



Butlletí d'informació sobre l'audiovisual a Catalunya

(Newsletter on the Media in Catalonia)

Third four months of 2019
Number 15. January 2020

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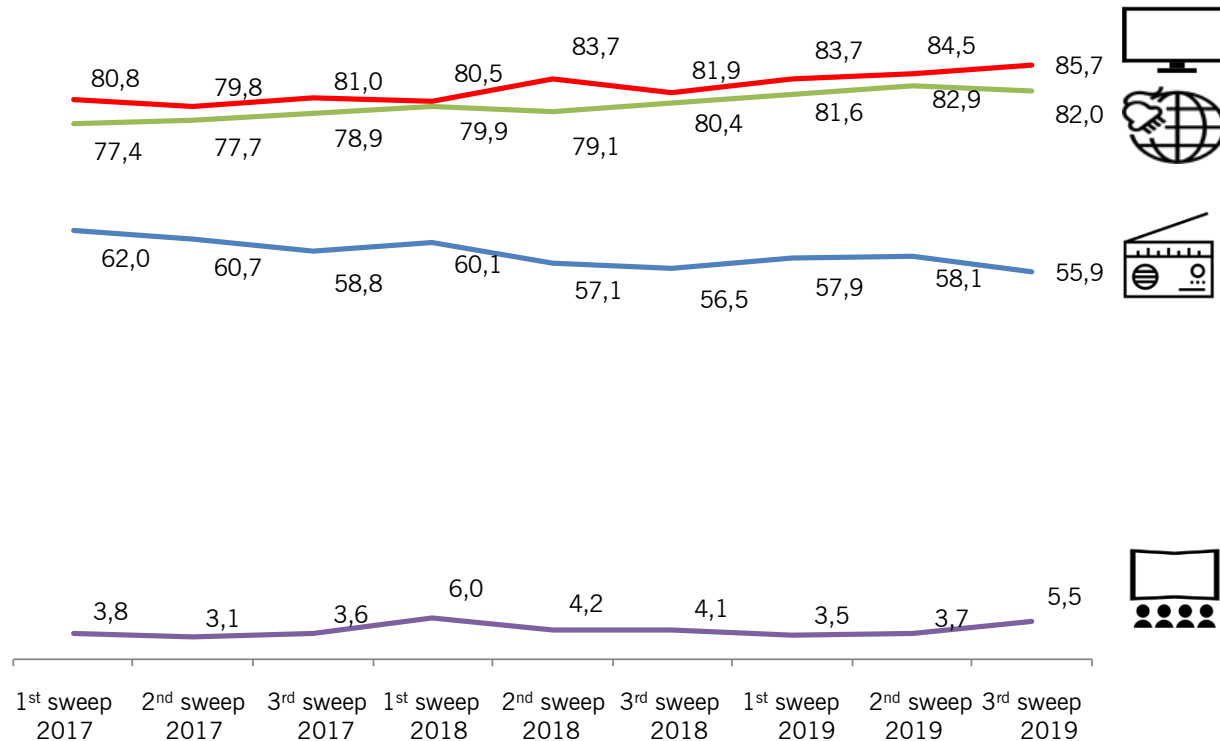
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Media penetration in Catalonia (1)

Media penetration in Catalonia (% of total population)



CONSUMPTION IN CATALONIA

In 2019 average TV consumption was 3 hours 2 minutes.

Every day, from Monday to Sunday, people listen to the radio for an average of 1 hour 39 minutes.

Note: 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 2019.

Media penetration in Catalonia (and 2)

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



GENDER / AGE	TELEVISION	RADIO	INTERNET	CINEMA
Total population	85.7	55.9	82.0	5.5
Men	86.0	60.4	85.4	5.9
Women	85.4	51.7	78.8	5.2
14 to 19	75.3	42.7	94.7	8.5
20 to 24	80.5	51.6	97.4	9.4
25 to 34	77.9	54.5	95.4	9.1
35 to 44	83.7	63.7	96.5	7.1
45 to 54	85.4	62.7	91.4	3.7
55 to 64	89.6	60.4	79.7	2.9
65 and over	94.3	47.8	47.8	3.4

Source: EGM – Catalonia data – 3rd sweep 2019.



Breakdown of TV channels in Catalonia

 Canal TV  Commercial TV  Public TV



Catalan households receive an average of 43 open TV channels: 9 Catalan, 32 Spanish and the local ones.

**92 TV channels
openly broadcast**

7 out of 10 channels are commercial and half of them broadcast locally.

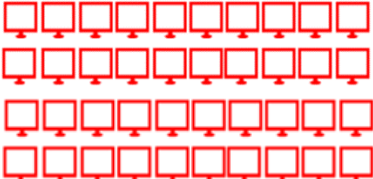
TV supply by service zone

9 **Catalan** channels 5 public 
4 commercial 



32 **Spanish** channels 7 public 
25 commercial 



51 **local** channels 11 public 
40 commercial 



Note: BIAC uses the term *channel* (usual term) to refer to the 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 2019.

Catalan TV channels

Public TV Commercial TV Language used

By area, ownership, supply and language used

Catalan



Source: Catalan Audiovisual Council. December 2019.

Spanish TV channels

Public TV Commercial TV Language used

By area, ownership, supply and language used

Spanish

32 Spanish channels	7 public 22%	Corporación de Radio y Televisión Española (CRTVE) 1 1 HD 2 24h clan tdp tdp HD
	25 commercial 78%	Atresmedia Televisión     neox nova MEGA A3S Mediaset España   cuatro cuatro HD      NET Televisió   13 Televisión TRECE Grupo Secuoya ten VEO Televisión   Real Madrid Televisión  Real Madrid TV Grupo Kiss Media 

Note: CRTVE broadcasts content in Catalan in Catalonia via the channels La 1, La 2 and Canal 24 Horas.
The commercial TV channels are organized into Communication groups.

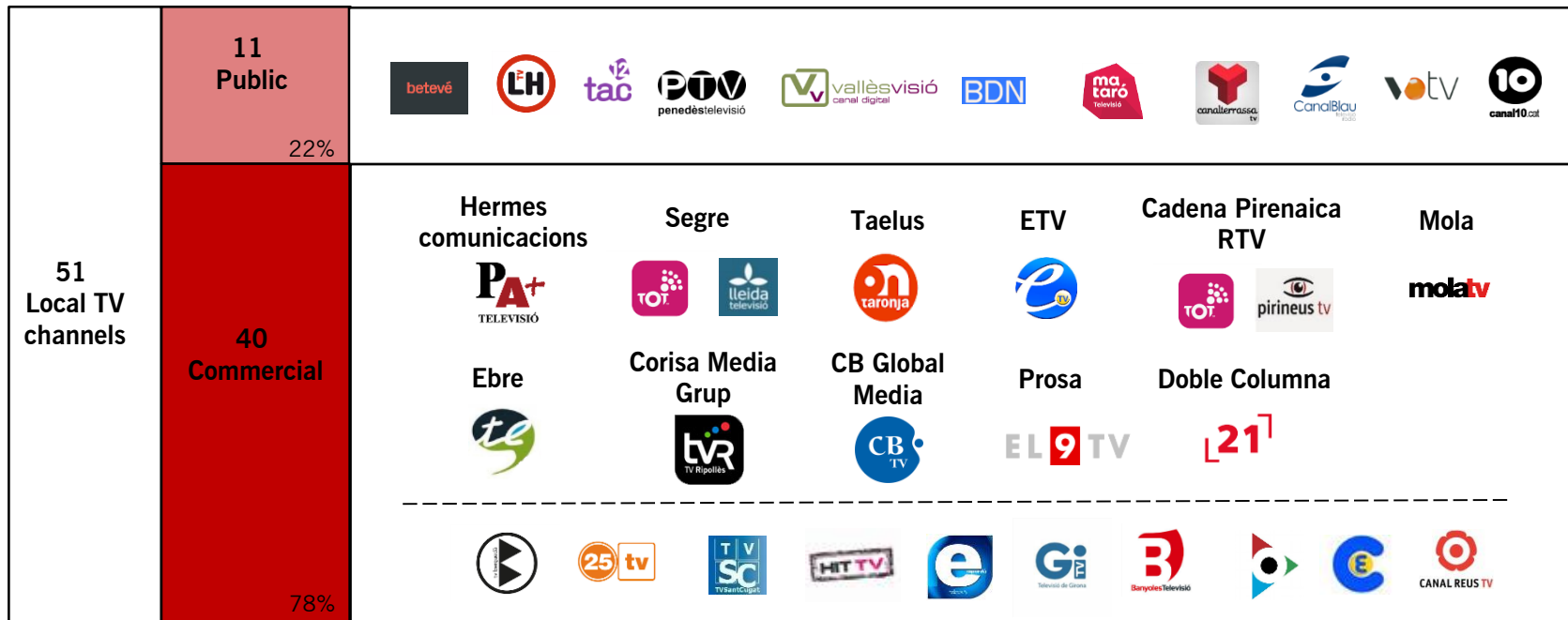
Source: Catalan Audiovisual Council and the corporate websites of audiovisual communication service providers. December 2019.

