



Butlletí d'informació sobre l'audiovisual a Catalunya

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

SECOND FOUR MONTHS OF 2015

No 2. September 2015

Summary

Media penetration in Catalonia

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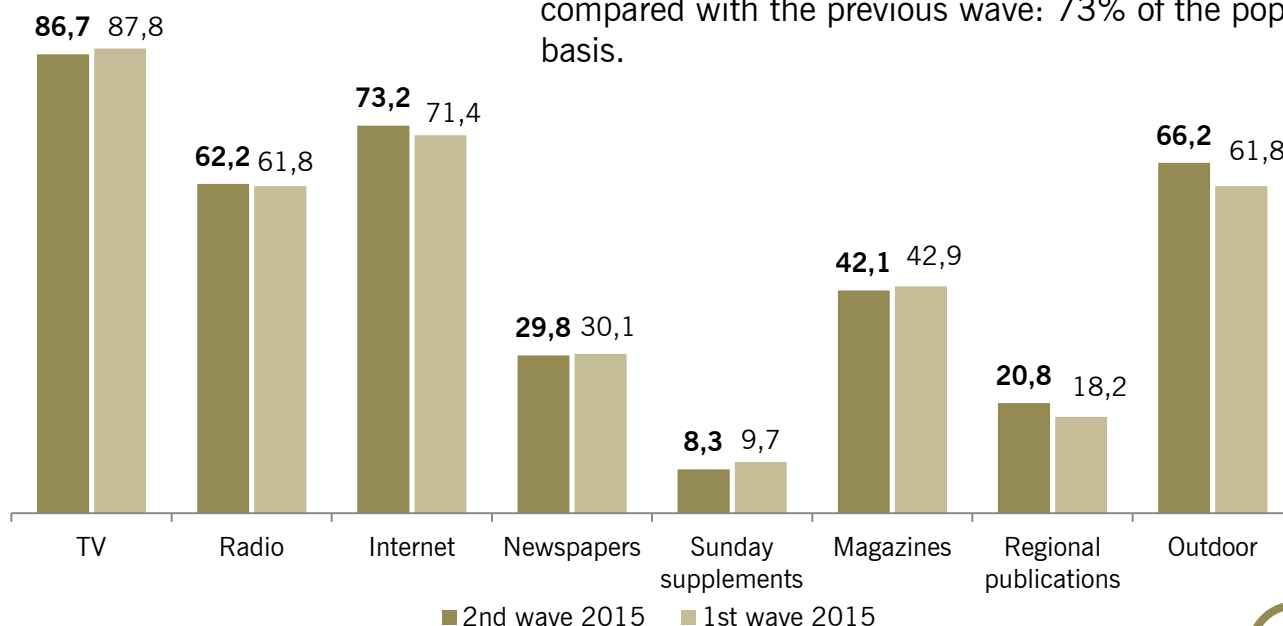
Media penetration in Catalonia

Penetration

(% of total population)

Television is the medium with the highest penetration in Catalonia: almost 87% of Catalans watch TV while more than 62% of the population listens to the radio.

There has been a notable increase in internet use, growing significantly compared with the previous wave: 73% of the population connects on a daily basis.



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 (on paper), radio (Monday-Sunday), television and 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 Baròmetre Catalunya – 2nd wave 2015.

TV consumption falls during the summer, decreasing from an annual average of 4 hours a day to 3 hours and 11 minutes in August, according to data from Kantar Media.



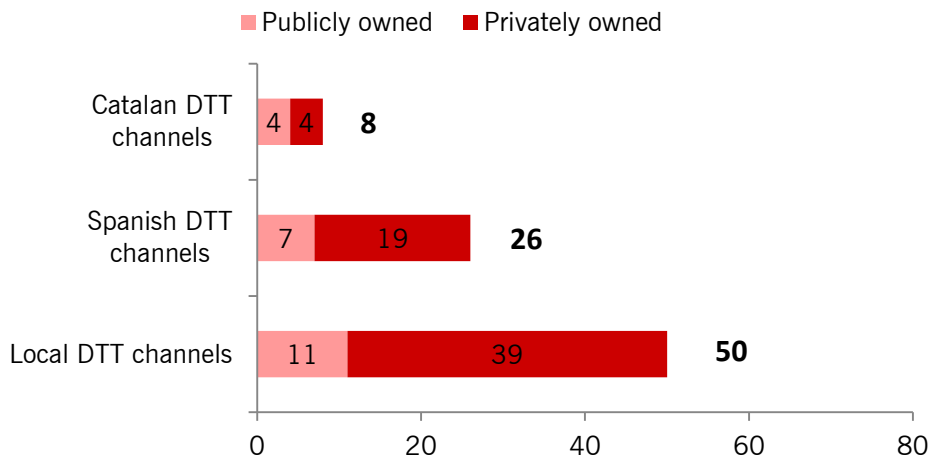
Television

Breakdown of TV channels in Catalonia

By service zone and ownership

(number of DTT channels)

84 TV channels



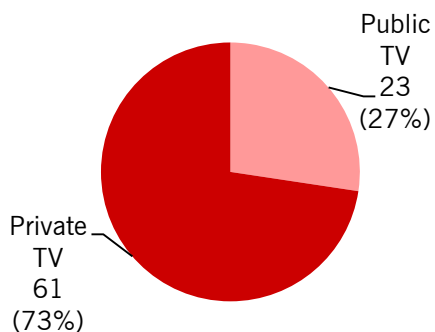
The number of free TV channels available in Catalonia is 84 (three-quarters of the total), broadcast by privately-owned companies.

Catalan households receive an average of 38 free channels:

- 8 at the level of Catalonia
- 26 at the level of Spain, and
- 1-4 at a local level, depending on the province.

By supply

(number and % of DTT channels)



The supply of private TV has fallen compared with the previous 4 months (BIAC no.1). The Catalan channel Boom and three local channels by Tele Taxi TV (serving Sabadell, Granollers and Tarragona) have stopped broadcasting.

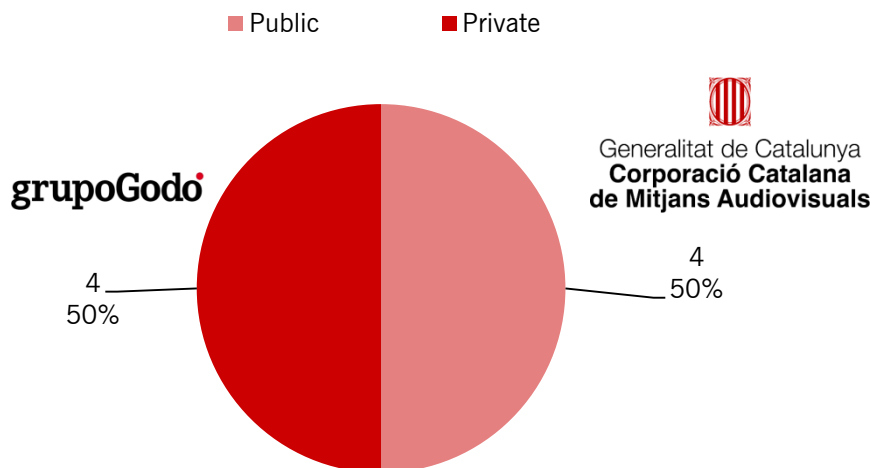
Note: BIAC uses the term *channel* (usual term) to refer to DTT *programmes* (technical and administrative term) broadcast by each multiplex (MUX).

Sources: Catalan Audiovisual Council (Catalan and local DTT channels) and Ministry of Industry, Energy and Tourism (Spanish DTT channels). September 2015

Breakdown of Catalan TV channels

By ownership

(% of Catalan DTT channels in Catalonia)



By supply

PUBLIC CHANNELS	PRIVATE CHANNELS
CCMA	GRUPO GODÓ
TV3	8tv
Super3/33	RAC105
3/24	BARÇA TV
Esport3	
TV3 HD	

8 Catalan channels

There are 8 TV channels on offer at the level of the Autonomous Community of Catalonia, divided evenly into:

- Publicly-owned: Corporació Catalana de Mitjans Audiovisuals (5 channels, one in HD), and
- Privately-owned: Emissions Digitals de Catalunya, company related to Grupo Godó (3 channels).

Catalonia peaked in terms of Catalan channels during the period 2010-2014, with 12 in total (8 public and 4 private). Since the end of 2014, with the reorganisation of the broadcasting spectrum, this supply has been reduced to 8 Catalan channels.

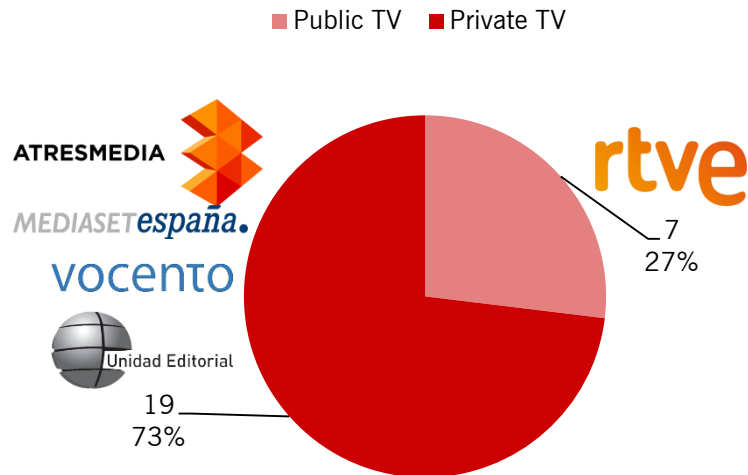
The language used by the Catalan media is Catalan.

Source: Catalan Audiovisual Council and corporate websites of audiovisual service providers and communication groups. September 2015.

Breakdown of Spanish TV channels

By ownership

(% of Spanish DTT channels in Catalonia)



26 Spanish channels

The Spanish channels available in Catalonia total 26, most of which (73%) are privately owned.

Mediaset (with 8 channels) and Atresmedia (with 7) supply more than half (58%) the total Spanish channels in Catalonia. In July 2015, Atresmedia launched a new TV channel, Mega, in the spot previously occupied by the pay channel Gol TV.

In the public sphere, CRTVE supplies 7 free channels, two of these in HD.

The language used by Spanish television is Spanish, except for local sections in Catalan offered by the public body, CRTVE, in Catalonia.

By supply

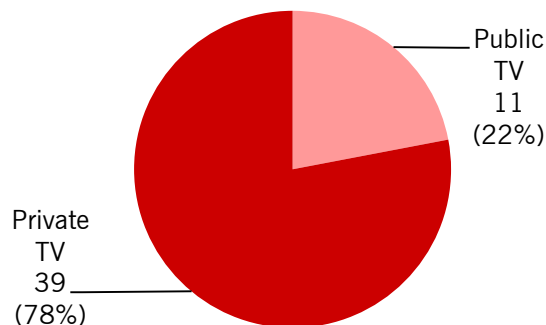
PUBLIC CHANNELS	PRIVATE CHANNELS			
CRTVE	ATRESMEDIA	MEDIASET	VOCENTO (NET TV)	UNIDAD EDITORIAL (VEO TV)
La 1	Antena 3	Telecinco	Disney Channel	Discovery Max
La 2	Antena 3 HD	Telecinco HD	Paramount Channel	13 TV
24H	Neox	Boing		
Clan	Nova	FDF		
La 1 HD	La Sexta	Cuatro		
Teledporte	La Sexta HD	Cuatro HD		
Teledporte HD	Mega	Energy		
		Divinity		

Source: Ministry of Industry, Energy and Tourism and corporate websites of audiovisual communication providers and communication groups. September 2015.

Breakdown of local TV channels

By ownership

(number and % of DTT channels)



50 local channels

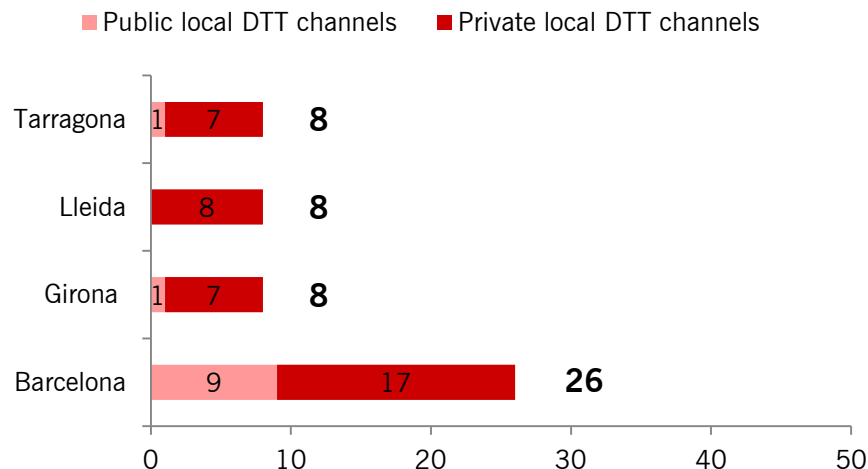
Catalonia has 50 local channels, mostly privately-owned (39), and more than half are located in the province of Barcelona (26).

