

TELEVISION

Angeles Yagüe Content Director

岁寒，然后知松柏之后凋也

 *QUE VENGA EL INVIERNO Y SE VERÁ QUE PINOS Y CIPRESES NO PIERDEN LAS HOJAS*

Agenda

I. Current Situation

i. Audience Growth

ii. Solid Grid

iii. Valuable Channel

II. Antena 3 Strategy (2006)

Increase the audience

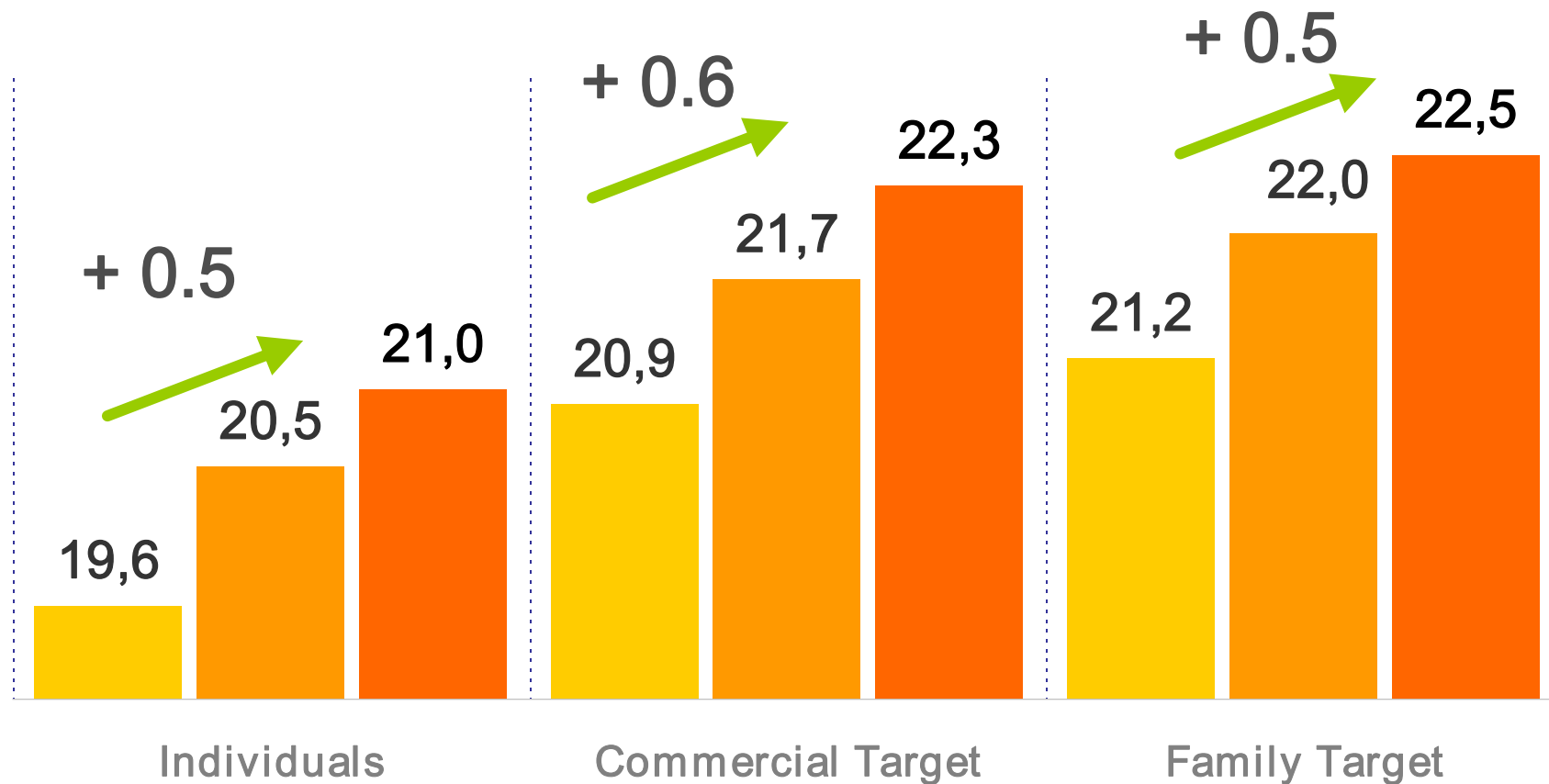
Second consecutive year of growth

→ The best results in the last 5 years

24 hours

9M '05
9M '04
9M '03

SHARE%



Commercial Target: Individuals 13-54 / All social classes except Lower/ +10.000 inhabitants

