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A future proof monitoring system:
Assessing diversity of news media
exposure in a European setting

Vilnius, 4th October 2013



Content

- Part I: The Dutch monitoring system of media concentration and diversity
- Part II: Conditions of a future proof monitoring system
- Part III Assessing diversity of news media exposure in a European setting



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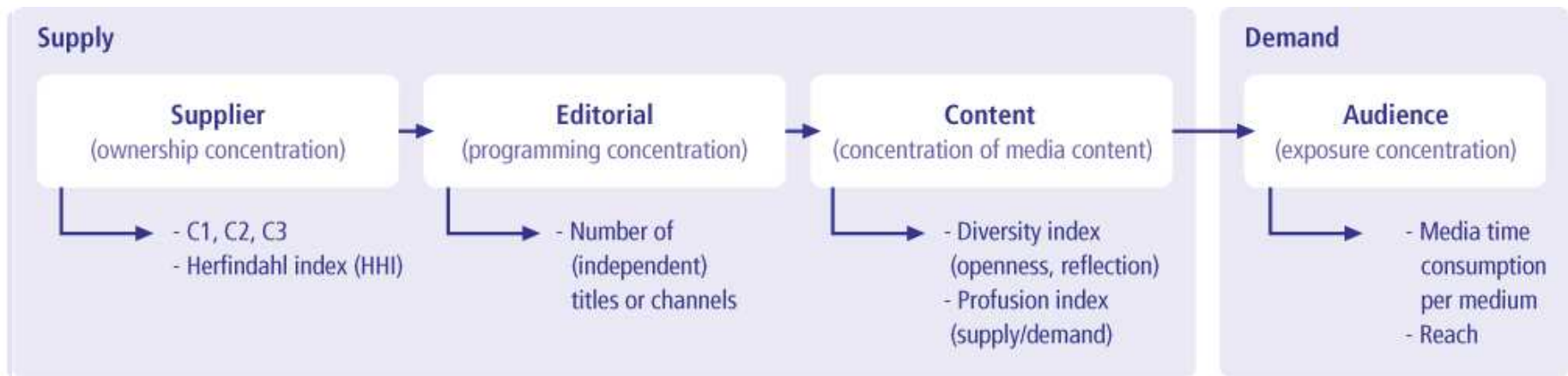
Part I