The peak in local TV available in Catalonia (64 channels) occurred in 2010, the year of the digital switchover. A total of 14 channels (7 public and 7 private) have stopped broadcasting over the last 5 years.

The language used on local TV channels is Catalan.

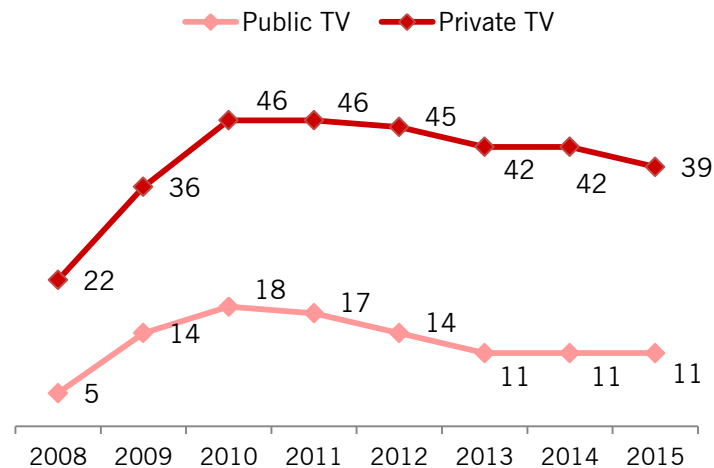
By ownership and province

(number of DTT channels)



Trend in local TV channels. Period 2008-2015

(number and ownership of DTT channels)

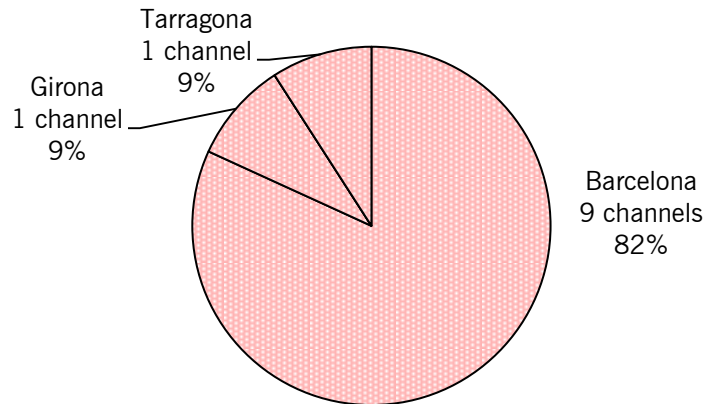


Source: Catalan Audiovisual Council. September 2015

Public local television

By province

(number of local DTT channels)



There has been a stable supply of publicly-owned local TV since 2013: 11 channels.

Most of the channels are geographically concentrated in the most densely populated zones in Catalonia, such as the province of Barcelona.

By supply

BARCELONA	GIRONA	TARRAGONA
Barcelona Televisió	Canal 10 Empordà	TAC 12
Televisió de L'Hospitalet		TV El Vendrell
Televisió de Badalona		
Maresme 1 TV		
Vallès Oriental TV		
Canal Terrassa Vallès		
Vallès Visió		
Penedès Televisió		
Canal Blau		

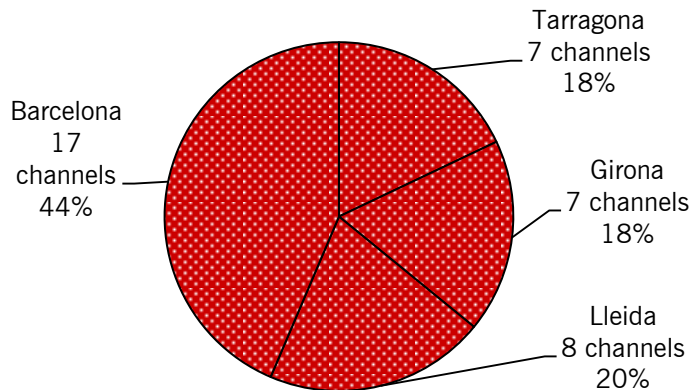
**11 public
local
channels**



Source: Catalan Audiovisual Council. September 2015.

Private local television (1)

By province (as per ownership)
(number of local DTT channels)



There are 39 private local TV channels.

Changes occurring:

- Tele Taxi TV Cornellà and Tele Taxi TV Tarragona have stopped broadcasting.
- The government has assigned the place previously occupied by Tele Taxi TV Sabadell to the provider Diari de Girona, SA. This provider is not broadcasting.

Private local TV is distributed within all four provinces, especially Barcelona province.

By supply

BARCELONA	LLEIDA	GIRONA	TARRAGONA
Televisió del Berguedà	Pirineus TV	Televisió del Ripollès	Canal 21 Ebre
25TV	Tot TV	Televisió Costa Brava	Canal Reus TV
ETV Llobregat Televisió	Tot TV	Banyoles Televisió	El Punt Avui TV (Tarragona)
Maresme TV	Lleida TV	Empordà Televisió	Canal TE
TVSC Vallès 1	Lleida TV	Olot Televisió	L'Ebre TV
Canal Taronja Osona	Lleida TV	Televisió de Girona	Mola TV (Tarragona)
Canal Taronja Bages	El Punt Avui TV (Lleida)	El Punt Avui TV (Blanes)	
Canal Taronja Osona	Unnamed (La Seu d'Urgell)		
El Punt Avui TV (Barcelona)			
El Punt Avui TV (Sabadell)			
El Punt Avui TV (Vic)			
Mola TV (Vilanova i la Geltrú)			
Mola TV (Vallès Occidental)			
El 9 TV			
TV 20			
El Punt Avui TV (Granollers)			
Unnamed (Igualada)			

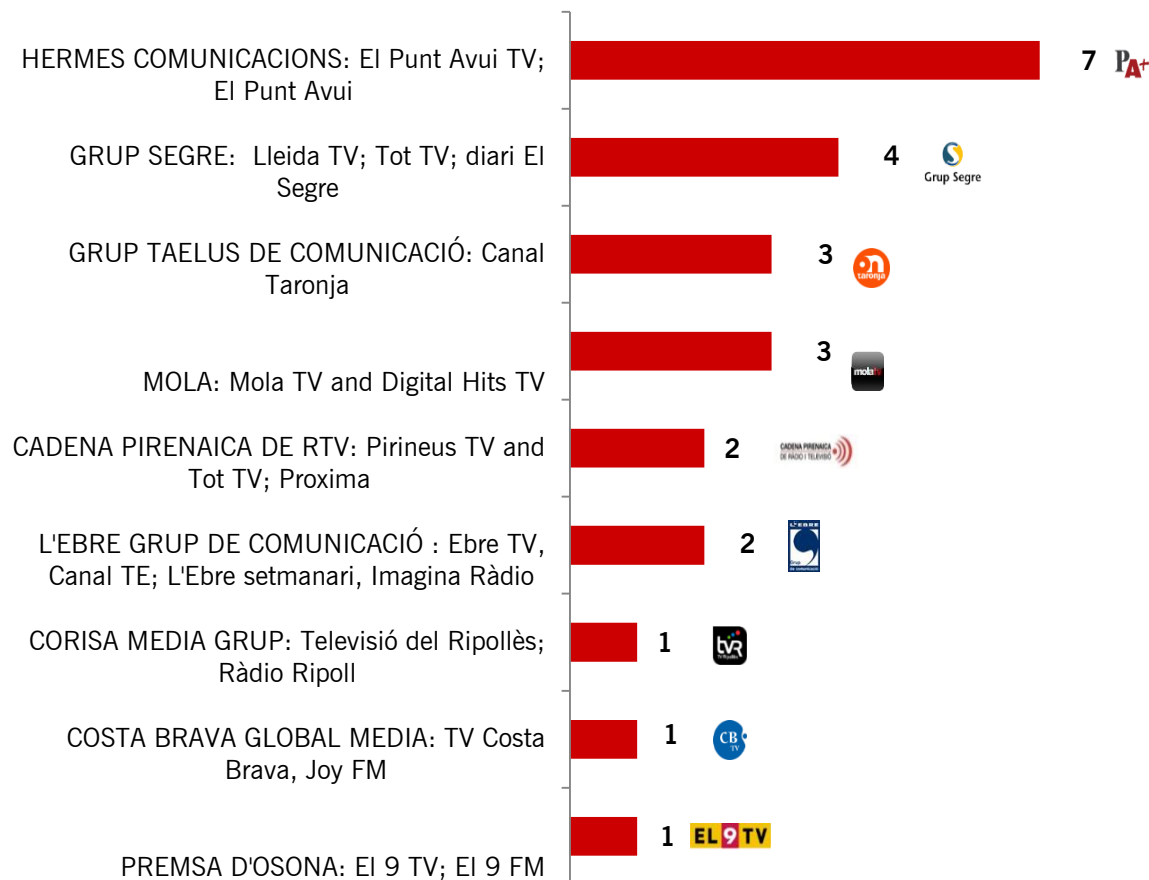
**39 private
local
channels**



Source: Catalan Audiovisual Council. September 2015.

Private local television (2)

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



Of the 39 private local TV channels, 24 belong to a supra-municipal or municipal communication group.

Compared with the previous four-month period (BIAC no. 1), it should be noted that Tele Taxi TV has disappeared, although it is still present on the radio.

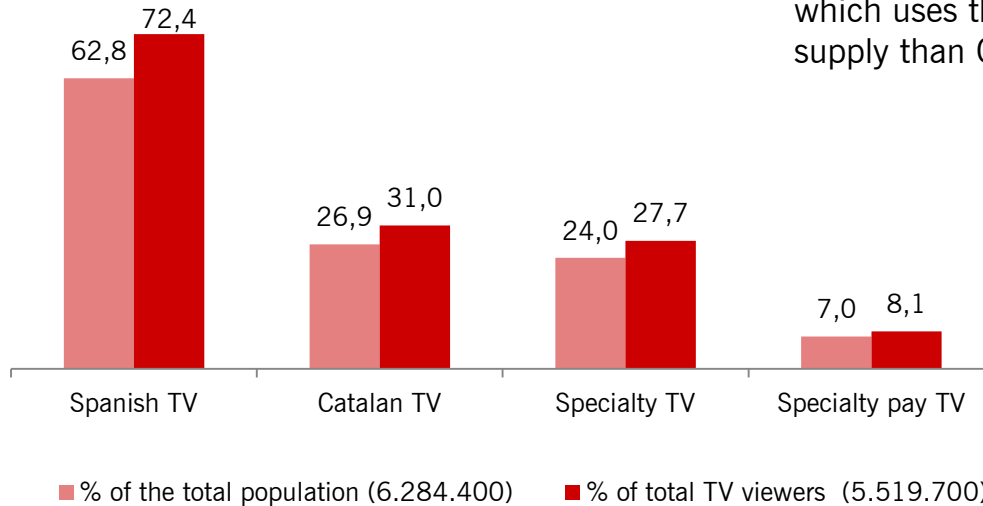
The groups Hermes Comunicacions and Segre top the list in terms of the number of local TV licences, with 7 and 4 channels respectively.

Source: Catalan Audiovisual Council and corporate websites of audiovisual service providers and communication groups. September 2015.

Penetration and language of television

Penetration

(%, day prior to interview)



Most of the television watched in Catalonia is Spanish TV, which uses the Spanish language. It has a much larger supply than Catalan TV and therefore a larger audience.

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, Boing, etc.).

Breakdown by consumption language out of total TV viewers

(%, day prior to interview)



The main language for consuming TV in Catalonia is Spanish.

Note: given that a 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 Baròmetre Catalunya – 2nd wave 2015.

