

The Impact of Audience Measurement Institutions on Local Media. Study of the Catalan Case

L'impacte de les institucions de mesurament d'audiències en els mitjans locals. Estudi del cas català

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This paper describes the changes in audience data concerning newspapers and magazines that are part of the Catalan Association of Local Press —ACPC—, resulting from the transformation of the Communication and Culture Barometer into the EGM Catalan Barometer. These two studies were prepared by the Communication and Culture Audiences Foundation —FUNDACC—, a non-profit organisation whose management was largely controlled by a scientific board, their primary purpose being to provide audience and cultural consumption data in Catalan-speaking territories, uninfluenced by communication companies' interests. FUNDACC's objective was to provide an alternative to the data provided by the Association for Media Research —AIMC— and the EGM General Media Study—, believed to be subject to the control of media groups with state-wide business interests. This methodological transition resulted in the invisibility of many of the publications that constitute the fabric

Aquest article descriu els canvis en les dades d'audiència de les revistes que formaven part de l'Associació Catalana de la Premsa Comarcal (ACPC), com a conseqüència de la transformació del Baròmetre de la Comunicació i la Cultura en l'EGM Baròmetre Catalunya. Aquests dos estudis eren elaborats per la Fundació Audiències de la Comunicació i la Cultura (FUNDACC), una institució sense ànim de lucre amb una direcció controlada majoritàriament per un patronat científic, que tenia com a objectiu principal oferir dades d'audiència i de consums culturals dels territoris de parla catalana, independents dels interessos particulars de les empreses de comunicació. L'objectiu de FUNDACC era presentar una alternativa a les dades aportades per l'Asociación para la Investigación de Medios de Comunicación (AIMC) i l'Estudio General de Medios (EGM), que es creien sotmeses al control dels grups de comunicació amb interessos de negoci d'abast estatal. El teixit de mitjans locals als territoris de

of local media in the Catalan-speaking territories and it considerably affected its results. The purpose of this paper is to describe the impact of institutional and methodological factors in audience measurement on the transformation of a communication space.

Key words: *audience measurement, audience measurement institutions, audience economics, media systems, local media.*

parla catalana es va veure molt afectat per aquesta transició metodològica, que va provocar la invisibilització de moltes de les capçaleres que en formaven part. L'objectiu d'aquest article és explicar quin és l'impacte dels factors institucionals i metodològics del mesurament de les audiències en la transformació d'un espai de comunicació.

Paraules clau: *mesurament d'audiències, institucions de mesurament d'audiències, economia de l'audiència, sistemes mediàtics, mitjans locals.*

Audience data has been the key indicator in evaluating media performance from the second half of the 20th century to the beginning of the 21st. Audience measurement institutions are one of the key players in evaluating the success or failure of business projects in this sector, however, little has been studied about how their organization can influence the studies they themselves conduct (Napoli, 2003, 2008, 2011). The presence of an audience measurement institution with a particular organizational structure conditions the media audience data that it gathers, and because of this, the reported visibility of a communication space (Napoli, 2007). We should also take into consideration that methodological changes in the measuring instruments which in turn cause audience data variations are consequences of changes in financing, the legal form and/or the governing bodies of the measurement institution, which condition technical management.

In Catalonia, the creation, transformation and, finally, disappearance of the Communication and Culture Barometer, prepared by the Audiences of Communication and Culture Foundation (FUNDACC) from 2007 to 2014, have been fundamental. Other papers have described the importance of the Communication and Culture Barometer and measurement systems in defining the culture and communication space in Catalonia (Cardús, 2007; Cardús *et al.*, 2007; Sabaté, 2011, 2015). The impact on the free local press of the disappearance of the Communication and Culture Barometer and its transformation into the EGM Barometer Catalonia has also been discussed in depth (Sabaté and Micó, 2019).

This article proposes that audience measurement institutions should be considered as active and decisive agents in the construction of communication and culture spaces. The communications industry has traditionally viewed them as

neutral and independent organisations, merely observers of market developments. We will show that commercial and/or political changes in the structure of the measuring institutions are the direct and principal mechanisms responsible for the variations in the audience data.

METHODOLOGY

Throughout this paper, this effect was illustrated by analysing the changes in the reported audience data of local and regional paid-for written media, mainly magazines, that were part of the Catalanian Association of the Regional Press (ACPC) at the time of the transformation of the Communication and Culture Barometer.

We evaluated briefly how the concept of audience has been transformed, and the impact that being a commercial undertaking subject to market forces had on its measurement.