Local television (1)

Public TV Commercial TV Language used

By area, ownership, supply and language used

Catalan



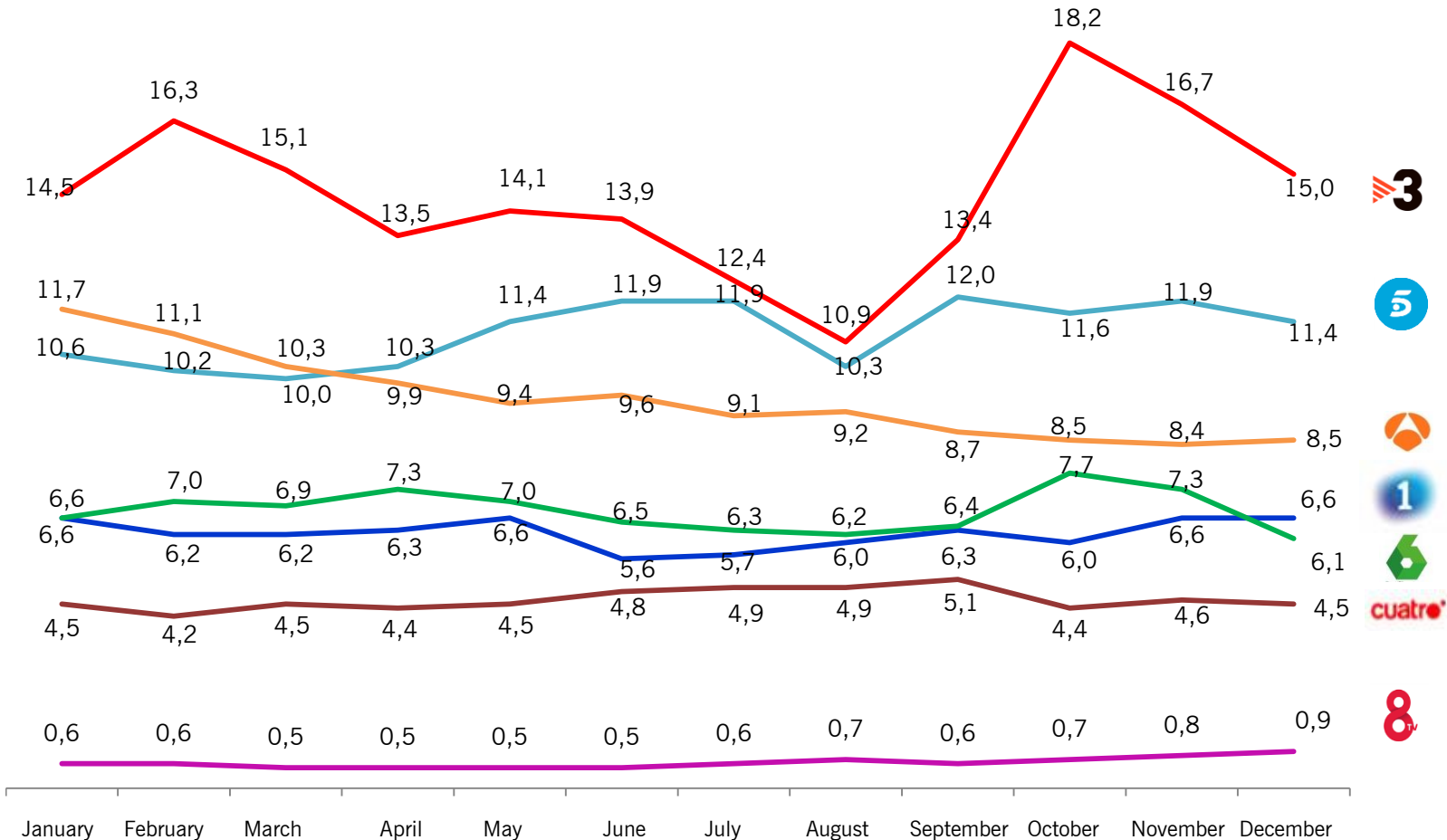
Note: The commercial TV channels are organized into Communication groups, if applicable.
On December 31 the El Punt Avui Televisió channels stopped broadcasting.

Source: Catalan Audiovisual Council. December 2019.

Television audiences (1)

Monthly trend in the share of the main channels in Catalonia

(in %, from January 2019 to December 2019)



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: [Barlovento Comunicación](http://barlovento.comunicacion.es).

Television audiences (2)

Monthly share per channel in Catalonia

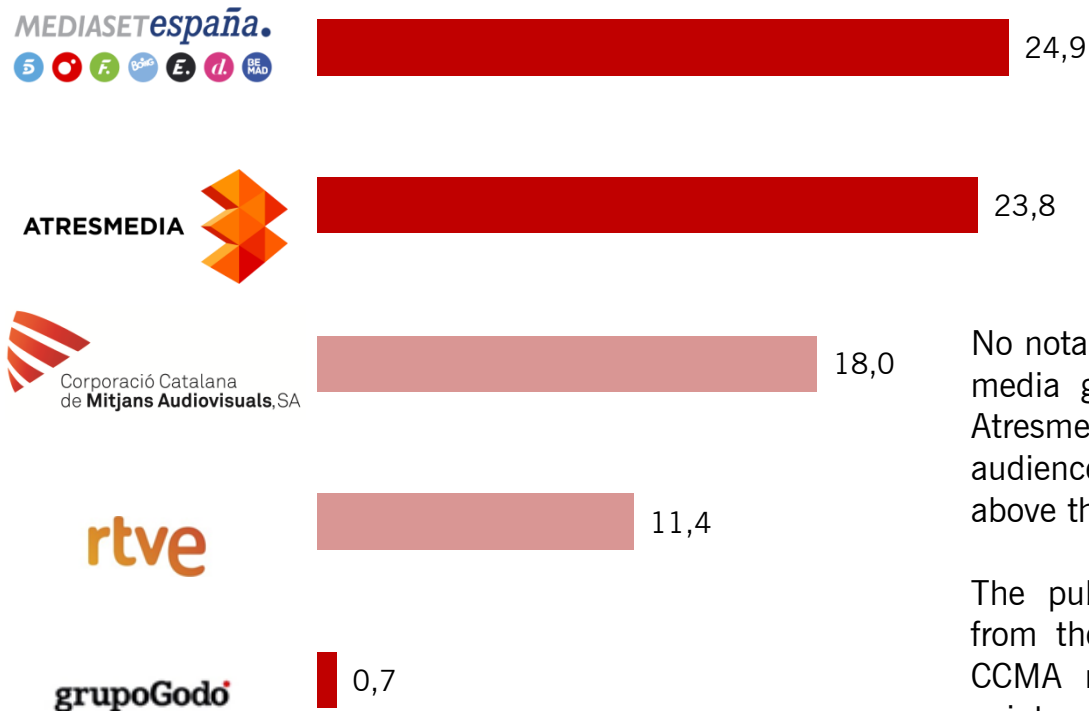
(in %, from January to December 2019, in descending order according to December's ranking)