Television audiences (1)

Monthly share in Catalonia (% by channel, January-August 2015, in descending order according to August's ranking)

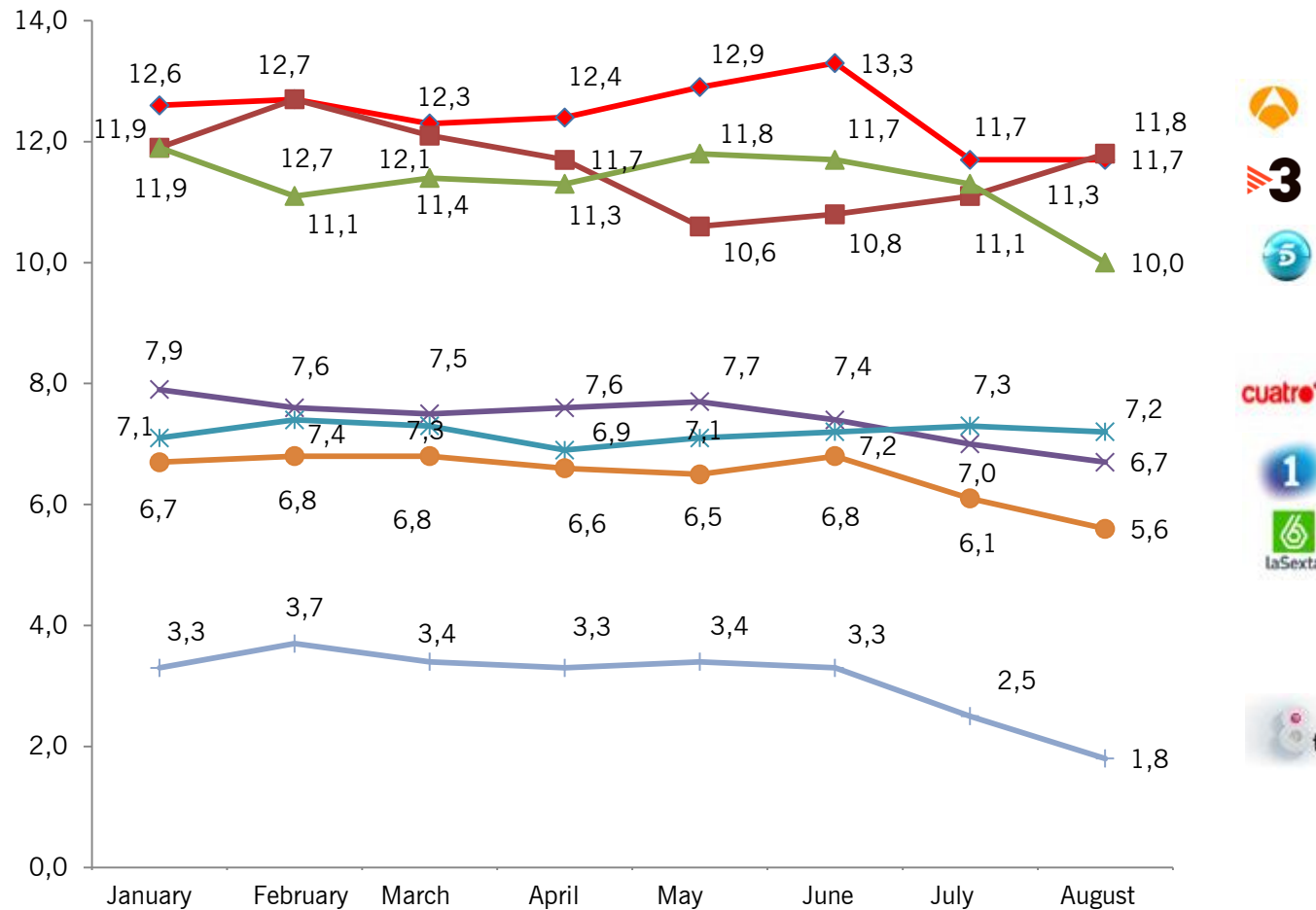
	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
Antena 3 TV	11,9	11,1	11,4	11,3	10,6	10,8	11,1	11,8
TV3	12,6	12,7	12,3	12,4	12,9	13,3	11,7	11,7
Telecinco	11,9	12,7	12,1	11,7	11,8	11,7	11,3	10,0
Cuatro	7,1	7,4	7,3	6,9	7,1	7,2	7,3	7,2
La 1	7,9	7,6	7,5	7,6	7,7	7,4	7,0	6,7
laSexta	6,7	6,8	6,8	6,6	6,5	6,8	6,1	5,6
Factoría de Ficción	3,2	3,0	3,0	3,2	3,3	2,9	3,1	3,8
Neox	2,5	2,8	2,7	2,5	2,6	2,6	2,4	2,9
Mega							2,3	2,9
Divinity	2,8	2,8	2,4	2,9	2,6	2,4	2,3	2,5
La 2	2,7	2,5	2,4	2,3	2,4	2,6	2,5	2,5
Discovery Max	2,1	2,1	2,1	2,3	2,2	2,1	1,9	2,3
Nova	2,4	2,4	2,3	2,3	2,4	2,1	2,1	2,2
Clan	1,3	1,4	1,5	1,7	1,7	1,8	2,2	2,2
Paramount Channel	1,9	1,8	2,0	1,9	1,8	2,0	1,9	2,1
Energy	1,6	1,8	1,8	1,8	1,7	1,8	1,9	2,0
8tv	3,3	3,7	3,4	3,3	3,4	3,3	2,5	1,8
13TV	1,1	1,0	1,3	1,4	1,5	1,4	1,4	1,6
Boing	1,2	1,1	1,1	1,2	1,2	1,3	1,6	1,5
3/24	1,4	1,4	1,5	1,2	1,3	1,4	1,5	1,4
Super3/33	1,6	1,5	1,6	1,5	1,5	1,6	1,4	1,2
Disney Channel	1,3	1,2	1,2	1,1	0,9	1,0	1,3	1,0
Esport3	1,2	1,1	1,3	1,4	1,5	1,1	0,8	0,9
Teledeporte	0,3	0,4	0,4	0,5	0,9	0,7	1,2	0,8
24h	0,6	0,6	0,6	0,6	0,6	0,7	0,8	0,7
RAC105	0,1	0,1	0,1	0,1	0,1	0,1	0,2	0,1

Note: Share is the percentage of individuals in the audience of a channel (for a programme or period of time) in relation to the percentage of individuals watching TV during the same programme or period of time. Mega started broadcasting in July 2015.

Source: CAC, based on data from Kantar Media.

Television audiences (2)

Monthly trend in the share of the main channels in Catalonia
(%, January- August 2015)

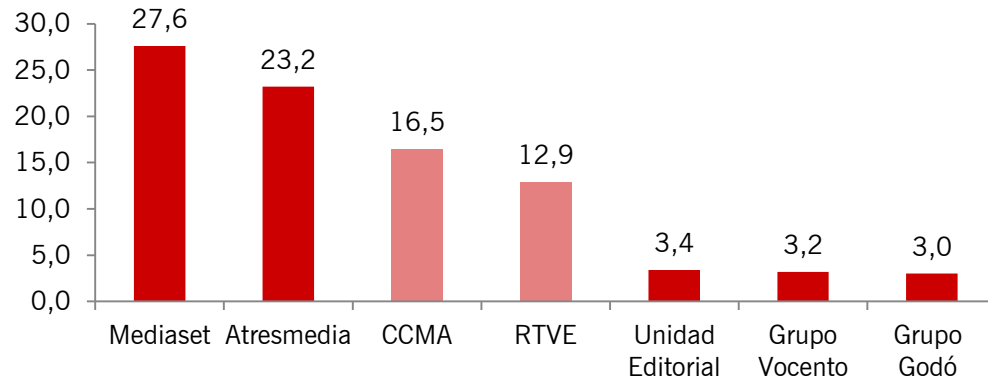


Source: CAC, based on data from Kantar Media.

Television audiences (3)

Share in Catalonia

(% per group, average January-August 2015)

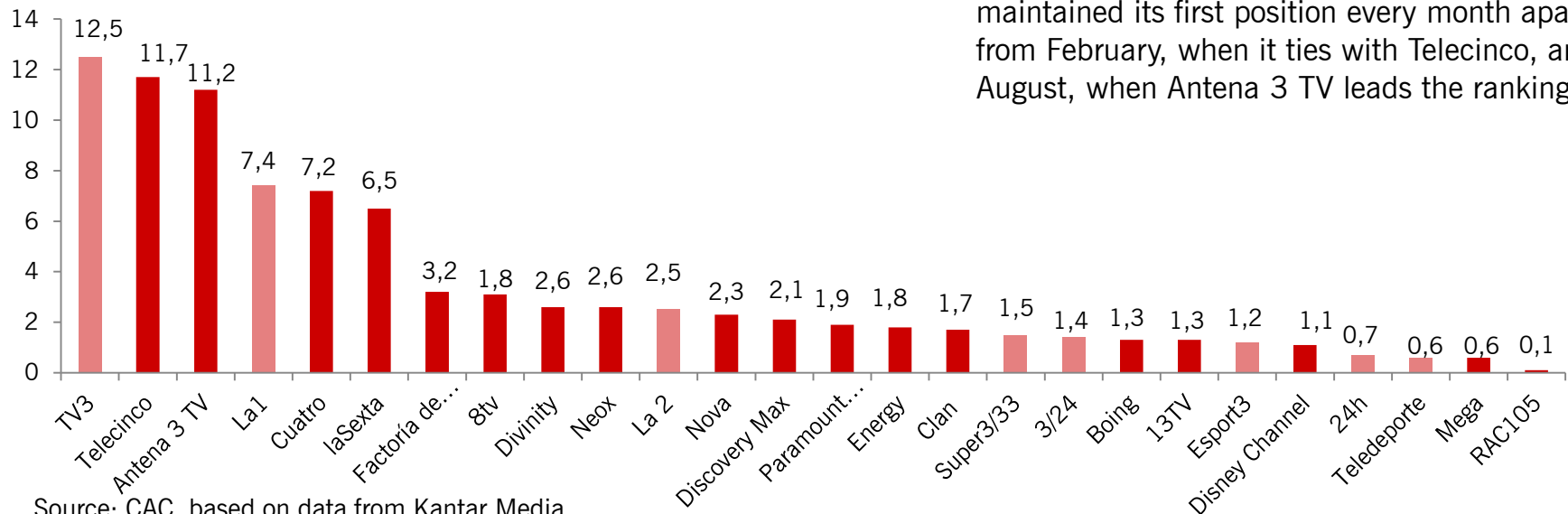


The TV provided by private groups clearly leads the TV audiences. The Catalan public group ranks third behind the two main Spanish groups, Mediaset and Atresmedia.

The groups broadcasting in Catalan – CCMA and Godó – have a 19.5% audience share.

Share in Catalonia

(% per channel, average January-August 2015)



From the start of the year to date, TV3 has maintained its first position every month apart from February, when it ties with Telecinco, and August, when Antena 3 TV leads the ranking.

Source: CAC, based on data from Kantar Media.

Television audiences: highest ratings

Ranking of the programmes with the highest audience ratings in Catalonia

May 2015

Programme	Channel	Date	Audience (ooo)	Share (%)
Lliga de Campions: Bayern Munich-Barça	3	12/05/15	1.571	46,3
Copa del Rei: Ath. Bilbao-Barça	3	30/05/15	1.250	41,5
Eurovisión: votaciones	1	23/05/15	945	41,8
Lliga de Campions: Juventus-R.Madrid	3	05/05/15	833	24,5
Copa del Rey: Ath. Bilbao-Barça	5	30/05/15	809	26,9
E15: els resultats	3	24/05/15	752	24,0
Champions League: Juventus-R.Madrid	1	05/05/15	736	21,7
TN cap de setmana vespre	3	17/05/15	631	24,6
Champions League: Bayern Munich-Barça	1	12/05/15	625	18,4
TN cap de setmana vespre	3	03/05/15	614	21,4

June 2015

Programme	Channel	Date	Audience (ooo)	Share (%)
Lliga de Campions: Juventus-Barça	3	06/06/15	1.506	52,1
Tricampions	3	07/06/15	836	28,1
TN cap de setmana vespre	3	07/06/15	741	27,4
Champions League: Juventus-Barça	1	06/06/15	725	25,1
Entrevista al President de la Generalitat	3	22/06/15	678	22,1
TN vespre	3	24/06/15	638	25,1
TN migdia	3	09/06/15	618	30,9
TN vespre	3	22/06/15	596	24,6
TN migdia	3	16/06/15	591	29,8
TN migdia	3	15/06/15	569	26,1

Note: only the match is considered in the case of football broadcasts, not the programme before or after the game.

