

Measuring the small in the digital landscape

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ABSTRACT

In Catalonia, the smaller media publishing in the Catalan language -usually calling themselves *proximity media* instead of *local media*- is a significant and particularly dynamic sector of the media industry's environment. In a constant struggle to be visible against the backdrop of the state-focused Spanish media measurement systems, different approaches have been tested to portray a more accurate picture of the importance of these media, to increase their advertising revenue, and also to assess the impact of Catalanian media and culture.

This article analyses the effect produced in the audiences of the local media integrated in the Association of Information and Communication Media (*Associació de Mitjans d'Informació i Comunicació*) by the changes observed in the Communication and Culture Barometer published by the Communication and Culture Audiences Foundation (FUNDACC).

The objective of this article is to delineate the challenges that these media have to face to be market-significant from an audience measurement standpoint, and how the media measurement institutions are a key player in this process.

Keywords: audience measurement, audience economics, audience measurement institutions, local media, freecontent media, communicative spaces

INTRODUCTION

Catalonia is one of Spain's seventeen autonomous communities¹ and one of those considered a historical nationality given its common identity organized mainly around the Catalan language. Considered one of the economic engines of Spain, Catalonia has also been the region driving the so-called Catalanian culture and communicative space (Gifreu, Corominas and Abadal, 1991; Gifreu, 2006, 2009, 2014) formed by the territories of Catalonia (also called the Principality of Catalonia, part of it within Spain and another, smaller part, Northern Catalonia, in France), the Valencian Community and the Balearic Islands² This space corresponds 'to the territories included -and internationally recognized- within the scope of the Catalanian linguistic sphere' (Gifreu and Corominas 1991: 24). The concept is an updating of the idea of the Catalanian Countries, arising in the early 20th century (Gifreu and Corominas, 1991: 23) as an autonomous socio-political entity structured around the Catalan language. These territories have an approximate population of fourteen million, around half of that in Catalonia.

Since the Franco regime disappeared and gave way to the democratic transition, the Catalanian communication space has been built mainly on the work of the media in Catalan. Catalonia's public television has played an essential role with their different channels³, but nevertheless private radio channels local press publications in Catalan have also contributed significantly. In the case of national newspapers⁴, the situation was less consistent until the beginning of the century, when four newspapers in Catalan were being published: *Ara*, *El Punt Avui*, *La Vanguardia* and *El Periódico de Catalunya*. The latter two newspapers are published in Spanish, but also translated into Catalan.

In Catalonia, Catalan media must compete with Spanish media, whose headquarters are outside Catalanian territory⁵. Advertising investment in Catalonia in 2016 was €989.9m, representing 22.3 per cent of the total in Spain. About 65 per cent of this investment

(€654.6m) went on non-Catalan media outlets with an audience in Catalonia (*Business Advertising Association 2018*).

As mentioned above, the local press has played a key role in building the cultural space in Catalan (see Alces-Alcalde and Amezaga 2016) thanks to the work of local press associations such as the Catalan Association of Regional Press (ACPC), the Association of Periodical Publications in Catalan (APPEC) and the Association of Information and Communication Media (AMIC, formerly called the Catalanian Association of Free Press). In 2014, these three associations joined forces to form the Federation of Associations of Newspaper, Magazine and Digital Media Publishers with the aim of combining distribution and audience volume in the Catalonian market and sharing other common projects, funded by the Catalanian Government.⁶ However, in 2017 the AMIC left the federation, its work continued by only the ACPC and APPEC. These two entities comprise 202 paid publications in print format and 122 publications in digital format (Yarza 2016). For its own part, in 2016 the AMIC comprised 136 print and 144 digital publications.

The AMIC was created in 1997 to become the business organization representing the free press in Catalonia, with special attention given to local media. As stated on their web page, the organization is made up of ‘295 media outlets, 116 of them free newspapers⁷ with a combined circulation of over 1.5m copies, fifteen of them paid newspapers with a combined circulation of around 60,000 copies and 164 digital media outlets which together exceed 8.5 million visitors or readers monthly’ (Associació Mitjans d’Informació i Comunicació). The association’s aims include the desire to ‘facilitate the planning of advertising.’

The association’s priority on channelling and adding audiences from all of its members is one of its strategic lines of work. In the words of its president Ramon Grau, ‘we act as

a main hub for Catalonia's local media' (AMIC 2017: 16). In this respect, it should be noted that 80 per cent of its newspapers are audited by the Office for Justification of Dissemination (OJD) and by the Office of Free Publications and Distributable Copies (PGD), the two systems for compiling and disseminating statistics in Spain. In addition, in 2012 they promoted the publication of the ranking of digital media in Catalan, which extended the association's scope beyond free media and projected its ambition to become the central organization of local information. The changes to the association's name in 2010 and 2014 were also aimed at framing the organization as representing not only free print newspapers but also all local media in Catalan in any format.

METHODOLOGY

The importance of all of these media in the Catalan media ecosystem as a whole has been heavily influenced by the different systems of audience measurement. The aim of this article is to analyse how changes in the institutional and technical definition of these systems in Catalonia have affected these local media's ratings.

The specific case of the AMIC and the data from the Communication and Culture Barometer will be studied in more detail in the following pages. This association has been one of the most dynamic in the local media sector and has been especially insistent in advocating the need for a dedicated measurement system for both print and digital audiences.

