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## Analysis of the competition landscape of Philippine mass media

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DISCUSSION PAPER SERIES NO. 2024-29

# Analysis of the Competition Landscape of Philippine Mass Media

*Ramonette B. Serafica and Queen Cel A. Oren*



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# Analysis of the Competition Landscape of Philippine Mass Media

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## **Abstract**

This study examines the size and distribution of the Philippine media sector, identifies the challenges to competition and growth, and explores the impact of new technologies. A layered media model was used to map the major players, primarily in traditional media industries such as news publishing, TV broadcasting, and radio broadcasting. Concentration ratios at the national and regional levels were calculated, along with a simple and novel measure that captures diversity in media supply. The extent of market concentration in other relevant industries in the information and communication sector was also assessed.

Philippine media is predominantly privately owned. Many large media companies are owned by families, and a few are affiliated with religious institutions. The business interests of some companies extend beyond the media sector. The radio broadcasting industry is generally less concentrated compared to news publishing and TV broadcasting. The diversity of voices is relatively higher in radio broadcasting as well. Most of the other industries in the information and communication sector are highly concentrated. While consumer preference is increasingly shifting towards digital media, significant portions of the population, especially outside NCR, still lack access to the internet, particularly fixed broadband.

To foster media industry growth, the government should reduce policy and regulatory barriers to entry and expansion and ensure the sustainability of media organizations, especially those that serve local communities or engage in public interest journalism. Other critical factors, such as internet connectivity and literacy, that complement the development of the media sector must also be strengthened.

**Keywords:** media, competition, ownership, concentration, diversity

## Table of Contents

<b>1</b>	<b>Introduction.....</b>	<b>1</b>
1.1	Policy context and objectives .....	1
1.2	Conceptual framework and methodology .....	2
1.3	Review of related literature .....	6
<b>2</b>	<b>Overview of the Philippine media market.....</b>	<b>12</b>
2.1	Regulations on market entry in mass media.....	12
2.2	Market trends.....	14
<b>3</b>	<b>Ownership and concentration of the mass media market .....</b>	<b>20</b>
3.1	Media ownership in the Philippines .....	20
3.2	Concentration and market power in Philippine media.....	23
<b>4</b>	<b>Current challenges and opportunities.....</b>	<b>48</b>
4.1	Industry restructuring .....	48
4.2	Insights from industry.....	50
<b>5</b>	<b>Conclusion .....</b>	<b>53</b>
<b>6</b>	<b>References .....</b>	<b>56</b>
<b>7</b>	<b>Annex 1. Layer 1 and 2 of the Media Model: Media Companies .....</b>	<b>60</b>

## List of Tables

Table 1. Media marketplace in 1970s and 1980s .....	3
Table 2. The Media and Entertainment Value Map .....	4
Table 3. Risks to Media Plurality in the Philippines (2023) .....	10
Table 4. Communications, media and internet concentration in India 2019-2021 .....	11
Table 5. Proportion of population 10 to 64 years old by frequency of exposure to various forms of mass media, Philippines: 2019 (in percent) .....	14
Table 6. Publishing of newspapers, journals and periodicals (J58130), 2021 .....	23
Table 7. Radio broadcasting and relay station and studios (J60101), 2021 .....	24
Table 8. Television broadcasting and relay stations and studios (J60201), 2021 .....	25
Table 9. Wired internet access service activities (e.g., DSL, leased line, dial-up) (J61102), 2021.....	26
Table 10. Wireless internet access service activities (e.g., Internet Service Provider, broadband) (J61203), 2021 .....	27
Table 11. Other wireless telecommunications services .....	28
Table 12. Internet access in facilities open to the public service activities (J61902), 2021 ..	30
Table 13. MOCDI for selected subclasses (2013, 2017, and 2021).....	46
Table 14. Market concentration of selected subclasses at the national level (2021).....	47
Table 15. ABS-CBN Corporation (1946)/Lopez (70%), PCD Nominee Corp. (26%), ABS-CBN employees (0.25%).....	60
Table 16. Cignal TV Inc./MediaQuest Holdings, Inc. (1999) .....	61
Table 17. Philstar Media Group/Pangilinan (?%), Belmonte (20%).....	61
Table 18. TV5 Network Inc./MediaQuest Holdings, Inc. (1999) .....	61
Table 19. GMA Network, Inc. (1950)/Gozon (30%), Jimenez (27%), Duavit (16%) .....	62
Table 20. Brigada Mass Media Corporation (2010)/Catulpos (99.98%).....	63
Table 21. Eagle Broadcasting Corporation (1968)/INC (100%) .....	63
Table 22. Far East Broadcasting Company (Philippines), Inc. (1946)/ Castillo (?).....	64
Table 23. Inquirer Holdings, Inc./Rufino-Prieto (100%).....	64
Table 24. Interactive Broadcast Media, Inc. (1994)/Canoy (99.9%).....	65
Table 25. Manila Bulletin Publishing Corporation/Yap (78%), Menzi Trust Fund, Inc. (8%), PCD Nominee Corporation (5%) .....	65
Table 26. The Manila Times Publishing Corporation (1898)/Ang (100%) .....	65
Table 27. MBC Media Group (1946)/Elizalde (90%), Ortillo (8%), PCD Nominee Corporation (0.51%) .....	65
Table 28. Nine Media Corporation*/Nicolas-Suchianco (100%).....	66
Table 29. Prage Management Corporation (2018)/Cabacungan (50%), Marfil (50%).....	67
Table 30. Presidential Communications Office/OP .....	67
Table 31. Progressive Broadcasting Corporation (1986)/Henares (61%), Communication Trend Gateway, Inc. (24.5%), Communication Headway Unlimited Inc. (14.50%).....	67
Table 32. Radio Mindanao Network, Inc. (RMN) (1961)/Canoy (87%) .....	67
Table 33. Radio Veritas Global Broadcasting System, Inc. (1987)/The Catholic Church through the Archdiocese of Manila (75%), Gonzalez (13%), Cojuangco (12%) .....	68
Table 34. Rappler Holdings Corporation (2011)/Bitanga (31%), Ressa (24%), So (18%)....	68
Table 35. Sison's Publishing House, Inc./Sison (100%) .....	68
Table 36. SunStar Publishing, Inc. (1996)/Garcia (70%), Gaisano (23%).....	68
Table 37. Swara Sug Media Corporation (1992)/Quiboloy (?).....	68
Table 38. ZOE Broadcasting Network, Inc. (1992)/Villanueva (92.5%).....	69

## List of Figures

Figure 1. Revenue of the media market in the Philippines from 2020 to 2029 (in million U.S. dollars).....	15
Figure 2. Revenue of the digital media market in the Philippines from 2017 to 2027 (in million U.S. dollars).....	15
Figure 3. Average daily time spent using various media and devices in the Philippines as of 3rd quarter 2023, by activity (in hours).....	16
Figure 4. Leading social media platforms used each month by internet users in the Philippines as of the 3rd quarter of 2023.....	16
Figure 5. Distribution of advertising spending in the Philippines in 2023, by media .....	17
Figure 6. Sources of news in the Philippines in 2024, by channel .....	17
Figure 7. Online: Weekly news reach of online media channels Philippines 2024.....	18
Figure 8. Social media: Leading social media and messaging platforms for consuming news in the Philippines in 2024 .....	18
Figure 9. Television: Audience share (Urban national from January to December 2023) ....	19
Figure 10. Print: Nationwide Readership % (Q2, 2023).....	19
Figure 11. Layer 1 and 2 of the Media Model: Media Companies.....	22
Figure 12. National Capital Region: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021) .....	31
Figure 13. Region I: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	32
Figure 14. Region II: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	33
Figure 15. Region III: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	33
Figure 16. Region IV-A: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	34
Figure 17. Region V: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	35
Figure 18. Region VI: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	36
Figure 19. Region VII: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	36
Figure 20. Region VIII: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	37
Figure 21. Region IX: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	38
Figure 22. Region X: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	39
Figure 23. Region XI: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	40
Figure 24. Region XII: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	41

Figure 25. Cordillera Administrative Region (CAR): Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021) .....	42
Figure 26. BARMM: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	43
Figure 27. Region XIII (Caraga): Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	44
Figure 28. Region IV-B: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021).....	45



# Analysis of the Competition Landscape of Philippine Mass Media

*Ramonette B. Serafica and Queen Cel A. Oren\**

## 1 Introduction

### 1.1 Policy context and objectives

Mass media is defined as “a medium of communication (such as newspapers, magazines, posters, signs, brochures and flyers, television, radio, movies, plays and similar shows, internet/e-mail, Facebook, Twitter, etc.) that is designed to reach the mass of the people” (PSA 2021, p. 27). As an industry, Information and Publishing accounted for only 0.25% of GDP and less than 1% of total employment in 2023.<sup>1</sup> However, because it serves as the primary means of communication used to reach the public, mass media plays a profound role in society and in economic life. For example, consumer preferences are influenced by what we read, watch, or hear. Mass media acts as a channel through which market information are transmitted and is important to the diffusion of knowledge.

The media is a key institution in society that can either support or impede the development of markets (Banerji et al. 2002). Media supports market transactions by acting as a channel to disseminate information about market conditions, products, and participants. It can influence how information and knowledge are produced, collected, analyzed, verified, and distributed, but it can also distort and obstruct information flows and the diffusion of knowledge. This applies not only to economic markets or commercial activities, but also to political markets, by providing citizens with information about their government and its representatives, and by establishing a platform where diverse perspectives on governance and reform can be expressed. Thus, media do not only facilitate participation in economic markets but in governance as well. Mass media can also be instrumental in promoting health and education programs especially in underserved areas.

The effectiveness of media as a tool for economic development depends on three elements that are vital for reducing the asymmetry of information: independence, quality, and reach. These elements, in turn, are influenced by a variety of factors. Independence can be affected by the nature of ownership, a lack of financial autonomy, and various media regulations (e.g., licensing, content laws, and defamation and insult laws). Weak competition, inadequate capacities of journalists, and difficulty in accessing public information can have a negative impact on quality. The reach of media can be constrained by high barriers to entry and expansion, as well as low levels of literacy and lack of access to technology (Islam 2002, Banerji et al. 2002).

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<sup>1</sup> Section J. Information and communication accounted for 3.02% of GDP in 2023. It is composed of two subsections. The subsection Information and Publishing includes Division 58. publishing activities; Division 59. motion picture, video and television programme production, sound recording and music publishing activities; and Division 60. programming and broadcasting activities. The other subsection Communication accounted for 2.77% (PSA 2024a). The share of Section J in total employment in 2023 was 1% (PSA 2024b).

Mass media is undergoing significant transformation due to the rise of digital technologies. The convergence of previously separate forms of media such as books, radio, television, and cinema has been made possible by digitalization. Media convergence and other advances in communications and computing technology have enabled the widespread and instantaneous transmission of different kinds of content. New technologies such as generative AI and immersive technologies are also disrupting other components of the media sector value chain from content creation to consumption. Social media platforms too, acting as aggregators of the vast amount of content produced by their users, are able to influence the type of content that gets created and consumed (Aridor et al. 2024).

The media industry is part of the services sector and Chapter 7 of the PDP 2023-2028 (NEDA 2022) is focused on reinvigorating services, including the creative industries. Moreover, a cross-cutting strategy in Chapter 10 of the PDP 2023-2028 (NEDA 2022) is to promote competition and improve regulatory efficiency in and through the internet and digital technologies. Monitoring and understanding emerging technologies, markets, and business models can help the government in crafting appropriate policies and regulations. The PIDS Research Agenda 2020-2025 (PIDS 2019) also recognized the intersection of competition policy and technological changes that alter the industry landscape as a relevant area of study.

The main objective of the study is to examine the changing competition landscape of mass media in the Philippines. Specifically, it will (1) Assess the size and distribution of the Philippine media sector; (2) Identify the challenges to competition and growth; and (3) Understand how technological change is disrupting the media sector. It builds on previous PIDS research that examined competition issues along the internet (digital sector) value chain, which focused on the internet access connectivity segment (Serafica and Oren 2022).

## **1.2 Conceptual framework and methodology**

### **1.2.1 The media sector value chain**

Thierer and Eskelen (2008) developed the “4-Layer Media Model” to analyze the evolution of the media marketplace in the United States. Based on the concept of a value chain, the model is composed of the following key elements (p.14):

**Layer 1:** Product or content options: Who creates media content? What media content is available for citizens to consume?

**Layer 2:** Distribution mechanisms: Who delivers media content? How is it distributed to the viewing and listening public?

**Layer 3:** Receiving or display devices: How is media content received (seen and heard) by consumers?

**Layer 4:** Personal storage options: How do citizens retain media content?

The model is useful in understanding the developments in the entire media sector or individual segments. The evolution of the media marketplace from 1970s to the 1980s is depicted in Table 1. Apart from the changes within the individual industries (e.g. the addition of mobile devices in the distribution and display of news), new segments (i.e., video games and online content & services) emerged.

**Table 1. Media marketplace in 1970s and 1980s**

Layer 1	Layer 2	Layer 3	Layer 4
Product/Content	Distribution Mechanism	Receiving/Display Devices	Personal Storage Options
Print News & Literature	Newspaper & Magazine Delivery <i>Internet sites, Software, Mobile devices</i>	Newsprint, Books <i>PCs, Internet sites, Mobile devices &amp; PDAs</i>	Books, Personal Library <i>PDAs, Computer discs and hard drives, Online storage, Printers</i>
Television Programming <i>Video</i>	Broadcast TV Stations <i>Cable, Satellite, Internet &amp; Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P</i>	TV Sets <i>Computer monitors, Mobile devices &amp; Handheld devices</i>	None <i>PVRs (i.e. TiVo), VCRs, DVDs, Computer discs and hard drives, Online storage</i>
Movies	Cinemas, Broadcast TV <i>Cable, Satellite, Internet &amp; Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P</i>	Movie Theater <i>TV Set, Computer Monitor, Personal Digital Devices</i>	None <i>VCRs, DVDs, Computer discs and hard drives, Online storage</i>
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	Radios, Stereos	None
Music <b>Audio</b>	Radio, Records, Tapes <i>Broadcast Radio, Satellite Radio, Internet Sites &amp; Online Stores, Podcasts, P2P</i>	Radio, Reel-to-reel tape decks, Stereos <i>Home &amp; car radios, Stereos, iPods, MP3 Players &amp; other personal digital devices, websites</i>	Records and tapes <i>CDs, Tapes, Personal digital devices, Computer discs and hard drives, Online Storage</i>
Advertising	TV, Radio, Mail, Magazines <i>Cable, Satellite, Mobile devices &amp; PDAs, E-mail</i>	All of the above <i>Almost anything</i>	Rarely stored <i>Rarely stored</i>
Telecommunications	Phone Networks <i>Mobile Networks, Cable Networks, Internet Telephony (VOIP), IM</i>	Telephones <i>Cell phones, PDAs, VOIP, Online chat</i>	None <i>Voice Mail, Online services</i>
Photography	Cameras <i>Digital cameras, Camcorders, Mobile devices &amp; PDAs, Internet &amp; Online Stores</i>	Print film <i>Computers, TV set, Mobile devices &amp; PDAs</i>	Film/Prints <i>CDs/DVDs, Memory cards, Computer discs and hard drives, Online storage, Printers</i>
<i>Online Content &amp; Services</i>	<i>Phone, cable &amp; wireless networks, IM, Portals, Blogs, Search Engines, Social Network Sites, RSS aggregators</i>	<i>Computer Monitor, PDAs, Cell Phones, TV Sets</i>	<i>Computer discs and hard drives, online storage, Personal digital devices</i>
<i>Video Games</i>	<i>Video game platforms, Discs, Computer software, Internet &amp; Online stores, Mobile networks</i>	<i>TV Sets &amp; computer monitors, Handheld gaming units, Mobile devices &amp; PDAs</i>	<i>CDs/DVDs, Computer discs and hard drives</i>

Note: Bold and italicized text refer to industries or segments which emerged in the 1980s

Source: Thierer and Eskelen (2008, p. 15)

With advancements in digital technologies, the media sector today and ICT more broadly have become more integrated enabling different forms of convergence, such as **service convergence**

(when multiple services are provided using the same network instead of separate networks) and **technological convergence** (when a single device performs different functions and delivers various content formats) (Singh and Raja (2010); Park (2019); Serafica and Oren (2024)). By removing the technical boundaries between previously separate media, digitalization has enabled **media convergence** (Godula and Böhm 2023). In recent years, due largely to the impact of the pandemic, the preference for consuming content has shifted with digital channels overtaking traditional distribution modes. WEF (2020) developed a media value web with three components - content creation, distribution, and consumption (Table 2).

**Table 2. The Media and Entertainment Value Map**

<b>Content creation</b> Production and programming of content across all mediums	<b>Distribution</b> Distribution of content and information, representing final touchpoint with the end user	<b>Consumption</b> Engagement with and consumption of content
Music (e.g. artists, labels), spoken word (e.g. podcast), performance art (theater, troupes), sports (e.g. leagues), studios (e.g. film, game development), education and public sector (e.g. lectures), news (e.g. journalists), advertisers (e.g. brands, ad agencies), programming (e.g. TV networks), written word (e.g. novelists), and amateur creators (e.g. consumer creations)	Print (e.g. newspaper), broadcasters (e.g. linear TV, radio), digital direct to consumer (D2C) (e.g. streaming platforms, independent blogs, social media (e.g. Facebook, TikTok), gaming (e.g. consoles, publishing), in-person (e.g. arenas, cinemas)	Usage by demographic (e.g. age, region, income level) and format (e.g. device, medium)

Note: List under each component is not exhaustive.

Source: WEF (2020)

Media is also linked to other services and the broader digital sector value web<sup>2</sup>. The digital supply chain consists of content in the form of audio-visual services, design, and knowledge-capturing products; transmission networks carrying content; management of digital rights; and delivery of content. Telecommunications and broadcasting serve as channels for delivering content. Information and computer services offer information storage, processing, network management, and over-the-top services that complement or compete with telecommunications and broadcasting services (OECD 2017).

### 1.2.2 Measuring market power and concentration in the media sector

According to Grönlund and Björkroth (2022), the concept of ‘media ownership’ can be analyzed and evaluated in a variety of ways. One way is to look at the markets covered: within the same market (horizontal ownership), across different stages of the media production and distribution (vertical ownership), or cross-ownership of different media enterprises (diagonal ownership). Another approach is to look at ownership arrangements, for example, by the state, a family, a party, a trust, or a corporation. In general, various forms of ownership are associated with different control systems and social outcomes. The following are three of the key

<sup>2</sup> See Serafica and Oren (2022) for more information on the digital sector value chain

measures of market power and concentration that have been applied in the media sector (Grönlund and Björkroth 2022; Noam and The International Media Concentration Collaboration 2016):

### **n-Firm Ratios (CRn)**

A commonly used method to measure ownership concentration is to take the share held by the largest shareholder. To illustrate the structure of a market, we may use the n-firm ratio (CRn), which denotes the sum of n-largest firms' market shares. Here n takes discrete values, such as CR1, CR2, CR3, CR4, CR8, for example. CR4 and CR8 ratios are used to analyze market concentration within media industries. To gain further insight into the market structure, it is common to analyze the ratios of CRNs. The CR2/CR4 ratio, for example, measures the proportion of the total market share held by the top four firms that is attributed to the two largest firms.

Concentration ratios offers a simple way of measuring market control by comparing the combined market shares of the two, four, or eight largest firms compared to the total market share of all firms within the relevant market. This approach usually relies on industrial data from geographically defined areas established by statistical authorities. Hence, it may not accurately capture the true concentration levels in the relevant market. It is not straightforward to determine the substitutability among media products and services (content or advertising markets). The same challenge applies to identifying the exact delineation of the relevant geographic market.

### **Herfindahl-Hirschman Index**

The Herfindahl-Hirschman index (HHI) is a commonly used metric for assessing market concentration and market power. Derived from economic theory, it is used as a tool in antitrust and merger analysis, as well as in various industry studies, including the study of media markets. The HHI is calculated by adding the squared market shares  $s_i$  of firms ( $i = 1, \dots, N$ ) in the market:

$$HHI = \sum_{i=1}^N s_i^2$$

For example, the HHI for three firms with market shares of 60%, 30%, and 10%, respectively, is 4,600 ( $=60^2 + 30^2 + 10^2$ ). It is practical to use HHI since it describes the market structure within the two extreme market structures. The maximum value of HHI, which is 10,000, indicates monopoly, while a perfectly competitive market would have an HHI value close to zero. Alternatively, the HHI can be expressed as ranging from 0 to 1, which for the case above translates into an HHI of 0.46 ( $=0.6^2 + 0.3^2 + 0.1^2$ ).

In this report, we will adopt a classification used in other studies where an HHI below 1,000 is considered **unconcentrated (U)**, an HHI from 1,000 to 1,800 points is considered **moderately concentrated (MC)** and markets with an HHI in excess of 1,800 points to be **highly concentrated (HC)**.

## The Media Ownership and Concentration Diversity Index (MOCDI or Noam Index)

Noam and the International Media Concentration Collaboration (2016) argue that market power alone does not accurately reflect media diversity. Another index was created that considers the number of voices in the market or editorial concentration.

Most people prefer an availability of various media outlets. The presence of alternative media market players, even small players, fosters diverse and contrasting perspectives. A market with four major and four minor firms has more voices than having four major firms, even when their market power indices are similar. Noam and the International Media Concentration Collaboration (2016) proposed that HHI be divided by the root number of voices. The Noam Index is calculated as follows:

$$MOCDI = \frac{HHI}{V} = \frac{HHI}{\sqrt{n}}$$

Although the measure is not solidly anchored in economic theory, it manages to emphasize the value of diversity in that the MOCDI underlines the importance of concentration of voices along with market concentration. Less market concentration and more diversity leads to a lower index while more market concentration and less diversity leads to a higher index.

### 1.2.3 Data collection

To review the media landscape, the research will be using both quantitative and qualitative research approach. Data will be gathered from various sources such as existing literature, survey of establishments, company reports, and government websites/documents to discuss the current landscape of mass media sector in the Philippines and issues related to competition. It will also look into the relevant policies adapted by other economies to provide additional insights.

Data from the Annual Survey of Philippine Business and Industry (ASPBI); Securities and Exchange Commission (SEC) Financial Reports; Media Ownership Monitor database; government websites, company websites, NTC reports; and Statista will be used to determine market trends and ownership patterns, and to measure concentration and market power at the national and sub-national levels. Select Key Informant Interviews (KIIs) will be conducted to augment the analysis.

## 1.3 Review of related literature

### 1.3.1 Digitalization of mass media

The advent of digitalization is blurring the distinct technical boundaries among separated media, such as telecommunications, information services, and broadcasting, where content was previously delivered via different networks. This is commonly referred to as **media convergence**. This convergence enables cross- and transmedia techniques that were not possible in the past. Telecommunications companies frequently include Internet Protocol Television (IPTV) in their bundled services, often referred to as triple play or quadruple play packages. Triple play typically combines broadband, television, and telephone services, while quadruple play adds mobile services to the package. In some instances, traditional broadcasters have transitioned into offering telecommunications services. Alongside traditional linear (or

scheduled) broadcasting, the importance of video-on-demand services has grown significantly in distributing audio-visual content (Godula and Böhm 2023; OECD 2017).