	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
TV3	14.5	16.3	15.1	13.5	14.1	13.9	12.4	10.9	13.4	18.2	16.7	15.0
Telecinco	10.6	10.2	10.0	10.3	11.4	11.9	11.9	10.3	12.0	11.6	11.9	11.4
Antena 3 TV	11.7	11.1	10.3	9.9	9.4	9.6	9.1	9.2	8.7	8.5	8.4	8.5
La1	6.6	7.0	6.9	7.3	7.0	6.5	6.3	6.2	6.3	6.0	6.6	6.6
laSexta	6.6	6.2	6.2	6.3	6.6	5.6	5.7	6.0	6.4	7.7	7.3	6.1
Cuatro	4.5	4.2	4.5	4.4	4.5	4.8	4.9	4.9	5.1	4.4	4.6	4.5
Energy	3.2	3.1	2.9	3.0	2.9	3.1	3.2	4.1	3.1	2.6	2.6	2.8
Factoría de Ficción	2.6	2.6	2.7	2.9	2.8	3.0	3.0	3.5	2.9	2.3	2.6	2.6
La2	2.7	2.7	2.6	2.7	3.2	3.3	3.3	3.2	2.2	2.2	2.2	2.5
Neox	2.0	1.7	2.0	1.9	1.9	2.0	2.3	2.5	2.9	2.2	2.2	2.4
Atreseries	2.2	2.3	2.7	2.7	2.3	2.4	2.4	2.5	1.7	2.0	2.1	2.4
TRECE	2.2	2.1	2.0	2.0	2.1	2.2	2.4	2.4	2.0	1.8	1.9	2.1
Divinity	1.8	1.7	1.8	2.0	1.8	1.7	2.0	2.4	1.9	1.6	1.8	1.9
DMax	1.8	1.7	1.7	1.7	1.7	1.8	1.9	2.2	1.7	1.6	1.7	1.9
Paramount Network	1.7	1.6	1.8	1.9	1.8	1.5	1.6	1.9	2.1	1.9	1.7	1.8
Clan	1.4	1.4	1.5	1.4	1.3	1.4	1.4	1.7	1.8	1.5	1.3	1.6
3/24	1.5	2.6	3.1	3.0	2.4	2.0	1.7	1.6	2.1	2.8	2.1	1.5
Mega	1.4	1.3	1.5	1.6	1.5	1.7	2.0	1.7	1.4	1.4	1.3	1.3
Dkiss	1.8	1.5	1.5	1.7	1.6	1.7	1.7	1.5	1.3	1.1	1.3	1.3
Nova	1.0	1.1	1.1	1.0	1.3	1.3	1.3	1.5	1.5	1.2	1.2	1.2
Boing	0.8	0.7	0.7	0.8	0.8	0.9	1.0	1.0	1.0	0.9	0.9	1.1
Disney Channel	0.9	0.8	0.7	0.8	0.9	1.0	1.0	1.0	1.0	1.0	0.9	1.0
TEN	0.7	0.8	0.7	0.7	0.6	0.8	0.6	0.8	0.5	0.4	0.5	1.0
8tv	0.6	0.6	0.5	0.5	0.5	0.5	0.6	0.7	0.6	0.7	0.8	0.9
Super3/33	0.7	0.6	0.5	0.6	0.6	0.6	0.6	0.7	0.6	0.5	0.6	0.7
Gol	0.5	0.3	0.4	0.5	0.6	0.5	1.4	0.7	0.6	0.5	0.5	0.6
24h	1.0	0.9	0.9	0.9	0.9	0.8	0.8	0.7	0.7	1.1	1.0	0.6
BeMad	0.6	1.0	0.9	1.0	0.8	0.7	0.6	0.6	0.5	0.4	0.5	0.5
Teledeporte	0.5	0.5	0.7	0.7	0.6	0.5	0.4	0.5	0.9	0.5	0.2	0.3
Esport3	0.4	0.7	0.5	0.4	0.4	0.5	0.5	0.5	0.6	0.5	0.5	0.3
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: [Barlovento Comunicación](#).

Television audiences (and 3)

Audience share in Catalonia (in % and by group, average 2019)



No notable changes were observed in the main media groups during the year. Mediaset and Atresmedia concentrate half of the television audience in Catalonia. The first, one point above the second.

The public television remains at a distance from the results of the commercial one. The CCMA represents 18% of the audience, six points away from Atresmedia. Further away are the CRTVE channels, with 11%.

Font: Elaboració pròpia a partir de dades de [Barlovento Comunicación](#).



Breakdown of radio broadcasters in Catalonia

Public
Commercial

262 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

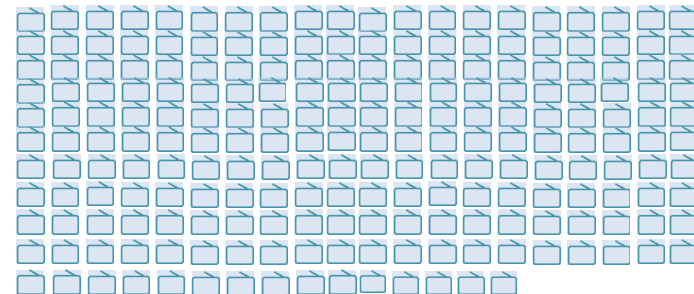
4 public
8 commercial

19 **Spanish** broadcasters

5 public
14 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 (Catalan and Spanish commercial FM) and the Ministry of the Economy and Business (Spanish public FM). December 2019.

Public radio

 Language used

By service zone and broadcast language

224 Public broadcasters	4 Catalan broadcasters	CCMA  Cat     Catalan
	5 Spanish broadcasters	CRTVE       Spanish Catalan (Ràdio 4)
	215 Local broadcasters	(examples)               Català

Source: Catalan Audiovisual Council (Local FM), Corporació Catalana de Mitjans Audiovisuals (Catalan FM) and Ministry of the Economy and Business (Spanish FM). December 2019.

Commercial radio

 Language used

By service zone and broadcast language

38 Commercial broadcasters	8 Catalan broadcasters	          Catalan
	14 Spanish broadcasters	                   Spanish (excepte regional sections)
	16 Local broadcasters	                Catalan

