Analysis of the contents of the advertising saturation on television

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Abstract
Nowadays television media suffers over saturation of advertising. Apart from the legal limitations and the logical regulation and the supply and demand market, stations continue to increase their commercial contents to unbearable limits throughout their programming and generating a perception of the extent of advertising saturation and its contents in the television media. The paper aims to analyse the level of advertising saturation and its contents in the television media. The methodological approach of the study is based on a limited consideration of the real cognitive process of the audience, quantifies different commercial forms that are not specifically programming and that greatly increase the advertising noise and the perception of saturation. On the other hand it is interesting to define the strategic use of each channel towards its commercial spaces.

Keywords: television advertising, advertising saturation, advertising noise. Non-conventional types of advertising, general broadcasting.

JEL Codes: M31, M37.

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1. Introduction

At the moment television media suffers what is known as advertising saturation. In Spain, the problem is even greater than in other European countries, as the adaptation of the so called “Television Law without Frontiers” (from the Spanish name “television sin fronteras”) is even more permissive. The stations, public and private, abuse the time dedicated to advertising. The average amount of time dedicated to advertising is far beyond that accepted by the viewer and, as such, this media has lost a great part of its supply and demand market. Stations continue to increase their advertising to unbearable limits throughout their programming. It may seem unavoidable when it is their only source, (almost 95%), of income (commercial channels). There are studies about the perception of saturation on audiences that reflect their understanding that television contents is advertising with programmes inserted. It would be difficult to invert this tendency unless all the stations accept changes in commercial standards. The advertisers and planners should assume this reality and should develop procedures to reach reasonable levels of efficiency.

Figure 1. Saturation of commercial communication on television

<table>
<thead>
<tr>
<th>BROADCAST</th>
<th>COMMERCIAL COMMUNICATION MINUTES</th>
<th>MINUTES/DAY</th>
<th>INCREASE %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>11.Jun/01-May/02</td>
<td>11.1.Jun/02-May/03</td>
</tr>
<tr>
<td>TVE1</td>
<td></td>
<td>81.217</td>
<td>91.632</td>
</tr>
<tr>
<td>LA2</td>
<td></td>
<td>62.522</td>
<td>72.156</td>
</tr>
<tr>
<td>T5</td>
<td></td>
<td>131.218</td>
<td>142.382</td>
</tr>
<tr>
<td>A3</td>
<td></td>
<td>143.744</td>
<td>136.299</td>
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<tr>
<td>C+</td>
<td></td>
<td>34.111</td>
<td>37.185</td>
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Specifically, “television advertising saturation” (González Lobo y Carrero López, 2003; pp. 86-87, Reinares y Reinares, 2003; p.149) can be defined as the percent of time devoted to advertisements, based either on total programming time or on the authorized upper limits for advertising time. The law restricts the amount of airtime that may be devoted to advertising, and broadcasters are not allowed to exceed specific daily and per-daypart limits1. Nevertheless broadcasters frequently reach these limits, a situation which is exacerbated in comparison to other media due to the greater impact which television has on society; the rigidity of its structure – in the sense that neither broadcast time nor content can be extended, nor, consequently, can the advertising ratio be balanced; and most importantly, the surreptitious or unregulated use of so-called “non-traditional” formats which, in accordance with our working hypothesis, exceed the threshold of advertising saturation.

In addition to the saturation problem, one must also consider what is commonly referred to as “advertising noise”, a term which alludes to the interferences which impinge upon the effectiveness of communication as a result of the increased number of spots per advertising minute (Reinares y Reinares, 2003; pp.150-251). As well as producing a rise in the total number of minutes of advertising in all the different time bands as it is shown in the paper, the number of adverts has also risen extensively. There is a growing proportion; at the moment almost 33% of spots that are of a very short length (1-10 seconds). This not only affects the rise in perception of saturation but a greater number of spots per minute of advertising transmission and a greater period of time is dedicated to advertising which directly affects the non-fulfilment of the presumed communicative efficiency. Of the total amount of time dedicated to advertising and adverts transmitted on television viewers have only seen 1.5% of them. This data is disappointing, but we cannot forget that behind the quantitative data there is another reality: because the commercial blocks contain ever more spots, the memory capacity is logically reduced.