The methodology used to study the impact in the AIMC media of the changes in the Communication and Culture Barometer is the comparison of the audience ratings after the institutional changes in the Communication and Culture Audiences Foundation (FUNDACC), the private foundation responsible for conducting the study. Furthermore, the meetings of the board's minutes and personal communications with the managing

team of the foundation were used to assess the evolution of the institution and its impact on audience ratings.

THE AUDIENCE IN THE TWENTY-FIRST CENTURY

The concept of audience has undergone constant revision in the early twenty-first century both in the academy (Nightingale 2011; Huertas Bailén 2015; Lunt and Vicente-Mariño 2015; Sáez, Sabaté and Peralta 2015; Petit 2017) and in industry (*The New York Times* 2014), following a process initiated at the point when the audience began to have an economic value as an advertising bargaining chip over the last century. This process of individualization, characterized by giving more importance to the time and place of interaction with the content, has intensified with the almost massive introduction of mobile media on both phones and tablets (Ettema and Whitney 1994; Livingston and Lunt 1994, 2012; McQuail 1997; Butsch 2000; Rosen 2006; Sullivan 2013; Carpentier, et al. 2014). Another key element in new definitions of the audience is its participation in the process of creating content and building communities (Huertas Bailén, 2015; Sáez, et al. 2015).

AUDIENCE STUDIES AS MARKET OPERATIONS

Audience studies as market operations are a particular case within the overall research conducted on communication media. Its main characteristics are methodological globalization, its syndicated organization and its commercial value in the advertising market (Kent 1994; Gunter 2000; Jauset 2000; Bertrand and Hughes 2005).

Methodological and technical globalization is one of the guarantees of the data's legitimacy. The different audience measurement bodies are constantly scrutinizing each other to hit upon international benchmarks which help to validate the data obtained. On the other hand, most audience studies are syndicated studies, promoted by state-level media associations that seek consensus and stability as one of their main strategies. This

prioritization of consensus limits the possibility innovative methodologies given that technological changes often entail variations in data, but it is essential for justifying the high cost of such studies. Finally, audience studies provide data that not only deliver strategic information but have market value in setting the asking price of advertising. As a bargaining chip, this value has established the idea of the audience as a unique figure of a state nature with little attention to linguistic and cultural diversity (Napoli 2003, 2007, 2008, 2011).

However, audience fragmentation, the multiplicity of channels and mobility are precipitating a crisis in a model that had proved to be quite effective up until technological digitalisation and the social model that some authors associate with postmodernity. As Green notes, the audience research sector stands at an crossroads: ‘exciting because of all the change and innovation already being pioneered in the sector; worrying because some of the trends in the media business may move faster than the media research business can keep up with’ (Green 2007: 237).

Because of this, as has been explained in other articles, ‘audience measurement systems and the institutions that promote them are strategic agents in defining the media ecosystem they describe, but at the same time configure their diversity’ (Sabaté, 2011:74). From this perspective, audience studies have become regarded as market operations. They are instruments used by communication media, advertising media agencies and institutions and associations of measurement to attach a market value to advertising and thus quantify advertising investment. As a general rule, these studies are conducted at state level, and there is only one metric giving the audience figure for each format: the existence of conflicting data might hinder establishing the price of advertising.

THE RELATIONSHIP BETWEEN AUDIENCE STUDIES IN SPAIN AND CATALONIA

Local and national media have always sought to change audience measurement methodology in Catalonia, as they did not feel they were well represented by the data from Spain's measurement systems. The most influential audience figures in Spain for local media are derived from the General Media Study (EGM) prepared by the Association for the Investigation of Communication Media (AIMC), a joint industry committee made up principally of Madrid-based media and advertising planning agencies (Lamas 2010). In Catalonia a number of different initiatives have been promoted to improve this situation in the communication sector with the support of public institutions, mainly the Catalanian Government. Two strategies were used. The first one was improving Spanish measurement systems. For instance, the Catalanian Radio Association promoted the creation of the General Media Study (EGM) Radio Catalunya, which consisted of financing the inclusion of approximately 12,000 telephone interviews to add to the sampling of the EGM in Catalanian territory.

The second strategy was the creation of separate measurement systems that compete with the Spanish one: the Communication and Culture Barometer was born.

THE COMMUNICATION AND CULTURE BAROMETER AND FUNDACC

In its origins, FUNDACC was defined as a private, plural, neutral and independent foundation specialized in researching audiences for communication media and cultural consumption in Catalan-speaking territories (Cardús 2007; Cardús *et al.* 2007). As we shall see below, the objective of FUNDACC was to give visibility to a whole series of media that were not well represented in the audience data from the state-level measurement systems. FUNDACC aimed to build the best possible instrument for determining the scope of Catalanian communication: the Communication and Culture Barometer.

We can differentiate three stages in the history of FUNDACC⁸, which mark the institution's different actions and the evolution produced in the Barometer of Communication and Culture:

1. The foundational stage (2003-2007), aimed at the technical definition of the barometer and release of the first data on audiences and cultural consumption, as well as achieving scientific, political and commercial legitimacy for the project.
2. The commercial development stage (2008-2010), where it sought to achieve economic viability for the project beyond the economic contributions of the Catalanian, Valencian and Balearic public administrations.
3. The transformation stage (2011-2014), marked by the attempt to ensure the project's survival with the radical change from the Communication and Culture Barometer to the EGM Barometer Catalonia, which led to the agreement with AIMC and finally to the dissolution of FUNDACC at the end of 2014.