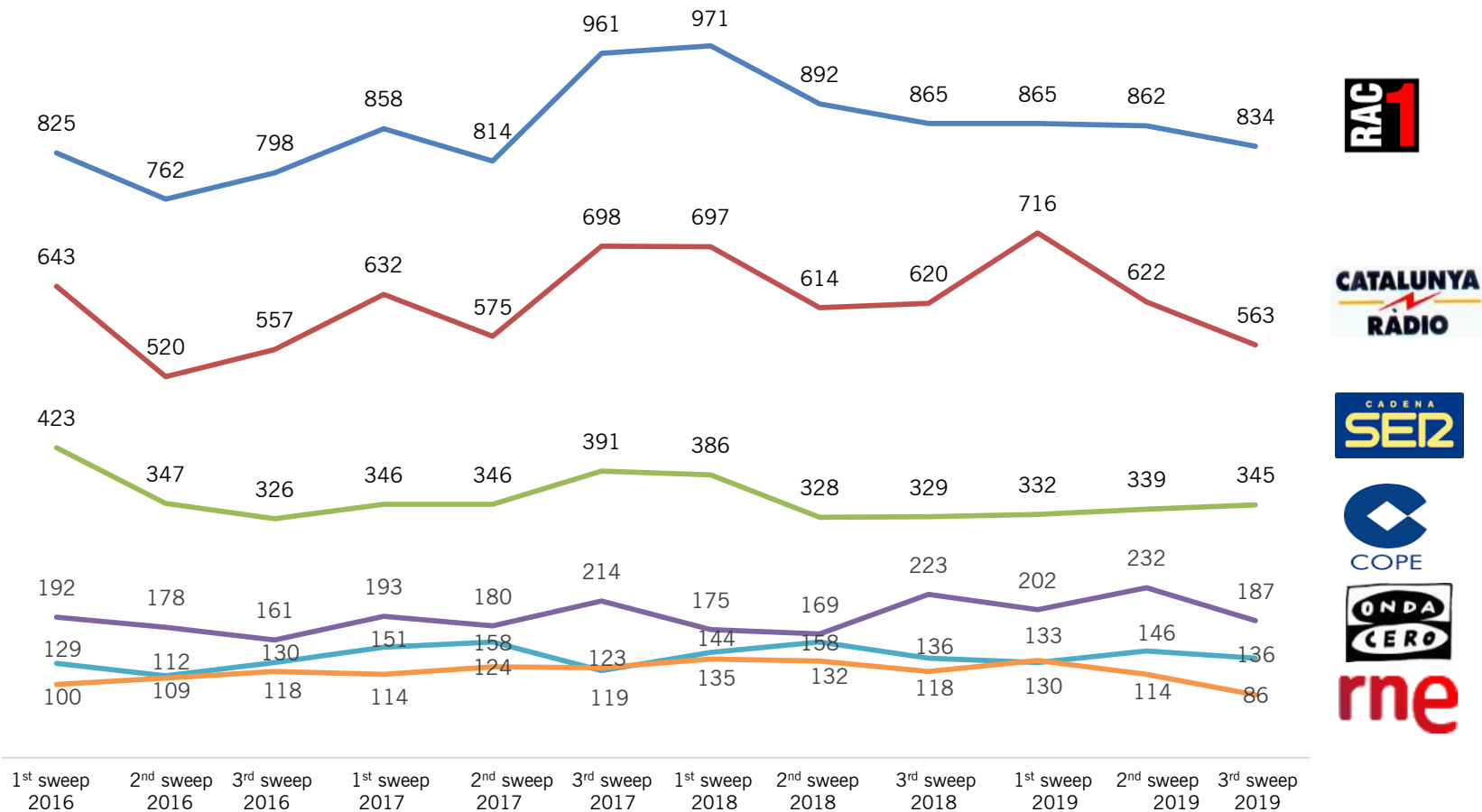
Note: Prisa changes the name and image of Máxima FM, which from October 9th will be called Los40 Dance.

Source: Catalan Audiovisual Council. December 2019.

Radio audiences (1)

General radio ranking. Audiences

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

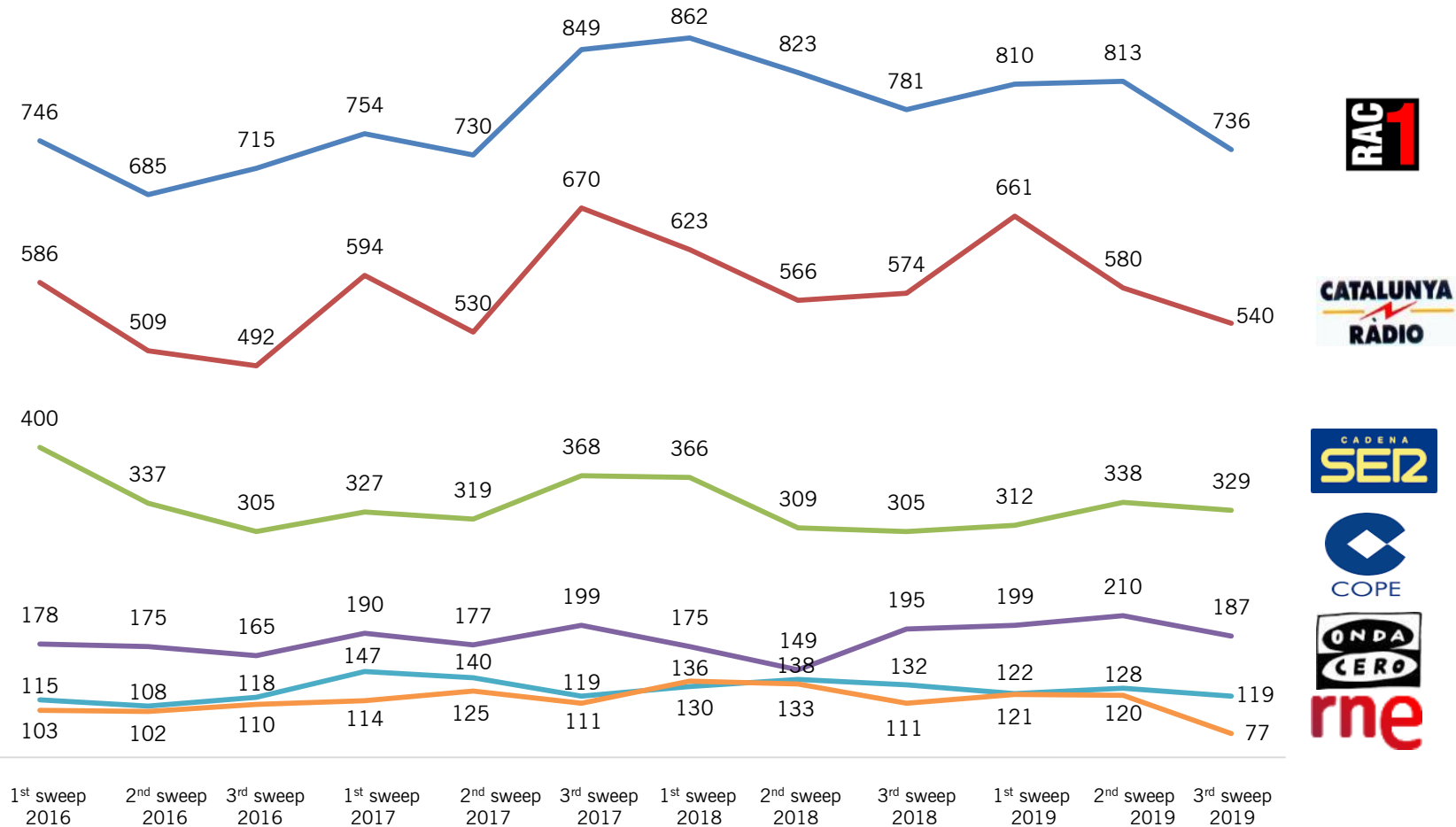


Source: EGM – Catalonia data – 3rd sweep of 2019.

Radio audiences (2)

