

One country, two media systems: The evolution of the media audience in Catalonia in the context of the independence debate

*Un país, dos sistemes mediàtics: l'evolució de l'audiència
dels mitjans a Catalunya i l'impacte del debat
sobre la independència*

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ABSTRACT:

Following the theories of media system dependency (MSD), this paper analyses the media audiences in Catalonia and their evolution in the context of the independence debate. Serial data from the 1980s to 2014 on mainstream media audiences in Catalonia (TV, radio and press) show how the newspaper market is historically dominated by outlets from Barcelona, while the TV market is mostly controlled by Spanish TV channels. There has also been a switch in the radio market in the last decade, when the Catalan radio stations have become hegemonic. Significant differences in the average audience growth of audiovisual media have been detected the last term of every year since 2012 (as long as demonstrations and votes have mobilized the population), differences which have been especially notable for the Catalan outlets.

KEYWORDS:

media system dependency, audience measurement, audience behaviour, news media, Catalan media, Spanish media.



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RESUM:

Seguint les teories de la dependència del sistema de mitjans (en anglès, MSD), aquest article analitza les audiències dels mitjans a Catalunya i la seva evolució en el context del debat sobre la independència. Les dades en sèrie de les audiències dels mitjans tradicionals a Catalunya (televisió, ràdio i premsa), dels anys vuitanta del segle passat fins al 2014, mostren que el mercat de diaris està dominat històricament pels mitjans de Barcelona, mentre que el sector de la televisió està controlat, majoritàriament, per canals de televisió espanyols; també, que hi ha hagut un canvi en el mercat de la ràdio en l'última dècada, en què les emissores de ràdio catalanes s'han convertit en hegemòniques. S'han detectat diferències significatives en el creixement mitjà de l'audiència dels mitjans audiovisuals en el darrer període de cada any, des del 2012 (coincidint amb el període de manifestacions i votacions que han mobilitzat la població), especialment rellevant per als mitjans catalans.

PARAULES CLAU:

dependència del sistema mediàtic, mesura d'audiència, comportament de l'audiència, mitjans de comunicació de notícies, mitjans de comunicació catalans, mitjans de comunicació espanyols.

Introduction

One of the main questions traditionally focused on by media studies is the behaviour of the audience. The consumption of media cannot be explained simply as a bidirectional relationship between a free consumer and his/her chosen outlet; it also involves their political and social contexts. The media system dependency (MSD) theory assumes that the effect of media can only be understood in a tripartite relationship between individuals, media and society (Ball-Rokeach and De Fleur, 1976). According to its authors, people have a dependency on media consumption, seeking to satisfy the need to understand their social world, the need to act meaningfully and effectively in that world, and the need for fantasy-escape from daily problems and tensions. The greater their needs, the greater their dependency on media and the ability of media to alter audience cognitions, feelings and behaviours.

This theory describes two conditions that heighten this influence, one concerning the media and the other, society. The first one assumes that some media information functions are more socially central than others. The greater the number and centrality of specific information media, the greater the audience and the societal dependency on those media. The second condition occurs when a relatively high degree of change and conflict is present in a society: structural instability intensifies people's dependence on media information.

These two conditions (number and centrality of media, and a period of conflict and changes) are the object of this study in a context of competing media systems. It analyses the media audience in Catalonia, a region with a strong self-identity, its own language, and two media systems (the Spanish and the Catalan), that has been marked, since 2012, by an emergent social and political mobilization in favour of independence from Spain. The evolution of media consumption in the region in the last few decades and the behaviour of the audience in recent years, since this movement emerged, are the two aspects analysed in this paper from a quantitative perspective.

MSD combines the micro-level and the macro-level perspective of media studies since it implies that society is necessary to understand the effects of media on individuals. It follows the classical argument by Emile Durkheim (Ball-Rokeach and Jung, 2009) that media are essential to the development of a modern society, and extends it to the point that media form a system which is central to the functioning of personal and social life. It also shifts from the premise that media power rests upon the power to persuade to regard media as an informational system, evaluate media products according to their potential information value, mix entertainment and news, and focus on the relation between producers and active consumers.

Media systems

MSD presumes the existence of a media system, which can be defined as all mass media organized or operating within a given social and political system (Hardy, 2012). Jonathan Hardy explains that this concept initially referred to “national” media systems and became widely used after 1945, when there were clear vertical links between national governments and the regulation of media communications, and national media were mostly owned by large national firms and were predominantly oriented towards markets within a nation-state.

Denis McQuail also links a media system to a nation, defining it as the actual set of mass media in a given national society, despite the fact that there may be no formal connection between the elements (2010). Actually, the author also highlights that “in most countries the media do not constitute a single system, with a single purpose or philosophy, but are composed of many separate, overlapping, often inconsistent elements, with appropriate differences of normative expectation and actual regulation”.

So a connection between media system and political system has been established in the most commonly used definition of the term. As reflected in the classic *Four Theories of the Press* (Siebert *et al.*, 1956), the press always takes on the form and coloration of the social and political structures within which it operates, and it especially reflects the system of social control where the relations of individuals and institutions are adjusted (quoted in McQuail, 2010).

Hallin and Mancini (2004) identified three fundamental models of the relationship between national media systems and political systems after studying seventeen Western democracies: the liberal model (in the United States and also in a modified form in the United Kingdom and its former colonies), the polarized pluralist model (in Southern Europe) and the democratic corporatist model (in Northern Europe). They classified them according to four major dimensions: the emergence of mass-circulation press, the involvement of the state in the media, the degree of political parallelism between the media and the state (or external pluralism), and the degree of professionalization.