Additionally, many providers now offer streaming or downloadable content over the internet. Both Internet Protocol television (IPTV) and video-on-demand services rely on access to high-speed broadband, and their availability is influenced by the performance and regulatory framework of the telecommunications sector. Consequently, a robust IPTV and video-on-demand market drives demand for broadband internet services. Reflecting this interdependence, regulatory oversight of both telecommunications and broadcasting is often consolidated under a single regulatory body in many countries. In addition, the emergence of immersive media technologies is observed, including novel offerings based on virtual and augmented reality. While technical advancements in the media industry primarily impacted production and distribution, the integration of machine learning innovations is anticipated to shape content creation as well. Beyond its economic prospects, the utilization of artificial intelligence in media raises ethical and societal considerations (Godula and Böhm 2023; OECD 2017).

The traditional content industry value chain and associated business models are being challenged by the advent of digital disruption. In the post-World War II era of rapid economic expansion, Japanese broadcasters experienced growth through dual revenue streams: direct consumer payments and advertising income. However, the emergence of digital technology in the late 1990s resulted in widespread piracy of creative works, while the 2000s witnessed a shift in consumer preferences towards freely accessible content at their convenience and the ability to efficiently search preferred content from various sources. Concurrently, the emergence of IT platforms like Amazon and Netflix has entrenched oligopolistic positions in both the media and retail spaces, compelling traditional content industry players to explore alternative business models (Kawashima 2022).

Despite intense internal competition for market share, the overall market has expanded alongside economic growth. Nevertheless, commercial broadcasters confront three significant threats: declining television viewership, rapid growth of online video content platforms, and booming online advertising market fueled by advancements in advertising technology. The acquisition and utilization of viewing data have the potential to position television as a valuable medium for sophisticated marketing activities. Broadcasters, who have been accustomed to unidirectional content delivery and gauging audience preferences solely through viewer ratings, are now at a decisive point as to whether to transition to a data-centric business model that more accurately discerns the demands of both viewers and advertisers (Kawashima 2022).

In the context of the Norwegian media market, the adoption of broadband internet by households led to significant declines in print readership and circulation while also resulting in substantial increases in online news consumption. There was a notable shift from print to online news consumption as newspaper companies experienced a nearly 30 percent decrease in revenues. In response, these firms implemented substantial cost-cutting measures, such as reducing labor inputs or downsizing the physical dimensions of newspapers, thereby mitigating significant profit losses. Additionally, the content of printed newspapers underwent changes, with a transition from tabloid-style reporting to more serious news coverage. Nonetheless, findings indicate that the adoption of the internet played a negligible role in the decline of local newspapers, implying a more nuanced relationship between these factors. The study also observed the adaptability of newspaper companies, which may explain their resilience in the

media market. For instance, newspapers have adopted digital paywalls for online readers (Bhuller et al. 2023).

Media organizations have been innovating to take advantage of new technologies and to cope with changes in consumer behavior (EIU 2020). Technologies that are being used include cloud computing, smart phones, 5G technology, blockchain, virtual reality, augmented reality, AI and robotics (Wooten n.d., EIU 2020).<sup>3</sup> Although automation can assist a journalist in undertaking some tasks, such as searching online, collecting stories, and transcription, there is general agreement that other functions cannot be completely automated. Investigating, explaining, and providing a perspective or a point of view are vital functions of a skilled journalist (EIU 2020). According to Aridor et al. (2024), the editorial process is also lacking in social media, defined as “two-sided platforms that primarily host user-generated content distributed via algorithms, while allowing for interactions among users” (p. 2). As aggregators of large volumes of data, social media platforms determine the types of content that are produced and consumed through content moderation and algorithmic curation, respectively. Sustaining public interest journalism is at risk as well as the viability of news organizations may be affected by the market power of digital platforms and the imbalance of bargaining power between them (OECD 2021). Related concerns also include the impact on quality, misinformation, disinformation, media pluralism, and market concentration in news media. The commercial relationship between news publishers and digital platforms is quite complex due to the presence of horizontal, vertical, and diagonal relationships. The **horizontal** relationship results from their direct competition for user attention and advertising revenue. The **vertical** link derives from digital platforms' role as providers of news referral services. A **diagonal** relationship also exists as digital platforms not only distribute third-party material, but are also engaged in generating content and compete for content rights (OECD 2021).

According to the Centre for Open and Distance Learning, Tezpur University India, as cited in Ugo et al. (2023), digitalization of media has the following positive effects:

- Digital technologies facilitate interaction, linking the world through **shared virtual space**. This has led to the emergence of numerous internet-based platforms like Twitter, YouTube, Facebook, LinkedIn, and other digital channels, which enable the production, distribution, and consumption of news content worldwide.
- Facilitates two-way communication and enables **interactive programming and feedback loop** for audio-visual and auditory broadcasting platforms. Moreover, it serves as a bridge between traditional and new media, facilitating convergence among journalists in the production, dissemination, and consumption of media content.
- The convergence of traditional forms of media, such as newspapers, radio, television, and new media, has facilitated broader access to global markets. This integration has established a **wide-reaching distribution network** and opened up avenues for expansion opportunities.
- Encouraged **multimedia communication** integrating video, audio, static images, and graphics. Using web links, users can access information presented in various formats.
- Responsible for maintaining fidelity and expanding the diversity and rapidity of data transmission, alongside ensuring high-quality images and sounds.

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<sup>3</sup> Augmented reality (AR) augments your surroundings by adding digital elements to a live view, often by using the camera on a smartphone. Virtual reality (VR) is a completely immersive experience that replaces a real-life environment with a simulated one.



The rise of digital media facilitated by digitalization may significantly affect traditional media. This includes shrinking revenues, regulatory challenges, job losses, misinformation proliferation, and online shift. Nevertheless, it provided consumers with more options for media consumption and personalized content (Ugo et al. 2023; Hermanni 2023).

Understanding consumer behavior and preferences has been a significant factor for media companies to remain thriving. Some studies have shown that consumers usually do not prefer making payments for content unless they are tailored to their needs. Consumers are also unwilling to pay for platforms that offer HD programs already financed by advertising. The understanding of consumer behavior has led to an increase in e-paper circulation in recent years in Germany (Hermanni 2023). For instance, printing media companies experienced a significant decline in hardcopy newspaper readership, consequently shrinking revenue sources from advertising due to the migration of consumers to the Internet for information and entertainment content (Ugo et al. 2023; Bhuller et al. 2023). However, other companies have adopted digitalization to thrive. For example, Bertelsmann, a big media company in Germany, focused on diversifying its services by owning both traditional and digital media (e.g., broadcasting, streaming, and online services). Axel Springer, a printing company, transformed itself from a traditional publishing company to providing editorial offerings and acquiring other reputed brands to become an international brand. Another media company, DuMont, somewhat acts like a software company providing business information and marketing technology for other businesses and entities. Some opted for collaboration with companies complementing each other. For instance, the media alliance of broadcasting company RTL formed an alliance with magazine publisher Gruner + Jahr to compete with Netflix, Disney, and Google (Hermanni, 2023, p. 21).

Comparing audiovisual media markets, TV, YouTube, and Netflix seem competitive. Consumers' preference depends on the age of viewers, purpose of use, and time of the day. Younger audiences prefer video on demand (VoD), while older age groups prefer television (TV). Viewers prefer Premium video on demand (PVoD), particularly Netflix, for viewing serial content, while they prefer TV for watching sports and news. TV and Netflix are preferred for viewing longer video content, while YouTube (an advertising-based video on demand or AVoD) is preferred as a source of knowledge, research, and motivation. While the preference to watch PVoD in the afternoon increases the probability of watching AVoD, all three services are competitive for prime-time consumption (Ugo et al. 2023).

Aleesha (2010), as cited in Ugo et al. (2023), suggested models that can be used by traditional media to harness digital disruptions:

- Utilize hybrid models – create digital platforms that provide various choices and utilize data analysis to understand consumer behavior
- Produce more digital news – offer digital news content and integrate e-commerce
- Optimize unique content creation – provide personalized content for specific audiences to cushion information overload
- Offer vertical news – bring in specialists to engage viewers in different issues
- Collaborate with technology firms – adopt new technologies to improve content, distribution, and engagement
- Encourage diversification of revenue streams – generate revenue from other sources such as subscriptions, events, and partnerships to alleviate the shrinking revenue generated from advertising.

The high market dynamics will continue to bring about a convergence of services in the media sector and the attempt to provide a one-stop shop of services or integrated offerings, as evidently seen in YouTube having developed features such as stories like Instagram, video rental like Amazon, and premium subscription like Netflix, which could change the competition among media services (Ugo et al. 2023).

### 1.3.2 Analysis of competition in the media sector

One of the earlier cross-country studies examined ownership patterns in almost 100 countries and found large shareholdings of governments or private families (Djankov et al. 2003). Ownership by families is consistent with the concept of “**amenity potential**” whereby non-financial benefits (e.g. political influence, fame) are associated with media ownership and control (Demsetz 1989 and Demsetz and Lehn 1985 as cited in Djankov et al. 2003, p. 373). Another study focused on market concentration in media (Noam and The International Media Concentration Collaboration 2016). Apart from the usual economic measures such as the HHI and concentration ratios, a measure of diversity or pluralism was also adopted. Known as the Media Ownership Concentration and Diversity Index (MOCDI), it takes into account the regular HHI for market power as well as the number of players (or voices) in the media market. The index increases with more market concentration and with less diversity, and decreases with less concentration and more diversity.

Interest in media ownership has not waned through the years, and a trend toward increased concentration of media ownership is a growing concern globally (Grönlund and Björkroth 2022). Different monitoring mechanisms are available today that look at ownership and concentration in the media sector.

#### **Media Ownership Monitoring System (<https://www.mom-gmr.org/>)**

The Media Ownership Monitor is a global research and advocacy initiative that espouses media pluralism. Internal media pluralism focuses on representation of different social and political groups in media content while external media pluralism looks at the supply-side in terms of the number and structure of owners. Media market concentration can arise from media ownership concentration, media content concentration, and media audience concentration.

The Media Ownership Monitor does not prescribe a specific form of ownership or market structure but rather provides a tool to promote transparency and good governance. Table 3 below shows the 2023 assessment for the Philippines (VERA Files 2024). Note that **media market concentration** was not included due to lack of data.

**Table 3. Risks to Media Plurality in the Philippines (2023)**

High risk	Medium risk	Low risk
<ul style="list-style-type: none"> <li>Media audience concentration</li> <li>Regulatory safeguards against horizontal concentration of ownership and/or control</li> <li>Cross-media ownership concentration</li> </ul>	<ul style="list-style-type: none"> <li>Ownership transparency</li> <li>State control of media resources</li> <li>Gender imbalance in the media industry</li> </ul>	Political control over infrastructure

<ul style="list-style-type: none"> <li>• Regulatory safeguards against cross-ownership concentration</li> <li>• Regulatory safeguards against ownership transparency</li> <li>• Political Control Over Media Outlets</li> <li>• Regulatory safeguards against net neutrality</li> </ul>		
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Source: VERA Files (2024)

### **Global Media and Internet Concentration Project (<https://gmcp.org/>)**

The Global Media and Internet Concentration Project (GMICP) evaluates traditional and digital media industries to determine changes in market concentration over time. It currently covers two dozen communication, Internet and media markets in almost 40 countries. To ensure comparability across countries and over time, the three concentration measures adopted are the Concentration Ratios (CR), the Herfindahl-Hirschman Index (HHI) and the Noam Index (NI).

The increasing integration of the Indian media economy due to rapid digitisation and the dominant role of mobile internet was highlighted in Athique, et al. (2024). The **telecoms and internet infrastructure** sectors were found to be highly concentrated and extreme concentration also characterized **core internet services**. The **audiovisual media content** sectors were highly competitive as evidenced by the low levels of concentration although distribution networks across all media formats may become concentrated due digitization. In **newspapers print**, there was a significant decline in advertising revenues especially among larger newsgroups which has led to lower levels of concentration. For the **total network media economy**, there was rapid shift from moderate to high levels of concentration in recent years as a result of digitalization. See Table 4.

Overall, India's media economy was deemed more highly concentrated compared to other GMICP countries. The authors point out, however, that, while the analysis is conducted on a national basis, media content markets in India are primarily influenced by regional language markets. There is also a divide in media markets between a small group of high-value audiences that consume a full range of media services and mass audiences that rely on free access and content services. Thus, for each sector, the levels and dynamics of concentration would differ across market segments.

**Table 4. Communications, media and internet concentration in India 2019-2021**

Industry	2021 Revenue	Revenue Growth 2019-2021	2021 Pooled Average Concentration Ratio
Telecoms and Internet Infrastructure	US\$ 49.22bn	+23%	HHI - 2877.7 CR4 - 93.5%
Core Internet Services	\$US 3.38bn	+122%	HHI - 6343.8 CR4 - 91.6%
Audiovisual Media Content	US\$ 12.38bn	+22.5%	HHI - 345 CR4 - 31.1%

Newspapers Print	\$US 1.54bn (10 leading firms)	-32%	HHI - 207.9 CR4 - 28.6%
Total Network Media Economy	US\$ 66.52bn	+21%	HHI - 1663 CR4 - 70.1%

Source: Athique, et al. (2024)

### ***Centre for Media Pluralism and Media Freedom (<https://cmpf.eui.eu/>)***

The Centre for Media Pluralism and Media Freedom (CMPF) produces the **Media Pluralism Monitor**, which covers EU member states and candidate countries. It is a tool for analyzing the levels of plurality in media systems in a democratic society based on legal, political, and economic variables. One component, Market Plurality, considers the economic dimension of media pluralism. Risks to market plurality may arise from a lack of transparency in media ownership; high concentration of markets, both in production and distribution; the poor economic sustainability of the media business; and from the influence of commercial interests and ownership on editorial content.

According to the 2024 report 'Monitoring Media Pluralism in the Digital Era' (Bleyer-Simon et al. 2024), three indicators are at **high risk**, namely: plurality of media providers, plurality in digital markets, and editorial independence from commercial and owners influence. Moreover, the assessment indicates that the concentration of the digital gatekeepers exceeds the concentration of the media providers. Indicators that are at **medium risk** include transparency of media ownership and media viability. The risks are evaluated taking into account the legal framework and its effectiveness, quantitative variables (e.g., top 4 index for market and audience concentration, revenues, and employment data), and horizontal and cross-media ownership.

## **2 Overview of the Philippine media market**

### **2.1 Regulations on market entry in mass media**

Ownership of mass media is restricted to Filipino nationals, while advertising allows up to 30 percent foreign ownership.

#### Article XVI. General Provisions

Section 11. (1) The ownership and management of mass media shall be limited to citizens of the Philippines, or to corporations, cooperatives or associations, wholly-owned and managed by such citizens.

The Congress shall regulate or prohibit monopolies in commercial mass media when the public interest so requires. No combinations in restraint of trade or unfair competition therein shall be allowed.

(2) The advertising industry is impressed with public interest, and shall be regulated by law for the protection of consumers and the promotion of the general welfare.

Only Filipino citizens or corporations or associations at least seventy per centum of the capital of which is owned by such citizens shall be allowed to engage in the advertising industry.

The participation of foreign investors in the governing body of entities in such industry shall be limited to their proportionate share in the capital thereof, and all the executive and managing officers of such entities must be citizens of the Philippines.

In contrast to the strict control of the mass media, Article XVI. General Provisions promotes balanced flow of information:

Section 10. The State shall provide the policy environment for the full development of Filipino capability and the emergence of communication structures suitable to the needs and aspirations of the nation and the balanced flow of information into, out of, and across the country, in accordance with a policy that respects the freedom of speech and of the press.

Desierto (2009) notes that the foreign ownership restriction in Philippine mass media has nothing to do with the national economy and patrimony (Art. XII) but rather part of General Provisions (Art. XVI) which also includes other matters such as the Philippine flag; the national name, anthem, and seal; suits against the State; and others. Mass media ownership and management restrictions were first enshrined in the 1972 Constitution (Art. XV. General Provisions. Sec.7). According to Presidential Decree No 1018 of 1976 (Limiting the Ownership and Management of Mass Media to Citizens of the Philippines and for Other Purposes) the term ‘mass media’ refers to the print medium of communication, which includes all newspapers, periodicals, magazines, journals, and publications and all advertising therein, and billboards, neon signs and the like, and the broadcast medium of communication, which includes radio and television broadcasting in all their aspects and all other cinematographic or radio promotions and advertising” (Sec. 1). Additionally, “any person who publishes a newspaper, magazine, periodical or other publication abroad and desires to circulate it in the Philippines shall do so through a Filipino citizen or a firm or association wholly owned or controlled by citizens of the Philippines...” (Sec. 4). A Memorandum issued by the Executive Secretary on Sept 5, 1994 further clarifies that the recording business, is not considered part of mass media within the purview of Art. XVI of the 1987 Constitution.

Today, foreign ownership limitations have been extended to digital media as well. The Securities and Exchange Commission (SEC) has issued various legal opinions that digital platforms that disseminate information may be considered mass media, even if the platforms do not have editorial control over the material (Serzo 2021, See also Barcenas 2019). According to Serzo (2021), the SEC gave a broad definition to “mass media” as platforms that “communicate to the public”, which essentially renders all websites and online platforms posting content related to third parties as mass media. Thus, full nationalization should apply to them. With the exception of one case in 2018, digital platforms continue to operate and have not faced any legal action for violating the foreign equity rule (Serzo 2021).

The Radio Control Act requires a congressional franchise to operate a radio station and the Supreme Court has ruled that the same is required to operate a television station (Teodoro and Kabatay 2006). A company that has obtained a legislative franchise for telecommunications must have a separate franchise to engage in broadcasting as an entity cannot engage in both telecommunications and broadcasting under a single franchise (RA 7925).

The term of a franchise from Congress is 25 years and can be renewed. An enfranchised broadcasting company would also have to obtain certain principal licenses from the National Telecommunications Commission (NTC) (Abot and King-Dominguez 2020). These are (a) Certificate of public convenience and necessity (CPCN) and (b) Provisional authority (PA). The application process is of a judicial nature, where an applicant files a petition for the CPCN issuance, and must prove its legal, technical and financial capability, as well as the feasibility of offering the contemplated service. The granting of a PA allows an applicant to provide the

service for at most 18 months (which can be extended) while waiting for the CPCN application to be completed. The frequency is assigned following the issuance of the PA or CPCN.

## 2.2 Market trends

In 2019, television was the most popular form of mass media in the country with 83.7 percent of Filipinos aged 10 to 64 years old using this medium either every day or at least once a week. The proportion of TV viewers was higher in the urban areas (86.5%) compared to rural areas (80.1%). After TV, accessing the Internet (social media) (58.8%) was the next most popular form of mass media. The least popular type of mass media that was seldom used or not at all was reading the newspaper (82.1%). Except for watching TV and surfing the Internet (social media), the majority of the population or more than half of Filipinos aged 10 to 64 rarely or never used the other types of mass media. See Table 5.

**Table 5. Proportion of population 10 to 64 years old by frequency of exposure to various forms of mass media, Philippines: 2019 (in percent)**

Form of Mass Media	All barangays		Urban Areas		Rural Areas	
	Every day or At least once a week	Seldom or Not at all	Every day or At least once a week	Seldom or Not at all	Every day or At least once a week	Seldom or Not at all
Newspaper	17.3	82.1	20.3	79.3	13.5	85.8
Magazines	31.6	67.8	32.0	67.6	31.1	68.1
Posters	24.0	75.4	26.1	73.4	21.2	78.0
Television	83.7	15.7	86.5	13.0	80.1	19.2
Radio	39.1	60.4	39.1	60.4	38.9	60.3
Movies	28.4	71.0	30.9	68.7	25.3	73.9
Internet (Social media)	58.8	40.7	68.9	30.7	45.8	53.5

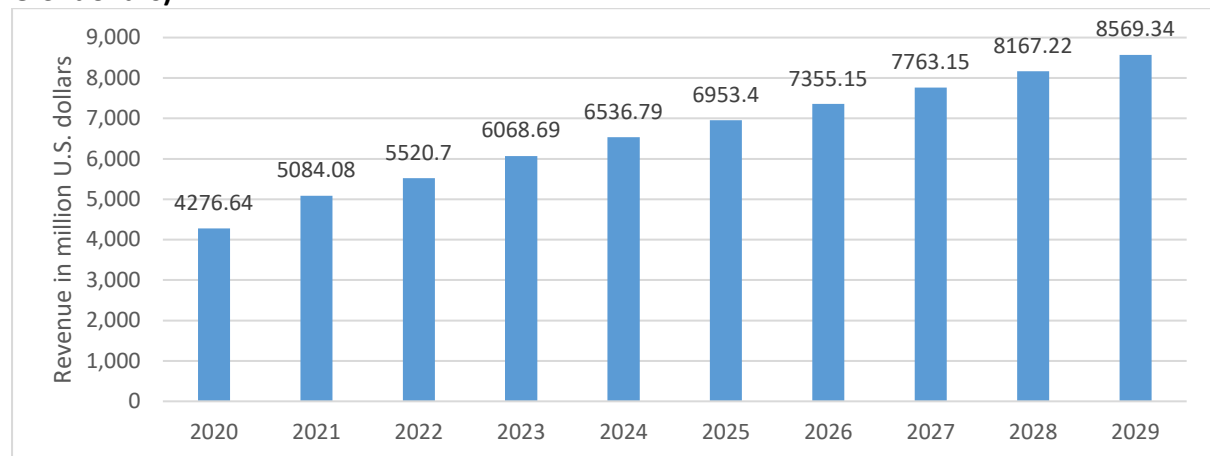
Notes: Internet (emails/research work), meetings, report/correspondence, and calculations are not included in this table.

Source: 2019 Functional Literacy, Education and Mass Media Survey (PSA 2021)

According to the survey by Statista (2024a), the Philippines' media market is estimated to have USD 6 billion in revenue in 2023 and is projected to increase to about USD 6.54 billion in 2024 (about 8% growth), as shown in Figure 1. The media market comprises both traditional media (e.g., TV, radio, print publications) and modern media (e.g., social media, websites, and streaming services). In contrast, its digital media<sup>4</sup> market subset is estimated to have a higher growth rate from 2023 to 2024. It is estimated to earn about USD 2.5 billion in 2023 and is expected to increase to USD 2.75 billion in 2024 (10% increase). The revenue in the digital media market in the Philippines was forecast to continuously increase between 2024 and 2027 by in total 611 million U.S. dollars (+22.19 percent). See Figure 2.

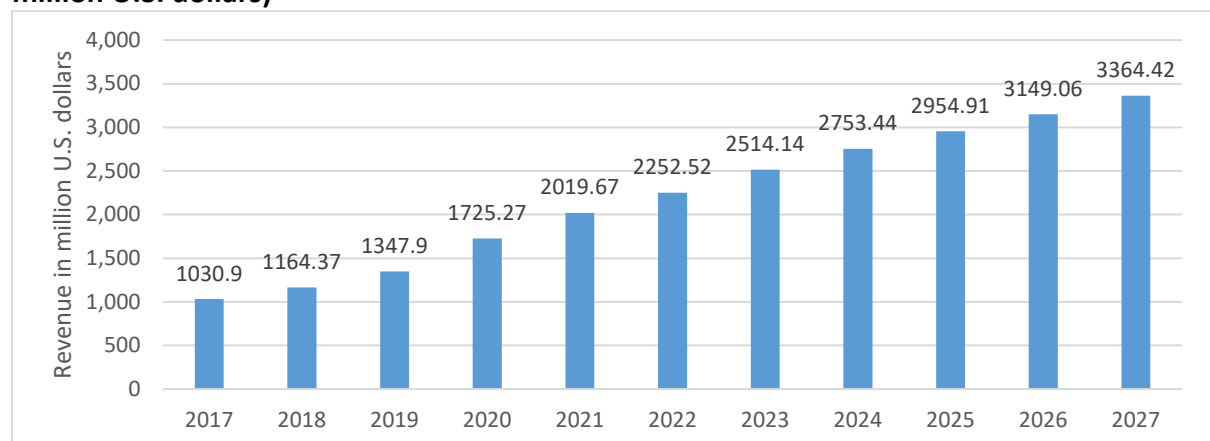
<sup>4</sup> "Digital Media is defined as audiovisual media contents and applications that are distributed directly over the internet. This includes digital video contents (e.g. movies, series and TV shows), digital music provided as download or internet-stream as well as digital games for different devices and electronically published content such as eBooks, eMagazines or ePapers" (Statista 2024b).

