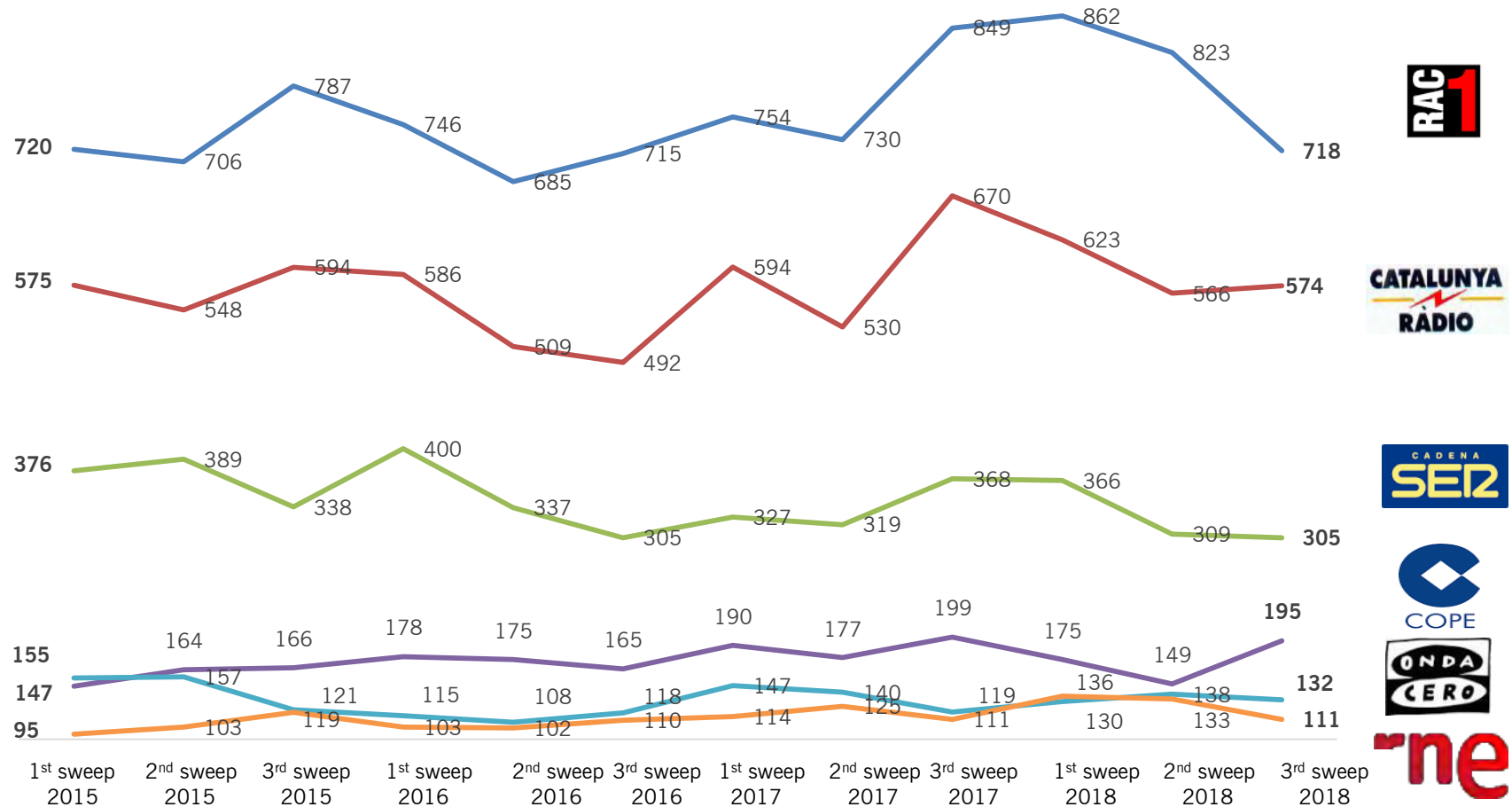


Source: EGM – Catalonia data – 3rd sweep of 2018.

Radio audiences (2)

General radio ranking. Audiences

(trend in the last twelve sweeps, in thousands, day prior to interview, from Monday to Sunday)