Secondly, we describe the main elements that constitute the Catalanian culture and communication space, and the role of the proximity press in its construction. The institutional and methodological changes made at FUNDACC and the Communication and Culture Barometer is then analysed.

Finally, the evolution of the ACPC audience data was scrutinised as a result of the transformations described in the previous points.

The basis of the analysis was comparing the association media audience data, published statistics, and other data obtained from the measuring institutions internal technical documents. An analysis was also made of the minutes of the meetings of the foundation's Board of Trustees, the communications of its management team members and some personal communications with the technical directors of the project.

THE ECONOMIC VALUE OF AUDIENCE

Of all the key concepts associated with mass communication research, one that has undergone constant and dynamic revision since the turn of the century, is that of the audience, even if from a strictly academic perspective (Nightingale, 2011; Huertas-Bailén, 2015; Lunt and Vicente-Mariño, 2015; Sáez, Sabaté and Peralta, 2015; Petit, 2017) as well as from the communication industry perspective (The New York Times, 2014). The economic value of audience has been redefined based on the phenomena of hyper-segmentation and the temporal and spatial relocation of audiences, as a result of the widespread use of mobile devices (Ettema and Whitney, 1994; Livingston and Lunt, 2012; McQuail, 1997; Butsch, 2000; Rosen, 2006; Sullivan, 2013; Carpentier, Schrøder and Hallett, 2014). The ability to generate content and transform audiences into communities (Huertas-Bailén, 2015; Sáez, Sabaté and Peralta, 2015) has also been instrumental in understanding how the processes of self-communication have transformed what Castells calls "social communication" (Castells, 2009: 87-88).

The commercial value attached to audience has led to the appearance of particular audience surveys that we can define as “market operations” (Lamas, 2004), whose main features are the international standardization of methodology, syndicated financing of production, and commercialisation of state-owned advertising markets (Kent, 1994; Gunter, 2000; Jauset-Berrocal, 2000, 2008; Bertrand and Hughes, 2005). These characteristics constrain audience surveys to be market operations (a) to certify their global legitimacy based on the observance of shared technical criteria; (b) privilege the consensus and methodological stability of the data through the syndication of studies, to the detriment of methodological innovation which may cause variations, but which is essential to justify their high cost, and (c) they get converted into a single currency of exchange to set the price of advertising.

The latter particularity is crucial in understanding the market value of these studies and because as a general rule, these studies are conducted at the 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” (Sabaté and Micó, 2019: 82).

THE CATALONIAN COMMUNICATION SPACE AND THE LOCAL PRESS

The media is the key element in the construction of so-called culture and communication spaces (Gifreu and Corominas, 1991; Gifreu, 2006, 2009, 2014). In the Catalan case, this space would be made up of territories included—and internationally recognized—within the scope of the Catalan linguistic sphere” (Gifreu and Corominas, 1991: 24). Politically, at present this space would be formed mainly by the autonomous communities of Catalonia, Valencia and the Islands within the Spanish state, as well as the area of Northern Catalonia located within the French state.¹ With a population of approximately fourteen million inhabitants, half of them in Catalonia, Gifreu and Corominas update this concept with the idea of Catalan Countries as a political subject organized around the Catalan language (Gifreu and Corominas, 1991: 23). This socio-cultural space is part of the political subdivision of Spain that the Autonomous Communities constitute, defined in Article 143 of the Spanish Constitution as “the neighbouring provinces with common historical, cultural and economic characteristics, the island territories and the provinces with historical regional entity” (Agencia Estatal Boletín Oficial del Estado, 1978: 41). These territorial units have a self-governance capacity defined in accordance with their own legislative frameworks, always within the general framework of the Constitution. Spain currently comprises seventeen

1 We should also include other territories such as Andorra, the western part of the autonomous community of Aragon, the Carxe in the autonomous community of Murcia and Alghero.

autonomous communities and two cities —Ceuta and Melilla— with autonomy status (Dirección General de Gobernanza Pública, 2020).

The democratic transition in Spain allowed the development of this socio-cultural space, totally disarticulated by Franco's censorship, thanks to the recovery of the Catalan media. The backbone of Catalan regional television and public radio is crucial,² but the consolidation of this space would not have been possible without the contribution of private radio stations and the local press. In the case of national subscription newspapers,³ their contribution has not been so homogeneous since the democratic recovery as a result of the varying proportion of use of Catalan in their publications. Since the beginning of the century, the situation has been consolidated with the foundation of four newspapers —*Diari Ara*, *El Punt Avui*, *La Vanguardia* i *El Periódico de Catalunya*— as published both in Spanish and translated into Catalan. The Catalan media have had to compete with the Spanish media (Llorens, 2003, 2010; Zabaleta *et al.*, 2010), which are headquartered mainly outside Catalonia, for a slice of the advertising cake in Catalonia that in 2016 accounted for 23.3 percent of the total in Spain. Of the total revenue, 65.5 per cent was taken up by non-Catalan media with an audience in Catalonia (Business Advertising Association, 2018).