The Spanish media system belongs to the polarized pluralist model, typical in the Mediterranean countries in Europe. It is characterized by the interventionist role of the state in the media system, in which the state has some ownership control of media, grants subsidies and is involved in the financing of newspaper sales. This strong role of the state has provided leverage to Spanish national TV and radio outlets versus the regional outlets, due to regulation favouring their implementation (Gifreu, 2013 and 2014; Zallo, 2013).

Spanish autonomous regions constitute a subnational area for media circulation. Some of them, however, are self-identified and are in some sense recognized as nations, with their own culture and language, such as Catalonia, the Basque Country and Galicia (which are defined as “nationalities” in the Spanish Constitution).

They have autonomous media systems competing with the Spanish system for the audience and also for imposing a viewpoint and the agenda (Zallo, 2013). The political debate in these regions has special features: these regions present more alternatives than the traditional left-right cleavage since their media are also positioned with respect to the autonomous/Spanish alternative. So the media system in these nations within Spain includes an in/out dimension with a strong duality between Spanish outlets and the autonomous ones struggling to be hegemonic and to become the reference. It is from this perspective that it is considered that Catalonia has its own media system (with an autonomous public broadcasting system and its own private media groups, advertising market and regulatory authority), coexisting with the Spanish media system.

Influenced by the Catalan and the Spanish situation, Daniel E. Jones defines the notion of “communication space” as the relationship between culture and social media and a specific territory, together with common and individual interests (2007). This geostrategic view refers to the reception area and the group of media consumers living in a specific territory. However, Jones also warns that these spaces may not correspond exactly to political structures or to homogeneous cultural realities because several media spaces may overlap and individuals may feel closer to one of them or to none. They are not hermetic and their boundaries may be more or less precise.

The existence of a Catalan media system which lies within the boundaries of the Spanish media system that is in harmony with the structure of a state has been theorized by some academics (such as Francesc Pallarès, Joan Corbella and Rosario de Mateo; summarized by Berrio [1997]) since General Francisco Franco died in 1975. After nearly four decades of dictatorship, Spain turned to democracy, lifted the ban on the Catalan language in the public sphere, and allowed a certain decentralization of power with the recovery of Catalan autonomy.

The Spanish mass media system took shape in Spain especially in the 1950s, with the introduction of television, launching, in conjunction with the state radio, a public broadcasting system closely linked to the regime (González, 2016). Although Barcelona published newspapers, the Catalan media system had to wait for democracy to see the light. In 1983 the Catalan Government created Catalonia's own public broadcasting system, with one television and one radio station.

In the 1980s, the Catalan institutions and cultural movements struggled to establish Catalonia's own media system with the Catalan language as its backbone. Catalonia was therefore a region with three coexisting communication “circuits” (Gifreu, 1983):

The Catalan circuit was produced, distributed and consumed within Catalonia and had Catalan as its preferred language although Spanish was also present. It included daily and weekly press, Catalan books, small radio stations, cinema and music productions and some decentralized programmes in the Spanish public TV (TVE).



The Spanish circuit was by far the most dominant and influential in society. Contents originated in Madrid, exclusively in the Spanish language, and were distributed radially throughout the state. It included most of the non-daily press consumed in Catalonia, books in Spanish, the main radio stations, the public TV (private channels did not arise until the 1990s and were only Spanish), the cinema, the press agencies, and most of the music.

The international circuit, which is hard to describe because its flows tend to seep into the other two circuits in a subtle way, adapting to the market needs. It includes translated books, music, TV productions, international news supplied by big agencies, international brands' advertising, videotapes and video games.

In its initial stage, the concept of "Catalan communication space" was coined and developed by some Catalan academics from a normative perspective, and the research in the field was devoted to answering the question of which policies should be adopted to strengthen the media in Catalan in all the territories where this language is spoken, including mainly the Valencia Region, the Balearic Islands and the so-called Pays Catalan in the south of France as well as Catalonia itself (Moragas Spà, 1986; Gifreu and Corominas, 1991; Gifreu and Tresserras, 2007).

Methodology

The scope of this study will thus be Catalonia, where the market of mainstream media consumers reflects the coexistence of nation-wide Spanish outlets, whose content is mostly produced in Madrid, together with regional outlets whose content is mostly created in Barcelona. The latter have traditionally been hegemonic in the press and have grown to hold a majority share in radio in the last decade, while TV has always been dominated by the Spanish outlets.

Following the two conditions assumed by the MSD in order to determine the influence of media (their centrality and social uncertainty), the following hypotheses will be tested:

1. Trends in audience data indicate a central position of both the Catalan and Spanish media systems in Catalonia, as each one represents a substantial portion of the audience that is stable over time.
2. Considering the emergence of the independence debate in the Catalan institutions in 2012 as the beginning of a period of conflict that still endures, significant differences in the evolution of media audiences in the main broadcasting media in the last term of the year, coinciding with periods of high political intensity, will be found since then.

The basis for the analysis is formed by data extracted from the *Estudio General de Medios* (EGM), a study directed by the Asociación para la Investigación de los Medios de Comunicación (AIMC), an association of companies linked to advertising

and media, following a Joint Industry Committee structure (JIC) common in the European countries, in which media outlets jointly agree on the terms of audience measurement and then invite research companies to conduct it (Green, 2007). AIMC has tested the audiences of the main outlets throughout Spain and its regions by conducting surveys since 1975. Particularly for the Catalan universe, EGM yearly interviews samples of 23,449 people over 14 years old for radio listeners (margin of error of $\pm 0.19\%$, with a confidence level of 95.5%), 11,162 for press readers ($\pm 0.33\%$), and 7,227 for TV viewers and multimedia users ($\pm 0.35\%$). This was the size of the sample in 2015, but it has been increasing over the years.² Interviews are conducted in three waves every year (disclosed in April, July and December) and they are mostly carried out face to face and, complementarily, by telephone (Gabardo Vallejo, 2014). The interviewees are asked what TV/radio/newspaper they consumed the day before.