July 2015

Programme	Channel	Date	Audience (ooo)	Share (%)
TN migdia	3	02/07/15	580	31,2
TN vespre	3	27/07/15	559	25,6
TN migdia	3	01/07/15	558	28,8
TN vespre	3	20/07/15	555	24,4
TN migdia	3	03/07/15	549	28,0
TN vespre	3	06/07/15	531	22,5
Motociclismo Mundial Moto GP: G.P. Alemanya	5	12/07/15	531	32,7
TN migdia	3	27/07/15	529	26,2
TN migdia	3	20/07/15	525	25,7
TN migdia	3	21/07/15	520	26,9

August 2015

Programme	Channel	Date	Audience (ooo)	Share (%)
Supercopa Barça-Ath. Bilbao	3	17/08/15	1.037	40,2
Supercopa d'Europa Barça-Sevilla	3	11/08/15	797	38,0
Supercopa Ath. Bilbao-Barça	3	14/08/15	787	34,1
Trofeu Joan Gamper Barça-Roma	3	05/08/15	705	31,2
International Champions CUP Fiorentina-Barça	3	02/08/15	572	25,7
TN migdia	3	31/08/15	559	26,8
TN vespre	3	17/08/15	532	26,7
TN cap de setmana vespre	3	30/08/15	530	23,8
TN vespre	3	24/08/15	526	26,7
El Hormiguero 3.0	9	31/08/15	525	17,9

Source: CAC, based on data from Kantar Media.

Channel choice in simultaneous broadcasts

Audiences for programmes broadcast simultaneously by two channels in Catalonia (in thousands of viewers)

Sports event	Date broadcast	Channel	Viewers
Semifinal Champions' League: Bayern-Barça	12/05/2015		1.571.000
			625.000
Formula 1: Grand Prix Monaco	24/05/2015		391.000
			178.000
Final Champions' League: Juventus-Barça	06/06/2015		1.506.000
			725.000
Formula 1: Grand Prix Great Britain	05/07/2015		243.000
			179.000
Formula 1: Grand Prix Hungary	26/07/2015		225.000
			221.000
Joan Gamper Trophy: Barça – Roma	05/08/2015		705.000
			141.000
Final European Supercopa: Barça – Sevilla	12/08/2015		797.000
			347.000
Champions' League: R. Madrid – Shakhtar Donetsk	15/09/2015		483.000
			257.000
Champions' League: Barça – Bayer Leverkusen	29/09/2015		1.055.000
			470.000

When a sports broadcast can be seen at the same time on both TV3 and a Spanish channel, the audience normally prefers the TV3 broadcast.

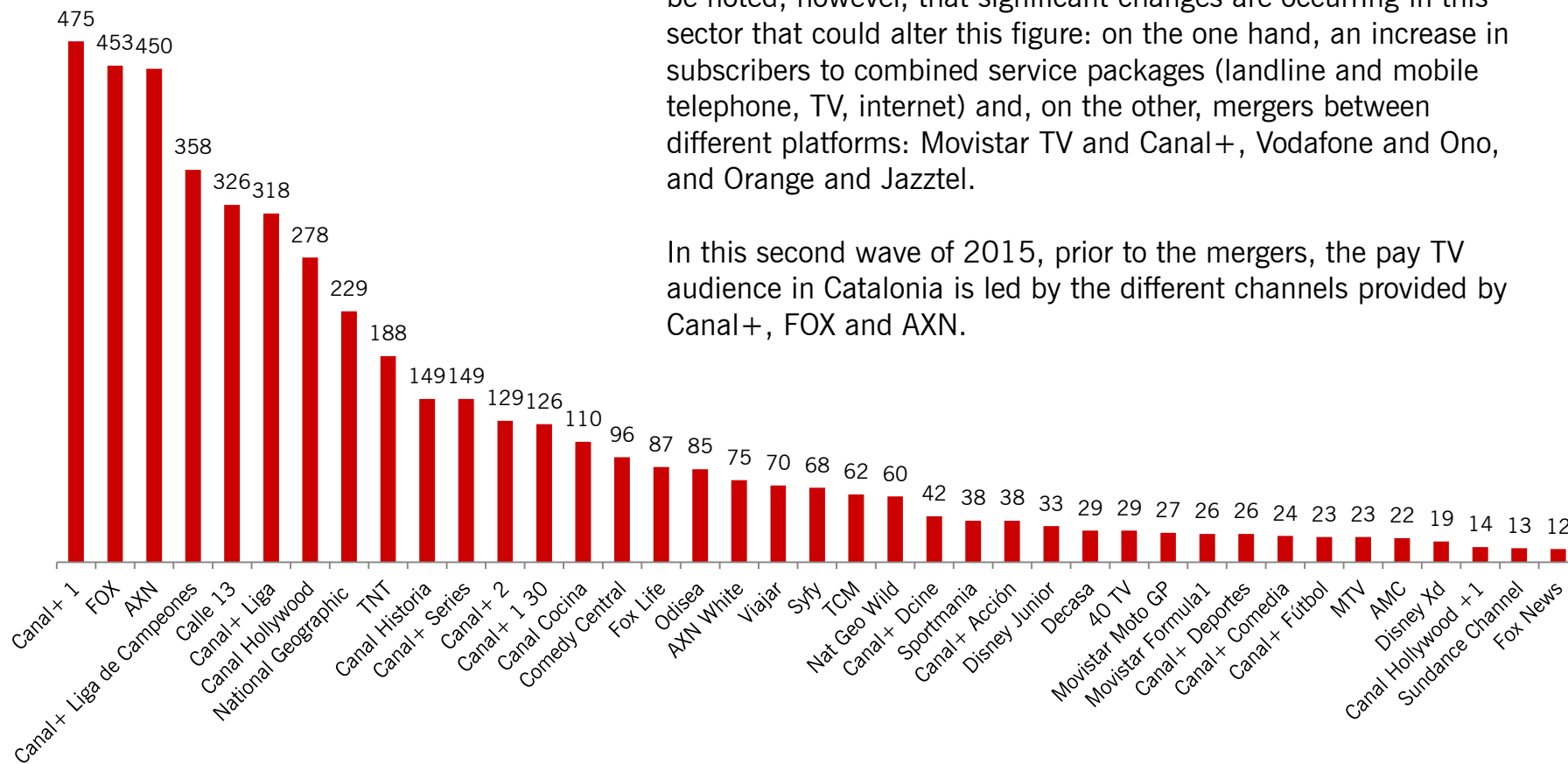
As can be seen, there is only one exception during the period in question.

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)



Pay TV has maintained a share of around 8% in Catalonia. It should be noted, however, that significant changes are occurring in this sector that could alter this figure: on the one hand, an increase in subscribers to combined service packages (landline and mobile telephone, TV, internet) and, on the other, mergers between different platforms: Movistar TV and Canal+, Vodafone and Ono, and Orange and Jazztel.

In this second wave of 2015, prior to the mergers, the pay TV audience in Catalonia is led by the different channels provided by Canal+, FOX and AXN.

Source: EGM Baròmetre Catalunya – 2nd wave 2015.

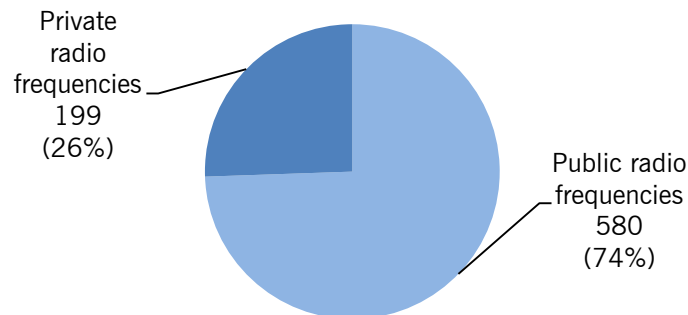


Breakdown of radio broadcasters in Catalonia

779 frequencies divided among 322 radio broadcasters

By ownership

(number and % of FM frequencies)

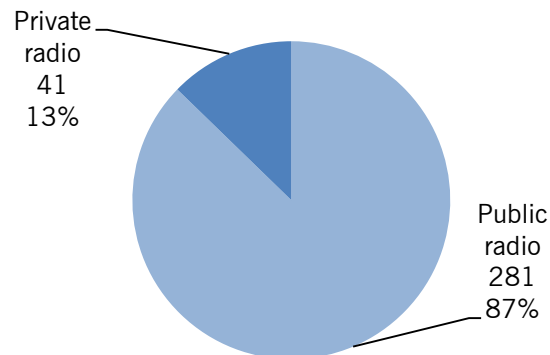


The Catalan radio sector is made up of 779 frequencies (or 323 broadcasters) that are publicly or privately owned, which broadcast their programmes in different service zones: local or municipal, throughout Catalonia or Spain. Publicly-owned radio ranks above commercial radio higher in the Catalan sector:

- Public radio: 580 frequencies or 281 broadcasters.
- Private radio: 199 frequencies or 41 broadcasters.

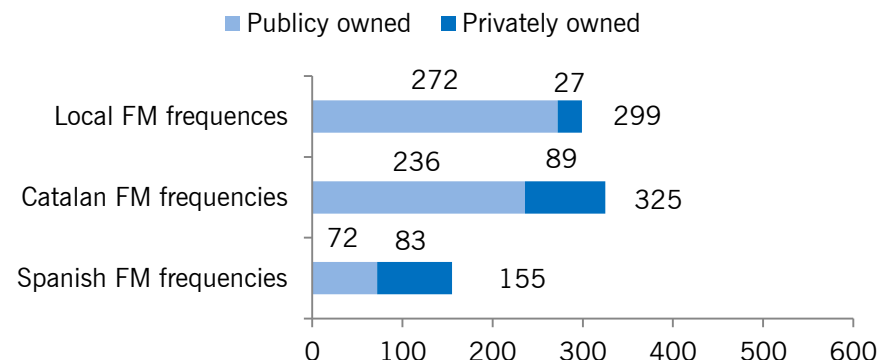
By ownership

(number and % of broadcasters)



By service zone and ownership

(number of FM frequencies)

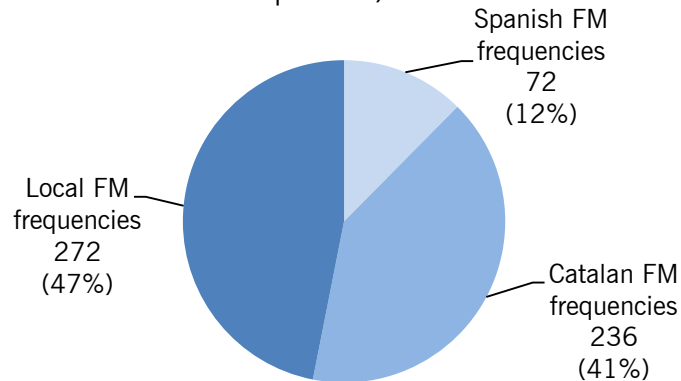


Note: a broadcaster can use more than one FM frequency.

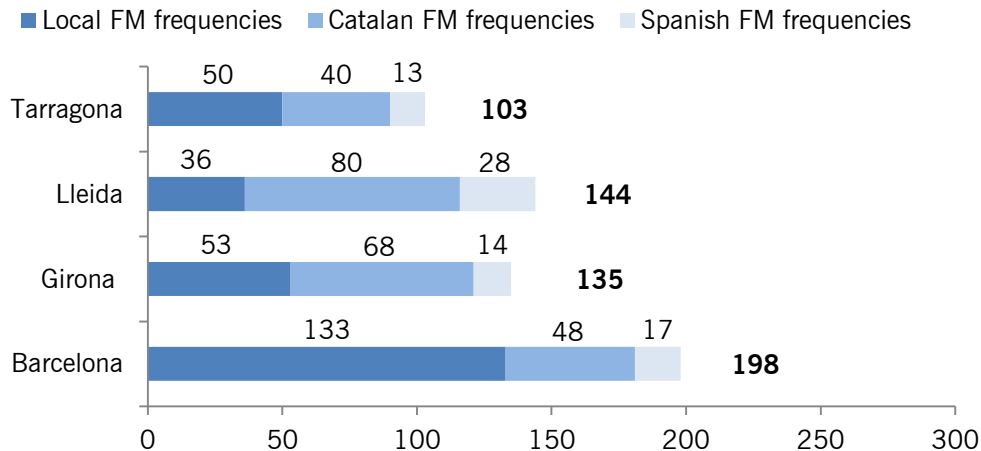
Source: Catalan Audiovisual Council based on data from CCMA (Catalan FM) and the Ministry of Industry, Energy and Tourism (Spanish FM). September 2015

Public radio

By service zone
(number and % of FM frequencies)



By province and service zone
(number and % of FM frequencies)



Source: Catalan Audiovisual Council based on data from CCMA (Catalan FM) and the Ministry of Industry, Energy and Tourism (Spanish FM). September 2015.