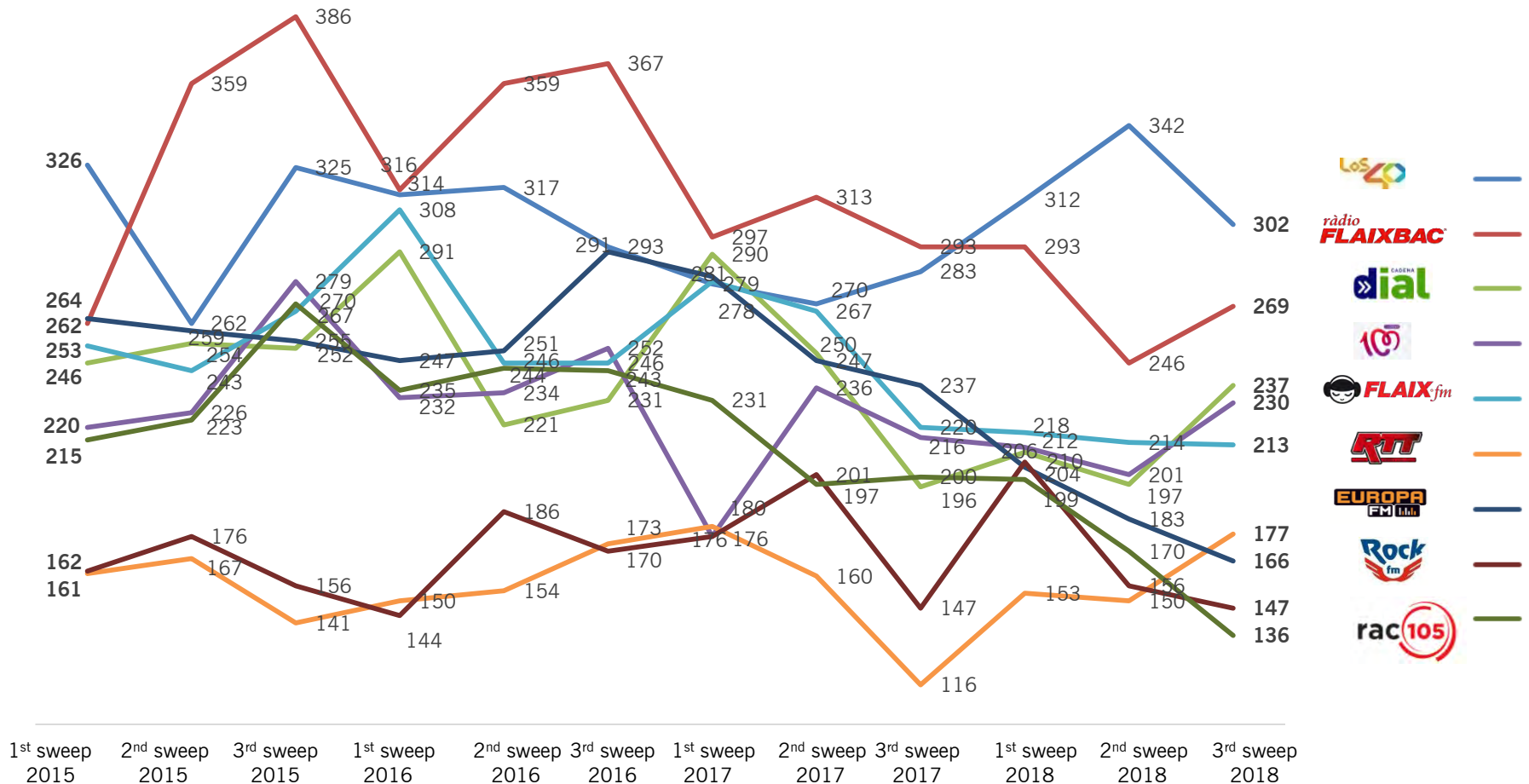


Source: EGM – Catalonia data – 3rd sweep of 2018.

Radio audiences (3)

Music radio ranking. Audiences

(trend in the last twelve sweeps, in thousands, day prior to interview, from Monday to Friday)

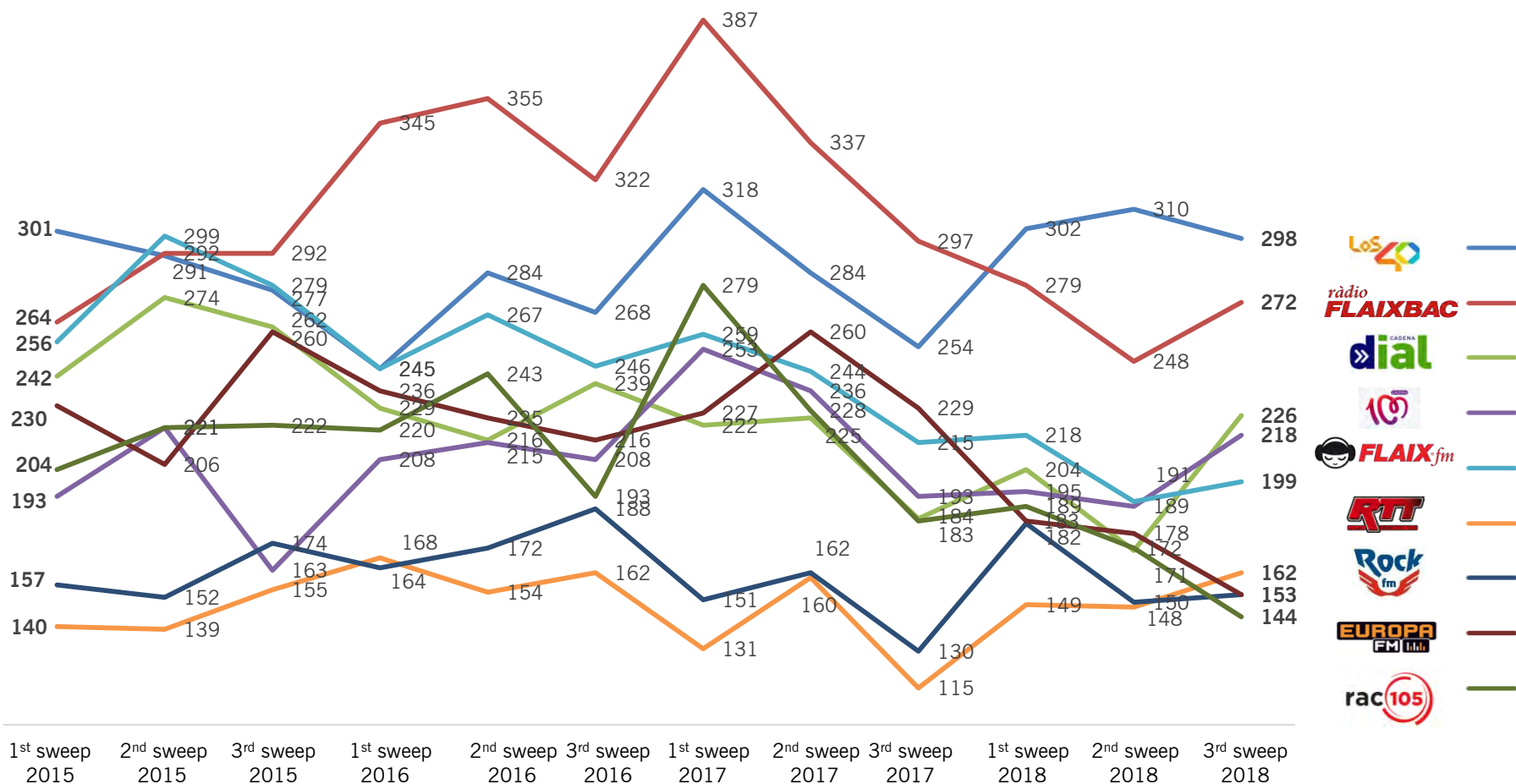


Source: EGM – Catalonia data – 3rd sweep of 2018.

Radio audiences (4)

Music radio ranking. Audiences

(trend in the last twelve sweeps, in thousands, day prior to interview, from Monday to Sunday)

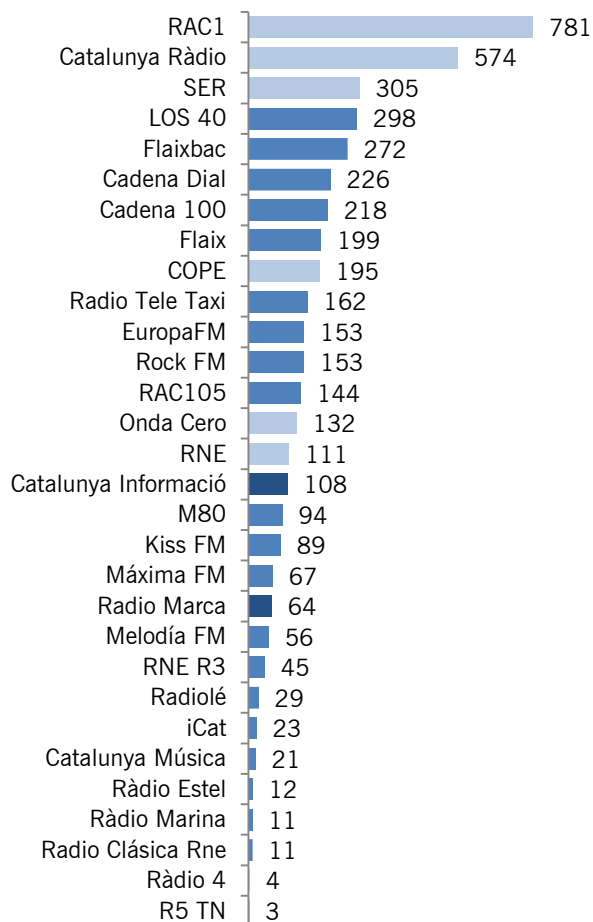


Source: EGM – Catalonia data – 3rd sweep of 2018.