Family Target: Individuals <54 in homes of 3 or more individuals

Source:Sofres A.M

Antena 3's solid grid

Variety, loyalty and daring

➔ Programming for an increasingly more demanding audience

	MON	TUE	WED	THU	FRI	SAT	SUN
09:00	NEWS					KIDS	
09:30	NEWS						
10:00	TELENOVELA						
10:30	TELENOVELA						
11:00	MAGAZINE						
11:30	(CURRENT AFFAIRS +						
12:00	GOSSIP)						
12:30	GOSSIP						
13:00	GOSSIP						
13:30	GOSSIP						
14:00	KIDS					MOVIES	MOVIES
14:30	KIDS						
15:00	NEWS						
15:30	NEWS						
16:00	TELENOVELA						
16:30	TELENOVELA						
17:00	TELENOVELA						
17:30	TELENOVELA						
18:00	DATING					FICTION USA	CURRENT AFFAIRS
18:30	DATING						
19:00	TALK-SHOW						
19:30	TALK-SHOW					GOSSIP	CURRENT AFFAIRS
20:00	QUIZ						
20:30	QUIZ						
21:00	NEWS						
21:30	NEWS						
22:00	MOVIES	SPANISH FICTION	SPANISH FICTION	FICTION USA	HUMOR	KIDS	HUMOR
22:30				MOVIES	SPANISH FICTION	SPANISH FICTION	FICTION USA
23:00	MOVIES	LATE SHOW (HUMOR)	LATE SHOW (HUMOR)	CURRENT AFFAIRS	GOSSIP	MOVIES	SPANISH FICTION
23:30				MOVIES		SPANISH FICTION	SPANISH FICTION
00:00	CURRENT AFFAIRS	LATE SHOW (HUMOR)	LATE SHOW (HUMOR)	LATE SHOW (HUMOR)	GOSSIP	MOVIES	INFOSHOW
00:30							
01:00	CURRENT AFFAIRS	LATE SHOW (HUMOR)	LATE SHOW (HUMOR)	LATE SHOW (HUMOR)	GOSSIP	MOVIES	INFOSHOW
01:30							
02:00	MOVIES	SPANISH FICTION	SPANISH FICTION	FICTION USA	HUMOR	KIDS	HUMOR



Antena 3's solid grid

Current leader's monotonous programming

➔ Reality shows and gossip monopolize other grids

	MON	TUE	WED	THU	FRI	SAT	SUN				
09:00	NEWS					KIDS					
09:30											
10:00											
10:30											
11:00	MAGAZINE (REALITY + GOSSIP)					ZAPPING					
11:30											
12:00											
12:30						MOVIES		MOVIES			
13:00										DIVULGATIVO	
13:30										FICTION USA	
14:00											
14:30	NEWS					MOVIES					
15:00	GOSSIP (+ REALITY)							MOVIES			
15:30											
16:00											
16:30	REALITY							MOVIES			
17:00	MAGAZINE (REALITY + GOSSIP)									MOVIES	
17:30											
18:00											
18:30	QUIZ					FICTION USA					
19:00											
19:30	NEWS					ZAPPING					
20:00											
20:30	REALITY					ZAPPING					
21:00											
21:30	REALITY					ZAPPING					
22:00								SPANISH FICTION		SPANISH FICTION	
22:30	SPANISH FICTION		SPANISH FICTION		REALITY						
23:00	SPANISH FICTION		SPANISH FICTION		REALITY						
23:30	SPANISH FICTION		SPANISH FICTION		REALITY						
00:00	SPANISH FICTION		SPANISH FICTION		REALITY						
00:30	SPANISH FICTION		SPANISH FICTION		REALITY						
01:00	LATE SHOW (REALITY + GOSSIP)					GOSSIP (+ REALITY)					
01:30								REALITY + GOSSIP		REALITY	
02:00								REALITY + GOSSIP		REALITY	
02:30								REALITY + GOSSIP		REALITY	



