



Butlletí d'informació sobre l'audiovisual a Catalunya

**(Newsletter on the Media in
Catalonia)**

FIRST FOUR MONTHS OF 2016
Number 4. May 2016

Summary

Media penetration in Catalonia

Television



Breakdown of TV channels in Catalonia	5
Breakdown of Catalan TV channels	6
Breakdown of Spanish TV channels	7
Breakdown of local TV channels	8
Public local television	9
Private local television (1)	10
Private local television (2)	11
Television penetration	12
Television audiences (1)	13
Television audiences (2)	14
Television audiences (3)	15
Television audiences: highest ratings	16
Specialty pay TV audiences	17
Pay TV subscribers	18
Broadcasting news (1)	19
Broadcasting news (2)	20
Broadcasting news (3)	21

Radio



Breakdown of radio broadcasters in Catalonia	23
Public radio	24
Private radio (1)	25
Private radio (2)	26
Radio penetration	27
Radio audiences (1)	28
Radio audiences (2)	29

3

Radio audiences (3)	30
Radio audiences by time slot	31

Internet



Internet user profiles in Catalonia	32
Consumption of online audiovisual content (1)	33
Consumption of online audiovisual content (2)	34
Consumption of online audiovisual content (3)	35
Consumption of online audiovisual content (3)	36

Note



OTT media services (1)	37
OTT media services (2)	38
OTT media services (3)	39
OTT media services (3)	40

Newsflashes



Newsflashes	41
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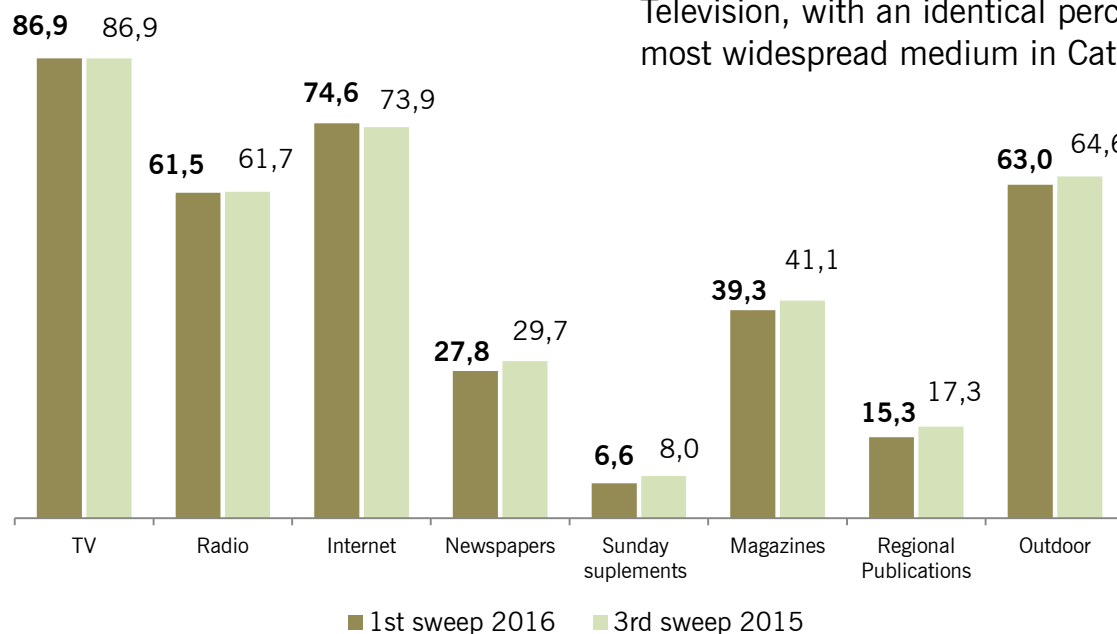
Media penetration in Catalonia

Media penetration in Catalonia

(% of total population)

No significant changes have been detected compared with the previous sweep. The downward trend continues in paper-based publications (newspapers, magazines, supplements) as internet penetration grows.

Television, with an identical percentage to the previous sweep, is still the most widespread medium in Catalonia.



Note: penetration reflects the share of each medium's audience in relation to the total population.

The graph contains responses regarding the following periods and media:

- Newspapers (physical), radio (Monday-Sunday), television and the internet; audience for the day prior to the interview.

- Supplements and outdoor: audience for the week.

- Magazines and county publications: audience for the period of the publication.

Source: EGM – Catalonia data – 1st sweep of 2016.

During the first 4 months of 2016 Catalans watched television for 242 minutes a day, around four hours a day, according to Kantar Media.



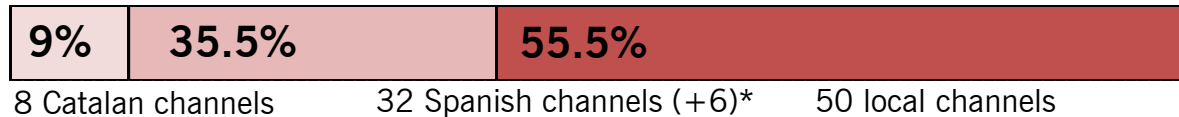
According to EGM, 92.8% of those connecting to the internet do so on a daily basis. This figure is even higher among the population aged under 44.



Breakdown of TV channels in Catalonia

90 TV channels

By service zone (in % and number of DTT channels openly broadcast)



* Including the private Spanish channels granted a licence in the latest DTT tender in October 2015 (see slide 7)

By ownership



Catalan households receive between 41 and 44 free channels:

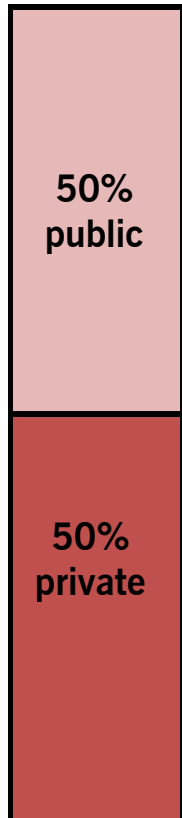
With the appearance of new channels, the average per Catalan household is 8 at the level of Catalonia, 32 at the level of Spain and between 1 and 4 at a local level, depending on the province.

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 Industry, Energy and Tourism (Spanish DTT channels).
April 2016.

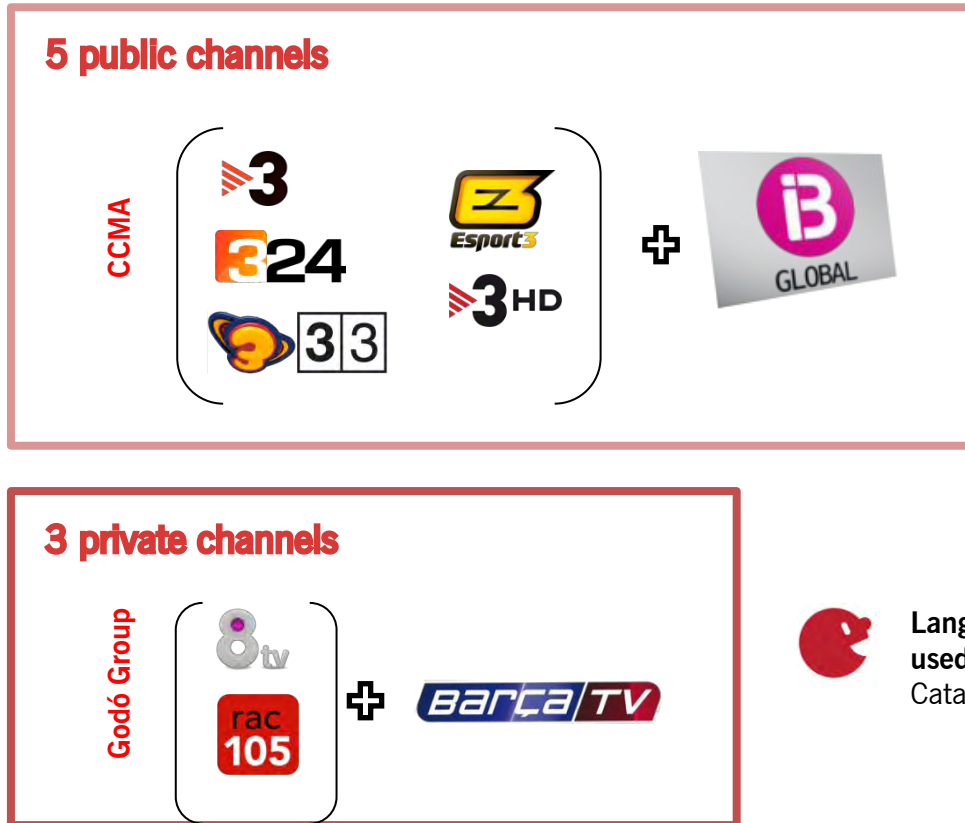
Catalan TV channels

8 Catalan channels

By ownership
(% of DTT channels)



By supply
(number of DTT channels)



 **Language used:**
Catalan

 **Language used:**
Catalan

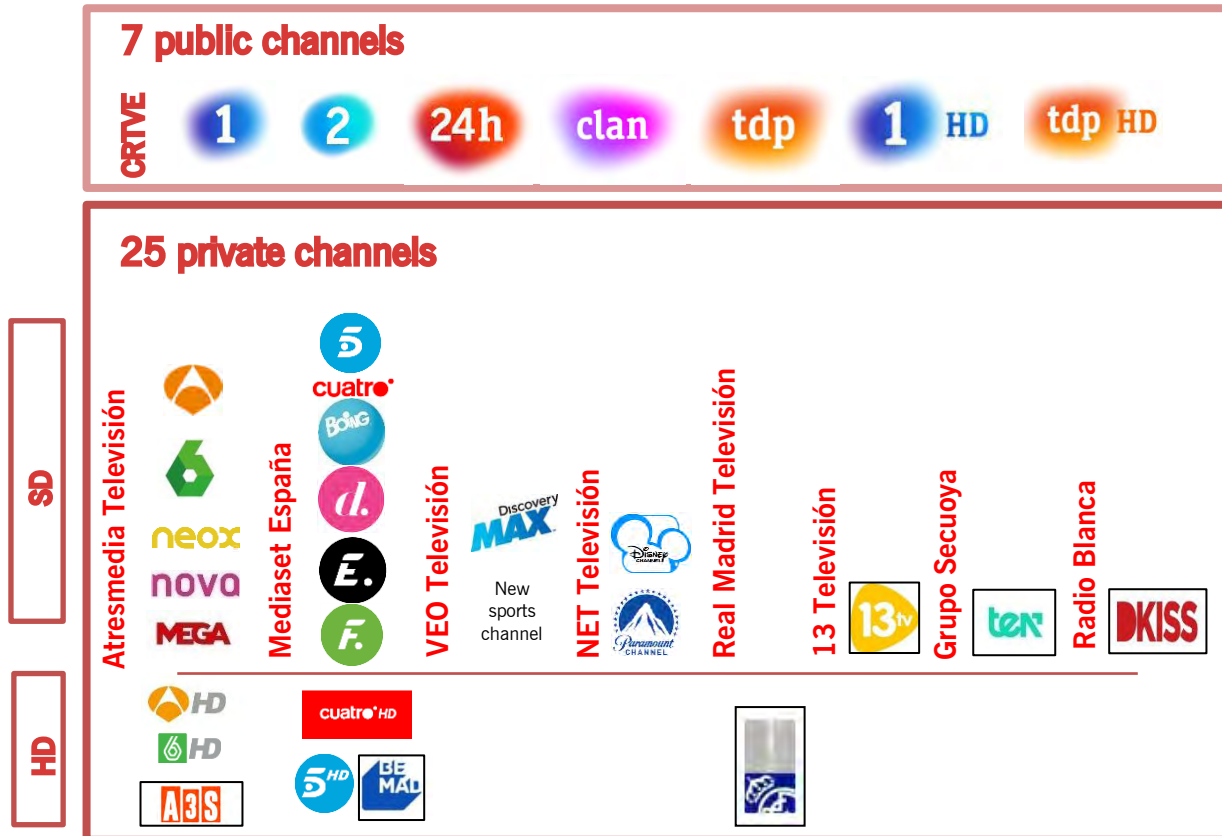
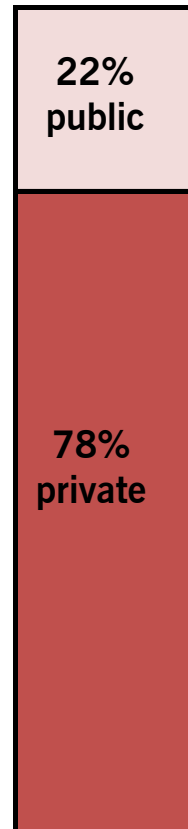
Notes: Since 2015 TV3HD has been broadcast via the private MUX of the Godó Group, under lease. Not included in this figure, the public service provided by the Balearic channel, IB3 Global, has been added, seen in Catalonia since April 2016 via reciprocal broadcasts.
Source: Catalan Audiovisual Council. April 2016.