**Figure 1. Revenue of the media market in the Philippines from 2020 to 2029 (in million U.S. dollars)**



Source: Statista (2024a)

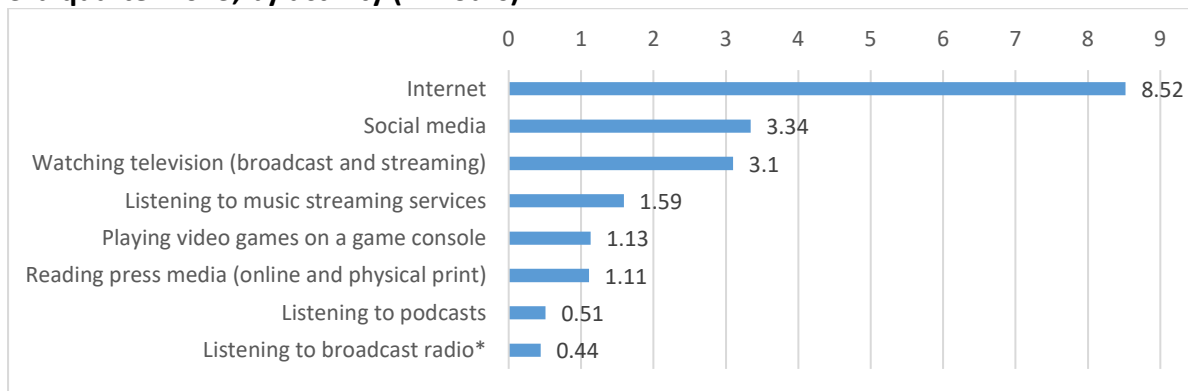
**Figure 2. Revenue of the digital media market in the Philippines from 2017 to 2027 (in million U.S. dollars)**



Source: Statista (2024b)

On average, Filipinos use the internet almost nine hours a day. An average of 3.34 hours is spent on social media, while 3.1 hours are spent watching television. More than an hour is spent listening to music, more or less than an hour is spent playing video games or reading press media (online or print), and less than an hour is spent listening to podcasts or broadcast radio (excluding internet radio). See Figure 3.

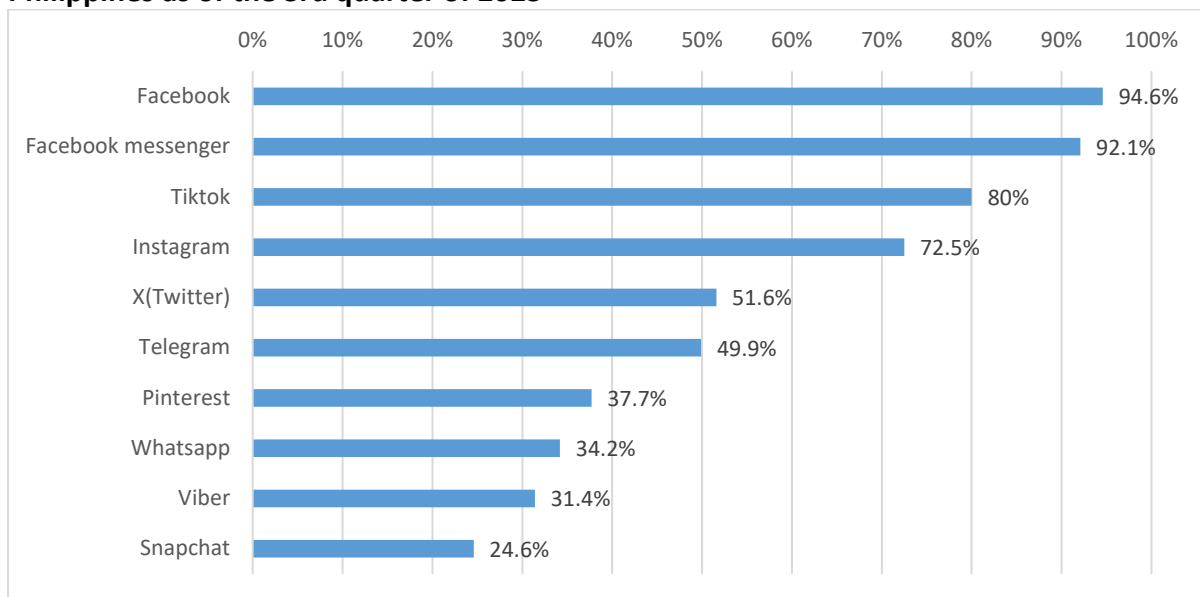
**Figure 3. Average daily time spent using various media and devices in the Philippines as of 3rd quarter 2023, by activity (in hours)**



Source: DataReportal et al. (2024a)

In terms of social media, Facebook was the most used platform, followed by Facebook Messenger, TikTok, Instagram, and Twitter (see Figure 4).

**Figure 4. Leading social media platforms used each month by internet users in the Philippines as of the 3rd quarter of 2023**



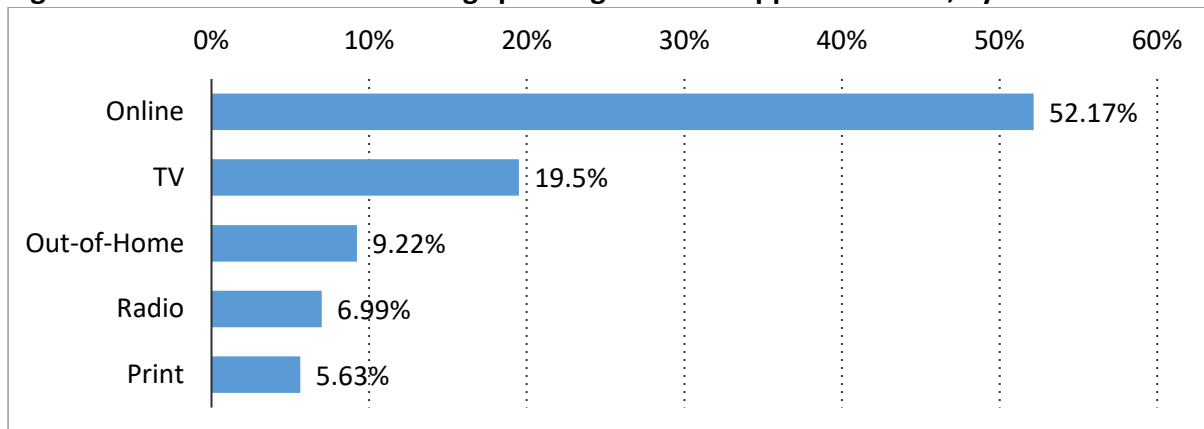
Note: YouTube was excluded from the options

Source: DataReportal et al. (2024b)

In terms of advertising, Online enjoys the largest ad spending with 52.17 percent. While Print is ranked last, with 5.63 percent. The difference, compared to Online, is about 46.54 percentage points (Figure 5).



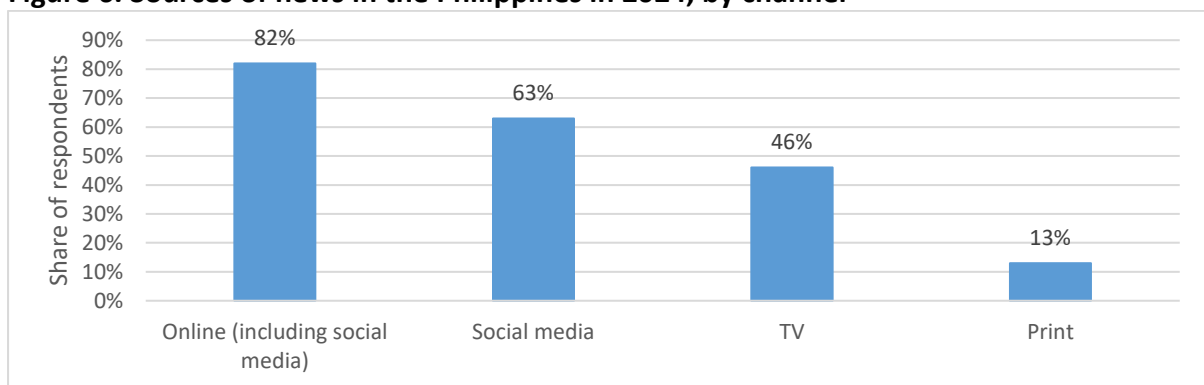
**Figure 5. Distribution of advertising spending in the Philippines in 2023, by media**



Source: Statista (2024c)

The majority of respondents access news from the internet, including social media (82%). About 46 percent access it through TV. In contrast, only 13 percent access it through print, as shown in Figure 6. Note, however, that this is based on an online survey. Hence, it is representative of the preference of the online population.

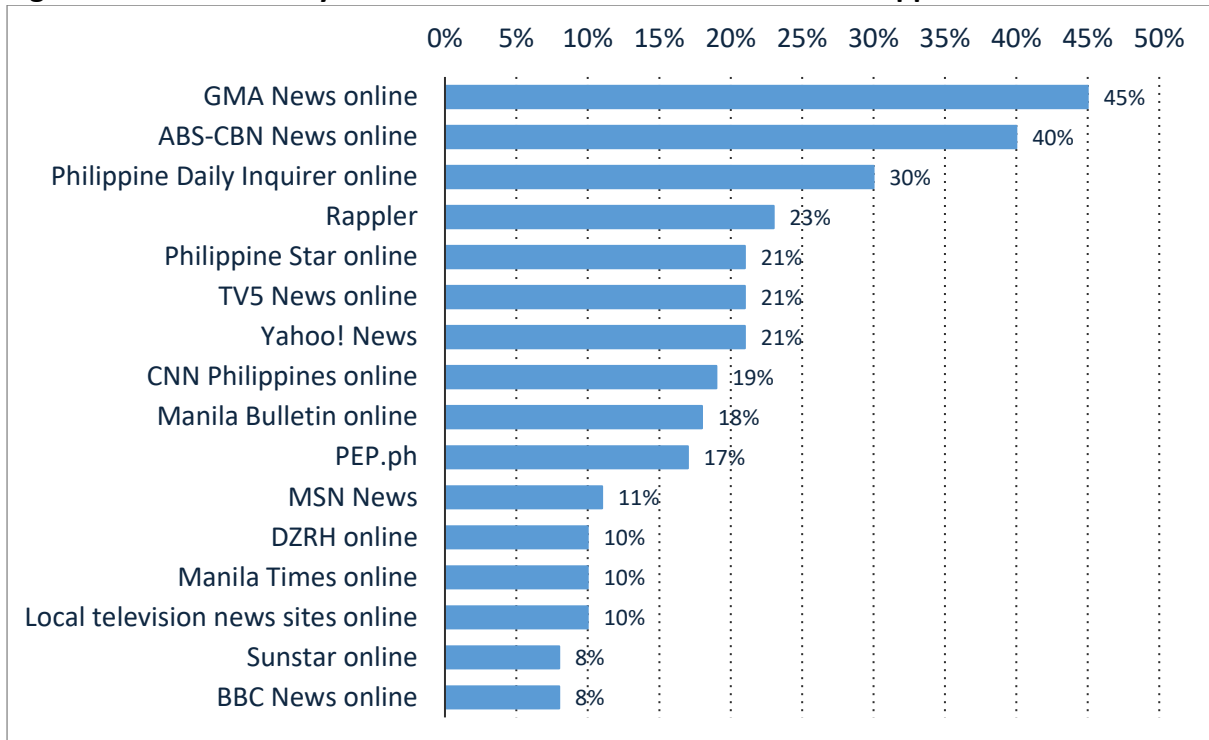
**Figure 6. Sources of news in the Philippines in 2024, by channel**



Source: Reuters Institute (2024a)

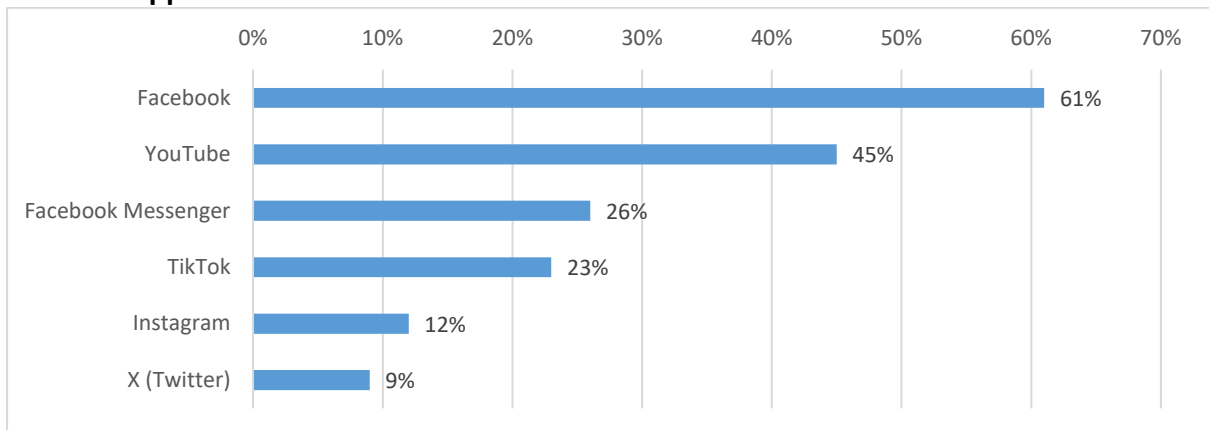
In terms of online news outlets, as shown in Figure 7, GMA earned the highest weekly news consumption (About 45% of the respondents), followed by ABS-CBN News Online (40%), Philippine Daily Inquirer Online (30%), and Rappler (23%). Figure 8 shows that about 61 percent of respondents also consume news through social media like Facebook, YouTube, Messenger, TikTok, Instagram, and X (formerly Twitter). In addition, Figure 9 shows that GMA was the leading TV station by audience share in 2023.

**Figure 7. Online: Weekly news reach of online media channels Philippines 2024**



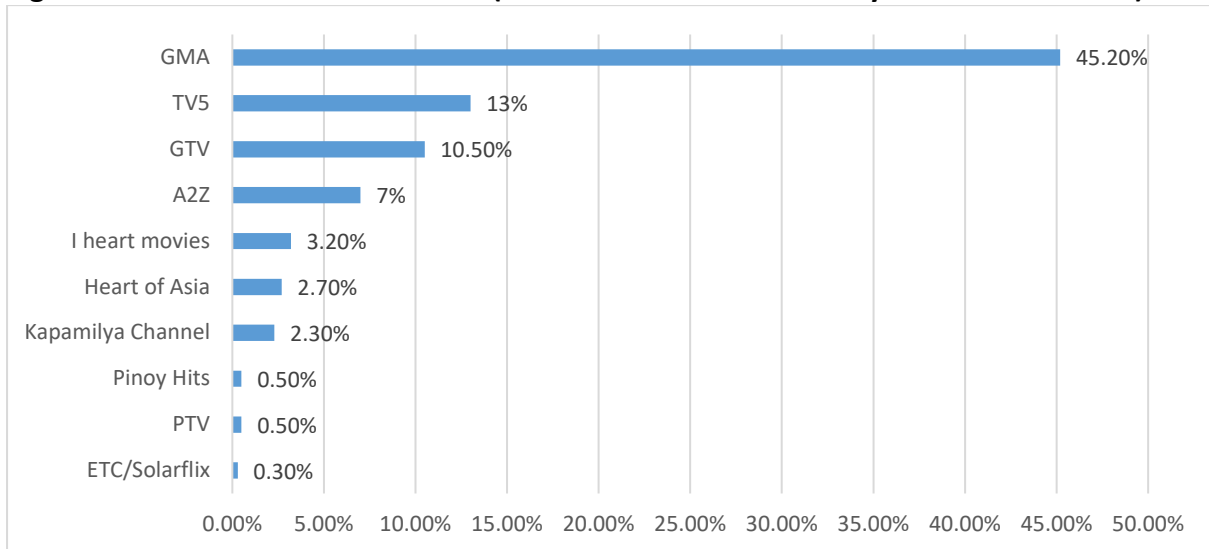
Source: Reuters Institute (2024b)

**Figure 8. Social media: Leading social media and messaging platforms for consuming news in the Philippines in 2024**



Source: Reuters Institute (2024c)

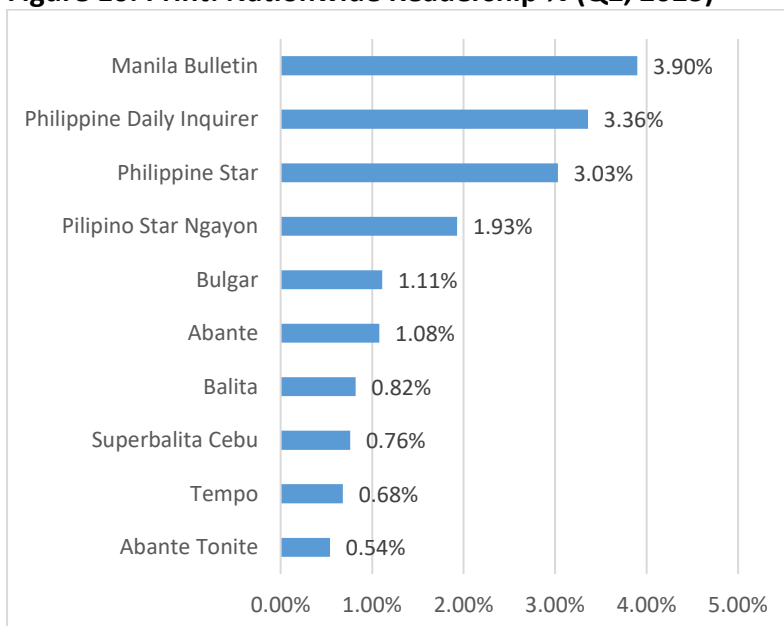
**Figure 9. Television: Audience share (Urban national from January to December 2023)**



Source: Data based on Nielsen Television Audience Measurement, as cited in GMA Network (2024)

In terms of print media, Manila Bulletin ranked first, followed by the Philippine Daily Inquirer and Philippine Star (see Figure 10). According to VERA Files (2024), newspapers enjoyed high circulation and readership prior to the emergence of social media and access to online information. The majority of tabloid and broadsheet periodicals had two print runs, with the first issue distributed to provinces across the country. Digitalization, the cost of printing newspapers, access to newsstands, and the decreasing number of mobile vendors are some of the factors that have contributed to its decline, which was made worse by the pandemic. The most significant factor was the change in consumer behavior as people switched to online sources for news and information with just a mobile device and internet data.

**Figure 10. Print: Nationwide Readership % (Q2, 2023)**



Source: VERA Files (2024)

### **3 Ownership and concentration of the mass media market**

#### **3.1 Media ownership in the Philippines**

The layered media model was used to gain better understanding of media ownership in the Philippines. ABS-CBN and GMA are active in most, if not all, the segments (i.e., multi-media). Media Quest is a holding company that has shares in different media companies (e.g., Signal TV, Philstar, and the TV5 Network) (see Figure 11).

ABS-CBN Corporation, majority owned by Lopez Family, is a diversified media conglomerate with a wide range of businesses. Its core operations include Print News & Literature, Television Programming/Video, Movies, Radio Programming, Advertising, Telecommunications, and Online Content & Services. In addition to its media-related businesses, ABS-CBN also operates in various other sectors such as content development, digital film archiving, cable and satellite programming services, money remittance, support, production, and livestock services, as well as real estate, restaurant and food, call center, theme parks, and cable television services.

MediaQuest Holdings, Inc., currently headed by Manuel “Manny” V. Pangilinan, was established in 1998 by PLDT through its Beneficial Trust Fund, a retirement fund agency. PLDT does not directly own any media property, as the 1987 Constitution states that media companies should be 100 percent owned by Filipinos and the PLDT’s major shareholders include foreign entities such as First Pacific, and Nippon Telegraph and Telephone. MediaQuest Holdings, Inc. owns a diverse portfolio of businesses across the television, newspaper, and radio industries. It is affiliated with Signal TV, Philstar, and the TV5 Network. In addition to its core media businesses, MediaQuest Holdings Inc. is involved in other media-related<sup>5</sup> ventures such as publications, printing, and content production. The company also has interests in non-media<sup>6</sup> sectors like real estate, logistics, education, and investment.

GMA Network, Inc., owned by the Gozon, Jimenez, and Duavit families, operates businesses in print news and literature, television programming and video, movies, radio programming, music and audio, advertising, and online content and services. Its other media ventures include digital media, online publishing and advertising, television, music, film production, international marketing and syndication, and marketing and sales. The company is also involved in other businesses such as investment, real estate, sports betting, and broadcasting.