The local press has been one of the key elements (Alces-Alcalde and Ameza-ga, 2016) in this task of media construction of reality (Berger and Luckmann, 1996, 1997). For the most part, local communication in the field of the written press has been developed thanks to the energising efforts of the different media associations such as the Catalan Association of Local Press (ACPC), the Media Association of Information and Communication (AMIC, formerly known as the Catalan Association of Free Publications) and the Association of News Publications in Catalan (APPEC). These three associations came together in 2014 in the Federation of Publishers, Magazines and Digital Media Publishers Association, with the aim of further integrating the various initiatives that these media were undertaking to improve synergies in their business models. However, this association was forced on them, according to some of those involved, a little against their nature, mainly by the Government of the Generalitat de Catalunya. In 2017, due to the different business interests and priorities of the associations, AMIC left the federation. This meant that 136 print media and 144 digital publications were no longer part of a project that continued only with the ACPC and APPEC, which comprised 202 paper and 122 digital publications (Yarza, 2016).

The ACPC was the local press association leader with the greatest number of publications ascribed at the time of the split. Founded in the early 1980's, it represented the interests of the local and regional subscription press in Catalan. Al-

2 Here we specifically refer to the work done by the Catalan Broadcasting Corporation channels, although at the same time emphasising the very substantial activity on local radio and television and by their associations, as well as the Spanish public television second channel.

3 The concept "national" is used to refer to the territory of Catalonia and the concept "state" to refer to Spain.

though we can find newspapers and magazines with the same periodicity as the AMIC ones, the fundamental difference is in their business models, which is not based solely on advertising. As stated on its website, the goals of the association are to defend the interests of its associates and the proximity press as a whole, to promote initiatives for their furtherance, to foster their joint and public presence, and to create services and support infrastructure (Catalonian Regional Press Association, 2020).

One of the difficulties local and regional media have encountered in securing advertising revenue from big advertisers is their lack of state-of-the-art audience measurement systems. The ACPC media, in particular, saw how the Barometer transformation substantially modified its quantitative presence in the Catalanian market.

THE BIRTH OF FUNDACC AND THE COMMUNICATION AND CULTURE BAROMETER

The communication and culture industry in Catalonia, mainly the one that operates in the national, regional and local fields, had always expressed doubts regarding the methodology used by the AIMC, the joint industry committee comprising state-owned media and major media planning agencies (Lamas, 2004). The data provided by the EGM provided a quite blinkered view of the county and local media. However, the local media perceived that the costs of being included in the study were too high for the return on expenditure.

To improve this situation, two different strategies had been followed, which always had the institutional and economic support of the Government of the Generalitat de Catalunya:

1. Improve existing measurement systems. This was the case with the enlargement of the EGM sample in Catalonia in the case of the radio promoted by the Catalanian Radio Association;
2. Create their own audience measurement systems.

This second strategy was accomplished by the creation of FUNDACC and obtaining the first data from the Communication and Culture Barometer.

FUNDACC is defined in its constitution as a private, plural, neutral and independent foundation specializing in research into media audiences and cultural consumption in the Catalan-speaking territories (Cardús, 2007; Cardús *et al.*, 2007). The foundation always gave top priority to a scientifically-sound measuring instrument, placing the needs of the most powerful players in the market in the background. It was hoped that in this way the small local and regional media would be appropriately properly perceived. This guiding principle marked the birth of the Communication and Culture Barometer.

The history of FUNDACC can be depicted in three stages (Sabaté and Micó, 2019), which condition the different actions of the institution and the evolution produced in the Communication and Culture Barometer:

1. The founding stage (2003-2007), aimed at the technical definition of the Barometer and the production of the first audience and cultural consumption statistics, as well as attaining the scientific, political and commercial legitimacy of the project.
2. The commercial development stage (2008-2010), where the intention was to achieve economic viability for the project, beyond the financial contributions of the various public administrations that participated in it.
3. The transformation stage (2011-2014), which was marked by the attempt to guarantee the survival of the project with the radical change of the Communication and Culture Barometer and the EGM Barometer Catalunya, that the agreement with the AIMC triggered, and finally, the dissolution of FUNDACC at the end of 2014.