Spanish television channels

32 Spanish channels

By ownership
(% of DTT channels)

By supply
(number of DTT channels)



Language used:
Spanish
(except for regional sections)

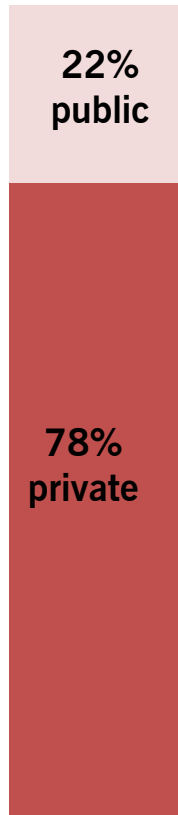
Language used:
Spanish

Note: In bold, the channels granted a licence in the latest DTT tender in October 2015 are surrounded by a black box.
Source: Catalan Audiovisual Council and corporate websites of audiovisual communication service providers. April 2016.

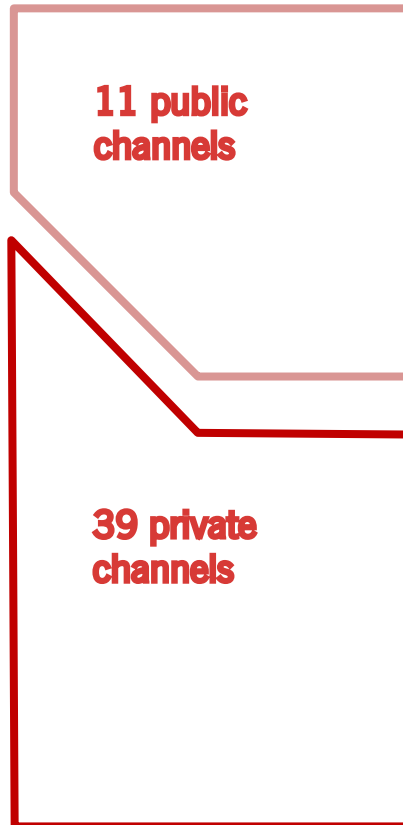
Local TV Channels

50 local channels

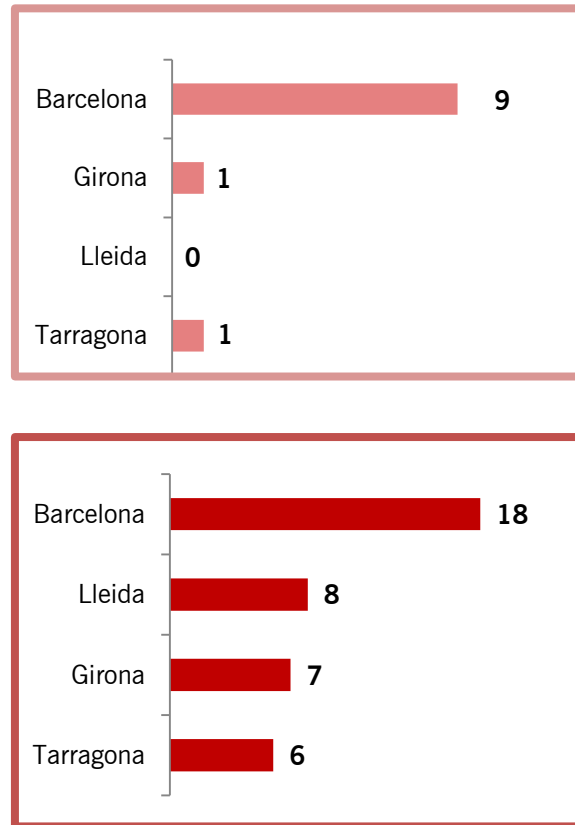
By ownership
(% of DTT channels)



By supply
(number of DTT channels)



By province
(number of DTT channels)



 **Language used:**
Catalan

 **Language used:**
Catalan

Font: Catalan Audiovisual Council. April 2016.

Public local television

Supply of public local TV in Catalonia
(DTT channels)

11 public channels



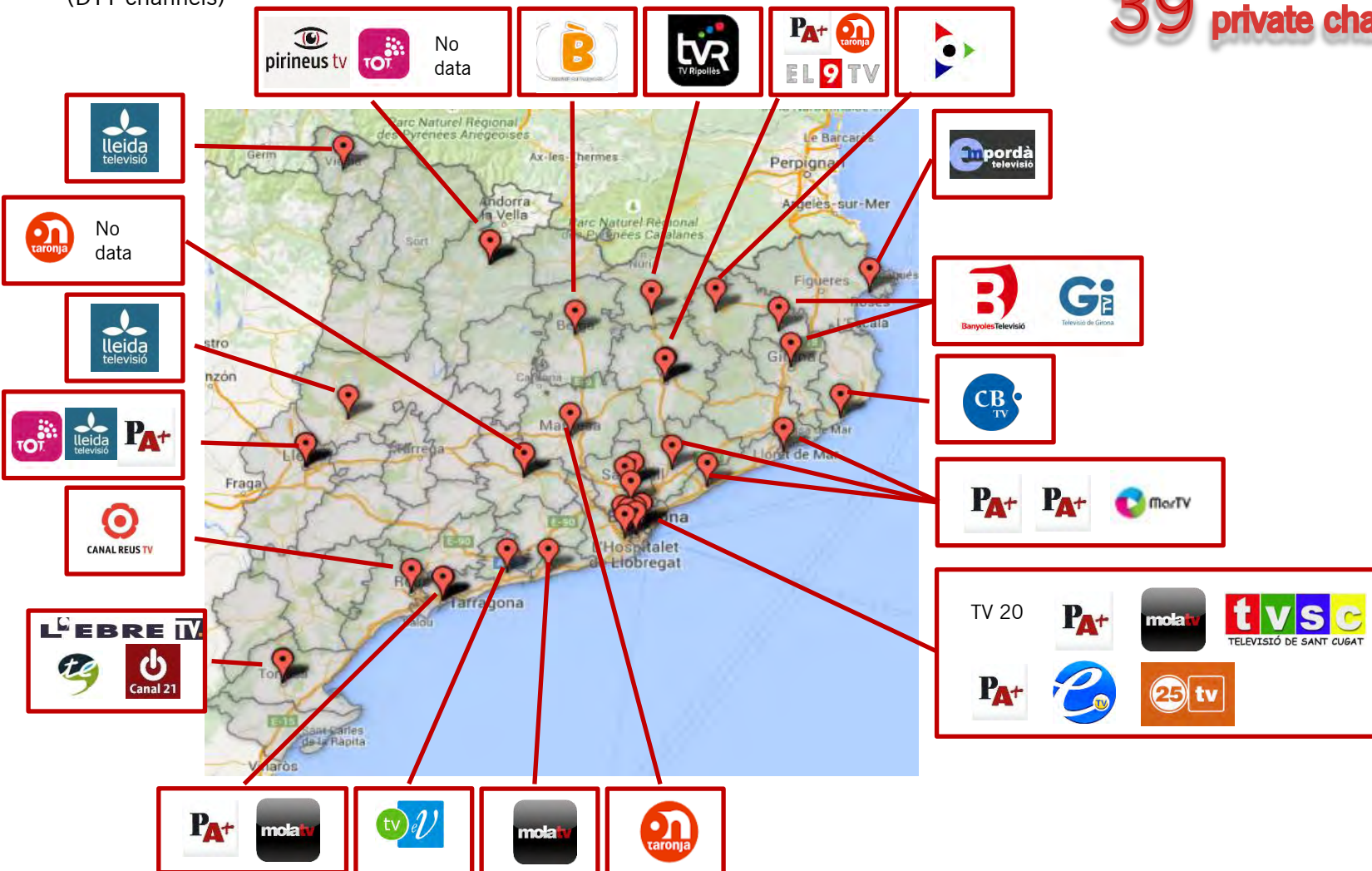
The programming of Ràdio i Televisió d'Andorra (ATV) is broadcast on the public local DTT channel in the area of Seu d'Urgell.

Source: Catalan Audiovisual Council. April 2016.

Private local television (1)

Supply of private local TV in Catalonia
(DTT channels)

39 private channels



Source: Catalan Audiovisual Council. April 2016.

Private local television (2)

Main private local media groups in Catalonia
(by number of channels)

HERMES COMUNICACIONS

PA+ 7 channels

El Punt Avui TV
El Punt Avui



SEGRE

 4 channels

Lleida TV
Tot TV
El Segre



MOLA

 3 channels

Mola TV
Digital Hits



TAEUS

 3 channels

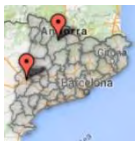
Canal Taronja



CADENA PIRENAICA

 2 channels

Pirineus TV
Tot TV
Proxima



L'EBRE

 2 channels

Ebre TV
Canal TE
L'Ebre
Imagina Ràdio



Six out of every ten private local TV channels form part of a municipal or supra-municipal media group.

CORISA MEDIA GRUP

 **corisa 1** channel

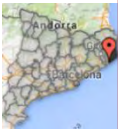
TV Ripollès
Ràdio Ripoll



CB GLOBAL MEDIA

 1 channel

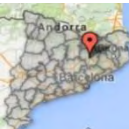
TV Costa Brava
Joy FM



ETV

 1 channel

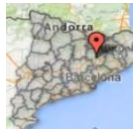
ETV
30 graus
Edigital
Eràdio



PROSA

 **EL 9 NOU1** channel

EI 9 TV
EI 9 FM

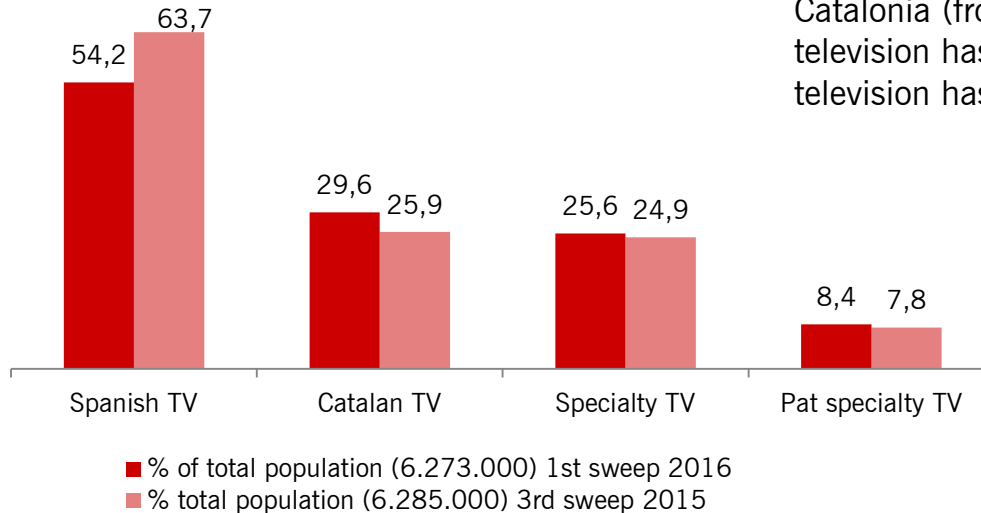


Source: Catalan Audiovisual Council. April 2016.

Television penetration

Penetration

(%, day prior to interview)



Catalan TV channels have increased their penetration in Catalonia (from 25.9 to 29.6%). General Spanish television has decreased but free and pay specialty television has increased.

Spanish TV: La 1, La 2, Antena 3 TV, La Sexta, Telecinco and Cuatro.

Catalan TV: TV3, Super3/33, 3/24, Esport3 and 8tv.

Specialty TV: main free specialty channels (FDF, Divinity, Energy, Boing, Neox, Nova, 24h, Teledeporte, 24h, etc.).

In spite of the penetration of television in Catalan in the first four months of 2016, Spanish is still the main language for TV content in Catalonia.

The penetration of Catalan TV channels is higher in the areas of Lleida (42.4%) and Girona (42.1%) than those in Tarragona (32.9%) and Barcelona (26.5%).

Note: given that a TV viewer tends to watch more than one channel during the same day, the data are processed taking into account the fact that more than one answer is possible. This explains why the sum of the percentages is more than 100%.

Source: EGM – Catalonia data – 1st sweep of 2016.