THE FOUNDATIONAL STAGE (2003-2007)

Prior to its constitution as a foundation, the initiative's promoters held around a dozen meetings in Barcelona, calling together about two hundred people to define the strategic lines for the foundation's work. The institution, not yet created, was called Fundació Via Fora and its aim was to create 'the conditions for a cultural and communication industry to serve the Catalanian Countries of the future.'⁹

The foundational document of what would later become the foundation Catalanian Space of Culture and Communication (ESCACC) describes the problems that affect the Catalanian communication space and initiated different work sessions that gave rise to the idea of creating a 'Catalonian EGM'. After conducting a thorough preliminary study of the different measurement systems in Spain and comparing it with other international studies, a team of sociologists led by Salvador Cardús started the process of defining a

new instrument: the Communication and Culture Barometer (Cardús *et al.*2007). The study initially detected two matches in all systems analysed: the presence of a study based on surveys and measurement systems connected to state-level structures.

Because of these two factors, the EGM could never respond to the needs of the Catalanian culture and communication space. With this initial approach, the barometer's creators identified 'high-power cultural subspaces that are structured neither by the force of state-level organization nor by the globalization of cultural merchandise and interstate transversal tastes: cultural linguistic spaces.'(Cardús *et al.* 2007: 13) And they add: 'Language is to culture and communication what money is to the market: the instrument of organization *sine qua non*. Therefore, there are cultural and communicative spaces characterized by sharing the same language.'(Cardús *et al.* 2007: 13).

Scientific and institutional legitimacy

Within this first stage, there were three main objectives of the project: achieving scientific legitimacy, achieving political and institutional legitimacy and achieving corporate legitimacy. From 2003 to 2005, the academic team worked to finalise the technical definition of the barometer, and the management team pursued institutional support to obtain the initial public funding needed to create the barometer, as well as gaining support from different business agents in the communication and culture sector.

On 31st March 2005, the first meeting of the Board of Trustees of CaixaForum Barcelona was held, and the Private Communication and Culture Foundation, which would later change its name to the Communication and Culture Audiences Foundation (FUNDACC),¹⁰ was established with the sole objective of creating the barometer. The founders decided to create a foundation separate from the ESCACC foundation to be able to create a space in which all media and institutions connected with the communication and culture sector could feel comfortable.¹¹ In addition to this, they adopted the legal

form of a foundation to facilitate access to public funding. However, the ESCACC maintains a strategic connection with the new foundation: any decision by the Board of Trustees of FUNDACC that could affect its strategic action must obtain their approval. Thus, the first president of FUNDACC was Oriol Soler i Castanys, also president of ESCACC and president of the group Cultura 03. The first FUNDACC trustees were distinguished representatives from the Catalanian scientific, cultural, media and political worlds.

Two elements that would be decisive for the foundation's operation and which are a clear differentiating factor with respect to other models of audience measurement institutions were established in the first FUNDACC statutes: one half plus one of the trustees would always come from the scientific sphere, and two thirds of the Board of Trustees would be needed to modify the statutes. In this way, the intention was explicitly established not to leave management of the foundation exclusively in the hands of the market and to allow for possible methodological conditioning to favour the private interests of a communication company. The financing model would be based on an institutional trustee fee of about €100,000 for corporate trustees and on obtaining public subsidies from the Catalanian Government, the Government of Valencia and the Government of the Balearic Islands as the most representative administrations of the Catalan-speaking territories.

At the second meeting of FUNDACC Board of Trustees on 15th September 2005, Salvador Cardús was appointed as President and Oriol Soler as Vice-president, with the aim of reaffirming the neutral nature of the foundation. Despite the initial consensus within the scientific community and much of the political power of the need for the barometer, many difficulties for the project's incorporation in the 'dominant sectors'¹² of communication began to be detected from the beginning (Communication and Culture Audiences Foundation 2005).

In this first stage, we should make mention of the support from the media agency Media Planning and from Ferran Rodés i Vilà, the managing director of the company at that time. He was one of those responsible for overcoming the initial reluctance of the media agencies and breaking the myth that these companies, the main managers of advertising planning, would not want to use the barometer because they were used to the EGM. However, as discussed below, it was not until the Catalanian Government requested that media agencies use the barometer for planning institutional advertising to be homologized that the planning sector began to participate extensively in the project.

In terms of participation in the technical definition of the project, the project's scientific team always sought the maximum consensus of communication and culture companies, even those most directly opposed to the project. In this respect, Salvador Cardús and his team undertook the work of reviewing the instrument, the questionnaire and the sampling procedure, complemented by the contributions of companies in the sector. The technical committees for radio, television, print media (newspapers and periodicals) and digital media (Internet) were created, and started collecting contributions in the sector. The questionnaire and the sampling were the two major points of debate among the communication companies. The technical committee recommendations incorporated the ideas that the questionnaire had to be flexible enough to be able to pick up the frequent changes in the sector, and the sampling, despite taking into account local and national media, could not ignore the preponderance of the metropolitan areas.

At the second meeting of the Board of Trustees in 2005, the work of the academic team drew to a close. The tool was considered 'refined enough' and it was left in the hands of a Technical Committee derived from the Board of Trustees which had to have "representation from the technicians from the companies in the sector and where there was maximum participation, maximum consensus and maximum capacity for innovation

to adapt the barometer to the demands of the sector” (Communication and Culture Audiences Foundation, 2005).