(1) Spanish television advertising is regulated by the law of 25-1994 of 12th June, which incorporates the Spanish judicial order of the directive 89/552/CEE on legal dispositions and co-ordination, rulings and administration of the relative member states to the exercise of television broadcasting activities. The said European Community rule was modified in the new ruling 97/36/CE, which consequently brought around changes to the law 25/1994 through the law 22/1999 of 7th June. Article 13 restricts the total amount of time that may be devoted to advertising, with the exception of certain types, to 20% of daily broadcast time and to 17 minutes (12+5) per clock hour.
In this context, it was inevitable that new forms of communication with the audience would emerge (Ortega, 2004; pp. 120-122, González Lobo and Carrero López, 2003; pp. 160-162, Tellis and Redondo, 2002; pp. 435-440, Díez de Castro, Martín Armario and Sánchez Franco, 2002; pp. 69-70, Rodríguez del Bosque, Ballina Ballina and Santos Vijande, 1998; pp. 123-124). These new formats of communication have named as “non-conventional forms of advertising”. Following the previous researches of the authors that television is used as a communicational support, in order to take advantage of commercial space and its different time length to insert spots (Santesmases Mestre, 2004; pp. 768, 704-705, Reinares and Reinares, 2003; pp. 238-239, Reinares Lara and Calvo Fernández, 1999; pp. 243-253). The appearance of these advertising formats in the early 90’s, coinciding with the start of private televisions, implied a step-back in the media, the effects of which, over a decade later, have not yet been fully studied. Moreover, conditions in the Spanish advertising market have produced developments of surprising formats, many of them unique in international television. For an approximation to the reality of commercial communication in our country shows the strategic importance the agents who make up the advertising market, that exists nowadays using alternative commercial means in comparison to traditional methods. This allows advertisers to
distinguish themselves from their competitors from other ideas in advertising, and has also become an important economic resource for televisions in general. As is logical, one of the main objectives of TV stations is to commercially optimise the legal maximum of 5 minutes that they can dedicate to “Other forms of advertising”.

2. Objectives and Methodological Approach

The main objective of this article is to analyse the amount of advertising saturation and its content in the television media, first, globally and second specifically for each television station. Within the main contributions to this study we should point out the one about:

1. Establishing a nomenclature and concept of the different types of advertising appropriate to the market, which involve the different terms in use within a descriptive concept based on common characteristics. Until now, the mistakes in terminology generated by the different agents in the advertising market didn’t allow a real, integrated, quantitative approximation with an adequate time perspective.

2. Another main contribution begins the methodology applied in the study, in the measure in which the analyses of saturation in the media and its different supports have detached from an approximated consideration adjusted to the real cognitive procedures of the audience. The different organisations that supply information about media saturation do not consider diverse commercial forms which nevertheless, increase advertising noise and the perception of saturation in it. Therefore, in the method of the investigation, the various commercial forms included by the authors will be indicated and justified.

3. In addition seems interesting to define the strategic use that each television station makes of its commercial spaces. The analysis of the importance and distribution of the different formats in the stations subjected to the study show a specialization in the conception of some formats.
4. As to the forms analysed, their evolution will be studied in a long enough period to establish conclusions together with tendencies in their use.

The working hypothesis reasons that “television broadcasters make use of non-traditional advertising formats not included within the current regulatory framework in order to surpass the advertising saturation threshold”.

Both primary and secondary sources of information were used for our research. On the one hand, in order to establish a correct and homogeneous conceptualization of the different forms of commercial communications appearing on television, the different possible types were characterized, having been identified a priori by the researchers based on the observation of television programming broadcasts. With respect to the secondary sources, a first study of the possible sources of information adequate to the main objective of this research, determines that the source used, reports made specifically for the Association of Users of Communication (from Spanish name Asociación de Usuarios de la Comunicación -AUC) by Sofres since 2000 through the Spanish Association of advertisers, is the most adequate. From this source a temporal disintegration has been made within the different stations’ formats, adapting the information to the objective of the proposed analysis. At the same time an elimination of those advertising formats has been made with a residual importance to reduce the complexity in further analysis.

The study of formats has been made on the five general and national stations: TVE1, TVE2, Antena 3, Tele 5 y Canal +. As for the time frame, it is believed that a 24-month period is sufficient to make a quantitative analysis. On the one hand it allows us to compare the evolution of the formats in two consecutive years, and on the other hand, 24 months is a long enough interval to contrast trends and seasons. Given the continual evolution of the media, if prior time periods had been incorporated, we would be including an error deriving from the information obtained from scenarios that are not in any way close to reality, now so dynamic.
Another decision made from the use of this source, as it has been pointed out within the objectives, has been the regrouping of the classification used in the AUC. This organisation does not consider some of the formats as advertising. Which are not proper programmes and as such they have been considered as advertising noise. These formats are self-promotions, the progress in today’s programmes and advances. It is true that they are not legally advertising, because they do not have the intent under the commercial administration of an outside agent. Nevertheless, one of the objectives of this investigation is to determine the importance and evolution of all that is not strictly programming and as a consequence of this the problems caused by imposing - interrupting them - on the audience. In addition, within self-promotions we are talking about the advertising of each station, in which case, we can consider it as having a commercial objective, as its objective is to make audiences faithful so they can make a profit out of selling advertising space. We may argue the supposed information content of the adverts for further programmes but in this study we will discuss it within the same premises as those of self-promotions. They are not strictly television contents, nevertheless they are subject to repetition, they increase the timing of the advertising slot, and they try to gain audience (commercial intention). For this reason it has been decided to incorporate all of them in the study under the grouping of FORMATS. This way, a first classification divides the television contents in programmes and FORMATS. The name of format has been chosen to define all that is not strictly a programme. This way we avoid making the mistake of naming them advertising formats (as it has been done on other occasions). This wide concept will include conventional advertising and what the authors have named “non conventional advertising forms”, in which we include the three afore mentioned types, which are not really advertising as pointed out earlier, but perceived by the audience as advertising noise within the programmes and which increase the perception of saturation of the media. In this sense, it is important to point out that logically the results of this inves-
investigation do not coincide with other sources, although they have all been deduced from the same primary information given by Sofres. It is because one of the main objectives of this study is to group all the contents on television that is not strictly programmes and that, independently from their legal or commercial considerations, are perceived by the audience as something outside the initial objective for which they find themselves in front of the television.