Television audiences (1)

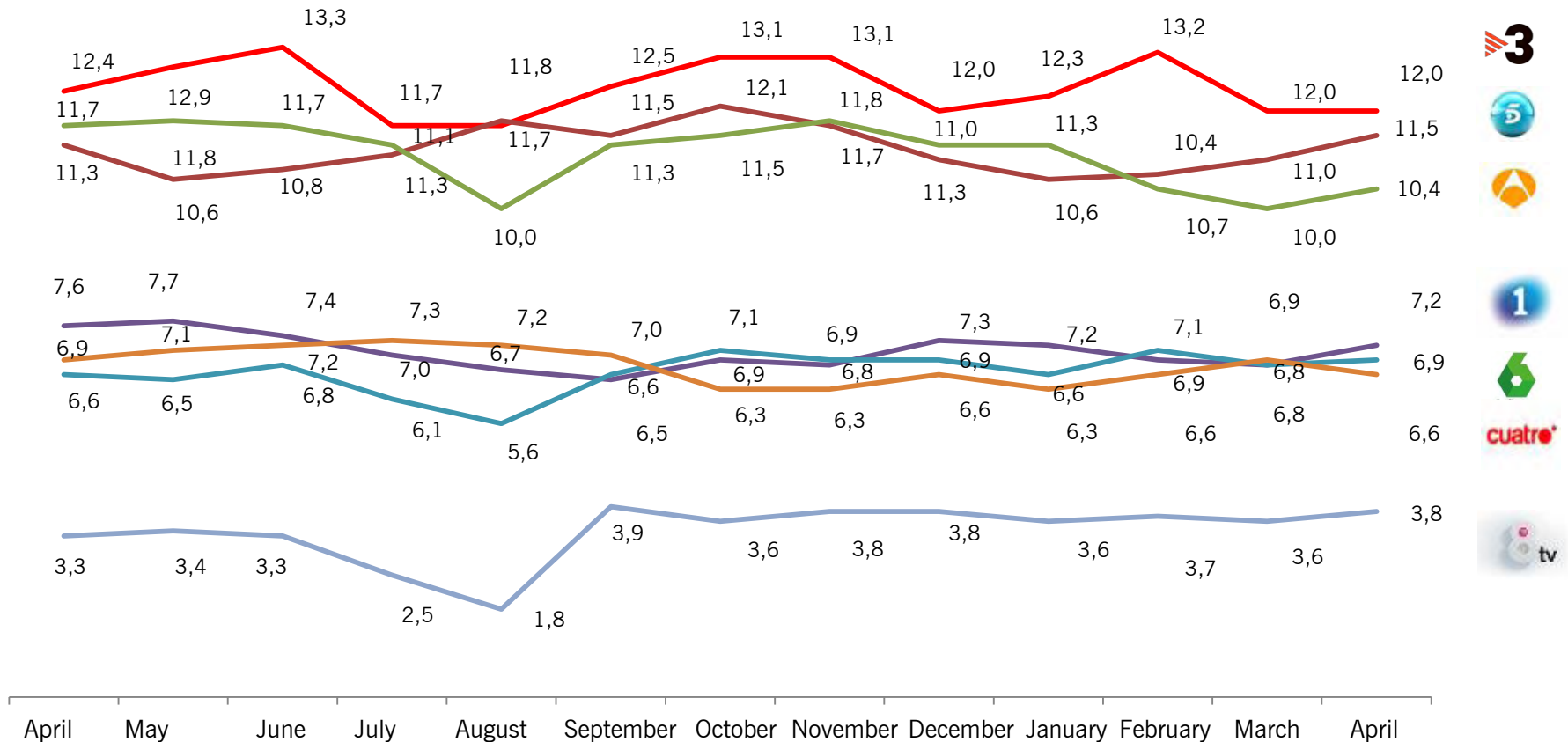
Monthly share in Catalonia (% by channel, January-April 2016, in descending order according to April's ranking)

	JANUARY	FEBRUARY	MARCH	APRIL
TV3	12,3	13,2	12,0	12,0
Telecinco	10,6	10,7	11,0	11,5
Antena 3 TV	11,3	10,4	10,0	10,4
Specialty pay TV	6,8	7,1	7,5	7,7
La1	7,2	6,9	6,8	7,2
laSexta	6,6	7,1	6,8	6,9
Cuatro	6,3	6,6	6,9	6,6
8tv	3,6	3,7	3,6	3,8
Factoría de Ficción	2,9	2,6	3,0	3,0
Divinity	2,5	2,6	2,7	2,7
Neox	2,6	2,9	2,9	2,6
La2	2,0	2,0	2,1	2,0
Clan	1,6	1,8	1,9	2,0
Nova	2,0	1,9	1,9	1,9
Discovery Max	1,8	1,9	1,9	1,8
Paramount Channel	2,0	2,0	2,0	1,7
Energy	1,7	1,7	1,8	1,7
13 TV	1,7	1,6	1,3	1,7
Mega	1,8	1,8	1,8	1,6
3/24	2,1	1,5	1,6	1,5
Esport3	1,3	1,2	1,3	1,3
Super3/33	1,3	1,3	1,4	1,2
Boing	1,4	1,1	1,1	1,1
Disney Channel	0,9	0,9	0,8	0,7
24h	0,6	0,7	0,7	0,6
Other series	0,6	0,6	0,6	0,6
Teledporte	0,5	0,4	0,5	0,4
RAC 105	0,2	0,2	0,3	0,2
Be Mad (from April)				0,1

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: CAC, based on data from Kantar Media.

Television audiences (2)

Monthly trend in the share of the main channels in Catalonia
(%, from April 2015 to April 2016)

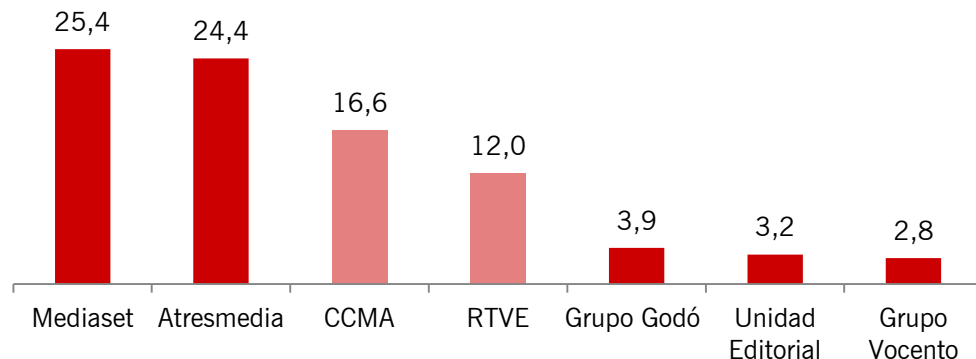


Source: CAC, based on data from Kantar Media.

Television audiences (3)

Audience share in Catalonia

(% by group, average January-April 2016)



MEDIASETespaña.



ATRESMEDIA



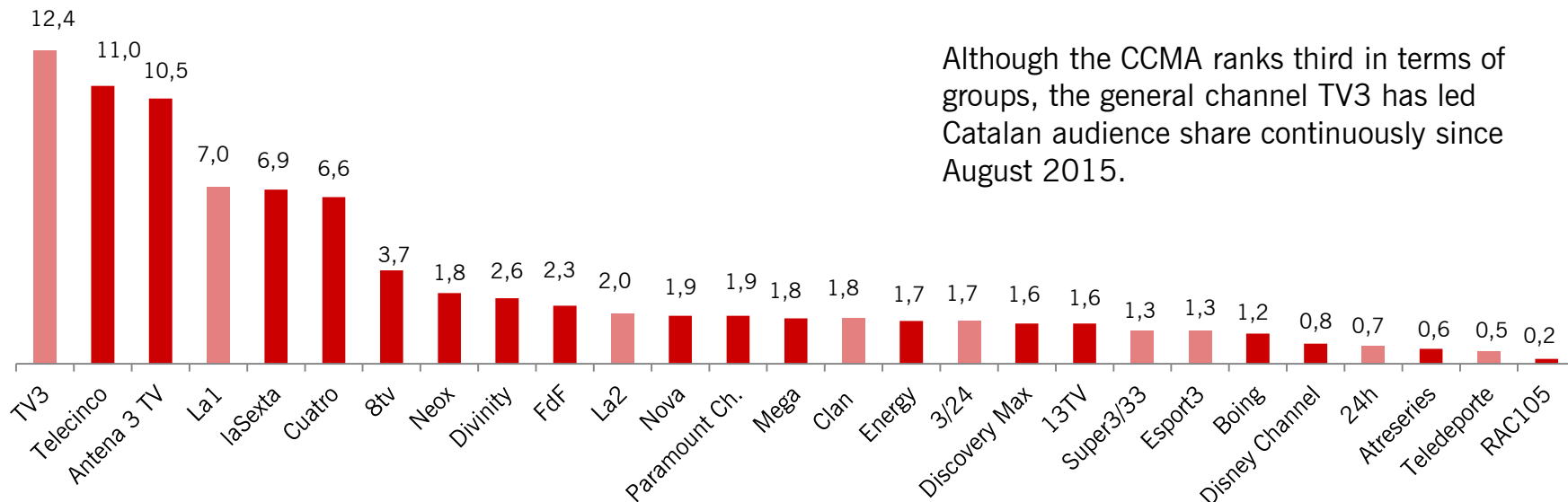
Together, Mediaset and Atresmedia have a 50% audience share in Catalonia. The public channels owned by the Corporació Catalana de Mitjans Audiovisuals rank third but quite a long way behind these two private Spanish groups.

The TV groups broadcasting in Catalan, CCMA and Godó, account for 20% of Catalan audiences.

Although the CCMA ranks third in terms of groups, the general channel TV3 has led Catalan audience share continuously since August 2015.

Audience share in Catalonia

(% by channel, average January-April 2016)



Source: CAC, based on data from Kantar Media.

Television audiences: highest ratings

Ranking of the programmes with the highest audience ratings in Catalonia

January 2016

Programme	Channel	Date	AM(ooo)	Share (%)
Polònia		16/01/16	807	26.2
Lunchtime news		07/01/16	658	30.7
El foraster. Castellfollit de la Roca		20/01/16	655	24.5
Polònia		21/01/16	653	19.7
El foraster. Cases d'alcanar		13/01/16	649	22.5
Evening news		28/01/16	645	21.9
Lunchtime news		13/01/16	639	31.7
Evening news		12/01/16	619	18.9
El foraster. Hospital U. Vall d'Hebron		04/01/16	614	19.4
Lunchtime news		18/01/16	613	31.2

March 2016

Programme	Channel	Date	AM(ooo)	Share (%)
El foraster. Organyà		02/03/16	750	24.8
El foraster. Maçanet de Cabrenys		09/03/16	748	24.3
El foraster. La Vall d'Assua		30/03/16	621	20.4
Lunchtime news		07/03/16	610	31.7
APM?		09/03/16	608	17.3
Lunchtime news		09/03/16	607	31.6
Polònia		10/03/16	604	19.4
Weekend evening news		06/03/16	597	18.4
Polònia		03/03/16	593	18.9
El foraster. Ventalló		23/03/16	587	21.9

February 2016

Programme	Channel	Date	AM(ooo)	Share (%)
Champions League: Arsenal-Barcelona		23/02/16	1,168	34.9
El foraster. Castellar de N'Hug		17/02/16	829	27.4
Polònia		25/02/16	737	22.0
Salvados. Fashion victims		21/02/16	715	20.8
Polònia		18/02/16	701	21.3
APM?		17/02/16	690	20.6
El foraster. Poblenou del Delta		24/02/16	689	22.7
Weekend evening news		27/02/16	686	24.9
Weekend evening news		21/02/16	683	21.1
Evening news		18/02/16	653	22.2

April 2016

Programme	Channel	Date	AM(ooo)	Share (%)
Champions League: Barcelona-At. Madrid		05/04/16	1,375	38.9
Champions League: Manchester C.-R. Madrid		26/04/16	777	25.8
Champions League: Barcelona-At. Madrid		05/04/16	756	21.4
Salvados: Una hora en la Moncloa		03/04/16	726	21.4
Desmuntant Polònia		07/04/16	725	22.3
Champions League: R. Madrid-Wolfsburg		12/04/16	687	23.3
30 minuts. Trànsit		10/04/16	684	19.7
El foraster. Viladrau		06/04/16	676	22.1
Lunchtime news		05/04/16	626	31.3
La que se avecina. Una sonàmbula, un hombre florero y un ácaro en chandal		05/04/16	590	22.3