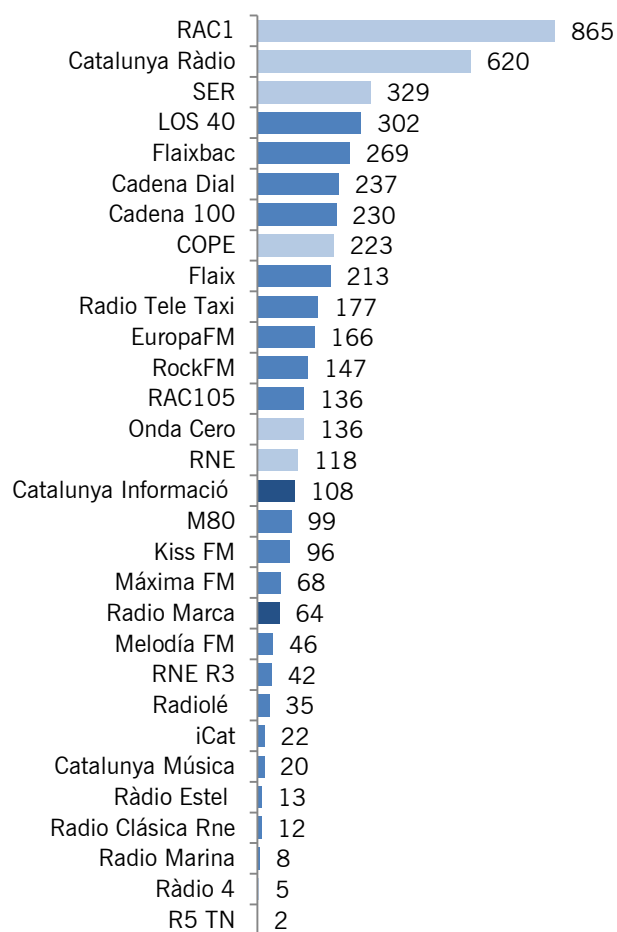
Radio audiences (5)

Cumulative daily radio audiences in Catalonia (in thousands, out of total population, day prior to interview)

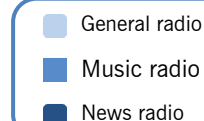
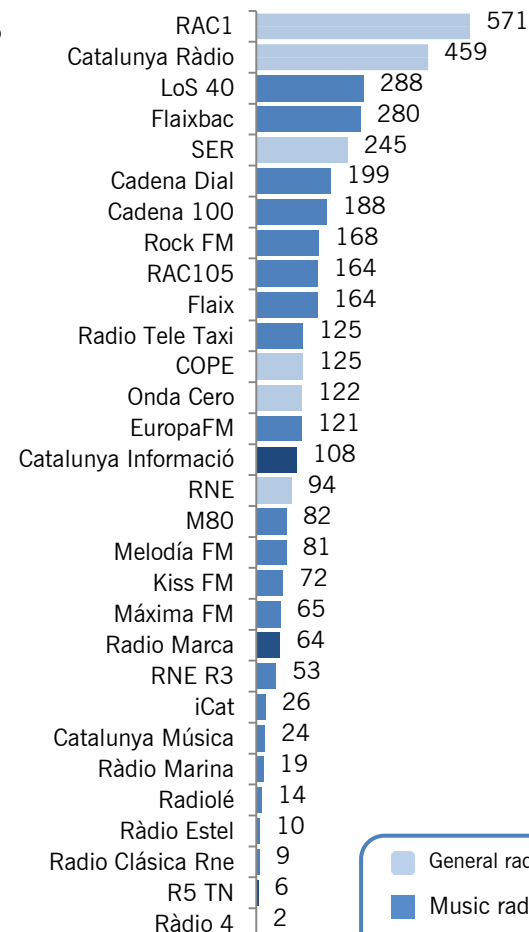
Monday to Sunday



Monday to Friday



Saturday and Sunday

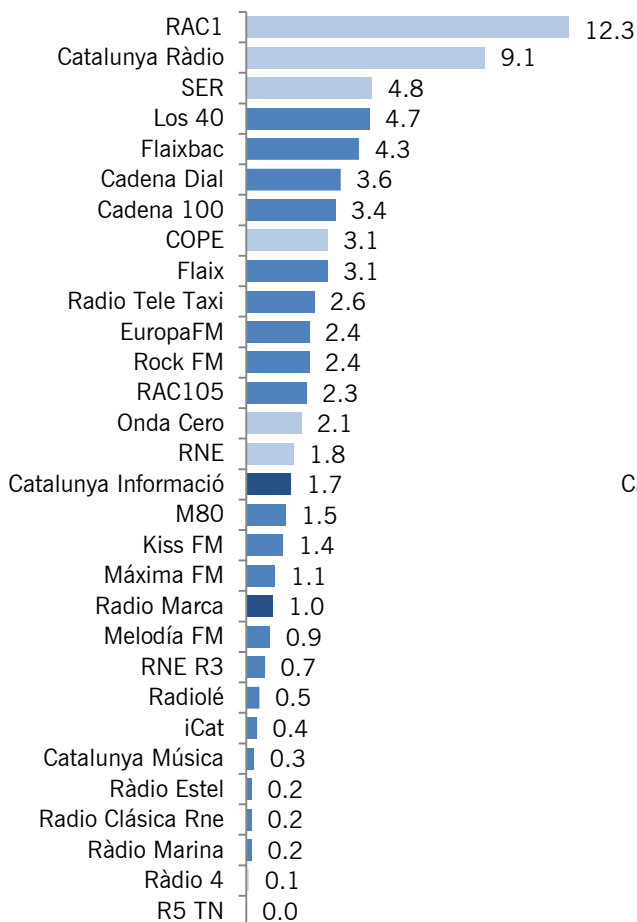


Source: EGM – Catalonia data – 3rd sweep of 2018.