The Pillars of Antena 3's Success



**Leadership
in news**

**Stability in
Daytime**

**Strength in
Prime time**

Most widely known TV news

→ Leadership in news

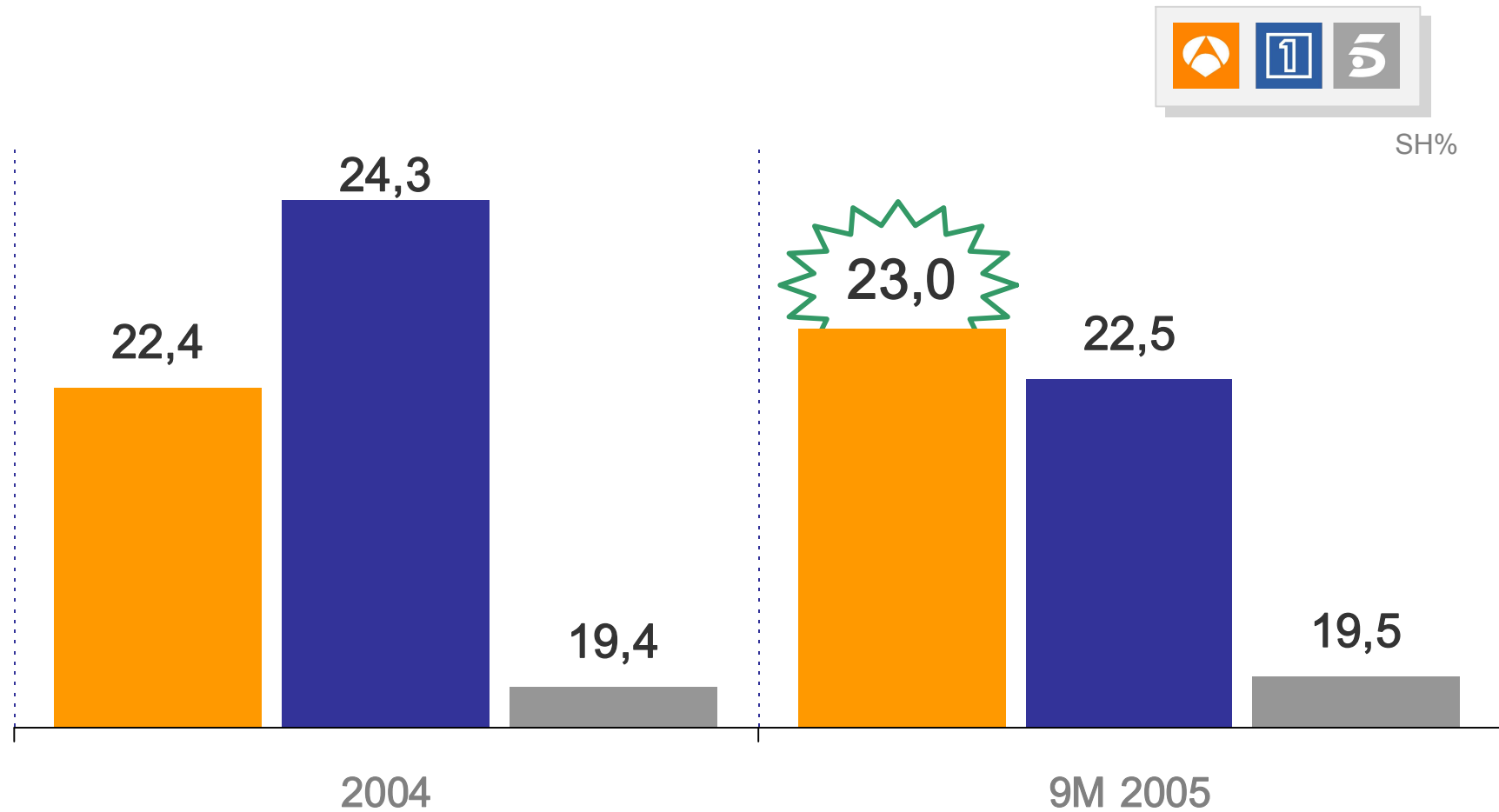
- ✓ **Historic**
- ✓ **Strategic**
- ✓ **Valuable**