We will focus on the elements that characterise this third stage, where the fundamental structural changes that made the emergence of the EGM Barometer possible, and which led to the new vision of the Catalan communication space. This stage also coincided with a change of government on the Generalitat de Catalunya front, which set new priorities in reducing public spending, and coincided with the peak of the economic crisis that began in 2008. This crisis also triggered a precipitous fall in advertising expenditure. Within this third stage, three phases could be identified:

1. Institutional change phase (2011): the board departs from its initial structure and was reduced to five trustees. These were quite difficult times for the Foundation, always under the threat of a possible dissolution, despite being one of the times when the Board of Trustees had achieved maximum business representation. The new strategic plan of the foundation was defined in this phase.
2. Transitional phase (2012). This was the year that the new Board of Trustees chose a transformation scenario that agreement with the AIMC triggered. The idea was to be able to save the foundation and its original goals as much as possible, even if the study lost all its initial methodological power. The technical and political difficulties of integrating the Barometer into the EGM —the association had been against this model in the years before the study was created— led to the option of enlarging the EGM sample, which was already being deployed for radio. This particular solution was considered less traumatic from the market acceptance perspective. This year was conspicuous for the negotiations with the AIMC. The economic situation of the association was also affected by the crisis in the sector as a whole.

Within the framework of this proposal, FUNDACC would become a member of the AIMC, with a voice and a vote on behalf of the Catalonian proximity press within the entity's board of directors. This three-year agreement, with a financial consideration of approximately five hundred thousand Euros, allowed a boost in the multimedia interviews to be car-

ried out under the EGM Barometer brand in Catalonia for radio,⁴ and monomedia ones for magazines. The AIMC could decide which institute would carry out the fieldwork in Catalonia, although at the request of FUNDACC, it was promised that in a hypothetical scenario of equal price per interview, the institute of choice would be TNS, the one responsible for the Barometer fieldwork at that time.

At the end of 2012, an agreement with the AIMC was signed that would take effect from January 2013 under the EGM Barometer Catalonia name. This agreement, as it would subsequently become apparent, entailed an increase in the number of multimedia interviews in Catalonia and also the magazine's monomedia interviews; the incorporation of the Catalanian local and regional journals and periodical publications into the study that had been agreed with the three main sectorial associations (ACPC, APPEC and ACPG); the visibility of support for the language; and the AIMC and FUNDACC's joint definition of the new sample from a technical standpoint.

3. Conversion phase (2013-2014). In this phase, the Foundation adapted to the new relationship with the AIMC and began the clear differentiation of its projects: the EGM Barometer Catalonia, conducted by both the AIMC and FUNDACC, which would measure the Catalanian media audiences, and the Culture Barometer, prepared only by FUNDACC, which would measure the cultural consumption of the population at large in the same territory. The Communication and Culture Barometer—hereinafter referred to as the 2012 Communication and Culture Barometer—disappeared definitively. This solution was aimed at ensuring that FUNDACC could continue to analyse cultural consumption in a differentiated project, as the EGM did not go into depth in these aspects in its evaluation.

THE TECHNICAL TRANSFORMATION OF THE COMMUNICATION AND CULTURE BAROMETER INTO THE EGM BAROMETER

The strategy to construct the EGM Barometer Catalunya that was followed was the same as that of the radio in Catalonia, with the creation of the EGM Ràdio XXI, promoted by the Catalanian Radio Association, by funding an enlargement of the EGM radio monomedia study sample.

The changes in this system triggered various modifications to the methodology used to obtain the audience data regarding the Communication and Culture Barometer:

⁴ The agreement also reduced the Generalitat and the Catalan Radio Association's expenditure in carrying out the EGM Ràdio Catalunya, which changed to also be financed under the FUNDACC – AIMC agreement.

1. Slight reduction in sample size;
2. Distribution of the sample according to criteria proportional to population distribution throughout the territory, with no local or regional categorisation; change from a true multimedia study conducted in person with continuous fieldwork, into a pseudo-multimedia one, constructed by merging monomedia studies into three campaigns per year. The difference is that, in the former case, the study was a single long multimedia questionnaire conducted in person. The second study was a pseudo-multimedia construct: the statistical integration of a core multimedia questionnaire (in person) and other monomedia questionnaires (by telephone or in person);
3. Variation in the number of interviews conducted in person or by telephone;
4. Decrease in the number of publications sampled.