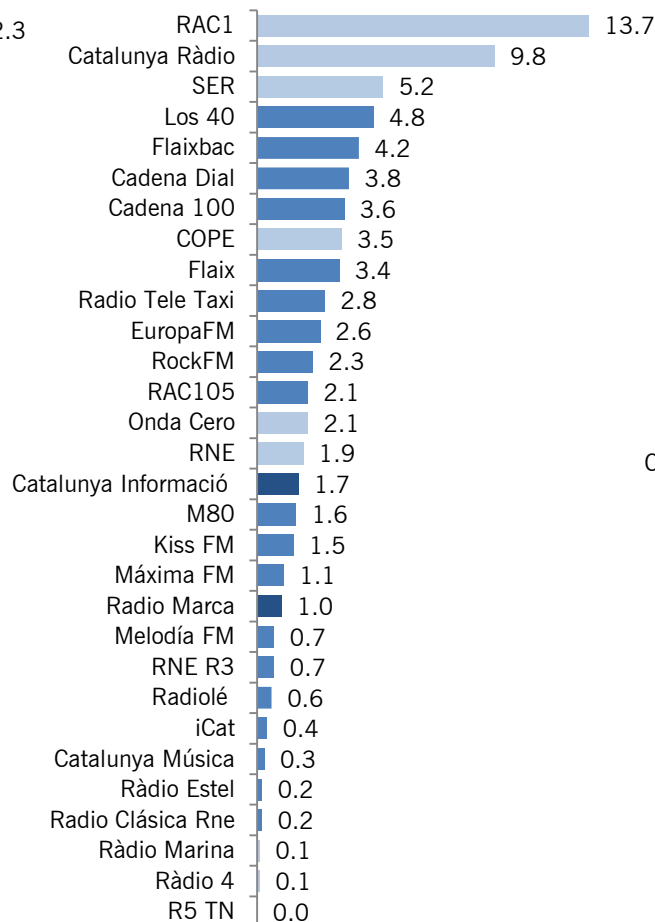
Radio audiences (6)

Cumulative daily radio audiences in Catalonia (in %, out of total population, day prior to interview)

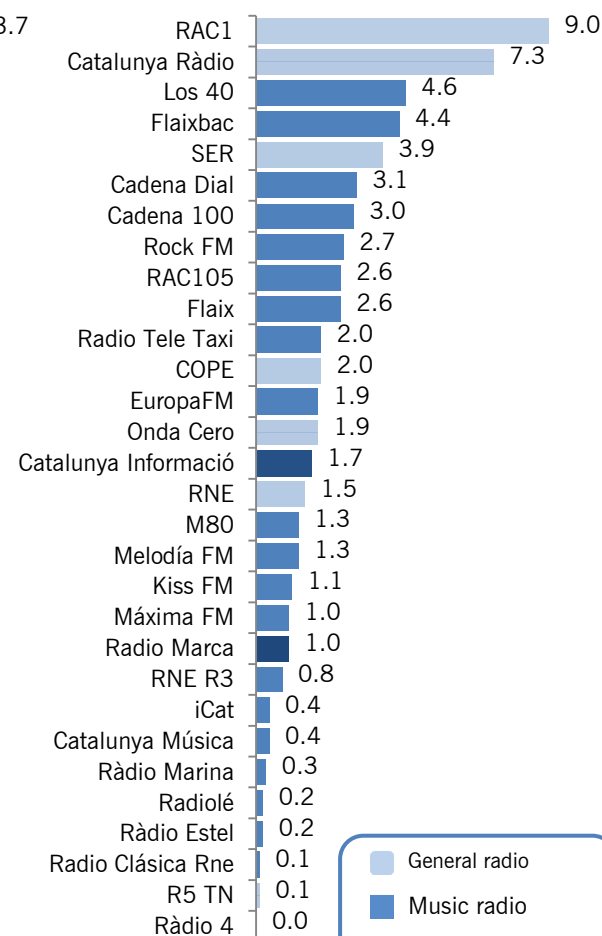
Monday to Sunday



Monday to Friday



Saturday and Sunday



General radio
Music radio
News radio

Source: EGM – Catalonia data – 3rd sweep of 2018.

Radio audiences by time slot

In Catalonia, every day 1,996,000 people listen to general radio stations and, of these, 1,541,000 do so during the morning slot from 06:00 to 12:00, Monday to Friday.

Radio audiences by time slot of the main general channels in Catalonia

(thousands of listeners, Monday to Friday, ordered by cumulative audience, previous sweep in brackets)

Broadcaster	Cumulative audience	 06:00 to 12:00	 12:00 to 16:00	 16:00 to 20:00	 20:00 to 06:00
	865 (892)	644 (701)	350 (365)	262 (324)	212 (202)
	620 (614)	456 (446)	216 (185)	143 (122)	142 (136)
	329 (328)	198 (203)	67 (76)	80 (77)	121 (145)
	223 (169)	149 (114)	34 (44)	27 (20)	99 (80)
	136 (158)	78 (95)	46 (26)	39 (57)	41 (33)
	118 (132)	82 (77)	40 (28)	21 (26)	39 (52)

Source: EGM – Catalonia data – 3rd sweep of 2018.



Internet

Internet use

Frequency of internet use

(by gender and age, in %, out of all people aged 16 to 74 that have used the internet in the past 3 months)

	Absolute	Daily, at least 5 days a week	Every week but not every day	Less than once a week	Internet use various times a day
Gender					
Male	2,403,399	82.8	14.5	2.7	79.4
Female	2,460,373	80.1	16.2	3.7	77.0
Age					
From 16 to 24	644,559	90.2	7.8	2.0	90.2
From 24 to 34	807,441	86.4	10.0	3.7	86.4
From 35 to 44	1,190,540	83.3	15.3	1.4	80.6
From 45 to 54	1,097,964	81.5	16.2	2.3	77.5
From 55 to 64	732,889	73.7	21.9	4.3	66.5
From 65 to 74	390,379	65.1	24.4	10.5	58.0
TOTAL	4,863,772	81.4	15.3	3.2	78.2



In Catalonia, 4.8 million people regularly use the internet.

The young age group from 16 to 24 uses the internet most often throughout the week and more than once a day.