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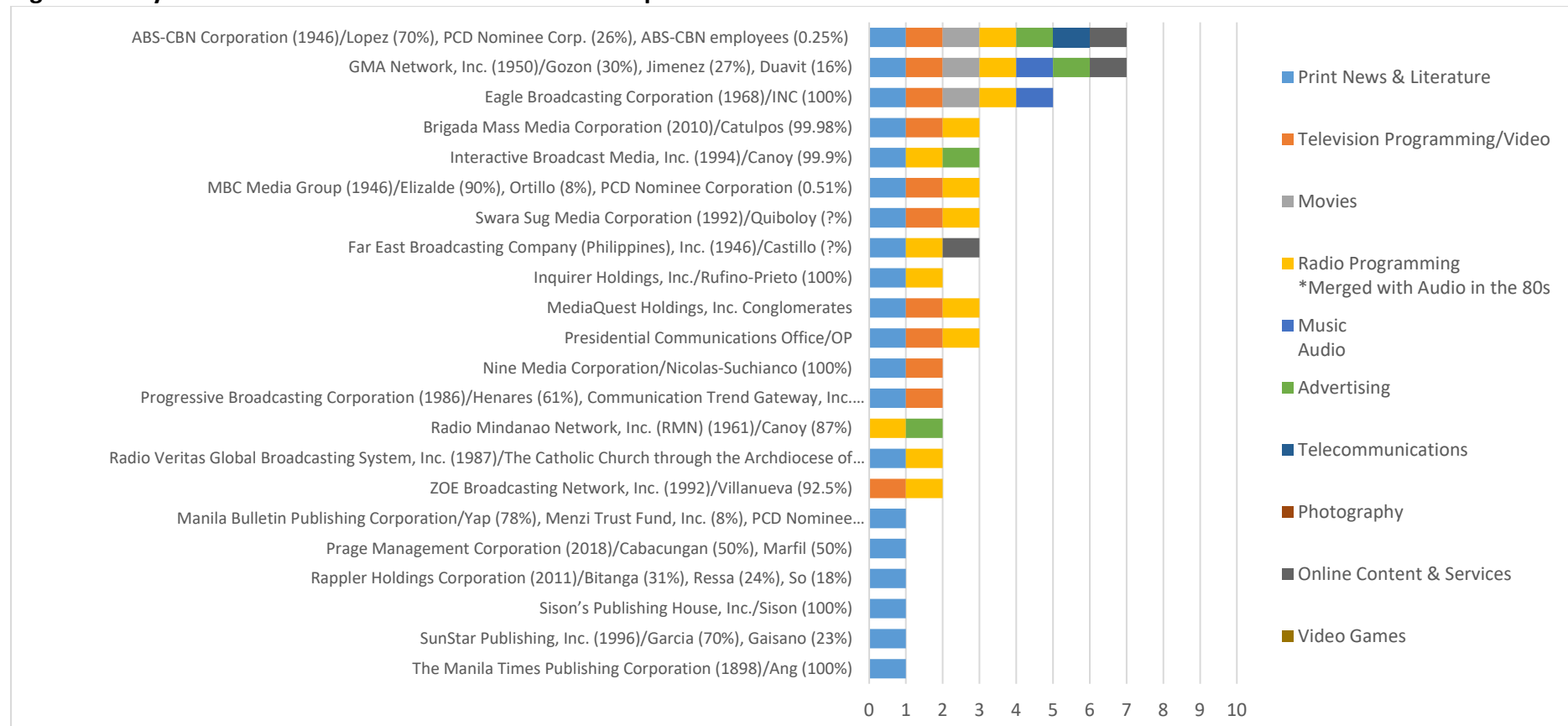
<sup>5</sup> Media related businesses of MediaQuest Holdings Inc. include Media5 Marketing Corporation (100%), Telemedia Business Ventures, Inc., Upbeam Investments, Inc., Studio5, Inc. (100%), Nation Broadcasting Corporation of the Philippines (51%), Signal TV, Inc. (100%), Signal Cable Corporation (99.9%), Pilipino Star Ngayon, Inc. (Philstar Ngayon) (80%), Business World Publishing Corporation (Business World) (61.3%), JS’ Publications (The Freeman) Co. Inc. (Freeman) (50%), Philstar Daily, Inc. (Philstar Daily) (51%), Pilipino Star Printing Co. Inc. (Philstar Printing) (80%), Philstar Global Corporation (75%), Pilipinas Global Network Limited (35.40%)

<sup>6</sup> Other businesses of MediaQuest Holdings Inc. include the following: Rental of movie and television equipment - Cinegear, Inc. (65.7%), Multi-media productions - UXS, Inc. (30%), Mixed media creation hub - Epik Studios Inc. (35%), Magazine publishing - Stargate Media Corporation (40%), Television channel operator - Sari-Sari Network, Inc. (50%), E-sports management and development - Philippine Online Sports League, Inc. (14%)

The majority owners of the Philippine Daily Inquirer, which used to be the most influential daily, have business interests in real estate and logistics. Manila Bulletin owner Emilio Yap is into shipping and other ventures. In addition, apart from for-profit private organizations, religious groups are also involved in mass media. The national government also owns and operates a tv and radio station.

See Annex 1 for the list of media companies (non-exhaustive) with their corresponding media product/content and other businesses.

**Figure 11. Layer 1 and 2 of the Media Model: Media Companies**



Note: The figure only represents the existence of a specific product/content for each media companies. It does not reflect the number of media outlets associated with each product/content. Distribution mechanisms of certain product or content are as follows: Print News & Literature = Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices; Television Programming/Video = Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P; Movies = Cinemas, Broadcast TV, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P; Radio Programming (Merged with Audio in the 80s) = Broadcast Radio Stations; Music/Audio = Radio, Records, Tapes, Broadcast Radio, Satellite Radio, Internet Sites & Online Stores, Podcasts, P2P; Advertising = TV, Radio, Mail, Magazines, Cable, Satellite, Mobile devices & PDAs, E-mail; Telecommunications = Phone Networks, Mobile Networks, Cable Networks, Internet Telephony (VOIP), IM; Photography = Cameras, Digital cameras, Camcorders, Mobile devices & PDAs, Internet & Online Stores; Online Content & Services = Phone, cable & wireless networks, IM, Portals, Blogs, Search Engines, Social Network Sites, RSS aggregators; Video Games = Video game platforms, Discs, Computer software, Internet & Online stores, Mobile networks.

Source: Author's compilation based on VERA Files (2024) and PSE (2024a; 2024b; 2024c; 2024d)

## 3.2 Concentration and market power in Philippine media

This section highlights the measures of market power and concentration in three mass media industries - newspaper publishing, radio broadcasting, and TV broadcasting. Though not part of mass media, wired internet access, wireless internet access, and internet access in facilities open to the public were also included as these communications industries enable access to digital media. Mobile telecommunications and satellite telecommunications are also briefly mentioned. Since the ASPBI is the source of the data used, the unit of analysis is the establishment<sup>7</sup>, which may not be the same as the number of TV and radio stations or communications providers reported by the National Telecommunications Commission.

### 3.2.1 Publishing of newspapers, journals, and periodicals (J58130)

This subclass includes the activities of publishing newspapers, including advertising newspapers, periodicals, and other journals, in print or electronically, including online. Five of 17 regions have no local newspaper establishments (Regions II, XII, XIII, IV-B, and BARMM), while six only have one to two establishments. Most regions have a highly concentrated market. Even when the National Capital Region (NCR) has 32 establishments, its market is still highly concentrated, as the top four establishments account for 83 percent of the revenue.

As for the MOCDI, no benchmark or threshold was found for interpretation. Nonetheless, a lower index is better since it generally represents less market and editorial concentration. Hence, it can be used to compare changes over time for the same market (see Section 3.2.9). For this specific subclass, NCR has the lowest MOCDI, reflecting more media diversity even though the market is highly concentrated (higher than Region IV-A). For completeness, the market concentration at the national level is also reported. However, this may not be interpretable when establishments are not competing in the same market. See Table 6.

**Table 6. Publishing of newspapers, journals and periodicals (J58130), 2021**

Region	Number of establishments	CR-4	HHI (computed value)	Market type	MOCDI
REGION I (Ilocos Region)	2	100%	5855	HC	4140
REGION II (Cagayan Valley)	-	-	-	-	-
REGION III (Central Luzon)	1	100%	10000	HC	10000
REGION IV-A (CALABARZON)	5	88%	2163	HC	967
REGION V (Bicol Region)	1	100%	10000	HC	10000
REGION VI (Western Visayas)	6	95%	4139	HC	1690
REGION VII (Central Visayas)	6	100%	4535	HC	1851
REGION VIII (Eastern Visayas)	2	100%	5129	HC	3627
REGION IX (Zamboanga Peninsula)	2	100%	5018	HC	3548
REGION X (Northern Mindanao)	1	100%	10000	HC	10000

<sup>7</sup> 2021 ASPBI defined an establishment as “an economic unit under a single ownership or control which engages in one or predominantly one kind of economic activity at a single fixed location. An establishment is categorized by its economic organization, legal organization, industrial classification, employment size, and geographic location (PSA 2024c, p. 15)

REGION XI (Davao Region)	4	100%	4711	HC	2356
REGION XII (Soccsksargen)	-	-	-	-	-
NATIONAL CAPITAL REGION (NCR)	32	83%	2446	HC	432
CORDILLERA ADMINISTRATIVE REGION (CAR)	3	100%	4724	HC	2727
REGION XIII (Caraga)	-	-	-	-	-
REGION IV-B (MIMAROPA)	-	-	-	-	-
BARMM	-	-	-	-	-
National	65	79%	2205	HC	274

Note: - = No establishments were recorded; The national level is reported for completeness, although it might not be interpretable because establishments do not serve the same market.

Source: ASPBI (2021)

### 3.2.2 Radio broadcasting and relay station and studios (J60101)

This subclass includes the transmission of audio signals from radio broadcasting studios and facilities to the public, affiliates, or subscribers via over-the-air broadcasts, cable, or satellite. All regions have a considerable number of establishments (more than 4), with Region VI having the highest number of establishments (42). The market is generally unconcentrated based on the number of unconcentrated markets in most regions (12), except Regions VIII, IX, NCR, and BARMM, where the market concentration is high, and Region IV-B, where the market concentration is moderate.

Interestingly, more establishments do not necessarily lead to less concentration, as in the case of Regions VIII, IX, and NCR. The NCR, for example, has 35 establishments, but the top 4 accounts for 67 percent of total revenues. Based on the HHI, it is still considered a highly concentrated market. However, given the high number of radio stations, its MOCDI score is still better than that of the other highly concentrated markets. See Table 7.

**Table 7. Radio broadcasting and relay station and studios (J60101), 2021**

Region	Number of establishments	CR-4	HHI (computed value)	Market type	MOCDI
REGION I (Ilocos Region)	26	38%	506	U	99
REGION II (Cagayan Valley)	12	52%	753	U	217
REGION III (Central Luzon)	14	52%	865	U	231
REGION IV-A (CALABARZON)	15	45%	664	U	171
REGION V (Bicol Region)	30	43%	912	U	166
REGION VI (Western Visayas)	42	23%	196	U	30
REGION VII (Central Visayas)	41	31%	512	U	80
REGION VIII (Eastern Visayas)	10	84%	3620	HC	1145
REGION IX (Zamboanga Peninsula)	26	77%	2460	HC	482
REGION X (Northern Mindanao)	38	44%	698	U	113
REGION XI (Davao Region)	24	50%	737	U	150
REGION XII (Soccsksargen)	34	48%	892	U	153



NATIONAL CAPITAL REGION (NCR)	35	67%	2663	HC	450
CORDILLERA ADMINISTRATIVE REGION (CAR)	13	41%	459	U	127
REGION XIII (Caraga)	30	46%	669	U	122
REGION IV-B (MIMAROPA)	9	64%	1006	MC	335
BARMM	5	98%	4502	HC	2013
National	404	30%	528	U	26

Note: The national level is reported for completeness, although it might not be interpretable because establishments do not serve the same market.

Source: ASPBI (2021)

### 3.2.3 Television broadcasting and relay stations and studios including closed circuit television services (J60201)

TV broadcasting is highly concentrated across all regions and at the national level. Only BARMM does not have any establishment in this industry. See Table 8. The number of establishments under this subclass, as reported in the ASPBI, is significantly lower than those reported by the NTC and in the Philippine Statistical Yearbook (PSY). According to the PSY, there were 656 TV stations in 2020, based on NTC data. One possible explanation is that the NTC issues more than one license for a TV station to an establishment. Based on FLEMMS (PSA 2021), television was the most popular form of mass media in the country. Although TV has a larger audience reach than other forms of media, its MOCDI is particularly high, indicating considerable market and editorial concentration outside Metro Manila.

**Table 8. Television broadcasting and relay stations and studios (J60201), 2021**

Region	Number of establishments	CR-4	HHI (computed value)	Market type	MOCDI
REGION I (Ilocos Region)	4	100%	9639	HC	4819
REGION II (Cagayan Valley)	2	100%	5029	HC	3556
REGION III (Central Luzon)	1	100%	10000	HC	10000
REGION IV-A (CALABARZON)	4	100%	8203	HC	4102
REGION V (Bicol Region)	2	100%	6859	HC	4850
REGION VI (Western Visayas)	6	97%	2686	HC	1096
REGION VII (Central Visayas)	4	100%	7350	HC	3675
REGION VIII (Eastern Visayas)	2	100%	8083	HC	5716
REGION IX (Zamboanga Peninsula)	3	100%	3362	HC	1941
REGION X (Northern Mindanao)	2	100%	6266	HC	4430
REGION XI (Davao Region)	1	100%	10000	HC	10000
REGION XII (Soccsksargen)	3	100%	4259	HC	2459
NATIONAL CAPITAL REGION (NCR)	11	50%	1561	MC	471
CORDILLERA ADMINISTRATIVE REGION (CAR)	1	100%	10000	HC	10000
REGION XIII (Caraga)	1	100%	10000	HC	10000

REGION IV-B (MIMAROPA)	1	100%	10000	HC	10000
BARMM	-	-	-	-	-
National	48	67%	1983	HC	286

Note: - = No establishments were recorded; The national level is reported for completeness, although it might not be interpretable because establishments do not serve the same market.

Source: ASPBI (2021)

### 3.2.4 Wired internet access service activities (e.g. DSL, leased line, dial-up) (J61102)

The subclass wired Internet access service activities (e.g., DSL, leased line, dial-up) includes the provision of Internet access through wired infrastructure. The market is highly concentrated across all regions and at the national level. The majority of regions (10 out of 17) have no establishments in this subclass, while six regions have only one or two establishments, and NCR has four. This shows limited competition where few entities dominate the subsector and have significant control over the market. See Table 9.

**Table 9. Wired internet access service activities (e.g., DSL, leased line, dial-up) (J61102), 2021**

Region	Number of establishments	CR-4	HHI (computed value)	Market type
REGION I (Ilocos Region)	-	-	-	-
REGION II (Cagayan Valley)	-	-	-	-
REGION III (Central Luzon)	-	-	-	-
REGION IV-A (CALABARZON)	1	100%	10000	HC
REGION V (Bicol Region)	2	100%	8824	HC
REGION VI (Western Visayas)	-	-	-	-
REGION VII (Central Visayas)	1	100%	10000	HC
REGION VIII (Eastern Visayas)	-	-	-	-
REGION IX (Zamboanga Peninsula)	-	-	-	-
REGION X (Northern Mindanao)	-	-	-	-
REGION XI (Davao Region)	1	100%	10000	HC
REGION XII (Soccsksargen)	-	-	-	-
NATIONAL CAPITAL REGION (NCR)	4	100%	5580	HC
CORDILLERA ADMINISTRATIVE REGION (CAR)	-	-	-	-
REGION XIII (Caraga)	1	100%	10000	HC
REGION IV-B (MIMAROPA)	1	100%	10000	HC
BARMM	-	-	-	-
National	11	87%	3476	HC

Note: - = No establishments were recorded; The national level is reported for completeness, although it might not be interpretable because establishments do not serve the same market.

Source: ASPBI (2021)

### 3.2.5 Wireless internet access service activities (e.g. Internet Service Provider, broadband) (J61203)

Wireless telecommunications is data transmission using electromagnetic waves or radio signals instead of cable, wire, or other physical connections (Vation Ventures n.d.). The specific subclass ‘Wireless Internet access service activities’ includes internet service providers and broadband, while it excludes satellite and mobile telecommunications services, which have their own respective subclasses. The number of establishments per region is generally more than that of the “wired internet access service activities” subclass. However, there are still less than five establishments per region, except NCR and Region III. BARMM did not have any establishments engaged in this activity. The market is highly concentrated across all regions except in NCR, where it is moderately concentrated. See Table 10.

**Table 10. Wireless internet access service activities (e.g., Internet Service Provider, broadband) (J61203), 2021**

Region	Number of establishments	CR-4	HHI (computed value)	Market type
REGION I (Ilocos Region)	1	100%	10000	HC
REGION II (Cagayan Valley)	2	100%	9433	HC
REGION III (Central Luzon)	6	92%	3509	HC
REGION IV-A (CALABARZON)	4	107%	3749	HC
REGION V (Bicol Region)	2	100%	8955	HC
REGION VI (Western Visayas)	1	100%	10000	HC
REGION VII (Central Visayas)	2	100%	8269	HC
REGION VIII (Eastern Visayas)	2	100%	7474	HC
REGION IX (Zamboanga Peninsula)	1	100%	10000	HC
REGION X (Northern Mindanao)	2	100%	9520	HC
REGION XI (Davao Region)	1	100%	10000	HC
REGION XII (Soccsksargen)	2	100%	9941	HC
NATIONAL CAPITAL REGION (NCR)	36	61%	1037	MC
CORDILLERA ADMINISTRATIVE REGION (CAR)	1	100%	10000	HC
REGION XIII (Caraga)	4	100%	4682	HC
REGION IV-B (MIMAROPA)	3	100%	3945	HC
BARMM	-	-	-	-
National	70	52%	828	U

Note: - = No establishments were recorded; The national level is reported for completeness, although it might not be interpretable because establishments do not serve the same market.

Source: ASPBI (2021)

### 3.2.6 Other wireless telecommunications services

Other wireless telecommunications services are available to consumers to access digital media, including mobile and satellite telecommunication services. However, fixed wired and wireless telecommunication is preferred since mobile broadband connections are less reliable due to limited traffic data allowance, incompatible with some devices at home, and less suitable for more productive activities such as learning and job seeking. Satellite services may also be more expensive and have less capacity to cover large numbers of users (Serafica and Oren 2023, 2024). Nevertheless, a brief description of their market concentration is included to provide additional insights.

- 3.2.6.1 *Mobile telecommunications services (J61202)*. This subclass includes establishments providing mobile telecommunications services. Mobile telecommunications use cell towers to provide cellular coverage to smartphones, including GSM, UMTS, and LTE (Ghayas 2021). Mobile telecommunication services industry is considered highly concentrated. In 2021, 11 regions did not have establishments, while Regions II, III, VI, IX, and IV-B only had one establishment, and NCR had six. See Table 11.
- 3.2.6.2 *Satellite telecommunications activities (J61300)*. This subclass includes establishments that manage and provide satellite-based communication services to transmit media such as voice, data, sound, text, and video to consumers via satellite telecommunications infrastructure (PSA 2019). The market concentration levels are mixed at the regional level in 2021. Regions I, VI, IX, X, XI, XII, CAR, XIII, and BARMM exhibited a highly concentrated market. Regions II, IV-A, V, VII, NCR, and IV-B showed a moderately concentrated market, while the remaining regions (Region III and VIII) have unconcentrated markets. Region IV-A has the highest number of establishments. It further shows that a high number of establishments does not necessarily translate to less concentration, especially if a few establishments account for a more significant market share, as shown in some highly concentrated regions (see Table 11).

**Table 11. Other wireless telecommunications services**

Region	Mobile telecommunications services				Satellite telecommunications services			
	Number of establishments	CR-4	HHI (computed value)	Market Type	Number of establishments	CR-4	HHI (computed value)	Market Type
REGION I (Ilocos Region)	-	-	-	-	9	99%	9144	HC
REGION II (Cagayan Valley)	1	100%	10000	HC	18	51%	1024	MC
REGION III (Central Luzon)	1	100%	10000	HC	31	39%	782	U

REGION IV-A (CALABARZON)	-	-	-	-	48	62%	1733	MC
REGION V (Bicol Region)	-	-	-	-	17	54%	1491	MC
REGION VI (Western Visayas)	1	100%	10000	HC	23	65%	1910	HC
REGION VII (Central Visayas)	1	100%	10000	HC	22	63%	1346	MC
REGION VIII (Eastern Visayas)	-	-	-	-	32	39%	769	U
REGION IX (Zamboanga Peninsula)	1	100%	10000	HC	13	68%	1803	HC
REGION X (Northern Mindanao)	-	-	-	-	10	99%	7129	HC
REGION XI (Davao Region)	-	-	-	-	10	85%	5045	HC
REGION XII (Soccsksargen)	-	-	-	-	13	89%	2729	HC
NATIONAL CAPITAL REGION (NCR)	6	100%	5073	HC	32	54%	1154	MC
CORDILLERA ADMINISTRATIVE REGION (CAR)	-	-	-	-	3	100%	5227	HC
AUTONOMOUS REGION IN MUSLIM MINDANAO (ARMM)	-	-	-	-				
REGION XIII (Caraga)	-	-	-	-	9	78%	1853	HC
REGION IV-B (MIMAROPA)	1	100%	10000	HC	20	49%	1130	MC
BARMM	-	-	-	-	3	100%	4675	HC
National	12	100%	5070	HC	313	29%	291	U

Note: - = No establishments were recorded; The 2021 ASPBI has defined an establishment as “an economic unit under a single ownership or control which engages in one or predominantly one kind of economic activity at a single fixed location” (PSA 2024c, p. 15). Thus, a company may operate more than one establishment that engages in different economic activities in different locations.

### 3.2.7 Internet access in facilities open to the public service activities (J61902)

For Internet access in facilities open to the public service activities, Table 12 shows that the concentration levels are mixed at the regional level. Regions III, IV-B, VII, XII, XIII, and NCR exhibited a highly concentrated market, while Regions VI showed a moderately concentrated market. BARMM had no establishment engaged in this activity, while the remaining regions have unconcentrated markets. Region IV-A has the highest number of establishments. It further shows that a high number of establishments does not necessarily translate to less concentration, especially if a few establishments account for a more significant market share, as in the case of NCR.

**Table 12. Internet access in facilities open to the public service activities (J61902), 2021**

Region	Number of establishments	CR-4	HHI (computed value)	Market type
REGION I (Ilocos Region)	15	50%	1074	MC
REGION II (Cagayan Valley)	10	48%	1101	MC
REGION III (Central Luzon)	19	69%	3092	HC
REGION IV-A (CALABARZON)	50	48%	1067	MC
REGION V (Bicol Region)	45	34%	832	U
REGION VI (Western Visayas)	13	66%	1789	MC
REGION VII (Central Visayas)	24	62%	2268	HC
REGION VIII (Eastern Visayas)	27	23%	419	U
REGION IX (Zamboanga Peninsula)	17	41%	817	U
REGION X (Northern Mindanao)	24	38%	627	U
REGION XI (Davao Region)	23	36%	632	U
REGION XII (Soccsksargen)	6	93%	3248	HC
NATIONAL CAPITAL REGION (NCR)	33	77%	2911	HC
CORDILLERA ADMINISTRATIVE REGION (CAR)	8	55%	1301	MC
REGION XIII (Caraga)	3	100%	3846	HC
REGION IV-B (MIMAROPA)	5	93%	3440	HC
BARMM	-	-	-	-
National	321	32%	377	U

Note: - = No establishments were recorded; The national level is reported for completeness, although it might not be interpretable because establishments do not serve the same market.

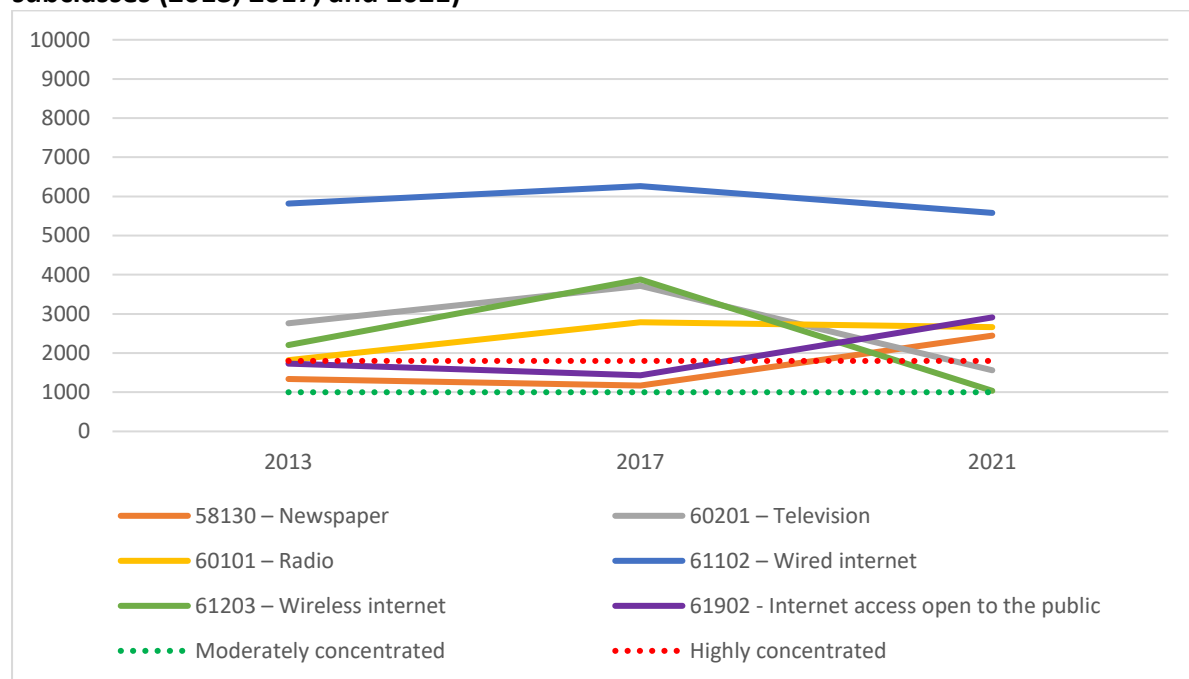
Source: ASPBI (2021)

### 3.2.8 Herfindahl-Hirschman Index (HHI) for selected subclasses 2013, 2017, and 2021

To assess market evolution over the past decade, the study also examined data from 2013 and 2017. Figure 12 shows the Herfindahl-Hirschman Index (HHI) results for NCR. The wired internet subclass is the most concentrated industry, although it has slightly improved in 2021. Wireless internet and television broadcasting have also improved. The case of TV broadcasting is interesting because the HHI significantly improved even with the closure of one major TV broadcasting company - ABS-CBN. That is, in 2017, there were 17 establishments in NCR. However, the 4-CR was at 93 percent. The 4-CR declined to 50 percent in 2021, even when the number of establishments decreased to 11. This means that the establishments that left the market had a significant market share and their exit led to less concentration. The improvement in market concentration was an unintended consequence of the exit of a big firm. In terms of newspaper publishing, there was a significant decrease in establishments from 76 to 32, so the market type shifted from moderately to highly concentrated. Thus, the effect of market exit depends on who is leaving the market: if a dominant firm leaves then market concentration will improve, but if smaller firms leave then market concentration increases.

