Funding Journalism: Spain

**SOURCES OF FUNDING**

**Shifts in Journalism Funding**

**Analysis of the key findings in this chapter (to be done later)**

**A similar table as the one below summarizing the key players and sources of influence to be created (to be done later)**

**Who’s who in Spanish media**

**The key influencers in the largest media in Spain**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Influence | Operator | Prominent news media assets | | | | Annual income 2016 (BGN m) |
| TV | Radio | Print | Online |
| Government | BNT | XXX | XXX | - | - |  |
| MTG, Didier Stoessel | Nova Broadcasting Group | Nova (X channels) | - | Lenta, AtticaEva | Netinfo | 164.6 |
| CME, Krassimir Gergov | bTV Media Group | bTV (5 channels) | N-Joy  Z-Rock  Jazz FM  bTV Radio  Classic FM | - | - | 124.8 |
| Delyan Peevski | Media group owned by Peevski | - | - | Telegraf  Monitor  Meridian  Match  Politica  Borba  Europst | - | 25.3 |
| Venelina Atanasova Gocheva, Dimitar Marinov Dimitrov | Media Group Bulgaria | - | - | 24 Chasa  168 Chasa | Trend.bg | 14.5 |
| Ivo Prokopiev, Teodor Zahov | Economedia | - | - | Capital  Dnevnik | - | 7.8 |
| Ivo Kamenov, Marin Mitev | Investor.bg | - | - | Bloomberg | Investor.bg | 6.0 |
| Free Media Group | S Media | - | - | Sports |  | 2.0 |
| Boyan Tomov, Progress 2010 | Media Ikonomica Bulgaria | - | - | Ikonomica | Economic.g | 0.9 |

Source: CMDS, 2018

**Popular News Media**

***Consumption Trends***

Television remains a highly consumed medium in Spain with 240 minutes on average a day spent in front of television in 2017. Although the figure was four minutes less than four year earlier, it still shows the resilience of television among the Spanish audiences. This being said, the viewership figures include the time spent both on traditional television and on on-demand platforms that use varied ways of reception, the most popular being streaming.

The most common mode of television reception in Spain is digital terrestrial, either free-to-air, using an antenna or a digital set-top box. More than 77% of all television households get access to television broadcasts terrestrially, according to data from Kantar Media. Cable and IPTV follow with shares of 10.2% and 9.2%, respectively. Digital satellite accounts for only 2.9% of television reception in Spain.

But in spite of the popularity of terrestrial transmission of television programs, pay-TV has seen a dramatic growth in the Spanish television programming market in recent years. In 2017, pay-TV accounted for 22.3% of the total television reception, a historically high record. Of Spain’s 18.4 million of households in 2017, nearly 6.1 million households, meaning more than 15 million people or a third of the total number of consumers in Spain, had some sort of subscription to pay-TV, the most popular being IPTV.

**Paying for television**

**Pay-TV subscription market in Spain, by delivery and operator, 2017 [update 2018?]**

|  |  |  |  |
| --- | --- | --- | --- |
| Delivery platform | Number of subscriptions | Key pay-TV players | Number of subscriptions |
| IPTV | 3,483,000 | Movistar | 3,646,984 |
| Cable TV | 1,512,000 | Vodafone | 1,278,000 |
| Satellite TV | 857,000 | Orange | 493,000 |
| Web TV | 241,000 | Euskaltel | 269,708 |
|  |  | Wuaki | 148,260 |
|  |  | Telecable | 126,000 |
|  |  | Other operators | 183,402 |

Source: National Market and Competition Commission (*Comisión Nacional de los Mercados y la Competencia*, CNMC)

American-owned group Netflix leads on the online streaming market, with 1.16 million subscribers, accounting for over 7% of all households connected to the internet in the country, according to a CNMC reported from 2017. The launch in 2018 of Netflix’s first film production hub for Europe in Madrid has led to a boom in Netflix-original Spanish film production as well as to the expansion of Netflix’s production, co-production and distribution deals with Spanish television producers, including Atresmedia and Forta (an alliance of regional television stations). Netflix’s closest competitor is HBO, in operation for nearly two years on the Spanish market, with some 414,000 subscribers (2.6% of total households with internet access). Other players on the streaming market include Amazon Prime Video (175,000 subscribers and 1.1% share), BeIN Channel/Total channel (191,000 and 1.2%), Wuaki (127,000 and 0.8%), Filmin (16,000 and 0.1%) and Sky (which began operations in 2017-2018).

The internet has had a dramatic impact on news media consumption in Spain. The internet penetration reached 80% of Spain’s population in 2017 **[update 2018?]**, a significant jump from only 53% seven years earlier. That turned the internet into major competitor for television. The time spent by Spanish citizens consuming online news has trebled between 2010 and 2017 to 118 minutes.

**Media mix**

**Media penetration in Spain, %, 2018**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Year | Population ('000) | Daily papers | Magazines | Total radio | Television | Internet\* |
| 2009 | 39,462 | 39.8 | 51.3 | 55.3 | 89.0 | 49.3 |
| 2010 | 39,435 | 38.0 | 50.4 | 56.9 | 87.9 | 53.0 |
| 2011 | 39,485 | 37.4 | 48.9 | 58.5 | 88.5 | 57.1 |
| 2012 | 39,449 | 36.1 | 45.4 | 61.9 | 89.1 | 60.4 |
| 2013 | 39,331 | 32.4 | 43.4 | 61.5 | 88.7 | 64.5 |
| 2014 | 39,681 | 29.8 | 41.0 | 61.0 | 88.6 | 69.3 |
| 2015 | 39,724 | 28.5 | 38.5 | 60.1 | 88.3 | 74.1 |
| 2016 | 39,716 | 26.5 | 35.2 | 60.0 | 87.8 | 77.3 |
| 2017 | 39,783 | 24.3 | 32.8 | 59.3 | 85.2 | 80.3 |
| 2018 | 39,852 | 22.8 | 29.7 | 57.5 | 85.0 | 82.1 |

\*last 30 days

Source: Association for Media research (*Asociación para la Investigación de Medios de Comunicación*, AIMC)

Online, the most popular activity in Spain is reading the news, with nearly 85% of people doing that. It is followed by watching online videos on platforms such as YouTube, which is what 81.3% of Spaniards say they do online. People are increasingly using their television sets to browse the internet (internet access was available via television sets to 33.3% of the sets used in Spain in 2017), which is a strong indicator that the online space continues to change fast, further changing consumption habits and the overall media market. Media consumption is gradually moving online, mostly through mobile devices and social networks, of which Facebook is by far the most popular in Spain.

Consumption of online content has been growing fast, the number of minutes devoted daily to internet browsing in Spain having increased from 91 in 2013 to 118 in 2017. In contrast, consumption of content on television, radio and print media declined between the years 2013 and 2017.

The migration online has deepened the generational gaps. Younger generations have been moving fast to the internet and mobile platforms. In contrast, radio and print are primarily consumed by older people. The newspaper industry, in fact, has been the sector most affected by the internet in Spain. More than 44% of people in Spain read newspapers only online. Newspaper penetration is the highest in Asturias and Galicia, two of the Spanish regions with the highest rate of elderly population.

**Reading habits**

**How people read newspapers in Spain, 2017 [update 2018?]**

|  |  |
| --- | --- |
| Don’t usually read the newspaper | 12.9 |
| Just the printed edition | 7.6 |
| Just the electronic edition | 44.2 |
| Both printed and electronic | 35.3 |

Source: AIMC, 2017

**Media: regional tastes**

**Media penetration in autonomous regions of Spain, % of total population, 2017 [update 2018?]**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Region | Population ('000) | Daily papers | Magazines | Radio\* | Television\* | Internet\*\* |
| Andalucia | 7,143 | 17.9 | 25.3 | 57.6 | 86.7 | 77.5 |
| Aragon | 1,139 | 29.9 | 38.5 | 63.6 | 92.0 | 75.7 |
| Asturias | 927 | 41.0 | 41.4 | 58.1 | 88.2 | 72.8 |
| Baleares | 973 | 28.7 | 29.4 | 57.8 | 73.7 | 77.2 |
| Canarias | 1,862 | 23.1 | 34.4 | 56.5 | 83.9 | 76.4 |
| Cantabria | 507 | 32.7 | 23.5 | 65.4 | 87.7 | 76.0 |
| C. Leon | 2,163 | 31.2 | 43.3 | 62.8 | 89.3 | 69.0 |
| C. La Mancha | 1,750 | 15.5 | 29.7 | 56.5 | 89.6 | 70.2 |
| Cataluna | 6,315 | 25.0 | 34.7 | 60.5 | 80.5 | 78.0 |
| C. Valenciana | 4,235 | 19.1 | 33.4 | 56.3 | 82.6 | 73.5 |
| Extremadura | 942 | 20.1 | 22.9 | 56.6 | 92.4 | 70.9 |
| Galicia | 2,407 | 40.0 | 37.1 | 62.0 | 84.7 | 66.3 |
| Madrid | 5,506 | 19.2 | 35.6 | 60.3 | 84.8 | 81.5 |
| Murcia | 1,228 | 18.5 | 25.8 | 55.8 | 87.4 | 75.4 |
| Navarra | 544 | 37.7 | 38.8 | 64.3 | 89.0 | 77.6 |
| P. Vasco | 1,872 | 37.4 | 32.0 | 63.0 | 89.4 | 75.9 |
| La Rioja | 269 | 36.5 | 36.5 | 64.1 | 89.6 | 69.9 |
| Total | 39,783 | 24.3 | 32.8 | 59.3 | 85.2 | 75.7 |

\*daily total audience; \*\*use the day before

Source: AIMC, 2017

Radio consumption has also registered a significant decline in the last five years, partly as a result of the growing popularity of the internet. Radio was a highly popular medium in Spain, with a penetration of 61.5%, next most popular to television. But in 2017, it declined to 59.3%, being surpassed by internet, according to data of the General Study of Media (*Estudio General de Medios*, EGM). Radio mostly lost listeners in the young age segment (from 14 to 34 years of age). In contrast, it remained popular among the elderly.

***Key Players***

*Television*The development of television in Spain has been characterized by five key economic and strategic issues in the past decade. First, the economic crisis has badly ravaged the Spanish economy, affecting also the media. Secondly, several newly introduced laws that barred the public service broadcaster from carrying advertising and helped relax management rules in the public media, both at national and regional levels, affected the overall media market. Third, the end of analogue television signal in 2010 resulted in a series of important changes in the distribution of new digital channels. Then, concentration of ownership in commercial television continued to accelerate particularly after the takeover in 2011-2012 by Mediaset España and Atresmedia of more television channels. Finally, a series of acquisitions (including the takeover by the mobile operator Telefónica Movistar of the satellite pay-TV platform Digital+, and of the main stake in Digital+ by Prisa) further affected the market.

Following the financial crisis the group of four major private broadcasting groups on the Spanish market has been reduced to two: Mediaset and Atresmedia. The crisis also led to drastic cuts in investment and the restructuring of the public broadcaster. It was accompanied by a severe fall in ad revenues and galloping losses, particularly in the period 2012-2014. As of 2015, the main television and radio broadcasters began to recover, increasing turnover and returning to profitability.

Following two mega-mergers on the television market, the two largest private broadcast groups by audience in Spain, Mediaset and Atresmedia, command jointly more than 55% of the audience. They are followed by the public broadcaster RTVE, with an audience share of 16.7% in 2017. Mediaset España is majority owned by Mediaset Italia with the remainder of the shares (a stake of over 48%) floated on the stock exchange. The majority stake in Atresmedia is co-owned by the Spanish group Planeta and the Italian company De Agostini. Together, they have a combined 41.7%. Germany’s UFA/RTL (Bertelsmann) has a stake of nearly 19% in Atresmedia. Other players, Imagina and Mediapro (founders of La Sexta) together own some 4% of the company. Veo TV is also under Italian control (through the Cairo-RCS group). Net TV’s majority shareholder is Vocento, with other large parts of the company in the hands of the corporations Viacom and Walt Disney.