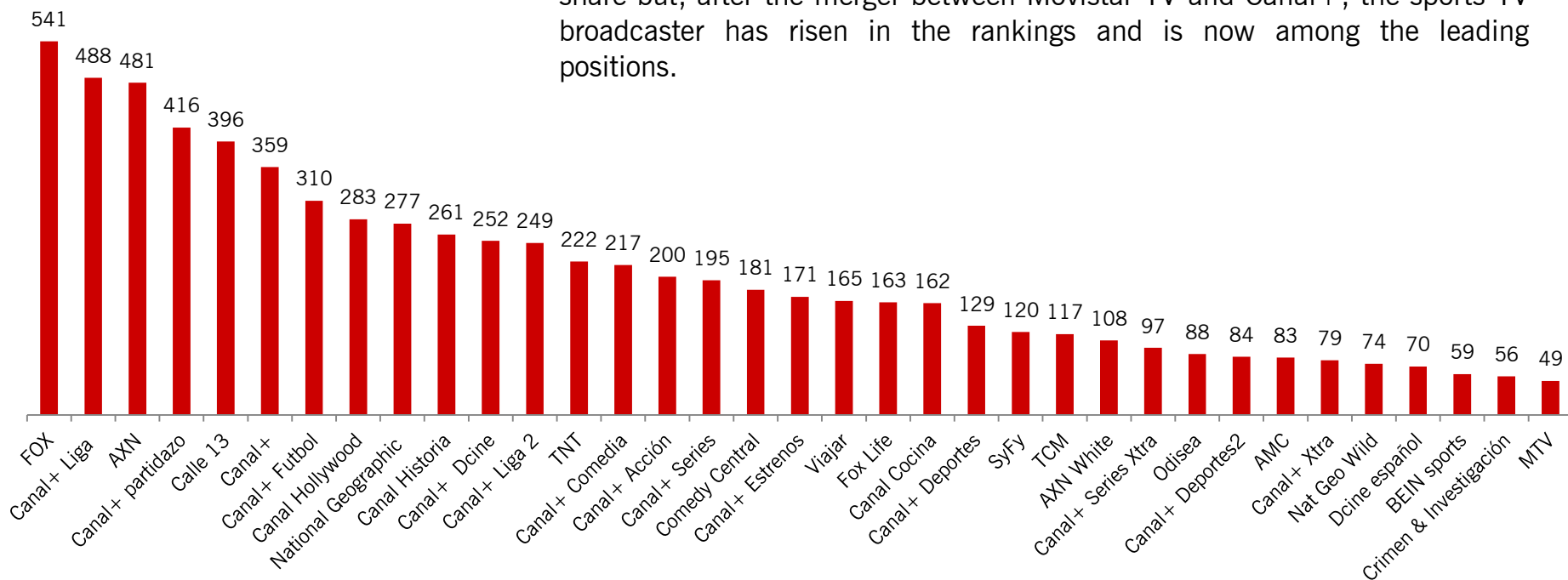
Note: only the match is considered in the case of football broadcasts, not the programme before or after the game.
Source: CAC, based on data from Kantar Media.

Specialty pay TV audiences

Accumulated audiences for specialty pay TV channels in Catalonia
(in thousands, last 30 days)

According to EGM, pay TV has a penetration of 8.4% among the Catalan population.

Compared with the previous BIAC, FOX still has the largest Pay TV audience share but, after the merger between Movistar TV and Canal+, the sports TV broadcaster has risen in the rankings and is now among the leading positions.



Source: EGM – Catalonia data – 1st sweep of 2016.

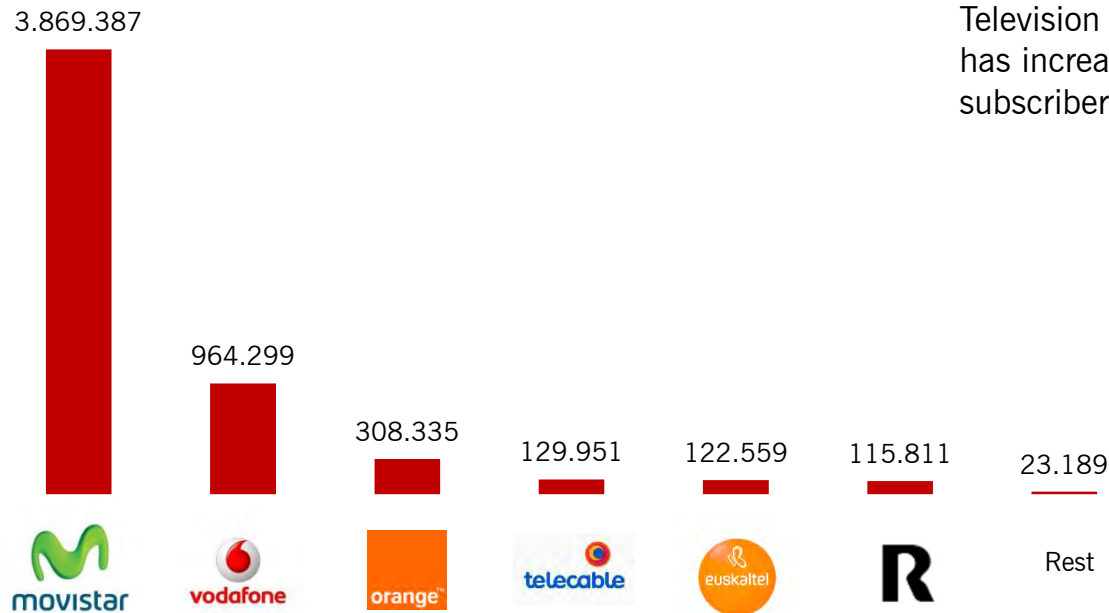
Pay TV subscribers

**Total number of subscribers:
5,533,531**

Number of pay TV subscribers in Spain
(data from the fourth quarter of 2015)

At the end of 2015 there were more than 5.5 million Pay TV subscribers in Spain.

Television distributed by the XDSL/FTTH networks has increased the most, with almost 900,000 subscribers more than in December 2014.



* Go!TV stopped broadcasting in the third quarter of 2015 and the subscribers for digital terrestrial television therefore disappear.

Source: CNMC. *Informe Trimestral. IV Trimestre de 2015*. http://data.cnmc.es/datagraph/jsp/inf_trim.jsp

Broadcasting news (1)

Changes in the DTT spectrum

Between December 2015 and April 2016 five of the six TV channels granted a licence by the Spanish government in October 2015 began broadcasting.

The sixth is 13tv, whose channel had been leased to Unidad Editorial but now has its own licence after the 2015 tender. Consequently, it only needed to change frequency, occurring in March.

Also in March, Unidad Editorial reached an agreement with Mediapro to lease this frequency again, planned for a sports channel.

Date broadcasts started

		
19/03/2016	28/04/2016	28/04/2016
		
21/04/2016	22/12/2015	28/04/2016

Canal+ disappears and #0 appears

On 1 February #0 started up, the new Movistar+ channel which replaces Canal+, available for the clients of this pay TV television platform



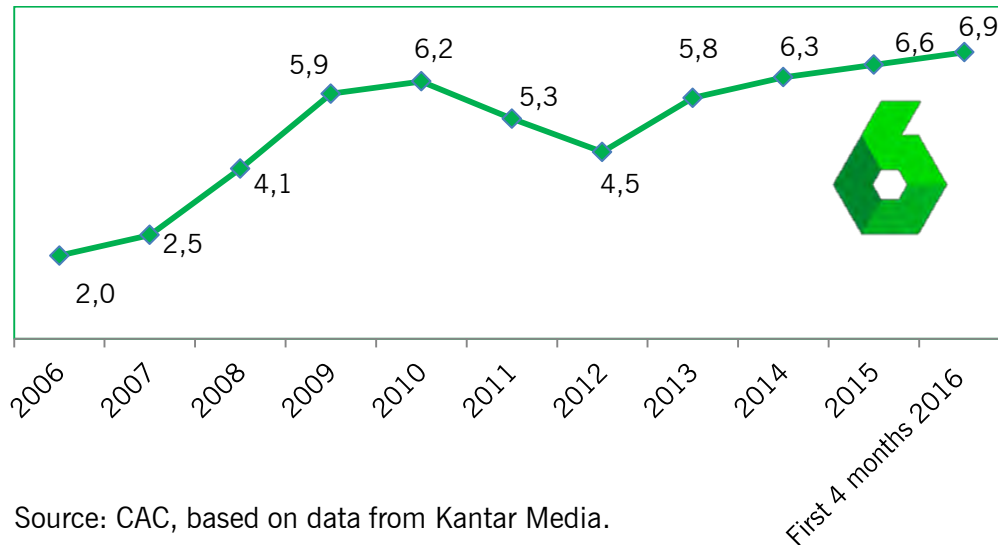
IB3 Global is broadcasting again

Since 15 April TV sets in Catalonia can once again receive broadcasts by IB3 Global, IB3's exterior channel. Viewers only need to resynchronise their sets as this is located on the same multiplex as the CCMA TV channels.



Broadcasting news (2)

Trend in audience share of laSexta in Catalonia. Period 2006-2016



Source: CAC, based on data from Kantar Media.

10th anniversary of laSexta

laSexta started broadcasting in March 2006 and, since then, has gradually increased its audience share in Catalonia.

Some of its programmes, such as *Salvados*, presented and directed by Jordi Évole, and other news magazine programmes, have the highest audience share in Catalonia in the monthly rankings.



Years and years... 25

In February Televisió de Catalunya's children's channel celebrated its 25th anniversary. In Catalonia there are currently half a million children with a Súper membership card. This broadcasts on the same channel as 33 and the average audience share is 1.5%, according to Kantar Media, reaching almost 6% among TV viewers aged between 4 and 12.

Broadcasting news (3)

Polònia, ten years of political satire

Polònia, TV3's satirical political programme, has been part of its programming for the last 10 years and leads the prime time audience ratings on Thursdays in Catalonia.

Its anniversary was celebrated on 7 April with a special programme, *Desmuntant Polònia*, which brought together impersonators and the celebrities they impersonate, achieving an audience of 725,000 viewers and a share of 22.3%, according to Kantar Media. This has also been the most widely seen video on the internet for the month, with 87,679 viewings.

Polònia seasons	AM (000)	Share %	Broadcasts
1st season	728	25,5	21
2nd season	766	25,8	40
3rd season	714	25,1	48
4th season	696	22,1	39
5th season	670	22,1	40
6th season	615	20,1	46
7th season	573	18,5	43
8th season	607	19,3	43
9th season	540	17,4	43
10th season	544	17,2	37

* Up to February 2016

Source: CCMA.

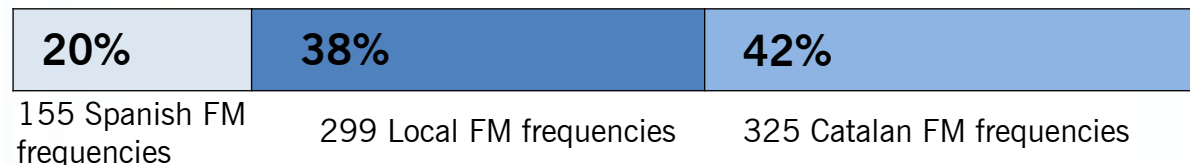




Breakdown of radio broadcasters in Catalonia

779 radio frequencies

By service zone (% and number of FM frequencies)



By ownership



Catalan homes receive more than 30 FM broadcasters:

10 at the level of Catalonia and 20 at the level of Spain, in addition to local or municipal broadcasters.

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

Source: Catalan Audiovisual Council (local FM), CCMA (Catalan FM) and the Ministry of Industry, Energy and Tourism (Spanish FM). April 2016.