Although AIMC publishes annually a general framework of the Spanish audiences, including a historical evolution of media consumption, serial data dealing exclusively with the Catalan universe were unpublished and are provided in this paper for the very first time. All the results correspond to the daily consumption of mainstream media, aggregating data for the three annual waves of surveys. The period analysed depends on the oldest data obtained, which is different in each medium.

Social media and online outlets have been excluded from this study (at least in its initial stage) due to the inexistence of a measuring instrument similar to EGM which includes a wide range of sites.

In the analysis, besides the variable concerning the type of medium (newspapers, radio or TV), another variable has been introduced, which is whether an outlet belongs to the Catalan media system or to the Spanish media system (or, simply put, Spanish outlets versus Catalan outlets), according to the following definitions:

A Spanish outlet is defined in this paper by the following requisites:

1. Its main newsroom is located in Madrid (or anywhere else in Spain except Catalonia).

2. Its informative contents are mostly produced out of Catalonia, but in Spain.

3. Its targeted audience is the entire Spanish population.

A Catalan outlet, on the other hand, is defined by the following factors:

1. Its main newsroom is located in Barcelona (or anywhere else in Catalonia).

2. Its informative contents are mostly produced in Catalonia.

3. Its targeted audience is pre-eminently the Catalan population.

These categories should ideally consider some nuances, such as the fact that almost all the Spanish outlets have a secondary newsroom in Barcelona and, consequently, a part of their contents is produced in Catalonia, with regional sections in newspapers and opt-out programming on TV and radio stations; or the fact that some Catalan outlets reach beyond the Catalan territory, with TV and radio broadcasts in other Catalan speaking regions, and newspapers distributed in Madrid or

other parts of Spain. Nevertheless, these nuances should not invalidate these two categories insofar as they represent a minor part of the journalists/content/audience of the media.

Another discussion could be raised by the non-inclusion of the origin of the ownership in the conditions of categorization, as some Catalan outlets belong or belonged in the past to non-Catalan groups and some Spanish outlets had an important participation of Catalan media groups. Undoubtedly, ownership is one of the major factors conditioning the editorial line of an outlet, as the owners may be (in a minor proportion) advertisers and public administrations providing subsidies. However, other elements intervene in the frame-building of news, such as journalists and external sources (Scheufele, 1999) and there is the requirement that the frames transmitted through media should be shared by the audience in order to be understood, as frames are tied in with culture (Weaver, 2007).

Language is also excluded as a variable to categorize media although it could be a crucial factor to explain the choices of the audience. The Catalan language has been a driving motivation for the conception of the so-called "Catalan communication space" (Gifreu and Corominas, 1991; Gifreu and Tresserras, 2007), which makes the language a core element of its media system, conceived to embrace not only Catalonia but the whole Catalan linguistic area (mainly including the Valencia Region and the Balearic Islands). The language is considered the most distinctive discriminant factor in the relationship between media ecosystems and language ecosystems (Gifreu, 2014).

However, this variable has been excluded from this analysis because, in general terms, all the Spanish outlets produce their content in Spanish while nearly all the Catalan outlets do so in Catalan, except for some bilingual newspapers which publish separate editions in Catalan and Spanish every day, with the same content (*La Vanguardia*, *El Periódico* and the provincial *Segre*).

Two methodological comments should be clearly made to allow an understanding of the figures. Firstly, this study seeks to take full advantage of all the data provided by EGM in order to obtain the largest picture possible, although not all the media audiences have equivalent data available for the same period. This premise implies using different time scopes depending on the media: according to the database supplied, comparable annual data of newspaper audiences in Catalonia go back to 1986; however, equivalent data of TV media on a regional scale go back to 1997 and, in the case of radio audiences, similar data are not available until 2002 (before, data were not provided in terms of radio channels). As for quarterly data, the oldest available is from 2004, corresponding only to TV and radio audiences. This explains different starting years in the analysis. Moreover, there is also a limitation on the study of the total magnitudes of the audience beyond 2014 because one of the media holdings measured (Mediaset, owner of the TV channels Telecinco and Cuatro) abandoned the joint industrial committee responsible for the survey in 2015.³ This limitation determines the last year of the descriptive study but

it has not jeopardized the regression analysis, ending in 2017, since it processes each quarterly audience's outlet as a unit of analysis and does not operate at an aggregate level.

The second methodological note is that, in this paper, additions are made of the audience of several media in order to compare the magnitudes of readers/listeners/viewers, but they do not reflect the total amount of people since the consumption of one outlet does not exclude the consumption of others by the same interviewee.

Trends in media audience in Catalonia

As a starting point, the collected information shows that media consumption in Catalonia has undergone in the last decade similar tendencies as elsewhere in the Western countries (Table 1): a decline in newspapers readers, a dramatic increase of Internet consumers (making it the second platform in terms of audience last year), and stability of TV viewers. More particular is the evolution of radio listeners, who have been progressively growing after a drop in recent years in Spain as a whole.