All in all, the free-to-air private television market in Spain has capital from Italy, Spain, North-America and Germany (as well as the Catholic Church, which owns 13TV).

The pay-TV market is dominated by Telefónica Movistar and Vodafone, and a few over-the-top content platforms. The merger between Mediaset and Cuatro in 2011, and between Telefónica Movistar and Digital three years later were prompted by the need to clear debts that had been incurred by the Prisa newspaper group (because of a series of bad deals the group made in 2008 right after the financial crisis hit). Another deal promoted by the global financial crisis was the purchase of Recoletos (a publisher of sports and economic dailies and magazines) by UNEDISA. The high price of the deal hobbled UNEDISA.

When it comes to individual channels, Telecinco has had the highest viewership for six years in a row in spite of a constant decline in audience, which all free-to-air television channels have been confronted with in recent years.

Although television has remained a resilient medium during the past decades of major changes triggered by technology, news programming on television has seen its popularity decline. All-news television has become less popular as generalist and thematic channels have drawn growing audiences in Spain. After the closure in 2010 of the privately run all-news channel CNN (property of the Prisa group), Spain has now only one all-news channel, the publicly owned 24h, which is run by RTVE corporation.[[1]](#footnote-1) **[we need more references in the text, follow the ref example in the footnote]**

News programming on generalist television has also been trimmed. Broadcast time for news programming has been declining between 2013 and 2017 from an average of 21.2% to 8.9% of total airtime. Privately owned regional broadcasters lead in the news segment with 26.8% of the total airtime. They are followed by free-to-air public television with 10.4%. *(See Regional Television below)* There is practically no news on pay-TV and thematic free-to-air channels as most of their programming is filled with entertainment, fiction and sports.

Telecinco leads in newscast audience with 14.2% (including its midday-afternoon and night newscasts), followed by the public broadcast channel La1 with 13.9% and the private channels Antena3 (12.6%), La Sexta (9.8%) and Cuatro (7.1%), according to data from Kantar Media. Paradoxically, Telecinco devotes less time to news and information than other television channels, but gets more eyeballs than its competitors.

**The television players**

**Most watched television stations in Spain, nationwide, by 2017 audience share (%), 2013-2017 [update, 2018?]**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Free-to-air television channels, audience share (%) | | | | | | | |
|  | 2013 | 2014 | 2015 | 2016 | 2017 | Operating company | Majority owner |
| Telecinco | 13.5 | 14.5 | 14.8 | 14.4 | 13.3 | Mediaset | Mediaset Italia |
| Antena3 | 13.4 | 13.6 | 13.4 | 12.8 | 12.3 | Atresmedia | Planeta y Bertelsmann |
| La1 | 10.2 | 10.0 | 9.8 | 10.1 | 10.4 | RTVE | Public service |
| La Sexta | 6.0 | 7.2 | 7.4 | 7.1 | 6.8 | Atresmedia | Planeta y Bertelsmann |
| Cuatro | 6.0 | 6.7 | 7.2 | 6.5 | 6.2 | Mediaset | Mediaset Italia |
| FDF | 2.9 | 3.5 | 3.5 | 3.2 | 3.1 | Mediaset | Mediaset Italia |
| La2 | 2.4 | 2.8 | 2.7 | 2.6 | 2.6 | RTVE | Public service |
| Neox | 2.3 | 2.6 | 2.6 | 2.5 | 2.5 | Atresmedia | Planeta y Bertelsmann |
| Nova | 2.1 | 2.5 | 2.4 | 2.2 | 2.2 | Atresmedia | Planeta y Bertelsmann |
| Divinity | 1.7 | 2.1 | 2.3 | 2.3 | 2.2 | Mediaset | Mediaset Italia |
| TRECE | 1.3 | 1.6 | 2.0 | 2.1 | 2.1 | Grupo COPE | Conferencia Episcopal |
| Energy | 1.2 | 1.5 | 1.5 | 1.9 | 2.0 | Mediaset | Mediaset Italia |
| Clan | 2.4 | 2.3 | 2.4 | 2.2 | 1.9 | RTVE | Public service |
| Paramount Channel | 1.4 | 1.9 | 2.0 | 1.8 | 1.9 | Net TV (Vocento) | Vocento & Viacom |
| DMAX | 1.6 | 2.1 | 2.1 | 1.9 | 1.7 | Unidad Editorial | RCS-Urbano Cairo, Italia |
| Boing | 1.7 | 1.7 | 1.6 | 1.5 | 1.3 | Mediaset | Mediaset Italia |
| Disney Channel | 1.5 | 1.5 | 1.4 | 1.1 | 1.1 | Net TV (Vocento) | Vocento & Viacom |
| Teledeporte | 0.9 | 0.9 | 0.9 | 0.9 | 0.7 | RTVE | Public service |
| 24H | 0.8 | 0.8 | 0.9 | 0.9 | 1.0 | RTVE | Public service |
| Mega | \* | \* | 0.9 | 1.8 | 1.8 | Atresmedia | Planeta y Bertelsmann |
| Atreseries | \* | \* | \* | 0.8 | 1.1 | Atresmedia | Planeta y Bertelsmann |
| DKISS | \* | \* | \* | 0.4 | 0.9 | Kiss Media | Radio Blanca SA (Blas Herrero Fernández) |
| Be Mad | \* | \* | \* | 0.4 | 0.6 | Mediaset | Mediaset Italia |
| TEN | \* | \* | \* | 0.3 | 0.4 | Ten Media S.L. | Cardomana Servicios y Gestiones S.L. |
| GOL | \* | \* | \* | 0.2 | 1.0 | Mediapro | Orient Hontai Capital |
| Real Madrid HD | \* | \* | \* | 0.2 | 0.4 | Real Madrid CF | Real Madrid CF |
| Pay-TV channels, audience share (%) | | | | | | | |
| Bein Liga | \* | \* | \* | 0.3 | 0.5 | BeIN Sports | Orient Hontai Capital |
| FOX | 0.3 | 0.3 | 0.5 | 0.4 | 0.5 | Fox Networks Group | Twenty-First Century Fox, Inc. |
| TNT | 0.2 | 0.3 | 0.3 | 0.3 | 0.4 | Time Warner | Time Warner |
| AXN | 0.3 | 0.3 | 0.4 | 0.3 | 0.3 | Sony Pictures | Sony Corporation |
| Canal Hollywood | 0.2 | 0.3 | 0.3 | 0.3 | 0.3 | Multicanal Iberia, S.L.U. | AMC Networks |
| Calle 13 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | NBC Universal | Comcast Corporation |
| Canal Historia | 0.1 | 0.1 | 0.1 | 0.1 | 0.2 | Multicanal Iberia, S.L.U. | AMC Networks |
| AMC | \* | 0.2 | 0.1 | 0.2 | 0.2 | Multicanal Iberia, S.L.U. | AMC Networks |
| Comedy Central | 0.2 | 0.1 | 0.2 | 0.2 | 0.2 | Viacom | Sumner Michael Redstone |
| Fox Life | \* | 0.1 | 0.1 | 0.1 | 0.2 | Fox International | Twenty-First Century Fox, Inc. |
| #0 | \* | \* | \* | 0.1 | 0.2 | Telefónica/Movistar+ | Telefónica S.A. |
| Movistar Partidazo | \* | \* | \* | 0.1 | 0.2 | Telefónica/Movistar+ | Telefónica S.A. |
| Cosmopolitan | 0.1 | 0.2 | 0.2 | 0.2 | 0.1 | Hearst Corporation | Cooperatief International Publications Holding Iph UA |
| NICK | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | Viacom | Sumner Michael Redstone |
| Canal Cocina | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | Multicanal Iberia, S.L.U. | AMC Networks |
| Discovery | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | Discovery Networks | Discovery Inc. |
| National Geographic | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | Fox Networks Group | Twenty-First Century Fox, Inc. |
| SYFY | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | NBC Universal | Comcast Corporation |
| TCM HD | \* | 0.1 | 0.1 | 0.1 | 0.1 | Time Warner | Time Warner |
| AXN White | \* | 0.1 | 0.1 | 0.1 | 0.1 | Sony Pictures | Sony Corporation |
| Movistar Estrenos | \* | \* | \* | 0.1 | 0.1 | Telefónica/Movistar+ | Telefónica S.A. |
| BeIN Sports | \* | \* | \* | 0.1 | 0.1 | BeIN Sports | Orient Hontai Capital |

\*operations in Spain not launched yet

Source: Kantar Media

*Regional Television*

Regional television channels have experienced a steady decline in audience in recent years mostly because of competition made possible by the switchover to digital broadcasting, which made room for more channels in the market. Moreover, the economic crisis hit local broadcasters hard forcing them to massively cut their budgets. The regional television chains grouped in Forta (an umbrella association of all regional television channels in Spain) had an audience share of 7.6% in 2017, a decline of 1.1 p.p. compared to 2013.

Generally, regional television broadcasters have an increasingly difficult job to justify their value to society. Regional channels, most of which are public broadcasters, need to be competitive and attract audiences with quality programming, which is extremely difficult with declining resources. As younger generations, particularly GenZ, Alpha or Gen# generations, are adopting a totally new approach to media consumption and information, it is becoming even more difficult for these channels to keep pace with this rapidly changing environment.

**TV in the regions**

**Most popular regional television stations in Spain, by 2017 audience share (%), 2013-2017**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Channel | 2013 | 2014 | 2015 | 2016 | 2017 | Operating company | Majority owner | Region |
| TV3 | 13.5 | 12.6 | 12.5 | 11.4 | 11.8 | Public service | Corporació Catalana de Medios Audiovisuales | Cataluña |
| TVG | 10.9 | 10.0 | 9.3 | 9.8 | 10.4 | Public service | CRTVG | Galicia |
| Canal Sur | 9.9 | 9.5 | 8.3 | 8.5 | 9.2 | Public service | Radio y TV Andalucía | Andalucía |
| Aragón TV | 11.5 | 11.3 | 10.4 | 9.0 | 8.3 | Public service | CARTV | Aragón |
| ETB2 | 9.6 | 9.0 | 8.0 | 7.3 | 7.8 | Public service | Euskal Irrati Telebista | Euskadi (País Vasco) |
| CMM | 4.4 | 4.6 | 4.6 | 5.1 | 6.0 | Public service | CMMedios | Castilla-La Mancha |
| Canal Extremadura | 4.5 | 5.7 | 6.6 | 5.5 | 5.8 | Public service | CEXMA | Extremadura |
| TVCAN | 7.2 | 7.3 | 5.9 | 5.1 | 5.5 | Public service | Radio Televisión Canarias | Canarias |
| TPA | 5.4 | 6.2 | 5.6 | 5.0 | 5.1 | Public service | TV Principado Asturias | Asturias |
| Telemadrid | 3.8 | 4.2 | 4.1 | 4.8 | 4.1 | Public service | Radio Televisión Madrid | Madrid |
| 8TV | 3.4 | 3.5 | 3.3 | 3.4 | 2.8 | Private | Grupo Godó | Cataluña |
| IB3 | 5.9 | 5.8 | 5.4 | 3.4 | 2.7 | Public service | EPRTVIB | Baleares |
| 7 TV (\*\*\*) | \* | \* | \* | 2.4 | 2.7 | Public service | Televisión Autonómica de Murcia S.A. | Murcia |
| ETB1 | 2.1 | 2.0 | 1.9 | 1.9 | 2.0 | Public service | Euskal Irrati Telebista | Euskadi (País Vasco) |
| 3/24 | 1.2 | 1.3 | 1.5 | 1.5 | 2.0 | Public service | Corporació Catalana de Medios Audiovisuales | Cataluña |
| CYL7 | 1.5 | 1.4 | 1.3 | 1.4 | 1.4 | Private | RTV Castilla y León | Castilla y León |
| Súper3/33 | 1.7 | 1.6 | 1.5 | 1.2 | 1.2 | Public service | Corporació Catalana de Medios Audiovisuales | Cataluña |
| TPA2 | 0.7 | 0.7 | 0.8 | 0.7 | 0.8 | Public service | TV Principado Asturias | Asturias |
| ETB4 | 0.5 | 1.1 | 1.1 | 0.9 | 0.8 | Public service | Euskal Irrati Telebista | Euskadi (País Vasco) |
| Esport3 | 1.4 | 1.2 | 1.1 | 1.0 | 0.7 | Public service | Corporació Catalana de Medios Audiovisuales | Cataluña |
| TVG2 | 0.9 | 0.8 | 0.8 | 0.8 | 0.7 | Public service | CRTVG | Galicia |
| CYL8 | 0.6 | 0.8 | 0.8 | 0.7 | 0.7 | Private | RTV Castilla y León | Castilla y León |
| ETB3 | 0.9 | 0.9 | 0.6 | 0.6 | 0.5 | Public service | Euskal Irrati Telebista | Euskadi (País Vasco) |
| 8Madrid | 0.6 | 0.8 | 0.6 | 0.6 | 0.5 | Private | 8MadridTV | Madrid |
| TV3.cat | \* | \* | 0.0 | 0.3 | 0.5 | Public service | Corporació Catalana de Medios Audiovisuales | Cataluña |
| Andalucía-TV | \* | \* | 0.3 | 0.5 | 0.4 | Public service | Radio y TV Andalucía | Andalucía |
| Canal Sur-And | 0.2 | 0.2 | 0.2 | 0.2 | 0.3 | Public service | Radio y TV Andalucía | Andalucía |
| RAC105 | 0.2 | 0.2 | 0.1 | 0.2 | 0.1 | Private | Grupo Godó-Prisa | Cataluña |
| V Televisión (\*\*) | 0.4 | 0.4 | 0.4 | 0.3 | 0.1 | Private | Corporación Voz de Galicia | Galicia |
| Galicia TV | 0.0 | 0.0 | 0.0 | 0.1 | 0.1 | Public service | CRTVG | Galicia |