General radio ranking. Audiences

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

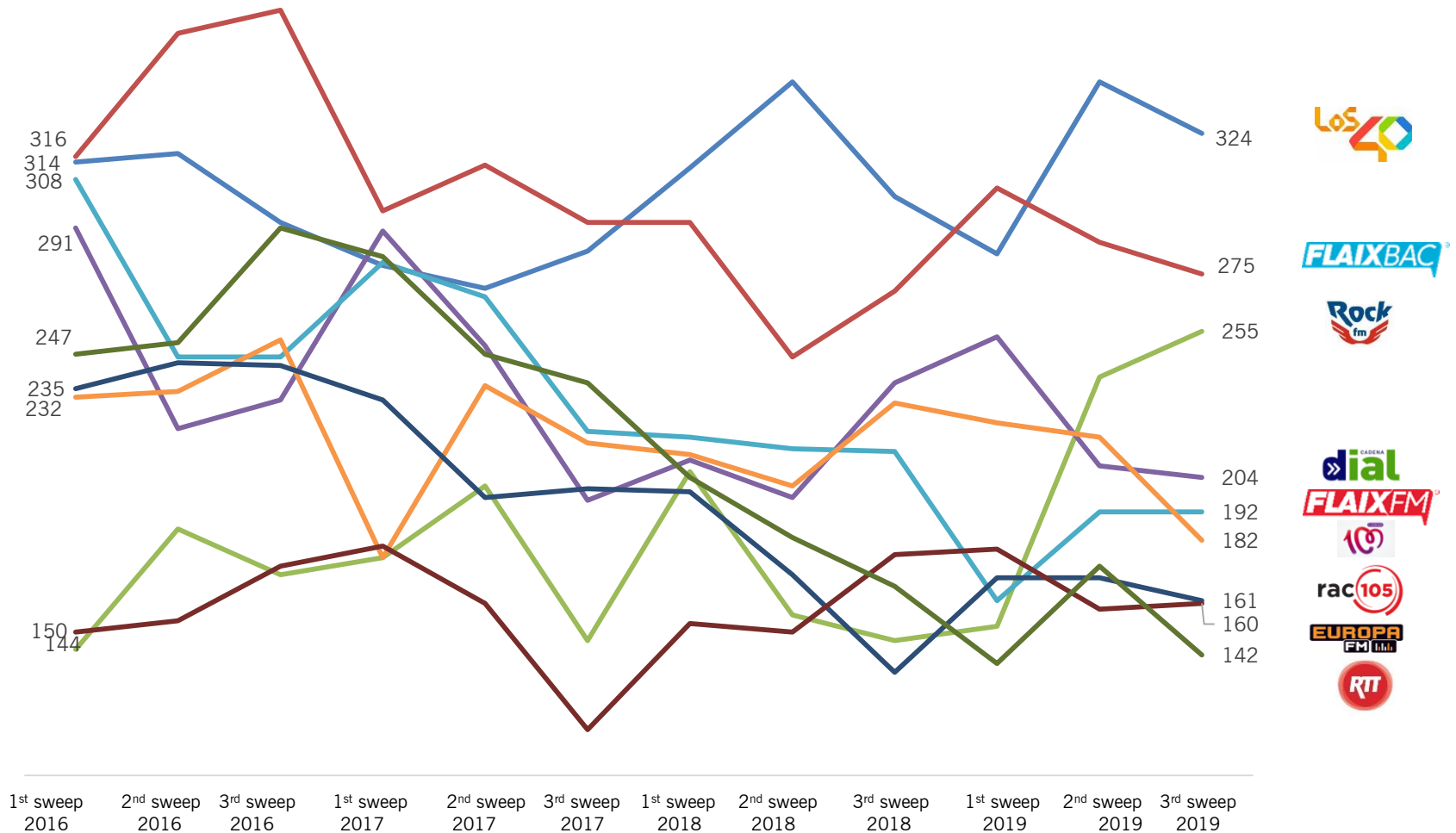


Source: EGM – Catalonia data – 3rd sweep of 2019.

Radio audiences (3)

Music radio ranking. Audiences

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

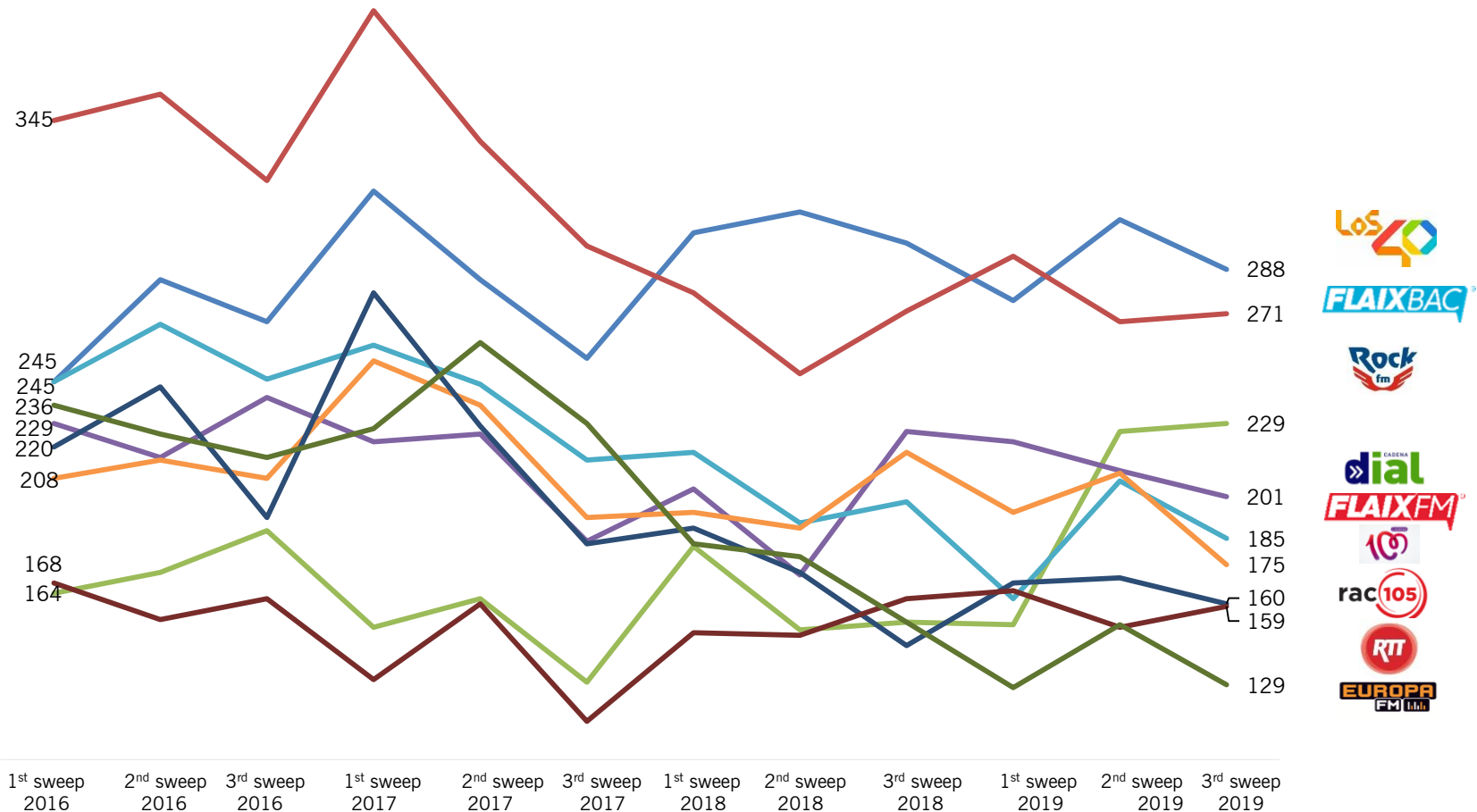


Source: EGM – Catalonia data – 3rd sweep of 2019.

Radio audiences (4)