Most widely known TV news

Historic leadership

→ From leader in private television to overall leader

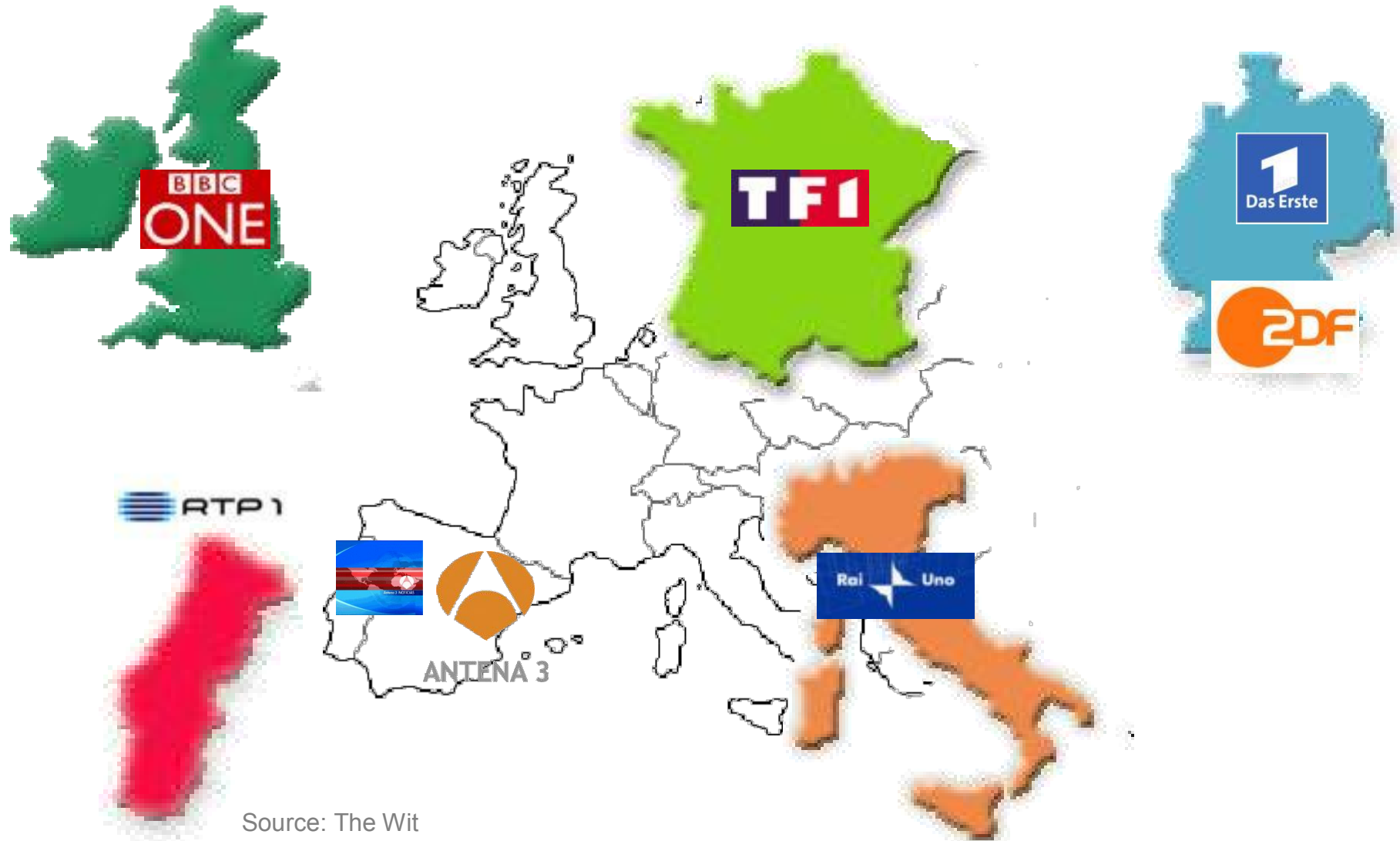


Source: Sofres A.M. 9M: January -September

Most widely known TV news

Leading news channels by country

→ Also unique in Europe



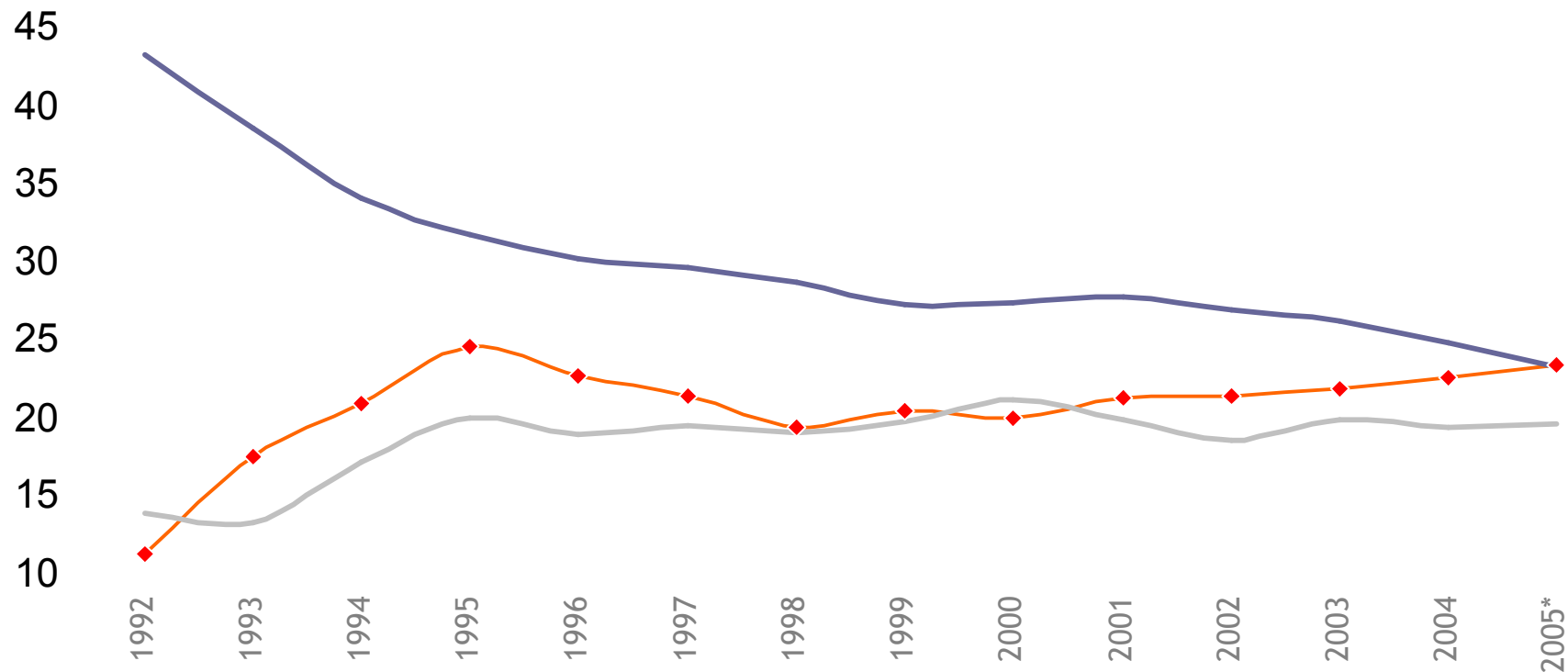
Most widely known TV news