\*operations in Spain not launched yet

\*\*V Televisión aired for a decade (it was launched on 9 March 2010 and folded on 1 January 2018)

\*\*\*Data for 7TV not available between 2013 and 2016 as the station decided to quit the audience measurement carried out by Kantar Media

Note: On 10 June 2018, the station À Punt Mèdia, of Corporación Valenciana de Medios de Comunicación, launched operations. Three months later, it had an audience share of 1.2% (according to the latest available data collected for the purpose of this report in October 2018).

Source: Kantar Media

*Radio*

Radio has lost a significant number of listeners in recent years. The radio listenership declined from some 11.4 million in 2013 to 11.1 million in 2017. Nevertheless, the generalist radio market has remained relatively stable in terms of audience preferences, the three main privately held radio chains (SER, COPE and Onda Cero) dominating the audience ratings nationwide. They are followed at a distance by the public network RNE.

The leading chain on the Spanish radio market with more than four million listeners a day, SER is a generalist radio broadcaster airing nationally that is owned by Prisa group. Although it has been losing audience to its closest competitor, COPE, SER remains a leading force in the Spanish radio market, with a share of nearly 33% in 2017. One of SER’s programs with a high popularity in the current affairs segment is Hora 25 (Hour 25), moderated by Ángeles Barceló, aired in the evening.

With a high increase in audiences over the course of the last five years, COPE has consolidated its second position in the radio market. The chain, **owned by whom?,** has managed to boost its audience mainly by thanks to popular journalists that it snatched from its rivals. Such was journalist Carlos Herrera who came to COPE from Onda Cero to produce COPE’s morning shows. Mr Herrera almost doubled the station's audience from 980,000 daily listeners in 2013 to 1.7 million in 2017.

Owned by Atresmedia, Onda Cero has been troubled in recent years by a decline in audience. In 2017, it had 1.8 million daily listeners, a decline of over half a million listeners compared to 2013.

The other two players on the Spanish nationwide radio market are RNE, a public radio channel belonging to RTVE, which has seen a constant growth in audience, of more than 500,000 listeners since 2013; and esRadio, the youngest radio chain that started operations as a generalist chain with nationwide coverage in September 2009. esRadio is run jointly by Libertad Digital and Unidad Editorial, two media groups.

Thematic radio channels have also recorded a decline in audience during the past five years, from some 14.7 million daily listeners in 2013 to 14.4 million in 2017. The most popular thematic radio stations are in the music and sports segments. News-focused radio enjoys much smaller audiences. Some one million daily listeners tuned in to news stations in 2017. In contrast, music radio attracted some 13.5 million daily listeners that year.

**Tuning in**

**Most popular nationwide radio stations in Spain, by 2017 audience (number of listeners, ‘000), 2013-2017**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Radio chain | 2013 | 2014 | 2015 | 2016 | 2017 | Operating company | Majority owner |
| SER | 4,491 | 4,447 | 4,419 | 4,269 | 4,078 | Private | Grupo Prisa |
| COPE | 1,859 | 1,891 | 2,029 | 2,588 | 2,642 | Private | Grupo COPE |
| Onda Cero | 2,354 | 2,369 | 2,137 | 1,767 | 1,786 | Private | Atresmedia |
| RNE | 1,280 | 1,249 | 1,273 | 1,306 | 1,351 | Public service | RTVE |
| EsRadio | 247 | 312 | 337 | 361 | 345 | Private | Libertad Digital |

Source: EGM

*Regional Radio*

**Of all those local radios presented in the main report, choose some of the most prominent in terms of news and present them here in a very very short paragraph, half a page at max.**

**Local tunes**

**Most popular regional radio stations in Spain, by 2017 audience (number of listeners, ‘000), 2013-2017**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | 2013 | 2014 | 2015 | 2016 | 2017 | Operating company | Majority owner |
| Rac1 | 644 | 700 | 745 | 724 | n/a | Private | Grupo Godó |
| Catalunya Radio | 570 | 571 | 595 | 546 | 632 | Public service | Corporación Catalana de Medios |
| Canal Fiesta | 334 | 370 | 411 | 375 | 379 | Public service | Radio y TV Andalucía |
| Flaix bac | 267 | 262 | 286 | 342 | 341 | Private | Grupo Flaix |
| Canal Sur Radio | 355 | 348 | 327 | 302 | 266 | Public service | Radio y TV Andalucía |
| Radio Euskadi | 183 | 172 | 158 | 176 | 149 | Public service | Euskal Irrati Telebista |
| Radio Galega | 176 | 144 | 138 | 127 | 138 | Public service | CRTVG |
| Euskadi Irratia | 70 | 85 | 90 | 82 | 107 | Public service | Euskal Irrati Telebista |
| Flaix | 355 | 307 | 296 | 263 | 251 | Private | Grupo Flaix |
| Rac105 | 255 | 234 | 218 | 219 | 232 | Private | Grupo Godó |
| Radiio Tele Taxi | 139 | 128 | 152 | 167 | 139 | Private | Justo Molinero |
| Catalunya Informació | 143 | 138 | 119 | 114 | 118 | Public service | Corporación Catalana de Medios |
| Euskadi Gaztea | 104 | 109 | 81 | 98 | 97 | Public service | Euskal Irrati Telebista |

n/a: not available  
Source: EGM

*Print*

The main newspaper publishers in Spain are local media entrepreneurs that have been buying or setting up media outlets in the last 40 year, from the approval in 1978 of the Spanish Constitution, valid to this day, which allowed the sale or closure of media outlets that used to be controlled by the regime of the Spanish dictator Francisco Franco. The newly formed media groups include Prensa Ibérica, Vocento, Zeta, Prisa, UNEDISA and, later, Joly in Andalucía, Promecal in Castilla León and Castilla-La Mancha, Henneo in Aragón and Noticias in Navarra and the Basque country.

Family ownership is more present in newspaper publishing companies than in magazines or audiovisual media, primarily because they focused on the profession they knew best. But as media groups continue to grow and thus need more capital, families that own newspaper publishers tend to lose control in their companies, especially those publicly listed. That was the case of the Polanco family in the group Prisa and the Ybarra, Urrutia, Luca de Tena, Bergareche and Careaga families in Vocento. Members of these families today sit on supervisory boards with representatives of investment funds, telecommunication companies and banks.

Nevertheless, several local families still maintain total or majority control in some publishers such as the Godós in La Vanguardia, the Asensios in Zeta, the Moll family in Prensa Ibérica, Serra in Hora Nova, Yarza in Henneo, Vázquez Pozo in Promecal, Joly, Santiago Rey in La Voz de Galicia, Outeiriño in La Región de Ourense, Cora in El Progreso or Rodríguez in El Día de Tenerife.

Vocento is the largest Spanish press group by assets. With a conservative profile, it was formed in 2001 through the merger of a clutch of regional and local newspapers of Basque origin (El Correo and Diario Vasco) and Prensa Española (ABC and Blanco y Negro). Vocento now owns 14 newspapers and a total of 100 news media outlets, including radio stations (associated with the COPE), television stations (Net TV, Punto TV and producers) and internet publications. Despite its diversification efforts, the majority of Vocento’s business is concentrated in the regional print press. The company has been listed on the stock exchange since 2006, with most of its capital divided among several families (the Ybarras with 16.6%), Urrutia (10.1%), Luca de Tena (10.1%), Bergareche (7.9%), Rereaga Salazar (5.4%), Aguirre (5.0%), Castellanos (4.4%) and various other entrepreneurs or investment funds.

Promotora de Información (Prisa) is the leading media group in Spain, with €1.17bn in revenue in 2017. The print press only accounts for a fifth of its business. Prisa owns the centre-left daily newspaper El País, the sports publication As, and the business newspaper Cinco Días. Although Prisa was created in 1984, its history harks back to the founding of the Editorial Santillana in 1958 by Jesús de Polanco, who participated in 1976 with José Oterga Spottorno, Juan Luis Cebrián and other partners in the foundation of El País. Mr de Polanco, who passed away in 2007, took control of Grupo Prisa and expanded beyond the Spanish borders to Latin America as well as some European markets (bought the French daily Le Monde and Media Capital of Portugal), It also expanded into radio (SER radio chain) and television (Canal Plus and Sogecable).

In 2007, Prisa launched an Initial Public Offering (IPO) for the full stake in Sogecable (the pay-TV company co-owned by French Canal+ and Telefónica, which in 2003 had merged with the platform Via Digital). The decision sent Prisa into debt, which, coupled with the global economic crisis, led to an 80% depreciation of its shares. For the next ten years Prisa thus had to sell assets and seek new partners. The group’s capital is controlled by Amber Capital UK (19.3%); Rucandio (Polanco family) with 17.5%; Telefónica (13.1%); International Media Group (Qatar) with 8.2%; GHO Networks (Mexican capital) with 8.0%; HSBC bank with 7.5%; Banco Santander with 4.2%; La Caixa with 3.8%; and Berggruen with 1.22%. In 2018, the journalist Juan Luis Cebrián ceded the presidency of the group to Manuel Polanco and that of El País to Manuel Mirat.

Unidad Editorial (UNEDISA), the third largest press group in Spain by revenue, owns El Mundo, a centre-right newspaper, as well as the sports publication Marca, the business newspaper Expansión, several magazines and Veo TV. The company is majority owned (96%) by Italy’s RCS, a group controlled by the advertising entrepreneur Urbano Cairo. RCS bought UNEDISA in 2007 when the Spanish group acquired the Recoletos group, publisher of sports and economic publications, and other specialised magazines, for a total of €1.1bn. The debt that followed the acquisition, combined with the effects of the economic crisis, also forced UNEDISA to embark on a series of restructuring processes.

Prensa Ibérica, another important press group in Spain, was founded in 1978 when Francisco Javier Moll, a banker, acquired the publisher La Provincia and the newspaper Diario de Las Palmas (the only evening newspaper that had survived in Spain), and merged them. Mr Moll purchased in 1984 three major local newspapers (in Asturias and Valencia), formerly owned by the Franco regime, that were auctioned off by the government of Felipe González. Moll’s group continued its expansion by buying newspapers (among them Faro de Vigo, one of the oldest of the Spanish press, founded in 1853) or founding new ones. His group now runs 16 publications, of which 14 are focused on general information and two on sports. Of all, La Opinión is the most read.