Public radio

580
public frequencies

By service zone
(% and number of
FM frequencies)

12% (72)
Spanish

41%
(236)
Spanish

47%
(272)
local

By supply
(FM broadcasters)

**5 Spanish
broadcasters**



**Language
used:**
Spanish
(except Ràdio 4)

**3 Catalan
broadcasters**



**Language
used:**
Catalan

**272 local
broadcasters**

(example broadcasters)



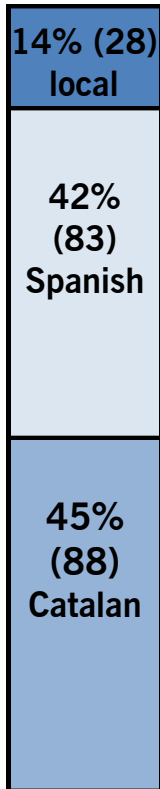
**Language
used:**
Catalan

280 public broadcasters

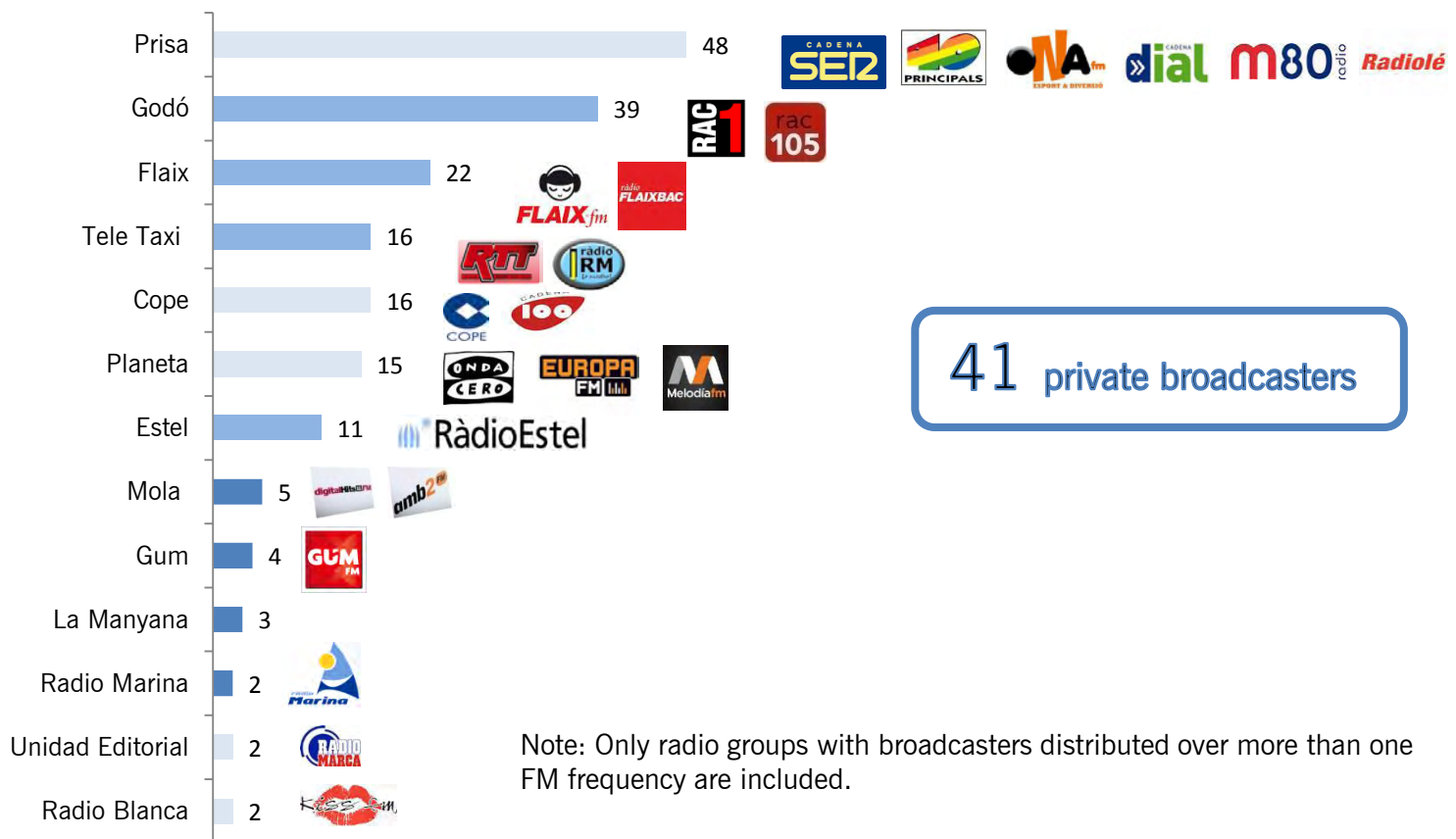
Source: Catalan Audiovisual Council based on data from CCMA (Catalan FM) and the Ministry of Industry, Energy and Tourism (Spanish FM). April 2016.

Private radio (1)

By service zone
(% and number of
FM frequencies)



By radio group
(FM broadcasters)



199
private frequencies

41 private broadcasters

Note: Only radio groups with broadcasters distributed over more than one FM frequency are included.

Source: Catalan Audiovisual Council. April 2016.

Private radio (2)

Private radio supply

(group type, group name and radio product and number of frequencies)

LOCAL AND/OR SUPRA-COUNTY RADIO GROUPS	
Group	Frequencies
MOLA	5
Amb2 FM	1
Digital Hits FM	4
GUM	4
Gum FM	4
LA MANYANA	3
no data	3
RÀDIO MARINA	2
Ràdio Marina	2
COSTA BRAVA GLOBAL MEDIA	1
Joy FM	
PROSA	1
El 9 FM	
EL 3 DE VUIT	1
El 3 de vuit ràdio	
L'EBRE	1
Imagina Ràdio	
CADENA PIRENAICA	1
Pròxima FM	
SIMALRO	1
Ràdio UA1	
MONTSERRAT RTV	1
Montserrat Ràdio	
TOTAL 12 broadcasters	21

RADIO COMPANIES	
Local or supra-county level broadcasters	
Broadcaster	Frequencies
Ràdio Olot	1
Ràdio Ripoll	1
Ràdio Vic	1
Ràdio Aran	1
Hit 103	1
Specialty broadcasters	
Radio Adventista	1
Capital Radio	1
TOTAL 7 broadcasters	7

CATALAN RADIO GROUPS	
Group	Frequencies
GODÓ	39
RAC1	23
RAC105	16
FLAIX	22
Flaix FM	12
Ràdio Flaixbac	10
TELE TAXI	16
Ràdio Tele Taxi	13
Ràdio RM	3
ESTEL	11
Ràdio Estel	11
TOTAL 7 broadcasters	88

SPANISH RADIO GROUPS	
Group	Frequencies
PRISA	48
SER	19
40 Principales	11
Cadena Dial	7
Ona FM	4
Máxima FM	3
M 80	3
Radiolé	1
COPE	16
COPE	8
Cadena 100	4
Rock FM	4
PLANETA	15
Onda Cero	6
Europa FM	6
Melodía FM	3
RADIO BLANCA	2
Kiss FM	2
UNIDAD EDITORIAL	2
Radio Marca	2
TOTAL 15 broadcasters	83

Note: This category includes broadcasters with specialised programming that is not specifically local.

Source: Catalan Audiovisual Council. April 2016.

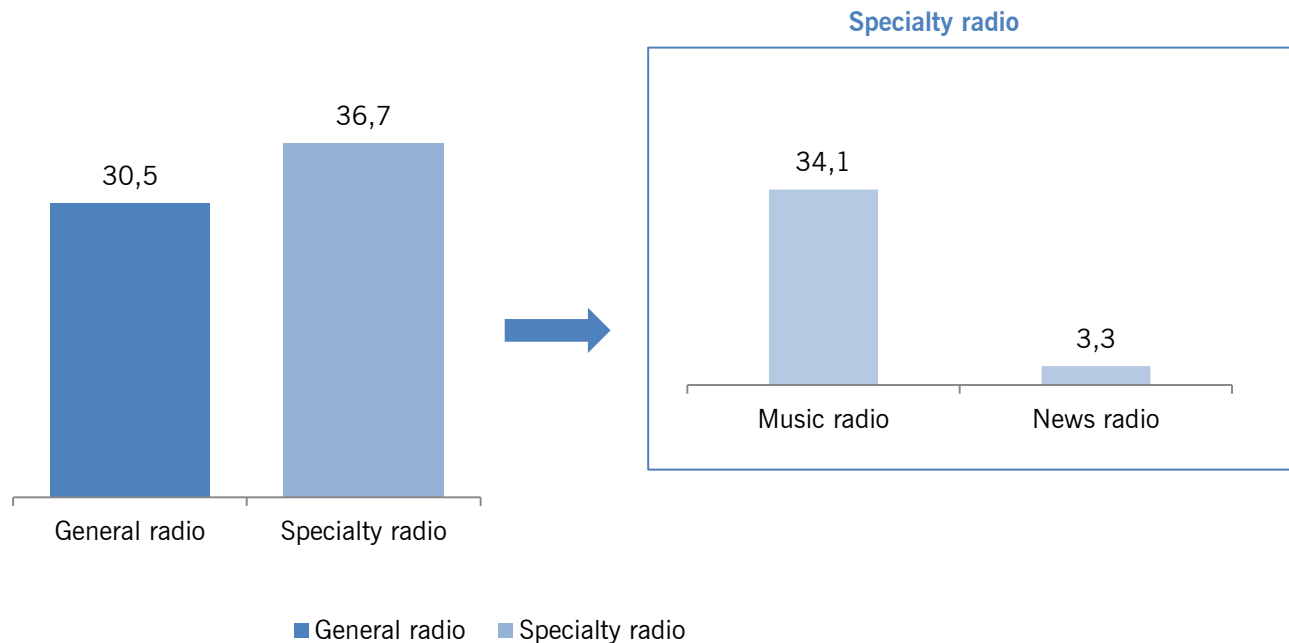
Radio penetration

Radio's penetration among the Catalan population is 61.5%; 65.4% among men and 57.8% among women. This penetration is above average for the population aged 35 to 44 (69.2%) and 45 to 54 (67.4%).

Music radio is the most popular with listeners and also constitutes the majority of the channels.

Penetration

(%, day prior to interview)



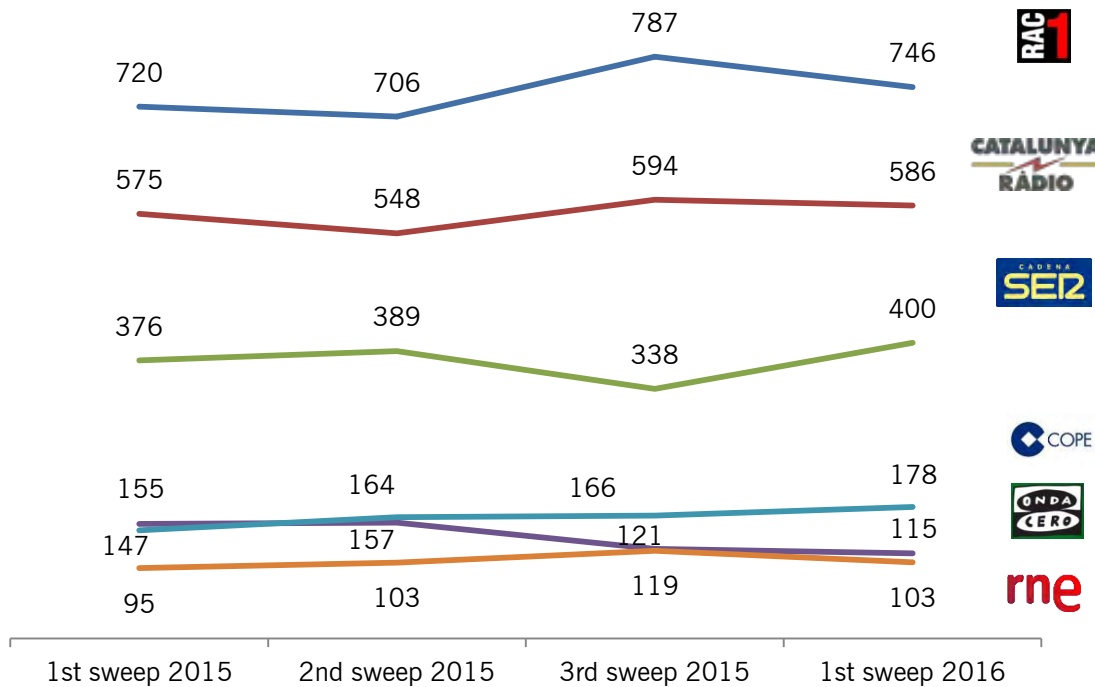
Note: given that radio listeners tend to listen to more than one broadcaster during the same day, the data are processed taking into account the fact that more than one answer is possible. This explains why the sum of the percentages is more than 100%.

Source: EGM – Catalonia data – 1st sweep of 2016.

Radio audiences (1)

General radio ranking. Audiences

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



Although they've lost listeners, RAC1 and Catalunya Ràdio still lead the category of general radio in Catalonia.

The broadcaster gaining the most listeners in this sweep is Cadena SER, in third position.

Music radio in Catalonia is led by Flaixbac and Los 40 Principales

Grup **FLAIX**



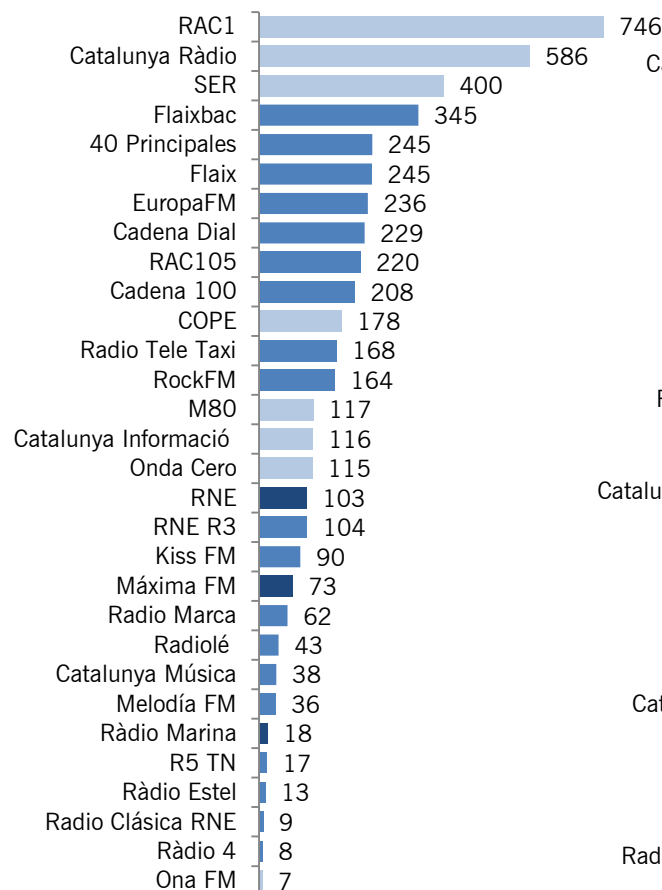
Source: EGM – Catalonia data – 1st sweep of 2016.