These trends of media usage in Catalonia are consistent with those reported around the world. According to Zenith's Media Consumption Forecast 2016 based on time spent consuming media in 71 countries (Austin *et al.*, 2016), TV still dominates by far global media consumption (177 min per day in 2015) although there has been a slightly downward trend in recent years (190 min in 2010). Internet is

	NEWSPAPERS	INTERNET	RADIO	TV
2004	45.8	20.3	56.0	88.0
2005	44.8	23.7	55.6	88.8
2006	45.6	27.8	55.1	87.7
2007	45.1	31.3	52.3	86.4
2008	45.8	36.1	52.5	87.1
2009	43.6	40.0	56.1	87.0
2010	42.4	45.4	57.8	85.7
2011	42.2	50.6	59.7	87.2
2012	39.0	55.5	64.7	87.4
2013	35.2	61.0	63.0	88.6
2014	31.4	67.7	60.6	87.7

Table 1. Evolution of media penetration in Catalonia

Source: Prepared by the author from data supplied by EGM.

the second option (110 min per day in 2015), and its consumption time has doubled in just five years (45 min per day in 2010). Time spent listening to the radio (55 min per day in 2015) has followed a slightly downward trend around the world (60 min in 2010), in contrast to Catalonia. But the biggest losses in terms of consumption are for newspapers, for which reading time has dropped by almost one third (14 min in 2015 versus 20 min in 2010). The results in Spain show a longer time spent by the audience watching TV (234 min per day in 2010 and 2015) and listening to the radio (105 min per day in 2015, and 107 min in 2010), with a shorter time devoted to the Internet (103 min per day in 2015, 57 min in 2010) and to newspapers (10 min per day in 2015, and 15 min in 2010).

In this context of progressive decline in press reading, the four newspapers published in Barcelona (*La Vanguardia*, *El Periódico*, *Ara*, *Avui/El Punt Avui*) sold 386,238 copies in 2000, while the four papers published in Madrid and distributed as well in Catalonia (*El País*, *El Mundo*, *ABC* and *La Razón*) sold 95,686 copies in that year. This proportion of Catalan press in 2000 (80.1 %) remained quite stable for more than a decade (82.7 %) up to 2012. The four outlets from Barcelona accounted for 299,497 papers sold that year, while those from Madrid sold 62,775 copies (Corbella Cordoní, 2013).

This dominance of the press published in Barcelona in terms of sales is also reflected in audience tests. Table 2 shows that *El Periódico* and *La Vanguardia* (owned by Grupo Zeta and Grupo Godó, respectively) have remained for almost four decades the most widely read newspapers in Catalonia, with results far above those of their competitors.

Other than in the audiovisual sector, in the press field the fact of being published in Barcelona does not imply the use of the Catalan language. Actually, for many years the two main newspapers were in Spanish alone. In 1997 *Segre* and *El Periódico* introduced a Catalan version, so since then they can be found on the press stands in both languages. *La Vanguardia* followed the same path in 2011 (Gifreu, 2014).

The leading newspaper published in Madrid, *El País*, has historically stood in third place in this ranking (excluding the free press and sports press) until very recently: it was surpassed by *El Punt Avui* (created by the merger of the pioneering historical newspaper in Catalan, *Avui*, and the most widely extended regional newspaper, *El Punt*, originally from Girona) for first time in 2014. That year the three most widely read written outlets in Catalonia were published in Barcelona, as was the fifth, *Ara* (created in 2010). Subsequently, a sixth newspaper, which had historically maintained about 100,000 readers, appeared on the chart: *Segre*, a regional paper published in the city of Lleida and distributed in Lleida province.

Outside of this ranking are the rest of the newspapers published in Madrid, which in 2014 had an overall 64,000 readers, and the rest of the Catalan regional press, which had 147,000 readers in that year, according to EGM.

Considering all the readers of these outlets, which are aggregated and categorized according to their origin (whether if they are published in Madrid or in

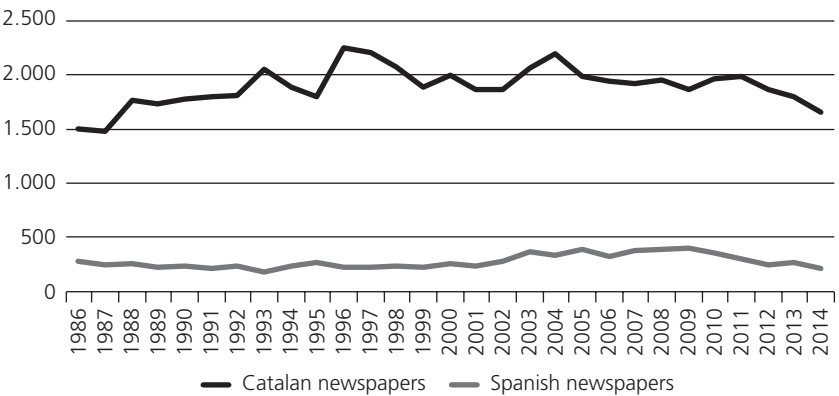
1986		1996		2006		2014	
1. El Periódico (C)	600	1. El Periódico (C)	952	1. El Periódico (C)	720	1. La Vanguardia (C)	654
2. La Vanguardia (C)	567	2. La Vanguardia (C)	698	2. La Vanguardia (C)	667	2. El Periódico (C)	485
3. El País (S)	205	3. El País (S)	173	3. El País (S)	221	3. El Punt Avui (C)	151
4. Avui (C)	143	4. Avui (C)	158	4. El Punt (C)	144	4. El País (S)	148
				5. Avui (C)	114	5. Ara (C)	118
						6. Segre (C)	102

Table 2. Generalist daily newspapers with over 100,000 readers in Catalonia
(Thousands of readers. C indicates Catalan outlets; S indicates Spanish outlets)

Source: Prepared by the author from data supplied by EGM.