The bigger media companies’ desire for greater participation in the Board of Trustees, in the understanding that the hefty scientific and academic presence could entail a loss of their control over the barometer, indirectly led to the redefinition of the foundation’s economic management model. The proposal was to ask companies to make their contributions based on the purchase of information obtained from the barometer. This funding system was ‘committed to a barometer that was clearly in service to the sector and quite focused on selling data and reports on audiences and cultural consumption’(Communication and Culture Audiences Foundation 2005). This also separated the incorporation into the Board of Trustees from the sale of data, and allowed for the provision of marketing information to companies and institutions in other sectors. It was a question of moving to ‘a much more commercial financing model, where the trustees would buy the data in accordance with their needs and their possibilities (Communication and Culture Audiences Foundation 2005). The media would pay according to their audience, as they in fact had done in the AIMC model, and the commercial action was expanded beyond the Board of Trustees.

However, companies’ greater participation on the Board of Trustees might have mean the loss of the technical independence the project required. For this reason, two exclusivities are defined in the management of the foundation:

1. The positions of president and vice president would always be occupied by a scientific trustee.
2. Companies would be represented on the Steering Committee and the Technical Committee, but maintaining the majority of scientific trustees, as was also the case for overall composition of the Board of Trustees.

These changes also shaped the organizational structure of the foundation, where there are three levels of trustees: scientific trustees, corporate trustees and institutional trustees. They also conditioned the growth of the Board of Trustees, which would need to incorporate two scientific trustees for each corporate or institutional trustee joining the project.

Business legitimacy

The years 2006 and 2007 were ones of intense activity for FUNDACC, which still sought to establish the project's business legitimacy and work with the companies contracted for release of the first data from the barometer: AC Nielsen, in charge of conducting the interviews, and ODEC, the computing centre responsible for the data treatment.

With reference to business incorporations, the associations for the local press and magazines in Catalan were incorporated in 2006: the Catalanian Association of Regional Press (ACPC), the Catalanian Association of Free Press (ACPG) and the Association of Periodical Publications in Catalanian (APPEC), represented by their respective presidents. These incorporations were quite significant because they showed the commitment to the project made by the media associations whose natural business scope is the Catalanian communication space. However, in 2006 it was concluded that large private communication groups could not be incorporated in the short term. These companies, as we have seen, were satisfied with the EGM data and saw no need to commit to a project which, in their opinion, broke up market unity and might have undermined the dominant position they already held. The Board of Trustees decided to direct its efforts towards incorporating the Catalanian Broadcasting Corporation, at that moment still called the Catalanian Radio and Television Corporation (CCMA, in Catalan), which joined the Board of Trustees at the end of 2006 and subscribed to commercial agreements with other organizations such as the Catalanian News Agency. Another significant

milestone in 2006 was the entry into the project of media agencies Carat and Media Planning, which would facilitate the incorporation of the other advertising planners in subsequent years.

In 2006, the foundation's management structure was also changed to tackle the challenge of producing the first data from the Communication and Culture Barometer with more guarantees.

In 2007 the Flaix Group, the Sàpiens Group, the Public Broadcasting Corporation of the Balearic Islands and the Mindshare media agency would join the business board. The Ministry of the Presidency of the Government of the Balearic Islands would enter the institutional board.

The publication of the first data from the barometer

As explained in the previous paragraphs, one of the first objectives of FUNDACC was to achieve scientific and technical legitimacy. In the hands of Salvador Cardús' team, which managed to integrate academics from seven universities of the Catalan Countries, the scientific integrity of the project was guaranteed. However, to overcome the reluctance of large communication groups, it also needed to have a studio production team with the market's endorsement.

The implementation of any study can be divided into two major blocks: obtaining data -input- based on interviews or other more technological means of gathering information, and processing this data -output- where the statistical treatment of the information obtained is carried out and the databases or reports with the raw data processed are extracted. As we have seen above, in the case of audience studies the methodology is quite standardized internationally and the FUNDACC Board of Trustees sought a market research institute that was recognized for its world-wide work in the field of audiences. The company chosen was AC Nielsen, which conducts audience studies in different

countries and had also been one of the EGM's field institutes. Unlike the EGM model that worked with more than one field institute to verify the quality of the data, FUNDACC opted to work with a single company to reduce the very high production costs.

In the case of the computing centre for processing the output, ODEC was chosen, a company from Gandia, in the Valencian community, which had also been responsible for the treatment of EGM data. The choice of ODEC was largely motivated by the fact that it was also the owner of two of the data processing software applications most widely used in state-level media agencies for planning and research (the applications TOM Micro and Galileo). Moreover, ODEC had the confidence of the entire advertising sector and major advertisers.

Study design

The Communication and Culture Barometer was thus created with the aim of being one of the most accurate studies of audiences and cultural consumption in the world. The characteristics of the study in 2007 were as follows:

- Reference market: twelve million people
- Media map: 1500 existing media
- Study on the consumption of media and cultural consumption (cinema, theatre, books, music, concerts, exhibitions, video games, telephony and Internet)
- Statistical accuracy: *comarcal*, an administrative district in Catalonia similar to a county

Sample design

- Target: the general public aged 14 and over, interviewed at their usual residence, randomly selected using data from the last census
- Total number of interviews: 39,154

- Geographical area: Catalonia, the Valencian Community and the Balearic Islands
- Timing: Continuous fieldwork, with interviews every day of the week and throughout the year. Bi-monthly survey, with interviews spread out over the length of the two months period, each wave being self-representative with quota compliance
- Statistical accuracy: In Catalonia, the data was separated by county, and by districts in the city of Barcelona. In the Valencian Community, different linguistic regions were established. In the Balearic Islands, data was separated by island, with Ibiza and Formentera taken as a single territorial unit
- Sample frequency: To achieve regional statistical accuracy, the frequency of sampling was established that guaranteed the same number of interviews every year and in each region. The initial sample was disproportionately high in Catalonia to obtain sufficient statistical accuracy in less populated areas.