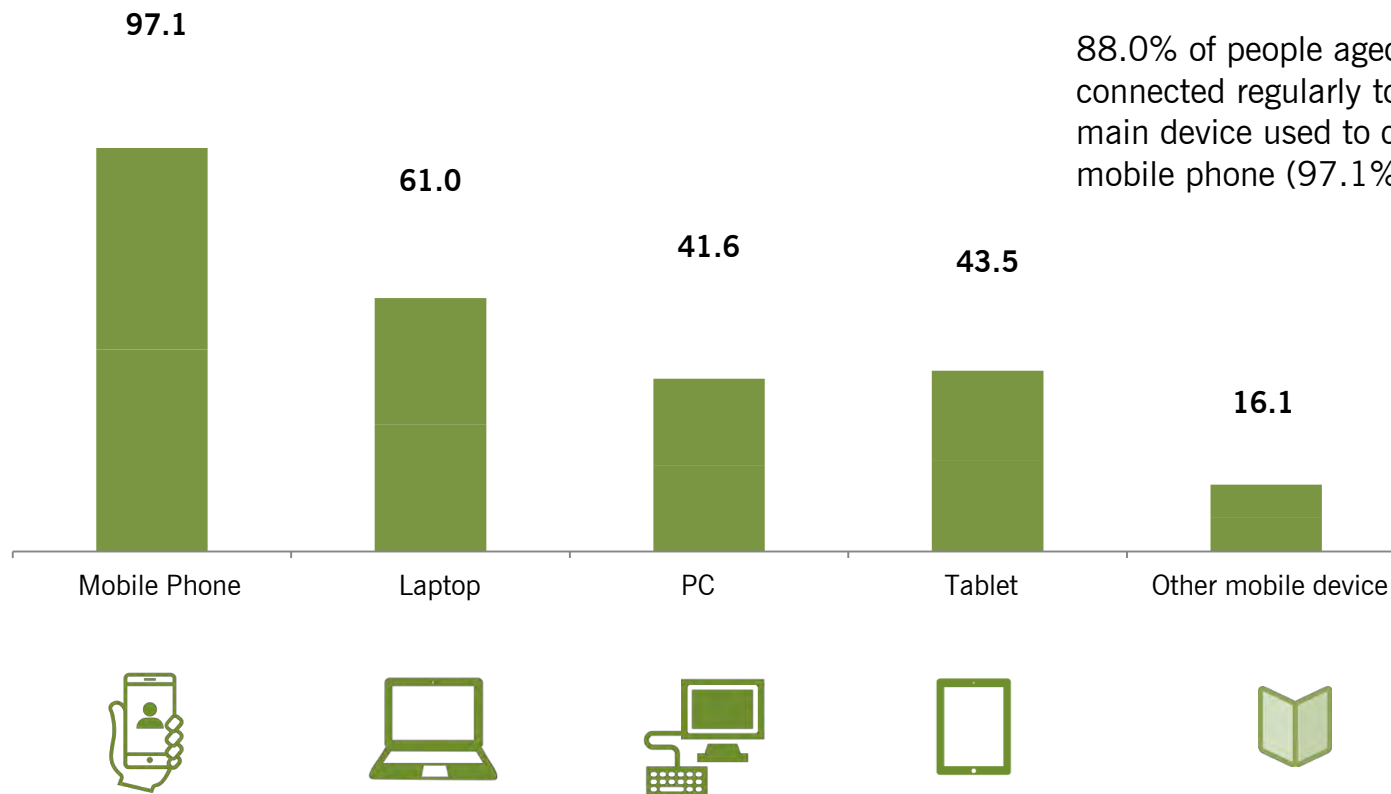
The frequency of internet use decreases as the age increases. No significant differences have been found between men and women.

Source: Idescat, based on [Enquesta sobre equipament i ús de tecnologies de la informació i de la comunicació a les llars](#) by INE. 2018

Internet penetration in Catalonia

Devices used to connect to the internet

(in %, out of all people aged 16 to 74 that have used the internet in the past 3 months)



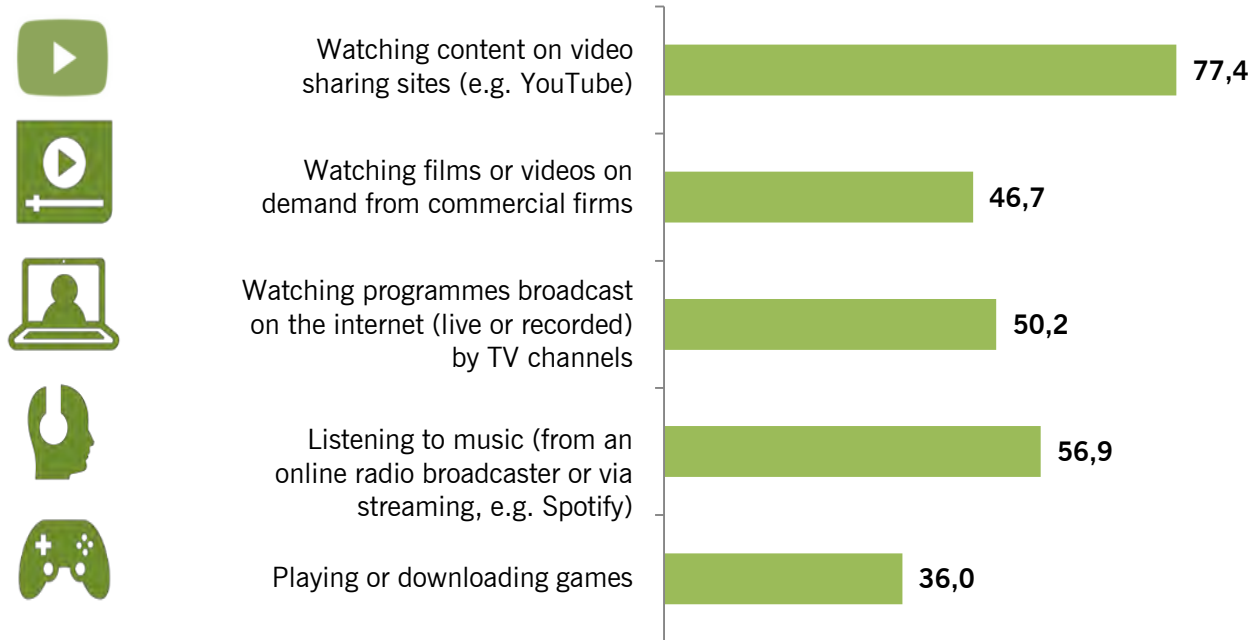
Note: the option “Other mobile devices” includes game consoles, e-readers, smart watches, etc.