For the subclass on Internet access in facilities open to the public, there was a significant decline in establishments from 168 in 2017 to 33 in 2021, leading to an increase in market concentration. The decline could be due to a number of factors, including the pandemic, which forced many small businesses to close down, a shift to smartphones for internet access, or the availability of free Wi-Fi in public places. Hence, the decline in firms is probably market-driven rather than policy-induced.

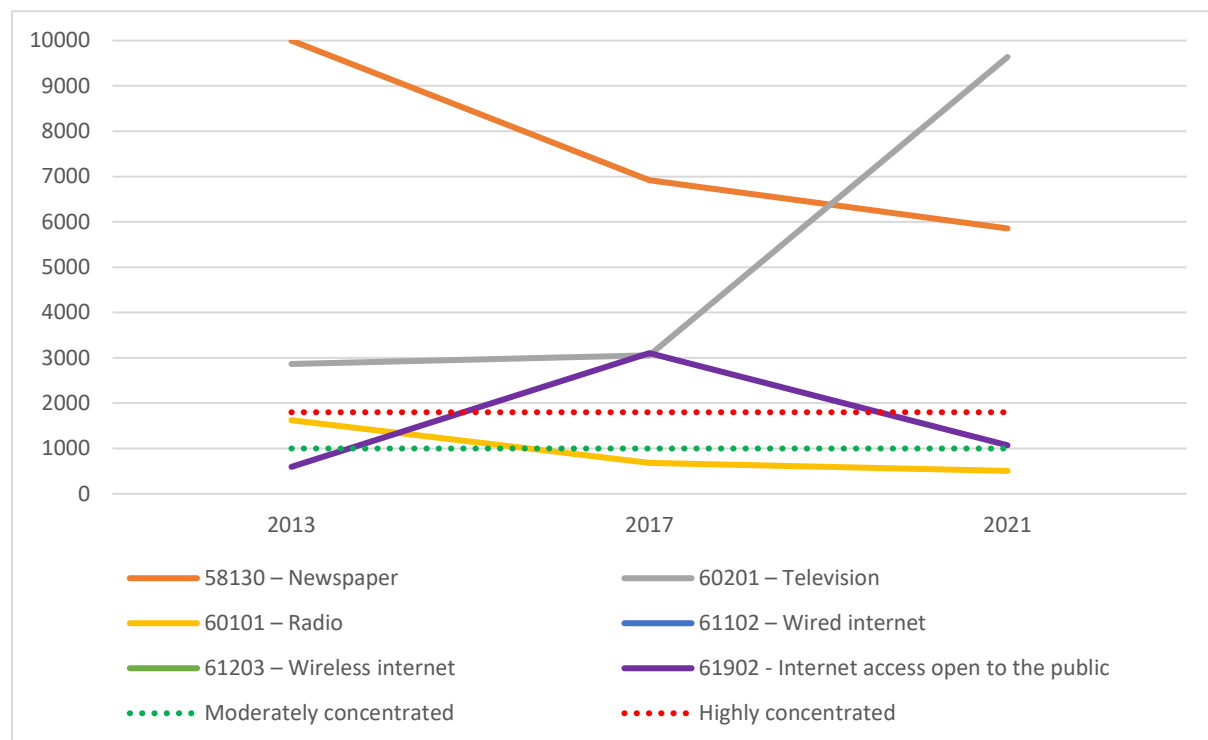
**Figure 12. National Capital Region: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

For Region I (Ilocos Region), the television broadcasting subclass is the most concentrated industry. The market concentration for newspaper publishing has decreased since 2013 but has remained highly concentrated. The television broadcasting subclass, highly concentrated in 2013, further increased concentration in 2021. High concentrations for both subclasses are due to the presence of few establishments. The region had no wired and wireless internet companies until 2021 when one wireless internet company existed. The radio broadcasting subclass is unconcentrated, with 26 establishments in 2021. See Figure 13.

**Figure 13. Region I: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**

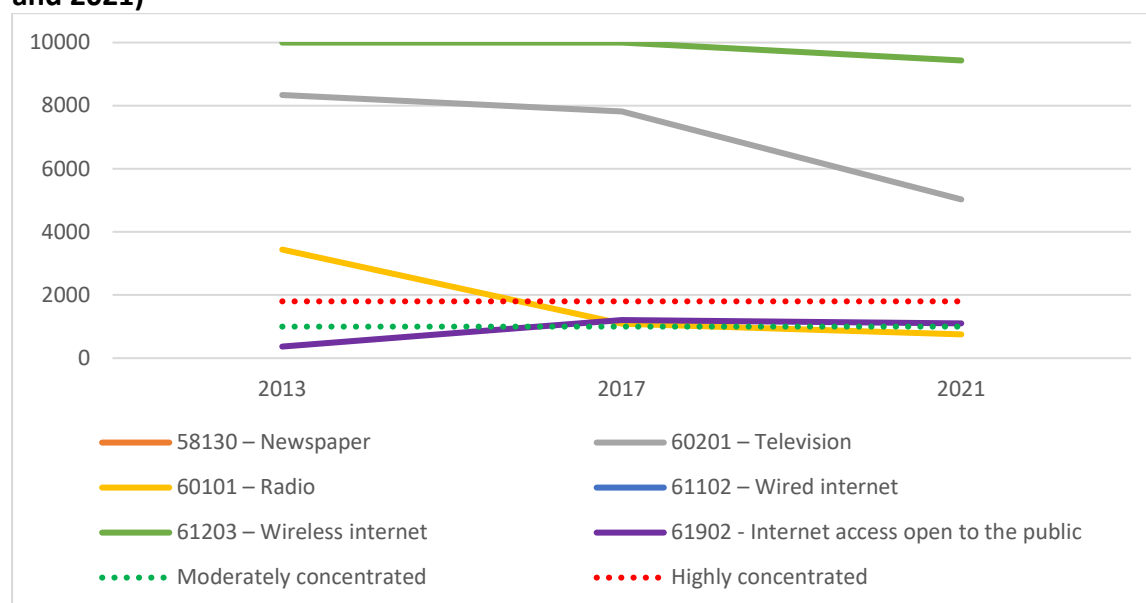


Source: ASPBI (2013, 2017, and 2021)

In Region II (Cagayan Valley), the wireless internet subclass is the most concentrated industry. The wireless internet and television broadcasting subclasses showed a highly concentrated market, with only two establishments each in 2021, while the region had no wired internet and local newspaper publishing establishments in the same year. The Internet access in facilities open to the public service activities subclass had a decrease in establishments from 43 to 10, such that the market shifted from unconcentrated to moderately concentrated. In contrast, the concentration of the radio broadcasting subclass continuously improved from highly concentrated in 2013 to unconcentrated, with 12 establishments in 2021 (See Figure 14).



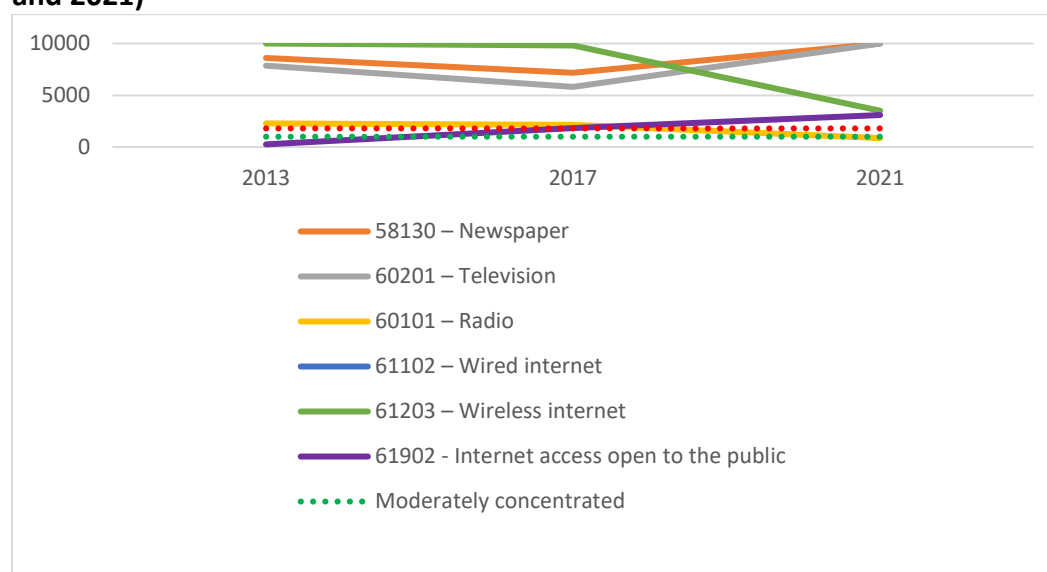
**Figure 14. Region II: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

In Region III (Central Luzon), the newspaper publishing and TV broadcasting subclasses are the most concentrated industries. The newspaper publishing subclass has shown an increase in market concentration, from two establishments in 2013 to one in 2021. Similarly, of the five TV broadcasting establishments in 2013, only one remained in 2021. In contrast, wireless internet establishments grew from one in 2013 to six in 2021, improving market competition. However, there is still no local establishment for wired internet. For the subclass on Internet access in facilities open to the public, there was a significant decline in establishments, leading to increased market concentration, from being unconcentrated with 84 establishments in 2013 to highly concentrated with 19 establishments in 2021. See Figure 15.

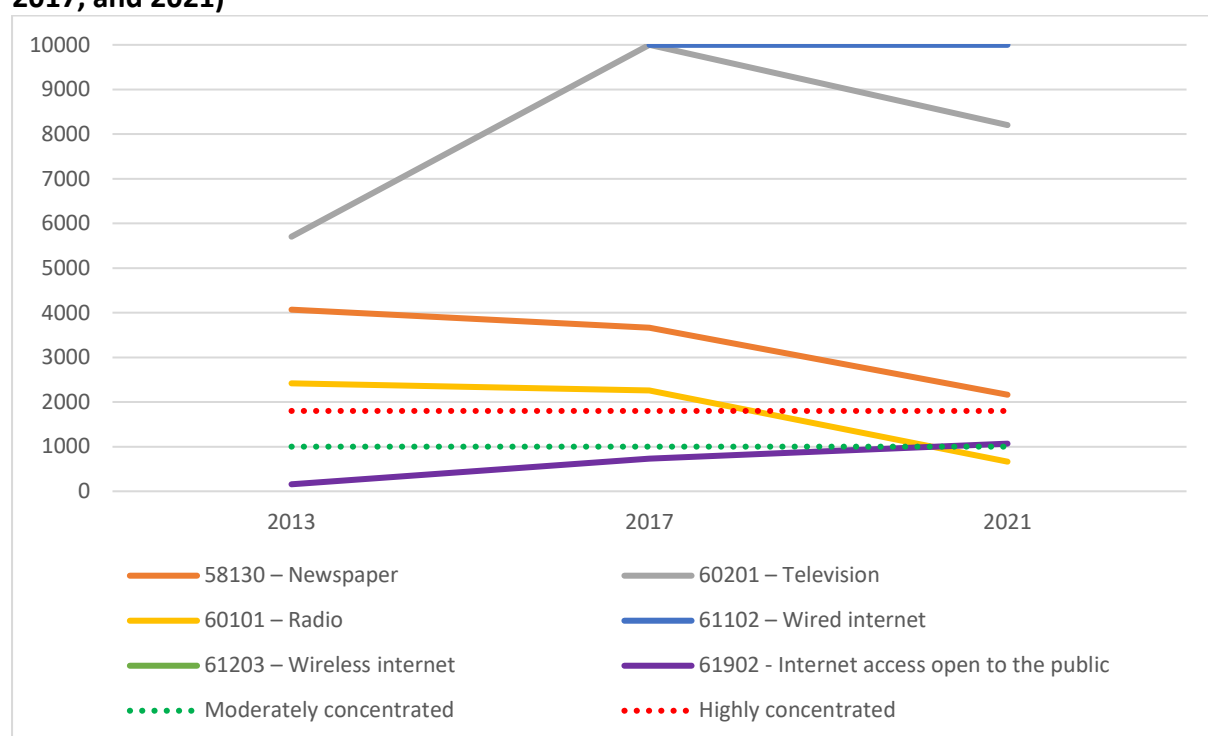
**Figure 15. Region III: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

Region IV-A (CALABARZON) has had one establishment under the wired Internet subclass since at least 2017, making it a highly concentrated market. TV broadcasting is also highly concentrated, although its number of establishments increased from two in 2013 to four in 2021. The concentration of newspaper publishing is due to increased establishments from four to five from 2013 to 2021. For the subclass on radio broadcasting, there was a significant increase in establishments from 9 in 2013 to 15 in 2021, leading to a shift from a highly concentrated to an unconcentrated market. The number of newspaper publishing establishments increased from 3 in 2017 to 5 in 2021. However, it remained highly concentrated (see Figure 16). Regarding Internet access in facilities open to the public, establishments significantly declined from 167 in 2013 to 50 in 2021, leading to an increase in market concentration from unconcentrated to moderately concentrated.

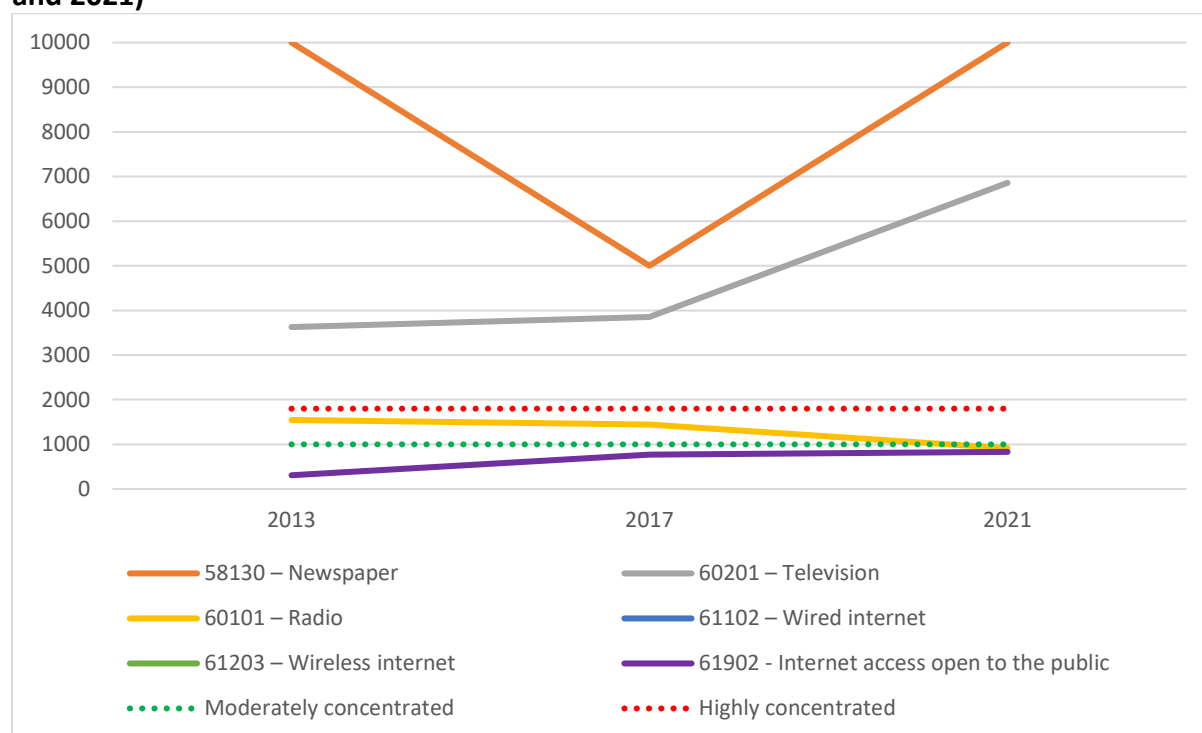
**Figure 16. Region IV-A: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

The newspaper publishing subclass was the most concentrated industry, followed by TV broadcasting in Region V (Bicol Region), with only one and two establishments in 2021, respectively. The region had no wired or wireless internet establishments until 2021 when two of each were recorded. Radio broadcasting and internet access in facilities open to the public service activities were both unconcentrated in 2021. See Figure 17.

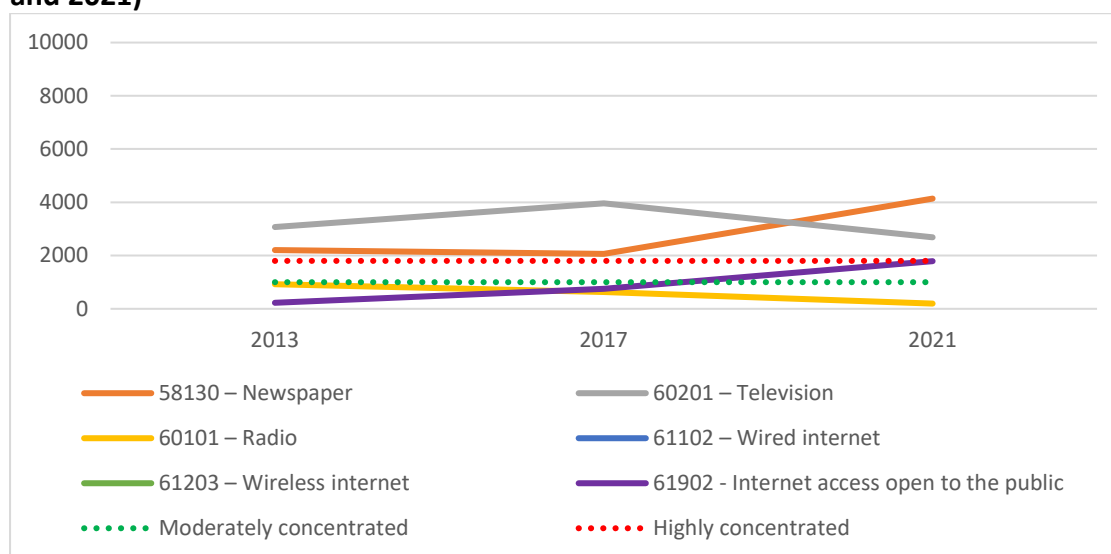
**Figure 17. Region V: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

In Region VI (Western Visayas), newspaper publishing and TV broadcasting have remained highly concentrated since 2013, with only six establishments each in 2021. The region has one local wireless internet establishment, making the corresponding subclass highly concentrated. The region has no local wired internet establishment. For the subclass on Internet access in facilities open to the public, there was a significant decline in establishments from 124 in 2013 to 13 in 2021, leading to a shift from concentrated to moderately concentrated. The market concentration for Radio broadcasting is continuously improving from 29 establishments in 2013 to 42 in 2021. See Figure 18.

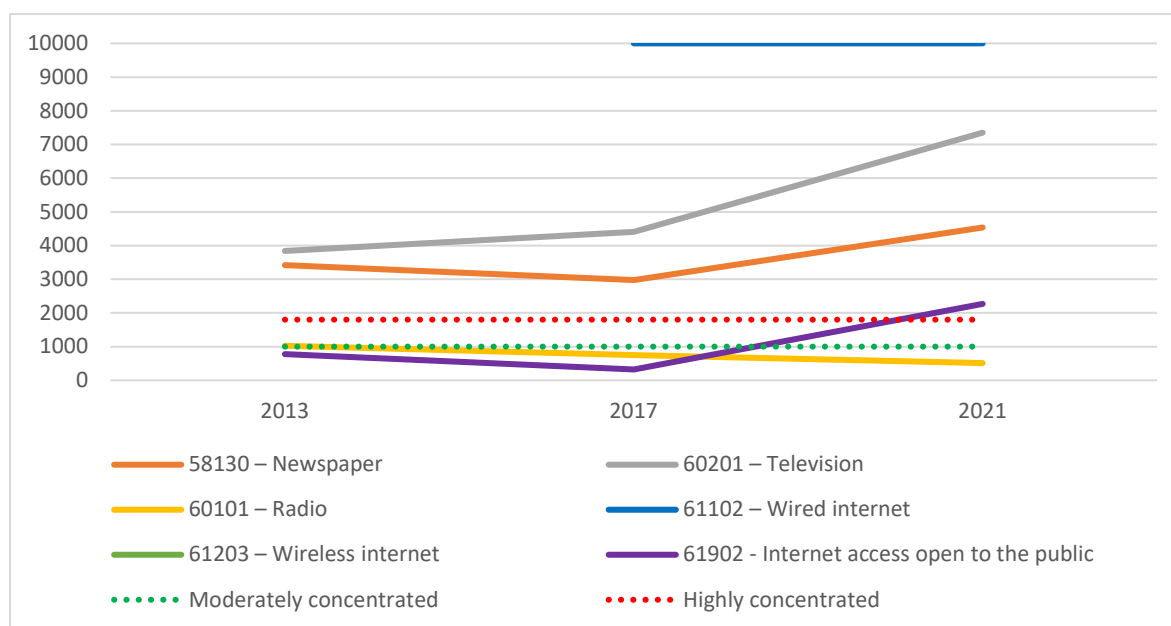
**Figure 18. Region VI: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

Since 2017, Region VII (Central Visayas) has had only one establishment under the wired internet subclass, making it the most concentrated industry. Newspaper publishing and TV broadcasting remained highly concentrated from 2013 to 2021. For the subclass on Internet access in facilities open to the public, establishments significantly declined from 123 in 2013 to 24 in 2021, consequently shifting from an unconcentrated to a moderately concentrated market. Additionally, it recorded two wireless establishments in 2021. The market concentration for the radio broadcasting industry improved from moderately concentrated to unconcentrated, from 30 establishments in 2013 to 41 in 2021 (see Figure 19).