Zeta group, founded in 1976 by Antonio Asensio, who died in 2001, and currently controlled by his family, controls six general information journals, two sports publications, 13 magazines, and a raft of digital media. Zeta, which based much of its expansion on the success of the weekly magazine Interviú, has also expanded into audiovisual businesses and football teams. Expansion, however, led to debts, which in recent years forced Zeta to undergo continued restructuring.

Among regional markets, Catalonia has a strong print media sector, which is dominated by a group owned by the Godó family, publisher of the newspapers La Vanguardia (launched in 1881) and Mundo Deportivo (started in 1906), and half a dozen magazines. The group also owns regional radio and television outlets. In Andalusia, the main newspapers are published by Joly group (nine newspapers in total). It was founded by the family of Diario de Cádiz in 1867. In Spain's central regions of Castillas, the press market is dominated by Promecal group (10 newspapers, most of them with the title La Tribuna). The group was founded in 2000 and is owned by the Méndez Pozo family who comes from the construction business. La Voz de Galicia, with 99% of its capital controlled by Santiago Rey Fernandez Latorre, grandson of the newspaper's founder who launched the paper in 1882, leads in Galicia’s media market. Vocento is leading on the press market in the Basque Country and Cantabria. The company has string competition in theAsturias and Valencia regions from Prensa Ibérica. In the Balearic Islands the Serra family owns the leading publisher. Prensa Ibérica also operates there.

International groups and franchises dominate the specialized magazine publishing industry in Spain. A few domestic families like those of Sánchez Junco de Hola, Rodríguez Amar and Nadal also run magazines, albeit with much lower circulations. The main international groups that operate on this market, mostly German and American, include Hearst, Newhouse, Bertelsmann, Axel Springer and Holtzbrinck.

**Daily readings**

**Most popular daily newspapers in Spain, nationwide, by 2017 sold circulation (number of sold copies), 2013-2017**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | 2013 | 2014 | 2015 | 2016 | 2017 | Operating company | Majority owner |
| El País | 292,227 | 259,775 | 221,390 | 194,005 | 175,041 | Prisa | Amber Capital, Rucandio\*, Telefónica |
| Marca | 181,416 | 171,854 | 149,459 | 138,983 | 126,213 | Unidad Editorial | RCS- Urbano Cairo, Italia |
| AS | 158,164 | 149,004 | 133,503 | 125,956 | 112,004 | Prisa | Amber Capital, Rucandio\*, Telefónica |
| La Vanguardia | 152,320 | 140,176 | 129,073 | 114,960 | 105,813 | Godó | Godó family |
| El Mundo | 172,427 | 149,684 | 126,369 | 108,386 | 97,162 | Unidad Editorial | RCS- Urbano Cairo, Italia |
| ABC | 140,049 | 128,660 | 107,801 | 91,159 | 79,892 | Vocento | Families Ybarra, Urrutia, Luca de Tena, Bergarech e, Careaga, Aguirre, Castellano s |
| La Razón | 85,135 | 81,449 | 80,108 | 77,129 | 70,019 | Planeta | Familia Lara |

\*Polcanco family  
Source: Circulation Audit Office (*Oficina de Justificación de la Difusión*, OJD), 2013-2017

**Key publishers**

**Main print media publishers in Spain by 2017 number of sold copies, 2013-2017**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Publisher | 2013 | 2014 | 2015 | 2016 | 2017 | Majority owner |
| Vocento | 462,208 | 429,161 | 391,390 | 352,501 | 318,859 | Families: Ybarra, Urrutia, Luca de Tena, Bergareche, Careaga, Aguirre & Castellanos |
| Prisa | 450,391 | 408,779 | 354,893 | 319,961 | 287,045 | Amber Capital, Rucandio, Telefónica |
| Unidad Editorial | 384,307 | 350,537 | 302,200 | 271,361 | 246,762 | RCS-Urbano Cairo, Italia |
| Editorial Prensa Ibérica | 196,047 | 184,451 | 175,940 | 165,697 | 153,614 | Family de Francisco Javier Moll |
| Godó | 152,320 | 140,176 | 129,073 | 114,960 | 105,813 | Family Godó |
| Zeta | 118,160 | 112,204 | 106,340 | 98,423 | 88,326 | Family Asensio |
| Planeta | 85,135 | 81,449 | 80,108 | 77,129 | 70,019 | Family Lara |
| Voz | 80,077 | 75,104 | 72,377 | 68,683 | 65,390 | Santiago Rey Fernández Latorre |
| Joly | 59,575 | 55,083 | 51,557 | 48,518 | 45,043 | Family Joly |
| Henneo | 44,176 | 41,770 | 38,647 | 35,447 | 32,410 | Family Yarza e Ibercaja |
| Serra | 33,354 | 31,149 | 29,952 | 28,166 | 26,397 | Family Serra |
| Noticias | 31,732 | 29,682 | 28,457 | 26,960 | 25,256 | Editorial Iparaguirre y Zeroa |
| Promecal | 27,826 | 27,377 | 25,529 | 24,023 | 22,005 | Family Vázquez Pozo |
| Hermes | 24,201 | 24,046 | 23,306 | 21,939 | 21,693 | Joaquim Vidal |
| El Progreso | 19,154 | 18,262 | 17,619 | 16,902 | 16,156 | Family Cora |
| La Región | 12,447 | 12,143 | 12,059 | 12,122 | 12,056 | Óscar Outeiriño |

Source: OJD, 2013-2017

**Weeklies: an entertainment business**

**Most read magazines (weeklies and monthlies) in Spain, by 2017 sold circulation (number of sold copies), 2013-2017**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Magazine | 2013 | 2014 | 2015 | 2016 | 2017 | Periodicity | Genre | Operating company | Majority owner |
| Pronto | 876925 | 85054 7 | 815575 | 781425 | 732451 | Weekly | Women | Heres | Publicacio nes Heres S.L. |
| Hola | 399007 | 38621 9 | 379084 | 371876 | 341024 | Weekly | Women | Hola | Hola S.L. |
| Saber Vivir | 275039 | 262,298 | 200006 | 208821 | 192398 | Monthly | Health | RBA Revistas | Hamlet S.A. |
| Lecturas | 186172 | 19490 9 | 216161 | 209514 | 180783 | Weekly | Women | RBA Revistas | Hamlet S.A. |
| Diez Minutos | 237280 | 21306 6 | 194070 | 179648 | 158037 | Weekly | Women | Hearst | Cooperatief International Publications Holding |
| Semana | 149040 | 14053 2 | 142436 | 152392 | 135160 | Weekly | Women | RBA Revistas | Hamlet S.A. |
| Telva | 156936 | 14201 3 | 141925 | 127498 | 118129 | Monthly | Women | Unidad Editorial | RCS- Urbano Cairo, Italia |
| Woman Madame Figaro | 148991 | 13749 5 | 106941 | 104780 | 107860 | Monthly | Women | Zeta | Familia Asensio |
| Qué me dices | 165401 | 14683 9 | 137510 | 123109 | 106657 | Weekly | Women | Hearst | Hamlet S.A. |
| National Geographic | 136560 | 12831 0 | 120902 | 111689 | 100941 | Monthly | General knowled ge | RBA Revistas | Hamlet S.A. |
| Glamour | 157825 | 14600 3 | 128824 | 112175 | 100692 | Monthly | Women | Conde Nast | Newhous e Familiy Holdings |
| Muy Interesante | 138744 | 13364 5 | 133351 | 122540 | 94131 | Monthly | General knowled ge | Zinet | Hispano Alemana de Finanzas e Inversion es en Capital SL |
| Marie Claire | 58691 | 73699 | 76086 | 102267 | 90275 | Monthly | Women | Zinet | Hispano Alemana de Finanzas e Inversion es en Capital SL |
| Hola Fashion | 147662 | 14943 0 | 137079 | 110621 | 90083 | Monthly | Women | Hola | Hola S.L. |
| Elle | 146831 | 13480 2 | 116298 | 105760 | 87190 | Monthly | Women | Hearst | Hamlet S.A. |
| Clara | 116628 | 110598 | 97427 | 91904 | 81324 | Monthly | Women | RBA Revistas | Hamlet S.A. |
| El Mueble | 99851 | 91667 | 84396 | 81831 | 74139 | Monthly | Decorati on | RBA Revistas | Hamlet S.A. |
| Lecturas Cocina Fácil | 112348 | 96939 | 86159 | 75080 | 68439 | Bimonth ly | Gastron omy and cuisine | RBA Revistas | Hamlet S.A. |
| Mía | 92830 | 99012 | 100806 | 86292 | 66198 | Weekly | Women | Zinet | Hispano Alemana de Finanzas e Inversion es en Capital SL |
| Cosas de Casa | 111950 | 98512 | 90876 | 74852 | 65305 | Monthly | Decorati on | RBA Revistas | Hamlet S.A. |

Source: OJD, 2013-2017

*Online News*

The digital portals of the newspapers El País, El Mundo and 20 minutos (a free-of- charge newspaper) are getting the highest readership in Spain, according to data from the Digital News Report 2017 from the Reuters Institute for the Study of Journalism (RISJ), a research outfit in Oxford. On the other hand, several newly established digital platforms such as El Confidencial, Eldiario.es and [público.es](http://xn--pblico-pya.es) have been successful among audiences.

In the past decade, in fact, Spain has seen the rise of several new players on the online news market, many of them launched by managers who used to work in print media, business journalists or journalists who worked in traditional newsrooms. Three of them, Elespanol.com, Elnacional.cat and Infolibre.com, were initially financed through crowdfunding. Ideology-wise, these media are polarised between the left and the right.

The leading online platform Elconfidencial.com, which was launched in 2001 by Titania Editorial, a company established by a group of journalists who used to work in print media or as communications consultants. They included Jesús Cacho, Antonio Casado and José Antonio Sánchez García. Later quarrels between the founding partners prompted Mr Cacho to leave in the 2010s to launch another portal, Vozpopuli.com. In the meantime, Mr Sánchez García became the majority owner in Titania, in control of43% of the shares. Former prominent managers from the telephony carrier Telefónica de España, such as Juan Perea, also bought shares in Titania. El Confidencial is a digital portal politically positioned in the liberal, centrist segment, publishing general news including business and finance and society. They cater to a professional public, in the middle class segment, with high purchasing power, which is much sought by advertisers. El Confidencial in 2016 made a strategic alliance to sell ads with the company Weblog S.L., which runs Xataka, a portal launched in 2005 by Julio Alonso. Xataka aggregates more than 30 portals specialized in various topics and have a big online traffic. The alliance led to the creation of Medios Natives Digitales, an entity that sells ads online.

Another new player online, El Español was launched by journalist Pedro J. Ramírez who in 2014 was sacked from his position of director at El Mundo, the main newspaper owned by Unidad Editorial. Following a crowdfunding campaign in 2015, Mr Ramírez registered the company Nohacefaltapapel as publisher of the new title. The name of the portal was inspired by a similar periodical founded in London in 1810 by José María Blanco White, a liberal journalist. El Español is known as a publication that both defends the national Spanish identity and promotes radical liberalism.

Eldiario.es is another newly launched online portal. It was set up by the young journalist Ignacio Escolar, son of another journalist, Arsenio Escolar. Mr Escolar Jr launched the new online publication with the help of other journalists from the newspaper Público where he used to work as an editor. Roughly 70% of the capital in Eldiario.es is controlled by the journalists working for the portal. Eldiario.es targets a young, leftist and educated public. The left is also supported by Público.es, a website of the eponymous newspaper, which has a new newsroom in Madrid although its publisher is operates out of Barcelona. The portal is supported by Toni Cases, Jaume Roures and Tatxo Benet **[who are these people? a few sentences about them needed]**. It also receives video content from the television program La Tuerka, which is run by the leader of the Podemos political party, Pablo Iglesias.