Catalonia), Graph 1 shows the considerable gap between the consumption of Catalan press (practically always more than 1,500,000 readers) and that of the Spanish press (never exceeding 400,000). 1996 registered the largest difference between the two media systems (the Catalan press audience was over 2,250,000 readers, while that of the Spanish press was 2 million less, with 219,000 readers). In 1986, this difference was the smallest, comprising just 1,226,000 readers (1,505,000 readers for the Catalan newspapers versus 279,000 for the Spanish ones). The graph also reflects the decrease in readers for all the printed daily media in recent years. Note that the sum of readers does not imply that this is the number of people actually reading newspapers, because readers may be shared among several outlets.

As opposed to that trend, the generalist radio is experiencing a golden age in Catalonia, with a major expansion of the audience (1.8 million listeners in 2014,



Graph 1. Daily newspaper readers in Catalonia (in thousands), by media systems

Source: Prepared by the author from data supplied by EGM.

which is nearly 0.3 million more than in 2002). Two Catalan stations have conquered the lion's share of the market in the last decade (RAC1 and Catalunya Ràdio), with a joint total of 1,246,000 listeners in 2014 (around the 60 % of the market), while the Spanish stations (SER, Onda Cero, Cope and RNE) totalled 797,000 listeners in that year. This majority position of the audience of the Catalan-language radio is relatively recent. In 2008 the two Catalan stations had 792,000 listeners, while the Spanish outlets were listened to by 897,000 people.

The public radio belonging to the Catalan Government, Catalunya Ràdio, led the audience ratings until 2009, when it was surpassed by a private Catalan radio station, RAC1 (property of Grupo Godó, the same group to which *La Vanguardia* belongs), as Table 3 shows. The second position had traditionally been held by the main Spanish radio station, SER (owned by the same media group as that of *El País*: Prisa), but this changed when RAC1 reached the top and pushed SER down to third place. The rest of Spanish stations (the public RNE and the private Onda Cero and Cope) also have a large share of the Catalan audience. Since 2003, another Catalan public station reached the mark of 100,000 listeners: Catalunya Informació, the only 24-hour news outlet on the top list.

Considering data on the whole universe of Spanish radio, Catalunya Ràdio holds 1.3-1.6 % of the overall audience since 1993, but RAC1 started from scratch in 2001 and reached a share of 1.8 % in 2014. In 2014, with 700,000 and 571,000 listeners, respectively, they are the fifth and sixth leading outlets in Spain, after the nation-wide Spanish ones.

These two outlets have led a progressive shift of the talk radio audience of Catalan-language radio from a lower or equal position to one of dominance in the market, as shown in Graph 2.

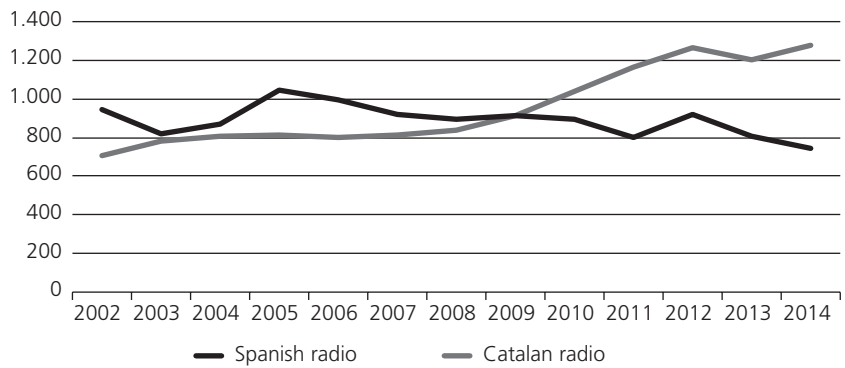
The TV scene in the last decade in Catalonia shows greater variability due to the proliferation of thematic channels, which have jeopardized the generalist outlets.

2002		2008		2014	
1. Cat. Ràdio (C)	511	1. Cat. Ràdio (C)	473	1. RAC1 (C)	697
2. SER (S)	390	2. SER (S)	439	2. Cat. Ràdio (C)	549
3. Onda Cero (S)	261	3. RAC1 (C)	319	3. SER (S)	361
4. RNE (S)	180	4. Cope (S)	138	4. Onda Cero (S)	141
5. Cope (S)	116	5. Onda Cero (S)	132	5. Cat. Informació (C)	137
		6. Cat. Informació (C)	108	6. Cope (S)	135
				7. RNE (S)	107

Table 3. Talk and informative radio stations with over 100,000 listeners in Catalonia
(Thousands of listeners. C indicates Catalan outlets; S indicates Spanish outlets)

Source: Prepared by the author on the basis of data supplied by EGM.

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Graph 2. Talk radio listeners in Catalonia (in thousands), by media systems

Source: Prepared by the author from data supplied by EGM.

While in 2004 the main generalist channels (TV3, TV1, Antena 3, Telecinco) held 83.4% of the total audience according to EGM, in the following years the same outlets had to compete for the audience with Cuatro and La Sexta (two new generalist Spanish TV channels broadcasting since 2005 and 2006, respectively) and 8TV (a new Catalan channel broadcasting for the whole region since 2003), and despite this increase in the number of generalist channels, the joint overall share of all generalist channels dropped to 71.7% in 2014.