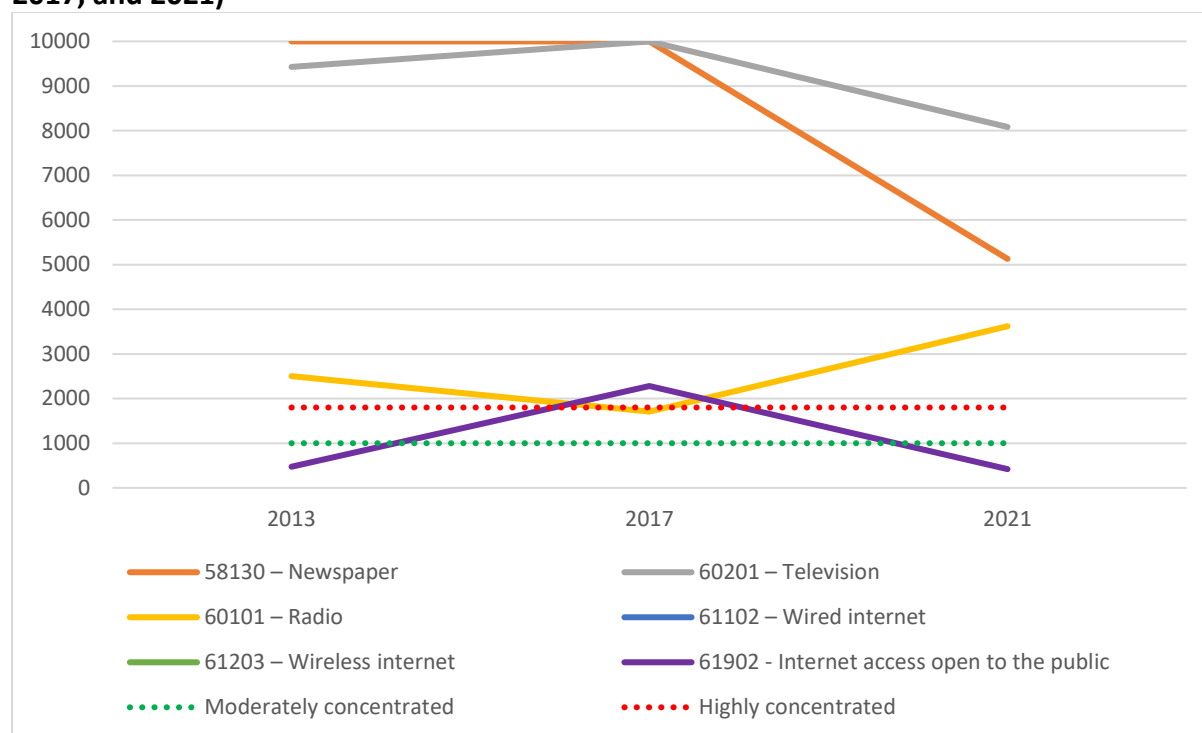
**Figure 19. Region VII: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

Figure 20 shows that the market concentration of newspaper publishing and TV broadcasting market in Region VIII (Eastern Visayas) are improving. However, they were still highly concentrated. Radio broadcasting initially had a moderately concentrated market in 2017 but became highly concentrated in 2021 due to a decline of establishments from 12 in 2017 to 10 in 2021. Internet access in facilities open to the public service activities subclass was unconcentrated in 2013 and 2021. However, the number of establishments has declined from 45 in 2013 to 27 in 2021. The region has no local wired internet establishment; it had two wireless internet establishments in 2021.

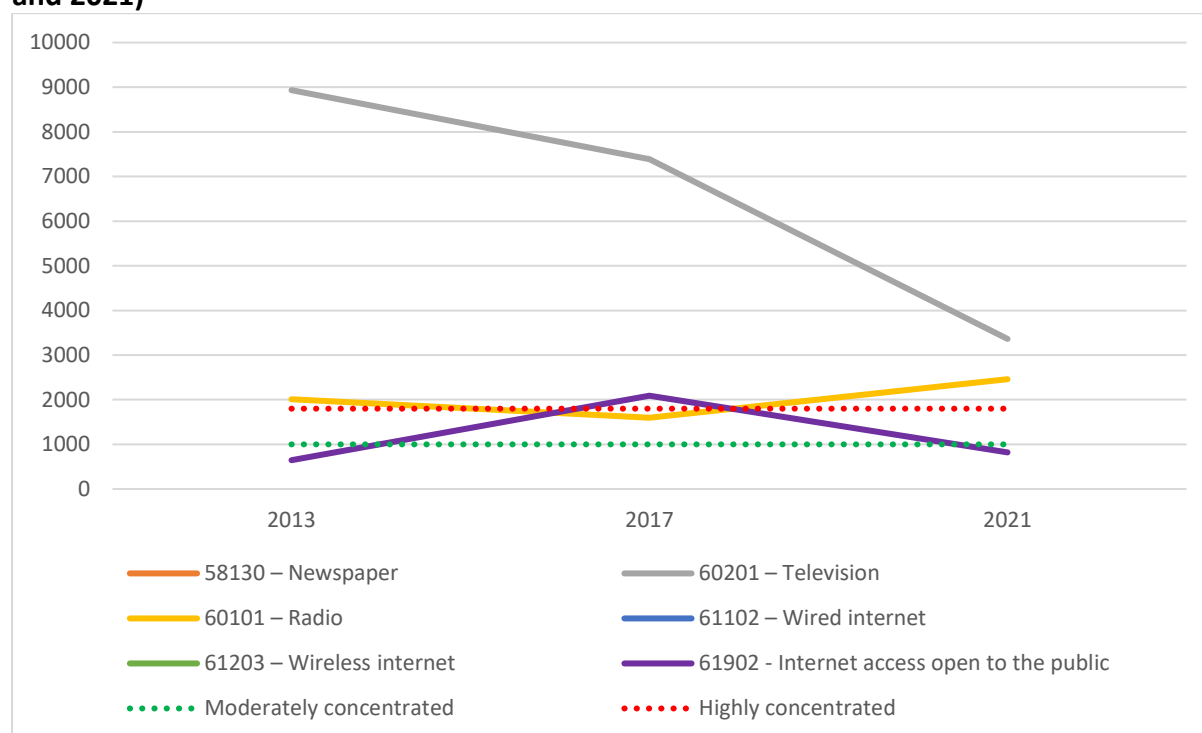
**Figure 20. Region VIII: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

Region IX (Zamboanga Peninsula) had no wired internet from 2013 to 2021, but only one wireless internet establishment was established in 2021. Internet access in facilities open to the public service activities subclass was unconcentrated in 2021 with 17 establishments. However, the number of establishments is declining, from 32 to 17, from 2013 to 2021. It also had no newspaper publishing establishments until 2021, when it recorded two establishments. TV broadcasting subclass remained the most concentrated, with three establishments in 2021 from four in 2013. The Radio broadcasting subclass was also highly concentrated as of 2021, even though the number of establishments increased from 16 to 26 from 2013 to 2021. This is because few establishments have earned a large portion of the market share. See Figure 21.

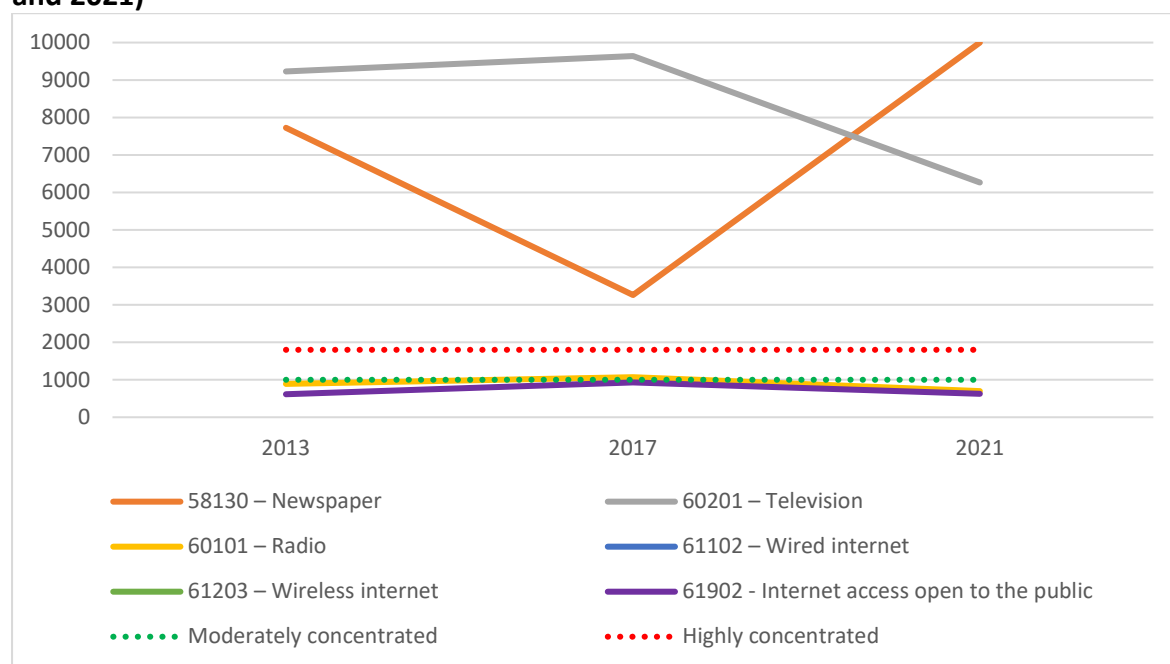
**Figure 21. Region IX: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

In Region X (Northern Mindanao), the TV broadcasting subclass is the most concentrated industry, although it has improved in 2021. The newspaper publishing market's concentration increased due to the decrease in establishments from three in 2013 to one in 2021. It has no wired internet establishments from 2013 to 2021, while internet access in facilities open to the public service activities remained unconcentrated from 2013 to 2021. However, establishments are continuously declining from 54 in 2017 to 24 in 2021. The region did not have establishments under the wireless internet subclass until 2021, recording two local establishments. The radio broadcasting subclass remained unconcentrated since 2013 to 2021 with increasing establishments from 28 in 2013 to 38 in 2021. See Figure 22.

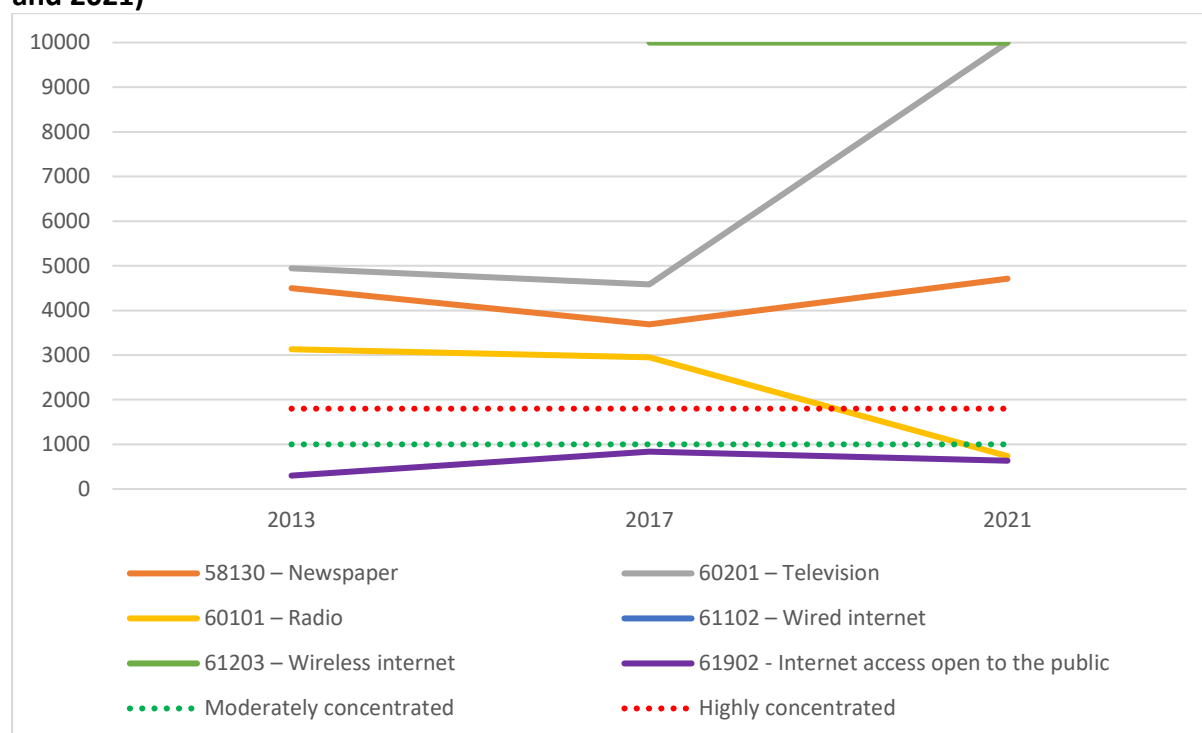
**Figure 22. Region X: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

In 2021, Region XI (Davao Region), the wired internet subclass is highly concentrated with only one establishment from 2013 to 2021. The TV broadcasting subclass significantly increased market concentration due to the decline in establishments from four in 2013 to one in 2021. In contrast, the market concentration for the Internet access in facilities open to the public service activities and the radio broadcasting subclass have improved from 2017 to 2021. The newspaper publishing subclass remained highly concentrated, with four establishments in 2021 (see Figure 23).

**Figure 23. Region XI: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**

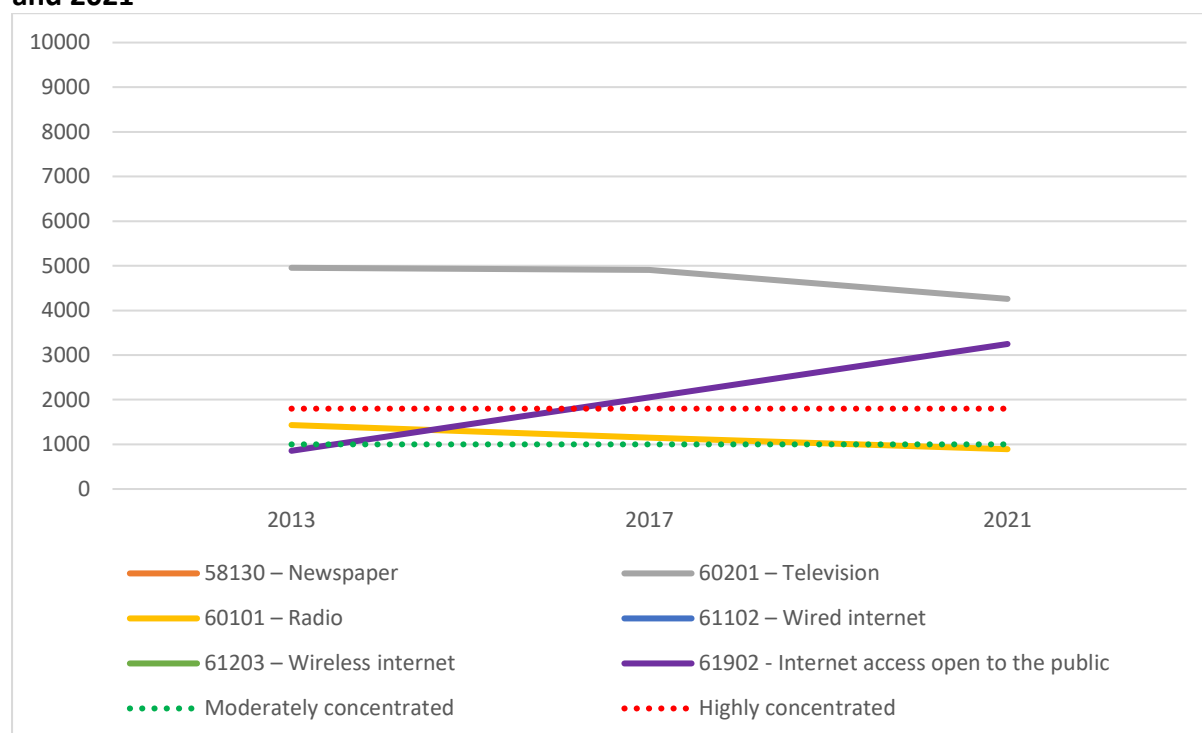


Source: ASPBI (2013, 2017, and 2021)

In Region XII (SOCCSKSARGEN), the TV broadcasting subclass is the most concentrated industry, although it has slightly improved in 2021. It had no local newspaper publishing and wired internet establishments from 2013 to 2021. The region had one establishment under the wireless internet subclass in 2013, none in 2017, and two in 2021. The market concentration increased for the internet access in facilities open to the public service activities due to the decline of establishments from 29 in 2013 to 6 in 2021. The market concentration for the radio broadcasting subclass improved from moderately concentrated, with 17 establishments in 2013, to unconcentrated, with 34 establishments in 2021. See Figure 24.



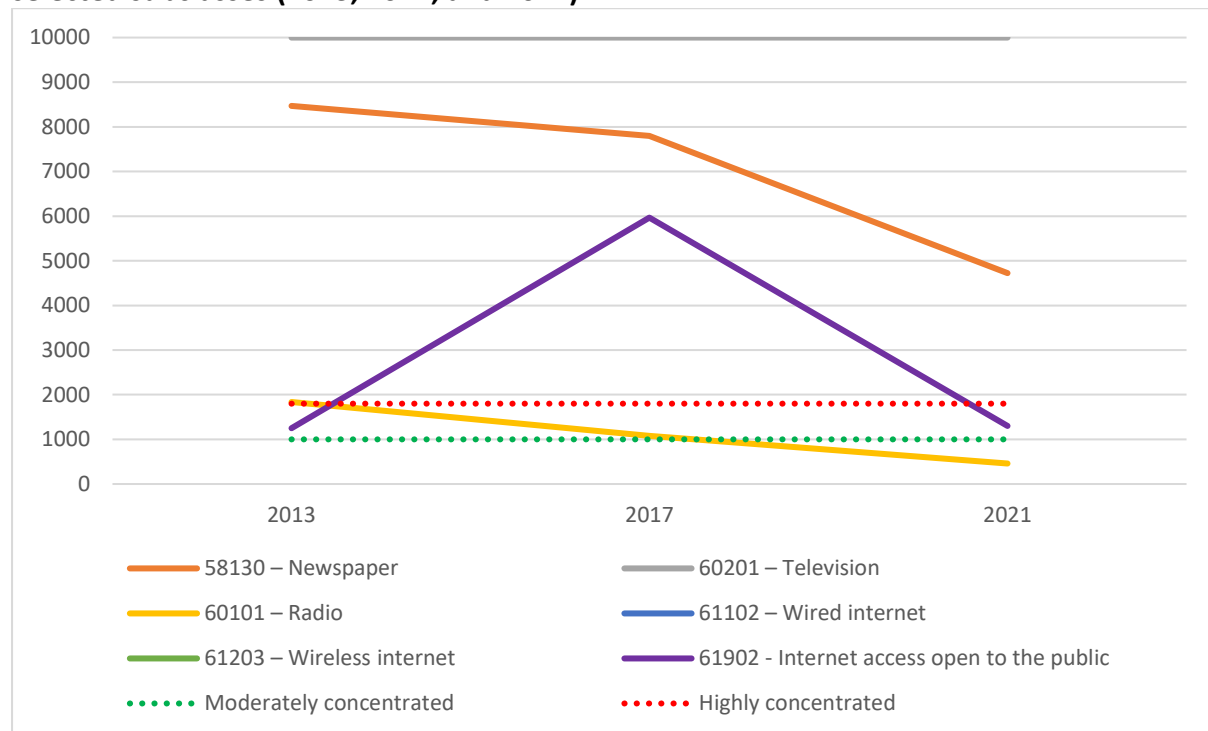
**Figure 24. Region XII: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

Cordillera Administrative Region (CAR) has only one local establishment dominating the TV broadcasting from 2013 to 2021. There were no establishments under the wireless internet subclass until 2021, when it recorded one. The region has no local wired internet establishment. The market for internet access in facilities open to the public service activities remained moderately concentrated. However, the number of establishments decreased from 22 in 2013 to 8 in 2021. The newspaper publishing subclass is highly concentrated, although its trend has declined from 2017 to 2021, and the radio broadcasting subclass shifted from being highly concentrated in 2013 to unconcentrated in 2021, more likely due to the improvement in market shares among establishments than the increase in establishments. See Figure 25.

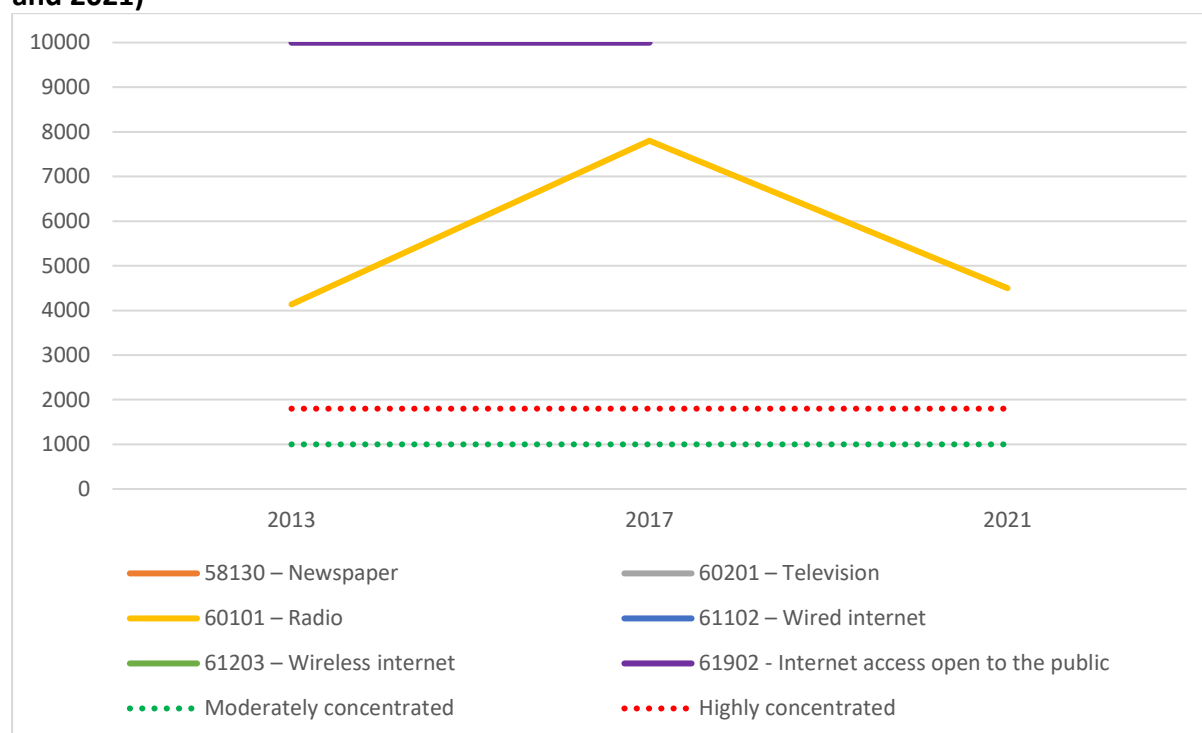
**Figure 25. Cordillera Administrative Region (CAR): Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

BARMM has no local establishments for newspaper publishing, TV broadcasting, wired and wireless internet, and internet access in facilities open to the public service activities in 2021. However, in 2013 and 2017, it had one establishment under Television broadcasting and internet access in facilities open to public service activities. The radio broadcasting subclass remained highly concentrated, with five establishments in 2021. See Figure 26.