580 frequencies distributed among 281 public broadcasters

Radio supply

PUBLIC RADIO BROADCASTERS		
CCMA	RNE	LOCAL BROADCASTERS
Catalunya Ràdio	Radio Nacional	272 broadcasters
Catalunya Informació	Radio Clásica	
Catalunya Cultura	Radio 3	
Catalunya Música	Ràdio 4	
	Radio 5 Todo Noticias	

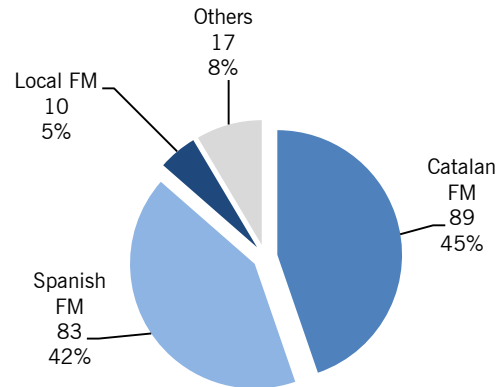
Public radio is mostly made up of local broadcasters (47% of the frequencies). The province of Barcelona has the highest number of FM frequencies.

The language used on public radio is mostly Catalan. RNE broadcasters use Spanish as their main language except for Ràdio 4.

Private radio (1)

By service zone

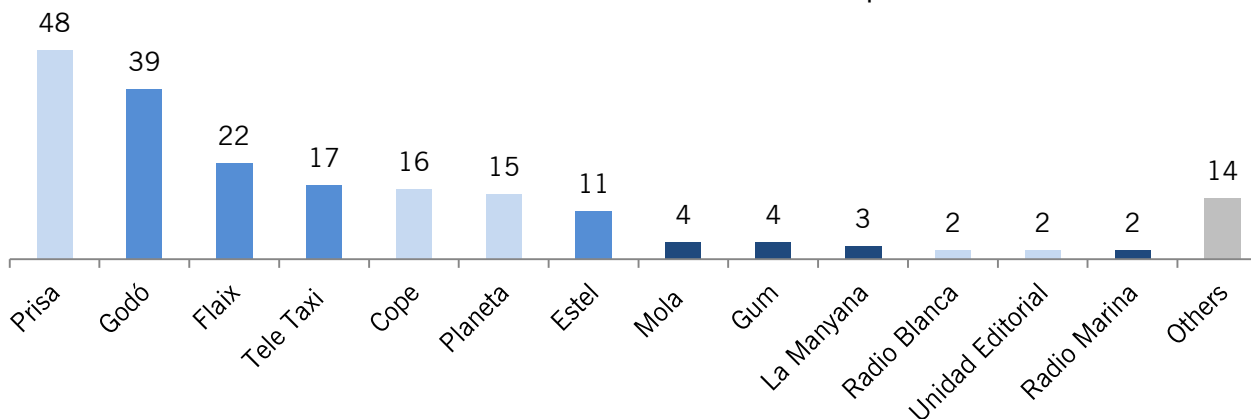
(number of FM frequencies)



199 frequencies distributed among 41 private broadcasters

Catalan radio groups have the largest share of frequencies in Catalonia (45%) although the Spanish group Prisa (Cadena SER, 40 Principales, Cadena Dial, M80, Ona FM, Radiolé) ranks first in terms of the number of frequencies (48). This is followed by Grupo Godó (with the general channel RAC1 and music channel RAC 105) with 39 and Grup Flaix (with music channels Flaix FM and Flaixbac), which broadcasts via 22 frequencies.

Radio groups



Note: the Others column includes local multimedia communication groups with a radio licence and local radio companies (see the next page).

Source: Catalan Audiovisual Council and corporate websites of the providers of audiovisual communication services and media groups. September 2015

Private radio (2)

Private radio supply

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

LOCAL RADIO GROUPS		
Group		Frequencies
MOLA		4
Amb2 FM		2
Digital Hits FM		2
GUM		4
Gum FM		4
LA MANYANA		3
s/d		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		
TLB		1
Styl FM		
SIMALRO		1
Ràdio UA1		
MONTSERRAT RTV		1
Montserrat Ràdio		
TOTAL 13 broadcasters		21

LOCAL RADIO COMPANY		
Broadcaster		Frequencies
Ràdio Olot		1
Ràdio Ripoll		1
Ràdio Vic		1
Ràdio Aran		1
Hit 103		1
Ràdio Adventista		1
TOTAL 6 broadcasters		6

CATALAN RADIO GROUPS		
Group		Frequencies
GODÓ		39
RAC 1		23
RAC 105		16
FLAIX		22
Flaix FM		12
Ràdio Flaixbac		10
TELE TAXI		17
Ràdio Tele Taxi		14
Ràdio RM		3
ESTEL		11
Ràdio Estel		11
TOTAL 7 broadcasters		89

SPANISH RADIO GROUPS		
Group		Frequencies
PRISA		48
SER		19
40 Principales		11
Cadena Dial		7
Ona FM		4
Maxima FM		3
M 80		3
Radiolé		1
COPE		16
COPE		4
Cadena 100		4
Rock FM		3
s/d		5
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

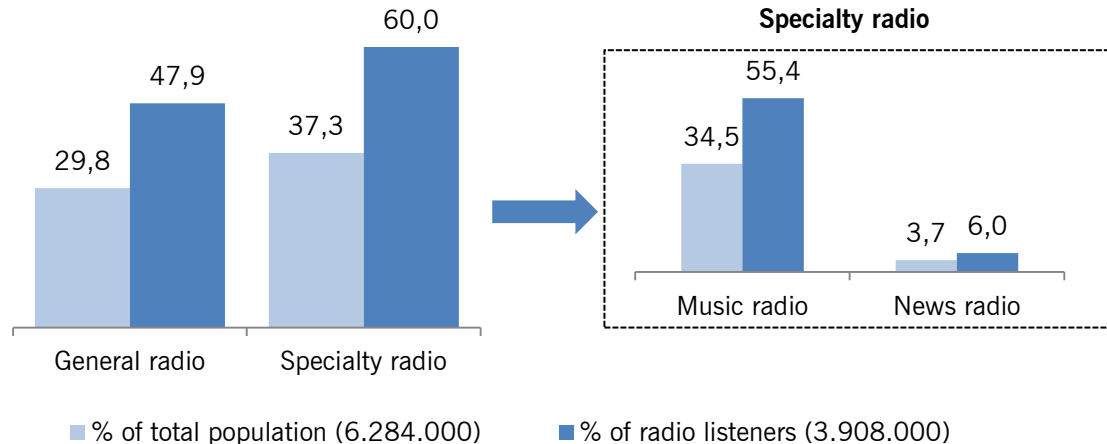
41 private radio broadcasters:
19 local radio
15 Spanish radio
7 Catalan radio

Source: Catalan Audiovisual Council. September 2015

Penetration and language of radio

Penetration

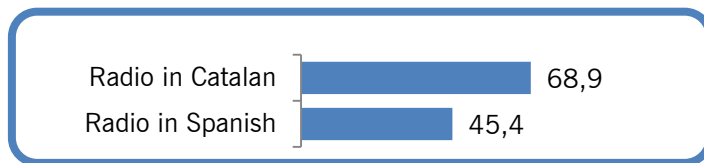
(%, day prior to interview)



The most widely listened to radio in Catalonia is music radio, with 55.4% penetration among listeners, followed by general radio with 47.9%. The least popular is specialty news, usually followed by 6% of listeners.

Breakdown by language of consumption out of total listeners

(%, day prior to interview)



Unlike the situation with television where Spanish has most channels and the largest audience, radio listeners mostly choose radio broadcast in Catalan.

Radio in Catalan: broadcasters with programming in Catalan and regional sections in Catalan of the main broadcasters in Spanish (general and specialty).

Radio in Spanish: broadcasters with programming in Spanish (general and specialty).

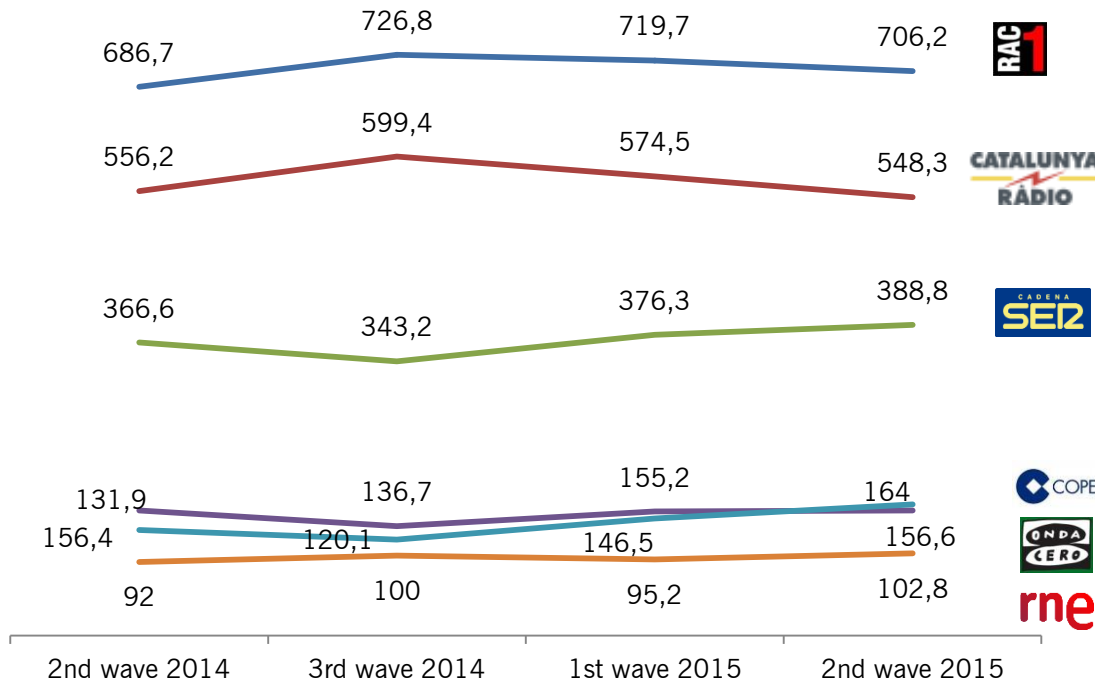
Note: given that radio listeners tend to watch more than one channel during the same day, the data are processed taking into account the fact that more than one answer is possible. This explains why the sum of the percentages is more than 100%.

Source: EGM Baròmetre Catalunya – 2nd wave 2015.

Radio audiences (1)

General radio ranking. Audience

(trend over last 4 waves, in thousands, day prior to interview)



RAC1 remains at the top of the ranking for general radio in Catalonia.

For the first time, in this EGM wave the Grup Flaix stations rank first for music radio, ahead of Los 40 Principales by Cadena SER.



Catalunya Informació leads the ranking for specialty news radio (see the next page).

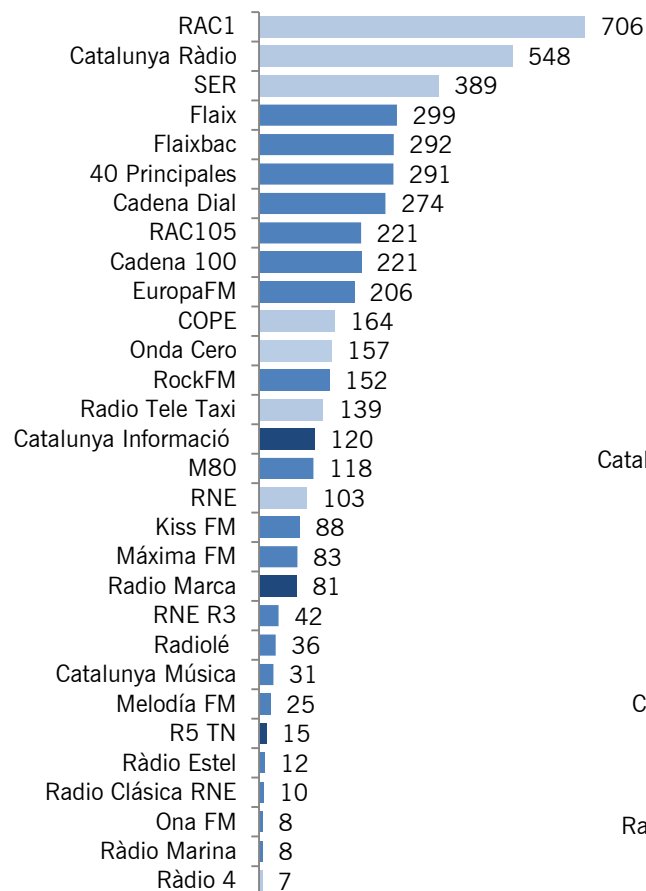
Source: EGM Baròmetre Catalunya – 2nd wave 2015.