Following the same ideological line is Infolibre, which was launched in 2013. Led by Jesús Maraña, another ex-director of the newspaper Público, Infolibre has been initially funded by its own journalists, the company Mediapart of France as well as through crowdfunding. A group of writers, actors, singers and leftist intellectuals also supported the launch of Infolibre.

OkDiario.com, a liberal conservative website, was established in 2015 by the journalist Eduardo Inda who left his deputy director job at El Mundo. Also conservative is Periodista Digital, established in 2004 by the journalist Alfonso Rojo, who also left histjob at El Mundo.

The main online player in Catalonia is Vilaweb, the oldest digital portal in the region. It was launched by the writer and journalist Vicente Partal in 1995, operating in its early days as Infopista. A promoter of Catalonia’s independence and republican views, the portal launched an English version of the site in 2014. Another portal launched in Catalonia was Elnacional.cat. It was established by José Antich, previously director of La Vanguardia for 14 years. Mr Antich financed the new portal with money raised through crowdfunding. The site is available in both Catalan and Spanish and has a nationalist and independence-focused agenda.

**News, virtually**

**Most popular internet portals in Spain, by 2017 number of unique users**

|  |  |  |  |
| --- | --- | --- | --- |
| Portal | Total number of unique visitors (in ‘000), 2017 | Operating Company | Majority Owner |
| El País sites | 19284 | Prisa | Amber Capital, Rucandio, Telefónica |
| La Vanguardia | 17977 | Grupo Godó | Family Godó |
| El Mundo sites | 17956 | Unidad Editorial | RCS-Urbano Cairo, Italia |
| ABC sites | 16442 | Vocento | Families: Ybarra, Urrutia, Luca de Tena, Bergareche, Careaga, Aguirre & Castellanos |
| 20Minutos sites | 14121 | Henneo | Families Yarza e Ibercaja |
| Marca sites | 13711 | Unidad Editorial | RCS-Urbano Cairo, Italia |
| El Confidencial.com | 12246 | Titania Editorial | José Antonio Sánchez García, Juan Perea Saenz de Buruaga, Antonio Rodríguez Aporta |
| As.com sites | 10955 | Prisa | Amber Capital, Rucandio, Telefónica |
| El Periódico | 10567 | Zeta Gestión de Medios (Grupo Zeta) | Family Asensio |
| Hola.com sites (Revista Hola) | 10486 | Hola! | Family Sánchez |
| Telecinco | 9923 | Mediaset España | Mediaset Italia |
| Mundodeportivo.com sites | 9100 | Grupo Godó | Family Godó |
| Okdiario.com | 8857 | Dos Mil Palabras S.L. | Grupo Empresas Alonso Mari SA. |
| Eldiario.es sites | 8645 | Diario de Prensa Digital S.L. | - |
| Eleconomista.es | 8230 |  | Ecoprensa S.A. (Michael Georg Schumacher) |
| HuffPost News | 7452 | Oath | Verizon |
| RTVE | 7387 | RTVE | Public service |
| HuffPost Spain | 6935 | Oath | Prisa |
| Elespañol.sites | 6931 | El León de El Español de Publicaciones S.A. | Pedro J. Ramírez |
| Expansión sites | 6846 | Unidad Editorial | RCS MediaGroup. Unidad Medios Digitales |
| La Razón | 6658 | Grupo Planeta | Family Lara |
| Antena 3.com | 6622 | Atresmedia | Planeta & Bertelsmann |
| Xataka sites | 6614 | CM Nativos | Weblog S.L. |
| Publico.es sites | 6144 | Display Connectors SL | Jaume Roures Llop |
| Cadena Ser sites | 6024 | Prisa | Amber Capital, Rucandio, Telefónica |
| Periodista Digital sites | 5757 | Periodista Digital S.L. | Alfonso López Rojo, David Rojo López |
| Sport.es sites | 5726 | Zeta Gestión de Medios (Grupo Zeta) | Family Asensio |
| La voz de Galicia | 5683 | Voz | Santiago Rey Fernández Latorre |

Source: comScore (November 2017)

**Most popular internet portals in Spain, by 2017 number of average unique visitors/day, 2016-2017**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Portal | 2016 | 2017 | Operating Company | Majority Owner |
| ElEspañol.com | 447053 | 930113 | El León de el Español Publicaciones, S.A. | Pedro J. Ramírez |
| Público.es | 554534 | 678981 | Display Connectors, S.L. | Jaume Roures Llop |
| ElDiario.es | 457165 | 549971 | Diario de Prensa Digital, S.L. | - |
| EuropaPress | 332188 | 314486 | Europa Press Comunicación, S.A. | Heredia 3G S.A. |
| La Razón | 239937 | 386143 | Audiovisual Española 2000, S.A. | Planeta (Family Lara) |
| ElNacional.cat | 68111 | 351488 | Grup Les Notícies de Catalunya, S.L.U. | José Antich Valero |
| Ara.cat | 145854 | 237184 | Edició de Premsa Periòdica Ara, S.L. | Fernando Rodes Vila, Fundació Carulla |
| NacióDigital | 182782 | 251732 | SCG Aquitania S.L. | - |
| Vilaweb | 89515 | 251774 | Partal, Maresma & Associats, S.L. | - |
| CatalunyaDiari.cat | - | 234406 | Edicions Digitals del Camp, S.L. | - |
| ElMon.cat | 111308 | 132940 | Editora Singular Digital 2GR S.L. | Gragal Projects S.L. |
| Rac1.cat | 32250 | 112042 | Radiocat XXI, S.L. | Grupo Godó (Family Godó) |
| Vanity Fair | 30689 | 67546 | CondéNet Ibérica, S.L. | Newhouse Family Holdings LP |
| DiarideTarragona.com | 28961 | 66117 | Promotora Mediterránea de Informaciones y Comunicaciones, S.A. | Fomento de Inversiones y Participaciones Mediterraneas SA |
| El Punt Avui.cat | 49288 | 77758 | Hermes Comunicacions, S.A. | Cosal 2012 Sociedad Limitada |
| ÚltimaHora.es | - | 77867 | Hora Nova, S.A. | Pedro Serra Bauza, Paula María Serra Magraner |
| Infolibre.es | 76407 | 78645 | Ediciones Prensa Libre, S.L. | - |
| Canarias7.es | 61995 | 77144 | Informaciones Canarias, S.A. | Comunicación y Prensa S.A. |
| LaOpiniónDeMálaga.es | 45888 | 55125 | La Opinión de Málaga Media, S.L.U. | Prensa Ibérica Media S.L. (Francisco Javier Moll de Miguel y María Aranzazu Sarasola Ormazabal) |
| CLM24.es | 13387 | 54007 | Diverxa Multimedia, S.L. | Rubén Plaza Torralba |

Data of 2016 and 2017 for the month of November, with the following exceptions: Rac1.cat (December 2016, first counted, November 2017) and CatalunyaDiari.cat and ÚltimaHora.es (did not collect data before 2017).

Source: OJD Interactiva (2016-2017)

***Funding Trends***

*Broadcasting*

In 2011, the broadcast operator Mediaset dominated the television advertising market, with a share of 43%. It was followed by Antena 3 with more than 32%, La Sexta with 10.5%, Vocento with 2.5%, UNEDISA with 1.6%. The rest of the television ad spend, some 10%, was shared by regional broadcasters. Thus, the two largest television groups, Mediaset and Atresmedia (with the integration of La Sexta), which back then had an audience share of 51.1% combined, commanded nearly 86% the total television ad spend in Spain.

In 2011, television and radio advertising spending in Spain totalled €6.5bn. Some €2bn of that went to free-to-air television, another €1.7bn to pay-TV and roughly €2bn funded the country’s public service broadcasting. Approximately €391.5m was spent on radio ads.

But between 2011 and 2016, Spain’s television and radio ad market declined to €5.9bn, according to data from the CNMC. Free-to-air television has lost some 7% of its ad revenues, generating roughly €1.9bn in 2016. In contrast, pay-TV boosted its ad revenues by 10% during the period, ending the year 2016 with some €1.8bn in ad income. Between 2011 and 2016, the ad revenue in public service media declined by some 14% to €1.7bn and radio lost some 4% of its 2011 revenue.

The concentration of the advertising market intensified in 2016 with the duopoly Mediaset-Atresmedia pulling in some 89% of the broadcast ad spend with a combined audience share of 57.3%.

Overall, the revenue of the public and commercial television declined from €4.4bn in 2011 to €4.1bn in 2017. However, the two largest private television groups (Mediaset y Atresmedia) netted €206m and €339m during the period, respectively, in spite of the crisis that plagued the Spanish ad market. The growth of the two major television chains was the result of several factors including addition of new channels (Cuatro and La Sexta) that created new opportunities for more ad revenues; the chaotic digital licensing that did not encourage new competitors to enter the market; newly introduced legal provisions that forced the public broadcaster RTVE to stop carrying ads; and a series of policies that allowed the increase in the media ownership concentration implemented by the successive governments of José Luis Rodríguez Zapatero and Mariano Rajoy Brey.

Back in 1999, Spain was a digital television pioneer in Europe, but it then failed to adopt a sustainable business model for the new digital television market. In 1999, the government of José María Aznar awarded for the first time digital licenses. They went to the established broadcasters, to two new media groups (Vocento and UNEDISA) and to a commercial platform, Quiero TV, which three years later went bust.

In 2005, the new socialist government of Rodríguez Zapatero granted broadcast licences to Gestora de Inversiones Audiovisuales for the channel la Sexta and for Cuatro TV, the relaunched Canal Plus of Prisa. At the same time, the government allowed regional authorities to award broadcast licences for at least 36 nationwide broadcasters, more than 200 regional stations and over 1,000 local ones. Opening up the market to so many players was economically not sustainable. In the end, many of these licences could not be awarded as there was not sufficient demand. The Zapatero government also licensed in 2009 two new private channels (Gol TV y AXN), which folded after a short period of time. As of 2010 (the year when the analogue signal was switched off in Spain) the government began to fix problems created by botched policies by restructuring the oversaturated digital terrestrial broadcast market. It shut down nine channels (La Sexta 3, Xplora, Nitro, La Siete, Nueve, Intereconomía, MTV, Marca TV and AXN), based on a decision of the Supreme Court.

Another major disruption is expected in the Spanish broadcasts market in 2020 when many broadcasters will have to move out of the 700 Mhz band to make room for the 5G technology. Such changes in the digital terrestrial broadcasting have serious consequences in Spain where, as in some other European countries such as Italy, Greece, U.K. or France, terrestrial transmission is the main system of broadcasting free-to-air television that ensures universal access to broadcast services, an essential public service. In parallel, the pay-TV market has increased significantly in Spain from 4.5 million subscribers in 2011 to 6.1 million in 2016. The growth peaked in 2015 when the economy improved markedly and the offering by telecommunications operators of service packages including telephony, mobile, data and audiovisual services exploded, attracting an increasing number of consumers.

The companies that have faced losses in the Spanish media are the public broadcasters, two press publishers (Vocento and Unidad Editorial), and two digital television operators (Net TV y Veo TV). Net TV SA, which received in the year 2000 a total of nine digital licences, is controlled 55% by Pantalla Digital of the leading group on the print media market, linked with the families that own the main regional daily newspapers and ABC of Madrid, Viacon (25%) and The Walt Disney Company (20%). Veo TV SA, which also received digital licences in 2000, is fully owned by Unidad Editorial (UNEDISA), publisher of the daily El Mundo de Madrid, which in 2007 took over the specialised press publisher Recoletos. This company later was taken over by Rizzoli-Corriere della Sera (RCS), which as of 2016 has been controlled by the advertising magnate Urbano Cairo. Veo TV's channels are now sublet to Discovery Networks (DMax) and Mediapro (Gol).