**Figure 26. BARMM: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**

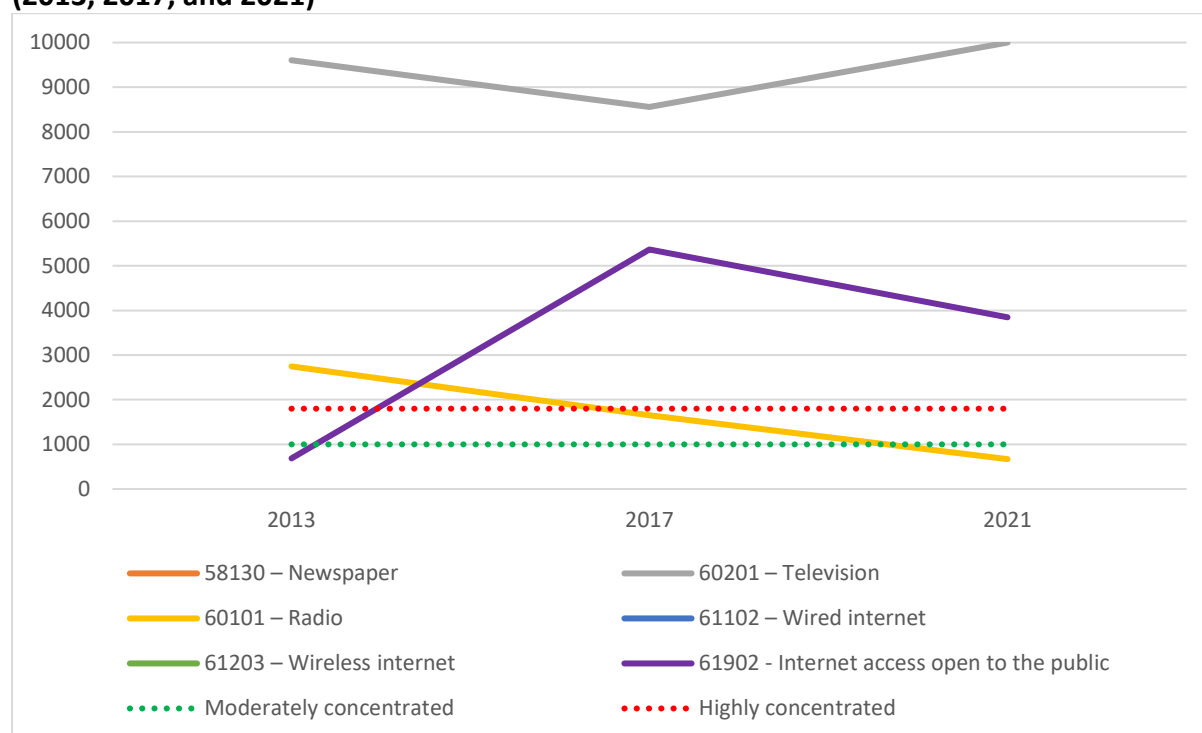


Note: Republic Act No. 11054 (Organic Law for the Bangsamoro Autonomous Region in Muslim Mindanao), signed in 2018, introduced an expansion in the territorial jurisdiction of the former Autonomous Region in Muslim Mindanao (ARMM). The region was subsequently renamed the Bangsamoro Autonomous Region in Muslim Mindanao (BARMM). As a result, data from 2013 and 2017 is not directly comparable to data from 2021 due to changes in the region's boundaries and governance structure.

Source: ASPBI (2013, 2017, and 2021)

Region XIII (Caraga), the TV broadcasting subclass, is the most concentrated industry, with only one establishment in 2021 from two establishments in 2017. The wired internet subclass recorded only one establishment in 2021, making it highly concentrated, while none were established in 2013 and 2017. It had no local newspaper publishing establishment. In addition, the region had no establishments under the wireless internet until 2021, recording four establishments, making it highly concentrated. The internet access in facilities open to the public service activities subclass was also highly concentrated, with four establishments in 2021. It used to be unconcentrated in 2013 with 27 establishments. The market concentration for the radio broadcasting subclass improved from being highly concentrated, with ten establishments in 2013, to unconcentrated, with 30 establishments in 2021. See Figure 27.

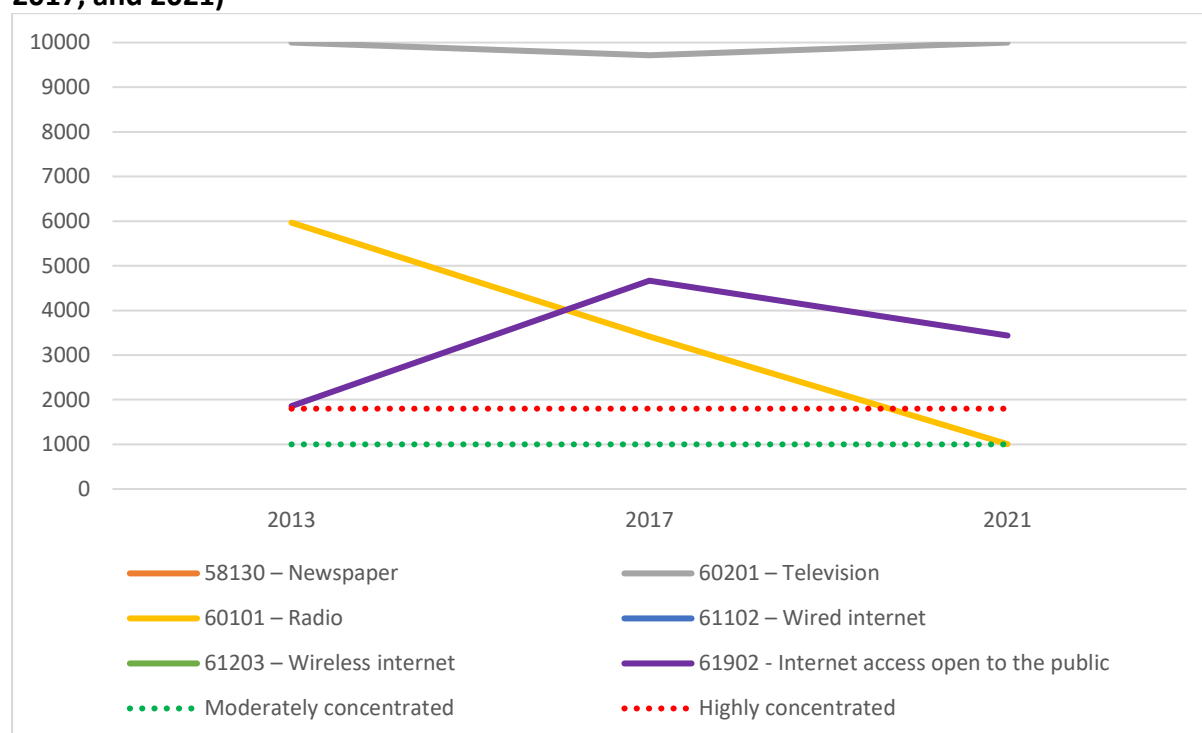
**Figure 27. Region XIII (Caraga): Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

In Region IV-B (MIMAROPA), only one establishment dominated TV broadcasting in 2021. It used to have two establishments in 2017. In 2013 and 2017, no wired or wireless internet services were available. By 2021, one wired and three wireless providers had emerged. The internet access in facilities open to the public service activities subclass remained highly concentrated. Radio broadcasting improved market concentration from highly concentrated to moderately concentrated due to the increase in the number of establishments. The region had no local newspaper publishing establishment. See Figure 28.

**Figure 28. Region IV-B: Herfindahl-Hirschman Index (HHI) for selected subclasses (2013, 2017, and 2021)**



Source: ASPBI (2013, 2017, and 2021)

### 3.2.9 MOCDI for selected subclasses (2013, 2017, 2021)

The Media Ownership and Concentration Diversity Index (MOCDI) was developed to capture the level of media diversity in addition to market concentration. Thus, it is important to look at its subcomponents – changes in the HHI (representing market concentration) and the number of establishments (representing diversity or the number of voices) – to understand changes in the index.

In almost all the regions, MOCDI is lower in radio compared to newspaper publishing or TV broadcasting. The exception is the National Capital Region where newspapers had a lower MOCDI than radio or TV although the difference is not significant particularly in 2021.

In **newspaper publishing**, there was an improvement in the index (MOCDI decreased) in Regions I, CAR, IV-A, and VIII from 2013 to 2021. The decrease in MOCDI is generally due to an increase in the number of establishments, an improvement in plurality, which consequently distributes market concentration among more entities and lowers the HHI. In other regions, the index worsened (MOCDI increased).

In **radio broadcasting**, there was an improvement in the index (MOCDI decreased) from 2013 to 2021 in all regions except in Regions VIII, NCR, BARMM (MOCDI increased). The decrease in MOCDI is generally due to an increase in the number of establishments, an improvement in plurality, which consequently distributes market concentration among more entities and lowers the HHI. In some cases, even when the number of establishment increased or remained the same, as in the case of region VIII and BARMM, the market concentration increased, also increasing the MOCDI.

In **TV broadcasting**, even when the MOCDI decreased due to the decrease in HHI in Regions II, VI, IX, X, XII, and NCR from 2013 to 2021, it does not necessarily mean more diversity because the number of establishments remained the same or even decreased. For regions I, III, V, VII, XI, and XIII, the MOCDI has worsened (MOCDI increased) mainly due to decreased voices (decrease in the number of establishments), while Region IV-A's MOCDI slightly increased due to the increase in HHI even when the number of establishments increased from two to four. The index remained the same for Regions CAR, IV-B, and VIII, where only one establishment exists in the TV broadcasting subclass. There were no establishments recorded in BARMM. See Table 14.

**Table 13. MOCDI for selected subclasses (2013, 2017, and 2021)**

Region	2013			2017			2021		
	News paper	Radio	TV	New paper	Radio	TV	News paper	Radio	TV
REGION I (Ilocos Region)	10000	325	1170	4894	132	1154	4140	99	4819
REGION II (Cagayan Valley)	-	1088	5896	10000	314	5524	-	217	3556
REGION III (Central Luzon)	6076	722	3511	5074	596	3357	10000	231	10000
REGION IV-A (CALABARZON)	2034	806	4033	2114	626	10000	967	171	4102
REGION V (Bicol Region)	10000	278	1481	3537	235	1575	10000	166	4850
REGION VI (Western Visayas)	833	171	1253	688	102	1772	1690	30	1096
REGION VII (Central Visayas)	1394	187	1567	1052	126	1560	1851	80	3675
REGION VIII (Eastern Visayas)	10000	834	5444	10000	493	10000	3627	1145	5716
REGION IX (Zamboanga Peninsula)	-	502	4467	-	357	3305	3548	482	1941
REGION X (Northern Mindanao)	4460	168	6525	1631	199	6817	10000	113	4430
REGION XI (Davao Region)	2248	626	2471	1394	521	2050	2356	150	10000
REGION XII (Soccsksargen)	-	347	2861	-	246	2832	-	153	2459
NATIONAL CAPITAL REGION (NCR)	159	291	650	134	465	901	432	450	471
CORDILLERA ADMINISTRATIVE REGION (CAR)	4235	530	10000	3899	288	10000	2727	127	10000

REGION XIII (Caraga)	-	868	6789	-	441	6051	-	122	10000
REGION IV-B (MIMAROPA)	-	3445	10000	-	1528	6870	-	335	10000
ARMM/BARMM*	-	1850	10000	-	2949	10000	-	2013	-

Note: - = No establishments were recorded; \*Republic Act No. 11054 (Organic Law for the Bangsamoro Autonomous Region in Muslim Mindanao), signed in 2018, introduced an expansion in the territorial jurisdiction of the former Autonomous Region in Muslim Mindanao (ARMM). The region was subsequently renamed the Bangsamoro Autonomous Region in Muslim Mindanao (BARMM). As a result, data from 2013 and 2017 is not directly comparable to data from 2021 due to changes in the region's boundaries and governance structure.

Source: ASPBI (2013, 2017, and 2021)

### 3.2.10 Market concentration of selected subclasses, national level (2021)

The market concentration in other subclasses in Sector J. Information and Communication are reported in this section. The number of establishments refers to the total number of establishments under the specific subclass across regions. To compute for the market concentration (i.e., CR-4 and HHI) at the national level, the market share for each establishment was computed based on the revenue of an establishment divided by the total revenue of all establishments nationwide.<sup>8</sup>

As Table 14 shows, most of the industries are highly concentrated. A couple of subclasses are unconcentrated ("Other computer programming activities" and "Other information technology and computer service activities") and another two are moderately concentrated ("Sound recording activities" and "Data processing").

**Table 14. Market concentration of selected subclasses at the national level (2021)**

Division/ Subclass	Industry description	Number of establish- ments	CR-4	HHI (computed value)	Market Type
<b>58</b>	<b>Publishing Activities</b>				
58110	Book Publishing	65	66%	2118	HC
58120	Publishing of directories and mailing lists	2	100%	5625	HC
58200	Software publishing	9	99.6%	4974	HC
58910	Other publishing activities	-	-	-	-
<b>59</b>	<b>Motion Picture, Video and Television Programme Production, Sound Recording and Music Publishing Activities</b>				
59111	Complete production of motion picture, video and television programme activities	13	88%	2621	HC
59112	Pre and main production of traditional and 2D animation	2	100%	6766	HC
59113	Pre and main production of 3D animation	3	100%	5224	HC

<sup>8</sup> Sub-class 59140 Motion picture projection activities was not included. Establishments in this category will only be able to serve their local communities rather than the national market.

59119	Pre and main production of other motion films and etc.	1	100%	10000	HC
59121	Post production of traditional and 2D animation	6	97%	6193	HC
59122	Post production of 3D animation	2	100%	5539	HC
59129	Post production of other motion films and etc.	2	100%	5163	HC
59130	Motion picture, video and television programme distribution activities	4	100%	5138	HC
59201	Sound recording activities	12	64%	1357	MC
59202	Publishing of music	28	97%	3425	HC
<b>60</b>	<b>Programming and Broadcasting Activities</b>				
60102	Radio program production	3	100%	6044	HC
60103	Radio broadcasting over the internet	4	100%	5393	HC
60202	Television program production	10	97%	4973	HC
60203	TV broadcasting over the internet	-	-	-	-
<b>62</b>	<b>Computer Programming, Consultancy and Related Activities</b>				
62011	Game design development	3	100%	7300	HC
62019	Other computer programming activities	289	19%	178	U
62020	Computer consultancy and computer facilities management activities	87	62%	2202	HC
62090	Other information technology and computer service activities	159	28%	329	U
<b>63</b>	<b>Information Service Activities</b>				
63111	Data processing	42	46%	1092	MC
63112	Website hosting services	21	91%	3892	HC
63113	Application hosting services	3	100%	6497	HC
63120	Web portals	4	100%	3759	HC
63910	News agency activities	2	100%	8067	HC

Notes: - = No establishments were recorded for the specific subsector.

## 4 Current challenges and opportunities

### 4.1 Industry restructuring

Traditional media has been affected by the increase in digitalization and migration of consumers to online platforms, motivating media companies to adopt, or worse, discontinue, some, if not all, of its services. The printing media have suffered from the shrinking readership during COVID-19, leading them to migrate to online platforms to survive. At least half of 60



community newspapers temporarily or permanently ceased printing and shifted online (VERA Files 2020). One of these community newspapers is the Baguio Midland Courier which ceased its operations in July 2024, after 77 years of existence since 1947. It used to have the highest circulation in Cordillera Administrative Region and it also created a website to expand audience reach. However, its closure was due to the decline of demand on print media, which confronts traditional newspaper media globally (Fokno 2024).

After eight years of operation, CNN Philippines (a predominantly English-language free-to-air channel) decided to close in the first quarter of 2024. Nine Media Corporation, a company that operates CNN Philippines, reached PHP5 billion in losses. One expert commented that the largely information-only platform focusing on news and talk shows is not viable in the Philippines. Media companies usually earn more revenue from the entertainment industry than the news industry. In addition, the proliferation of digital media presented viewers with more options (Atienza 2024). Despite the increase of revenue to 407.3 million in 2022 (an 18 million increase compared to 2021 revenue), it was not viable to continue operating CNN Philippines due to high operational costs. The license fee paid to Turner Broadcasting System amounted to PHP139.3 million in 2022, the airtime and satellite costs PHP83.4 million, and the general and administrative expenses reached PHP131.4 million. The campaign period did not affect revenue generation from traditional advertising since campaign efforts focused more on social media, and funds were transferred to social media influencers, bloggers, and content producers (Cordero 2024).

Consumer migration to streaming and Over-the-Top (OTT) platforms resulted in the shutdown of some local televisions. GMA Network is shutting down its two digital free-to-air subchannels, HallyPop and Pinoy Hits. The shrinking viewership resulted in a decline in advertising income and a shift to online advertising of brands. Furthermore, even when GMA Network's major competitor, ABS-CBN, shut down in 2020 and opened new TV stations (e.g., GTV, founded in 2021), it still experienced declining viewership due to the digital media. GMA Network previously discontinued two major regional network newscasts, "Balitang Southern Tagalog" and "Balitang Ilocandia" (MSN 2024).

Some media companies recognized the need to adjust to digitalization. For example, the Manila Times, the oldest newspaper publication founded in 1898, is one of the first to develop an internet edition. The business focused on improving its online presence rather than print due to the shift of viewers to online and is currently adopting a paywall for readers to access its online content (VERA Files 2024).

ABS-CBN Corporation, one of the leading broadcasting companies, shut down in May 2020 due to the non-renewal of its franchise. Nevertheless, it found an opportunity to provide services through digital innovation and collaboration. It strengthens its service offerings through streaming entertainment and news programs, digital movies, virtual events, music, and podcasts through digital platforms. Entertainment programs became available through its Facebook and YouTube accounts. It also offered English dubbed content to cater to a global audience and merged its services, iWant and TFC.tv, into iWantTFC to increase viewership in streaming services, containing original content, romcoms, series, movies, and documentaries. It also partnered with streaming platforms, WeTV iflix, Netflix, and Kumu, to launch/develop online content to widen audience reach (Choa 2021).

In 2022, the NTC assigned ABS-CBN's previously held frequencies to companies Advanced Media Broadcasting System, Inc. (Channel 16), Sonshine Media Network International

(AMBS)/Sug Media Corp. (Channel 43), and Aliw Broadcasting Corp. (Channel 23) (Cordero and Garcia 2022). In radio broadcasting, the National Broadcasting Corp. (NBC), a subsidiary of MediaQuest Holdings Inc., has been negotiating the sale of its radio assets to the Philippine Collective Media Corp. (PCMC). NBC has already signed blocktime and content licensing agreements with PCMC for FM Frequency 92.3 and regional radio stations (Jose 2024).

## 4.2 *Insights from industry*

This section is based on Key Informant Interviews conducted from October to November 2024. The discussion focused on the following issues: (a) the main challenges to competition in the media industry today; (b) the impact of technologies like AI, streaming platforms, and social media in reshaping competition in the media sector; (c) the strategies that media companies are using to overcome challenges to growth and stay competitive; (d) the policy and regulatory impediments to the growth and development of the media industry; and (e) types of government support that would be beneficial to the growth and development of the industry.

### 4.2.1 Competition in the media sector

With the increasing digitalization, the media landscape has expanded, including competition among national and international media companies composed of legacy media such as broadcasting and newspapers and non-traditional media like big techs owning search engines, social media, and live streaming platforms. The increasing shift to digital platforms consequently resulted in declining TV viewership and newspaper readership. Big tech companies also offer their own content, competing with small media organizations online, consequently gathering a significant portion of global ad revenue and decreasing the number of views for smaller media companies.

There is a shift from consuming traditional media content to patronizing social media and other digital platforms for media consumption. Many access the news through social media, which scoops news for hourly consumption, which traditional media may not be able to keep up with since professional news organizations and journalists prioritize accuracy rather than speed and need to vet their sources to abide by certain quality standards. Younger generations are more drawn to content creators who produce more relatable and less formal content. It is much easier today to be content creators and social media influencers than in the past when one needed to be involved in a media organization to distribute content.

### 4.2.2 Innovating business models

The legacy media industries are changing their business models to survive digitalization. Although news consumption is still high, advertising revenue has been declining. A significant factor is the rise of non-traditional media. The sector is currently working on addressing the shrinking revenues from advertisements since the rise of big tech companies, such as social media platforms, which offer less-expensive marketing outlets.

Many media companies are increasing their digital presence to capture content and advertising revenue. They gain revenues from various sources such as content monetization, advertisements/programmatic ads, memberships/subscriptions<sup>9</sup>, grants and donations from private organizations, corporate sponsorships, and subsidiaries (e.g., extending services to offer data analytics). They are trying to keep up with the technological trends by investing in website

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<sup>9</sup> However, this has not been very effective in the case of the Philippines, as people are used to consuming content for free.

creation, cybersecurity, and equipment, which incurs higher capital expenditures. Optimizing content and developing monetization strategies have been crucial for profitability in the digital space while still generating revenues from traditional media exposure.

#### 4.2.3 Adapting to new technologies and AI

Legacy media companies have embraced digital technologies by evolving into multimedia platforms with a presence in the digital space, such as creating websites and social media accounts. New technologies have proved their ability to increase productivity and efficiency and were eventually adopted by some media organizations and harnessed using ethical guidelines, despite the initial hesitations due to potential risks such as deepfakes and misinformation. For instance, AI has been used to process databases, create chatbots, and integrate with other processes to increase efficiency, augment human resources, and enhance products and services. News organizations produce various content on their websites and social media platforms, including long-form, short content, special reports, and opinions. It was also recognized that AI should not be relied on entirely, and human intervention is still needed, such as ensuring sources are reputable.

Media organizations collaborate to leverage digitalization by sharing best practices, resources, and expertise, adopting digital technology to improve operations and expand their audience. They invest in re-tooling and expanding human resources to increase their capacity to absorb new technologies and produce content on various platforms while utilizing traditional content generation. Some create sister companies or digital media units, hire staff with photography and videography skills, and create various types of content, such as print, podcasts, videos, and short clips.

#### 4.2.4 Retaining advantages amidst digitalization

To remain relevant in the media industry amidst the proliferation of social media, traditional media companies offer broader coverage of content. These include those that are only accessed and offered by media organizations (e.g., state of the nation addresses, calamity news reports), more comprehensive regional content relevant to local communities, and long-form and short-form content depending on audience preference. Their survival lies in ensuring the quality, integrity, transparency, professionalism, and ethical conduct of journalism and content creation, providing reliable and accurate information free from external pressures, and promoting freedom of information.

In contrast, news content on social media usually prioritizes short-form content and relies on algorithms to determine what viewers see, prioritizing engagement over accuracy and quality. This can lead to the spread of biased and misleading information, potentially harming consumers. In contrast, traditional media companies prioritize fact-checking, quality control, and providing proper context to their news stories, ensuring that the information they deliver is accurate, reliable, and informative. Some news organizations are also partnering with big tech companies to combat the spread of fake news by reviewing and verifying content.

Furthermore, the radio industry has been thriving in provincial communities, offering localized news, free from the algorithmic influences of big tech companies. This has been particularly important in poor communities, especially after the closure of ABS-CBN, a major free-to-air television broadcaster, as many households lack the means to pay for cable subscriptions.

#### 4.2.5 Policy and regulatory challenges

Some of the challenges that burden the media sector include limited access to government information, expensive access to SEC documents, attacks on media organizations, challenges in raising capital for media operations, constitutional limitations on foreign ownership of media, licensing requirements such as the legislative franchise, and difficulty in regulating big tech companies.

Although measures such as the freedom of information (FOI) and cybercrime prevention law exist, the poor execution of these mechanisms impedes the sector's growth. For instance, data from the FOI mechanism may take a long time to receive and may not ensure to provide essential information, compromising timely and transparent access to information. In addition, the economic and political environment also impacts the media industry's capacity to operate. This includes violence against media personnel and low incomes in some regions, particularly outside the National Capital Region, adversely affecting the viability of media outlets.