Radio audiences (2)

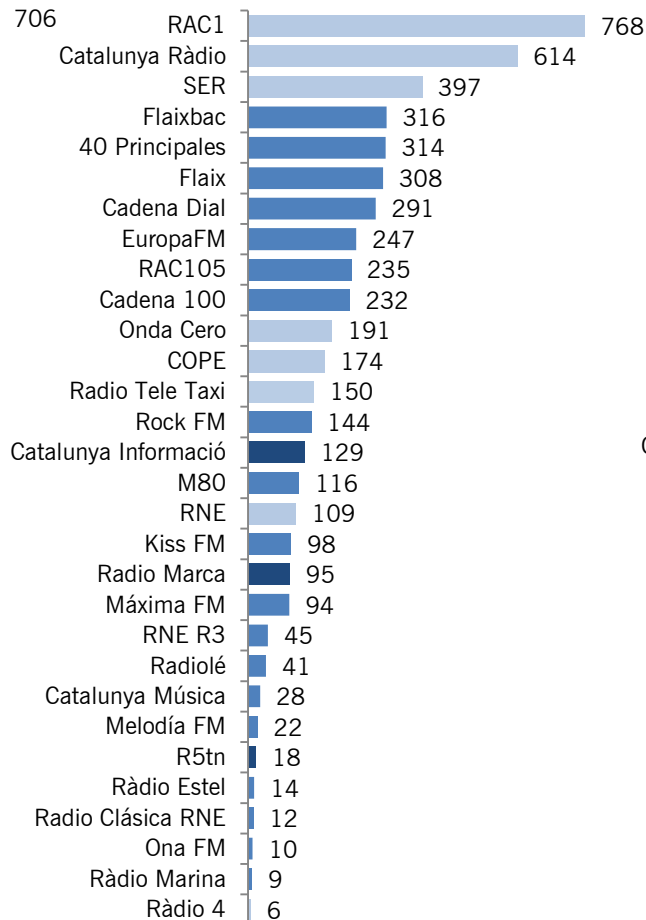
Cumulative daily radio audiences in Catalonia

(thousands, day prior to interview)

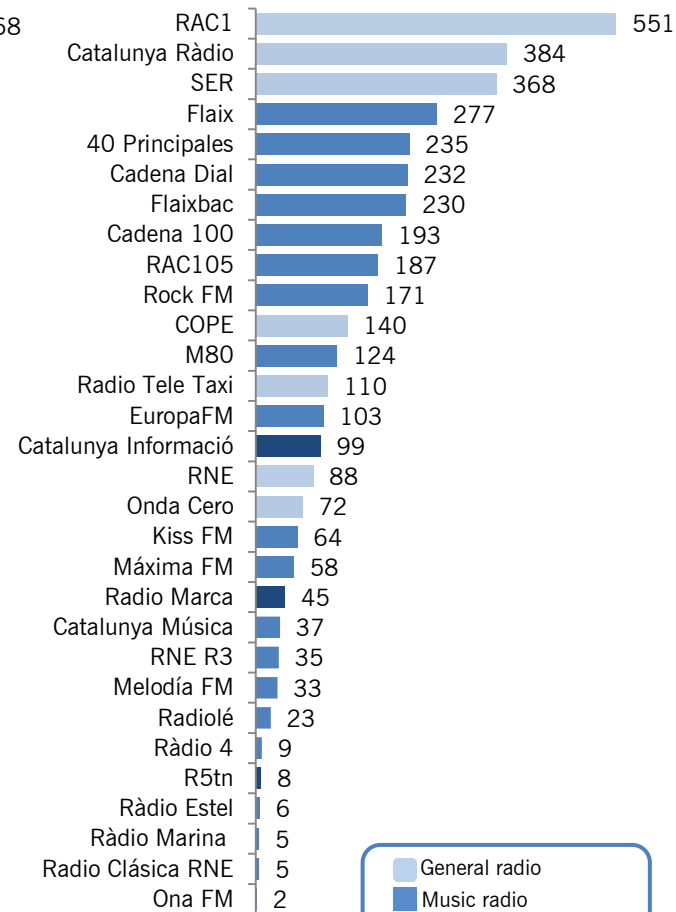
Monday to Sunday



Monday to Friday



Saturday & Sunday



General radio
Music radio
News radio

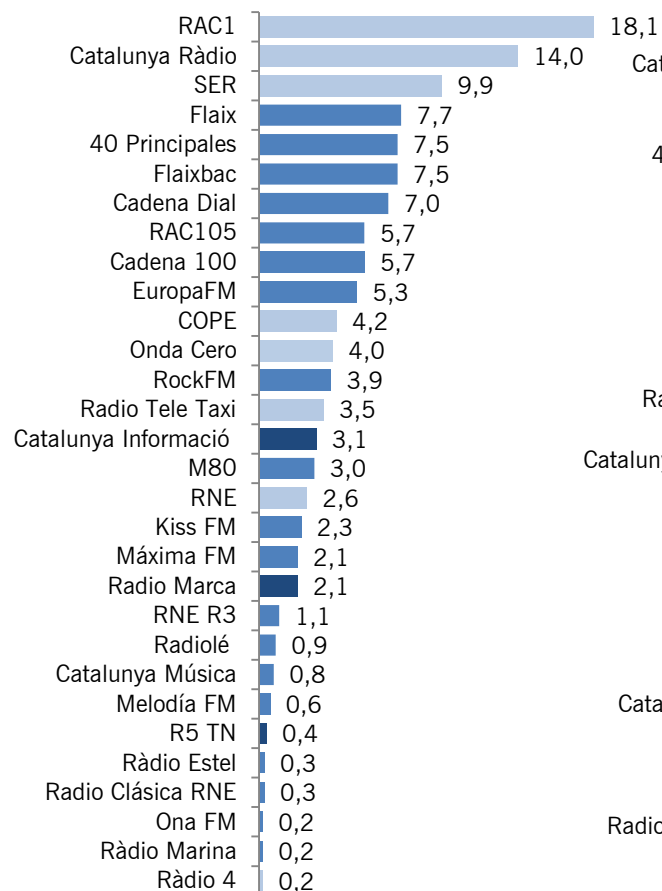
Source: EGM Baròmetre Catalunya – 2nd wave 2015.

Radio audiences (3)

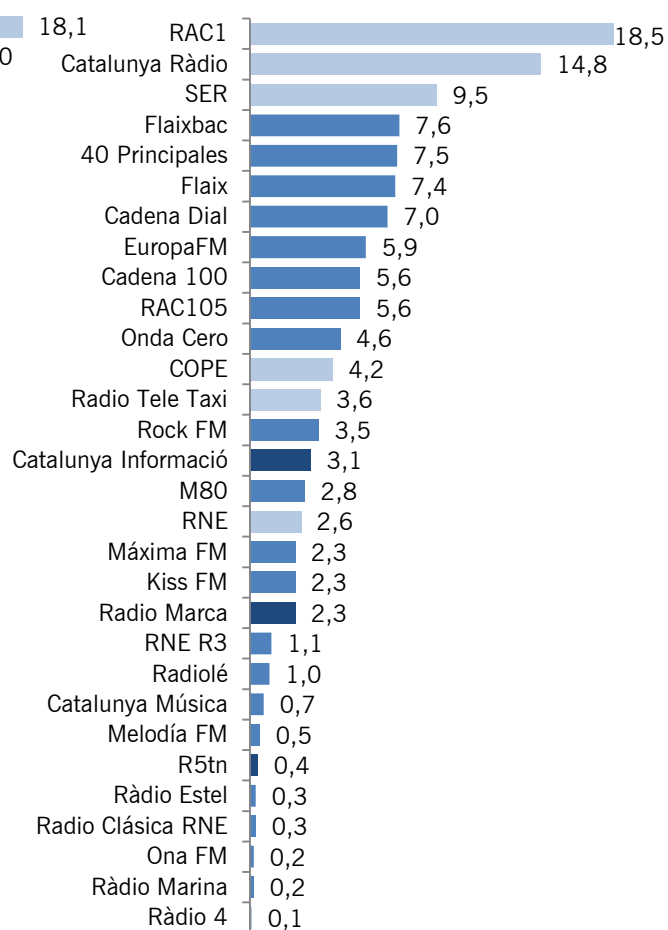
Cumulative daily radio audiences in Catalonia

(%, day prior to interview)

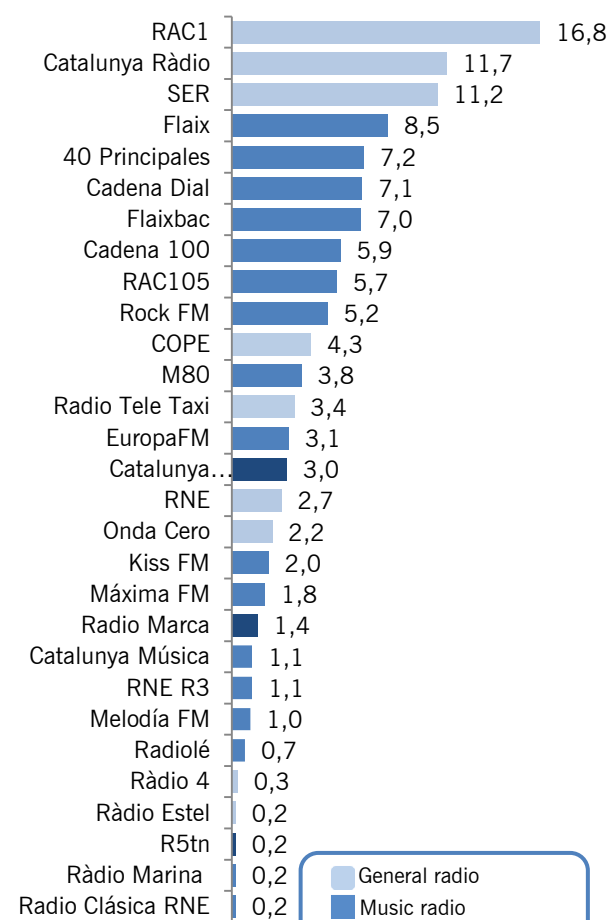
Monday to Sunday



Monday to Friday



Saturday & Sunday



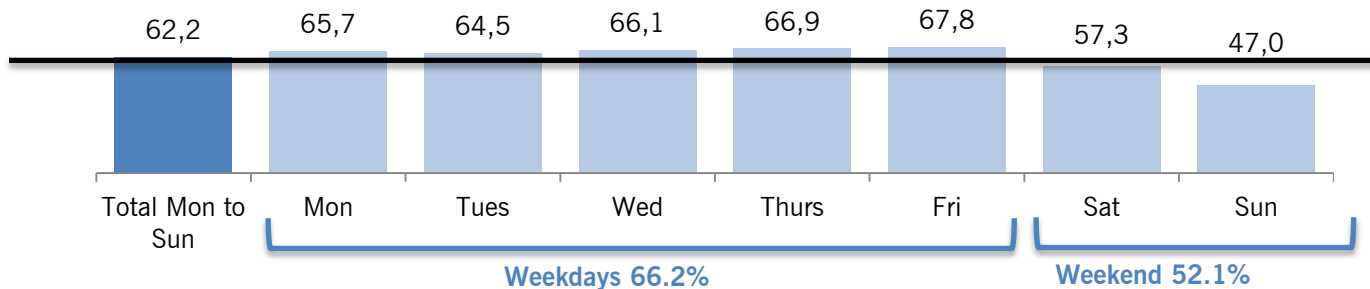
General radio
Music radio
News radio

Source: EGM Baròmetre Catalunya – 2nd wave 2015.

Penetration of radio and audience by time

Penetration

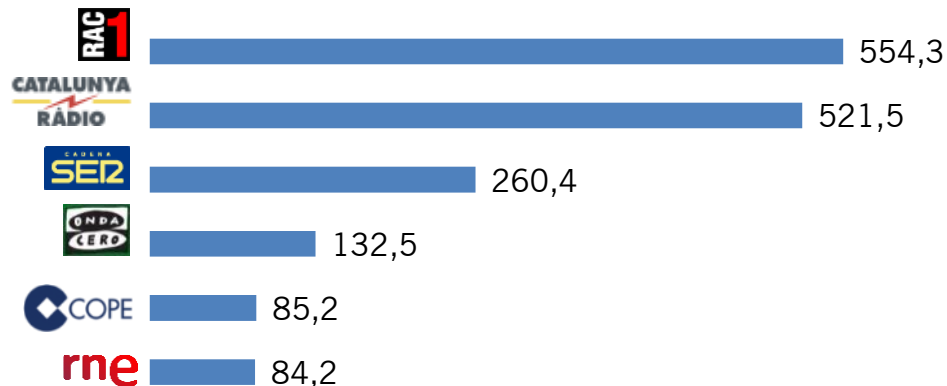
(% of total population, day prior to interview)



Audiences listen to the radio more during the week (66.2%) than at the weekend (52.1%).

