



Butlletí d'informació sobre l'audiovisual a Catalunya

(Newsletter on the Media Sector in Catalonia)

18

First four months of 2021
Nº 18. May 2021

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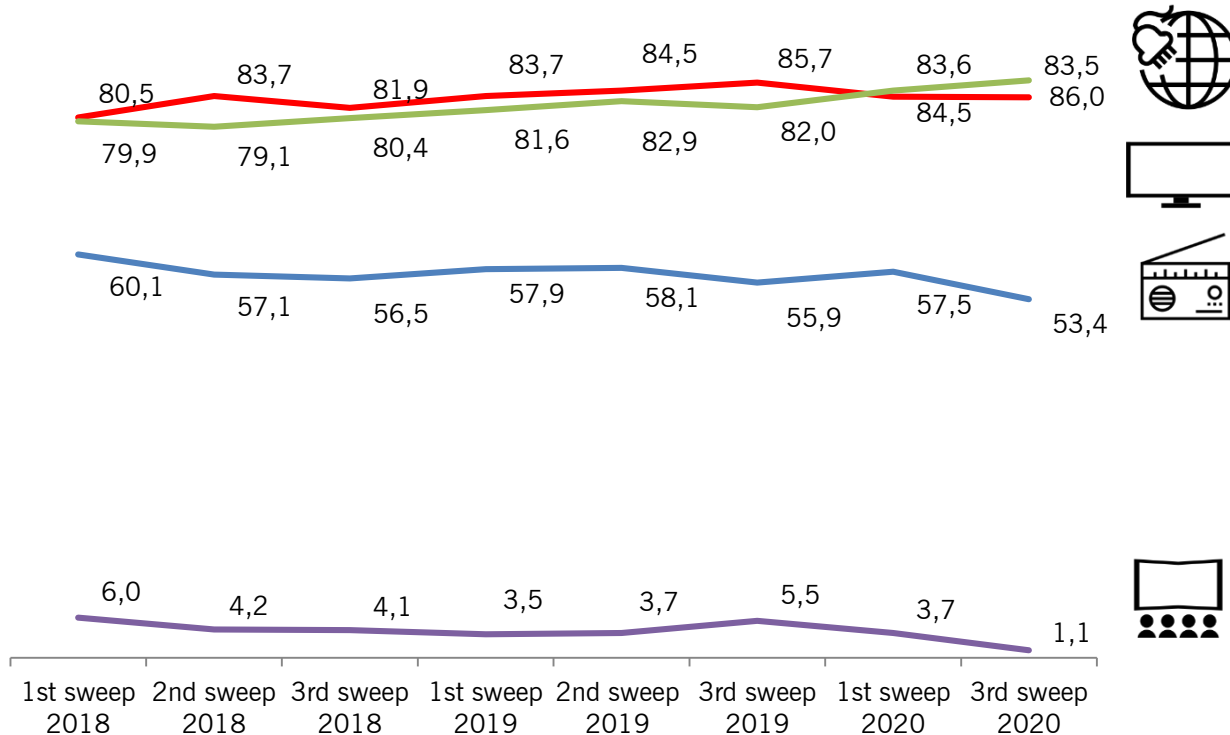


Flashes

36

Audiovisual penetration in Catalonia (1)

Media penetration in Catalonia (% of total population)



CONSUMPTION IN CATALUNYA

In the first four months of the year, the average television consumption was 3 hours and 27 minutes.

From Monday to Sunday, an average of 1 hour and 33 minutes of radio is heard daily.

Note: Due to the Covid-19 pandemic, in 2020 the EGM did not carry out the second sweep.

Penetration: 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 – 1st sweep 2021.

Audiovisual penetration in Catalonia (and 2)

Audiovisual penetration in Catalonia. By sex and age group (in %)



SEX / AGE	INTERNET	TELEVISION	RADIO	CINEMA
Total population	90.0	87.3	55.0	0.6
Men	92.1	86.6	57.6	0.7
Women	88.0	88.0	52.6	0.4
From 14 to 19 years	98.0	78.2	39.8	0.2
From 20 to 24 years	99.4	76.5	53.1	1.0
From 25 to 34 years	98.5	81.3	50.9	1.1
From 35 to 44 years	97.1	82.5	59.6	0.7
From 45 to 54 years	96.8	89.2	62.0	0.5
From 55 to 64 years	92.1	91.9	58.1	0.3
From 65 to 74 years	81.9	95.8	56.1	0.4
From 75 years and over	52.7	95.8	47.3	0.4

Source: EGM – Catalonia data – 1st sweep 2021.



Breakdown of DTT in Catalonia

 TV channel
  Commercial TV
  Public TV



Catalan households receive between 35 channels openly broadcast: 8 Catalan TV channels, 26 Spanish TV channels and the local TV channels.

**84 TV channels
openly broadcast**

7 out of 10 are commercial TV channels
and half are **local**.

8 Catalan channels



4 public

4 commercial



26 Spanish channels



5 public

21 commercial

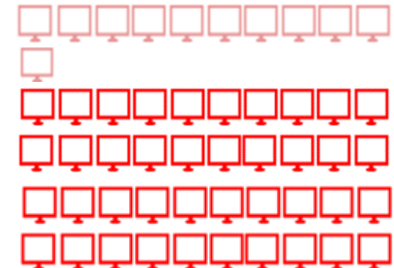


50 local channels



11 public

39 commercial



Note: BIAC uses the term *channel* (usual term) to refer to the *DTT programmes* (technical and administrative term) broadcast by each multiplex (MUX). This is the first issue of the BIAC in which the television channels that broadcast in high definition simulcast are counted only once (TV3, Barça TV, La 1, Clan, Teledeporte, Antena 3, laSexta, Telecinco and Cuatro).

Source: Catalan Audiovisual Council (Catalan and local DTT channels) and Ministry of Economy and Business (Spanish TV channels). May 2021.

Catalan DTT channels

Public TV Commercial TV Language used

By ownership, supply and vehicular language

Catalan

8 channels	4 public channels 50%	Corporació Catalana de Mitjans Audiovisuals (CCMA)    		
	4 commercial channels 50%	Grupo Godó  	Futbol Club Barcelona 	Alta Tecnologia en Telecomunicacions 

Source: Catalan Audiovisual Council. May 2021.

Spanish DTT channels

Public TV Commercial TV Language used

By ownership, supply and vehicular language

Spanish

26 channels	5 public channels 19%	Corporación de Radio y Televisión Española (CRTVE) 1 2 24h clan tdp				
	21 commercial channels 81%	Atresmedia Televisión 	Mediaset España 	NET Televisió 	13 Televisión 	Grupo Secuoya 
				VEO Televisión 	Real Madrid Televisión 	Grupo Kiss Media 

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

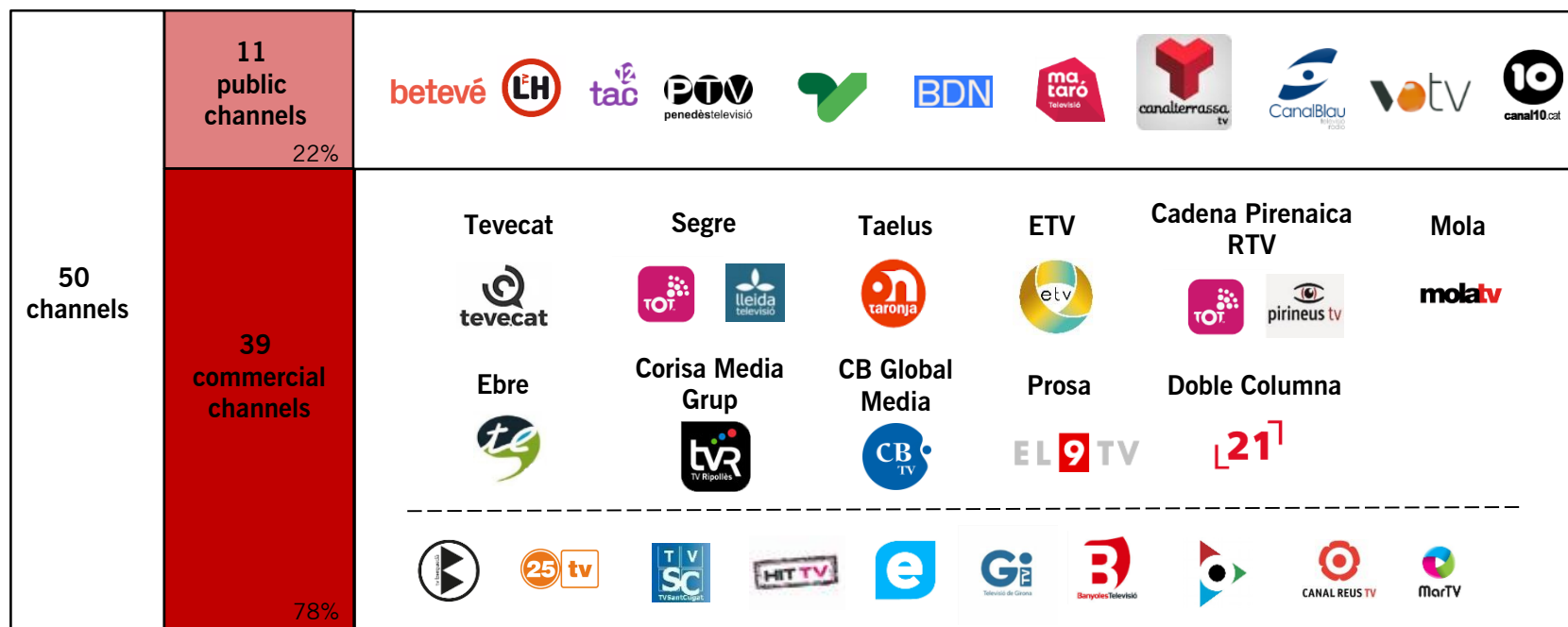
Font: Catalan Audiovisual Council and corporate websites of audiovisual communication service providers. May 2021.