Sampling type

Multistage stratified random sampling was used. The basic sampling unit of the first stage was the census section, a precisely delimited and recognized area, defined by INE (Spanish Institute of Statistics) and IDESCAT (Catalonian Institute of Statistics), from which population data was obtained. These census sections were grouped into municipal strata.

In initial contracts with AC Nielsen, in addition to the main survey of the Communication and Culture Barometer in Catalonia, the Valencian Community and the Balearic Islands, it was planned to carry out a secondary survey of 2500 interviews in the Franja de Ponent, Andorra and Northern Catalonia; a children's survey aimed at children between 4 and 14 that would be conducted every three years with an extension of the sample to 8614

interviews, and a panel of uses and consumption of 2000 people already interviewed in the main survey. However, none of these three extensions and complementary studies were undertaken because of a shortfall in the initially expected funding.

THE COMMERCIAL DEVELOPMENT STAGE (2008-2010)

FUNDACC's commercial development stage began with a review of the initial strategic plan, changes in technical and institutional trustees in the foundation's management as a result of the new commercial orientation and consolidation of the structure and operation of the board that had been created in previous years. Within this stage, 2008 stood out as a first year of change in general direction when the new 2009-2012 strategic plan was approved, and the period from 2009 to 2010 when the new plan was tested, coinciding with institutional support from the Catalanian government for the project. The end of this stage was marked by the change of the executive in the Catalanian Government and the entry of *Convergència i Unió*.¹³ This situation entailed a loss of the institutional legitimacy achieved in the previous stage of the project, and as will be explained in the following sections, it marked a radical redefinition of the structure of the foundation that would have a substantial influence on audience data and the visibility of the Catalanian communication space.

THE TRANSFORMATION STAGE (2011-2014)

As mentioned above, this stage coincided with the change of government in the Catalanian Government. We should also emphasize that this was the moment when the economic crisis was hitting the media hard, which felt the impact of the fall in advertising investment a few years later with respect to the beginning of the crisis. In this stage we can identify three phases:

1. Institutional change phase (2011)
2. Transition phase (2012)

3. Restructuring phase (2013-2014).

The structural change in the Board of Trustees (2011)

In 2011, a change began in FUNDACC structure that would ultimately lead to the agreement with AIMC and the creation of the EGM Barometer. That year, as many as four Board of Trustees meetings were held (instead of the usual two). These were quite difficult times for the foundation and the barometer, always under the pressure of possible closure and facing misgivings from the sector whether or not maintaining the institution was possible. Despite being one of the times in which the Board of Trustees had become better represented, it became clear that many of the alliances to the project were very weak, a product more of political necessity than of business necessity for the data provided by the barometer.

The first meeting of the Board of Trustees, on 5th May 2011, led to the incorporation of the new institutional trustees with the entrance of Josep Martí Blanch, the new secretary of Communication, Jordi Cuminal, general director of Communication, and Ignasi Genovès, general director of Citizen Services and Publicity, Fèlix Riera, director of the Catalanian Institute for the Cultural Industries (ICIC), and Yvonne Griley Martínez, general director of the Secretary of Linguistic Policy of the Department of Culture of the Catalanian Government. On the business board, in spite of the departure of Mediaproducció, the newspaper Ara and the radio station Tele-Taxi were incorporated, which that same year had de-registered with EGM over its disagreement with its audience figures.

With the changes made in 2010, the foundation had achieved a reduction in spending of 30 per cent. A more aggressive reduction was attempted with suppliers but it was not possible because they did not want to give up the contracts that had recently been signed as a result of competitive bidding. The secretary of Communication stated that the

Government did not question the barometer project, in contrast to what had been published in some media, but nevertheless the extremely serious financial situation of the Catalanian Government forced a reduction of 45 per cent in its contribution. This position was also compounded by the director of the ICIC, the other main source of public funding for the foundation. From this meeting, the trustees' request of the general management arose to redo the strategic plan to respond to the radical decrease in public funding, and approval of the budget was postponed.

On 2nd June, the second meeting of FUNDACC Board of Trustees was held and the new foundation budget was presented; as key elements it incorporated deferred spending with suppliers, reducing it to three campaigns per year, and also a reduction in the number of yearly interviews, a further reduction in personnel expenses as well as in fixed structural costs and a deceleration in the repayment of FUNDACC debt, which was primarily held by the Catalanian Institute of Finance (financial institution of a public nature whose sole shareholder is the Catalanian Government). Institutional representatives were satisfied with the efforts made by the foundation, but they called for greater involvement from the private sector in financing. This second meeting led to the creation of a committee to redefine the project commissioned and to better connect the companies in the sector.

Three meetings of the committee were held between June and September, the starting point for the review being the strategic plan document, with the following objectives:

- Improve the identification of market needs and identify new opportunities
- Build an instrument that adds value to the media, agencies, advertisers and public administrations, with the collaboration of the different stakeholders in the market
- Adapt the barometer to the challenges of communication and culture in the 21st century.