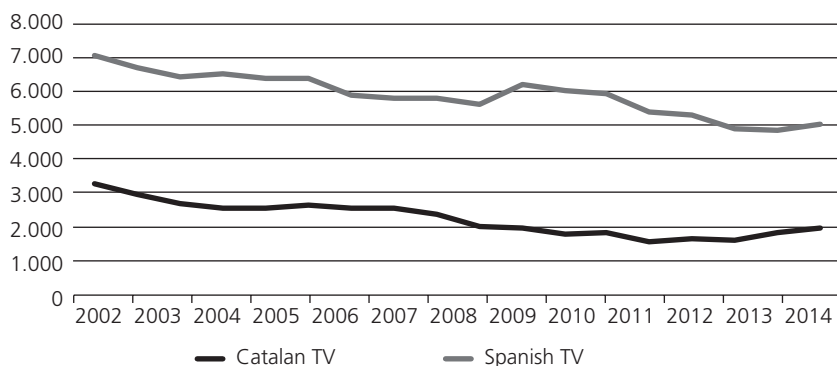
The Spanish channels have always held the greater part of the TV audience in Catalonia (see Table 4), especially since the liberalisation of the market and the introduction of the private channels Telecinco, Antena 3 and Canal+ in 1990,

1997		2007		2014	
1. TV3 (C)	2,433	1. Antena 3 (S)	1,706	1. Antena 3 (S)	1,363
2. Telecinco (S)	2,050	2. Telecinco (S)	1,623	2. Telecinco (S)	1,254
3. Antena 3 (S)	2,030	3. TV3 (C)	1,436	3. TV3 (C)	1,243
4. TVE (S)	1,801	4. TVE (S)	1,231	4. TVE (S)	913
4. Canal 33 (C)	781	5. Cuatro (S)	772	5. La Sexta (S)	643
5. La 2 (S)	771	6. La Sexta (S)	470	6. Cuatro (S)	627
6. Canal + (S)	388	7. La 2 (S)	386	7. 8TV (C)	313
		8. K3 / C33 (C)	261	8. La 2 (S)	220
				9. 3/24 (C)	148

Table 4. TV channels with over 100,000 viewers in Catalonia

(Thousands of listeners. C indicates Catalan outlets; S indicates Spanish outlets)

Source: Prepared by the author on the basis of data supplied by EGM.



Graph 3. Generalist TV viewers in Catalonia (in thousands), by media systems

Source: Prepared by the author from data supplied by EGM.

complementing the public TVE. The Catalan supply has been provided nearly exclusively by the public sector, with TV3 and other channels of its group, Corporació Catalana de Mitjans Audiovisuals (attached to the Catalan Government), such as Canal 33 (or K3 / C33) and 3/24. The incipient private Catalan TV supply is limited to 8TV, which has been broadcasting since 2001 but with scant results. TV3 led the Catalan audience ranking for some years, particularly before 2003. Since then, there is close competition for first place between the Catalan channel, Antena 3, Telecinco and TVE, with variable outcomes each year.

The general trend of the sector may be observed in Graph 3, with a progressive drop of generalist TV and a gap of 3,000,000 to 4,000,000 overall viewers between the Catalan channels and the Spanish ones.

A final perspective of the analysis focuses on a comprehensive picture of the media that are published and broadcast in Catalonia, independently of the sector. As EGM uses the same methodology (asking the interviewees about what newspaper/radio station/TV channel they consumed the day before and presenting the results in terms of absolute daily audience and share of the audiovisual outlets), it eases the homologation of data.

A multimedia ranking has been calculated (see Table 5), comparing the ten most consumed outlets last year and twelve years before. The outcome shows that the four main generalist TV channels (Antena 3, Telecinco, TV3 and TVE) remain at the top of the list although here private outlets have surpassed the public ones and the impact of all four relative to population has clearly diminished (from over 30 % to around 20 % or less). Moreover, secondary public channels (K3 / C33 and La 2) have disappeared from the ranking while new TV channels have entered.

As for the press, the two main newspapers of Barcelona (*El Periódico* and *La Vanguardia*) held the 5th and 7th positions in 2002. Twelve years later, both outlets remain on the list but with different evolutions: *La Vanguardia* has risen one

2002			2014		
1. TV3 (C)	1,897	(35.2)	1. Antena 3 (S)	1,363	(21.7)
2. La 1 (S)	1,806	(33.5)	2. Telecinco (S)	1,254	(20.0)
3. Antena 3 (S)	1,787	(33.2)	3. TV3 (C)	1,243	(19.8)
4. Telecinco (S)	1,758	(32.6)	4. La 1 (S)	913	(14.6)
5. El Periódico (C)	688	(12.8)	5. RAC1 (C)	697	(11.1)
6. La 2 (S)	652	(12.2)	6. La Vanguardia (C)	654	(10.4)
7. La Vanguardia (C)	614	(11.4)	7. La Sexta (S)	643	(10.3)
8. K3 / C33 (C)	570	(10.6)	8. Cuatro (S)	627	(10.0)
9. Catalunya Ràdio (C)	511	(9.5)	9. Catalunya Ràdio (C)	549	(8.8)
10. SER (S)	390	(7.2)	10. El Periódico (C)	485	(7.7)