Local DTT channels (1)

Public TV Commercial TV Language used

By ownership, supply and vehicular language

Catalan

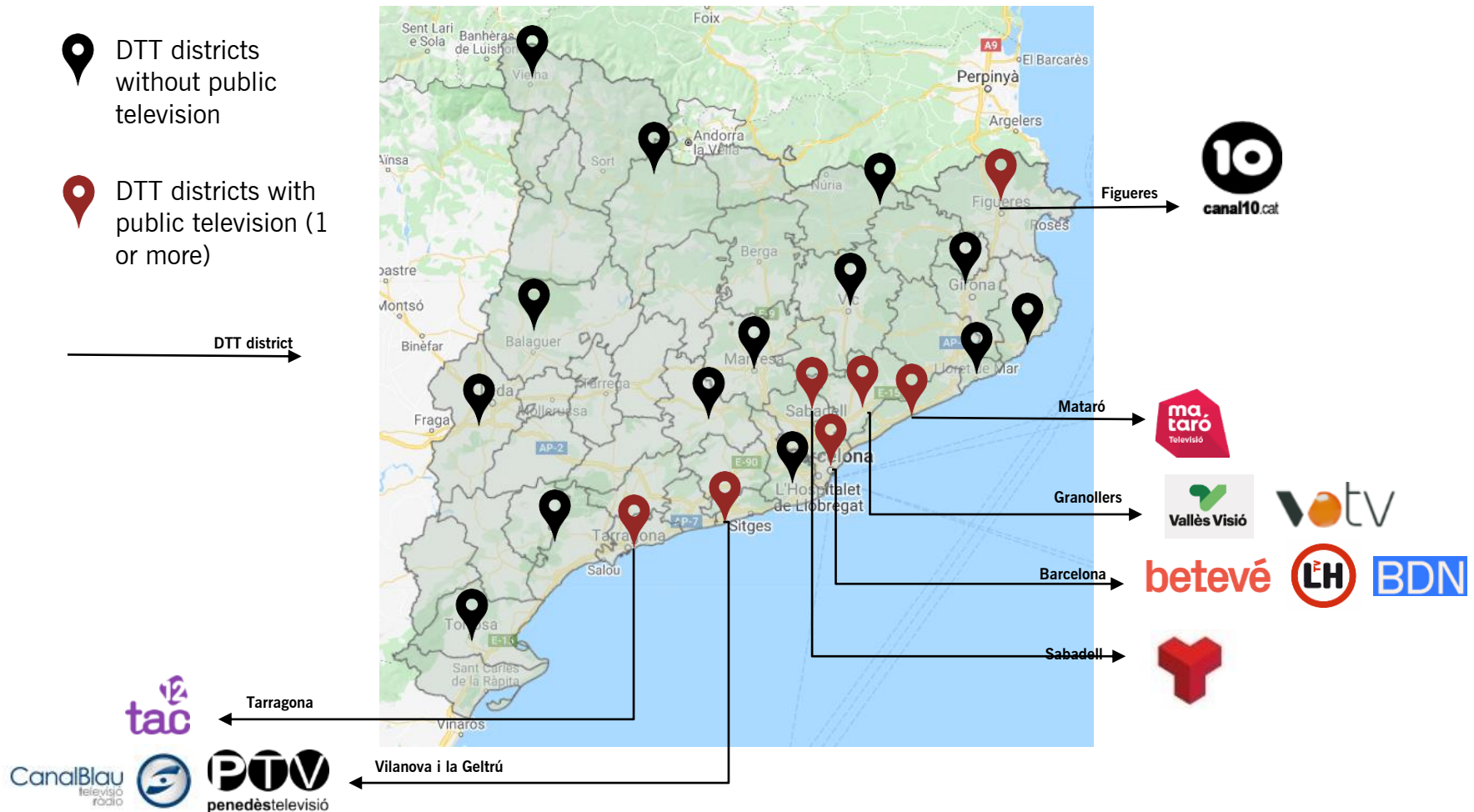


Note: Commercial channels are gathered by communication groups, if applicable. The box does include commercial channels of La Seu d'Urgell, Manresa and Vilanova i la Geltrú (S/D)

Source: Catalan Audiovisual Council. May 2021.

Public local DTT channels (2)

11 public television DTT channels distributed in 7 DTT districts

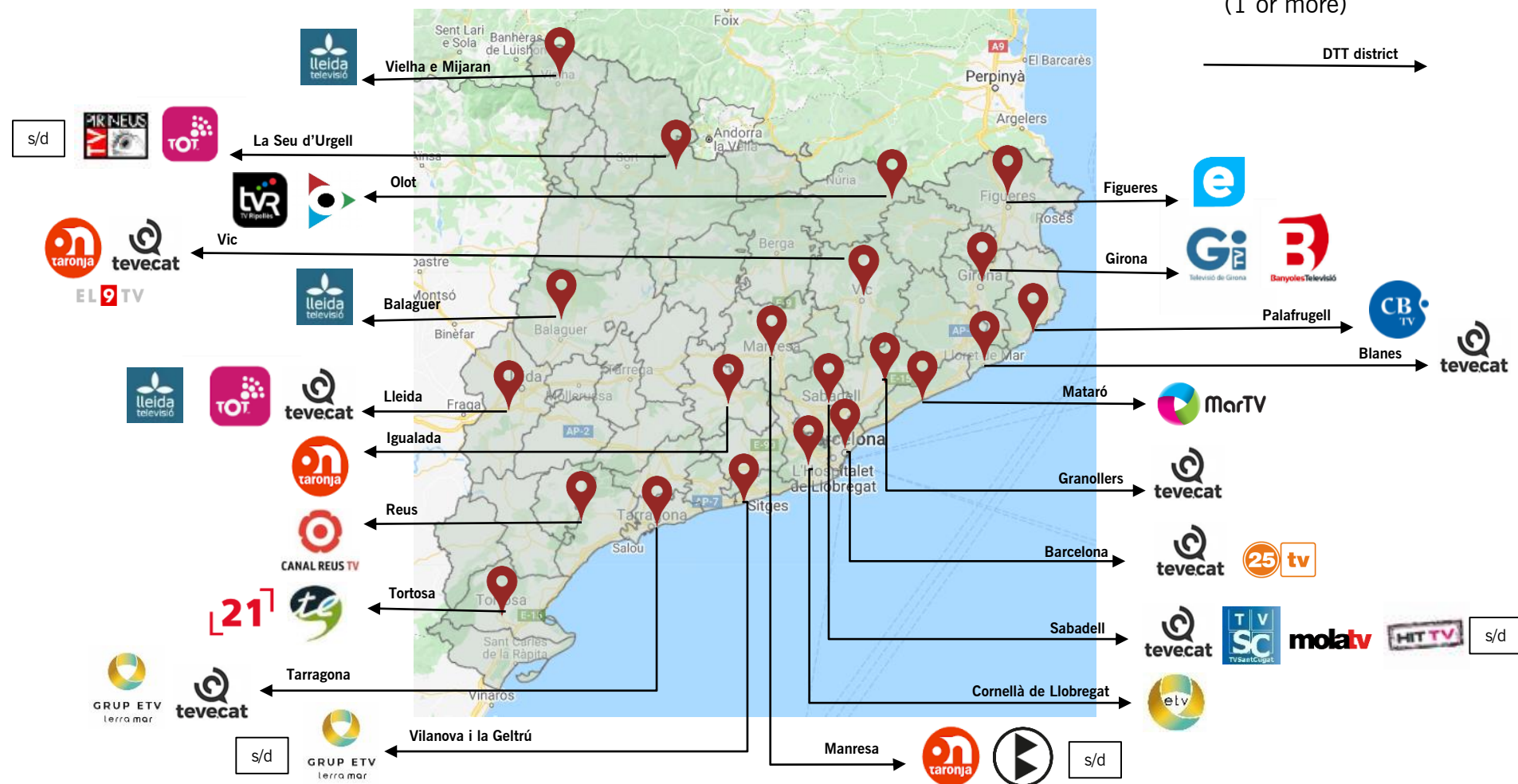


Source: [Map of audiovisual media of Catalonia](#) of the Catalan Audiovisual Council. May 2021.