**In the broadcast business**

**Key financial data for the largest television groups, €m, 2011-2017**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| TV Group | Majority sharehol der | Sales revenues (€m) | | | | | | | Net profit (€m) | | | | | | |
|  |  | 2011 | 201 2 | 201 3 | 201 4 | 201 5 | 2016 | 2017 | 2011 | 201 2 | 201 3 | 201 4 | 201 5 | 201 6 | 2017 |
| Medias et Españ a | Mediaset Italia | 1009 | 886 | 826 | 932 | 971 | 991 | 996 | 112 | 49 | 4 | 55 | 165 | 170 | 197 |
| Atresm edia | Planeta & Bertelsm ann | 805 | 741 | 829 | 883 | 970 | 1021 | 1052 | 93 | 31 | 46 | 46 | 99 | 129 | 142 |
| RTVE\* | Public | 1111 | 965 | 941 | 940 | 948 | 973 | 975 | -29 | -112 | -113 | -134 | -37 | 23 | 0.8 |
| Forta\* | Public | 1421 | 1181 | 1045 | 1020 | 1008 | 1028 | 1072 | - | - | - | - | - | - | - |
| Net TV | Vocento & Viacom | 43 | 44 | 45 | 28 | 25 | 24 | 24 | 6 | 7 | 4 | 2 | 4 | 4 | 5 |
| Veo TV | Unedisa G. Cairo Italia | 35 | 23 | 24 | 15 | 11 | 19 | - | -7 | -12 | 11 | 5 | 2 | -6 | - |
| 13 TV | Confere ncia Episcop al | 14 | 8 | 8 | 11 | 12 | 12 | 9 | -13 | -10 | -12 | -12 | -13 | -10 | -10 |

\*The groups RTVE and Forta are public broadcasters. Forta consists of the regional broadcasting companies in the regions Andalusia, Catalonia, Madrid, Valencia, Galicia, País Vasco, Canarias, Castilla La Mancha, Murcia, Aragón, Asturias y Baleares.

Source: SABI database and reports of the audiovisual regulator CNMC

**Key financial data for the largest radio operators, €m, 2011-2017**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Radio group | Majority sharehol der | Sales revenues (€m) | | | | | | | Net profit (€m) | | | | | | |
| 2011 | 201 2 | 201 3 | 201 4 | 201 5 | 2016 | 2017 | 2011 | 201 2 | 201 3 | 201 4 | 201 5 | 201 6 | 2017 |
| PRISA Radio (Caden a Ser) | Amber Capital, Rucandi o& Telefónic a | 376 | 342 | 323 | 305 | 314 | 301 | 280 | 11 | 51 | -13 | 6 | 23 | 17 | 14 |
| Unipre x (Onda Cero) | Planeta & Bertelsm ann | 89 | 82 | 80 | 81 | 90 | 82 | 83 | 2 | -13 | 8 | 8 | 12 | 11 | 10 |
| COPE | Confere ncia Episcop al | 93 | 88 | 81 | 86 | 95 | 108 | 119 | -4 | -2 | -1 | -5 | -2 | 4 | 6 |

Source: SABI database and reports of the audiovisual regulator CNMC

*Print Media*

The decline in advertising spending, both commercial and institutional, and in newspaper circulation, has affected the financial performance of the press publishers in Spain. The 20 largest ones own some 80% of all the daily newspapers registered with the local circulation audit bureau, OJD. Only five of these groups had revenues from sales of daily newspapers and magazines that topped €5m in 2017. Most of these publishers also own radio and television channels. Two of them, Vocento and Prisa, are listed on the stock exchange. The turnover in the magazine publishing segment is smaller, below €100m.

The overall revenues in the press publishing market tumbled between 2011 and 2017, a decline of 36%.[[2]](#footnote-2) The 22 largest publishers in Spain, whose portfolios cover more than 70 of the 90 dailies audited by the OJD, generated total revenues of €2.57bn combined in 2011. Five years later, they declined to €1.84bn in 2016, and again to €1.4bn in 2017. The 20 biggest magazine publishers in the country had combined revenues of some €400m and an aggregate loss of €5m in 2017.

A total of 107 dailies (some of them not audited by OJD) were published in Spain in 2017. They had a combined circulation of 2.7 million copies. That was a decline from110 titles and an aggregate circulation of 1.8 million copies in 2013. The readership of print media fell from 12.27 million in 2013 to 9.6 million in 2017. In 2013, 1.1 million people in Spain read free-of-charge dailies. That number more than halved in 2017. On the other hand, the number of unique visitors on the digital platforms managed by these publishers increased from 10.1 million in 2013 to 10.7 million in 2017.

All these shifts in consumption patterns and market have serious consequences for the business model for paid print media, which has traditionally been based on a combination of sales of copies and ad revenues (with other types of income, mostly subsidies from various public administrations, complementing their budgets). In 2011, the share of revenue pulled in by print media from sales of copies was 52%. In 2016, it was 46%. The share of revenue from advertising increased during 2011 and 2016 from 40% to 46%. Revenues from digital advertising, in particular, surged during the period: they accounted for 15% of the overall ad income in 2012, and increased to 28% in 2016. The rest came from traditional advertising in print editions.

But as ad spending in the print media collapsed in then past five years or so, publishers had to face even more financial hurdles. The ad spend in the daily print media segment declined by 70% during 2011-2017 (from €967m to €567m), according to data from Infoadex. Ad magazine spend (including weekend supplements of daily newspapers) saw a fall of 65% between 2011 and 2017 (from €448m to €271m).

State advertising (which in Spain is known as institutional advertising), usually from Spain’s central administration, was contracted to television (27% of the total), radio (22%), dailies (18%) and internet media (17%), according to 2016 figures. Regional governments, particularly those in Catalonia, the Basque country and a few other regions, spend hefty resources on advertising in the media, but they do not publish these data. *(See more in Government Funding in this report)*

Sales of daily newspaper copies in Spain generated some €608m in 2017, a decline of 25% compared to the year 2013, according to data from WAN-IFRA. Nearly 63% of that came from direct sales and 20.5% from subscriptions. On top of that, the daily print media had some €838.4m in ad sales, according to WAN-IFRA.

Generally, during the past decade, nationwide newspapers experienced bigger declines in revenue than local and regional dailies. The two largest print media publishers focused on nationwide publications, Prisa and Unidad Editorial, saw declines of 77% and 66% in their income, respectively, between 2011 and 2017. In contrast, Vocento, which prints 14 local and regional dailies saw its revenue down by 22% during the same period, La Voz de Galicia by 23%, Godó by 43% and Prensa Ibérica by 42%.

The profitability of print media companies has also declined significantly since 2011. Their combined profits tumbled from €130.9m in 2011 to €42.6m in 2017. Again, the local and regional publishers seemed to be more resilient to the crisis, reporting lower declines in revenue( and some of them even finishing in the black).

The decline in sales of copies and ad revenue in the Spanish print media is likely to continue in the coming years. PricewaterhouseCoopers (PwC), a consultancy, expects an annual average drop in their income of 5%. In contrast, digital advertising is forecast to grow 8.2% by 2022, according to PwC. As Spaniards are increasingly open to paying for news on digital platforms, the financial situation of the publishing business could improve (especially for those that have invested in online). Today, most of the Spanish news media have paywalls. **[can we have here 2-3 paragraphs about the success/lack of success of paywalls, any data on digital subscribers?, a table with the key media doing paywalls comparing the price of subscription? It can be done even through direct observation]**

The decline of the print media sector is also reflected in employment. In 2004, the print media in Spain had 11,141 employees. In 2013, it had fewer than 9,000 employees and two years later some 8,900 (working for both daily newspapers and magazines). The total employment in Spain’s media industry declined from 27,300 in 2013 to 26,900 in 2015. Public service media, both state and regional broadcasters, account for a large part of the overall workforce. They had 13,500 employees in 2015.

**Print media’s coffers**

**Key financial data for the largest daily publishers, €m, 2011-2017**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Print media publisher | Main office | Reference title | Sales revenues €m | | | | | | | Net profit €m | | | | | | |
| 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
| VOCENTO | Madrid | ABC | 444 | 384 | 428 | 416 | 407 | 386 | 365 | 28 | 21 | -24 | -22 | -18 | -17 | -20 |
| PRISA | Madrid | El País | 390 | 314 | 323 | 260 | 241 | 239 | 220 | 101 | -47 | -27 | -35 | -9 | -52 | -29 |
| Unidad Editorial | Madrid | El Mundo | 500 | 416 | 373 | 360 | 331 | 319 | 301 | -9 | -36 | -20 | -1 | -17 | -1 | 2 |
| Godó | Barcelona | La Vanguardia | 251 | 215 | 205 | 200 | 202 | 168 | 176 | 13 | 10 | 8 | 0.0 | 5 | 1 | -3 |
| Zeta | Barcelona | El Periódico | 272 | 239 | 215 | 203 | 194 | 178 | - |  |  |  |  |  |  |  |
| Editorial Prensa Ibérica | Barcelona | La Provincia Diario de Las Palmas | 248 | 211 | 202 | 201 | 180 | 178 | 175 | 22 | 23 | 3 | 11 | 2 | 6 | 5 |
| Henneo Media | Zaragoza | Heraldo de Aragón | 90 | 81 | 74 | 71 | 66 | 64 | - | -14 | -4 | 1 | -4 | -2 | -8 | - |
| Audiovisual Española | Madrid | La Razón | 76 | 66 | 65 | 65 | 63 | 63 | - | -5 | -4 | -1 | 0.1 | 0.1 | 0.4 | - |
| La Voz de Galicia | Coruña | La Voz de Galicia | 60 | 56 | 52 | 52 | 51 | 50 | 48 | -2 | 0.5 | 0.7 | 0.9 | 1 | 1 | 1 |
| Hora Nova | Palma de Mallorca | Última Hora | 43 | 38 | 35 | 32 | 30 | 28 | 27 | -0.6 | -.8 | -0.5 | -0.3 | -0.3 | -0.2 | -0.8 |
| Promecal | Burgos | Diario de Burgos | 33 | 34 | 30 | 33 | 31 | 30 | - | 2 | 2 | 0.5 | 0.6 | 0.7 | -0.3 | - |
| Grupo La Información | Pamplona | Diario de Navarra | 36 | 35 | 30 | 29 | 28 | 27 | 26 | 6 | 4 | 5 | 4 | 2 | 3 | 3 |
| Grupo Noticias | Bilbao | Deia | 34 | 29 | 26 | 25 | 24 | 24 | 24 | 0.3 | -0.2 | -.2 | -0.2 | -0.2 | -0.8 | 0 |
| Hermes Comunicacións | Barcelona | El Punt Avui | 19 | 21 | 19 | 20 | 18 | 19 | 18 | -5 | 0.4 | 0.7 | 0.5 | 0.1 | 0.3 | -2 |
| El Progreso | Lugo | El Progreso de Lugo | 18 | - | 16 | 16 | - | 15 | - | 0.1 | - | 5 | -0.5 | - | -0.3 | - |
| Inforcasa | Gran Canaria | Canarias 7 | 16 | 14 | 13 | 13 | 12 | 11 | - | -1.5 | 0.1 | -1 | 1 | 0.4 | 0.9 | - |
| Edició de Premsa Periódica ARA | Barcelona | Ara | 10 | 11 | 11 | 12 | 13 | 13 | - | -3.4 | -2.3 | -1.4 | -1.4 | -1 | -1 | - |
| Otura-Begar | León | Diario de León | 9 | 9 | 8 | 9 | 9 | 8 | 8 | 0.2 | 0.1 | 0.1 | 0.1 | 0.2 | 0.2 | 0.1 |
| Grup Segre | Lérida | Segre | 8 | 7 | 7 | 6 | 6 | 6 | 6 | 0.4 | 0.1 | 0.1 | 0.2 | 0.3 | 0.1 | 0.1 |
| Promotora Mediterránea de Información Comunicaciones | Tarragona | Diari de Tarragona | 8 | 7 | 7 | 7 | 7 | 6 | 6 | 0.2 | 0.2 | 0.3 | 0.4 | 0.2 | 0.5 | 0.1 |
| Novotécnica | Almería | La Voz de Almería | 7 | 6 | 5 | 6 | 5 | 5 | 5 | -0.1 | -0.2 | 0.2 | 0.1 | 0.1 | -0.1 | 0.1 |
| El Faro | Ceuta | El Faro de Ceuta | 2 | 1 | 1 | 2 | 2 | 2 | 2 | -0.1 | -0.1 | -0.4 | 0.4 | 0.1 | 0.1 | 0.1 |

Note: For the large multimedia groups, the financial data of their press subsidiaries are presented in this table. Some companies, such as the group Joly of Andalusia, where data are not available by business units, were not included in the table as it was difficult to estimate accurate figures just for their press business.

