Audience measurement for local and other TV channels (the Spanish experience)

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The TV scenary in Spain

	Audience share
4 National Chan. (public and commercial)	81,3%
8 Regional Channels (public)	15,4%
1 Pay-TV Channel (Canal Plus)	2,3%
Others	1,0%

The “Others” group is built up by: satellite, local and terrestrial foreign channels.

Yearly TV advertising expenditure: 1.640 million $

Reception capabilities

	% on total households
Cable suscribers	3,4
Satellite (private and collective dishes)	3,4
Reception of at least one local station	34

- The number of channels received by the average household is 6,3. Those households receiving more than 10 channels represent a 5%.

Satellite channels

Received through dishes, cable services or local stations.

	Reception	Monthly reach
Galavision	12,9 %	6,2 %
Eurosport	7,7 %	4,2 %
MTV	3,5 %	1,4 %
CNN	3,4 %	1,3 %
RTL	3,3 %	1,2 %

- Estimated share of this group of channels (altogether): 0,3 %

Local TV channels

- Number of channels : 881
- Basically terrestrial but some of them by cable.
- Public (town councils) and commercial
- Wide variability among the stations.
- Non-regulated environment up to the end of 1995.
- New law approved by December 1995 will contribute to their future development.
- Estimated audience share : 0,3 %

Local TV channels

The typical characteristics among the 60 most important local stations are approx.:

- Coverage : 150.000 inhabitants
- Average audience indicators (within homes receiving):
  - Daily reach : 7 %
  - Weekly reach : 40 %
  - Share : 1,5 %

Expectations of advertising income (in thousand dollars)

On the basis of the respective audience share and making an optimistic evaluation,

	Single channel	Altogether
Satellite (the biggest 5)	2.000	10.000
Local (the biggest 60)	170	10.000

“Reasonable” research budget

- The cost of the actual TV audience measurement system represent around 0,6 % of the expenditure on TV advertising.
- If we apply a liberal 3% to the expected income, we have an upper level for the available research budget (in thousand dollars):

	Single channel	Altogether
Satellite (the biggest 5)	60	300
Local (the biggest 60)	5	300

AIMC suggestions

Satellite

- A syndicated approach is feasible. Two alternatives:
  - Present meter panel with or without a booster sample. Audience indicators based on a monthly time frame.
  - 7-Day-Self -Completion Diary as recomended by the EBU. One or two waves per year. A sampling frame of satellite households has to be created (our multimedia survey can be used)

AIMC suggestions

Local channels

- A syndicated approach is not feasible, as principally the respective broadcast areas do not overlap.
- Ad-hoc surveys were recommended. Because of the serious budget restrictions we favour the cheapest possible methodology : phone interviews using the day-after-recall system.

Ad-hoc surveys for local channels

10 surveys under the supervision of AIMC have been conducted so far. The structure of the basic questions is as follows:

- Which channels do you receive (national, regional, local or foreign)? (Aided recall).
- Did you watch TV yesterday? When and which channels?
- Which channels did you watch during the last 7 days? during the last 30 days?
- Frequency question for every channel received.

Ad-hoc surveys for local channels

- Daily and monthly reach are not consistent ("telescoping" effect)

– Channel A	5,5	26,1
– Channel B	1,8	30,3
– Channel C	4,4	33,5
– Channel D	3,2	30,9

- The industry has started to accept the weekly reach as the "currency" to buy and sell commercials. Share and daily reach indicators are so small that channels decided not to provide them.