Commercial local DTT channels (and 3)

39 commercial local television stations distributed in 21 districts

DTT districts with commercial television (1 or more)

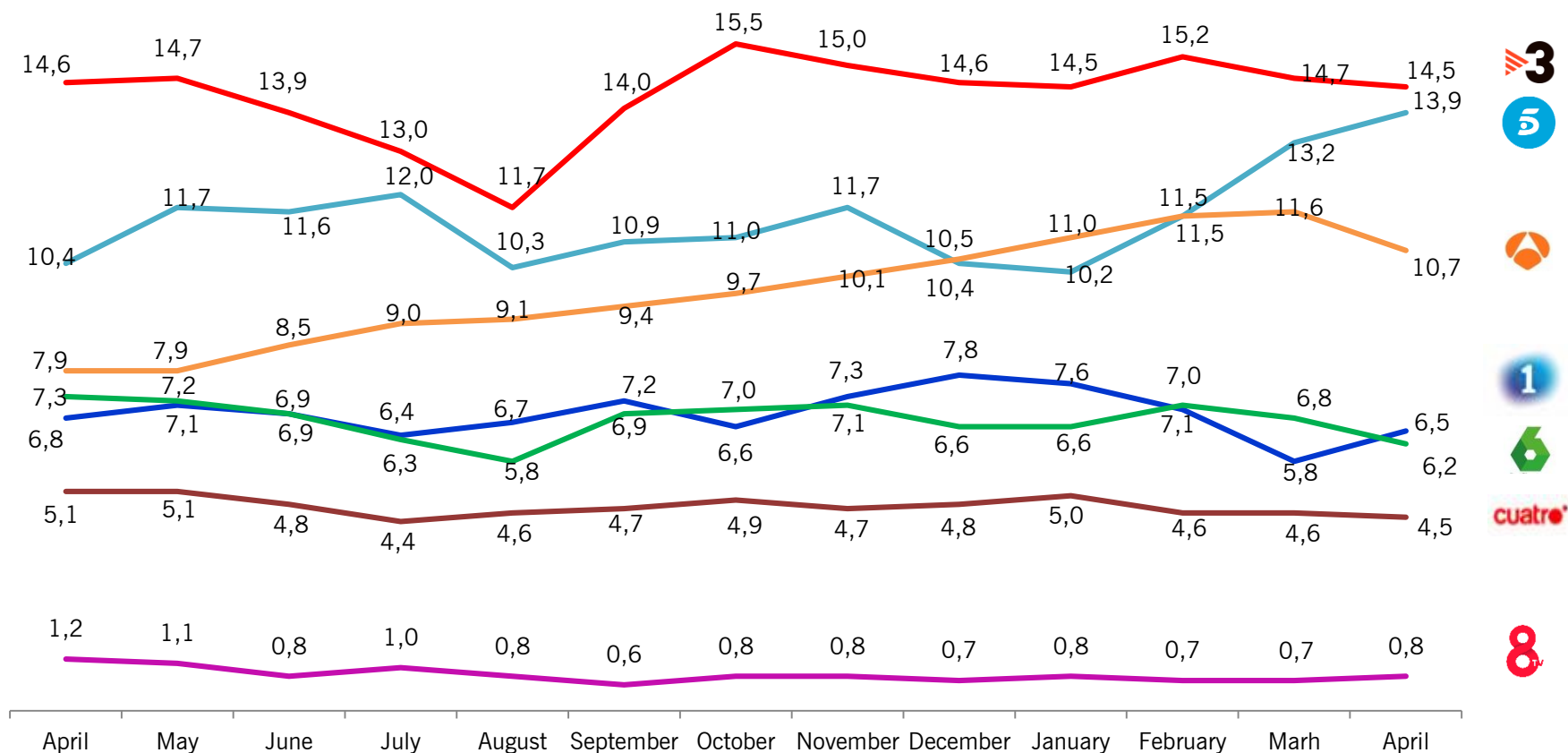


Source: [Map of audiovisual media of Catalonia](#) of the Catalan Audiovisual Council. May 2021.

DTT audiences (1)

Monthly trend in the share of the main DTT channels in Catalonia

(in %, from April 2020 to April 2021)



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](#).

DTT audiences (2)

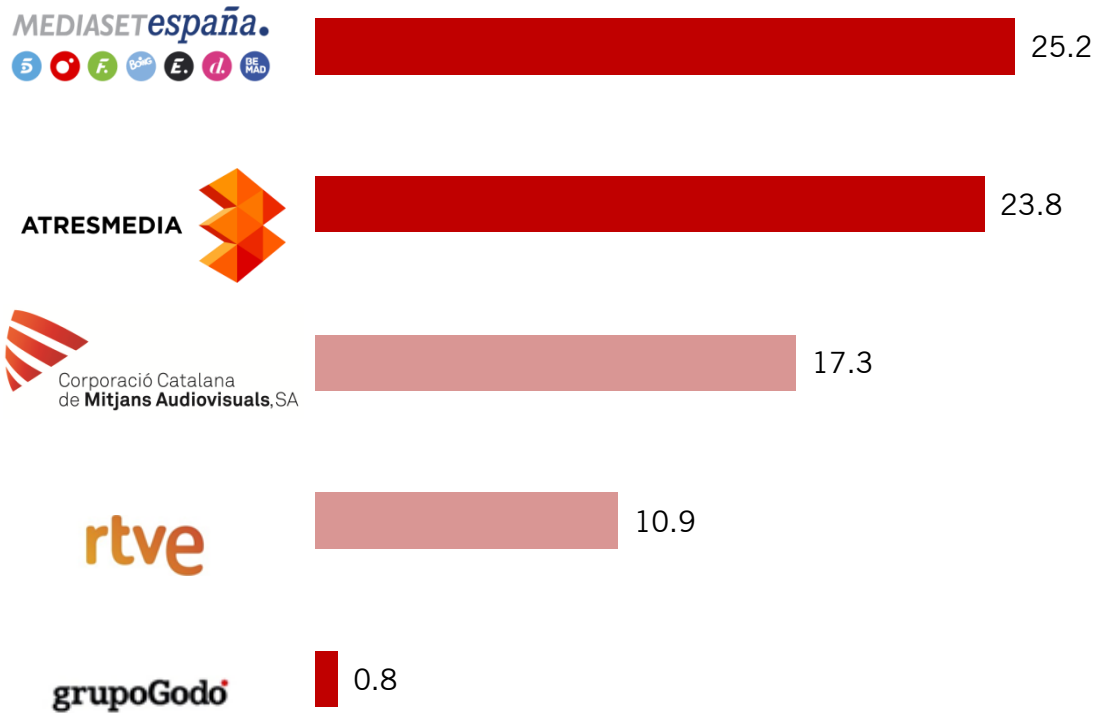
Monthly share per channel in Catalonia. (in %, from January to April 2021, in descending order according to average ranking)

Channel	January	February	March	April
TV3	14.5	15.2	14.7	14.5
Telecinco	10.2	11.5	13.2	13.9
Antena 3 TV	11.0	11.5	11.6	10.7
La1	7.6	7.0	5.8	6.5
laSexta	6.6	7.1	6.8	6.2
Cuatro	5.0	4.6	4.6	4.5
Energy	2.8	2.4	2.6	2.4
La2	2.3	2.3	2.3	2.2
Factoría de Ficción	2.2	2.2	2.1	2.0
Paramount Network	1.9	2.0	1.9	2.0
Divinity	2.0	2.0	1.7	1.9
DMax	1.6	1.6	1.7	1.9
Neox	2.2	2.2	2.0	1.8
Atreseries	1.8	1.7	1.5	1.7
TRECE	2.0	1.9	1.6	1.6
3/24	1.6	1.5	1.3	1.4
Nova	1.5	1.1	1.3	1.2
Mega	1.2	1.2	1.3	1.2
Boing	1.1	1.3	1.3	1.1
Dkiss	1.0	0.9	0.8	1.0
Clan	1.1	0.8	0.8	0.8
8tv	0.8	0.7	0.7	0.8
TEN	0.7	0.7	0.6	0.7
24h	0.7	0.7	0.6	0.6
Gol	0.5	0.5	0.6	0.6
BeMad	0.6	0.5	0.5	0.5
Super3/33	0.6	0.6	0.6	0.5
Esport3	0.5	0.4	0.6	0.5
Disney Channel	0.5	0.5	0.5	0.4
Teledeporte	0.4	0.3	0.4	0.4

Source: [Barlovento Comunicación](#).

DTT audiences (and 3)

Audience share in Catalonia (in % and by group, from January to April 2021)



Source: Own elaboration with [Barlovento Comunicación](#) data.



Audiovisual online

Subscriptions to IPTV platforms

Households and subscribers to the main pay-IPTV platforms. Catalonia. February-March 2021

IPTV	HOUSEHOLDS 		SUBSCRIBERS 	
	737,262	24.3%	1,729,462	26.2%
	169,904	5.6%	448,868	6.8%
	142,598	4.7%	330,050	5.0%

The numbers for IPTV pay-TV platforms showed no significant changes in the first four months of the year.

Movistar+ grew by 2.5% and now occupies a quarter of the conventional pay-TV market. Compared to the situation before the pandemic, growth has also been moderate.

The answers can be multiple, since the same household or individual may have one or more subscriptions to pay TV platforms, whether IPTV or OTT.

Source: EGM – Catalonia data. 1st sweep 2021. Base: 3,034,000 households and 6,601,000 people.

Subscriptions to OTT services

Households and subscribers to the main pay-OTT platforms. Catalonia. February-March 2021

PLATAFORMA VoD - OTT	LLARS 	PERSONES ABONADES 
NETFLIX	1,614,088 53.2%	3,742,767 56.7%
prime video	1,067,968 35.2%	2,429,168 36.8%
HBO	433,862 14.3%	970,347 14.7%
Disney+	354,978 11.7%	778,918 11.8%
DAZN	115,292 3.8%	310,247 4.7%
FILMIN	109,224 3.6%	191,429 2.9%
Rakuten TV	75,850 2.5%	184,828 2.8%
Other suppliers	227,550 7.5%	534,681 8.1%

During a pandemic year, paid OTT platforms **have almost doubled subscriptions** to over 9.1 million subscribers, compared to 5.2 million in the same period in 2020.