3. The relationship between programmes and FORMATS

Figure 3 shows the average number of minutes dedicated to the formats by the five stations together, analysed within a period of 24 months. Two years is time enough to determine what the tendency is in all the Spanish televisions over the share of programmes and FORMATS. Given that the stations all broadcast throughout the maximum time (24 hours a day) an increase of the daily time dedicated to advertising formats is balanced with a reduction of the time dedicated to programmes.

As for the programming, there is a clear tendency, except for some balancing, to greatly reduce the time that all the stations dedicate to the programmes themselves, consequently increasing the commercial spaces. From dedicating 17.24% of the whole of the television programming to FORMATS, it has changed to 17.95%. As a percentage it may seem only a slight increase, but analysing the absolute values (the minutes that this increase means) we find an increase of 26,842 commercial minutes in just one year. In fact it has gone from 452,812 minutes in June of 2002 to 479,654 minutes in 2003. This first figure makes us think about the evident increase of the space dedicated to elements that are not natural within the stations contents.
Logically, this evolution is not proportional to all of the stations. Figure 4 shows an elaborated proportion, with the average percentage of programmes and formats of the five general stations in of the total minutes transmitted. The maximum levels for the period analysed period of daily time dedicated to programmes for all of the five stations are reached in the month of August 2001 (6041 minutes, a maximum level that has not been reached since then), January 2002 with 6003 minutes of programmes daily and the month of January 2003 (5954 minutes). These maximums in the month of January and August do not follow a strategic goal from the stations to reduce the time dedicated to advertising. It is known (the advertising investment confirm this) that during these months advertising investment is reduced to minimums for different circumstances: in August due to the loss of audience, and in January due to the advertising investment concentrated in the Christmas period. As a result of this the increase of the time dedicated to the programmes is due to the fact that the stations have not been able to generate the same amount of advertising as in prior periods, which means they occupy free space with more minutes of programmes.
The minimum level of time dedicated to programmes is logically reached in the periods where the demand of advertising space, conventional or non conventional, is at its highest. In the analysed period the minimums are reached in September 2002 (5811 minutes) and December 2002 (5847 minutes). Looking at the facts, and contrary to what the stations say, the contents are just an excuse to insert advertising formats, which means that these are subject to the commercial capacity of the media and not viceversa.
On the contrary and going deeper in the previous presumption, the months which have a greater demand for advertising space on the advertisers side, are those in which the stations extend the time dedicated to commercial formats to maximum levels. These are reached in September 2002 with 1374 minutes and December 2002 with 1396 minutes. The minimum level is reached in the month of January 2003 with 1235 minutes. This decrease in the commercialised space recovers the following month, reaching the high levels that this study has shown. In figure 5 it is shown a clear growth tendency not consolidated by the great swings between months, which shows a lack of guarantee in the commercial strategy of the stations, as the facts that the separate analysis will show.

Figure 6 shows the daily times, according to the average period of 24 months, that the 5 stations analysed dedicate to formats. Obviously the lowest levels are reached by Canal +, whose position responds to a station which does not have advertising spaces.

Later we will show that this station commercialises non-conventional advertising formats in different levels, which are very similar to the ones used by other stations. It uses them but in a more strategic way compared to its rivals. We can also observe a similar structure in the daily formats and the contents and between the two public stations: TVE 1 and TVE 2.

Figure 6 shows that Tele 5 does not substantially need to act on the time dedicated to the contents for growth in profit from advertising formats. As it will be proven, the growth of profit in advertising space is not a cause of reduction in contents, but from reducing the less profitable formats and increasing the most profitable ones. Antena3 shows an erratic audience and commercial policy. The fact that from January 2003 this channel has substantially increased the time dedicated to contents is not due to the channel wanting to benefit their audiences by reducing advertising saturation. This is just a reflection of the failure of their commercial arguments. The lower capability of Antena3 to commercialise an advertising space is a consolidated tendency, with greater monthly tactical oscillation, which leaves a greater space to dedicate to contents.
Logically Canal+ presents the most regular tendency in respect to the time dedicated to advertising formats, with a minimum level of 86 minutes a day in August 2001 and a maximum of 107 minutes in September 2002. It is evident that this channel uses certain commercial formats in a more aggressive way than expected. It seems clear that this channel relies on an increase based on the most profitable commercial formats. This will be confirmed later on when the evolution of the different commercial formats in this station have been analysed.