In addition, the FUNDACC Board of Trustees agreed to prioritize obtaining audience data from media that did not have an alternative system of market-agreed measurement (magazines, newspapers and radios).⁵

Table 1. Differences Between the Communication and Culture Barometer (2012), produced by FUNDACC, and EGM Barometer Catalonia (2013), produced by AIMC and FUNDACC

	FUNDACC	AIMC - FUNDACC
Survey methodology	Communication and Culture Barometer (2012)	EGM Barometer Catalonia (2013)
Survey scope:	Average: - Newspapers, supplements, magazines and other periodic publications, radio, television, outdoor media, Internet Cultural industries: - Cinema, music, books, theatre, scenic arts museums, exhibitions and videogames - Language - Linguistic customs	Average: - Newspapers, supplements, magazines and other periodic publications, radio, television, outdoor media, Internet and cinema Individual and household consumption Household appliances Lifestyles
Methodology:	CAPI	CAPI <hr/> CATI

⁵ Kantar Media’s audience measurement is the consensus source of television audience data, including for local TV. However, this data could also be obtained using the EGM Barometer Catalunya.

	FUNDACC	AIMC - FUNDACC
Target:	Catalonian residents 14 years of age and older	Catalonian residents 14 years of age and older
Sample size:	18,000 interviews ⁶	33,572 interviews 7,100 multimedia interviews (CAPI) +15,617 monomedia radio (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 compilation.

The EGM Barometer went on to adopt the same campaign-like fieldwork as the EGM traditionally deployed. This methodology was followed to adapt the study to the periods of highest media consumption and encourage advertising expenditure, but left certain times of the year devoid of data (coinciding with vacation periods). In addition, it also reduced project costs.

The most significant difference between the 2012 Communication and Culture Barometer and the 2013 EGM Barometer Catalonia is not in the number of interviews conducted—which in the case of radio increased—but rather in the type of study undertaken, which goes from pure multimedia to a fusion of monomedia studies with a central multimedia trunk, by means of comparing different sociodemographic variables. In addition, as can be seen in the distribution table of the theoretical sample (table 2), the county sample varies considerably, mainly as regards the distribution of the population in proportion to the territory as a whole, which causes loss of sampled population. The consolidation is by county as was defined in the 2012 Communication and Culture Barometer to better depict the local media audience.

⁶ The sample size of the Communication and Culture Barometer had been steadily declining since 2007 in an attempt to reduce project costs and adapt itself to the reduction or disappearance of public funding. For example, the withdrawal of the Balearic Government grant.

Table 2. Comparison of the Regional Distribution of the Sample Between the 2013 EGM Barometer (AIMC - FUNDACC) and the 2012 Barometer (FUNDACC)

County			BAROMETER		EGM - BAROMETER			
	Population (000)	Population %	Sample Size	Sample %	Sample Size	Sample %	Variation Interviews	Variation %
TOTAL CATALONIA	6,439	100	18,623	100	14,006	100	-4,617	-24.8%
Alt Camp	38	0.6	251	1.3	78	0.6	-173	-68.9%
Alt Empordà	119	1.9	484	2.6	243	1.7	-241	-49.8%
Alt Penedès	88	1.4	398	2.1	172	1,2	-226	-56.8%
Alt Urgell	19	0.3	146	0.8	44	0.3	-102	-69.9%
Alta Ribagorça	4	0.1	97	0.5	45	0.3	-52	-53.6%
Anoia	99	1.5	386	2.1	175	1,2	-211	-54.7%
Bages	158	2.5	578	3.1	369	2.6	-209	-36.2%
Baix Camp	161	2.5	597	3.2	343	2.4	-254	-42.5%
Baix Ebre	71	1,1	340	1.8	134	1.0	-206	-60.6%
Baix Empordà	113	1.8	461	2.5	215	1.5	-246	-53.4%
Baix Llobregat	675	10.5	1374	7.4	1480	10.6	106	7.7%
Baix Penedès	85	1.3	389	2.1	153	1,1	-236	-60.7%
Barcelonès	1974	30.7	3373	18,1	4490	32.1	1117	33.1%
Berguedà	37	0.6	239	1.3	65	0.5	-174	-72.8%
Cerdanya	16	0.3	139	0.7	44	0.3	-95	-68.3%
Conca de Barberà	18	0.3	139	0.7	44	0.3	-95	-68.3%
Garraf	124	1.9	466	2.5	258	1.8	-208	-44.6%
Garrigues	18	0.3	136	0.7	39	0.3	-97	-71.3%
Garrotxa	48	0.7	277	1.5	93	0.7	-184	-66.4%
Gironès	152	2.4	556	3.0	317	2.3	-239	-43.0%
Maresme	367	5.7	963	5.2	773	5.5	-190	-19.7%
Montsià	62	1.0	347	1.9	122	0.9	-225	-64.8%
Noguera	35	0.5	234	1.3	58	0.4	-176	-75.2%
Osona	130	2.0	486	2.6	261	1.9	-225	-46.3%
Pallars Jussà	13	0.2	148	0.8	43	0.3	-105	-70.9%