Netflix remains the first choice and exceeds 50% penetration in the Catalan market.

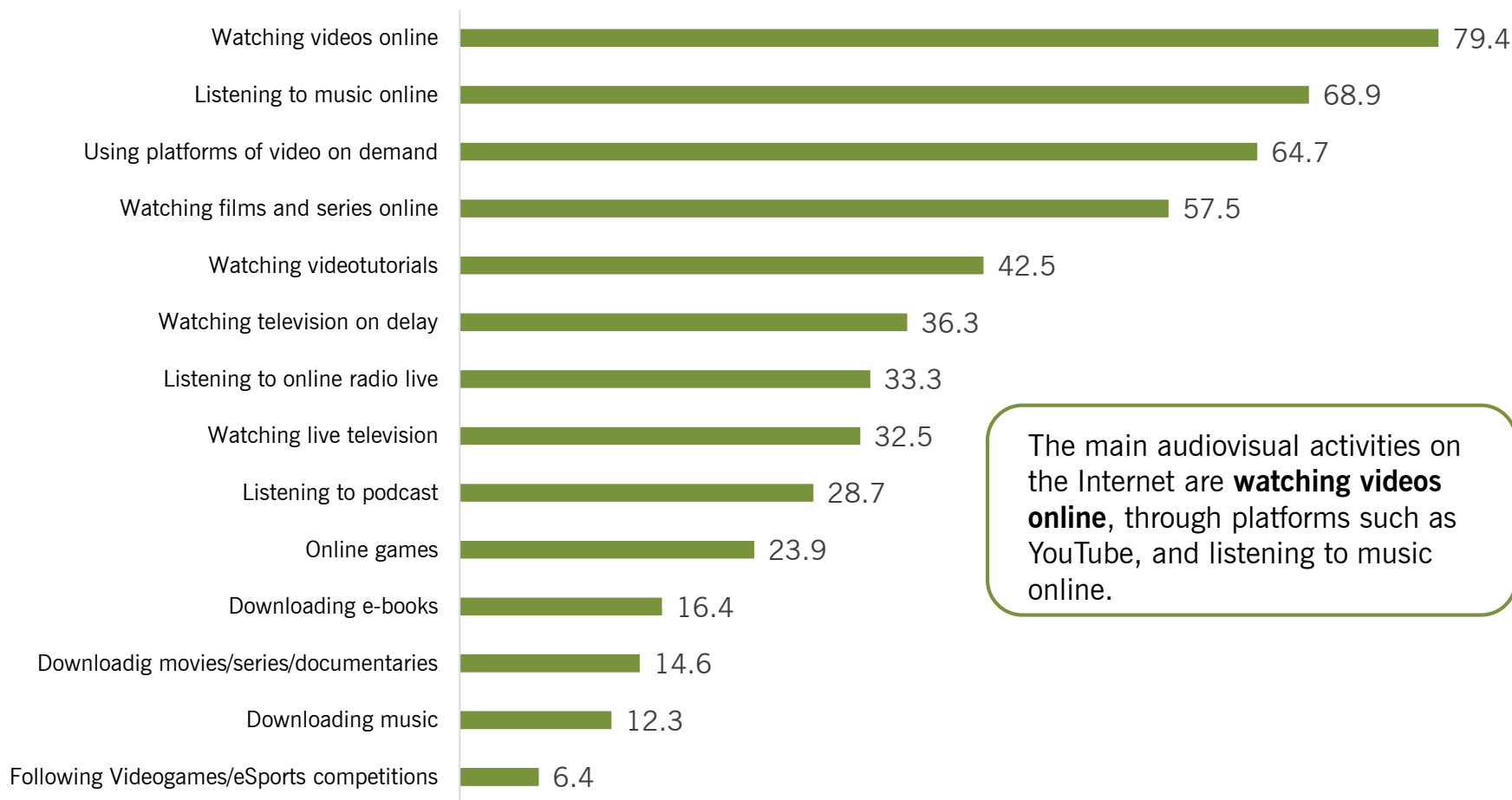
Amazon Prime Video consolidates its position as the second OTT platform with 2.4 million subscribers and a 36.8% share, followed by **HBO**, with almost one million subscribers.

Filmin's growth stands out, doubling the number of subscribers from 70,000 to 191,000 in one year.

Source: EGM – Catalonia data. 1st sweep 2021. Base: 3,034,000 households and 6,601,000 people.

Consumption of online audiovisual content (1)

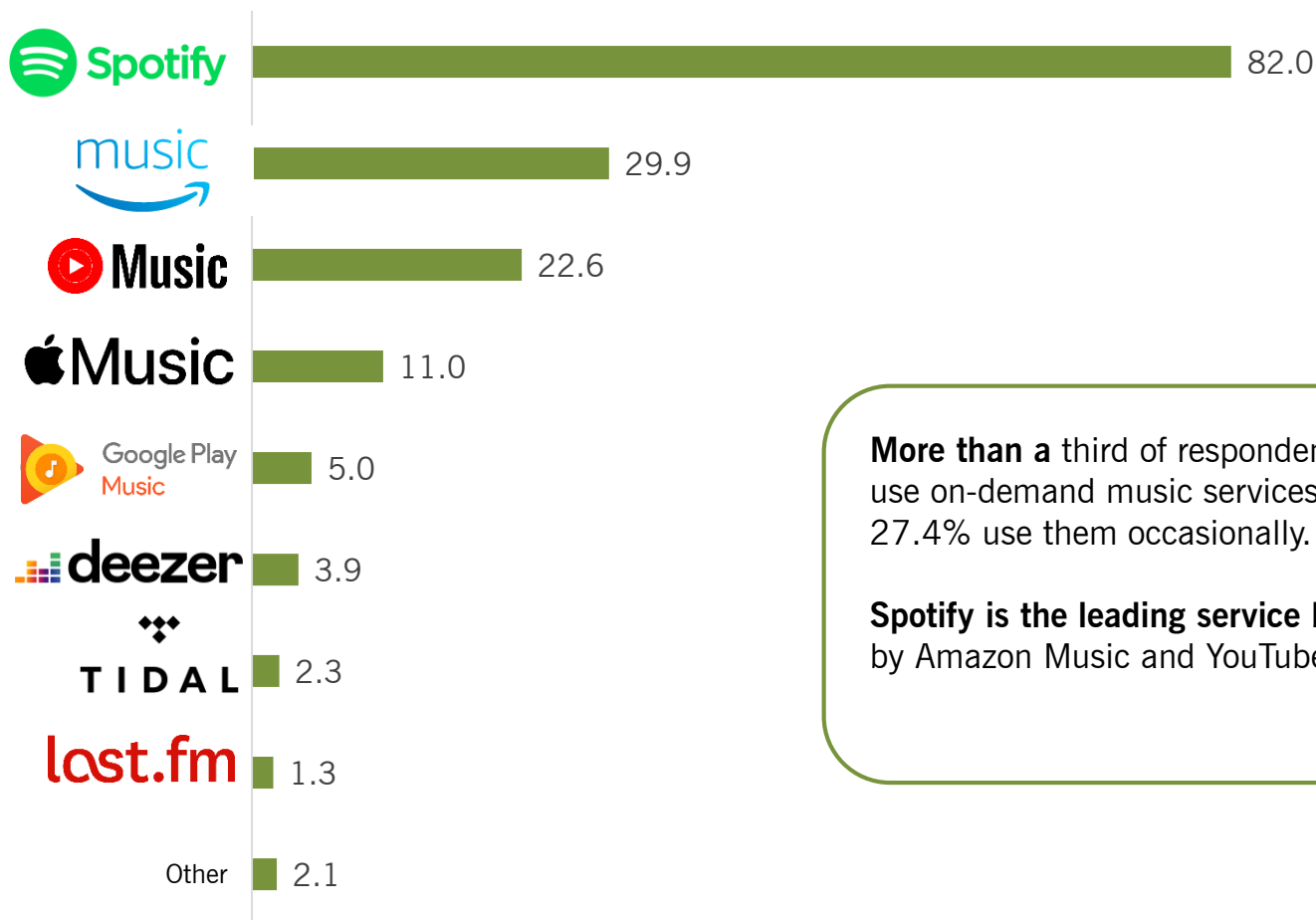
Activities related to online audiovisual content. Catalonia. Year 2020 (last 30 days, in %)



Source: AIMC (2021). [23ª encuesta a usuarios de internet - Navegantes en la red](#). Scope: Catalonia. October-December 2020.

Consumption of online audiovisual content (and 2)

Music on demand services. Catalonia. 2020 (in %)



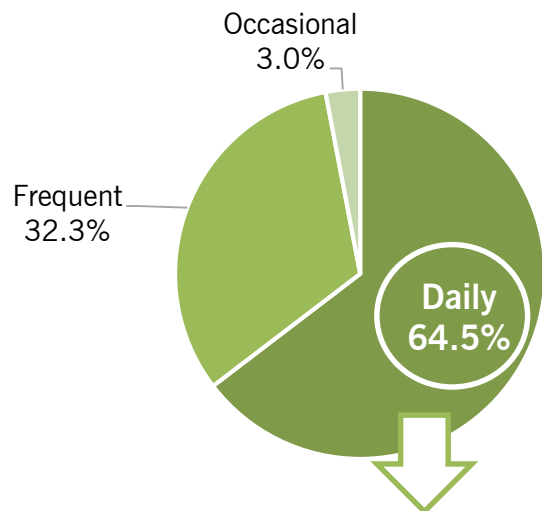
More than a third of respondents frequently use on-demand music services (35.6%) and 27.4% use them occasionally.