The public channel has lost the leadership in news

➔ A habit forged year after year



SHARE%



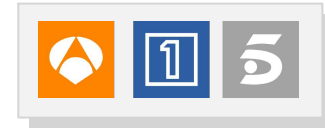
Annual news performance Mon-Fri

Source: Sofres A.M. * 2005: until 25 October

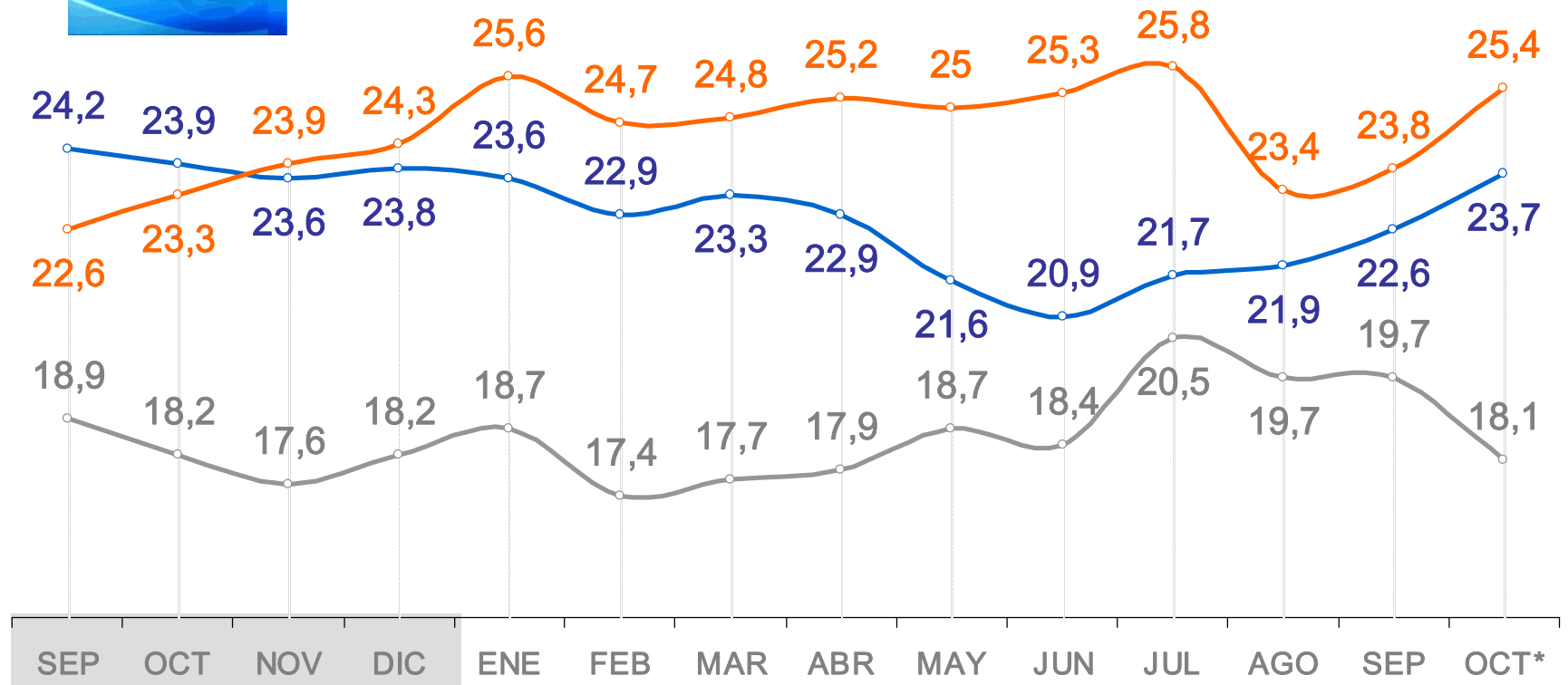
Most widely known TV news

Strategic leadership

➔ A year of leadership in Prime Time news



SHARE%



2004

2005