County			BAROMETER		EGM - BAROMETER			
	Population (000)	Population %	Sample Size	Sample %	Sample Size	Sample %	Variation Interviews	Variation %
TOTAL CATALONIA	6,439	100	18,623	100	14,006	100	-4,617	-24.8%
Pallars Sobirà	7	0.1	78	0.4	45	0.3	-33	-42.3%
Pla d'Urgell	32	0.5	193	1.0	58	0.4	-135	-69.9%
Pla de l'Estany	26	0.4	191	1.0	47	0.3	-144	-75.4%
Priorat	9	0.1	77	0.4	44	0.3	-33	-42.9%
Ribera d'Ebre	21	0.3	187	1.0	42	0.3	-145	-77.5%
Ripollès	23	0.4	188	1.0	39	0.3	-149	-79.3%
Segarra	20	0.3	147	0.8	42	0.3	-105	-71.4%
Segrià	178	2.8	571	3.1	376	2.7	-195	-34.2%
Selva	146	2.3	525	2.8	271	1.9	-254	-48.4%
Solsonès	12	0.2	98	0.5	44	0.3	-54	-55.1%
Tarragonès	211	3.3	651	3.5	463	3.3	-188	-28.9%
Terra Alta	11	0.2	98	0.5	43	0.3	-55	-56.1%
Urgell	32	0.5	180	1.0	57	0.4	-123	-68.3%
Val d'Aran	9	0.1	98	0.5	43	0.3	-55	-56.1%
Vallès Occidental	744	11.6	1502	8.1	1638	11.7	136	9.1%
Vallès Oriental	334	5.2	835	4.5	696	5.0	-139	-16.6%

Source: Author's own compilation.

There is also a reduction in the sample taken in municipalities below 10,000 inhabitants, which were of particular importance for local and regional magazines.

Table 3. Comparison of the Sample Distribution According to the Size of the Municipality Between the 2013 EGM Barometer and the 2012 Barometer

	Population (000)	% Population	Show	% Show	EGM Barometer 2013 vs. 2012 Barometer	
					Variation Interviews	Variation In%
Size of the Municipality	6,165	100	14,006	100	-4,617	-24.8%
Up to 2,000	299	4.9	678	4.8	-1,090	-61.7%
From 2. to 10,000	847	13.7	1,777	12.7	-1,846	-51.0%
From 10 to 50,000	1,685	27.3	3,438	24.5	-2,436	-41.5%
From 50. to 200,000	1,276	20.7	1,835	13.1	-130	-6.6%
From 200. to 500,000	734	11.9	3,029	21.6	85	2.9%
Barcelona Capital	1,325	21.5	3,249	23.2	800	32.7%

Source: Author's own compilation.

IMPACT ON THE ACPC DATA

The FUNDACC sought to incorporate into the media map all the media present in the Catalan space of culture and communication either previously affiliated with the local press associations, or because of their proven market penetration. In contrast, a publication's inclusion in the EGM was based on a minimum audience that none of these publications used to reach. In the agreement signed between the AIMC and the FUNDACC, the publications to be measured were defined in a list, but to ensure that the questionnaire's application period was not excessive, the number of publications was limited. The ACPC was the worst affected association with just 50 publications taken into account.

Table 4. Number of Association's Publications

2012 Communication and Culture Barometer	APPEC	ACPG	ACPC	Total
Publications with data	136	91	113	340
2013 EGM Barometer				
Publications in the questionnaire	55	71	50	176
Publications with data	43	70	47	160
Reduction of publications	-52.9%			

Source: Author's own compilation.

The first annual results of the EGM Barometer Catalonia showed a general fall in audience in relation to the data provided by the Communication and Culture Barometer. The impact on the data of the ACPC publications was greater than that of the free publications, among other things, by its territorial distribution, further away from the area where the EGM Barometer sample had the highest incidence.