Spotify is the leading service by far, followed by Amazon Music and YouTube Music.

Source: AIMC (2021). [23ª encuesta a usuarios de internet - Navegantes en la red](#). Scope: Catalonia. October-December 2020.

Consumption of digital audio

Digital listener's habits. Spain. Year 2021 (in %)



**81% of 16-24 year-olds
listen to digital audio on a
daily basis**

What do they mainly listen to?

Music: 8 out of 10 listeners

News o current events: 6 out of 10 listeners



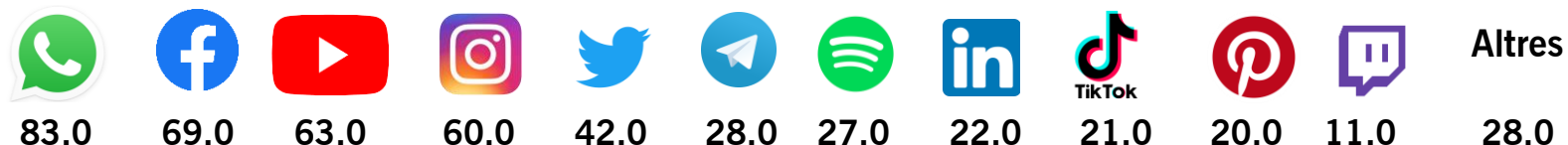
How do they listen to it?

- 77.8% Music on demand (Spotify, Apple Music, etc.)
- 70.8% Live or streaming radio
- 46.1% Delayed radio (networks, app, etc.)
- 43.8% Podcast
- 31.0% Voice assistants
- 21.7% Audiobooks
- 16.1% Aggregators (iVooz, TuneIn, etc.).

Source: IAB Spain. [Estudio de audio digital 2021](#). Total interviews N=1.136 people over 16 years old. Spain, February 2021.

Consumption of social media

Main social media used. Spain. Year 2021 (in %) (question: in the last month)



85% of the population uses social media.

Average

Age: **40 years old.**

Connection time: **1h 21 minutes.**

Number: **4.7 social media** per person per month.



WhatsApp and Instagram have the highest frequency of use.



The use of **Facebook and YouTube** decreases.

Main uses

81% Entertaining

72% Interact

66% Informing



Source: IAB Spain. [Estudio de redes sociales 2021](#). Total interviews N=1.101 users and 278 professionals over 16 years old. Spain, March-April 2021.



Breakdown of radio stations in Catalonia

Public radio
Commercial radio

261 radio stations

75% of the FM frequencies in Catalonia broadcast on public radio.



Households in Catalonia receive more than 30 radio stations on average: 12 Catalan radio stations, 19 Spanish and also local radio stations.

By service area

13 Catalan stations

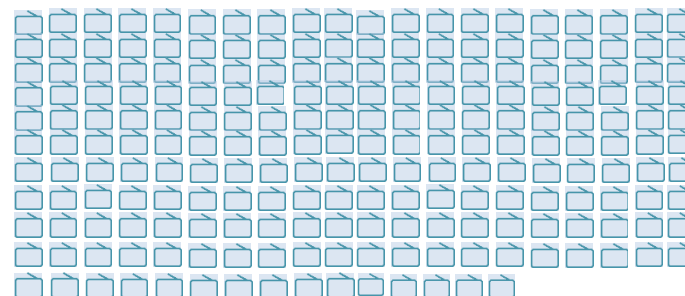
5 public
8 commercial

18 Spanish stations

4 public
14 commercial

230 local stations

215 public



15 commercial



Note: within the BIAC, a broadcaster / station means a radio media that broadcasts by one or more frequencies.

Source: CAC (local FM), CCMA (Catalan FM) and Ministry of Economy and Enterprise (Spanish public FM). May 2021.

Public radio

 Language used

By service area and language of broadcast

224	5 Catalan radios	      Catalan
	4 Spanish radios	     Spanish
	215 local radios*	             Catalan

* Examples of local radios.

Source: Catalan Audiovisual Council (local FM), Corporació Catalana de Mitjans Audiovisuals (Catalan FM) and Ministry of Economy and Enterprise (Spanish FM). May 2021.

Commercial radio

 Language used

By service area and language of broadcast

37 Commercial radios	8 Catalan radios	GODÓ   FLAIX  TELE TAXI    Catalan ESTEL  PRISA 
	14 Spanish radios	PRISA       COPE    ATRESMEDIA    RADIO BLANCA  UNIDAD EDITORIAL   Spanish (except for disconnexions)
	15 Local radios	     EL 9 FM           Catalan

Source: Catalan Audiovisual Council. May 2021.

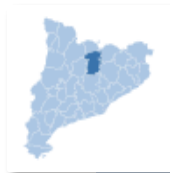
Public municipal radio stations by county

From Barcelonès to Garrigues



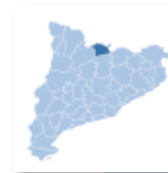
Barcelonès

- [Ràdio Ciutat de Badalona](#) (94.4)
- [Betevé](#) (91.0)
- [Grama Ràdio](#) (online)
- [Ràdio L'Hospitalet](#) (online)



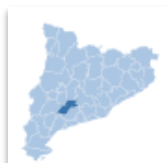
Berguedà

- [Ràdio Berga](#) (107.6)
- [Ràdio Puig-reig](#) (107.3)



Cerdanya

- [Ràdio Puigcerdà](#) (107.9)



Conca de Barberà

- [L'Espluga FM Ràdio](#) (107.4)
- [Ràdio Montblanc](#) (107.1)



Garraf

- [Ràdio Cubelles](#) (107.5)
- [Ràdio Ribes](#) (107.2 – Sant Pere de Ribes)
- [Ràdio Maricel](#) (107.8 – Sitges)
- [Canal Blau FM](#) (100.5 – Vilanova i La Geltrú)



Garrigues

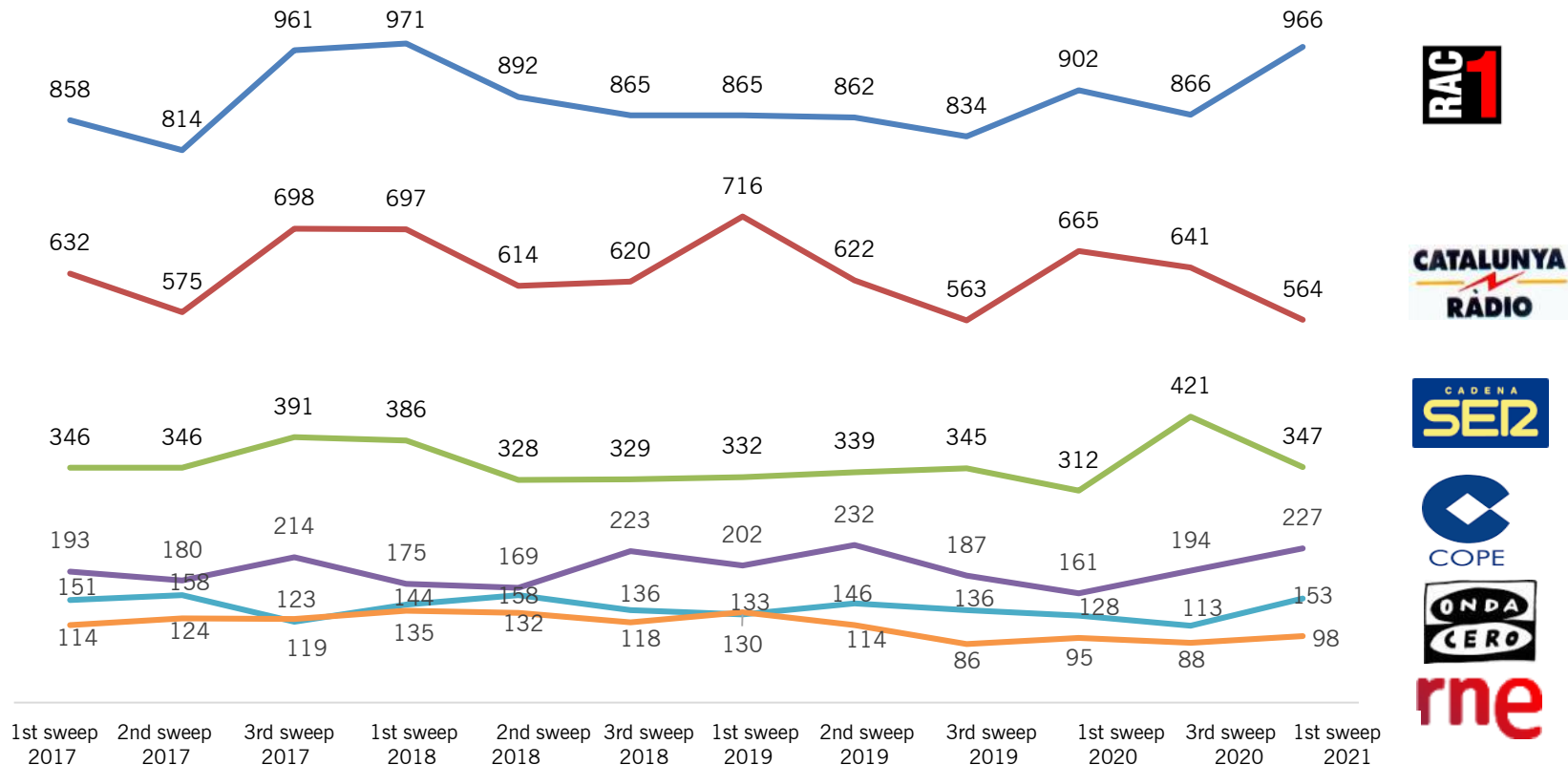
- [Ràdio Arbeca](#) (107.8)
- [Ràdio Juneda](#) (107.6)
- [Ràdio Les Borges](#) (107.1 – Les Borges Blanques)