Source: SABI database and reports from CNMV

**Key** **financial data for the largest magazine publishers, €m, 2011-2017**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Press group | Main office | Number of titles | Refernce title | Sales revenues € | | | | | | | Net profit € | | | | | | |
| 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
| Hola | Madrid | 4 | Hola | - | 94 | 81 | 91 | 91 | 87 | - | - | 0.1 | 3 | -0.6 | -2 | 2 | - |
| Hearst España | Madrid | 16 | Diez Minutos | 92 | 71 | 62 | 60 | 60 | 60 | - | 5 | 2 | 10 | 2 | 1 | -2 | - |
| RBA | Barcelona | 20 | Lecturas | 79 | 67 | 60 | 61 | 58 | 55 | - | 5 | 5 | 5 | 6 | 4 | 4 | - |
| Condé Nast España | Madrid |  | Glamour | 55 | 52 | 45 | 44 | 45 | 45 | - | 2 | -0.1 | -5 | -0.3 | 0.1 | 0.2 | - |
| Heres | Barcelona | 6 | Pronto | 34 | 32 | 31 | 29 | 29 | 28 | - | 12 | 12 | 9 | 9 | 5 | 7 | - |
| Motorpress | Madrid | 14 | Automóvil | 29 | 25 | 21 | 21 | 23 | 22 | - | 2 | -5 | -4 | -5 | -2 | -0.6 | - |
| Axel Springer | Madrid | 2 | Auto Bild | 16 | 12 | 8 | 7 | 7 | 8 | 8 | -0.8 | -3 | -3 | -2 | -2 | -0.1 | -0.3 |
| Grupo V | Madrid | 10 | Alta Gama Motor | 14 | 14 | - | - | - | - | 10 | -.05 | -0.3 | - | - | - | - | -0.3 |
| Zinet | Madrid | 6 | Marie Claire | 7 | 7 | 5 | 6 | 6 | 7 | - | -1 | -5 | -2 | -1 | -1 | -0.4 | - |
| Prisma Publicaciones 2002 | Barcelona | 3 | Historia y Vida | 6 | 6 | 12 | 9 | 8 | 8 | - | -0.4 | -0.2 | -3 | -2 | -1 | -2 | - |
| Luike | Madrid | 2 | Autofácil | 5 | 4 | 3 | 3 | 3 | 4 | 3 | - | -0.1 | -0.2 | 0.1 | 0.2 | 0.1 | -0.1 |
| Premsa d´Osona | Barcelona | 2 | El Nou 9 | 4 | 4 | 3 | 3 | 4 | 4 | 4 | 0.1 | 0.1 | 0.1 | 0.2 | 0.2 | 0.1 | 0.2 |
| Curt Edicións | Barcelona | 1 | Skipper | 3 | 2 | 2 | 2 | 2 | 2 | 2 | -0.1 | -0.1 | -0.1 | -0.3 | -0.2 | -0.3 | -0.2 |
| Prensa Científica SA | Barcelona | 1 | Investigación y Ciencia | 1 | 1 | 1 | 1 | 1 | 1 | - | 0.1 | 0.1 | 0.1 | -0.1 | 0.1 | 0.1 | - |
| Grupo de Comunicación Sexta Marcha | Madrid | 1 | Motor 16 | 1 | 1 | 1 | 1 | 1 | 1 | - | 0.1 | 0.1 | 0.1 | -0.1 | 0.1 | 0.1 | - |
| Luxury | Madrid | 1 | Gentleman | - | - | - | 2 | 2 | 2 | 2 | - | - | - | 0.2 | 0.1 | 0.1 | 0.1 |
| Spain Media | Madrid | 2 | Forbes | 1 | 1 | 2 | 2 | 3 | 3 | 4 | 0.1 | 0.1 | 0.1 | 0.3 | -0.1 | 0.2 | 0.2 |
| Cavall Fort | Barcelona | 2 | Cavall Fort | 1 | 1 | 1 | 1 | 1 | 1 | 1 | -0.1 | -0.1 | -0.1 | -0.1 | 0.1 | 0.1 | 0.1 |
| Spain Key | Valencia | 1 | Avion Revue | - | 1 | 1 | 1 | 1 | 1 | 1 | - | 0.1 | 0.1 | -0.1 | -0.1 | 0.1 | -0.1 |
| Casual Magazines | Barcelona | 2 | Clio | 1 | 1 | 1 | 0.4 | - | - | 0.9 | 0.1 | -0.1 | 0.1 | -0.1 | - | - | 0.1 |

Note: the data for the magazines of the groups Vocento, Unidad Editorial, Zeta, Prensa Ibérica and Henneo refer to the sales in their overall print media business.

Source: SABI database and reports from CNMV

*New Players*

A clutch of new players have appeared on the Spanish online news market in the past decade, initiated and led in most cases by former managers in print media, most of them launched by journalists who used to work in traditional newsrooms. Many of them, including Elespanol.com, Elnacional.cat and [infolibre.com](http://infolibre.com), got financed in their early days through crowdfunding.

**[we need a short financial analysis here focused on how these new players are doing financially and how they fund themselves now: are they mainly making money from subscriptions, ads or else?]**

**Monetizing the internet**

**Key financial data for the largest online news portals, €m, 2011-2017**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Portal | Publisher | Main office | Founders | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
| Elconfidencial.com | Titania Editorial | Madrid | José Antonio Sánchez, Juan Perea | 0.27 | 0.29 | 0.29 | 0.91 | 1.62 | 1.96 | 3.20 |
| Elespañol.com | El León de El Español de Publicaciones SA | Madrid | Pedro J. Ramírez | - | - | - | - | -2.31 | -2.72 | -1.92 |
| Xataka.com | Weblogs SL | Madrid | Julio Alonso and Webedia | -0.13 | 0.12 | -0.31 | -0.19 | 0.22 | 0.53 | 0.71 |
| Okdiario.com | Dos Mil Palabras S.L. | Madrid | Eduardo Inda |  |  |  |  | -0.55 | -0.70 | 0.010 |
| Eldiario.es | Diario de Prensa Digital SL | Madrid | Ignacio Escolar | - | -0.006 | 0.013 | 0.21 | 0.21 | 0.34 | 0.29 |
| Publico.es | Display Connectors SL | Barcelona | Toni Cases, J. Roure, Tatxo Benet | - | -0.47 | -0.062 | 0.17 | 0.008 | - | - |
| Elnacional.cet | Grup Les Noticies de Catalunya | Barcelona | José Antich | - | - | - | - | - | -0.006 | 0.24 |
| Catalunyadiari.cat | Edicións Digitals del Camp S.L. | Reus, Tarragona | Alvar Thomas | - | 0.011 | -0.007 | 0.004 | 0.004 | 0.059 | 0.27 |
| Vilaweb.cat | Partal Maresme Associats S.L | Barcelona | Vicente Partal | -0.02 | -0.008 | 0.002 | 0.021 | 0.02 | 0.063 | - |
| Infolibre.es | Ediciones Prensa Libre S.L. | Madrid | Periodistas y donantes asociados | - | - | - | -0.35 | -0.22 | -0.11 | - |
| Elmont.cat | Editora Singular Digital 2GR | Barcelona | Salvador Cot, director | 0.003 | 0.044 | 0.008 | 0.051 | -0.091 | -0.057 | 0.021 |
| Periodistadigital.com | Periodista Digital SL | Madrid | Alfonso Rojo | 0.027 | 0.016 | 0.015 | 0.014 | 0.017 | 0.01 | 0.11 |

Source: Data processed for this report based on information from SABI database

**Influential News Media**

*All top four radio broadcasters shared the same audience profile in 2013: mainly male (6.6 million men compared to 4.8 million women, with an average age of 50.8 years, and an average level of education). In 2017, the audience profile of the generalist radio barely experienced any changes except for slight ageing. The typical radio listener was likely to be almost 53 years old that year.*

*The target group of the thematic radio channels is in general terms more gender-balanced (50.4% of the listeners are men), but some differences exist depending on the theme of the radio stations. For example, music radio stations have a slightly more feminine audience (50.7% of listeners are women), while news-focused radio channels have a male- dominated audience (71.1% are men). Also, there is a significant difference in terms of age groups on various thematic radio channels: the music radio public has an average of 38.1 years while the typical listener of news radio broadcasts is approaching 50 years of age (47.2 years to be precise).*

SER is also among the top preferences in the housewives segment where it has remained relatively stable for the last five years. The chain’s audience has been ageing from an average of 50.9 years in 2013 to 52.8 years in 2017. Unlike its rivals, SER is the chain that has promoted the most female voices. Two women present during the station’s five main programmes during the day.

A significant development was the spectacular growth of COPE’s audience in the housewives segment during the last five years, from 675,000 daily listeners and an 11.7% audience share in 2013 to 1.06 million and almost 20% in 2017. COPE’s public is the second oldest on the Spanish generalist radio market. The average COPE listener has 53.1 years, behind only RNE where the listener’s average age stars at 56.3.

In the housewives segment, unlike its competitors that improved their audience, Onda Cero lost 202,000 listeners in the segment during 2013-2017. The chain, owned by Atresmedia, also offers programmes of shorter duration during weekends such as Gente viajera (Traveling People) or Como el perro y el gato (Like the Dog and the Cat).

esRadio has listeners in all age segments over 35. Its typical public is male, around 54.6 years of age. The broadcaster increased its audience on the housewives segment by 45,000 new listeners since 2013. The strongest broadcast on esRadio is without doubt, in the morning slot, the programme Es la mañana (Morning Time), led by Jiménez Losantos, which continues to attract new listeners. It grew from 208,000 daily listeners in 2013 to 278,000 listeners in 2017. The second most popular time slot on esRadio is the night slot with the show En Casa de Herrero (In Herrero’s House), led by Luis Herrero, and the sports programme El Primer Palo (The First Stick) with Juanma Rodríguez. esRadio is also improving its audience data for the midday and evening slots with shows such as Es Noticia (News Time) and Es la tarde de Dieter (Dieter’s Afternoon).

The radio has an older public compared to the other three main nationwide channels, with an average of 56.3 years in 2017. RNE also saw growth on the housewives segment where it gained 84,000 daily listeners to reach a total of 673,000 listeners in the segment in 2017. News and current affairs shows on RNE are the most popular. Such is the morning news programme Las mañanas de RNE (RNE Mornings) with Íñigo Alonso aired from 6 a.m., and a show led by Alfredo Menéndez from 10 a.m.

*Regional tv*

Women account for a larger share of the audience drawn by these channels (54% compared to 46% men). More than three quarters of these channels’ audience are older than 45: viewers aged 45-64 and over 65 account for 44% and 32% of their total audience, respectively.

**Here we need 1-2 pages of analysis of influential media: I picked up from the report some parts about media that extra influence among women/men, in groups ages, among housewives. Norina: can you rewrite this into a cool analysis?**

**We also need a few words about media that are influential among business communities and other groups, if any, that is something that probably the Spain team should do.**

**Key Funders**

Non-Governmental Funders

*Advertising*

One of the key sources of funding in the Spanish news media sector is advertising. Ad spend in the media in Spain has been continuously increasing in the past five years. A total of €5.5bn was spent on advertising in the country in 2018, an increase of nearly 3% year-on-year, according to InfoAdex.