TVE1 presents the minimum levels in August 2001 (191 minutes per day) and March 2002 (211 minutes). The maximum levels are reached in June 2002 (257 minutes) and December 2002 (273 minutes). Figure 6 shows that TVE1 is at a lower advertising saturation level than Tele5 and Antena3, however a later analysis of the different formats will demonstrate that this channel presents some higher increases in some cases higher than its competitors. Especially during a twelve month period, in which the study is based, TVE1 has increased the time dedicated to commercial formats from no less than 11.37%, for a total of 81.217 minutes from June 2001 to May 2002, at 91.632 minutes in June 2002 to May 2003.
Even greater is the increase of advertising space in the second public station, specifically a 13.35% increase. The figure shows a growth practically parallel to the increase of advertising space in total. In this way TVE2 presents minimum levels in the early part of July and August 2001, 150 minutes and 151 minutes respectively. The maximum level is reached in December 2002 with 226 minutes per day dedicated to commercial spaces. Apparently, once the first channel reaches the peek of saturation, the public enterprise tries to take the same type of criteria to the second channel.

Antena3 as well as Tele5 present a varying point as it is shown in Figure 6 in October 2001, where Tele5 reached the minimum level of formats commercialised (332 minutes). We must remember that at that time the legislator made the stations take the so-called sponsored advances off. This limitation reduced, at least during that month, the commercial capacity of both stations. The later levels of recovery have been very different between them. In a clear consolidated tendency, Tele5 reached the maximum level in December of 2001, with more than 386 minutes dedicated to commercial formats. A further analysis will be needed to prove that the total time per day that the stations dedicate to advertising formats is shared in a different way between the different stations. A station like Tele5 may not grow with this variable however it may progressively increase its commercial income. It is simply the administration of the advertising space and the different formats.

This shows that for example Antena3 is the only station that in the 24 months that were analysed reduced the total time dedicated to advertising. Specifically 5.18%, while Tele5 increased 7.84%, however, behind this data is hidden the commercial strategy which transfers into a greater income for the station. As can be seen when breaking down the formats, Antena3 reduces these viewing figures by noticeably limiting the marginal formats and those that are less profitable (however that have a great impact on the total time) such as teleshopping. This reduction in time does not relate to an increase in income as Antena 3 in its commercial strategy does
not develop formats that are economically beneficial. One of the major
downfalls of Antena 3 was failed commercial strategy for the month of
December 2002, with 385 minutes of commercialised formats. Although
this number seems high, it must be compared to the graph of growth in
December in relation to its counterpart, there being a very insignificant
growth against the maximum that during that month TVE 1 and TVE 2
achieved. Later, in the month of January, its direct competitor Tele5 shows
solid evidence that without a solid commercial strategy it obtained the
same level of investment as the month of December. While Antena 3 redu-
ces its minimum levels (382 minutes), therefore reducing the investments
of the advertisers, Tele5 is able to take a bigger part of this investment.

4. Individual analysis of the format

4.1. Self-promotions

Figure 7 shows the development of self-promotions adding the maximum
of the total time that the five enterprises dedicate to this format through-
hout the 24 months in their transmissions.

Figure 7. Evolution of self-promotions
Although it is necessary to break up the developments of self-promotions according to the targets reached by each of the five stations, as is shown in figure 8, it is also enlightening to determine the global development, as it shows a repetition of the average levels when comparing twelve months with the equivalent previous period. Although there is an understanding in the time dedicated between the stations towards the self promotions when comparing year after year, in the period of twelve months there are great swings with minimal level from around 6 minutes daily together with maximum levels nearing 18 minutes. The graph proves that in the months where conventional advertising spaces are reduced the time dedicated to self-promotion increases.

**Figure 8. Evolution per station of self-promotions**

![Figure 8](image)

Figure 8 shows that there is no common strategy in self-promotion on the behalf of the five stations. Television Española is the company that dedicates more time per day to this format. A total of 3229.5 minutes throughout the 24-month period. This gives us an average of 4.42 minutes per day. The station that dedicates the least time to self-promotion is Antena 3, with only 1.15 seconds on average per day.
4.2. Advances in programming

Figure 9 shows the joint tendency of the five stations in respect to the advanced programming. In general, this is a solid format, as is shown by the regular number of minutes shown daily throughout the 24 months. One of the first conclusions is that the stations reduce the minutes dedicated to advance programming as the time dedicated to other advertising formats rise. TVE1 reduced its total time of advances compared to the same earlier twelve-month period by 5.38%. TVE2 also reduced its time by 3.13%. The most noticeable decrease was seen in Tele5 with almost 26% daily. Antena 3 slightly increased the time dedicated to advances by 3.14% and Canal+ maintained almost exactly the same levels as in the previous period.