Audiences for morning programmes on the main general radio broadcasters

(thousands of listeners, Monday to Friday)



Prime Time on the radio is in the morning, led by the two main general radio broadcasters in Catalan: RAC1 and Catalunya Ràdio.

Note: the morning programmes do not cover exactly the same time period. They all begin at 6 am but finish between 12 and 1 pm.

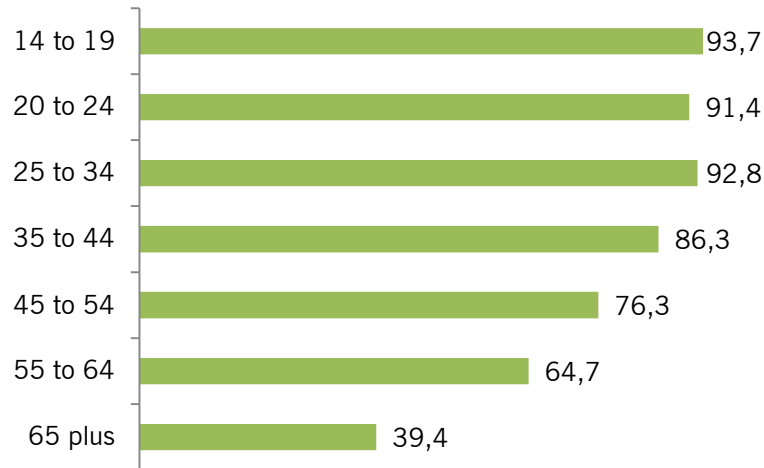
Source: EGM Baròmetre Catalunya – 2nd wave 2015.



Internet

Internet user profiles in Catalonia

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

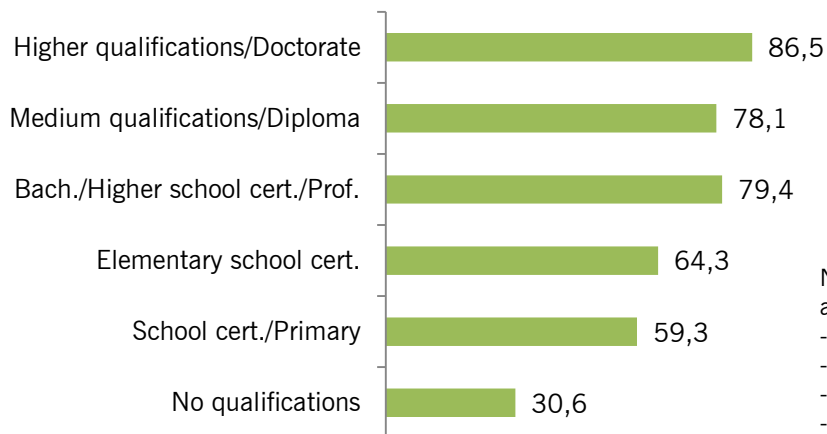


Internet penetration in Catalonia stands at 73.2% of the population (71.4% in the previous wave).

Internet use is growing the most among young people aged 14 to 19 (6 points higher than the previous wave). More than 93% of this age group connects every day.

The percentage of people using the internet gradually increases with the level of qualifications: those with higher qualifications use the internet the most.

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



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/graduate/elementary baccalaureate/primary study certificate/full secondary
- Higher baccalaureate/Higher school cert./LOGSE/Prof. Training II
- Diploma (3-year course)
- Graduate, degree, master, doctorate.

Source: EGM Baròmetre Catalunya - 2nd wave 2015.

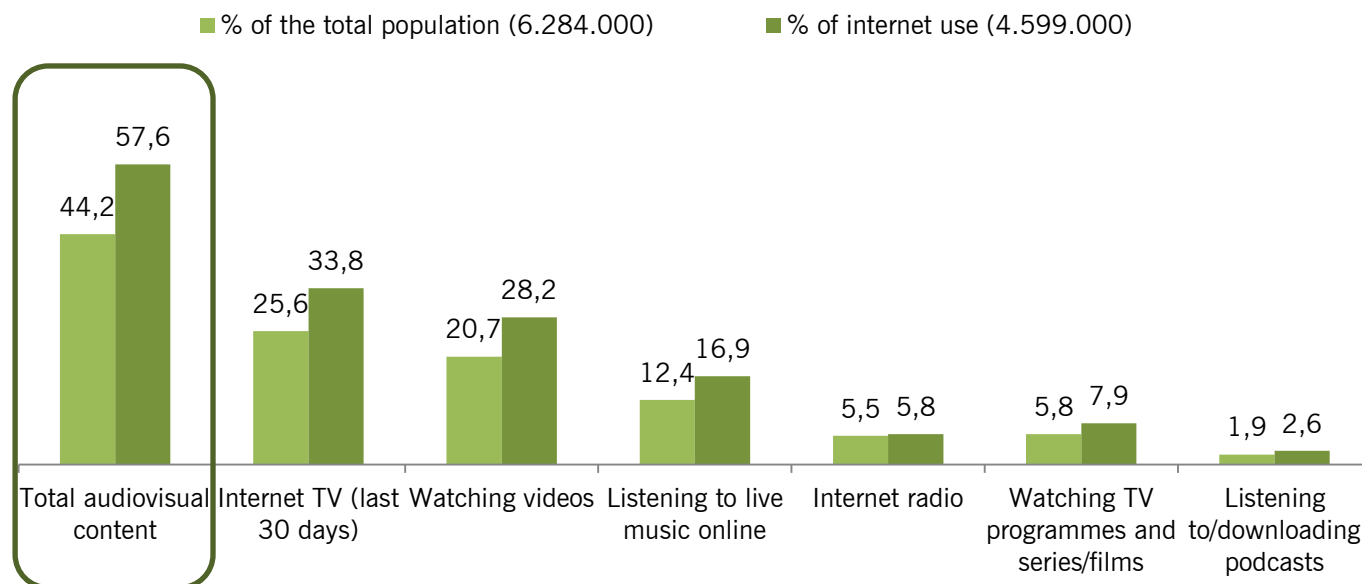
Consumption of online audiovisual content

Most of the people who connect to the internet, 57.6%, consume audiovisual content, mainly television and videos.

Almost 46% of the Catalan population connects to one or more social media sites and, according to the data from this EGM survey, social media users tend to consume more audiovisual content online than other internet users (66.2%).

Internet use by consumption of audiovisual content

(%, day prior to interview)



Source: EGM Baròmetre Catalunya – 2nd wave 2015.



Advertising

Advertising spend on conventional media

Advertising spend on conventional media. 1st six months 2015

(millions of euros, in Spain)

Conventional media	January-June 2014	January-June 2015	Trend (%)
Television	935,0	1.028,0	9,9
<i>Free Spanish TV</i>	846,1	925,6	9,4
<i>Autonomous Community TV</i>	60,0	66,8	11,3
<i>Pay TV</i>	28,9	35,6	23,0
Newspapers	282,8	278,6	-1,5
Internet	179,4	193,6	7,9
Radio	171,8	187,4	9,1
Outdoor	142,8	150,4	5,3
Magazines	131,2	131,7	0,4
Sunday Supplements	16,8	16,3	-2,7
Cinema	7,2	12,0	67,2
TOTAL	1.867,0	1.998,0	7,0

Advertising spend has grown by 7% in the first six months of 2015 compared with the same period in 2014, totalling 1,998 million euros.

Advertising spend has increased for all media except newspapers and Sunday supplements. TV is still the first choice, with more than one million euros.

Albeit with smaller quantities, of note are the increases in advertising spend on pay TV (23.0%) and cinema (67.2%)

Note: For the internet, the figures only correspond to graphic formats

Source: InfoAdex (2015).

Advertising spend on television

Advertising spend on television. 1st six months 2015 (millions of euros, in Spain)

Television	Advertising spend			Market share (%)	
	Jan-Jun 2014	Jan-Jun 2015	Trend (%)	Jan-Jun 2014	Jan-Jun 2015
Mediaset España	414,0	444,5	7,4	44,3	43,2
Atresmedia	397,7	440,5	10,7	42,6	42,8
Disney Channel	8,3	8,3	-0,2	0,9	0,8
Other free Spanish TV	25,9	32,3	24,9	2,8	3,1
Total free Spanish TV	846,1	925,6	9,4	90,5	90,0
Total Autonomous Community TV	60,0	66,8	11,3	6,4	6,5
Total pay TV	28,9	35,6	23,0	3,1	3,5
Total television	935,0	1.028,0	9,9	100,0	100,0

Advertising spend on TV has grown by 9.9% during the first six months of 2015, reaching 1,028 million euros. 86% of this total is taken by the groups Mediaset and Atresmedia.

Compared with the same period in 2014, advertising spend on the group of Autonomous Community TV has grown by 11.3%, with investment totalling 66.8 million euros. This trend gives Autonomous Community TV a market share of 3.5%

Note: The items of Mediaset and Atresmedia include the DTT channels owned by the chain (multiplex).

Source: InfoAdex (2015).

Digital advertising spend (1)

Digital advertising spend in Spain. 2014 (millions of euros)

Advertising formats	Desktop advertising	Mobile phone advertising	Digital signage
Display	358,7	27,7	
Direct advertising (+20% display)	71,1	5,5	
Search engines	560,9	9,7	
Total	990,7	42,9	32,0
Percentage	92,9%	4,1%	3,0%
Total digital advertising spend: 1,065.60			

Note: Digital signage is a format where content is provided via screens at the point of sale.

Source: Interactive Advertising Bureau (IAB Spain).
Estudio de Inversión en Publicidad Digital 2014. May 2015

The advertising spend on digital media in Spain in 2014 totalled 1,056.60 million euros, 10% more than the previous year.

Digital advertising accounts for 22.9% of all advertising spend and ranks second in the media, after television.

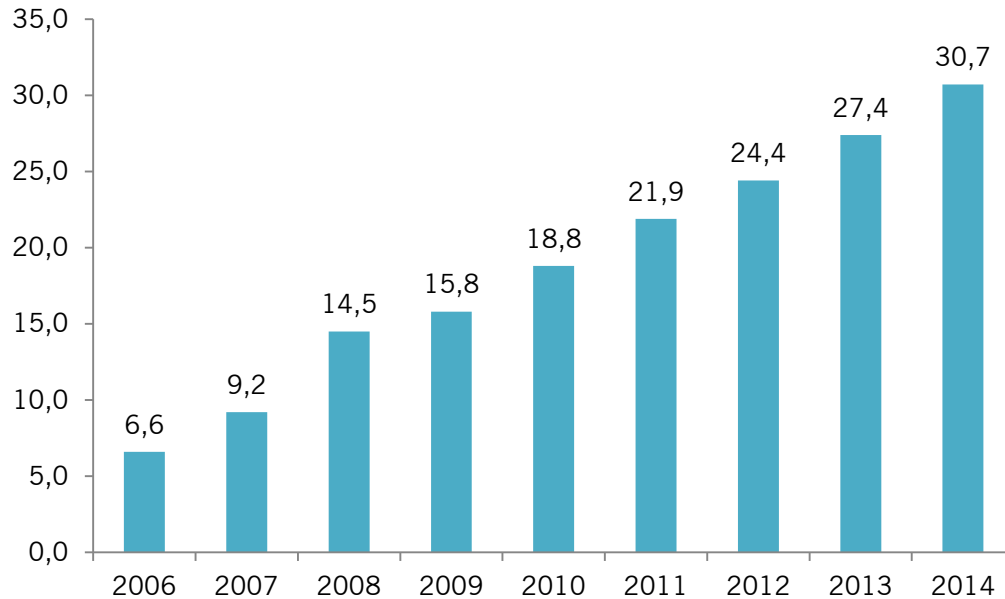


By format, website advertising is still the main choice for advertisers, although the spend on digital signage has risen notably, from 6.1 to 32 million euros in one year.

Digital advertising spend (2)

Digital advertising spend in Europe. 2014

(millions of euros)



Investment has doubled in the last 5 years in Europe as a whole, reaching a spend of 30.7 million euros.

This growth in digital advertising spend has brought it very close to the spend on TV (33.5 million).

The United Kingdom is the main market for digital investment in Europe. Spain ranks seventh out of ten countries.

The forecast by IAB Spain for growth in digital advertising spend for 2015 as a whole is 5% compared with 2014.