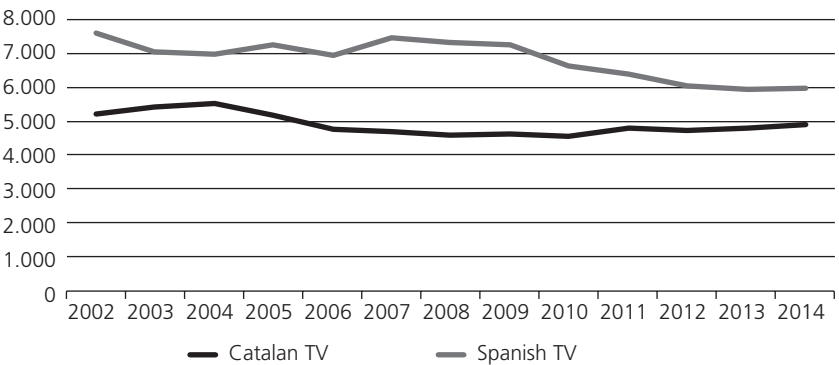
Table 5. Top 10 mainstream media outlets, by audience in Catalonia
(Thousands of viewers/readers/listeners and percentage of population between brackets. C indicates Catalan outlets; S indicates Spanish outlets)

Source: Prepared by the author on the basis of data supplied by EGM.

position and gained some readers, while *El Periódico* has fallen to last place on the top ten due to the drop in its readership.

Lastly, two radio stations hold a place on the ranking: Catalunya Ràdio maintains half a million listeners and 9th place, but the big change is that SER has been ousted from the ranking and RAC1 appears in 5th place, being the most consumed outlet apart from generalist TV.

Once the audience results of all the media categorized by the two media systems have been melted (Graph 4), we find that Spanish outlets have traditionally been dominant in Catalonia in the last twelve years. However, the differential



Graph 4. Mainstream outlet consumers in Catalonia (in thousands), by media systems

Source: Prepared by the author from data supplied by EGM.

between the Spanish and Catalan media audiences has been reduced to half of what it was in 2002 (2,392,000 in 2002 versus 1,093,000 in 2014), as the Spanish media audience has dropped more than 20 % in this period while the Catalan media audience only decreased 6 %. In the last year of the period under consideration, the Catalan outlets held 45 % of the market and the Spanish outlets held 55 %, while twelve years earlier the Catalan system held 41 % and the Spanish system held 59 %.

At this point, it may be concluded that the data evidence a historically consolidated audience of Catalan newspaper. Furthermore, more recently, the Catalan radio has gained a large share of the market. Catalan TV, however, holds a minority position. Nevertheless, in a context of decline of mainstream media in favour of social media and Internet outlets, in overall terms Catalan media have maintained their audience with few losses, due to the weight of radio listeners (at the expense of Spanish stations) and the lower declines of TV viewers and newspaper readers compared to those of the Spanish media. This dissimilar performance of both systems is leading to a convergence of the magnitude of their audiences.

The audience since the Catalan pro-independence process

Based on the EGM data and following the MSD theory, a question is posed: have media audiences shown any change in their behaviour coinciding with the Catalan independence debate, which has produced large demonstrations and uncertainty in society?

Since 2012, the political agenda in Catalonia has been shaken by the irruption of this debate in the social and political arena. The pro-independence movement gained momentum that year out of the blue with a huge demonstration in the streets of Barcelona on the Catalan national day, September 11th. Since then, on every September 11th big demonstrations in favour of independence have been held, with around a million followers counted by the police (Guinjoan, Rodon and Sanjaume, 2013). Besides the marches, since 2012 autumn has also become a typical season for popular mobilization and intense political debate due to elections and other voting processes. Again in 2012 the Catalan president called an early parliamentary election following the September demonstration, with the election taking place in November. In 2015 and 2017, other fall elections were held. And in 2014 and 2017, the Catalan Government and the pro-independence parties and civil organizations managed to hold a non-binding consultation and a referendum on independence, with more than 2 million people participating in each event despite the ban of the Spanish Government. This debate has been called the Catalan Process.

After processing the EGM audience growth data of every TV and radio outlet from the third and last measured term (conducted in October-November) of the last 14 years as statistical units, and distinguishing between two periods (2004-2011 and 2012-2017), some evidence confirms a new trend in behaviour. The type of audiovisual media (TV or radio) and the media system (Catalan or Spanish) have also been considered as possible factors explaining the audience evolution, as we have verified in the case of the rapid rise of the Catalan radio stations in recent years. Accordingly, a multiple linear regression analysis has been carried out, using the audience quarterly growth as the dependent variable and including three explanatory dichotomous variables: whether the units are observed since 2012 (within the social and political mobilization period following the independence debate) or before, whether they are from media belonging to the Catalan system or to the Spanish system, and whether they are from radio stations or from TV channels. Finally, two numerical control variables have been taken into account in the model: the growth of the audience of the same media in the other terms of the year, and the general increase of audience in the rest of Spain, excluding Catalonia.

This model (Table 6) is significant (significance of F-statistic is 0.000) and explains the 27 % variance of the growth (R-squared 0.270). Regarding the influence of the variables, it shows that the audience growth in the rest of the year and the fact of being observed before or since 2012 are significant. Slightly significant is whether the unit belongs to the Catalan system or the Spanish. Results verify that the increase of audience produced since 2012 or before is the variable most influential for growth, followed by the media system. The evolution in the rest of the year is less influential.