Table 5. ACPC audience 2012-2013

Publications	Periodicity	EGM - Barometer				Barometer	
		Total 2013	February March 2013	April May 2013	Oct-Nov 2013	Gen-Dec 2012	Variation In %
<i>El 9 Nou</i>	Weekly	93	116	90	75	117	-20.2%
<i>Revista del Vallès</i>	Weekly	29	44	30	12	46	-37.2%
<i>Diari de Vilanova</i>	Weekly	28	42	13	30	55	-49.5%
<i>El 3 de Vuit</i>	Weekly	25	31	9	35	34	-26.6%
<i>El Vallenc</i>	Weekly	21	23	22	19	27	-21.2%
<i>Setmanari de l'Alt Empordà</i>	Weekly	18	12	17	26	41	-56.6%
<i>La Veu de l'Ebre</i>	Weekly	16	13	15	20	34	-52.3%
<i>Delta del Llobregat</i>	Monthly	15	22	5	16	18	-15.1%
<i>La Comarca d'Olot</i>	Weekly	14	20	13	9	22	-36.0%
<i>Hora Nova</i>	Weekly	13	13	13	13	34	-61.5%
<i>Diari de Sant Cugat</i>	Weekly	12	6	21	11	12	3.6%
<i>La Revista del Baix Empordà</i>	Quarterly	11	18	-	16	21	-47.9%
<i>La Veu de l'Anoia</i>	Weekly	11	14	7	12	24	-54.5%
<i>Celso Informació</i>	Weekly	8	2	13	8	6	24.4%
<i>Revista de Palafrugell</i>	Monthly	8	8	10	5	5	47.9%
<i>L'Erol</i>	Quarterly	7	6	13	2	7	2.9%
<i>Nova Tàrraga</i>	Weekly	7	8	9	5	10	-28.9%
<i>L'Eco de Sitges</i>	Weekly	6	6	3	10	11	-47.4%
<i>Revista de Banyoles</i>	Monthly	6	2	7	8	6	-7.0%
<i>Som Garrigues</i>	Biweekly	6	5	7	6	9	-36.2%
<i>Cappont</i>	Quarterly	5	5	5	6	6	-16.7%
<i>El Pou de la Gallina</i>	Monthly	5	4	8	4	3	60.8%
<i>El Ter</i>	Biannual	5	2	11	2	6	-18.3%

Publications	Periodicity	EGM - Barometer				Barometer	
		Total 2013	February March 2013	April May 2013	Oct-Nov 2013	Gen-Dec 2012	Variation In %
<i>La Palanca</i>	Monthly	5	-	-	14	5	-7.4%
<i>La Torre</i>	Weekly	5	5	8	3		-
<i>La Veu de Flix</i>	Monthly	5	12	3	-	3	73.0%
<i>La Vila</i>	Monthly	5	4	10	2	11	-56.3%
<i>L'Om</i>	Monthly	5	1	8	5	3	65.0%
<i>Nova Conca</i>	Weekly	5	6	3	6	7	-32.1%
<i>Revista Cambrils</i>	Monthly	5	4	4	5	13	-62.8%
<i>Som-hi</i>	Monthly	5	6	-	9	7	-32.2%
<i>Ancora</i>	Weekly	4	6	5	-	13	-68.6%
<i>Diari del Baix Penedès</i>	Weekly	4	8	2	1	8	-49.9%
<i>Forja</i>	Weekly	4	4	1	6	9	-57.8%
<i>Sio</i>	Monthly	4	4	6	3	4	5.0%
<i>Des dels Quatre Cantons</i>	Monthly	3	5	4	-	4	-14.8%
<i>El Ripollès</i>	Weekly	3	5	1	4	9	-66.9%
<i>Llumiguia</i>	Monthly	3	6	3	-	8	-60.5%
<i>Alella</i>	Bimonthly	2	1	4	2	11	-82.2%
<i>El Pregoner d'Urgell</i>	Biweekly	2	-	6	-	3	-31.5%
<i>La Veu de la Segarra</i>	Weekly	2	1	4	1	7	-72.6%
<i>Ressò</i>	Monthly	2	4	-	3	5	-60.0%
<i>Segarra (Cervera)</i>	Monthly	2	3	1	3	5	-60.6%
<i>Avenç del Palau d'Anglesola</i>	Quarterly	1	-	4	-	2	-37.1%
<i>El Replà</i>	Bimonthly	1	1	0	2	4	-74.7%
<i>L'Esparver</i>	Bimonthly	1	2	-	1	4	-75.1%
<i>Terrall</i>	Bimonthly	1	-	1	4	2	-51.9%

Source: Author's own compilation. Data in thousands.