#### 4.2.6 Government support

Media organizations usually aim for independence to retain their credibility and fairness. They exist not only for profit also consider themselves as organizations providing public service. They would appreciate it if the government recognized their contribution to society and provided them with tax incentives, which are more appropriate than subsidies or funding to retain their editorial independence. Others suggested tax perks for those media companies relocating outside NCR and a lending facility that could offer media companies low-interest loans and flexible repayment options.

There are also proposals to impose a tax on social media platforms. However, its implementation might pose other risks, especially when Filipinos rely heavily on social media, creating leverage for these big technologies to retaliate, such as withdrawing their services. For instance, the Online News Act passed in Canada mandated big tech companies to compensate news organizations for the content they produce on their platform. However, Facebook responded by blocking Canadian news publishers and broadcasters, resulting in a significant decline in online engagement and digital ad revenue, adversely affecting media outlets, especially smaller businesses (Patterson 2024). There is also a suggestion to create special courts to examine cyber libel and fake news cases.

#### 4.2.7 Other concerns

It would be difficult to filter out facts from fake news, rumors, and propaganda posted on social media. Even the existing laws and policies cannot regulate the spread of misinformation and disinformation. Media consumption is changing, with more people being drawn to consume information from social media. Disinformation was already part of the media industry even before the digital era and would continue to exist. The rise of social media has exacerbated the problem, becoming a platform for spreading false information more rapidly and widely. For instance, the short length of social media content may often lack context. Some pseudo-journalists even gain huge earnings by stealing splices of content from news organizations, in contrast to a lower monetization rate for news content, while big tech companies remain uncooperative in addressing this practice.

It was noted that most media companies are owned by business oligarchs, politicians, or religious organizations, which can introduce biases in their content. In response, some consumers in other countries have shifted away from legacy media and turned to alternative platforms to counteract these biases. Therefore, credibility and public trust are essential for the survival of media companies.

A significant portion of the country's population lacks access to fixed broadband. Due to limited internet access, those with mobile broadband are more susceptible to manipulation by fake news and misinformation, especially when an individual is more exposed to social media than more credible sources. Additionally, the shrinking attention span due to digital media might negatively impact the quality of understanding and discourse on relevant topics.

In addition, a company observed that fewer young people are pursuing journalism or development communication, opting instead for careers with higher financial prospects. This trend could pose a challenge for the future of mass media, particularly in identifying the next generation of professionals to take over. Although the sector also absorbs workers from other fields, bringing new perspectives to the media industry.

## **5 Conclusion**

The Philippine media market is estimated to generate USD 6.5 billion in total revenue in 2024. Around 42 percent of the revenue will come from digital media, which has been growing faster than legacy media.

The government plays a very small role in media ownership, as almost all media companies are owned by private organizations. Several of the big media companies are family-owned, while a few are owned by religious institutions. Owners of some media companies also have significant commercial interests in other sectors.

Radio broadcasting is generally less concentrated compared to news publishing and TV broadcasting. Interestingly, the number of radio broadcasting establishments had generally increased from 2017 to 2021, representing less editorial concentration or a higher diversity of voices. With the exception of the NCR, MOCDI is lower in radio broadcasting compared to newspaper publishing or TV broadcasting. With respect to the other subclasses in the information and communication sector, most of the industries are highly concentrated.

Consumer preference is shifting to online media, but millions of Filipinos are still unconnected, particularly in terms of fixed broadband. The markets for wired and wireless internet access services outside the NCR remain highly concentrated. As observed from the results per region, internet access in facilities open to the public service activities seem to compensate for the lack of wired and wireless internet access services. Given the much higher penetration rate of mobile compared to fixed broadband in the Philippines (Serafica and Oren 2024), mobile telecommunications services and devices are the main conduits to digital media, limiting the types of activities and content formats that can be consumed.

### **Implications for policy and further research**

The government can adopt several policy measures to encourage the development of the media sector. Three strategies to improve access to mass media are also associated with promoting independence (Banerji et al. 2002): (1) removing barriers to entry, including restrictive

licensing and registration requirements, or introducing competition where there is a monopoly; (2) encouraging innovative private, community-led, and even nonprofit efforts to expand the reach of the media, especially in poor and remote areas; and 3) taking a broader development policy framework to enhance access by considering related factors such as literacy rates, establishing or strengthening journalism schools, and expanding the communications infrastructure.

### *Removing barriers to entry and expansion*

With digital technology, firms can expand into other segments in the media space and offer new services. Moreover, given the various emerging technologies, innovation can occur at different stages of the value chain.

Foreign ownership restriction in mass media significantly limits access to capital, technology, and expertise that are critical to remain competitive. Another barrier is the legislative franchise requirement, which is an unnecessary burden in the establishment and operation of telecommunications and broadcasting services (See Barcenas 2019; Serafica 2024).

### *Supporting media*

Challenges to the viability of news organizations not only threaten the availability and reach of media, but the quality as well. Fiscal incentives as suggested above could be considered, along with other measures to deal with the operational costs of transitioning to digitalization, for example. Increasing regulatory support and ensuring the sustainability of local journalism specifically can be justified on the basis that it should be considered a merit good, which must remain available despite changes in consumer preferences or market conditions (OECD 2021, Ali 2016). Additionally, evaluating the effectiveness of the Freedom of Information (FOI) Act and its implementation is crucial to supporting the work of public interest journalism.

### *Strengthening the broader policy environment*

The highly concentrated market for wired and wireless internet access services must be addressed. The passage of the Open Access to Data Transmission Act would foster competition and enable small players to enter the market, especially in underserved regions outside NCR. Despite having access to radio stations, special attention should also be given to the BARMM, which lacks establishments in newspapers, television, and telecommunications sectors. Improving literacy, including media and digital literacy for all age groups, will also complement the development of the media sector.

### *Recommendations for further research*

The layered media model served as a guide to map out media ownership in the Philippines. The standard measures of market concentration, CR4 and HHI, were used in this study to analyze the competition landscape. As a next step, network analysis showing the interconnectedness of the owners of the different media organizations could be pursued to understand the direct and indirect links between competitors. It could also reveal the degree to which firms cooperate through joint businesses or other common interests (See, for example, Birkinbine and Gómez 2020 and Tabuga et al. 2024).

This paper also used the standard industry classification to determine market concentration. Despite the blurring of industry lines due to digitization, it is still useful to examine discrete segments since these forms of media continue to serve as key sources of information, particularly for households with inadequate internet connectivity. Thus, market concentration and diversity in legacy media markets remain relevant issues. Increasingly, however, analytical approaches that are more applicable for converged markets and capture the various horizontal, vertical, and diagonal relationships among the different players will be valuable in understanding the evolving competition landscape of the media sector.

## 6 References

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## 7 Annex 1. Layer 1 and 2 of the Media Model: Media Companies

**Table 15. ABS-CBN Corporation (1946)/Lopez (70%), PCD Nominee Corp. (26%), ABS-CBN employees (0.25%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	<a href="https://news.abs-cbn.com/">https://news.abs-cbn.com/</a>
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	ABS-CBN News Channel, Kapamilya Channel, CineMo, Jeepney TV, Cinema One, Knowledge Channel, Metro Channel, Myx (TV); <a href="https://www.abs-cbn.com/">abs-cbn.com</a> , , <a href="https://www.iwanttfc.com/">https://www.iwanttfc.com/</a> , <a href="https://ent.abs-cbn.com/">https://ent.abs-cbn.com/</a>
Movies	Cinemas, Broadcast TV, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	ABS-CBN Films, Cinescreen
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	DWPM Radyo 630
Advertising	TV, Radio, Mail, Magazines Cable, Satellite, Mobile devices & PDAs, E-mail	Medianow Strategies, Inc. (Medianow
Telecommunications	Phone Networks Mobile Networks, Cable Networks, Internet Telephony (VOIP), IM	ABS-CBN Telecom North America, ABS-CBN Convergence, Inc
Online Content & Services	Phone, cable & wireless networks, IM, Portals, Blogs, Search Engines, Social Network Sites, RSS aggregators	<a href="https://push.abs-cbn.com/">https://push.abs-cbn.com/</a> , <a href="https://www.starmagicph.com/">https://www.starmagicph.com/</a> , Starstudio.ph
<b>Other Business:</b> Digital film archiving and central library, content licensing and transmission - ABS-CBN Big Deeper; Cable and satellite programming services - ABS-CBN Europe, ABS- CBN Japan, ABS-CBN Middle East, ABS-CBN International, ABS-CBN Australia, ABS-CBN Canada; Content development, publishing and programming services (pay TV channels and PPV) - Creative Programs, Inc. (CPI); Services (money remittance) - ABS-CBN Europe Remittance Inc, E-Money Plus, Inc, ABS-CBN Global Remittance Inc, ABS-CBN Canada Remittance Inc., ; Educational/training - ABS-CBN Center for Communication Arts, Inc.; Non-vessel operations common carrier - ABS-CBN Global Cargo Corporation; Real estate - ABS-CBN Integrated and Strategic Property Holdings, Inc.; Services (support) - ABS-CBN Shared Service Center PTE. Ltd, Probabilistic Insights, Inc., Probabilistic Insights, Inc., Daum Kakao Corporation (50%), The Flagship, Inc. (40%); Services (production) - Professional Services for Television & Radio, Inc.; Services (livestock) - Grassfed Corporation; Content development and programming services - Sarimanok News Network, Inc; Services (restaurant and food) - The Chosen Bun, Inc. (Chosen Bun), TV Food Chefs, Inc.;		

Service (call center) - iConnect Convergence, Inc.;

Production facility - ABS-CBN Studios, Inc.;

Management of locations - ABS-CBN Themed Experiences;

Theme park - Play Innovations, Inc., Play Innovations Hungary Kft;

Cable television services - Sky Cable Corporation (Sky Cable), Bisaya Cable Television Network, Bright Moon Cable Networks, Inc., Cavite Cable Corporation, Cepsil Consultancy and Management Corporation, Davao Cableworld Network, Inc., HM Cable Networks, Inc., HM CATV, Inc., Hotel Interactive Systems, Inc., Isla Cable TV, Inc., Moonsat Cable Television, Inc., Pilipino Cable Corporation (PCC), Satellite Cable TV, Inc., Sun Cable Systems Davao, Inc., Sunvision Cable, Inc., Tarlac Cable Television Network, Inc., JMY Advantage Corporation, Cebu Cable Television, Inc., Suburban Cable Network, Inc., Pacific CATV, Inc. (Pacific), First Ilocandia CATV, Inc., Mactan CATV Network, Inc., Discovery Mactan Cable, Inc., Home-Lipa Cable, Inc.;

Radio production - Media Serbisyo Production Corporation (49%);

Holding company - ABS-CBN Global Ltd., ABS-CBN Global Hungary Kft., Makati Kft., Rosetta Holdings Corporation (RHC), Callirrhoe, Inc., Eukelade Holding Corporation, Sapientis Holdings Corporation (Sapientis), Columbus Technologies, Inc. (CTI), ABS-CBN Theme Parks and Resorts Holdings, Inc., Sky Vision Corporation (Sky Vision), Sun Cable Holdings, Incorporated (SCH), Telemondial Holdings, Inc.; Marketing, sales, and advertising - Medianow Strategies, Inc.

**Table 16. Signal TV Inc./MediaQuest Holdings, Inc. (1999)**

Product/Content	Distribution Mechanism	Media outlet/operator
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	One PH (2019)

**Table 17. Philstar Media Group/Pangilinan (?%), Belmonte (20%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	The Philippine STAR (1986), Pilipino Star Ngayon (1994), Banat News (1994), Philstar.com (2000), The Freeman, Pang-Masa, PeopleAsia, BusinessWorld (print); philstar.com, Interaksyon (online)

**Table 18. TV5 Network Inc./MediaQuest Holdings, Inc. (1999)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	News5 (news5.com.ph/news.tv5.com.ph) (2012)
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	TV5 (1960)

Movies	Cinemas, Broadcast TV, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	92.3 Radyo5 True FM (2010)

**Table 19. GMA Network, Inc. (1950)/Gozon (30%), Jimenez (27%), Duavit (16%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	GMA News online (2006), DZBB 594 Super Radyo (radio online streaming)
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	GMA 7 (1961), GTV (2021), Citynet Network Marketing and Productions, Inc. (1994), GMA Entertainment Online
Movies	Cinemas, Broadcast TV, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	GMA Network Films, Inc. (1995)
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	DZBB 594 Super Radyo (1950), RGMA Network, Inc
Music Audio	Radio, Records, Tapes Broadcast Radio, Satellite Radio, Internet Sites & Online Stores, Podcasts, P2P	GMA Productions, Inc. (GMA Music) (1997)
Advertising	TV, Radio, Mail, Magazines Cable, Satellite, Mobile devices & PDAs, E-mail	GMA Worldwide (Philippines), Inc. (1996), GMA Marketing & Productions, Inc. (1980), Digify, Inc. (2011)
Online Content & Services	Phone, cable & wireless networks, IM, Portals, Blogs, Search Engines, Social Network Sites, RSS aggregators	GMA New Media, Inc. (2000), Mediamerge Corporation (2002), INQ7 Interactive, Inc.*, Philippine Entertainment Portal, Inc.
<p>Other Business:</p> <p>Digital media and technology - GMA New Media, Inc. (2000);</p> <p>Television entertainment production - Citynet Network Marketing and Productions, Inc. (1994);</p> <p>Film production - GMA Network Films, Inc. (1995);</p> <p>International marketing and syndication - GMA Worldwide (Philippines), Inc. (1996);</p> <p>Music recording, publishing, and video distribution - GMA Productions, Inc. (GMA Music) (1997);</p> <p>Production Logistics - Scenarios, Inc. (1996)*;</p> <p>Production Logistics - Script2010, Inc. (1997);</p> <p>Pre- and post-production services - Alta Productions Group, Inc. (1988);</p> <p>Exclusive marketing and sales - GMA Marketing &amp; Productions, Inc. (1980);</p> <p>Online publishing/advertising initiatives - Mediamerge Corporation (2002);</p> <p>Advertising and other forms of promotion - Digify, Inc. (2011);</p> <p>Investment and diversification - GMA Ventures, Inc. (2021);</p>		

Internet publishing - INQ7 Interactive, Inc.\*;  
 Online publishing and advertising - INQ7 Marketing Inc (US Subsidiary) (50%);  
 Internet publishing - Philippine Entertainment Portal, Inc.;  
 Real estate - Mont-Aire Realty and Development Corp.;  
 GMA Kapuso Foundation Inc (common stockholder);  
 GMA Holdings, Inc. (common stockholder);  
 Sportsbetting and broadcasting - Gamespan Inc. (50%);  
 TV, Music, and Film Production - Ninja Graphics Inc (51%)

**Table 20. Brigada Mass Media Corporation (2010)/Catulpos (99.98%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	Brigada News Philippines* (2005), <a href="http://www.brigada.ph">www.brigada.ph</a>
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	BTV
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	Brigada News FM
<b>Other Business:</b> Pharmaceuticals - Brigada Healthline Corp., Brigada Pharmacy Inc. Hospitality - Brigada Hospitality Group, Kap Alfredo Restaurant and Garden, Seth's Indoor Playhouse Construction - Build Dreams Construction, Inc., Build Rocks Aggregates, Inc. Security - Secret Eye Protective Service, Inc., Global Dynamic Star Security Agency, Inc. Logistics - Brigada Distributions, Inc. Charity - Brigada 1Tahanan		

**Table 21. Eagle Broadcasting Corporation (1968)/INC (100%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	Eagle News
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	NET25 (2000)
Movies	Cinemas, Broadcast TV, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	EBC Films
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	DZEC Radyo Agila 1602 (1968), Bee Cool FM, INC Radio
Music Audio	Radio, Records, Tapes Broadcast Radio, Satellite Radio, Internet Sites & Online Stores, Podcasts, P2P	EBC Music Department, E25 Records

**Other Media Business:**

Broadcast - Peñafrancia Broadcasting Corporation;

Talent management - NET25 Star Center

Others:

Real estate - Philippine Arena

Hospital - New Era General Hospital, Eraño Manalo Medical Center, Inc.

Education - New Era University

**Table 22. Far East Broadcasting Company (Philippines), Inc. (1946)/ Castillo (?%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	febc.ph
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	DZAS 702 (1948)
Online Content & Services	Phone, cable & wireless networks, IM, Portals, Blogs, Search Engines, Social Network Sites, RSS aggregators	febc.ph

**Table 23. Inquirer Holdings, Inc./Rufino-Prieto (100%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	The Philippine Daily Inquirer, Bandera, Inquirer Libre, Forbes In Touch, Dasmariñas Village Gazette, Southern Living, Northern Living, Turista, Multisport Philippines, Soul BGC, F&B World magazine (print); Inquirer.net, cebdailynews.inquirer.net (online)
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	Inquirer Radio DZIQ 990
<b>Other Media Business:</b> Publications - Hinge Inquirer Publications, Inquirer Publications; Printing - Lexmedia Digital, Inc., FEP Printing Corporation, Alliance Media Printing, Inc.; Content production - Megamobile  <b>Other Business:</b> Real Estate - Lexmedia Realty, Inc. Logistics - Delivery Access Group Xpress Courier Education - Inquirer Academy Investment - Mediacom Equities, Inc.		



**Table 24. Interactive Broadcast Media, Inc. (1994)/Canoy (99.9%)**

<b>Product/Content</b>	<b>Distribution Mechanism</b>	<b>Media outlet/operator</b>
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	774dwww.ph
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	DWWW 774 (1996)
Advertising	TV, Radio, Mail, Magazines Cable, Satellite, Mobile devices & PDAs, E-mail	Echo Media Marketing Innovations Corp.
<b>Other Business:</b> EDCanoy Prime Holdings, Inc. - Kinaiya Ventures, Inc. (nature park in Cavite)		

**Table 25. Manila Bulletin Publishing Corporation/Yap (78%), Menzi Trust Fund, Inc. (8%), PCD Nominee Corporation (5%)**

<b>Product/Content</b>	<b>Distribution Mechanism</b>	<b>Media outlet/operator</b>
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	Balita, Manila Bulletin Online

**Table 26. The Manila Times Publishing Corporation (1898)/Ang (100%)**

<b>Product/Content</b>	<b>Distribution Mechanism</b>	<b>Media outlet/operator</b>
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	The Manila Times, The Sunday Times Magazine; The Manila Times Online

**Table 27. MBC Media Group (1946)/Elizalde (90%), Ortillo (8%), PCD Nominee Corporation (0.51%)**

<b>Product/Content</b>	<b>Distribution Mechanism</b>	<b>Media outlet/operator</b>
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	DZRH News (dzrh.com.ph)
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	DZRH News Television
Movies	Cinemas, Broadcast TV, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	DZRH Nationwide 666, Aksyon Radyo network, 90.7 Love Radio, 101.1 Yes! The Best, Radyo Natin network, 96.3 Easy Rock (broadcast radio); dzrh.com.ph (9% audience share), radyonatin.com,

		aksyonradyo.com.ph, Aksyonradyobacolod.com.ph, Aksyonradoiloilo.com.ph, yesthebest.com, Loveradio.com.ph, Easyrock.com.ph (online radio)
Music Audio	Radio, Records, Tapes Broadcast Radio, Satellite Radio, Internet Sites & Online Stores, Podcasts, P2P	
Advertising	TV, Radio, Mail, Magazines Cable, Satellite, Mobile devices & PDAs, E-mail	
Telecommunications	Phone Networks Mobile Networks, Cable Networks, Internet Telephony (VOIP), IM	
Photography	Cameras Digital cameras, Camcorders, Mobile devices & PDAs, Internet & Online Stores	
Online Content & Services	Phone, cable & wireless networks, IM, Portals, Blogs, Search Engines, Social Network Sites, RSS aggregators	
Video Games	Video game platforms, Discs, Computer software, Internet & Online stores, Mobile networks	
<b>Other Business:</b> Elizalde Hotels and Resorts, Inc (80%); Feliz Hotel Boracay, Inc. (80% di ownership)		

**Table 28. Nine Media Corporation\*/Nicolas-Suchianco (100%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	CNNPhilippines.com
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	CNN Philippines

\*CNN Philippines Shut down due to significant financial losses

**Table 29. Prage Management Corporation (2018)/Cabacungan (50%), Marfil (50%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	Abante (1987), Abante Tonite, NewsKO, Celebrity Radar (print); tnt.abante.com.ph, abante.com, bilyonaryo.com, politiko.com.ph, Fastbreak.com.ph, Abogado.com.ph, Radyo Tabloidista, Teletabloidista (online)

**Table 30. Presidential Communications Office/OP**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	<a href="https://pia.gov.ph/">https://pia.gov.ph/</a> , <a href="http://www.pna.gov.ph">www.pna.gov.ph</a> , <a href="https://ptni.gov.ph/">https://ptni.gov.ph/</a> , <a href="https://rtvm.gov.ph/">https://rtvm.gov.ph/</a> , <a href="https://pbs.gov.ph/">https://pbs.gov.ph/</a>
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	People's Television Network, Inc.
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	Radyo Pilipinas Uno DZRB 738, <a href="https://radyopilipinas.ph/rp-one">https://radyopilipinas.ph/rp-one</a>

**Table 31. Progressive Broadcasting Corporation (1986)/Henares (61%), Communication Trend Gateway, Inc. (24.5%), Communication Headway Unlimited Inc. (14.50%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	untvweb.com
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	UNTV (2001)

**Table 32. Radio Mindanao Network, Inc. (RMN) (1961)/Canoy (87%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	DZXL 558 Manila (Radyo Trabaho) (1962)
Advertising	TV, Radio, Mail, Magazines Cable, Satellite, Mobile devices & PDAs, E-mail	RMN Networks Marketing and Media Ventures, Inc. (70%)

**Table 33. Radio Veritas Global Broadcasting System, Inc. (1987)/The Catholic Church through the Archdiocese of Manila (75%), Gonzalez (13%), Cojuangco (12%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	Veritasph.net
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	DZRV 846 (Radio Veritas)

**Table 34. Rappler Holdings Corporation (2011)/Bitanga (31%), Ressa (24%), So (18%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	Rappler.com (2012)

**Table 35. Sison's Publishing House, Inc./Sison (100%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	Bulgar (1990), bulgaronline.com

**Table 36. SunStar Publishing, Inc. (1996)/Garcia (70%), Gaisano (23%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	Superbalita, SunStar (print); Sunstar.com.ph

**Table 37. Swara Sug Media Corporation (1992)/Quiboloy (??%)**

Product/Content	Distribution Mechanism	Media outlet/operator
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	smninewschannel.com (online); Pinas, Pinas USA, Pinas Canada (print)
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	SMNI News Channel, Dzar1026.ph, pinasglobal.com
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	Sonshine Radio
Other businesses		Media business: Pre- and post-production services, Music recording, Set design, Audio-visual presentations, Online media services

**Table 38. ZOE Broadcasting Network, Inc. (1992)/Villanueva (92.5%)**

<b>Product/Content</b>	<b>Distribution Mechanism</b>	<b>Media outlet/operator</b>
Print News & Literature	Newspaper & Magazine Delivery, Internet sites, Software, Mobile devices	
Television Programming/Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	A2Z, Light TV Channel 33 (1998)
Movies	Cinemas, Broadcast TV, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	
Radio Programming *Merged with Audio in the 80s	Broadcast Radio Stations	Radyo Calabarzon