Source: [Map of audiovisual media of Catalonia](#) of the Catalan Audiovisual Council, corporate webpages of local broadcasters and Idescat (map).
Consultation date: May 2021

Radio audiences (1)

General radio ranking. Audiences

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

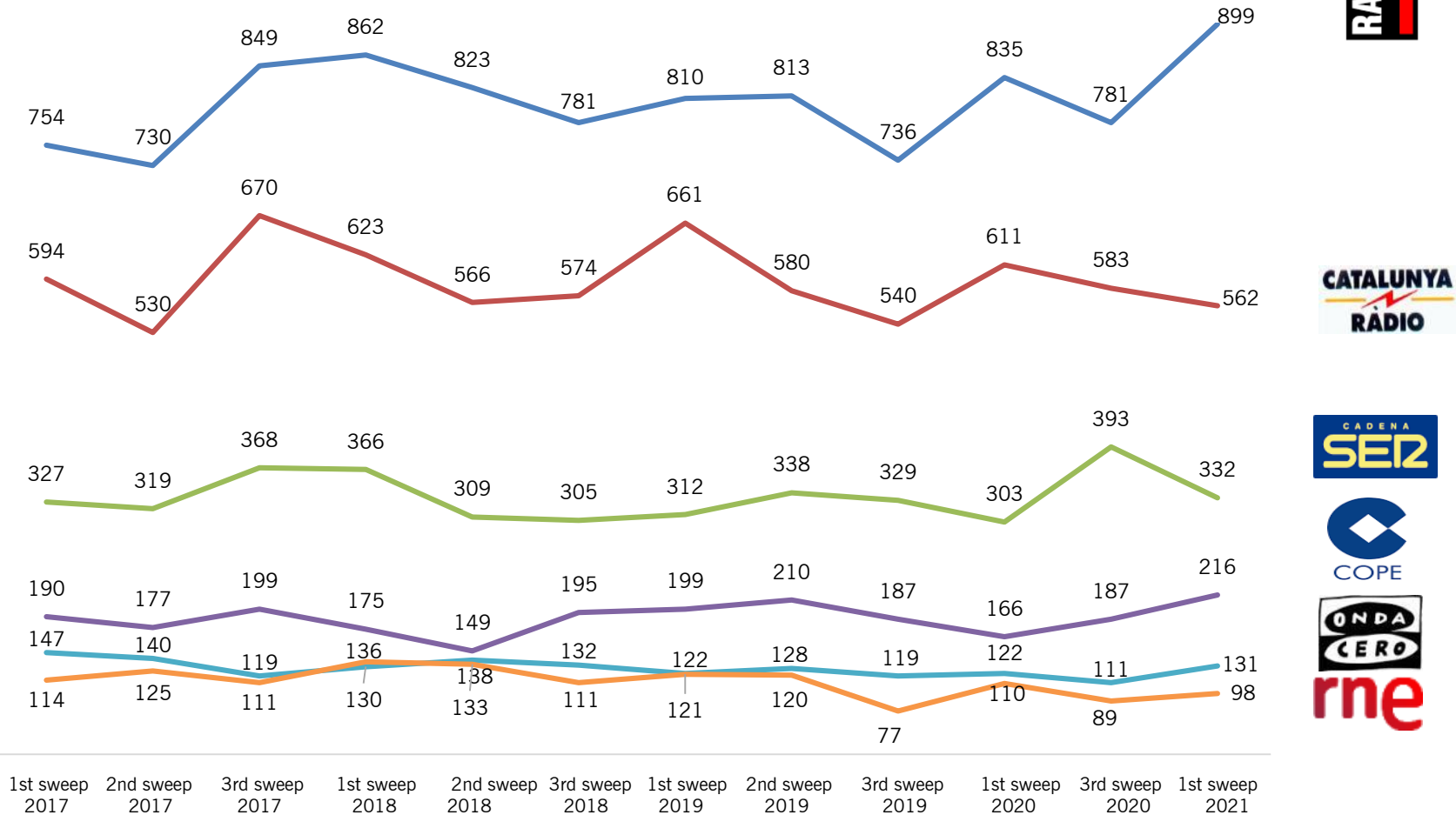


Source: EGM – Catalonia data – 1st sweep 2021. Note: Due to the Covid-19 pandemic, in 2020 the EGM did not carry out the second sweep.

Radio audiences (2)

General radio ranking. Audiences

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

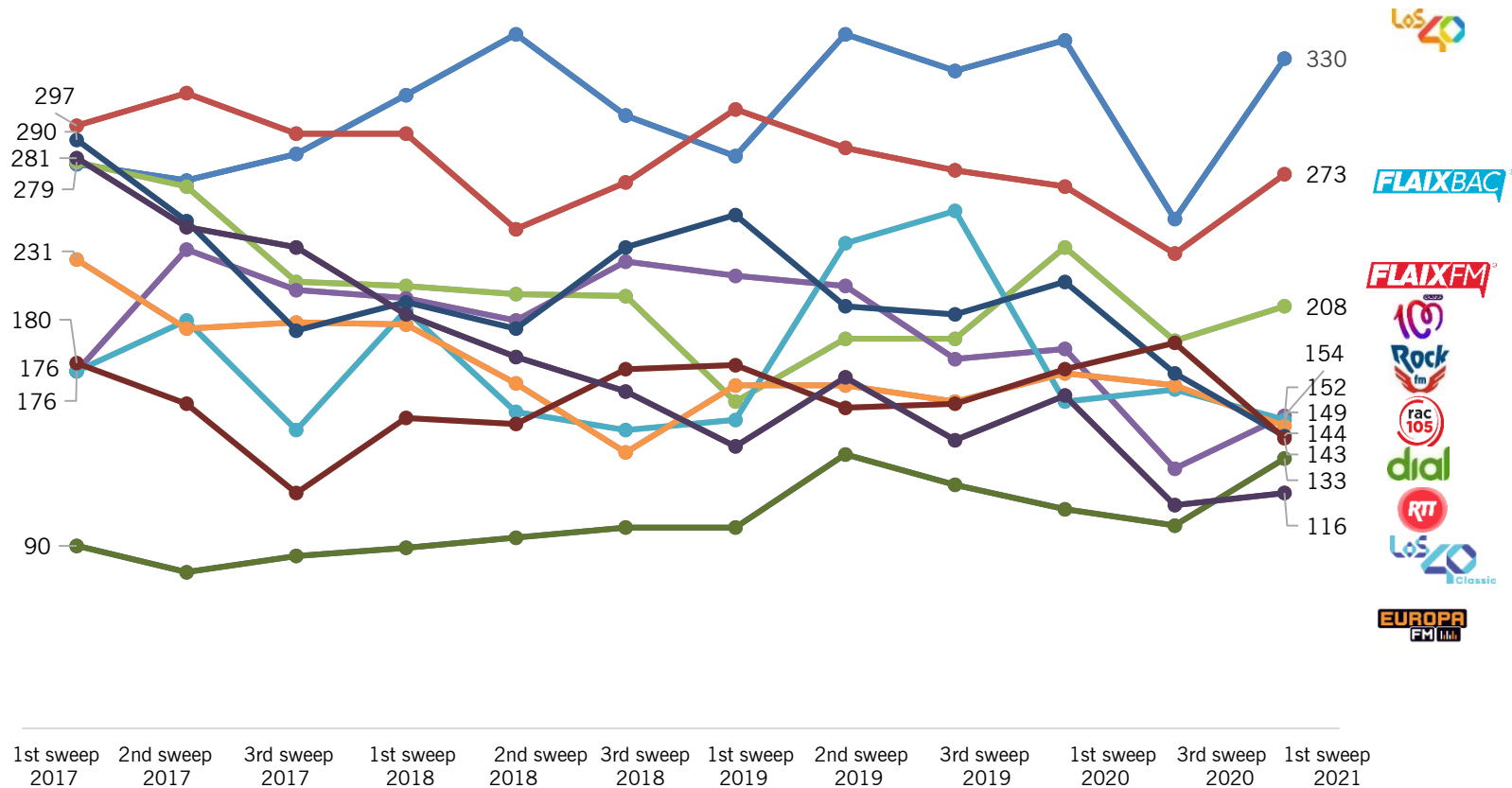


Source: EGM – Catalonia data – 1st sweep 2021. Note: Due to the Covid-19 pandemic, in 2020 the EGM did not carry out the second sweep.