Source: Idescat, based on [Enquesta sobre equipament i ús de tecnologies de la informació i de la comunicació a les llars](#) by INE. 2018

Internet use and entertainment

Use of entertainment-related internet services in Catalonia. 2018

(in %, out of all people aged 16 to 74 that have used the internet in the past 3 months)



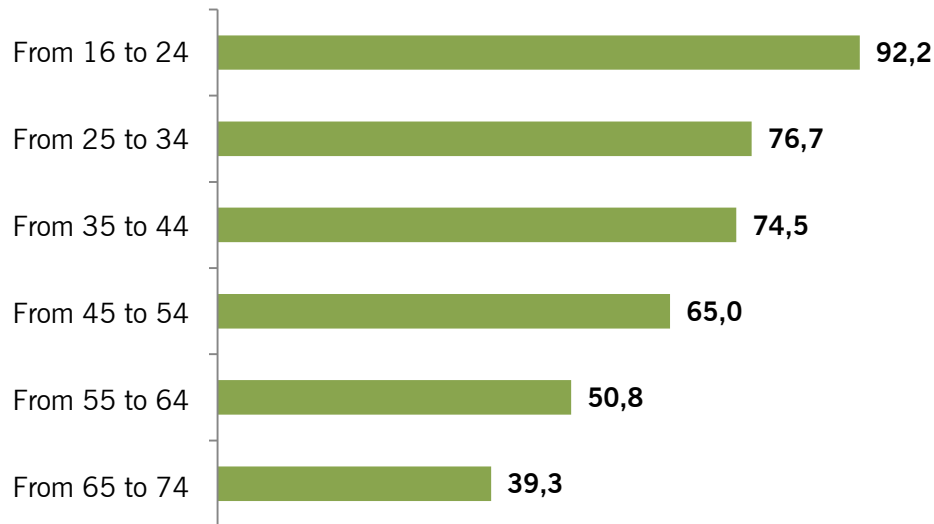
The most popular entertainment-related activity among internet users in Catalonia is the consumption of video content published on video sharing platforms, following by listening to music and watching TV programmes online.

Source: Idescat, based on [Enquesta sobre equipament i ús de tecnologies de la informació i de la comunicació a les llars](#) by INE. 2018

Social media participation

Social media participation. Catalonia. 2018

(in %, out of all people aged 16 to 74 that have used the internet in the past 3 months)



71.8% of female Catalan internet users take part in social media sites and, although fewer, 65.8% of male users.

By age, the 16-24 age group has a participation rate of 92.2%. It is also significant that 1 out of every 3 internet users aged over 65 uses social media sites.

Source: Idescat, based on [Enquesta sobre equipament i ús de tecnologies de la informació i de la comunicació a les llars](#) by INE. 2018

Consumption of audiovisual content

Hours of consumption of audiovisual content by device and age. Spain.

Age	Television		Computer		Tablet		Mobile	
	Work days	Weekends and holidays	Work days	Weekends and holidays	Work days	Weekends and holidays	Work days	Weekends and holidays
From 10 to 15	2.0	3.3	0.9	1.2	1.2	0.6	1.7	2.2
From 16 to 24	2.0	2.8	2.1	2.1	0.3	0.2	2.5	2.8
From 25 to 34	2.3	3.3	1.9	1.3	0.4	0.3	2.2	2.5
From 35 to 49	2.4	3.6	1.1	0.9	0.4	0.3	1.3	1.4
From 50 to 64	3.2	4.1	0.8	0.7	0.4	0.3	0.8	0.9
65 and over	4.2	4.5	0.6	0.5	0.2	0.2	0.5	0.4



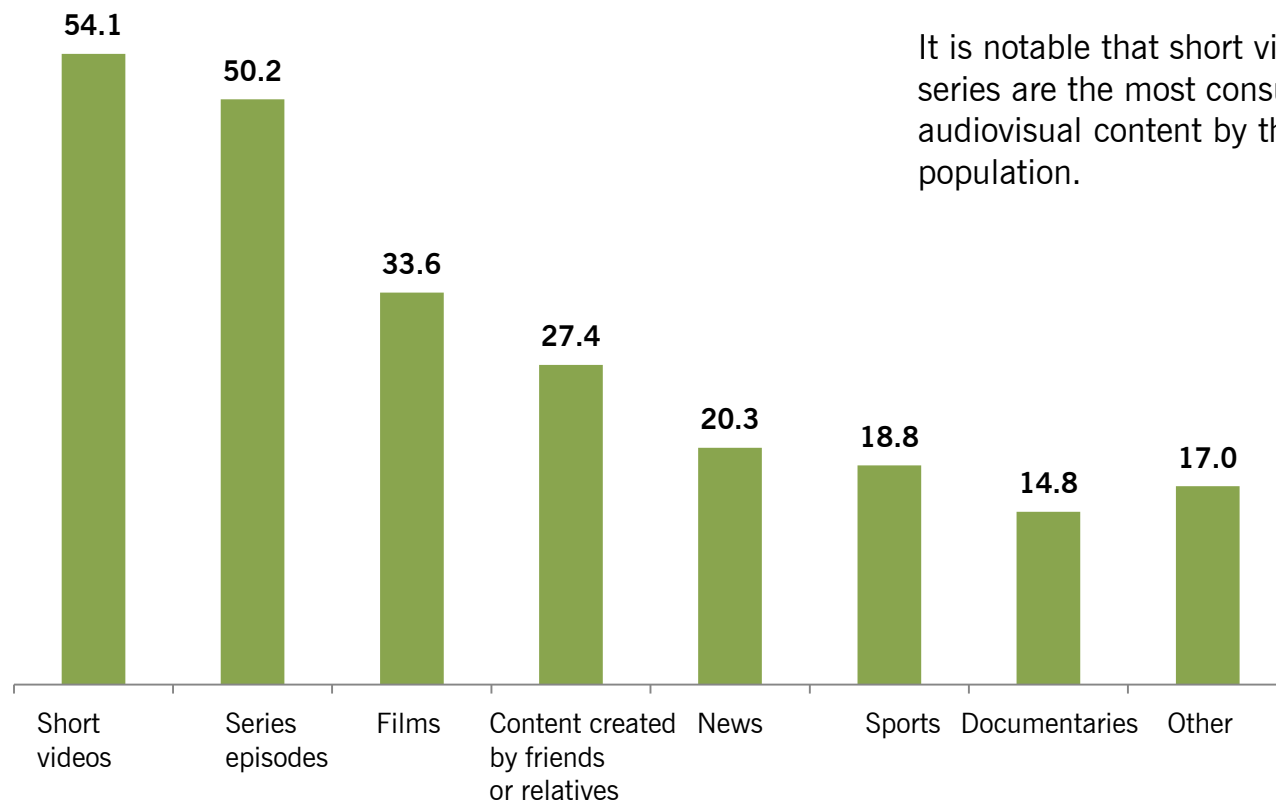
In general, the consumption of audiovisual content is growing at the weekend and during holidays, especially TV content, totalling between almost 3 and 4.5 hours, depending on the age group.