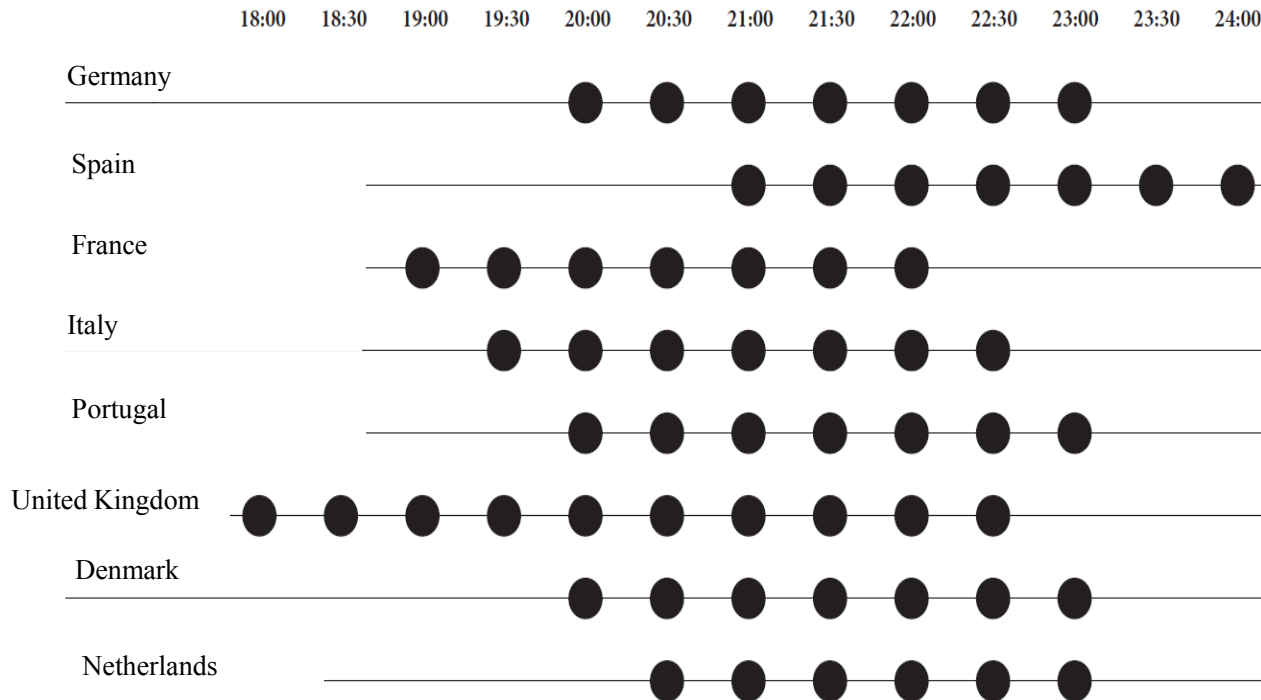
Source: Interactive Advertising Bureau (IAB Spain). *Estudio de Inversión en Publicidad Digital 2014*. May 2015



Note: Prime Time

Prime Time television (1)

Comparison of the Prime Time period in the main European countries. 2015



In Europe, Prime Time generally starts at 8 pm although it begins earlier in some countries, such as France, the United Kingdom and Italy.

In Spain, Prime Time starts at 9 pm and ends at midnight. This has a negative effect on the hours of sleep and personal performance, both at work and at school.

People's average number of hours of sleep in Spain is 50 minutes less than in the neighbouring countries.

Graph taken from: Iniciativa per a la reforma horària (2015). *Catalunya versus Europa: Quins horaris tenim?*, page 26.

Note: Prime Time is the period with the largest audience

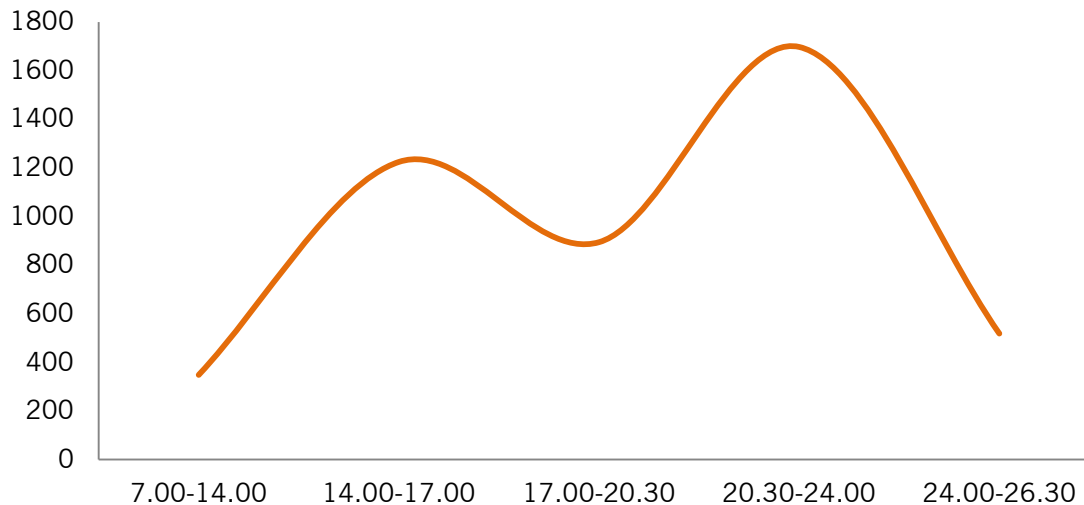
Sources: Iniciativa per a la reforma horària (2015a). *Document de base per al Dictamen del Consell Assessor per al Desenvolupament Sostenible (CADS) sobre la reforma horària* (2 September 2014); Iniciativa per a la Reforma Horària (2015b) "Catalunya versus Europa: Quins horaris tenim?", Col·lecció Reforma Horària, January 2015; Parlament de Catalunya (2015). *Informe i conclusions de la Comissió d'Estudi de la Reforma Horària*, Butlletí Oficial del Parlament de Catalunya, 14 July 2015

Prime Time television (2)

Spain has a particular feature in its TV consumption habits, namely two Prime Time periods during weekdays:

- From 2.30 to 5 pm
- From 9 pm to midnight

Audience for the main general channels (TV3, 8tv, La 1, Antena 3 TV, Telecinco, Cuatro and LaSexta) by time in Catalonia
(thousands)



Note: the example used is one weekday from the period in question (22 September 2015) to show the typical consumption with two peaks.

Source: CAC, based on data from Kantar Media.

The distribution of the daily audience into two peaks is due to a scheduling that's unique in the EU. On the one hand there's a very long break at lunchtime and, on the other, the work day tends to end later in the evening. This means that the time period just after lunch has a big audience and leisure in the evening, including TV consumption, starts later than in the rest of Europe.

This tendency is reinforced indirectly by the competition between the two main commercial channels in Spain (Telecinco and Antena 3 TV) to lead the late night period (midnight to 2.30 am or, in audience analysis terms, 24.00-26.30 hours).



Newsflashes

Newsflashes



Mediaset acquires 40% of 8tv, the Grupo Godó TV channel

The Catalan Audiovisual Council (CAC), via [Agreement 72/2015, of 20 May](#), authorised the modification of the share structure of the company Emissions Digitals de Catalunya in favour of Mediaset.



Abertis goes public

[Cellnex shares](#) went on sale on 7 May. Cellnex Telecom, formerly Abertis Telecom, billed 117 million euros in the first quarter of the year, up by 9% thanks to the towers bought in Spain and Italy in 2014. Its portfolio currently consists of 15,170 towers and, thanks to it going public, it now expects to grow and become more international.



The Catalan government's Premis Nacionals de Comunicació 2015 [National Communication Awards] recognise Canal Reus as a leading local TV provider

These [awards](#) have also rewarded the professional careers of Xavier Graset, Antoni Batllori, Salvador Cot and Agustí de Uribe-Salazar, as well as the work communicating the programme *Valor afegit* on TV3.



15 years of the CAC

On 12 June, the Catalan government held an act to commemorate the **fifteenth anniversary of the creation of the Catalan Audiovisual Council (CAC)**. Taking part were the President of the Generalitat, Artur Mas, the President of the Catalan Parliament, Núria de Gispert, the Chairman of the CAC, Roger Loppacher, and Francesc Codina, the CAC's first Chairman and rapporteur for [Act 2/2000, of 4 May, on the Catalan Audiovisual Council](#).



New channel for Atresmedia

On 30 June Gol Televisión stopped broadcasting and passed on its frequency to [Mega](#), the new free channel of the Atresmedia Group. The main target for this new channel are adult males.



The 8 free DTT channels taken to court can continue broadcasting

In July the Supreme Court agreed to waive the three contentious-administrative appeals brought by the companies Infraestructuras y Gestión 2002, SL, M&M Infonet Associated, SL, and Lofli Eventis y Medios, SL, demanding the 8 free DTT channels be closed down due to the claim that the licences had been granted illegally because no public tender had been held. Finally the Supreme Court filed the proceedings once the court had examined the financial agreement between the limited companies and the DTT private licence holders.

Newsflashes



Concentration in the pay TV sector

Movistar TV and Canal+ merged at the beginning of July to create **Movistar+**, Telefónica's pay TV platform that totals 3.6 million clients in Spain. The [National Authority for Markets and Competition \(CNMC\)](#) approved the operation, with some conditions. Previous mergers have occurred between Vodafone and Ono, and Orange and Jazztel.



Revision of the European Directive on audiovisual media

On 6 July the European Commission launched a [Public Consultation](#) on Directive 2010/13/EU on Audiovisual Media Services (AVMSD). This consultation has two aims: first to check which parts of the Directive are currently fit for purpose as part of the Regulatory Fitness and Performance Programme (REFIT) and, second, to collect evidence and views on the future media services policy in the form of an impact assessment. On 6 May, in the [Communication on a Digital Single Market Strategy for Europe](#), the Commission announced a review of the Directive in 2016.



Equal television content

The Catalan government passed [Act 17/2015, of 21 July, on the effective equality of men and women](#) whose article 25 states the obligations of the media in this area. Of note among these duties is the need for the programme contract of the Corporació Catalana de Mitjans Audiovisuals (CCMA) to include mechanisms that ensure men and women are equally represented and that make the situation of women visible.



Europe wants to guarantee pluralism

The European Commission has established a [call for proposals](#) for the further application of the [Media Pluralism Monitor tool](#) (MPM). The MPM is the body set up by the Commission in 2009, designed to identify potential risks to media pluralism in EU Member States. The selected project should go beyond the initial proposal of the MPM and also, where relevant data is available, monitor the evolution of said risks as compared to previous assessments.

Newsflashes



European Commission: public consultation on the review of the EU Satellite and Cable Directive

On 24 August, the European Commission launched a [Consultation on Directive 93/83/EEC](#), of 27 September, on the coordination of certain rules concerning copyright and rights related to copyright applicable to satellite broadcasting and cable retransmission. This consultation forms part of a broader review of the Directive, one of the 16 initiatives announced by the Commission in its Digital Single Market Strategy. The consultation is open from 24 August to 16 November 2015.



Television treatment of the Germanwings air crash

In May, the CAC issued a [report on the news treatment received by the Germanwings air crash](#) by the TV channels. Of note is the fact that TV3 was the channel devoting most time to this news item, adopting a less sensationalist approach.



The CCMA fulfils its public service missions

The CAC has analysed Catalan public corporation radio and TV broadcasters, in accordance with the mandate of Act 22/2005, of 29 December, on audiovisual communication in Catalonia, and [concludes](#) that, in 2014, the CCMA fulfilled the missions it has been assigned as a public service provider.



InCom presents its Report on Communication in Catalonia 2013-2014

This [report](#) analyses Catalonia's communication and technology context as well as the situation of communication industries and media, and attempts to define the challenges facing the sector over the coming years. The special theme chosen is institutional and corporate communication.



Presentation of two studies focusing on an analysis of the state of radio

On the one hand, the Associació Catalana de Ràdio has produced the [Report on the situation of radio in Catalonia in the period 2007–2014](#). On the other, the [Report of the Radio Observatory 2008-2011](#) was presented, a study coordinated by Josep Maria Martí and Belén Monclús, from the OBS.

BIAC. No. 2 – Second four months of 2015

Main sources:

- CAC: the council's own data.
- Kantar Media: data from the second four months of 2015. Details: Area of Catalonia. Data obtained using a people meter for individuals aged 4 and upwards.
- EGM Baròmetre Catalunya: data from the 2nd wave 2015. Period April-June 2015. Details: Area of Catalonia. Sample proposed for 2015: 33,584 interviews with individuals aged 14 and upwards (2,409 multimedia interviews, 5,395 single medium - radio, 1,295 single medium – press and 2,357 single medium - magazines).

Bibliographic citation:

CATALAN AUDIOVISUAL COUNCIL. *Butlletí d'informació sobre l'audiovisual a Catalunya* (BIAC). [Newsletter on the Media Sector in Catalonia]. No. 2. Second 4 months of 2015. Barcelona: CAC, September 2015. www.cac.cat