Television is the largest recipient of ad euros in Spain, accounting or nearly 40% of the total ad spend in 2018. The ad spending on television continually increased until 2017, but in 2018, it recorded a decline, albeit slight. Print media, on the other hand, recorded a continuous decline in ad revenues in the past five years in all its segments, daily newspapers, magazines and Sunday publications. Overall, the print media sector has seen a decline in ad revenue of more than 16% between 2014 and 2018.

In contrast, the sector that has continued to grow incessantly over the past decade was the internet. Between 2014 and 2018, online advertising in Spain grew by nearly 62% to €1.74bn, which is already the equivalent of 81% of the television ad spend in Spain. It is very unlikely, experts say, that advertising revenue online will exceed the volume of ad spending on television in a few years.

**The advertising pie**

**Advertising spending by medium in Spain, €m, 2014-2019**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Sector | 2014 | 2015 | 2016 | 2017 | 2018 | H1 2019 |
| Television | 1,890 | 2,011 | 2,121 | 2,143 | 2,127 | 1,042 |
| Internet | 1,076 | 1,249 | 1,407 | 1,548 | 1,743 | 382 |
| Dailies | 656 | 658 | 617 | 567 | 533 | 208 |
| Radio | 420 | 454 | 458 | 465 | 481 | 209 |
| Magazines | 254 | 255 | 252 | 240 | 227 | 105 |
| Sunday newspapers | 38 | 38 | 34 | 31 | 29 | 11 |
| Other\* | 331 | 351 | 345 | 361 | 372 | 158 |
| Total | 4,665 | 5,016 | 5,234 | 5,355 | 5,512 | 2,115 |

\*cinema and outdoor

Source: InfoAdex

Television is one of the key targets of ad funding in the overall media market in Spain. It is dominated by the two largest television broadcasters, Mediaset España and Atresmedia, which together control nearly 84% of the total television ad spend. Most of the ad funding spent on television goes into nationwide television, with regional broadcasters taking only a small share, which becomes even smaller from year to year. In 2018, the share of the regional broadcasters in the total television ad spend dived to under 5%.

**Commercial break**

**Television advertising spending in Spain, breakdown by channels and types of coverage, 2017-2019**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Television group | Ad revenue, €m | | | Share of total ad television spend (%) | | |
| 2017 | 2018 | H1 2019 | 2017 | 2018 | H1 2019 |
| Mediaset España | 927 | 922 | 450 | 43.3 | 43.3 | 43.2 |
| Atresmedia | 887 | 862 | 435 | 41.4 | 40.5 | 41.7 |
| Other nationwide television | 117 | 131 | 59 | 5.5 | 6.2 | 5.6 |
| Total free-to-air nationwide television | 1,931 | 1,915 | 943 | 90.1 | 90.0 | 90.5 |
| Regional television | 114 | 102 | 44 | 5.3 | 4.8 | 4.2 |
| Pay-TV | 95 | 107 | 54 | 4.4 | 5.0 | 5.3 |
| Total TV advertising | 2,143 | 2,127 | 1,042 | 100.0 | 100.0 | 100.0 |

\*cinema and outdoor

Source: InfoAdex

Spain's advertising market is dominated by several large industries that account for a big part of the total ad spend in the country. The automotive industry is by far the largest spender, with nearly €570m used to buy commercials in 2018, an increase of almost 11% compared to the year before. The three sectors with the largest advertising spending in 2018, car manufacturers, catering and finance, accounted for more than a third of the total ad spend in Spain, according to data from InfoAdex. In total, 14 industries spent at least €100m on ads in 2018.

**The advertising pie**

**Advertising spending by medium in Spain, €m, 2014-2019**

|  |  |  |
| --- | --- | --- |
| Sector | Spending (€ m) | Change, %, yoy |
| Automotive | 569.3 | 10.8% |
| Retail | 461.0 | -3.4% |
| Finance | 452.8 | 10.1% |
| Public and private services | 347.1 | -1.7% |
| Beauty and hygiene products | 338.0 | 2.9% |
| Foodstuffs | 311.5 | -2.8% |
| Culture, media | 305.6 | -2.8% |
| Telecoms and internet | 286.3 | 11.1% |
| Beverages | 194.8 | 1.7% |
| Transports and tourism | 194.6 | -4.5% |

\*cinema and outdoor

Source: InfoAdex

The ad market in Spain is highly concentrated and has a tendency to further concentrate in the hands of fewer big advertisers. In 2018, the 20 largest advertisers spent a combined €1.06bn on advertising, accounting for more than 28% of the total ad spend in the country, according to data for 2018 from InfoAdex. The year before, the group spent less than €1bn and accounted for 23% of the total ad expenditures in Spain.

**The big clients**

**Largest advertising spenders in Spain, 2017-2018**

|  |  |  |
| --- | --- | --- |
| Company | Spend (€ m) | |
| 2017 | 2018 |
| Volkswagen | 70.1 | 86.9 |
| El Corte Ingles | 89.6 | 85.3 |
| Orange Espagne | 73.0 | 74.1 |
| Linea Directa Aseguradora | 45.5 | 69.9 |
| Procter & Gamble España | 71.5 | 69.9 |
| L’Oreal España | 58.8 | 67.7 |
| PSAG Automoviles | 57.4 | 62.6 |
| Mutua Madrileña Automovilista | 48.8 | 58.3 |
| Seat | 39.4 | 49.3 |
| Renault España | 42.1 | 47.1 |
| Coca Cola | 43.0 | 45.7 |
| Telefonica\* | - | 43.4 |
| Reckitt Benckiser | 52.1 | 42.7 |
| Organizacion Nacional Ciegos | 49.4 | 42.5 |
| Vodafone España | 53.9 | 42.2 |
| Samsung Electronic Iberia | 45.4 | 41.0 |
| Ford España | 34.1 | 33.5 |
| Securitas Direct España | 28.8 | 33.1 |
| Fiat Chrysler\* | - | 33.0 |
| Opel España\* | - | 32.5 |
| Total | 993.4 | 1,060.6 |

\*not among the 20 largest advertisers in 2017

Source: InfoAdex

*Philanthropy*

**Funders funding media and access to information, in Spain; starting in year(s) 2009 - latest available [I checked Spain and Gates foundation didn’t show up in my search. Neither OSF. where did you find that? I found instead Catala Fondo de Mujeres]**

|  |  |  |
| --- | --- | --- |
| Funders | Value of Grants ($) | No of grants |
| Bill & Melinda Gates Foundation | 2.5m | 5 |
| Fundación ONCE | 2.1m | 38 |
| Open Society Foundations | 0.944m | 14 |
| Open Society Foundations Budapest | 0.290m | 1 |

Source: Media Impact Funders <https://mediaimpactfunders.org/>

Government Funding

The Spanish government spends significant amounts of funding in the media. By far, the largest contribution goes to RTVE, Spain’s public service broadcaster. In 2018, RTVE operated with a total budget of €916m, a slight decrease compared to the previous year, but still much higher than five years before. In 2018, the state subsidy to RTVE made directly from the state budget accounted for over 37% of RTVE’s total funding. The rest of the budget consists of funding from radio frequency rent fees and various taxes imposed on private companies, both telcos and broadcasters, which are all disguised forms of government funding. The current model of RTVE funding was established through a 2009 law, which eliminated advertising from the company’s funding sources.

Spain has a public radio-television system similar to Germany, with a state corporation (RTVE, like the German ZDF) and a regional network (Forta, grouping 12 public service media operators, similar to ARD).

The public service media in Spain are now a downsized operation compared to the 2000s. Back in 2003, the company had a staff of over 9,200. By 2009, the station’s workforce was slashed to under 6,400 people. The decline continued, but since 2015, however, the corporation started to hire, its staff swelling to nearly 6,500 by 2019. The overall financing of public television, both state and regional, declined by 27% between 2010 and 2016. That meant that per capita spend on public service media dropped from €60 to €43.8 during the period.

The income per capita of the regional public broadcasters decreased more, by 28.1%, between 2011 and 2016, from €38.4 to €27.6. In fact, the situation of regional public service broadcasters, which are funded through subsidies from regional government and advertising sales revenues, is much worse. Some of them, due to accrued debt and the general negative effects of the economic crisis, nearly collapses. The public service broadcaster in the region of Valencia was shut down in 2013, all its employees being dismissed. It resumed broadcasting in 2018. The crisis also prompted various public service broadcasters (Radio Televisión Madrid being one of them) to adopt new employment regulations, cut their programming and cancel contracts with external producers.

RTVE has six broadcasters airing in digital terrestrially DDT and five in HD. All are technically part of the Corporation for Spanish Radio and Television (*Corporación de Radio y Televisión Española*, CRTVE), which also runs 13 public regional broadcasters (12 of them are part of Forta; the only exception is Extremadura). CRTVE also runs six nationwide radio stations (RNE, Radio Nacional Espana) and its regional stations run between one and three channels each.

The government exerts influence in the public media in spite of resistance from the broadcaster’s professionals and criticism from civil society that calls for CRTVE’s independence.

**RTVE budget, in €m, 2014-2018**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Source of income** | **2013** | **2014** | **2015** | **2016** | **2017** | **2018** |
| Funds from radio frequency rent fees | 330 | 330 | 330 | 380 | 380 | 380 |
| State subsidies | 292 | 290 | 297 | 344 | 345 | 341 |
| Taxes on private television and pay-TV operators | 58 | 54 | 79 | 67 | 67 | 68 |
| Taxes on telecom operators | 108 | 96 | 104 | 123 | 127 | 126 |
| Other\* | 8 | 7 | 3 | 2 | 2 | 1 |
| Total | 796 | 777 | 813 | 916 | 921 | 916 |

\*including funds from the ministry of education and science, donations and other small contributions

Source: CMDS, based on data from RTVE

**RTVE, staff and pay, 2013-2018**

|  |  |  |
| --- | --- | --- |
| **Year** | **No of employees** | **Average monthly salary (€)** |
| 2013 | 6,324 | n/a |
| 2014 | 6,302 | n/a |
| 2015 | 6,277 | n/a |
| 2016 | 6,290 | n/a |
| 2017 | 6,295 | n/a |
| 2018 | 6,458 | 4,136 |

n/a: not available

Source: CMDS compilation and calculations based on RTVE data and information from annual reports

Besides the funding for the public service media, the Spanish government spends every year on institutional advertising, using funding from the central administration. In 2017, the central government planned to spend roughly €206m on institutional advertising, an increase of over 65% compared to the year before. **[any idea why these fluctuations in spending from year to year: any political reasons? any criticism that this funding is located non-transparently?]**

Regional governments, particularly those in Catalonia, the Basque country and a few other regions, are known to also spend significant amounts in the media, but they do not publish data about their spending.

**Media services shopping**

**Ad spend by central administration in the media, €m, 2011-2016**

|  |  |  |
| --- | --- | --- |
|  | Planned | Spent |
| 2011 | 222.6 | 217.3 |
| 2012 | 137.5 | 93.6 |
| 2013 | 130.1 | 116.3 |
| 2014 | 147.0 | 140.6 |
| 2015 | 169.4 | 132.0 |
| 2016 | 124.7 |  |
| 2017 | 205.9 |  |

Source: CMDS based on government data

1. Álvaro P. Ruiz de Elvira, “La caída de los informativos de Cuatro: la frustración de un grupo de profesionales” (The fall of the news programs at Cuatro: the frustration of a group of professionals), El País, 10 January 2019, available online at <https://elpais.com/cultura/2019/01/09/television/1547034408_976563.html> (accessed on 15 September 2019). [↑](#footnote-ref-1)
2. For the financial analysis in this report, authors used information from corporate annual reports, data from the competition authority CNMV about companies listed on the stock exchange, information from the World Press Trends publication published by the World Association of Newspapers and News Publishers (WAN-IFRA), Infoadex, the Annual Report of the Journalism Guild of the Madrid Press Association (Informe Anual de la Profesión Periodística de la Asociación de la Prensa de Madrid) and Media Outlook 2018-2022, a publication of the global consultancy PricewaterhouseCoopers, PwC. [↑](#footnote-ref-2)