Young people aged 16 to 24 consume the most audiovisual content via mobile phone and not so much via the TV.

Source: CNMC. [Panel de Hogares de CNMC](#). Second quarter of 2018.

Consumption of online audiovisual content (1)

Consumption of online audiovisual content. Spain



It is notable that short videos and series are the most consumed audiovisual content by the Spanish population.



Source: CNMC. [Panel de Hogares de CNMC](#). Second quarter of 2018.

Consumption of online audiovisual content (2)

Subscriber platforms with online audiovisual content (in %, households)



13.4

NETFLIX

12.5



5.8



4.5



4.0



2.9



2.5



0.9



0.7

Other

0.6

In Spain, 1 out of every 3 households with internet access uses a subscriber platform, a growing trend over the past few years. Of these services, Movistar+ and Netflix are the most popular for consuming online audiovisual content.

The respondents prefer watching sports events and news programmes live, while they want to watch films and series on demand.

Source: CNMC. [Panel de Hogares de CNMC](#). Second quarter of 2018.



Note

e-Sports: a connected reality

Introduction (1)

DEFINITION:

e-Sports (*electronic sports*) refers to **multi-player video games**. The most important are **real-time strategy games** (RTS), rather than turn-based strategy), **fighting games**, **first person shooters** (FPS) and **multi-player online battle arenas** (MOBA).

The two main countries in terms of the e-Sport industry and number of followers are the US and China.

ECONOMIC VALUE:

In 2018, revenue from e-Sports (broadcasting rights, advertising, sponsors, merchandising, tickets and rights to publish videogames) totalled \$906 million (38.2% more than in 2017). In Spain this total was €14.5 million.

Total revenue is expected to reach \$1,650 million by 2021.

The US and Canada generated 38% of the total revenue in 2018, China 18% and South Korea 6%.



Introduction (2)

RECOGNITION:

In the **US**, e-Sports players are seen as **professional athletes**.

The **International Olympic Committee** (COI) recognises the sport's development.

Asiad 2018, organised by the Olympic Committee of Asia (OCASIA), included **e-Sports as a demonstration Olympic sport** with the following videogames:

- [League of Legends](#) (LoL), created by the company Riot Games, California, USA)
- [Pro Evolution Soccer](#) (PES) created by Konami, Japan).
- [Starcraft II](#) (created by Blizzard Entertainment, California, USA).
- [Hearthstone](#) (created by Blizzard Entertainment, California, USA).
- [Clash Royale](#) (videogame for mobiles, created by Supercell, Finland).
- [Arena of Valor](#) (videogame for mobiles, created by Wangzhe Rongyao, China).



e-Sports Olympic logo
(Asiad 2018,
Jakarta/Palembang)

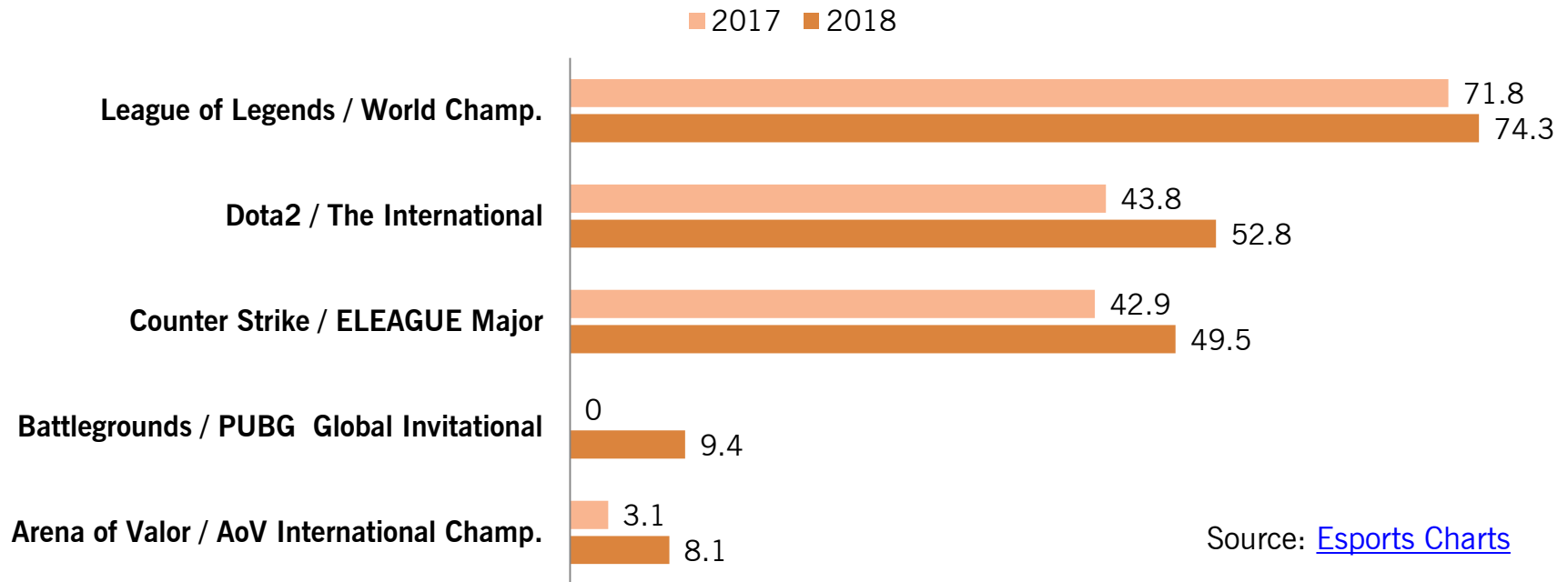
e-Sports are expected to be an official discipline at the Asiad 2022 games (Hangzhou, China).

Upcoming Olympic Games: Tokyo 2020 and Los Angeles 2024.



Main competitions and agents worldwide

Millions of viewing hours on Twitch and YouTube of the main e-Sport competitions



The main channel for e-Sports is [Twitch.tv](#), bought by Amazon in 2014 for \$970 million, the highest amount paid at that time for a tech firm. There is also [YouTube](#) but it's a long way behind Twitch.