The content of the sessions included the review of the 2009-2012 plan (background analysis, review of the strategic plan achievements and the and lessons learned, and identification of market needs), the form of the institutional structure and the type of legal entity, financing, and the review of international models for the presentation of new methodological scenarios. The most significant consequences of the work of this committee in the institutional field, was the decision to reduce FUNDACC Board of Trustees to a maximum of five, and to seek an alliance with the AIMC to integrate the project within the EGM.

This change meant that, starting in 2013, the original barometer data would disappear and the EGM Barometer Catalonia was presented. This new study was built following the model already explained to expand the EGM sample in Catalonia. The impact on audience data of local media was crucial, and, as will be seen in the next point, it caused the disappearance of data from many of the media measured by the barometer.

IMPACT OF THE INSTITUTIONAL CHANGES ON THE MEDIA RATINGS

As a result of FUNDACC changes there were substantial modifications in the instrument that are described below. The EGM Barometer Catalonia was aimed at the Catalanian general public aged 14 and older, just like the previous Barometer of Communication and Culture (2012) and the EGM Catalonia (2012). The main differences between the EGM Catalonia (2012) and the EGM Barometer Catalonia (2013) consisted of the type of interview (face to face or telephone) and the sample distribution.

Survey	EGM Catalonia 2012	EGM Barometer 2013
EGM multimedia (CAPI)	4.500	7.000
EGM radio total	22.600	22.600
Monomedia (CATI)	18.100	15.600
EGM newspapers total	11.000	11.000

Monomedia (CATI)	6.500	4.000
EGM magazines total	7.700	14.000
Monomedia (CAPI)	3.200	7.000

Source: Author's own based on data taken from Sabaté (n.d.)

Table 1: Theoretical sample of EGM Catalonia (2012) and theoretical sample of the EGM Barometer Catalonia (2013)

The most significant difference between the Barometer of Communication and Culture (2012) and the EGM Barometer Catalonia (2013) did not lie in the number of interviews conducted -which increases in the case of radio- but rather in the type of study, which went from being pure multimedia to a fusion of monomedia studies with a central multimedia trunk, through cross-referencing different socio-demographic variables. In addition, the regional sample varied considerably in being considered mainly the distribution of the population in a manner proportional way the territory, which finished the local sampling frequency that was defined in the Communication and Culture Barometer 2012 to represent the audience of small proximity media more favourably. This also meant that there was a 30% reduction in the sample made in municipalities below 10,000 inhabitants.

Another significant variation was that the Communication and Culture Barometer was a study with continuous fieldwork which published data up to six times a year. Interviews were conducted practically every day of the year. This made the data less sensitive to the media's marketing strategies for increasing their audience and made it possible to see what the media behaviour was over periods such as summer and Christmas. In the case of the EGM Barometer Catalonia, the fieldwork was undertaken in three separate campaigns -three times per year- and afterwards processed to obtain audiences (see Table

2). These campaigns, however, coincided with the period of greatest media consumption and in which the media made great efforts to offer new content to consumers. The advertising planning sector argues that this is the best way to optimize advertising investment at the moment in which it is produced most intensively.

Survey methodology	Communication and Culture Barometer (2012)	EGM BarometerCatalonia (2013)
Survey's Scope	Media: Newspapers, supplements, magazines and other periodic publications, radio, television, outdoor media, internet. Cultural industries: Cinema, music, books, theater, scenic arts museums, exhibitions and videogames Language: Linguistic customs	Media: Newspapers, supplements, magazines and other periodic publications, radio, television, outdoor media, internet and cinema Individual and Household Consumption Household Appliances Lifestyles
Methodology	CAPI ¹⁴	CAPI
		CATI
Universe	Catalonian residents 14 years old and more	Catalonian residents 14 years old and more

Sample	18,000 interviews	33,572 interviews 7,100 interviews multimedia (CAPI) +15,617 monomediaràdio (CATI) + 3,890 monomedia newspapers (CATI) + 6,965 monomedia magazines (CATI)
Frequency	6 campaigns	3 campaigns
Data processing	6 campaigns 6 cumulative year data	3 campaigns 3 cumulative year data
Geographical areas	Catalonia (1) Provincial areas (4) Local areas (41)	Catalonia (1) Provincial areas (4) Local areas (8)

Source: Author's own based on data taken from Sabaté (n.d.)

Table 2: *Differences between the Communication and Culture Barometer (2012) and EGM Barometer Catalonia (2013)*

As shown in Table 2, the theoretical sample of the Communication and Culture Barometer (2012) was 18,000 face-to-face multimedia interviews, while the EGM Barometer Catalonia (2013) was 33,572 interviews, out of which 7100 were face-to-face multimedia

interviews complemented with 15,617 monomedia radio interviews, 3890 monomedia print interviews and 6965 monomedia magazine interviews.

The criteria for incorporating a magazine into the EGM were more restrictive than the ones the Communication and Culture Barometer had. In the latter case, FUNDACC tried to incorporate into the media map all of the media present in the Catalonian culture and communication space recognized by the respective associations or by a proven presence in the market.

In the agreement signed between the AIMC and FUNDACC, the specific publications to be measured are set, irrespective of whether they fulfil the general criteria established for the rest of the media. However, the number of publications measured, grouped by the press association to which they belong, was reduced, as shown in Table 3.