The changes made to the study were quite significant and had a larger impact than what had been originally anticipated. The variation in methodology as regards local press and magazines audience in Catalan could amount to a decrease of 22% as a whole. This estimate was made on the basis of weighting the trends in the evolution of the audience of the magazines in Spain in relation to Catalonia, together with the possible evolution of magazine audience had they

had continued to be measured with the Communication and Culture Barometer methodology.

In the case of radio and television, the decline in audience was not so significant. There were only slight changes in leadership and the invisibility of some very local media means that they no longer appeared with clarity in the original Barometer.

Despite efforts to justify the new data methodology, local press associations and Catalan-language magazines began to express concern over results which positioned them poorly. Finally, the withdrawal of their support and the lack of conviction of public institutions in the usefulness of the project without local market consensus ended with the closure of FUNDACC and the completion of the study.

CONCLUSIONS

Audience measurement institutions are central to the definition of communication and culture spaces. From the communications industry, there has always been a desire to position themselves as being neutral and independent organizations, almost as if they were passive spectators within the sector. However, as explained in the text, changes in audience data are primarily caused by changes in the structure of the business or political institution, rather than by a technical will to improve the instrument. The effect on the Catalan communication space as a whole has three dimensions: economic, cultural and political.

ECONOMIC DIMENSION

The impact that being a commercial undertaking, and therefore subject to market forces, has on its measurement causes the decisions made at these institutions to harm the smaller media. The extent of these changes can lead to significant audience loss or even the total invisibility of these media in audience rankings. Only 14 out of all those media measured appear in the EGM Barometer rankings, as can be seen in table 5. Conversely, publications with considerable regional or supra-county presence such as *El 9 Nou*, *Revista del Vallès*, *Diari de Vilanova*, *El 3 de Vuit*, *El Vallenc* and *Setmanari de L'Alt Empordà* suffered declines of between 20 and 60 percent.

CULTURAL DIMENSION

Without doubt, the most serious effect of the transition from the Communication and Culture Barometer to the EGM Barometer was the inability to fully discern the presence of the use of the Catalan language in the media. The presence of Catalan is misrepresented, causing what Casero calls a loss of transparency in the Catalonian media system (Casero, 2009), because it is impossible to characterise the scope of the entire space of communication and culture. As can be seen from table 2, 52.9 percent of the publications measured with the Communication and Culture Barometer disappeared off the screen altogether.

POLITICAL DIMENSION

Although this particular aspect may not be apparent in an initial analysis of the problem, the political consequences of the disappearance of local and county media from statistics are nevertheless still of particular importance. First, because in the short-to-medium term, it can lead to the closure of many of these media—as in the case of *Revista del Vallès* or more recently the *Diari de Vilanova*, for example—and, because of this, it has the result of impoverishing newspaper pluralism with a local perspective, with the consequent loss of quality in the Catalan democratic system. Conversely, it also becomes difficult to make public policy decisions in the field of communication and culture because complete information is not available on all media.

The situation of permanent fragility of the Catalan communication space (Gifreu, 2009) forces us to think about the future audience measurement systems in Catalonia, consider the usefulness of the data obtained for the communications industry, its production cost and the faithfulness of representation of the audience it is analysing. The experience of FUNDACC and the Communication and Culture Barometer must allow the audience to be explained, not only as being part of an audience or a consumer, but also as being a citizen. The presence of new players in audience measurement using Big Data and algorithms (Petit, 2017) open the door to strategies of international scope with an abundant capacity for considerable influence in communication and culture spaces. These new players and systems can facilitate audience measurement at a time when the diversity of media, both analogue and digital, makes it difficult to obtain integrated audience data at a cost that is affordable to all players in the media industry.

Although it seems that monitoring systems will be able to reduce production costs more and more, it seems difficult to believe that it will be possible to sustain them locally without the financial support of the public sector. As Napoli aptly described it, the simple logic of the market does not take diversity into account and favours the mainstream media (Napoli, 2008).

The experience of FUNDACC and the Communication and Culture Barometer confirms that measurement institutions are indeed fundamental in not only the specification, but also in the creation of culture and communication spaces. Judicious representation of these spaces is essential, not only for the economic development of the communication and culture sectors, but also for ensuring the full engagement of their cultural diversity. Although technical excellence is a fundamental requirement, it is only possible to achieve this goal using measurement institutions that are independent, both economically and politically.

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