Source: Sofres A.M. Oct'05: until 25

Most widely known TV news

Valuable leadership

→ The most valued professional in Spanish television



- ✓ Experience
- ✓ Credibility
- ✓ Trust
- ✓ Familiar
- ✓ Popularity



- ✓ Most valued
- ✓ Objective
- ✓ Most prestigious
- ✓ Quality professionals

Sources

TNS: Quantitative news survey July'05

GECA: Índice de imagen GECA 2005

The Pillars of Antena 3's Success



Leadership
in news

Stability in
Daytime

Strength in
Prime time

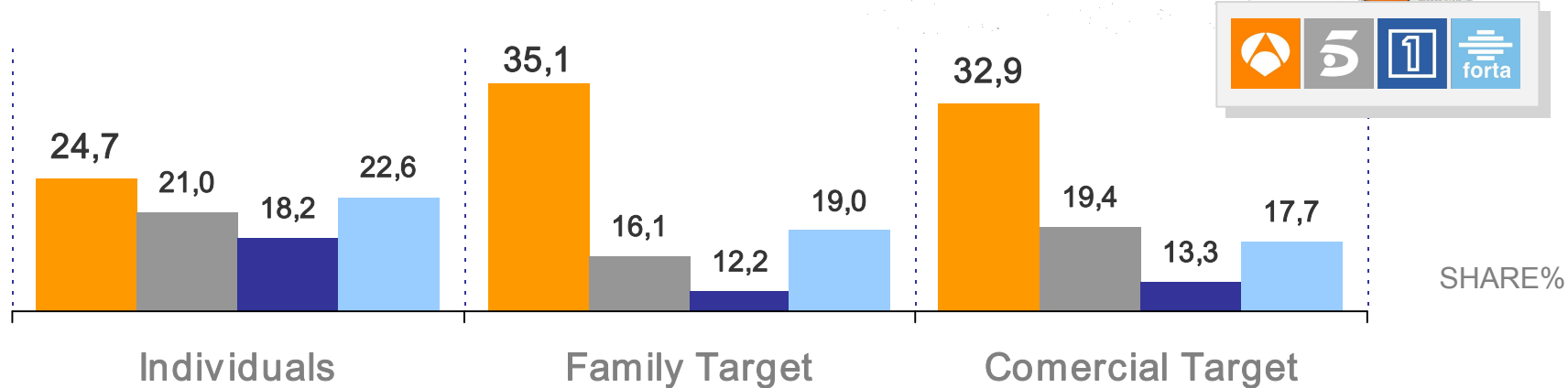
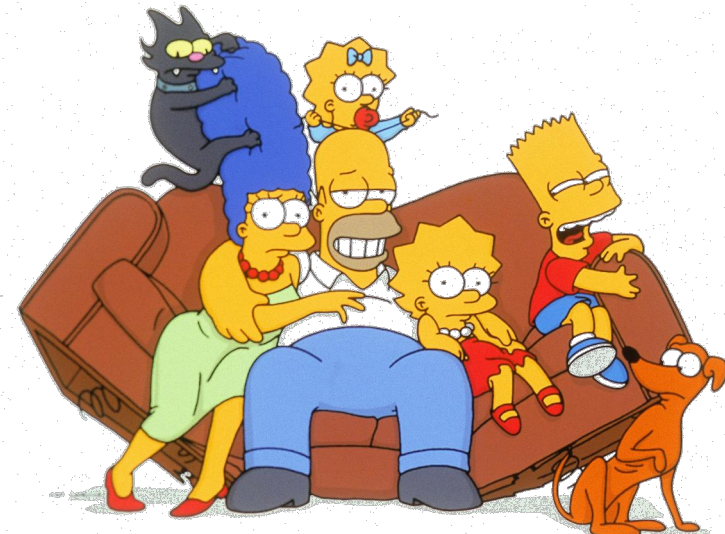
Stability in daytime

Strength in important consumer time slots

→ Quintessential family product



- ✓ Leader with the family
- ✓ Humour and transgression



Source: Sofres A.M.