	Communication and Culture Barometer (2012)	EGM Barometer (2013)	
Association	Publications with data	Publications in the questionnaire	Publications with data
APPEC	136	55	43
ACPG	91	71	70
ACPC	113	50	47
Total	340	176	160
Reduction of publications	-52,9%		

Source: Author's own based on data taken from Sabaté (n.d.)

Table 3: Number of Association's publications

As can be seen in the previous data, the changes made to the study were quite significant. At FUNDACC it was quantified that the impact of methodological changes in relation to local press audiences and magazines in Catalan could mean a 22 per cent reduction as a whole once the fall resulting from the economic context had been discounted. This decrease was not so prominent in the case of radio or television, beyond circumstantial changes in the leadership of some media and the loss of the odd media outlet too local in scope.

However, the differences between the two studies were so great that comparative series between the data of the Communication and Culture Barometer and the new EGM Barometer Catalonia could not be established. The Catalonian space of culture and communication had a new instrument, with a new methodology that was difficult to compare with the data provided since the end of 2007 by the Communication and Culture Barometer.

Publications	Periodicity	EGM Barometer (2013)	Communi cation and Culture Barometer (2012)	Variation
<i>La Fura</i>	Weekly	69	92	-24,7%
<i>El Tot Mataró i Maresme</i>	Weekly	61	108	-43,4%
<i>Capgrós Mataró Maresme</i>	Weekly	55	99	-44,5%
<i>Mes Ebre</i>	Weekly	51	26	97,0%

Publications	Periodicity	EGM Barometer (2013)	Communi cation and Culture Barometer (2012)	Variation
<i>Cafè Amb Llet</i>	Monthly	49	58	-15,3%
<i>La Bústia Baix Llobregat Nord</i>	Monthly	36	37	-2,3%
<i>Reclam Osona Ripollès</i>	Weekly	36	67	-46,3%
<i>Tot Sant Cugat</i>	Weekly	36	53	-32,4%
<i>La Clau</i>	Weekly	33	51	-35,2%
<i>Panxing Pirineus</i>	Quadrimestral	32	45	-29,1%
<i>El Cargol Mag. Penedès</i>	Weekly	29	40	-27,5%
<i>CopD'Ull</i>	Monthly	25	36	-31,5%
<i>RevistaMes</i>	Weekly	24	46	-47,4%
<i>NotíciesTgn</i>	Weekly	23	50	-53,7%
<i>L'enllaç dels Anoiencs</i>	Weekly	22	39	-43,9%
<i>Comarques de Ponent Pir.</i>	Bimonthly	21	45	-53,6%
<i>Butxaca</i>	Monthly	19	24	-21,4%
<i>La Borrufa</i>	Monthly	19	31	-38,0%
<i>Panxing Tot Berguedà</i>	Monthly	19	25	-23,3%
<i>L'ham</i>	Monthly	18	21	-15,4%
<i>Panxing Tot Cerdanya</i>	Monthly	18	24	-25,6%
<i>Panxing Maresme</i>	Monthly	17	15	11,8%
<i>Diari de Rubí</i>	Weekly	16	25	-36,8%

Publications	Periodicity	EGM Barometer (2013)	Communi cation and Culture Barometer (2012)	Variation
<i>El Tot Badalona</i>	Weekly	16	33	-51,6%
<i>La Ciutat de Tarragona</i>	Bimonthly	15	24	-37,3%
<i>Viu el Prat</i>	Monthly	15	16	-3,4%
<i>Els Colors Pla L'Estany</i>	Monthly	14	20	-29,5%
<i>Mollet a Ma</i>	Weekly	13	24	-44,8%
<i>Revista de Ripollet</i>	Weekly	13	14	-7,5%
<i>Viu Cornella</i>	Monthly	13	10	33,2%
<i>El Nou</i>	Monthly	12	14	-16,9%
<i>Freqüència</i>	Monthly	12	11	5,6%
<i>Reclam Cerdanya-Alt Urgell</i>	Monthly	12	18	-33,1%
<i>Viu L'Hospitalet</i>	Month	12	14	-14,3%
<i>Contrapunt</i>	Weekly	10	17	-41,9%
<i>Groc</i>	Bimonthly	10	17	-41,2%

Source: Author's own based on data taken from Sabaté (n.d.)

Table 4: Audience of the ACPG 2012-2013

Table 4 shows how most of the association's media register a fall in their audience data, with the only exception being the media located in the most populated areas of Catalonia, which behaved better as a result of the new sampling distribution. In addition, as can be

seen in Table 5, the problem was accentuated because many of the publications were no longer visible with the new measurement system.

Publications	Periodicity	EGM Barometer (2013)	Communication and Culture Barometer (2012)	Variation
<i>La Guia de Reus</i>	Monthly	9	23	-60,2%
<i>La Marina</i>	Monthly	9	8	9,8%
<i>Tot Cerdanyola</i>	Weekly	9	30	-69,6%
<i>Tribuna Maresme</i>	Monthly	9	17	-48,5%
<i>Diari de Badalona</i>	Weekly	8	13	-38,4%
<i>Línia Vallès</i>	Weekly	8	24	-67,2%
<i>El Diari del Valles</i>	Weekly	7		-
<i>Línia Les Corts</i>	Monthly	7	4	80,9%
<i>Línia Sants</i>	Bimonthly	7	14	-50,1%
<i>Cerdanyola al Dia</i>	Weekly	6	13	-52,0%
<i>El Pergamí</i>	Monthly	6	14	-57,8%
<i>La Vall D'Horta i Guin.</i>	Monthly	6	6	1,5%
<i>La Vila</i>	Bimonthly	6	25	-76,4%
<i>Llobregat Motor</i>	Monthly	6	7	-9,8%
<i>Mou-te</i>	Monthly	6	15	-58,8%
<i>Natura i Aventura</i>	Monthly	6	33	-81,7%

Publications	Periodicity	EGM Barometer (2013)	Communication and Culture Barometer (2012)	Variation
<i>El Mirador Pla L'Estany</i>	Monthly	5	12	-59,6%

Source: Author's own based on data taken from Sabaté (n.d.)