Radio audiences (3)

Music radio ranking. Audiences

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

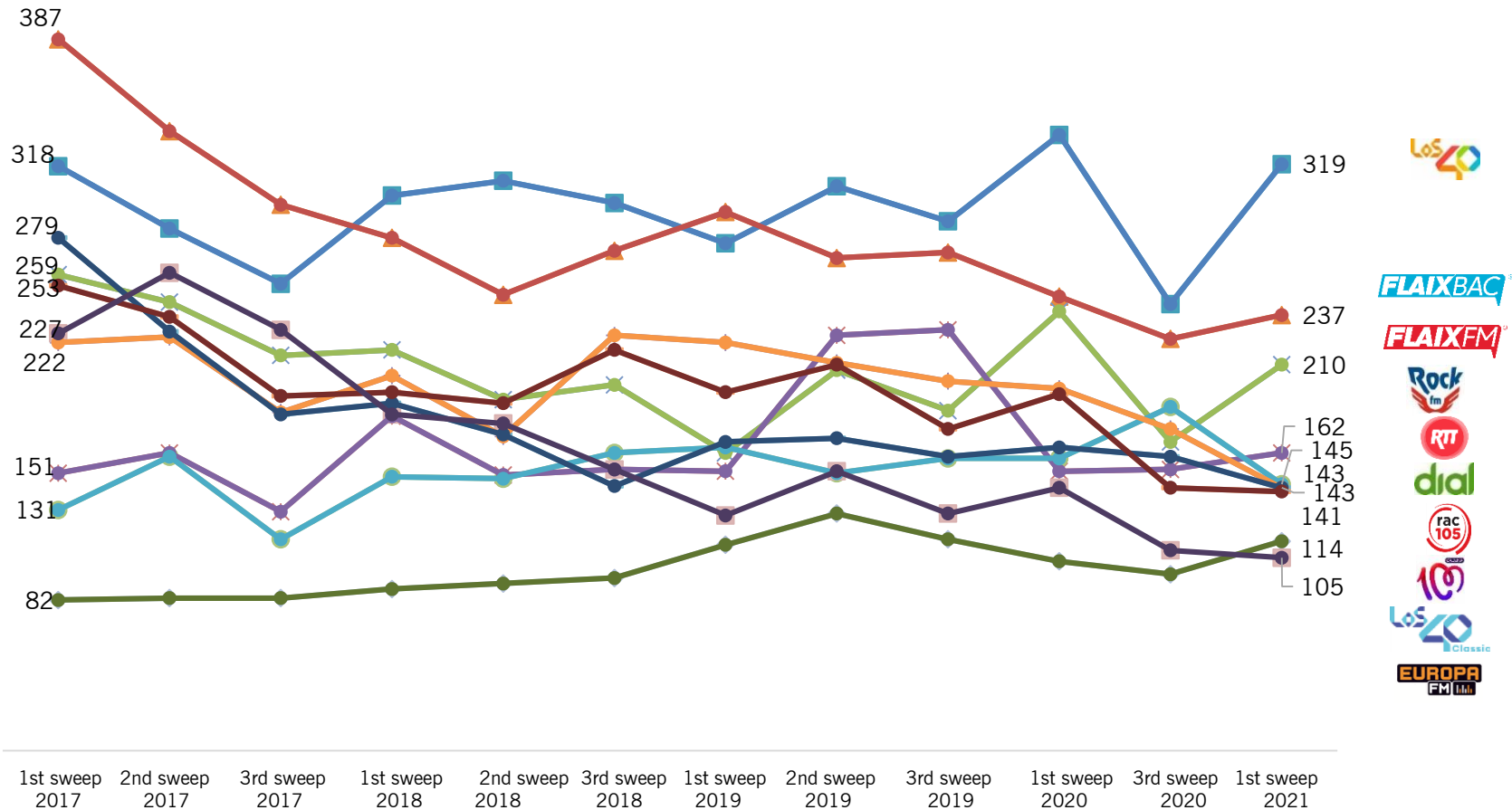


Source: EGM – Catalonia data – 1st sweep 2021. Note: Due to the Covid-19 pandemic, in 2020 the EGM did not carry out the second sweep.

Radio audiences (4)

Music radio ranking. Audiences

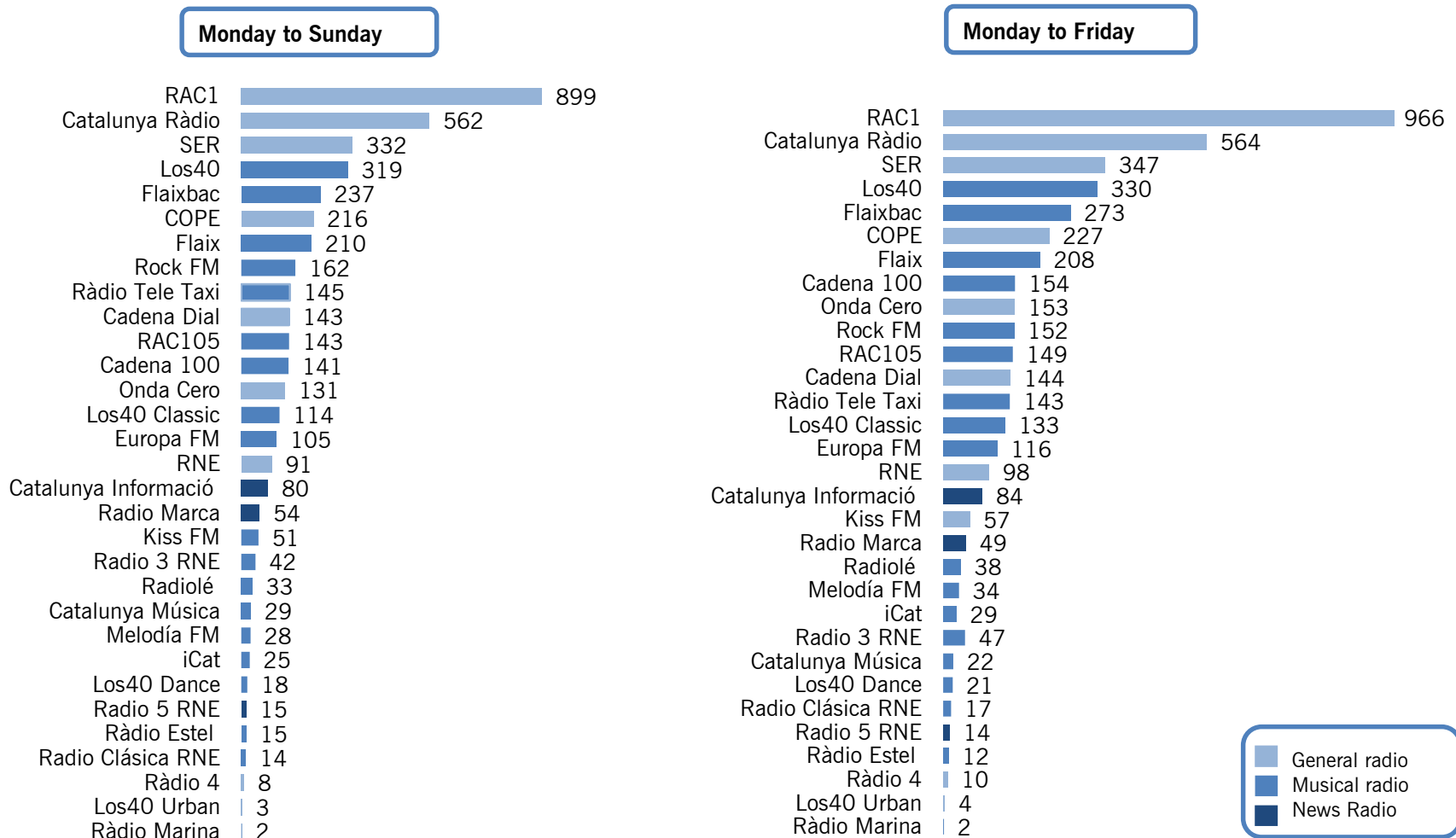
(trend in the last twelve sweeps, in thousands, day prior to interview, from Monday to Sunday)



Source: EGM – Catalonia data – 1st sweep 2021. Note: Due to the Covid-19 pandemic, in 2020 the EGM did not carry out the second sweep.

