

Critical Books Review

The Barometer: the statistical basis of communication policies in Catalonia

GENERALITAT DE CATALUNYA. *El Baròmetre i les necessitats estadístiques del sector de la comunicació*. 1st ed. Barcelona: Generalitat de Catalunya, Departament de la Presidència, Col·lecció Lexikon, 2007. ISBN 978-84-393-7510-4

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This valuable study has been created with a desire to increase our insight into the communication sector in our country, in order to design and apply policies to promote this economic activity. The book starts with an introduction by Albert Sáez, Media secretary of the government until January 2008: "Catalan-speaking territories go to make up a very rich communicative and cultural market with an extensive, diverse supply rooted in the territory and in constant growth. However, in spite of this fertility and complexity, our market has never had an instrument to measure and analyse its audiences and to know in depth the consumption practices and habits of the different publics that go to make it up. For decades, the media sector and the cultural industry in Catalonia have had to make do with instruments such as the EGM (General Media Study) or the OJD (Dissemination Justification Office) that, by observing the market for the whole of Spain, disregard more localised but not necessarily less powerful markets."

The lack of reliable and regular data, however, is a widespread evil in this economic activity and not just in Catalonia. Referring to a broader sector, the cultural sector, Lluís Bonet explains the difficulties in finding statistically reliable data:

"The statistical information available on the cultural sector is scarce, with limited temporal series, little homoge-

neity country to country and with a very low capacity for adjusting to the new information-related needs of the contemporary world. Generating statistics is expensive, requires rigour and continuity over time. Governments and their institutions with responsibility or funds to carry this out (statistical institutes, central banks, ministries) tend to concentrate on large-scale economic and social data or on those indicators required by intergovernmental institutions. In general, culture does not form part of this." (Bonet 2004)

On the other hand, Bonet warns that it's not easy to get information that has a certain confidential content (turnover, market position, etc.). If this information does exist, he notes, it is jealously guarded by those in charge of the businesses, guilds or unions that commissioned it. It is only made public, and then partially, when it is used for advertising or to pressurise public opinion and governing bodies. And, if this weren't enough, the degree of interdependence, of internationalisation and of complexity of cultural markets, as well as the number of agents and disperse interests, make it almost impossible to discover the structure and dynamics of each of the cultural sectors in a region or country.

Whatever the case, the lack of statistical data for Catalonia conditions the viability of many media in our communicative area: the surveys currently carried out at a state level provide an insufficient (and perhaps distorted) view of the Catalan and local sphere. And this partiality affects, and to a great extent, the advertising spend of the media in the Catalan language.

In order to fill this gap, the Presidency Department of the Generalitat de Catalunya has published this methodological-style book. The publication comprises two parts. The first, entitled "Barometer of media consumption in Catalan-speaking territories", has been produced by sociologist Sal-

vador Cardús, together with Isaac González, Bernat Albaigés and David Moreno. The second ("The statistical needs of the communication sector in Catalonia") is the result of a commission for the Institute of Communication (InCom-UAB), written by Carles Llorens i Maluquer.

The objective is for the Catalan cultural area (which is also a communicative market) to overcome the traditional connection between instruments for analysing the market and state administrative structures. First, however, it is necessary to put the strategy into context and define the concepts: "What is communication? What are cultural industries? What is audiovisual? Does advertising form part of the media? Books? The Internet? Video games? Mobile phones, text messages, MMS?", wonders Llorens at the start of the document.

The first of the two reports in the book result from a commission by the ESCACC Foundation to establish the specific characteristics of the Barometer of communication and culture. The Barometer, an instrument for observing and analysing the Catalan cultural market, will use a survey methodology in Catalan-speaking territories. This is a reference market with 13 million consumers, in which the audience and cultural consumption will be analysed of a total of 1,500 media (newspapers, supplements, magazines, radio, television, outdoor media). The number of personal interviews per year will increase up to 39,154 and reliable data will be able to be extracted up to the level of "comarca" (approximately county). The Barometer will have three devices: a central survey (annual in frequency, divided into three four-monthly waves), a secondary survey and a children's questionnaire. The frequency of these last two devices is not clear, as in some places it is stated that the secondary survey will be biannual (pg. 48) and, in others, biennial (pg. 51). The same thing occurs with the children's questionnaire, which is said to be triennial on pages 47 and 51, but triannual on page 75. Whatever the case, the Barometer is expected to provide regular data as from 2008.

In the words of Salvador Cardús and his team, "language is to culture and communication what money is to the market: the instrument for ordering *sine qua non*." In this way, one of the most significant contributions of the Barometer will be the sociolinguistic profile of the interviewee. In a territory where two languages co-exist (we would add the

adjective *majority*), language becomes an absolutely core element in understanding the dynamics of consumption. "In language practices there is a mix of habits, traditions, market alternatives, resistances and language aversions... In short, a number of logics of a different order that end up biasing the more or less solid presence of some language customs."

But in order to achieve the objectives established, the economic viability of the Barometer must be assured and it is therefore good news that 380 media already take part in the project, among these the Flaix Group, CCMA (formerly CCRTV), the Catalan County Press Association (ACPC), the Catalan Free Press Association (ACPG) and the Association of Periodical Publications in Catalan (APPEC). In this way, significant deficits can be overcome in the independence and methodological neutrality of currently existing surveys. In the words of the report, these gaps are due "largely to the methodological control exercised by the large media and advertising agencies and planners on these [statistical] instruments, incorporating changes in rules and methodological changes in order to positively influence the figures (for example, control of collective subscriptions in the case of the press)."