Table 5: Non-visible publications in the EGM Barometer

CONCLUSIONS

As commercial transactions, audience measurement systems are neither disinterested nor passive actors in the value chain of the business of communication, and they determine how a media ecosystem is defined. Changes in the institutions responsible of media audience measurements have economic, cultural and political consequences. As explained in this article, the impact on the local media audiences could lead to a significant loss of audience or even to their disappearance entirely from the ratings.

From an economic perspective, this situation impacts the market share of local media, and their advertising revenue. Also, it affects the public subsidies that these media receive because they mainly depend on their audience performance.

The main effect from a cultural standpoint is the inability to assess the impact of media in Catalan. Therefore, the language, one of the crucial items to define a communicative and cultural space, also disappears or its effect is underrepresented in the data obtained. Another problem that arises from the disappearance of the Barometer is the loss of transparency of the Catalanian media system (Casero 2009). Is no longer possible to measure the reach of the Catalanian communicative and cultural space.

In terms of the political impact of the changes described, two elements can be identified.

First, the Catalanian Government has little data available to understand and improve its policies regarding media and communication. Second, the closing of local media due to the lack of advertising revenue has consequences for pluralism and democracy.

In the situation of permanent fragility, the Catalanian communicative space finds itself in (Gifreu 2009), the experience of FUNDACC and the Barometer of Communication and Culture should serve to define the future measurement systems and their control mechanisms, systems that will have to maintain the difficult balance between the costs of production, the usefulness of the data and the legitimate commercial interests of the media, without overlooking the need to properly represent audience behaviour. Moreover, as new forms of measurement emerge related to the use of Big Data and the algorithms used (Petit 2017), new international players will have a key role in the definition of communicative and cultural spaces.

Indeed, besides adequately representing the richness of a media ecosystem with local media, future systems must find the balance between the accuracy of the data obtained and the economic effort necessary to achieve it. The main problem is this diversity of situations and formats, this communicative ecosystem where analogue and digital media coexist, but where, at the moment, only the former have a defined business model, although it enables the market of the latter to be sustained.

On the other hand, without public institutional support, it would not be possible to maintain a measurement system which, through the unique logic of the market, tends to disregard diversity (Napoli 2008). Big media companies will always support whichever market strategy is more useful to their commercial interests.

The technologies and methodologies for measuring new audiences are available. Efforts must be made to ensure that the new systems consider not only the variety of media and

channels, but also cultural diversity and proximity - systems that are as respectful as possible with the audiences they seek to measure.

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¹There are also the autonomous cities of Ceuta and Melilla.

²In addition to this historical-administrative division, different variants of Catalan have also been preserved in the strip of the autonomous community of Aragon bordering Catalonia, the city of Alghero in Sardinia and the Carxe area, located in the Spanish autonomous community of Murcia. Catalan is also spoken in the state of Andorra.

³Mainly the channels of the Catalan Broadcasting Corporation (CCMA), but also although to a lesser extent the second channel of the Spanish state public television.

⁴The term “national” is used to refer to the territory of Catalonia and the term “state” to refer to the territory of Spain.

⁵To get a complete description of the Spanish media system see Llorens 2003 and Llorens 2010. See also Zabaleta et al. n.d.

⁶The Generalitat de Catalunya is the name of the government of the autonomous community. Traditionally, it has developed many public policies to strengthen the Catalan communication

space, funding media in Catalan and supporting the creation of structural projects for the development of the media environment.

⁷The terms ‘free press’, ‘free newspapers’, ‘free magazines’ and ‘free media’ are used to describe the media outlets with a business model based only on advertising.

⁸ This part of the article is based on the unpublished thesis ‘Audience studies and communication spaces. Fundacc and the visibility of the Catalan communicative space: from the Barometer of Communication and Culture to the EGM Barometer Catalonia. The case of the proximity press and the magazines in Catalan (2005-2014)’ (Sabaté, no date)

⁹ Extract from the founding document of the institution.

¹⁰In Terrassa there was a foundation called Foundation for Culture and Communication. The registry of foundations was unable to accept the name initially proposed, due to the similarity of the names. Faced with this problem, the name was changed to Communication and Culture Audiences Foundation, which could be simplified with the acronym FUNDACC.

¹¹ The actions of the ESCACC foundation to create instruments that made growth in the Catalan space of communication possible were always viewed suspiciously by the large communication groups, which were essential for the economic viability of the barometer.

¹²The major communication groups such as Godó, Zeta and Planeta, as well as other groups with more weight in local communication, were the great opponents of the project in this first phase.

¹³In the elections of November 2010, a new parliamentary majority headed by *Convergència i Unió* was elected, winding up with two tripartite governments formed by *Esquerra*, *Partit dels Socialistes de Catalunya* and *Iniciativa-Verds*.

¹⁴CAPI: Computer Assisted Personal Interviewing. CATI Computer Assisted Telephone Interviewing.