Radio audiences (2)

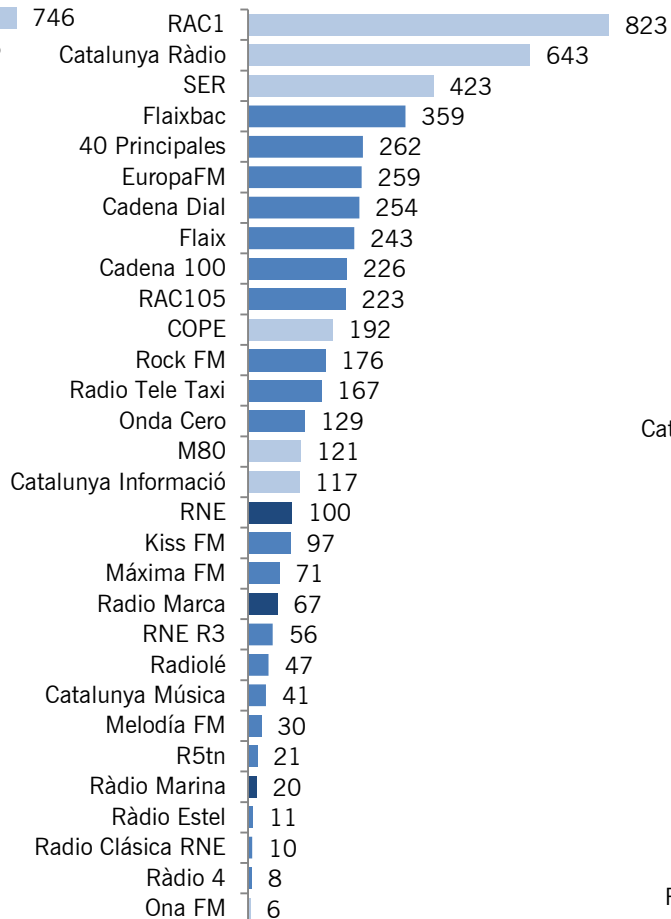
Cumulative daily radio audiences in Catalonia

(in thousands, out of total population, day prior to interview)

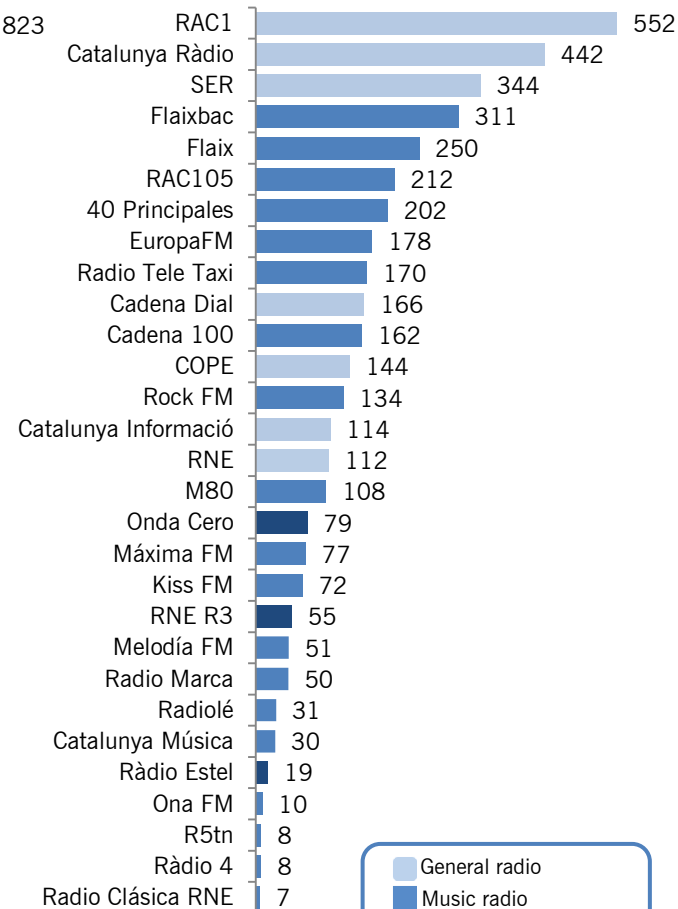
Monday to Sunday



Monday to Friday



Saturday and Sunday



General radio
Music radio
News radio

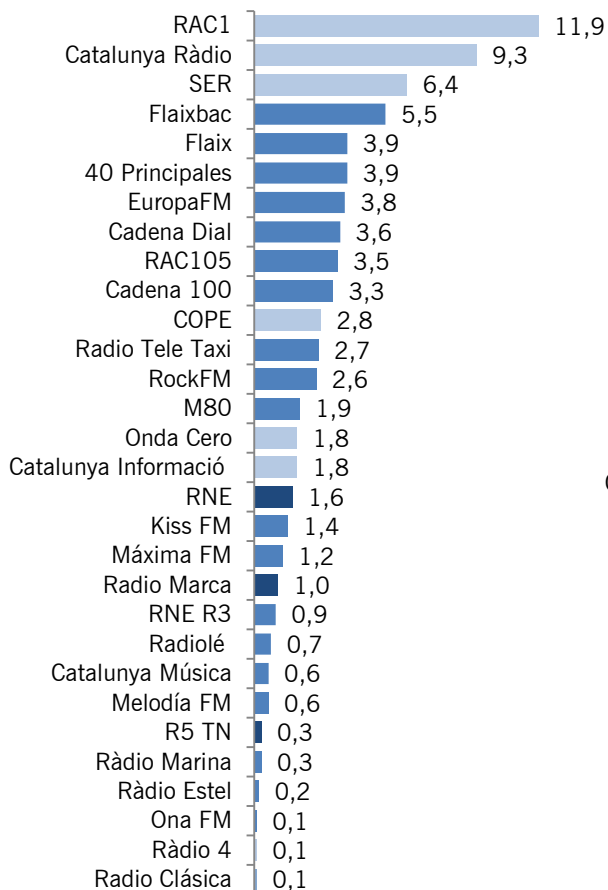
Source: EGM – Catalonia data – 1st sweep of 2016.

Radio audiences (3)

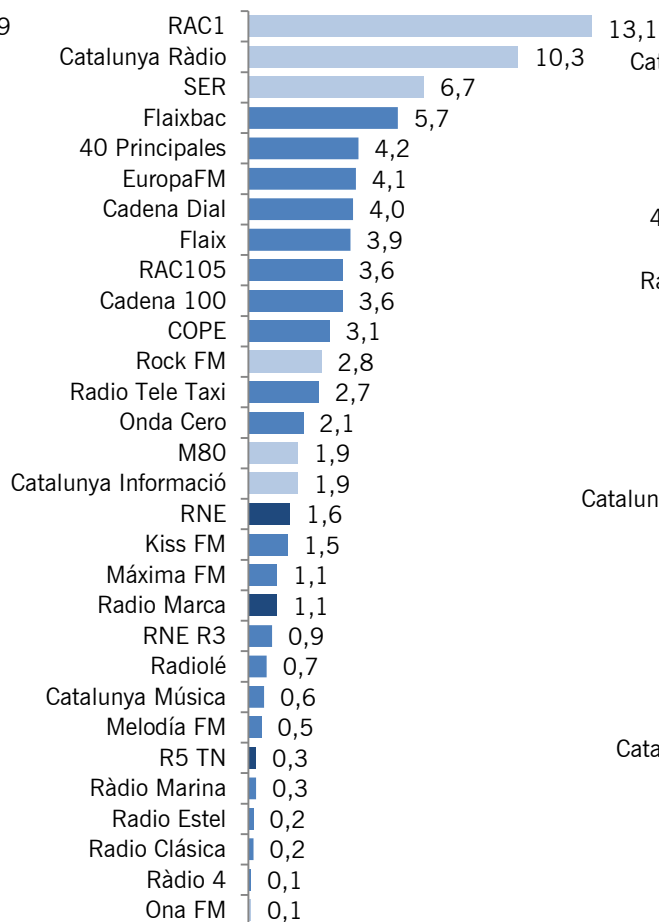
Cumulative daily radio audiences in Catalonia

(% of total population, day prior to interview)

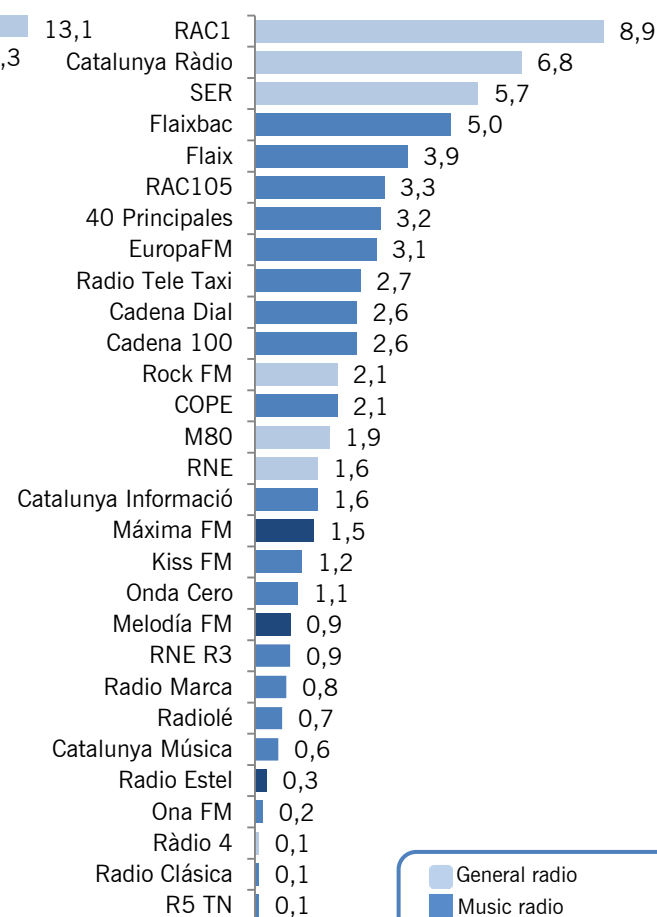
Monday to Sunday



Monday to Friday



Saturday and Sunday



General radio
Music radio
News radio

Source: EGM – Catalonia data – 1st sweep of 2016.

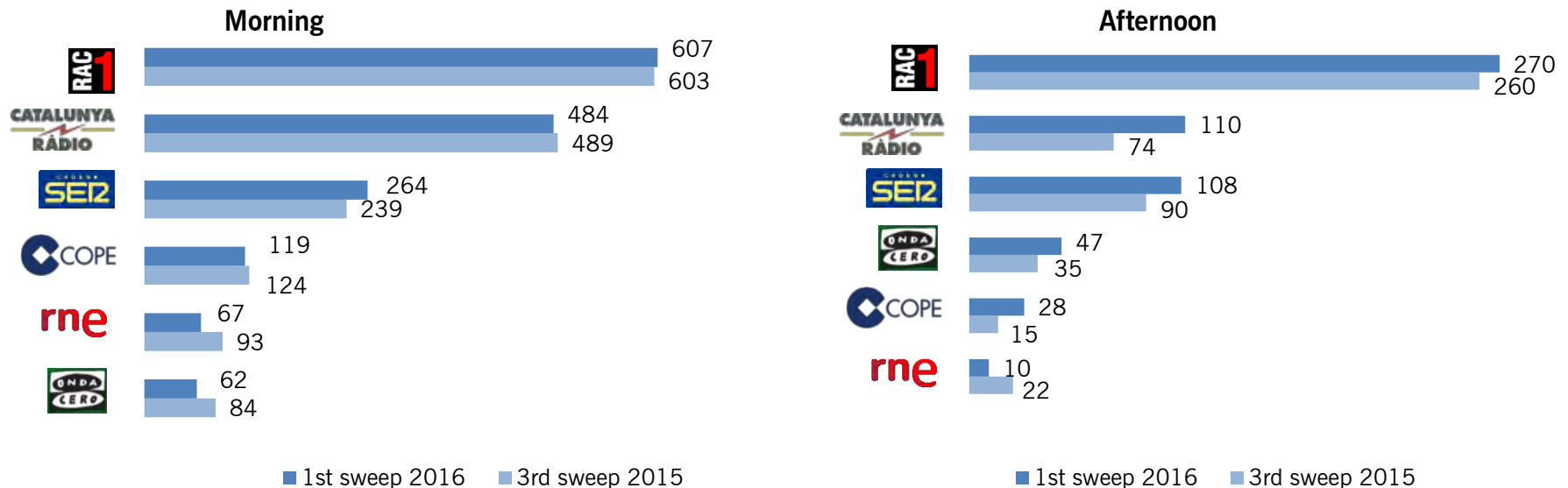
Radio audiences by time slot

RAC1 leads all radio time slots in Catalonia.