2005: until 25 October

Commercial Target: Individuals 13-54 / All social classes except Lower/ +10.000 inhabitants

Family Target: Individuals <54 in homes of 3 or more individuals

Reshaping the afternoon

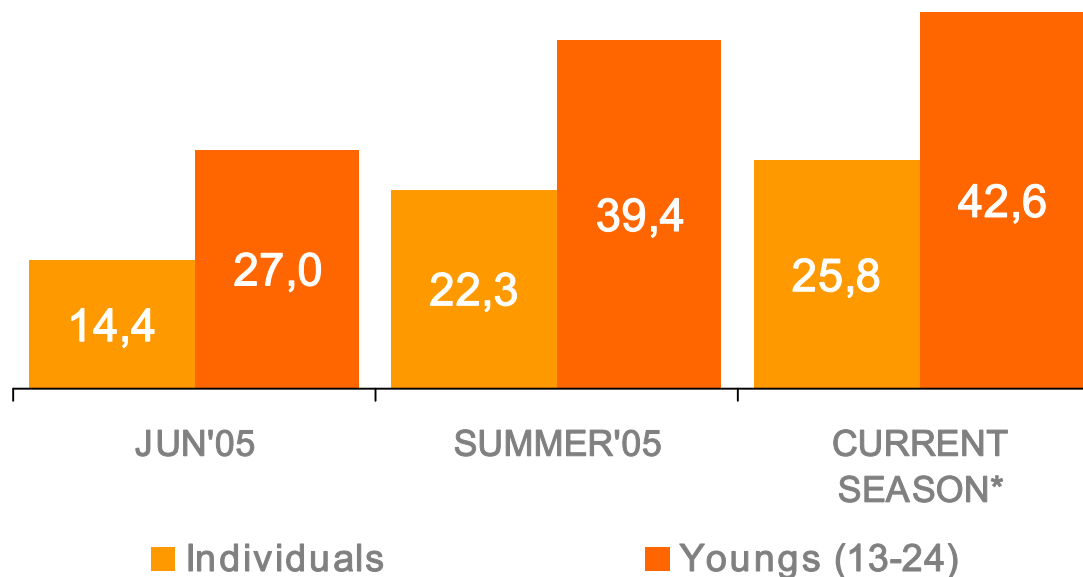
Growing performance since its premier

➔ The most highly recognised soap opera in Spain



- ✓ Spectacular growth
- ✓ Attractive for young people

SHARE%



Source: Sofres A.M. Summer'05: July & August / *Current Season: September- 25 October

Reshaping the afternoon

More than just a soap opera

20/08/2005

→ A social and economic phenomenon



Expansión

EL NEGOCIO DE LAS TELENOVELAS MUEVE 2.500 MILLONES DE EUROS AL AÑO

'Pasión de Gavilanes' cautiva a la audiencia española

La telenovela colombiana consigue un 26% de cuota de audiencia y ayuda a Antena 3 a superar a Telecinco y situarse como cadena líder este verano.

...más rentable que las grandes audiencias en producciones más caras, y esto es lo que suele suceder con este tipo de género. Con respecto a esta nueva fiebre del culebrón, para Cortés la telenovela "no es que haya renacido, sino que nunca ha muerto".

La renovación del género

Otro de los tópicos con los que ha acabado la emisión de Antena 3 ha sido el del tipo de audiencia. El tradicio-

cultural, escaso poder adquisitivo y avanzada edad, según fuentes de Antena 3, se ha visto sustituido "por un público que tiene una media de edad de 4 a 44 años, poder adquisitivo medio-alto y cierto nivel cultural, el jamón de Jabugo del mercado publicitario". Un

hecho que se traduce en el éxito de ventas de la banda sonora original de la serie, que lleva ya dos semanas ocupando los primeros puestos de ventas de discos