Music radio ranking. Audiences

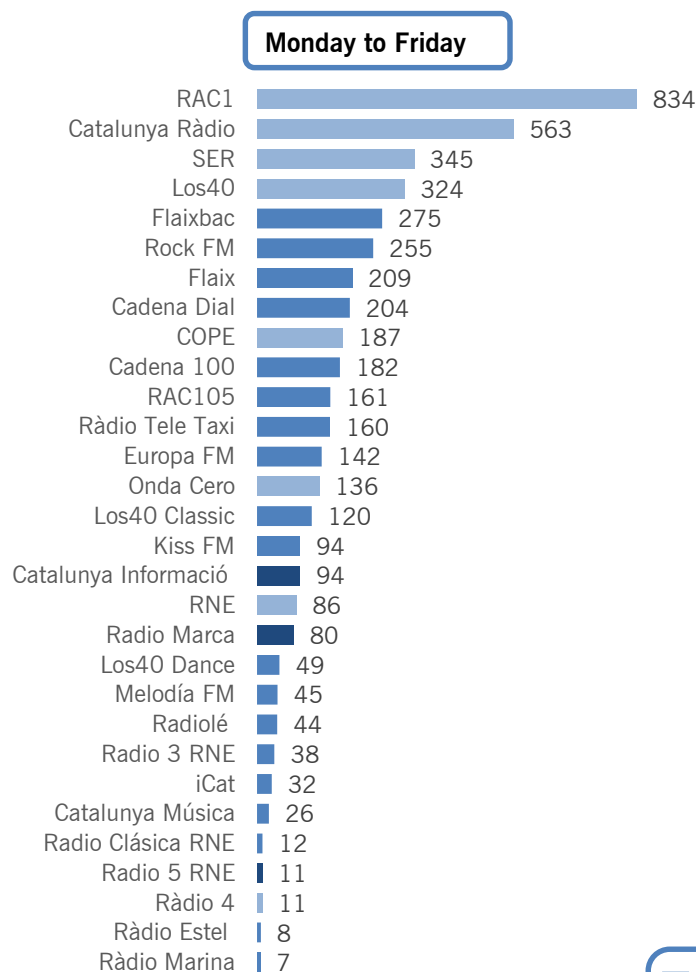
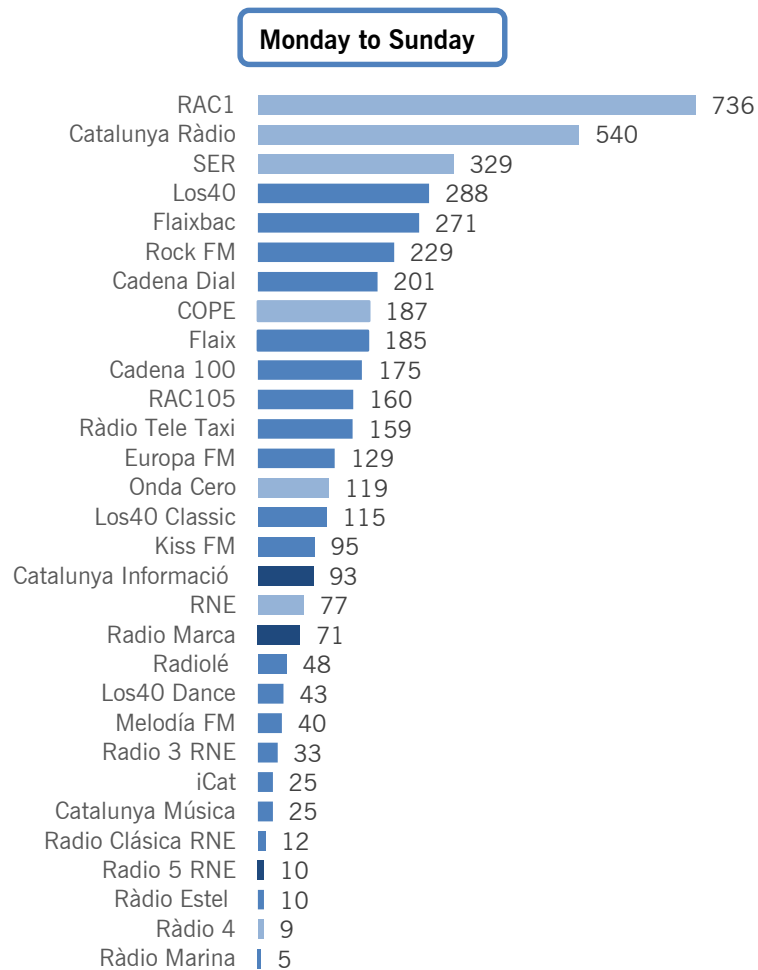
(trend in the last twelve sweeps, in thousands, day prior to interview, from Monday to Sunday)



Source: EGM – Catalonia data – 3rd sweep of 2019.

Radio audiences (5)

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

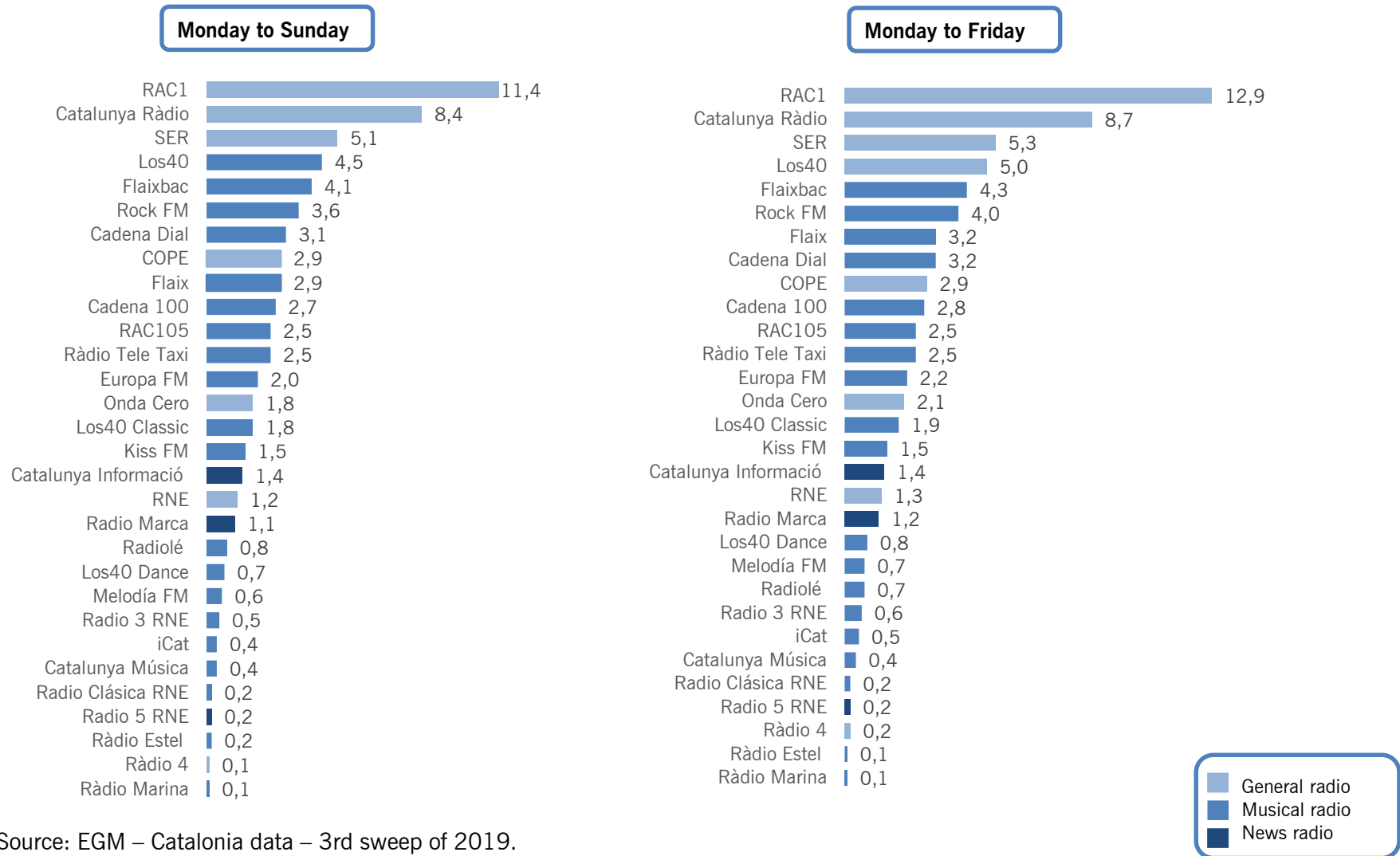


■ General radio
■ Musical radio
■ News radio

Source: EGM – Catalonia data – 3rd sweep of 2019.

Radio audiences (and 6)

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



Source: EGM – Catalonia data – 3rd sweep of 2019.

Radio audiences by time slot

In Catalonia, every day 2,030,000 people listen to general radio stations and, of these, 1,596,000 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
	834 (862)	631 (656)	323 (327)	293 (297)	201 (182)
	563 (622)	396 (453)	177 (207)	136 (156)	143 (112)
	345 (339)	234 (227)	97 (74)	76 (83)	125 (125)
	187 (232)	108 (161)	34 (43)	22 (41)	100 (85)
	136 (146)	81 (95)	39 (47)	35 (32)	35 (35)
	86 (114)	54 (69)	34 (40)	15 (11)	30 (43)

Source: EGM – Catalonia data – 3rd sweep of 2019.



Internet

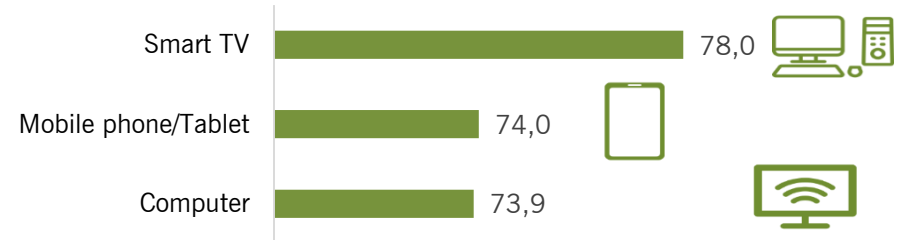
Digital media content (1)

- **Digital media content** can be consumed using different devices with internet access: Smart TV, analogue TV connected to a computer, laptop or console, set-top boxes and other devices.