CCMA public radio has the most listeners in the afternoon while CRTVE public radio has lost listeners, both in the morning and in the afternoon.

Radio audiences for the morning time slot (from 6 am to 12 midday) and afternoon time slot (from 4 to 8 pm) of the main general channels in Catalonia

(thousands of listeners, Monday to Friday)



Note: the time slots established by EGM do not coincide with the times of the morning and afternoon magazine programmes of different broadcasters. The morning programmes are from 6 am to 12 midday on RNE, COPE, Catalunya Ràdio and RAC1; and from 6 am to 12.30 on Onda Cero and la SER. The afternoon magazine programmes on Onda Cero, Catalunya Ràdio and RAC1 are broadcast from 4 pm to 7 pm; those of COPE and RNE, from 3 to 7 pm, and those of SER, from 4 to 8 pm.

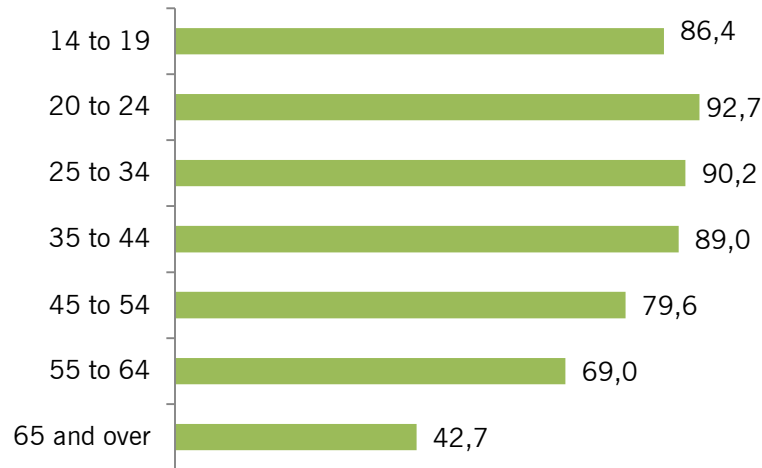
Source: EGM – Catalonia data – 1st sweep of 2016.



Internet

Internet user profiles in Catalonia

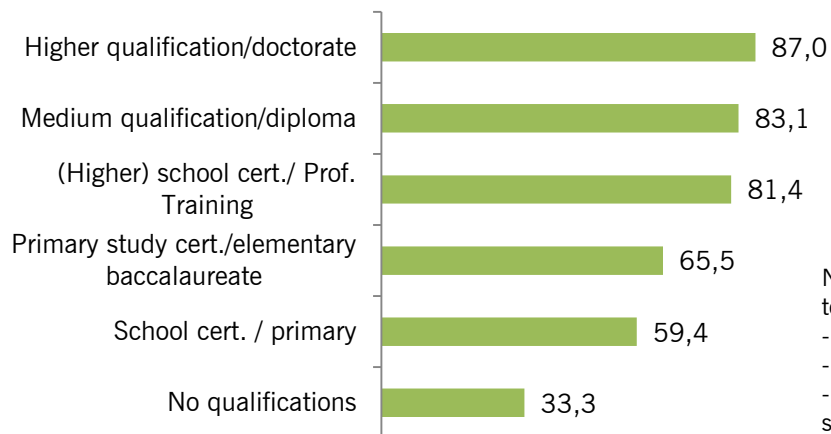
Internet connection by age (% , day prior to interview))



Internet penetration among the Catalan population has risen slightly since the last sweep, going from 73.9 to 74.5%.

Internet use is higher among the younger age segments although the largest percentage increases are among the population aged over 55.

Internet connection by qualifications (% , day prior to interview))



Internet use is greater among those with higher qualifications than among those without qualifications.

Note: given the changes in academic qualifications, people have been assigned, according to their answer and age, to the following categories:

- No qualifications.
- Primary/school certificate/entrance cert./1st cycle secondary
- Basic/ school leaving cert. / elementary baccalaureate / primary study cert./ full secondary
- Higher baccalaureate/School cert, Higher school cert./LOGSE bacc./Prof. Training II
- Diploma (3-year course)
- Graduate, degree, master, doctorate

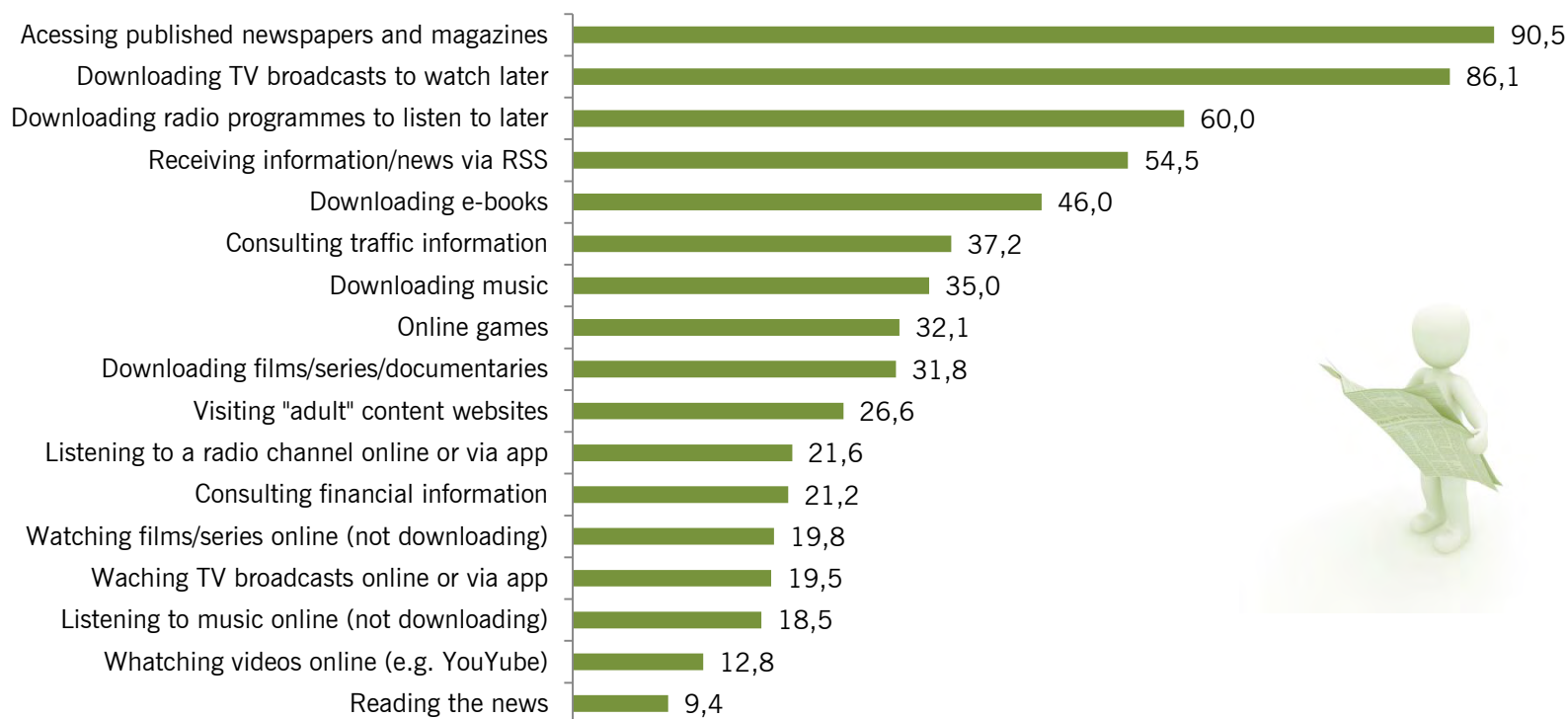
Source: EGM – Catalonia data – 1st sweep of 2016.

Consumption of online audiovisual content (1)

According to AIMC, most internet users continue to watch television on a conventional screen and listen to the radio using a traditional device, in spite of the use of other screens.

Use of the internet to consume audiovisual content in Catalonia

(%) Question: Over the last 30 days, which of the following activities have you carried out on the internet? (Only activities related to audiovisuals have been selected)



Source: AIMC. *18a encuesta Navegantes en la red*. 17,928 online interviews with volunteer internet users throughout Spain.

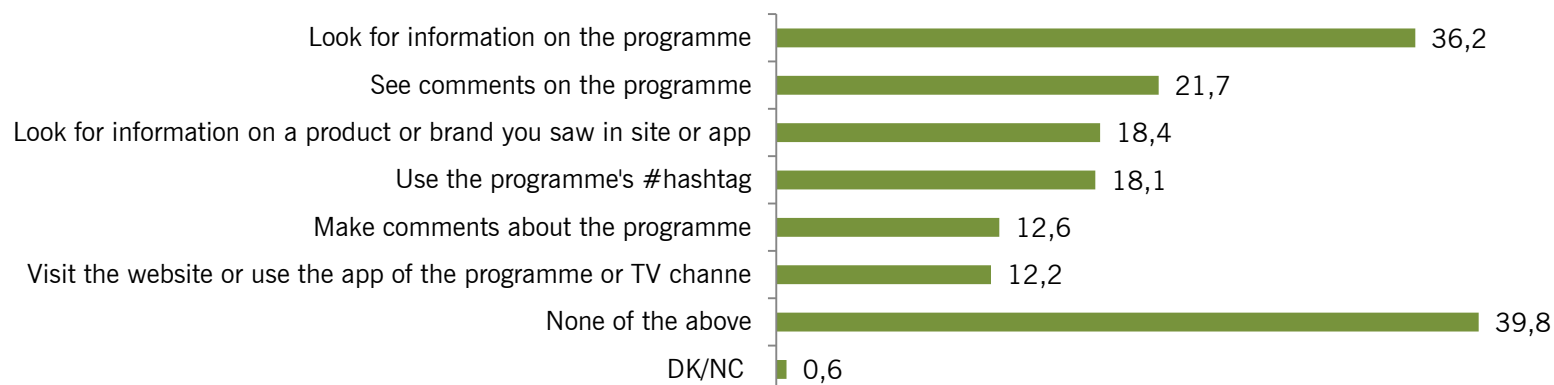
Data for Catalonia provided by AIMC: 2,617 participants, of which 1,889 are male and 721 female (7 gender not identified). Between October and December 2015.

Consumption of online audiovisual content (2)

In Catalonia, more than 72% of internet users use the internet while watching television. Most of them use it to interact with the programme they're watching but almost 40% carry out other activities.

Use of second screens

(%) Question: In the last 30 days, while you were watching a programme on the television, did you do any of the following activities on the internet?



The most widely used social medium is Facebook (85.4%), followed by Twitter (49.6%) and Instagram (38.4%). Almost 53% of the internet users surveyed use an app on their mobile or tablet to watch the *a la carte* television offered by the TV groups themselves (Mitele, Atresplayer, CCMA...) and/or websites that provide access to various TV channels.