At first sight it seems logical, given the limitations of time in commercial breaks, that the stations balance the transmission advances in those months where there is more demand for advertising. However, this is a complex balancing act between the stations, as the optimal spot will depend on the level of viewing that the programmes reach where it is inserted. That is why, for the stations’ departments of marketing, inserting promotional spots that will achieve maximum notoriety is as important to them as for commercial advertising to achieve the maximum outlet for their products. For example, Tele5 inserts two advance programming in each block. This becomes many minutes per day. However to perceive if there are different levels of saturation in respect to this format with the other stations, it would be necessary to analyse the break down of the aims of each station.
TV1 is by far the station that dedicates more minutes per day to inform their audience of their programmes. However, it is Tele5 that reaches maximum levels in 2001, with an average of 49 minutes per day and in September of 2001 with a joint maximum of 59.5 minutes daily. From September, 2001, Tele5 (probably as this station was making a great effort to communicate the novelty of their new seasonal programming) started a progressive reduction, which has continued to the end of the analysed period. In May of 2003 Tele5 only dedicated 31.4 minutes to this format. Clearly Tele5 has made a great effort to dedicate the maximum possible time in commercial breaks to format with a direct income. We must remember that advance programming is not countable in the maximum time limit of commercial breaks. However, given that the stations use up in most cases the 12 to 17 minutes allowed, the abuse of the insertion of advance programming increases the levels of saturation to an unbearable degree.
Canal+ is in second place in the time that is dedicated daily to advances, however, in no case has it been found in the 24 months analysed to be above the other stations. This shows certain stability and settling in the use of this format. The minimum daily levels were reached in June 2002 (19.2 minutes daily in Antena 3) and in August 2002 (28.4 minutes on TV2). It is surprising to see the strategy of Antena 3, which takes up last place of the five stations in time dedicated daily to advances.

As a general conclusion advanced programming is the format, which gives a greater balance between the stations in the total time administrated. All the stations dedicate maximum value time dedicated to advance programming in the morning period. The minimum levels according to percentage values are reached in the time bands of early morning 1 and early morning 2.

4.3. Tele-shopping

Tele-shopping is a format whose use is almost completely monopolised by Tele5 and Antena 3. Figure 11 shows a clear tendency to reduce the use of this format, which proves that these stations are making an effort to eliminate them from their programming given the limited income they produce, the bad image that is associated with tele-shopping and the high perception of saturation it generates.
There is no tele-shopping neither on Canal+ nor on TVE2. TV1 only used this format for three months. Although, as shown in figure 12, there is a tendency to reduce the use of tele-shopping, there are great swings in the daily monthly time that Antenna3 and Tele5 dedicate to this format. Antenna3 reached the maximum level of daily time in August of 2001 with 151.4 minutes of tele-shopping and October 2001 with 150.4 minutes of tele-shopping.

Figure 11. Evolution of tele-shopping

The tendency of Antena 3, which is clearly superior to the others, continues until January 2003, where it falls below the levels of Tele5, and it has remained there ever since. With the current data, it is difficult to extrapolate (further than the evident reduction in daily time) what strategies Tele5 and Antenna3 will apply to the administration of tele shopping.
The analysis of the format according to the distribution of the time bands clearly show that tele shopping is relegated, on both stations, to the time frame of early morning 2 when the audiences are at a minimum. Although it is a format with many high ratio values and greatly increases the total time that both stations dedicate to commercial format, its effects on the perception of saturation of the stations will be proportional to the minimum values that are reached in the time frame where they are inserted. In early morning 2 they comprise 96.95% of the minutes transmitted on Tele5 and 95.21% on Antena 3.

4.4. Conventional spots
In spite of the incorporation of new non-conventional forms of advertising, the use of commercial space in its most conventional line generally increased the spot. Statistics indicate the total lack of effort of all the stations to reduce the number of conventional advertising insertions. This growing tendency is interpreted in a rise of 14.8% on TVE1, 18.16% on TVE2, 15.95% on Tele5, 8.54% on Antena 3 and 16% on Canal+. By the present levels of saturation the stations are very close to exceeding the maximum time allowed throughout their daily programming.
Figure 13. Evolution of conventional spots