For this reason, and with the intention of the Barometer being as transparent as possible, we miss the publication of the different questionnaires and the budget for the project, removed from the original text by the editor. The reason given for this cut is because of their "technical character and ephemeral nature". We disagree with this opinion, given the eminently technical nature of the book analysed here.

In the second report in the book, Carles Llorens aims to discern the statistical needs of the communication sector in Catalonia. After diving into the data available on Catalonia, Spain, the European Union and other countries of interest, such as the United States and Finland, it provides a detailed list of official and private sources.

With regard to Europe, one might think that political and economic integration should involve the unification and modernisation of statistical models among all states in the region. But this is not the case. The only pan-European source for statistics, Eurostat, does not gather data and depends on information provided by the member states. The majority of these countries do not have a sufficient system to control the cultural and communication sector and

do not gather exhaustive data. Moreover, they use different statistical systems, which leads to a lack of harmonisation of data in this field.¹ On the other hand, the statistical models employed are not adapted to the cultural and communication sector. There are important sub-sectors shared out between different categories, or lost in categories that are too general for their significance to be analysed. Consequently, Europe knows the quantity of resources invested in science and innovation, but is incapable of calculating the economic value of culture and communication. (KEA 2007).

But added to the problems of statistical harmonisation are those of updating. The UNSD (United Nations Statistics Division) is the body that looks after the so-called international family of economic and social classifications, which serves as an international reference. This is a series of statistical classifications that have been approved according to the unified system established by the United Nations. With regard to data on products (goods and services), the UNSD has, among other reference classifications, the Central Product Classification (CPC). The so-called Provisional CPC (approved in 1989) has the added value of being the one used by the WTO to define and quantify the international trade of audiovisual goods and services (GATS, point 2, section D). It has numerous problems and is clearly obsolete (among other things, it does not include digital convergence) but at least it has the advantage of having been accepted by the United Nations and incorporated into the agreements of the WTO. For this reason, the function of the Provisional CPC is not only descriptive but also prescriptive.

Nonetheless, in 1999 the UNSD set up a special plan to revise and update these classifications. After the communication sector went through technological and commercial convergence (and even, in some cases, regulatory convergence), it was decided that statistical convergence was urgently required. Digitalisation meant that, on the one hand, the multimedia distribution of all kinds of digital content was possible and, on the other, the creation of new transmission systems. For example, radio and television programmes or feature films can be distributed by Internet, and this kind of dissemination is multiplied by the spread of broadband

networks. With interactive services, it is no longer possible to make a clear distinction between the kind of distribution channel (radio, TV or cinema). Therefore, there are increasingly more audiovisual services that must be classified in the category of "Other", a circumstance that makes the statistical information collected of less use. (Messerlin, Siwel and Cocq 2003)

At the same time, the World Trade Organisation has also decided it is necessary to introduce changes in sector classification (Torrent and Gómez Bustos 2006). The proposal with more political weight is undoubtedly the one formally proposed by the United States to the secretary of the WTO in December 2000 (WTO 2000). We will not go into this issue here but what is interesting is the comment made by the European Broadcasting Union (EBU, UER in its French initials) concerning this document presented by the United States. Basically, it stated the questions raised by digitalisation: in a multimedia context, how do we define concepts which, to date, had been obvious and closed, such as *television*, *radio* or *cinema*? What distinguishes audiovisual services from other electronic services offered by the Internet? (EBU 2001). As can be seen, these are the same questions as those asked by Carles Llorens at the start of the report.

Consequently, the review and updating of statistical classifications at a world level has stumbled against several fronts: a lack of tradition and strategic interest of a majority of developing countries, as well as a clash between different statistical models or the coordination required from all those involved. We should also add the problem of applying the new classification within contexts such as those of the WTO, in which the signatories have committed themselves to a degree of liberalisation based on a classification that would be annulled.

In short, and as recognised by Llorens himself, "grouping the media is difficult. Therefore, rather than defining the sector, which has too many derivatives, what is needed is to list what must not be lacking in statistical work". And this taxonomy is made up of the following elements:

- Press (free, paid and electronic)
- Radio (production, broadcast and audience)

¹ The main job of Eurostat is precisely to make the data provided by member states comparable.

- Television (production, broadcast and audience)
- Advertising (spend)
- Internet (publication)
- Cinema (production, distribution and exhibition)
- Video games (production and sales)
- Music or phonographic publication (production and sales)
- Books (production and sales)
- Video-DVD (production and sales)

Each of these items should be tackled from different perspectives: audience, consumption, message, technology and economic aspects (including advertising). This is the proposal, sensible and useful, presented by Llorens concerning the statistical needs of the communication sector in Catalonia. The point of departure is solid and must allow a technical and economically viable method and definitions to be laid down. To achieve this, however, both the involvement of the private and public sector is required. Both the main communication groups of the country as well as official bodies that are responsible for statistics or the media must also take part in the project. Only then will we achieve what Cardús and his team call "scientific, political and functional legitimisation".

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