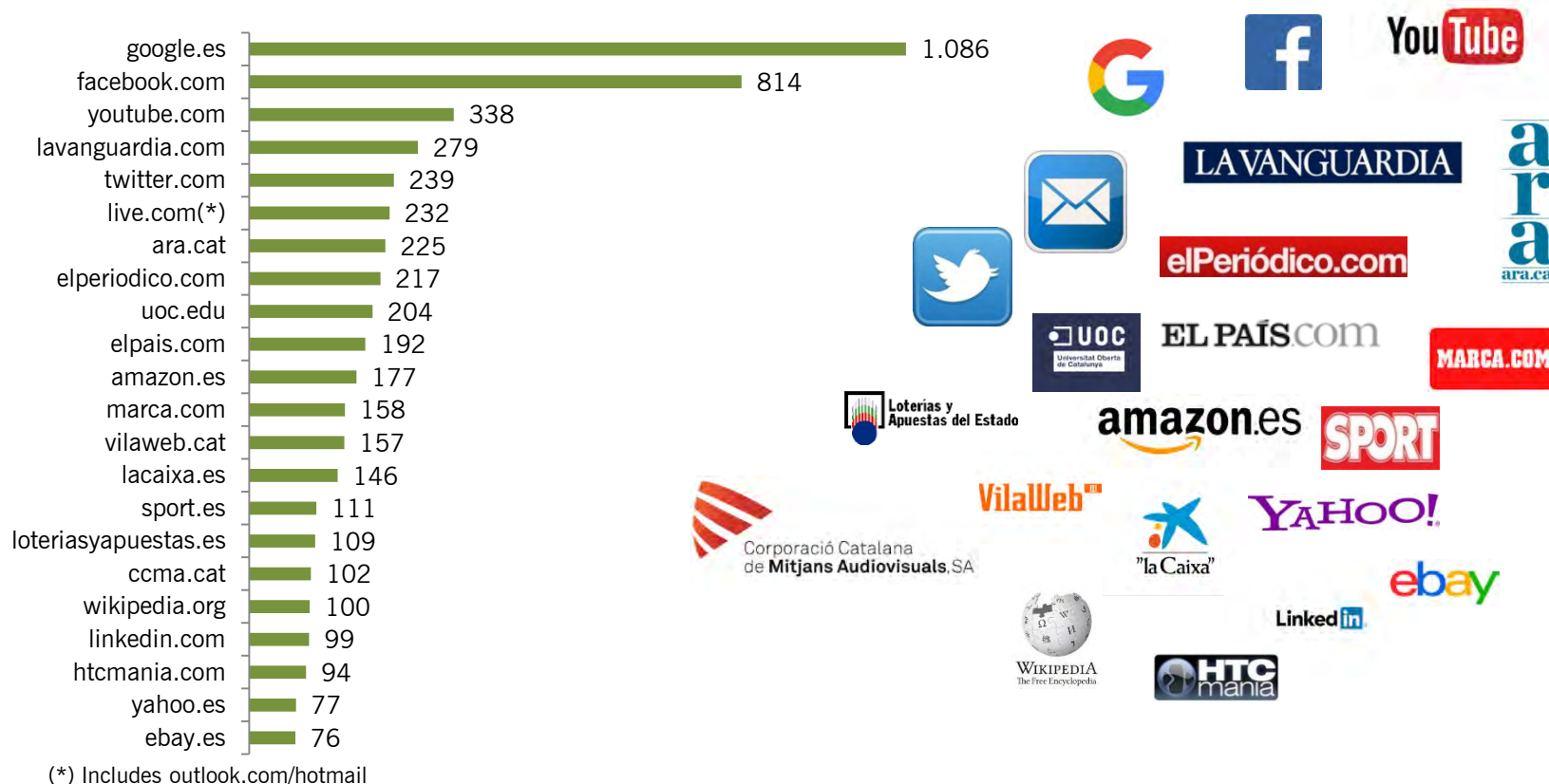
Source: AIMC. *18a encuesta Navegantes en la red*. 17,928 online interviews with volunteer internet users throughout Spain. Data for Catalonia provided by AIMC: 2,617 participants, of which 1,889 are male and 721 female (7 gender not identified). Between October and December 2015.

Consumption of online audiovisual content (3)

The most visited website among Catalan internet users is the Google search engine. This is followed by social media, online newspapers and email.

Most visited sites

(in thousands) Question: Try to remember the last five websites most visited



Source: AIMC. *18a encuesta Navegantes en la red*. 17,928 online interviews with volunteer internet users throughout Spain. Data for Catalonia provided by AIMC: 2,617 participants, of which 1,889 are male and 721 female (7 gender not identified). Between October and December 2015.



Note: OTT media services

OTT media services (1)



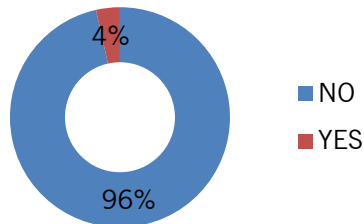
The European Commission defines OTT or Over-The-Top media services as those which provide audiovisual content online without being internet service providers or network operators or telecom services.



For the CNMC, OTT services are those offered via the internet without any control or specific handling by network operators, unlike IP services (according to the CNMC, including services provided by xDSL or NGA networks or new generation accesses) which are provided by electronic communications operators.

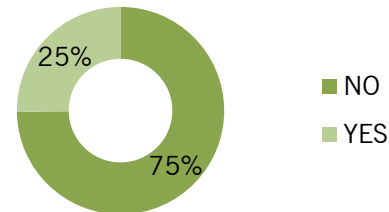
Subscription to video streaming in the home

(baseline: households)



Use of OTT video streaming via the internet

(baseline: Internet users aged 15 and older)



Subscription to audiovisual media services on demand is a growing market in the European Union, although it has yet to develop in Spain. According to data from the CNMC-ONTSI panel of households, only 3.5% of households pay to access video streaming services and, out of all the homes with pay TV, only 2.5% also pay for an OTT service.

Source: [European Commission](#); Comisión Nacional de los Mercados y la Competencia. [Caracterización de algunos servicios over the top en España \(Comunicaciones electrónicas y servicios audiovisuales\)](#); ONTSI. [Las TIC en los hogares españoles. Estudio de demanda y uso de servicios de telecomunicaciones y sociedad de la información](#). July-September 2015.

OTT media services (2)

Netflix, Wuaki.tv, Filmin and TotalChannel are some of the pure OTT players available via subscription in Spain.

Their content focuses on fiction, essentially films and series but also documentaries and live broadcasts of specialty TV channels.

Access is multi-device with an internet connection and by previously downloading the app; they are also installed in factory in some devices, such as Blu-ray players, smart TVs, Chromecast type devices and Apple TV.



Google and Apple also sell and/or hire out films.



Filmin and Wuaki content includes productions in Catalan. Netflix has recently added some programmes dubbed into Catalan to its range.



2015
Films, series,
documentaries



2008
Mostly
independent films



2012
Spanish and Latin
American
independent films



2007
Spanish films and
series



2007
Films



2010
Films and series



2012
Films, series,
sport, live
broadcasting of
specialty channels



OTT media services (3)

Providers of audiovisual media services at the level of Catalonia, Spain and locally via DTT broadcasting distribute most of their content **live** and **a la carte** (with or without time limits) on the internet via corporate websites and also via apps for mobile devices with an internet connection.



Local live and *a la carte* programming



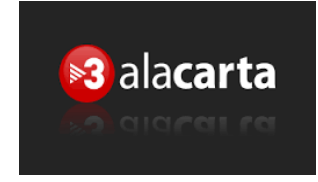
Live and *a la carte* programming; films, TV films, series broadcast, shorts exclusive content such as flooxer and internet series



Live and *a la carte* programming; TV films and series broadcast



Live and *a la carte* programming; films, TV films and series broadcast



Live and *a la carte* programming; series broadcast



Telecommunications operators providing telephone, data and audiovisual services also sell OTT services with catalogues made up fundamentally of fiction, series and films, and offering multi-device access.

They also include content from services provided by OTT players: since 2015, Vodafone with Netflix and Orange TV with Wuaki.



Newsflashes

Newsflashes



Is gender-based violence news?

In January the Catalan Audiovisual Council, Catalan Institute for Women and the College of Journalists of Catalonia held seminars on how news handles violence against women, calling for journalists to play an active role in helping to eradicate this problem in society.



CSA: updating the regulations regarding audiovisual production in France

As a conclusion to the study [*La diversité des producteurs sollicités par les groupes historiques de services de télévision*](#), the French CSA announced it was reviewing key issues of audiovisual policy in France (the definition and provision of independent production, exporting programmes, structure of the sector, relationship between producers and editors of services, etc.). Based on this, the CSA launched a public consultation entitled [*Concertation sur la production audiovisuelle*](#). On 27 January 2016 the French regulator proposed making regulations more flexible and finding a [*“third way”*](#) to overcome the obstacle of the dichotomy created by current regulations between “independent production” and “non-independent production”.



France: shifting from local DTT to HD

On 3 February 2016 the French CSA held a [*call for applications*](#) for local DTT broadcasters to migrate to high definition (HD). As a result of this call, the [*CSA's communication*](#) announced an agreement via which 23 local channels have started broadcasting in HD as from 5 April 2016; three channels on 1 October, and one channel on 1 January 2017.



New Mobile World Congress

Barcelona hosted the MWC 2016, with 101,000 people attending. Particularly of note was the official presentation of the future of 5G technology, a tool that will help to optimise the radio spectrum. In addition, Facebook and Samsung, two leading companies in the world of technology, believe that the future lies in virtual reality. Other notable innovations were 360° video and 3D glasses.



WhatsApp totals one billion users worldwide

WhatsApp achieved this resounding number of clients in February. Facebook bought the instant messaging service two years ago and it has been estimated that, every day, an average of 42 billion messages circulate between its users.

Newsflashes

The European Commission publishes the *Digital Economy & Society Index (DESI) 2016*

On 25 February 2016, the European Commission published the latest sweep of the [Digital Economy and Society Index \(DESI\)](#), an index that summarises relevant indicators on Europe's digital performance and tracks the evolution of EU member states in digital competitiveness. Among these indicators are broadband connectivity, human capital, internet use, integration of digital technology and digital public services.

Formula 1 stays on TV3

Televisió de Catalunya and Movistar+, holder of the broadcasting rights to Formula 1 in Spain, have reached an agreement for the Catalan channel to offer live coverage of the Spanish GP–Circuit de Barcelona free of charge, as well as a summary of the rest of the races held in 2016.

#NetflixInCatalan

Netflix, the streaming TV platform with 75 million subscribers in the world, has added Catalan to the programmes it offers. In some cases the dubbing and subtitling for films and series is subsidised by the Catalan government's Department of Culture.

New news on Ràdio Tele Taxi

Ràdio Tele Taxi will link, via connections on the hour, with Catalunya Informació to offer news bulletins, via an agreement reached between the two radio broadcasters in March.

La Sociedad de la Información en España 2015

 In its annual report Telefónica has highlighted, in 2015, the deployment of fibre optic and the renting of packaged services including broadband via mobile, landline and television. This situation has resulted in what Telefónica defines as the evolution of mass TV towards customised TV.

Analysis of media production

 The Clúster Audiovisual de Catalonia has presented a report containing data on the sector's capacity to generate wealth, the number of companies it contains and the jobs it has created in Catalonia. It also provides information on advertising spend, public aid, box office takings and imports and exports.

Newsflashes

Ofcom publishes a report on access services in 2015

On 7 April 2016 the British regulator published the [Television Access Services Report for 2015](#) with information on the access services (subtitles, sign language and audio description) that must be provided by licensed media suppliers. Last year all the channels broadcasting in the United Kingdom met or even surpassed their imposed quotas. However, 2015 was the second year when non-domestic providers with an Ofcom licence were also required to comply with access regulations. In this area, only one channel (Travel Channel, which broadcasts in Poland) did not comply with the regulations.

Changes in the governance structure of CCMA

 In January Saül Gordillo was appointed Director of the Catalunya Ràdio broadcasters' group, and of digital media in May. In February Jaume Peral became Director of TV3, replacing Eugeni Sallent, who stepped down in December. At the beginning of April Brauli Duart announced that he was temporarily giving up his position as President and that the Vice-President, Núria Llorach, would act in his place.

Debate on the laws of CAC and CCMA

The Catalan parliament has admitted the Bill to modify legislation on Catalonia's audiovisual communication. Among other issues, it proposes that members of CCMA and CAC should be chosen with the support of two thirds of the chamber.

The television habits of minors

 The Asociación de Usuarios de la Comunicación (AUC) has published a study entitled *Menores y televisión. Panorámica de la audiencia en 2015* [*Minors and television. Audience overview in 2015*]. Based on a sample of viewers aged between 4 and 18, it states that minors consume 133 minutes of TV per day (125 in Catalonia) concentrated mostly after the watershed, between 10 pm and midnight.

The CAC starts a campaign to promote the protection of minors on the internet

 The aim is to provide users with tools and resources to increase protection, especially of children and teenagers, from harmful content on the internet. Since April a new section of the website contains a document with recommendations aimed at families, short videos with tips for minors, a series of parental control filters and a more user-friendly procedure to file complaints.

BIAC No. 4 – First 4 months of 2016

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 1st sweep of 2016. Period February and March 2016. Details: Area of Catalonia. Sample from the 1st sweep : 11,499 interviews with individuals aged 14 and upwards (2,380 multimedia interviews, 5,421 single medium - radio, 1,310 single medium - press and 2,388 single medium - magazines).
- AIMC: *18a encuesta Navegantes en la red*. 17,928 online interviews with volunteer internet users throughout Spain. Data for Catalonia provided by AIMC: 2,617 participants, of which 1,889 are male and 721 female (7 gender not identified). Fieldwork carried out between October and December 2015.

Bibliographic citation:

CATALAN AUDIOVISUAL COUNCIL. *Butlletí d'informació sobre l'audiovisual a Catalunya* [Newsletter on the Media Sector in Catalonia] (BIAC) No. 4. First 4 months of 2016. Barcelona: CAC, May 2016. <www.cac.cat>