Figure 14 shows that it is in this format where there is a greater similarity between the stations in the monthly development of time dedicated to spots. Antena 3 is the station that occupies first place with time dedicated to this conventional format. It is also the station that reaches maximum levels - 229.3 minutes in June 2002 and 224.7 in May 2003. This type of advertising is ruled more by the stationery market than non-conventional forms. This is evident when we observe the general rise in time dedicated to spots, which are produced in both months of December. In the months of August and January all the stations reduced the commercial time to conventional commercial spaces. Even so Canal+ maintained levels of time dedicated to spots well below its counterpart, neither can it be pointed out that approximately 50 minutes a day is a symbolic presence of advertising on this station. The behaviour of TV2 is especially noticeable, with a growing strategy of conventional advertising equal to TV1. This indicates that once the levels of viewers have been reached, which are interesting to the advertisers on TV2, the public enterprise uses the same aggressive criteria as those of TV1, starting from a lower previous level of saturation.
It is interesting to discover different elements when analysing the different time bands that indicate a saturation in relation to a specific station. In the morning; Antena 3 is the leader in time dedicated to spot in this time band, with a total of 42,153 minutes. The minimum level is reached by TVE2 with 25,954 minutes. In the morning time band there is an audience with a specific sociodemographical profile – housewives. Programming is usually occupied by lengthy magazines aimed specifically at this type of public, of which Tele5 and TV1 are reportedly the leaders in this type of programme. The fact that Antena 3 is not a leader in the morning time band, in spite of this it transmits a greater number of conventional spots, could be explained by the fact that they sell cheaper advertising spaces than their competitors. Afternoon as in the other time band the maximum level of spot saturation is always reached by TVE2. What varies noticeably between the stations are the maximum levels, in this case it is Tele5 that reaches the greatest number of minutes in the afternoon time band (2 to 5). Early evening; the maximum and minimum values are repeated almost exactly between Tele5 and TVE2. Late evening; it is Antena 3 that has more commercial minutes of spots. As this is one of the highest viewing time bands, the stations receive more of their income with the sale of com-
mercial space in this period. Contrary to what it may seem there are great differences between the three stations that utilise most time on commercials. TV1 only dedicates 27.935 minutes to spot in the late evening time band against the 30.822 minutes of Tele5 or the 32.729 minutes of which it is the greatest conventional commercialisation of Antena3. Early morning 1; Antena 3 also holds the greatest saturation in this time band, 18.313 minutes, a noticeably higher difference than its following competitor, Tele5, 17.384 minutes. Lastly in early morning 2; it is noticeable in this last time band analysed the saturation of Tele5 with 3.498 minutes of time dedicated to conventional spot.

4.5. Superimposition

A first approximation to the evaluation of this format shows a noticeable growth amongst the stations. TVE1 raises the time dedicated to superimposition by 64.1%, Tele5 by 65.5% and Antena 3 84.56%. Canal+ shows a high growth, but stable, (33.24%) and only TVE2 reduces the total daily time dedicated to superimpositions (an average of 14.2%). The ranking of the stations in respect to the use of superimpositions present evident changes in respect to other format. The station that uses the most is Tele5 followed by TVE2. This station, although it shows a fall in figures, starts from a very high level. The stabilization of this format on TVE2 is due to the specialisation of this station to transmit sporting events. We must take into account that legislation only allows insertion of superimpositions in this type of programme. The station that least uses this format is Canal+, although there is almost no difference in respect to the low level reached by Antena3.
Figure 15. Evolution of superimposition

Figure 15 shows great swings throughout these analysed months. If the use of superimposition is limited exclusively to the transmission of sporting events, or similar, it could be pointed out that the static use of this format is due to a logical irregularity of thought of the stations. However, how can we explain that Tele5 is the station that dedicates more time to the format of superimposition? The answer is due to a flexible interpretation on the part of the operator of the type of programmes where it is possible to insert them. In the months of maximum levels of Tele5 a new source of income is put into action already used on other stations that allows the interaction of viewers with the programme. Although the legislator allows this type of superimposition when there is a direct commercial intention, it demands that the station specifically identifies it as advertising. Thereupon, the total time that superimposition appears on the screen is countable within the permitted maximum time of other forms of advertising (17 minutes). We can also find in the early morning time band another explanation to the high development on Tele5. The early morning time bands are being progressively flooded with exotic programmes about astrology, fortune telling and social relationships. Contrary to tele-shopping where the whole programme is counted as advertising, the ombudsman only counts as advertising the time when the telephone number is superimposed on the screen for audience participation. Almost all the pro-
grammes transmitted live include superimposition as means to audience participation. The lowest levels reached of the total of superimpositions on Antena3 are explained in that this station uses conventional ways for audience participation, therefore, included in the segment of spot.