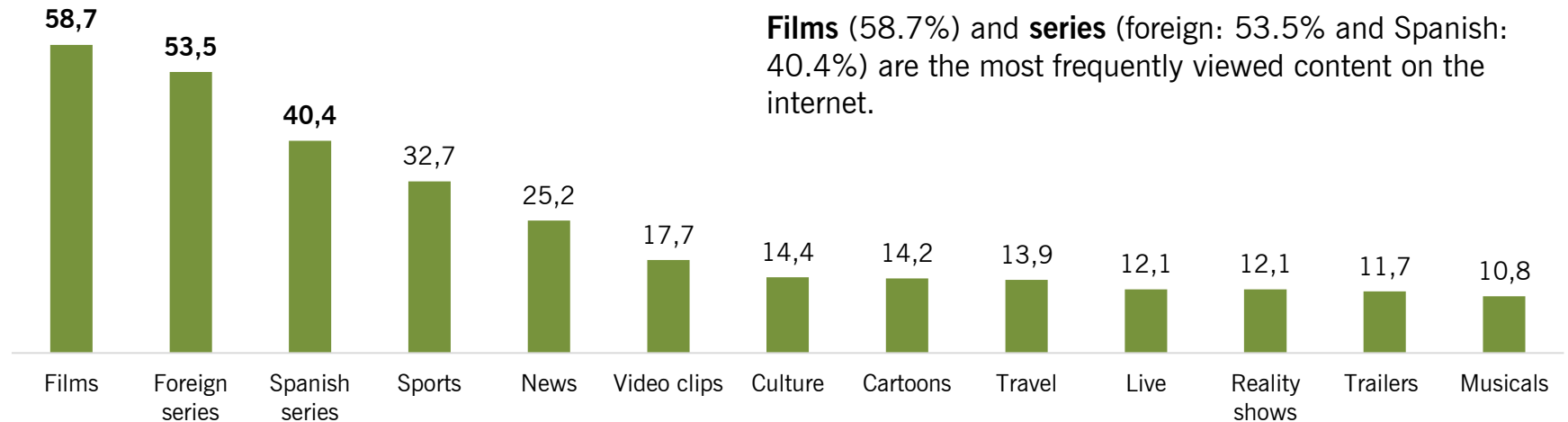


Most widely used devices

78% of internet users access digital media content via a Smart TV.



Most frequently watched media content



Films (58.7%) and **series** (foreign: 53.5% and Spanish: 40.4%) are the most frequently viewed content on the internet.

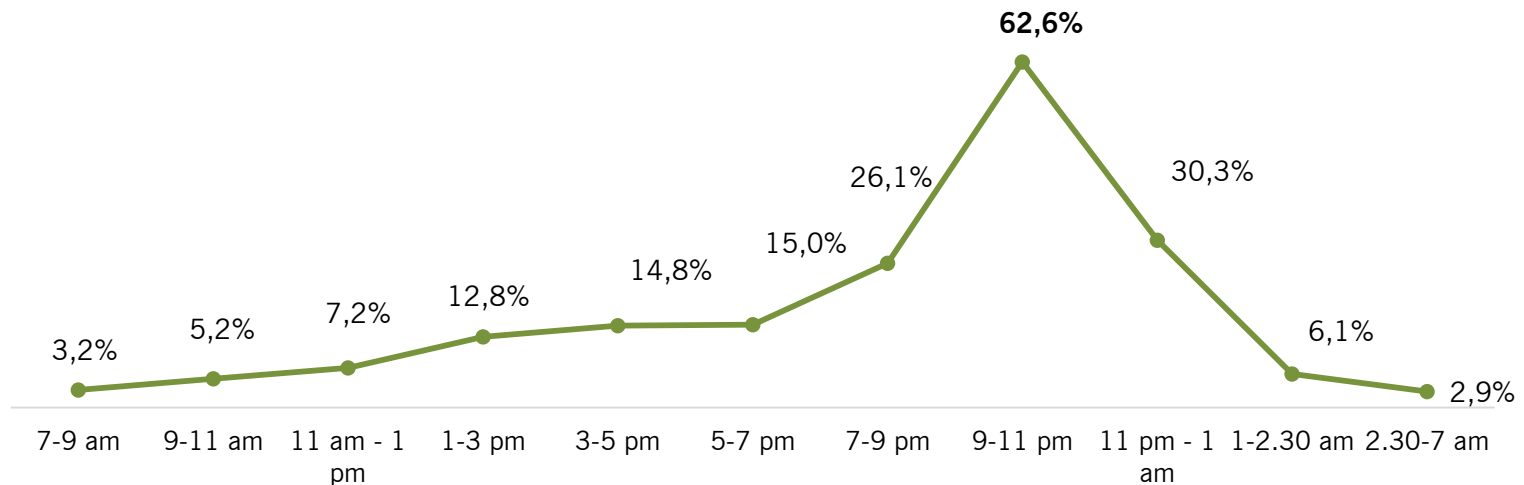
Source: IAB Spain. [Estudio de TV Conectada 2019](#). Scope: Spain. 1,000 interviews with internet users aged 16 and over.

Digital media content (2)



Habits and consumption of digital media content

- ✓ The average daily consumption of digital media content is **134 minutes/day**.
- ✓ The **prime time** for digital media content digital is **from 9 pm to 11 pm**
- ✓ Prime time is more **appreciable** when consumption is via a **Smart TV**. The consumption curve is not so steep when other devices are used (e.g. mobile phone).



Source: IAB Spain. [Estudio de TV Conectada 2019](#).

Spain's Smart TV market



According to data from the General Media Study (*Estudio General de Medios* or EGM) of April/May 2019, **83.6%** of the population connects to the internet: **39.8 million** people aged 14 and over in Spain.



57.5% of internet users have a Smart TV: **19.1 million** people aged 16 and over.



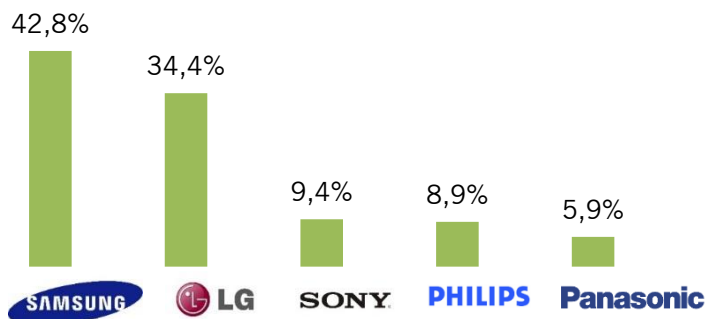
Of these, almost **half** (49%) **regularly** access the internet via a TV set.



The average profile of people who own and connect via a Smart TV is an **employed male aged 25 to 54**.



Penetration of major manufacturers in the Smart TV market. Spain 2019



Source: IAB Spain. [Estudio de TV Conectada 2019](#).



Note:

Marketing with influencers

Definition and types of influencers

Influencers have an impact on the internet communities where they publish content. This capacity to stimulate conversation, engage people and promote interaction means that a lot of companies are interested in the influencer phenomenon. The digital marketing sector is learning how to deal with this new and growing type of communication.



Non-native: Although they are also active on social media, their reputation comes from previous activities and/or career.

By source:

Native: Famous for their activity on social media and their main asset is the content they post.



By the network where their presence is greatest:



Instagrammer

Importance of ephemeral audiovisual content. Stories expire 24 hours after being posted.



YouTuber

Audiovisual content lasts longer and is more easily accessible by non-followers.



Twitterer

Importance of text, even when combined with audiovisual content. Favours external links.