Radio audiences (5)

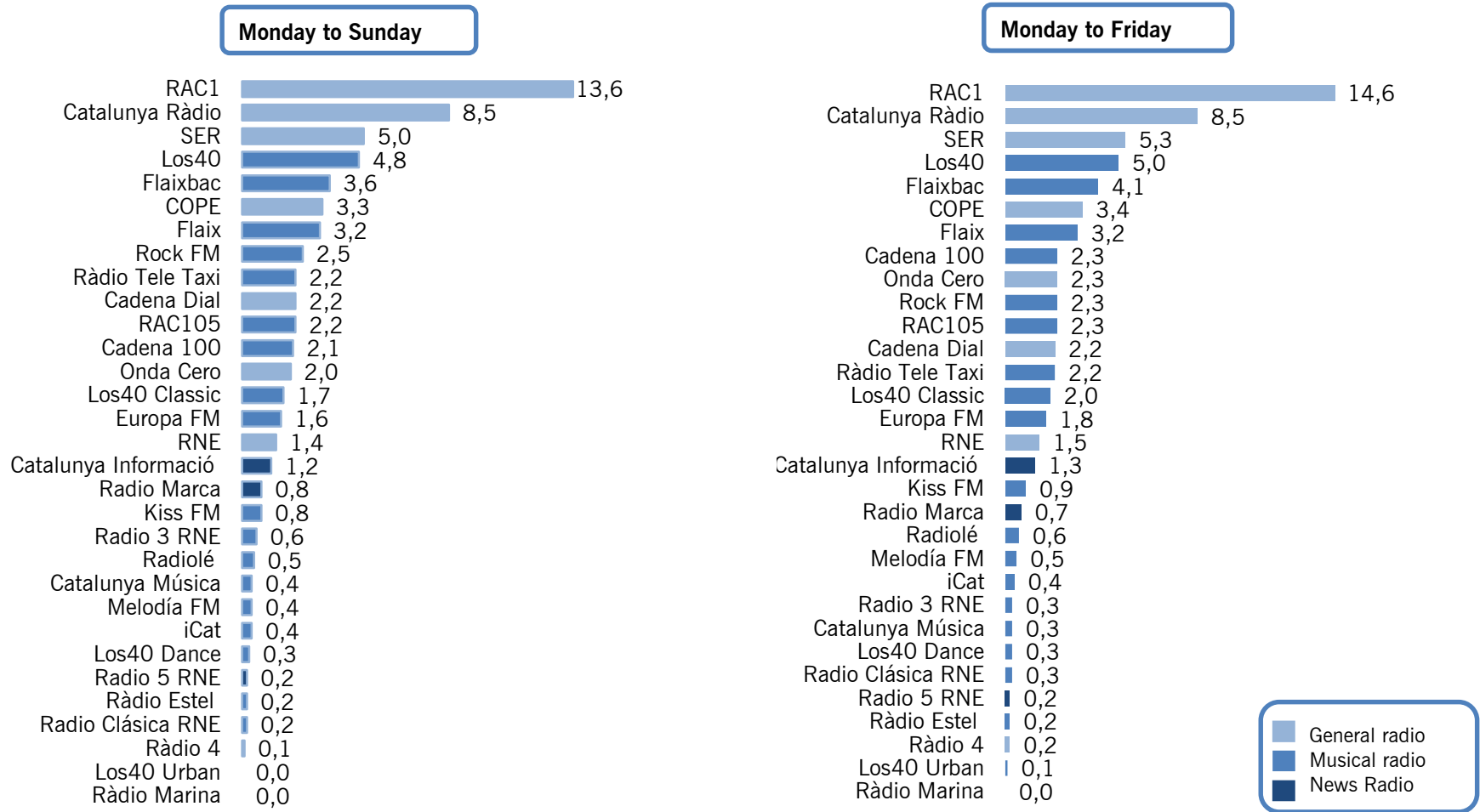
Cumulative daily radio audiences in Catalonia (in thousands, out of total population, day prior to interview)



Source: EGM – Catalonia data – 1st sweep 2021. Note: Due to the Covid-19 pandemic, in 2020 the EGM did not carry out the second sweep.

Radio audiences (and 6)

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



Source: EGM – Catalonia data – 1st sweep 2021. Note: Due to the Covid-19 pandemic, in 2020 the EGM did not carry out the second sweep.



Note:

Transposition of European audiovisual legislation

Transposition of European audiovisual legislation (1)



URGENT: Transposition of the European [Audiovisual Media Services Directive \(AVMSD\)](#) into the Spanish legal system, through the [Preliminary Draft General Law on Audiovisual Communication](#), and the modification and updating of the **Catalan Audiovisual Communication Law**.

CAC considerations in relation to the transposition of the Directive:

The Catalan Audiovisual Council (CAC) considers that the legislative initiatives of [Catalonia](#) and [Spain](#) must **incorporate measures to promote cultural and linguistic diversity, the protection of minors, the promotion of self-regulation and the strengthening of regulatory bodies**, among others.

Financial contribution to in-house production

Increase by **10% of the financial contribution to the internal production of the big platforms on demand** (such as Netflix, HBO, Amazon Prime, etc.). **A proportional part of this production shall be in Catalan.**



European works quotas

Within the 30% of a platform offer, the minimum percentage reserved for **European works**, a significant part shall be allocated to **European works produced, dubbed or subtitled in Catalan.**



Availability in online catalogs

Online platforms shall offer in their catalogs **the original versions, dubbed or subtitled in Catalan**, and ensure their **prominence**.

Transposition of European audiovisual legislation (and 2)

Prominence

The Audiovisual Communication Services Directive establishes **the prominence of content for European works in audiovisual services on demand** (recital 35 and Article 13).

It also allows Member States to take measures to ensure **the prominence for content of general interest** (recital 25 and Article 7a).

This measure refers to the **on-demand services catalogs**, but can be extended to other functionalities: **algorithmic recommendation systems or search engines**, among others.

The prominence of Catalan content in on-demand audiovisual services will be a **fundamental instrument for Catalonia's linguistic policy in the coming decades**.

The CAC has the challenge of making the effective regulatory deployment of prominence, and ensuring compliance.



Minors protection from harmful content



Strengthen measures to **protect children and adolescents from hate speech, pornography, violence and other harmful content** on video sharing platforms and other audiovisual services.

More over, **personal data** of minors collected or generated by these providers **may not be used for commercial purposes**.

Strengthen audiovisual regulatory bodies

Update the competencies of the audiovisual regulatory bodies, especially with regard to videos sharing platforms and on-demand audiovisual services to enforce the new objectives and measures.

Establish an axis of **collaboration and participation** between regulatory authorities.



Promoting self- and co-regulation

The CAC must promote, within the framework of European institutional cooperation, that **platforms adopt codes of conduct** on unhealthy food and drink, online advertising and betting, content signs and the fight against misinformation and fake news.



Newsflashes

Newsflashes (1)



À Punt TV channel joins the Bon Dia TV platform

In February 2021, À Punt (the public TV broadcaster of the Valencian Broadcasting Corporation, CVMC) announced its incorporation into the [Bon Dia TV](#) digital platform.

Bon Dia TV was born in November 2018 as a joint venture between the public Balearic Broadcasting Corporation (EPRIB) and the public Catalan Broadcasting Corporation (CCMA). Its aim is to share content, and broadcast it through the network. À Punt's audiovisual content will be part of the platform's catalog.



Agreement in the Spanish Parliament on TV broadcasting reciprocity

On 11 March 2021, the Spanish Parliament passed three points of the [Non-legislative Motion on the multi-lingual reality and linguistic equality in Spain](#). One of the points allows “the administrative use of the different languages between territories of the same linguistic space, inside and outside the administrative borders, without barriers, and to sign agreements for the reciprocal reception of mass media within these linguistic spaces”.



The Spanish Government presents a plan to promote the audiovisual industry

The plan called [Spain, audiovisual hub of Europe](#) was presented in March and has an endowment of 1,603 million euros for the period 2021-2025.

The initiative includes 15 measures in four axes:

a) digitalization, internationalization, and attraction of investments (240M€); b) improvement of financial and fiscal instruments (1,330M€); c) talent promotion and human capital development (15M€), and d) regulatory reforms and elimination of administrative barriers (18M€).

An annual audiovisual report will be drawn up to monitor the measures of the plan, which will include the evolution and growth prospects of this sector.



Delta.cat, a new local multimedia platform, is born

The Southern Catalonia city councils of Deltebre, Sant Jaume d'Enveja, Camarles and L'Ampolla have launched a joint cross-platform medium, called [Delta.cat](#). This platform has a radio, a streaming television and a website to consult news related to the geographical zone, as well as a social media to spread and viralize the contents. The main studios and the headquarters of the new medium will be in Deltebre.

Newsflashes (and 2)



Online violence against women journalists is growing

The UNESCO report [*The Chilling: Global trends in online violence against women journalists*](#) indicates the existence of an increase in online violence against women journalists. Furthermore, the report reveals that these attacks are linked to misinformation, intersectional discrimination and populist politics. The paper presents a summary of an interdisciplinary study conducted by the International Center for Journalists (ICFP) and is the first of its kind in terms of its scope and methodology.



Public service and gender equality

The European Broadcasting Union (EBU) published in March the third edition of the report [*Gender Equality and Public Service Media*](#), which focuses on gender equality at the corporate level (off-screen) and the representation of gender on screen (on-screen).

The main conclusion is that women are underrepresented in European radio and television channels in terms of their on-screen presence, but especially in terms of their speaking time. The trend is even worse in newscasts and sports programs.



France: *Kit pédagogique du citoyen numérique*

The French regulators with competences with the digital field (CSA, CNIL, Hadopi and the Defender of the rights) have elaborated the [*Pedagogical kit for the digital citizen*](#), that gathers all the resources designed for the digital education of the citizenship. It is aimed to the educational and training communities and families who accompany minors in digital matters. The kit covers four key topics: digital rights, online privacy, internet copyright, and the impact of screen usage.



United Kingdom: regulation of VSP

From 1 November 2020 in UK, video sharing platforms (VSP) must take steps to protect the general public from “harmful content” and minors from “restricted material”. As a support tool, Ofcom released on 24 March 2021 a [*Guidance for VSP on measures to protect user from harmful*](#), open for public consultation. This guidance provides: indicators to identify harmful and restricted material, best practices, recommendations and issues to be taken into account by VSP, key principles when implementing protection measures (such as impartiality, user’s rights, usability, efficiency, transparency, etc.).

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Main sources:

- CAC: the Council's own data.
- Barlovento Comunicación: [monthly audience reports](#).
- EGM: 1st sweep 2021. Catalonia data.
- Iconography: [Noun Project](#), [Freepik](#), [Idescat](#)

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