Figure 16. Evolution per station of superimposition

4.6. Programme sponsorship

The global development of programme sponsorship shows similar tendencies to the use of conventional spot by the advertisers. The programme sponsorship is the oldest non-conventional format; therefore its use is well integrated within the advertisers’ strategies. Therefore the way in which it develops throughout the year depends in which season it is transmitted thus giving the minimum levels obtained within the months of January and August. An analysis of each station shows that although they all use conventional sponsorship in their commercial strategy, it is Tele5 that has the highest level of saturation of this format. It is also noticeable that Tele5 shows a stable evolution throughout the twenty-four months analysed.
This is due to a stable and recognised commercial strategy on behalf of the advertisers with which they avoid stagnation usually pertaining to television advertising. This regularity presents an exception that affects both Tele5 and Antena 3, by there being a sudden reduction in countable time for sponsorship in January 2002. At this time the legislator intervened by restricting the so-called advances of sponsorship. This had hardly any repercussion in the amount of commercialised sponsorship for Tele5, but on the contrary, Antena3 embarked on an erratic tendency far from its usual pattern. This station presented its maximum levels of programme sponsorship in June 2001 (18.3 minutes) and September 2001 (18.3 minutes). Later on these levels were reduced with the final average being below Tele5. With respect to TVE21 and TVE2 we observe a similar development, although the time TVE1 dedicates to sponsorship is above that of TVE2.
All the stations generally reinforce programme sponsorships. The necessity for advertisers to obtain preferential advertising space and the necessity for the stations to optimise the 17 minutes of maximum space allowed makes the administration of this format a common practice in the majority of commercial breaks. However, the data indicates a clear specialisation of some of the stations towards this format. Tele5 is the leader in the use of daily minutes within this format. On the other hand, Canal+ uses it to minimal level in comparison to its competitors, but in a more stable way. Both public stations use the format with basically identical forms of administration.

TVE1 concentrates almost 40% of the total time dedicated to sponsorship to the maximum viewing band (evening). The minimum usage of this format is, as with the other stations, the time band between 2.30 and 7.00 in the morning. Contrary to the other stations, Tele5 concentrates a greater proportion of programme sponsorship in the morning band (24.08%). Antena3 also concentrates the majority of its sponsorship minutes in the evening band (26.4%), nevertheless evenly balancing the
distribution with respect to the morning, afternoon and early evening band.

4.7. Section Sponsorship

Section sponsorships (advertising format integrated within the programme) are in continuous development within all the television stations. Figure 19 shows their evolution. It depicts the great quantity of irregularities in their presence with a minimum saturation on Canal+ against the almost 9 minute daily of Tele5. Tele5 and Antena3 seem to take up the majority of saturation of this advertising integrated within the programme. There are large monthly swings which indicate that the commercial market has still not assimilated the presumed qualities of the format. Both public stations are far behind the daily time that Tele5 and Antenna3 transmit for section sponsorship.

Figure 19. Evolution per station of section sponsorship
As has been stated, Tele5 presents the majority of saturation in the last format studies. This is translated to a total of 4.371 minutes in the period analysed while Antena3 only commercialised 3.89 minutes. The analysis of the distribution of the format on the five stations depending on the time band shows proportionate differences. TVE1 concentrates in the morning time band 50.57% of the 2.195 minutes of the section sponsorship. However, TVE2 develops the format almost exclusively in the afternoon time band with a 63.84% (again due to the effect of the live sport transmissions). Also Tele5 and Antena3 concentrate the majority of their time given to section sponsorship in the morning band. It is noticeable that Antena3 transmits 74% of all programme sponsorships between 07.00 and 14.00 hours. We must take into account that the morning time band has contents especially appropriate to this format – lengthy magazines transmitted live and presented by known personalities.

5. Conclusions

As descriptive conclusions of this study, the following should be highlighted:

1. We can clearly observe a growing tendency both in the use of convention advertising (spot) as well as non-conventional format in the Spanish television media. Once the maximum limits of authorised conventional advertising have been reached the stations try to increase their income by increasing the saturation in non-conventional advertising developments. Only Antena3 reduces the total time dedicated to advertising, 5.18%, either conventional or non-conventional as an adjustment to its commercial strategy towards more beneficial format. Advertising saturation reaches truly surprising levels - on Antena 3 and Tele5 it takes up a quarter of the total time of transmission (25.96% and 27.09% respectively). The saturation is accounted for if we take into consideration that this data is an average of 365 days divided proportionately throughout a 24-hour day. Taking into account the monthly stagnation of advertising,
and that in some time bands (early morning 2) the saturation decreases, it is possible to find in prime time bands an almost proportionate split between programming and advertising format.

2. There are high indications of growth amongst all these stations under the specific grouping made for this study, which include under the concept of FORMATS, the advertising forms in use with the non-conventional and self-promotion, programme advances and intervals. We observe a more drastic rise in time dedicated to advertising (taking into consideration both that of the external advertisers as well as the stations themselves) than that from the usual sources which analyse their quantitative development such as AUC, Infoadex or Sofres.

3. No significant quantitative or qualitative differences exist between the public channels (TVE1 and TVE2) and the private channels as regards their strategies for marketing advertising formats. It is even surprising to find that both public companies show major increases in the daily time dedicated to advertising format: TVE1 draws 11.37% and TVE2 13.35%. This commercial aggressiveness of the public companies, together with their double system of finance, contributes to a rise in competition that hinders the efforts to reduce the advertising saturation in the media.