By scope:

The scope affects the price of sponsored content but **it's not proportional**. A small audience tends to be **more homogeneous** and can therefore be more effective in terms of reaching a specific target. According to [IAB Spain](#), there are different categories of **Instagrammer** depending on the scope:

 Nano (<10k)

 Micro (10k<50k)

 Mig (50k<250k)

 Macro (250k<1M)

 Top (>1M)

Source: IAB Spain. [Libro Blanco de Marketing de Influencers](#) (2019)

Legislation and standards



Identifying advertising

[Act 34/2002, on Information Society and electronic commerce services](#): Commercial communications must be “**clearly identifiable** as such”.

[General Advertising Act 34/1988](#): Identification must be maximised when the target is **minors**.



Copyright

An influencer may be involved as:

- An **author**
- An **interpreter**
- A mere **participant**

The type of participation determines the content's monetisation and copyright issues.



Taxation

The most typical situation is for influencers to be **self-employed**.

The [doctrine](#) established by Spain's Supreme Court is that there's no need to register as self-employed when income is sporadic and **does not exceed the threshold of the national minimum wage**.



The British regulator, the **Advertising Standards Authority (ASA)**, has published a [guide for influencers](#). This document specifies the criteria for identifying advertising and recommends using **labels such as “ad” or “advert”** to make it “clear” the content is advertising.

Moreover, **Google** [allows advertising content to be labelled](#) on its platforms.

Impact and monetisation

The specific **aim** of a campaign with influencers isn't always the same:



Visibility

Get photo impressions and video views.



Engagement

Get interactions: likes, comments, shares...



External traffic

Redirect social media users to external platforms.



Conversion

Translate visits to content into a direct increase in sales or subscriptions.

Is marketing with influencers effective **in boosting sales**?

49%

of users trust influencers' recommendations **in their decisions to buy**.

Source: [Deloitte](#)

80%

would trust a recommendation made **by an anonymous person** more than one made by an influencer.

Source: [BazaarVoice](#)

...there's currently a **great debate** in the sector regarding this issue.



Representative agencies advise and support the commercial management of influencers.

They also often take on the work of creativity, planning and production.

Case study: Child YouTubers

The CAC has published a report on the advertising on YouTuber channels aimed at children and teenagers: [Informe sobre la presència de continguts publicitaris en canals de youtubers infantils i adolescents](#). The 15 channels analysed have more than 50 million subscribers, use children and teenagers as their stars, are in Spanish and managed in Spain. The report has analysed the 86 xxx published by these channels between the 10th and 31st of October 2019.

96% 71%

of videos **contain advertising**. Of these, two thirds advertise more than one product. 7 out of 10 videos are accompanied by direct links to websites where the products can be bought.

of the videos **do not warn viewers that they contain advertising**. Those that do inform viewers of their advertising content contain messages such as "sponsored by", which are considered to be "difficult to understand" for children.



The kind of product with the most advertising are **toys** (34.4%), followed by the YouTuber's own merchandise (23.8%), fashion and accessories (18%) and video games (11.6%).



Satisfaction discourse is the most widely used tactic (85.5%). In most cases this discourse is explicit, talking about the virtues of a product or expressing enthusiasm via effects such as applause or shouting.



Mostly reference is made to how the products can be used in everyday life or **the products are shown**. The report warns about the difficulty encountered by children in distinguishing between content and advertising messages.



The YouTubers' **own merchandising** is prominent among the products advertised, such as books and fashion items. This expresses "the capacity of YouTubers to boost loyalty" among their audience and therefore "influence behaviour in terms of consumption".



Newsflashes

Newsflashes (1)



Approval of the reform of the laws governing the CAC and CCMA

On the 23rd of October, the [Catalan parliament](#) unanimously approved the amendment of the laws governing the Catalan Audiovisual Council (CAC) and the Catalan Audiovisual Media Corporation (CCMA). This reform establishes that members of these two organisations must be chosen by at least two thirds of the house and proposed by a minimum of three parliamentary groups. The number of members of the CAC has been reduced from six to five, while those of the Governing Council of the CCMA have been increased from six to seven.



Recommendations for guardians of young children and teenagers

On the 29th of November, together with the Department of Employment, Social Affairs and Families and the College of Journalists of Catalonia, the CAC presented the [Guidelines on media coverage of children and adolescents under government guardianship](#). In addition to providing general recommendations, the document also includes specific guidelines regarding young migrants without adults accompanying them. Among others, one of the recommendations is to "use alternatives to the acronym MENA ("unaccompanied foreign minors") whenever possible, especially in news items with negative connotations".



Mediapro leaves Atresmedia and buys El Terrat

Imagina Media Audiovisual, the holding that owns Mediapro, announced to the Spanish stock market authority (CNMV) that it was selling its share (3.1%) in the Atresmedia group. On the other hand, in December Mediapro publicised its takeover of the production house El Terrat, which Andreu Buenafuente will continue to run.



New Ràdio Girona FM

After being absent for a year and a half, in November the municipal radio station, [Girona FM](#), started broadcasting again. In addition to FM, it also livestreams via its website and offers *a la carte* content and podcasts. The station is committed to the local community and participation with programmes focusing on the city's districts and organisations. It also includes "La ràdio a l'escola" (school radio), a weekly show produced by primary and secondary schoolchildren from Girona.



25 years of betevé

In November, betevé celebrated its 25th anniversary with a [website](#) containing archive images of key events in its history. Since it started broadcasting, the channel has undergone a considerable transformation: its workforce has grown from around twenty to over two hundred, it has incorporated a transmedia concept and also changed its image and name from BTV to betevé.

Newsflashes (2)



Report on the independence of media regulators

In October, the European Audiovisual Observatory published [*Iris Special: The independence of media regulatory authorities in Europe*](#). In addition to explaining the extensive legal and historical background of Europe's regulatory authorities, the report also compares independence in nine EU countries, including Spain. The study is based on criteria such as financial independence, the powers granted, their governance system and transparency, and highlights the legal changes required in each country as a result of the new European Audiovisual Media Services Directive.



Political ads on Facebook and Twitter

The Irish regulator, the [Broadcasting Authority of Ireland](#) (BAI), has presented its [Electcheck](#) study. This work, carried out on behalf of the [ERGA](#), aims to improve the implementation of the European Commission's plan to combat disinformation. The BAI demands the use of labels to make it easier to identify political adverts as such and also more transparency when these ads are registered. Twitter has also announced that it will ban this kind of advertising in its network, although Facebook has stated that it prefers to continue showing ads without any verification.



PwC report on the trends in entertainment and media in Spain 2019-2023

In its report entitled [Entertainment and Media Outlook 2019-2023 España](#), PricewaterhouseCoopers (PwC) stresses the need to diversify business models given increasing personalisation, also noting the key role played by data analysis as a tool for the sector.



CSA: analysis of recommendation algorithms on YouTube

In November, the French CSA published a study entitled [Capacité à informer des algorithmes de recommandation](#), about the automatic recommendation system for videos used on YouTube (the “Up Next” section) in terms of diversity and news pluralism. The study was carried out in June 2018 using 42 profiles: 38 corresponding to workers at CSA and 4 fictitious profiles based on 23 subjects that tend to be controversial.



New regulation in the United Kingdom to protect mental health on reality shows

Given the growing controversy of reality shows in the UK, Ofcom has added two new rules to its [Broadcasting Code](#) to safeguard the mental health of people who take part in radio and TV programmes. Due care must be taken over the welfare, wellbeing and dignity of participants, especially children and young people and participants must not be caused “unjustified” distress or anxiety by taking part.

BIAC. No. 15 – Third four months of 2019

Main sources:

- CAC: : the Council's own data
- EGM: : data from the 3rd sweep of 2019. Period October-November 2019. Area of Catalonia.
- Barlovento Comunicación: [monthly television audience reports](#).
- IAB Spain. [Estudio de TV Conectada 2019](#). Area of Spain. 1.000 interviews with internet users aged 16 and over. [Libro Blanco de Marketing de Influencers](#) (2019)
- Iconography: [Noun Project](#), [Freepik](#).

Bibliographic citation:

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