Differences in average growth before and after the boom of the pro-independence mobilization are highly significant ($p < 0.01$), especially in the two Catalan radio stations, RAC1 and Catalunya Ràdio (Table 7). Coinciding with the Catalan Process, their audiences have rocketed in the 3rd term since 2012. Less significant but still

	Estimated beta	Standard error	P-value	T-value
(Constant)	-1.004	0.282	0.000 ***	-3.565
Since 2012 vs before 2012	1.136	0.355	0.002 **	3.197
Catalan vs Spanish system	0.727	0.375	0.054 †	1.942
Radio vs TV	0.407	0.347	0.243	1.173
Increase in rest of year	-0.452	0.083	0.000 ***	-5.449
Increase in rest of Spain	0.319	0.197	0.107	1.621

Table 6. Multiple linear regression analysing the audience growth of media outlets in the last term of the year from 2004 until 2017

(†) $p < 0.1$ // (*) $p < 0.05$ // (**) $p < 0.01$ // (***) $p < 0.001$

Source: Prepared by the author from data supplied by EGM.

	Mean 2004-2011	Mean 2012-2017	Diff.	P-value	T-value	Observations (1st/2nd periods)
RAC1	0.20	2.03	1.83	0.006 **	-3.432	14 (8/6)
Catalunya Ràdio	-1.02	1.69	2.71	0.004 **	-4.332	14 (8/6)
SER	0.18	-0.08	-0.26	0.627	0.504	14 (8/6)
Onda Cero	0.02	-0.29	-0.31	0.389	0.898	14 (8/6)
COPE	0.95	0.10	-0.85	0.234	1.290	14 (8/6)
All radio	0.06	0.69	0.63	0.046 *	-2.036	70 (40/30)
TV3	-0.25	2.60	2.85	0.220	-1.323	14 (8/6)
TVE	0.39	-2.30	-2.69	0.089 †	1.871	14 (8/6)
Antena 3	-2.01	-0.02	1.99	0.158	-1.506	14 (8/6)
Telecinco	-1.28	0.90	2.18	0.245	-1.375	11 (8/3)
La Sexta	-1.26	1.75	3.01	0.048 *	-2.313	11 (5/6)
Cuatro	-1.10	1.43	2.53	0.097 †	-2.046	9 (6/3)
All TV	-0.89	0.64	1.53	0.035 *	-2.169	73 (43/30)
Catalan media	0.36	2.11	1.75	0.002 **	-3.337	42 (24/18)
Spanish media	-0.46	0.05	0.51	0.237	-1.192	101 (59/42)
GLOBAL	-0.43	0.67	1.1	0.006 **	-2.824	143 (83/60)

Table 7. T-test comparing the audience average growth of media outlets in the last term of the year from 2004 until 2017

(†) $p < 0.1$ // (*) $p < 0.05$ // (**) $p < 0.01$

Source: Prepared by the author from data supplied by EGM.

important is the evolution of the audience for three Spanish TV channels: La Sexta ($p < 0.05$) and TVE and Cuatro ($p < 0.1$). In the case of the public Spanish television, in this second period its audience decreased more than any other outlet's. On the other hand, the two youngest Spanish private channels have experienced a dramatic increase in terms of audience since 2012. Both radio stations as a whole and TV channels display overall a significant growth ($p < 0.05$), which is more intense for the television channels.

But the most significant variable ($p < 0.01$) which explains this change of behaviour is geographical. Overall, Catalan media increased their audience an average of 1.75 extra points in the last term of the year in the second period. On the other hand, there is no significant difference in the growth of the Spanish outlets in the second period in relation to the first one. Considering all 143 observations of the database, there is a highly significant yearly growth of the outlets (of 1.1 points) in the last term since 2012 with respect to the first period.

Conclusions

Considering the data and the statistical analysis presented here, from the evolution of the audience trends observed in this study it may be deduced that none of the media systems coexisting in Catalonia has a marginal position according to their number of outlets and their audience results and stability. This centrality can be proved by considering the number of outlets (five of the ten top media in terms of audience were Catalan and five were Spanish in both 2002 and 2014), and by considering their stability (neither the Spanish nor the Catalan systems hold less than the 40 % of the audience in the analysed period). So both hold a central position as required in the MSD for a media system to be influential, confirming thus the first hypothesis. The regression analysis, for its part, indicates that the social and political mobilization coincides with a change in the media consumption habits, as the variable being observed since 2012 is significant and the strongest variable in our model for explaining the evolution of the overall audience in the last term of the year; and this has been quantified in a growth mean of 1.1 percentage points of the audience in this period every year. This is the second condition, concerning periods of change and conflict in a society enhancing the influence of media on the audience according to the MSD, and it verifies the second hypothesis.

So according to MSD, it may be concluded that the conditions existing in Catalonia in the analysed period of time favour an influential role of both Catalan and Spanish media with respect to the people, as both systems have a centrality in Catalan society and the political uncertainty has increased the need for information and, thus, the attention of society to the media.

The extension of this analysis to the following years involves more difficult conditions because EGM no longer covers all the main media outlets consumed in Catalonia since 2015 (as explained in the methodological notes). However, future research in the field could be carried out by focusing on causation, which requires different tools than those used in this paper. Causal relationship could be checked by testing the changes in the need for information due to the Catalan Process at an individual level, through experiments, or by analysing the impact of an intense political period on the audience at a macro level, through longitudinal surveys. ■



Notes

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- 12** The EGM sample consisted of 5,288 interviews in Catalonia in 1989; 6,042 in 1999. Two years later it expanded: 6,513 interviews for press and TV, and 11,079 for TV in 2001.
- 13** "Mediaset abandona el EGM". (2015, February 24). *La Vanguardia Digital*. Retrieved from: <<https://www.lavanguardia.com/television/audiencias/20150224/54426477405/mediaset-abandona-egm.html>>.

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