4. However, there are great variations in the development of the formats analysed. To simplify, all the stations tend to increase the spaces dedicated to the advertising form which bring in the most income, reducing (as well as the programming) the time dedicated to self-promotion, programme advances and intervals (formats that do not produce direct income to the station), as well as substantially shortening the time dedicated to tele-shopping (format which is commercialised at a very low cost).

5. The five television companies analysed use the format of non-conventional advertising in a strategic way as a fundamental basis of their commercial policies. We can clearly identify differential elements between the numbers of minutes dedicated to non-conventional forms and the stagnation of these between the different stations. Not all the stations show a uniform strategy in the use of these formats, Antena3 being the station
with the least consolidated strategy. On the other hand, Tele5 is able to consolidate its commercialised format, such as programme sponsorships, offering a distinctive commercial strategy based on the development of the most viable non-commercial advertising format.

6. In spite of the stations stating for years their intention to reduce the total time dedicated to conventional advertising (spot) with the objective of increasing their efficiency the data shows a tendency to the contrary. TVE1 increased its total time dedicated to conventional spots by 14.98%. TVE2 had an increase of up to 18.16%. Tele5 of around 16%, approximately the same increase as Canal+. Antena3 has the least increase in conventional advertising with 8.54%. The figures show that the effort made by the stations is not concentrated on reducing the advertising times, very much to the contrary, as well as increasing up to the authorised limit of convention advertising practically in every time band, they seek to increase their income by means of the most viable non-conventional forms.

7. The increase in time dedicated by the stations to advertising forms, conventional or non-conventional, is not proportional to the increase in income (according to the public defragmentation data). This indicates that the continual commercial competition amongst the stations means they must maintain or even lower the prices of their advertising spaces.

8. There is a certain balance in the distribution of conventional advertising throughout the daily time band amongst the five stations (logically proportional to the volume of commercial spots in the five cases). Canal+ tends to differ from this, reducing the majority of its conventional advertising in the afternoon and late evening time band (practically 70% of its spots). The same does not happen with non-conventional formats. The major difference in distribution between the stations of the non-conventional forms according to time band corresponds to superimposition and programme sponsorships.

9. The interruption of the last period taken into account (2001-2003) of the superimposition as a very important format within the commercial policy of the station should be noted. The superimpositions increase on
TVE1 by 6.41%, on Tele5 by 65.8% and on Antenna3 a staggering 84.56%. Traditionally this was a format relegated (for legal reasons) to TVE2. However, this is the only station where there was a decrease in superimpositions (14.02%).

From a regulatory standpoint it should be pointed out that:

1. The current adaptation of Spanish law to European advertising rules presents permissive criteria that open up countless opportunities for television channels to develop advertising formats for which limitations should be considered in order to curb advertising saturation.

2. Although the quantity of seventeen minutes of advertising per programming hour seems to have been accepted within the Spanish market, these figures are well above the average for the rest of European television channels. We must also keep in mind that the channels are constantly at the limit of allowed advertising saturation.

3. This amount of advertising – already disproportionate in itself – would be surpassed if, as is logical, other formats not currently subject to time limits were to be included in the calculation of maximum amounts of time. In this respect, it is not reasonable to exclude a channel’s promos for upcoming events and self-promotional advertisements when calculating upper limits for advertising time. Although these two types of advertising do not constitute messages paid for by an agent external to the channel, they clearly contribute to advertising saturation. Despite the efforts of networks to self-regulate this format, the quantification of such messages shows the maximum authorized interruption time for blocks of advertising during programming would frequently be far surpassed. Their inclusion in such calculations together with other advertising formats would make it possible to demonstrate – as our research reveals – that more than a fourth of daily broadcast time is taken up by commercial materials, either from advertisers or the channel itself.

4. It therefore seems clear that the upper limits established by law should be revised and the calculations pertaining to these limits should
include a much stricter definition of what constitutes a commercial message.

Following a long period of debate due to the difficulty of establishing common criteria regarding television management and marketing in all European countries, a consensus has been reached regarding the revision of Directive 89/552/CEE, on the coordination of certain provisions laid down by law, regulation or administrative action in member states concerning the pursuit of television broadcasting activities. As established by our research, Spain exhibits a stronger tradition and greater development of non-traditional advertising in comparison to other European countries, a fact which explains the active role played by our country in the revision of the EU Directive. The new points incorporated among the Directive’s main principles include a great number of the conclusions reached in the present study, including the regulation of upper time limits, the conceptualization of formats to more adequately reflect normal market practice and the strict need to identify advertising messages.

6. Bibliography


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LEY 22/1999 DE 7 DE JUNIO DE MODIFICACIÓN DE LA LEY 25/1994 DE 12 DE JULIO, por la que se incorpora al Ordenamiento Jurídico Español la Directiva 89/552/CEEE, sobre la coordinación de disposiciones legales, reglamentarias y administrativas de los Estados miembros, relativas al ejercicio de actividades de radiodifusión televisiva.