The final of the [2018 World Championship](#) (*League of Legends*) was between [Fnatic](#) (London, UK) and the winner, [Invictus Gaming](#) (Shanghai, China), in November 2018. The audience was 99.6 million single users.

By comparison, the TV audience for the NFL Super Bowl final in the US in February 2018 was 103.4 million.

Main competitions and agents in Spain

The Spanish market is the 9th worldwide in terms of videogame turnover.

Videogame competitions are run by the **Liga de Videojuegos Profesional (LVP)** (Professional Videogamer League)

LVP organises the **Orange Superleague** for:

- League of Legends (in collaboration with Riot Games)
- Clash Royale
- Counter Strike



At the [III Barcelona Games World 2018](#), the final phase was held of the [I Iberian Cup](#) (Orange Superleague and the Portuguese league, LPLOF), organised by LVP and Riot Games.

LVP is the **leading global distributor of e-Sports in Spanish**. It distributes international competitions by others in Spanish, such as the League of Legends Championship Series, Paladins World Championship and the Rocket League Championship Series.



In 2016, **Mediapro** acquired a majority interest in Fandroid Entertainment, the company that manages LVP. In November 2018, Mediapro announced it was launching [U-Beat](#), an e-Sport OTT inspired by Twitch. The specialist channel Movistar eSports stopped broadcasting in December 2018, after two years of operation.



Note Sources: [International Olympic Committee \(COI\)](#), [Olympic Committee of Asia \(OCASIA\)](#), [World Economic Forum](#), [Forbes](#), [International e-Sports Federation \(IESF\)](#), [The Guardian](#), [Statista](#), [Esports Charts](#), [EfeEmpresas](#), [League of Legends](#), [Nielsen](#), [Asociación Española de Videojuegos \(AEVI\)](#), [Cuatrecasas](#), [Expansión](#).



Newsflashes

Newsflashes (1)

IAB Spain publishes the report *Top Tendencias Digitales 2019*

In December 2018, IAB Spain published the latest edition of this [annual report](#) that presents the 15 keys to business in digital advertising and communication in Spain, as well as showing the increased investment in e-Sports, the growing presence of social TV on social media sites, the emergence of connected TV platforms and the latest innovations in online advertising videos.

Netflix presents an interactive audiovisual format with *Black Mirror: Bandersnatch*

On 28 December 2018, Netflix broadcast a special episode from the *Black Mirror* series entitled [Bandersnatch](#). This was an interactive episode that allowed viewers, as they were watching, to take decisions that changed the plot for the protagonist and even the ending. Although this format is not new, it aroused a lot of interest since it was carried out as part of the very popular series *Black Mirror*, which attracts large audiences.

8tv cancels its news programmes

At the end of the year, the Grup Godó television channel decided to cancel its live news programmes: *8 al dia* and *La nit a 8tv*. In the second half of 2018, [8tv](#) audiences fell to a 0.8% share, according to Kantar Media.

3/24, National Communication Award

The 17th [Premis Nacionals de Comunicació 2018](#) were held on 10 December 2018.

CCMA's TV news channel, 3/24, won in the television category. Other winners were the comedy magazine programme *La Competència* by RAC1 (in the radio category); the newspaper *Núvol* (digital media); the news photographer Tino Soriano (press); the local business group Corisa Media Grup and the Catalan firm *Wallapop* (advertising). Journalist Pepi Rafel received a special award for all his work in the world of local communication.

CAC research awards

The Catalan Audiovisual Council has published the [winners](#) of the 30th CAC Awards for research into audiovisual communication. Isadora García has won first prize with her doctoral thesis entitled "[La adaptació de formats en televisió: los remakes transculturales de series de ficción](#)". Her research focused on the impact a specific cultural context can have on the narrative when a series is being adapted. Second prize has gone to the report "[Serveis d'accessibilitat sensorial a les televisions catalanes: situació actual, necessitats i propostes de futur](#)", produced by Sara Rovira and Irene Tor.

Newsflashes (2)

 **Cadena SER produces a broadcaster in Catalan**
[SERCat](#) came into operation on 15 October 2018, a new proposal by Cadena SER that doubles the radio broadcasts on offer in Catalonia. The main attraction of SER Catalunya is the morning news magazine programme *Aquí, amb Josep Cuní*. The broadcaster's programming is completed with programmes that were already distributed as regional broadcasts by Ràdio Barcelona-Cadena SER.

 **TV3 and IB3 come together to launch Bon dia TV**
On 27 November 2018, the public TV broadcasters in Catalonia and in the Balearic Islands started up [Bon dia TV](#), a new, free VoD platform. Through this platform, TV3 and IB3 aim to raise awareness of their own programming in Catalan. The platform includes documentaries, series, films and informative programmes, among other content.

 **Loves TV starts up**
Last November, RTVE, Mediaset and Atresmedia started up a new, free VoD platform as a joint effort to tackle the increase in subscriber VoD content. *Loves TV* provides the content from the previous 7 days broadcast by any of the three communication groups.

 **Roger Loppacher, appointed President of MNRA**
On 17 November, the President of the Catalan Audiovisual Council, Roger Loppacher, was appointed [President](#) of the Mediterranean Network of Regulatory Authorities (RIRM in French) at its 20th plenary session. This network is made up of 26 media regulatory authorities from 22 countries around the Mediterranean and its main aim is to establish a framework for dialogue, exchanging information and research into media regulation.

 **ERGA publishes a new report on media plurality in the EU**
As part of its [10th meeting](#), ERGA approved the report [Internal Media Plurality in Audiovisual Media Services in the EU: Rules & Practices](#). This report is divided into four parts that analyse the current state of media plurality in the European Union given the recent changes in the media panorama.

 **Good Media Literacy practices in Europe**
The Council of Europe has published a [Report](#) on the regulatory authorities that carry out media literacy projects in their respective countries. The [eduCAC](#) programme by the Catalan Audiovisual Council has been presented by the report as an example of good practices.

BIAC. No. 12 – Third four months of 2018

Main sources:

- CAC: The Council's own data.
- Kantar Media: Area of Catalonia. Data obtained using a people meter for individuals aged 4 and upwards.
- EGM: Data from the 3rd sweep of 2018. Period October-November 2018. Area of Catalonia.
- CNMC: CNMC Panel of Households. Second half of 2018.
- Iconography: *Noun Project*, *Freepik*

Bibliographic citation:

CATALAN AUDIOVISUAL COUNCIL. *Butlletí d'informació sobre l'audiovisual a Catalunya* (Newsletter on the Media in Catalonia) (BIAC). No. 12. Third four months of 2018. Barcelona: CAC, January 2019. <www.cac.cat>