The Dutch monitoring system of media
concentration and diversity

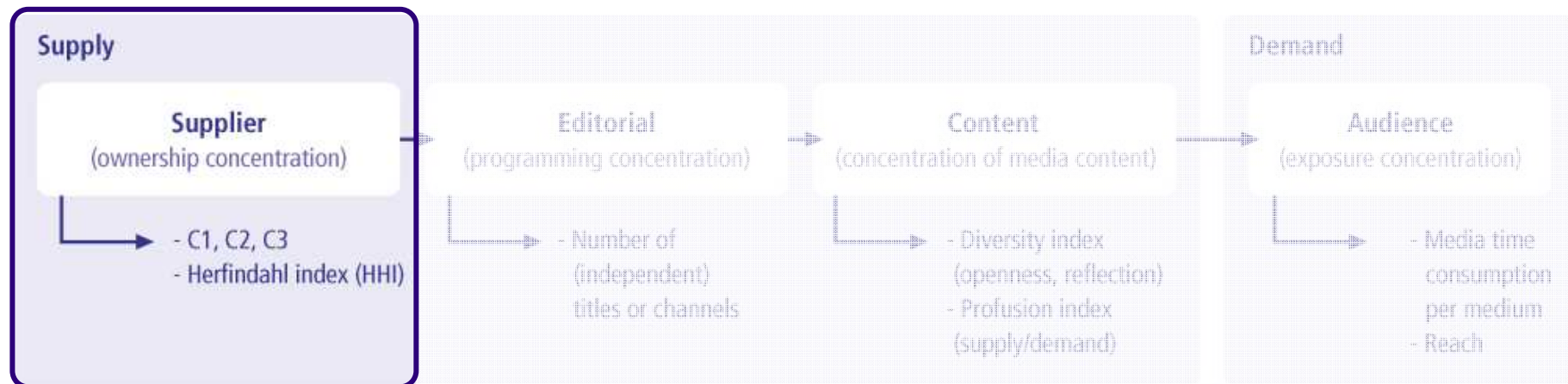
Monitoring model

- Levels of media concentration

Statistical indexes per type of media concentration

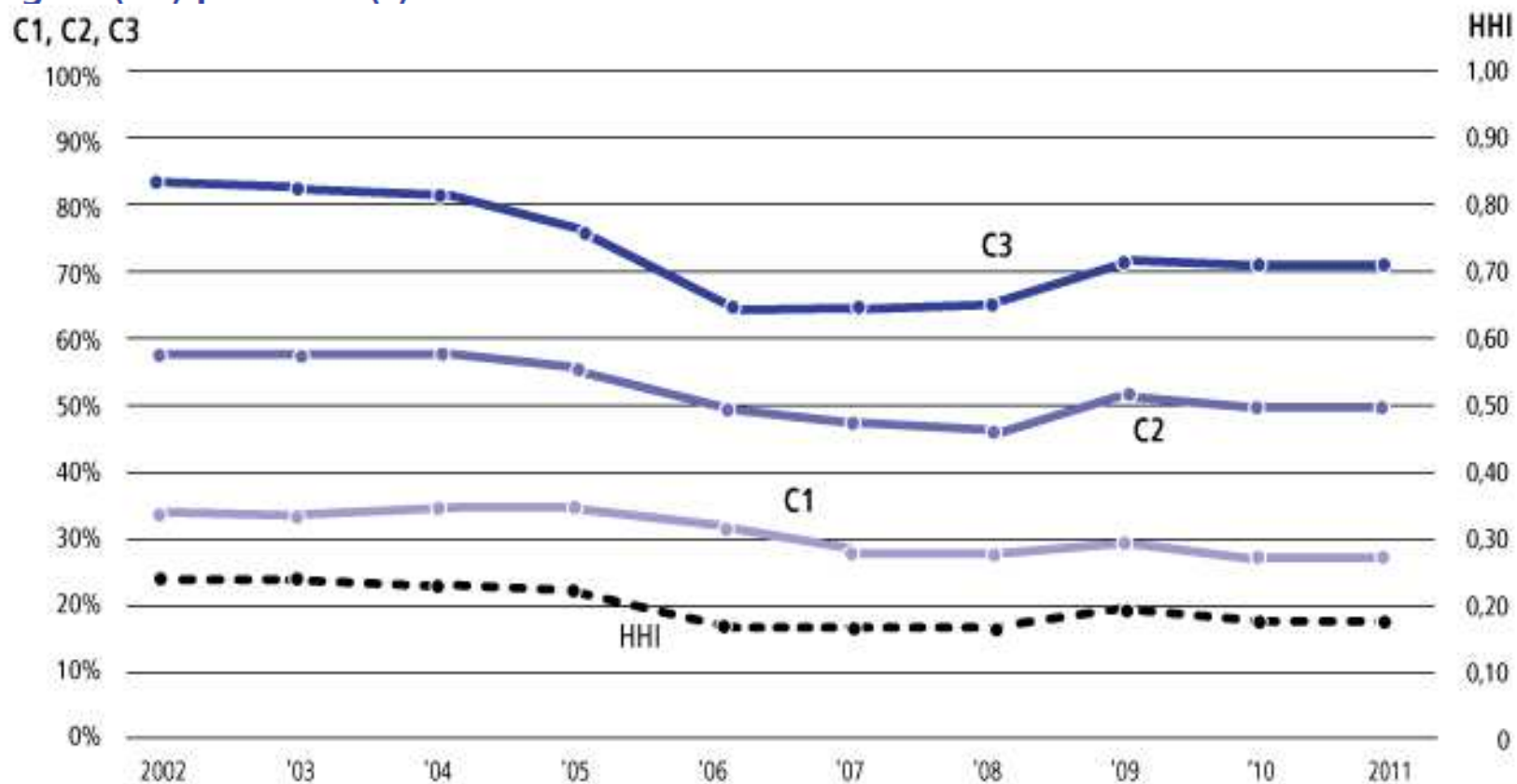


Supplier concentration



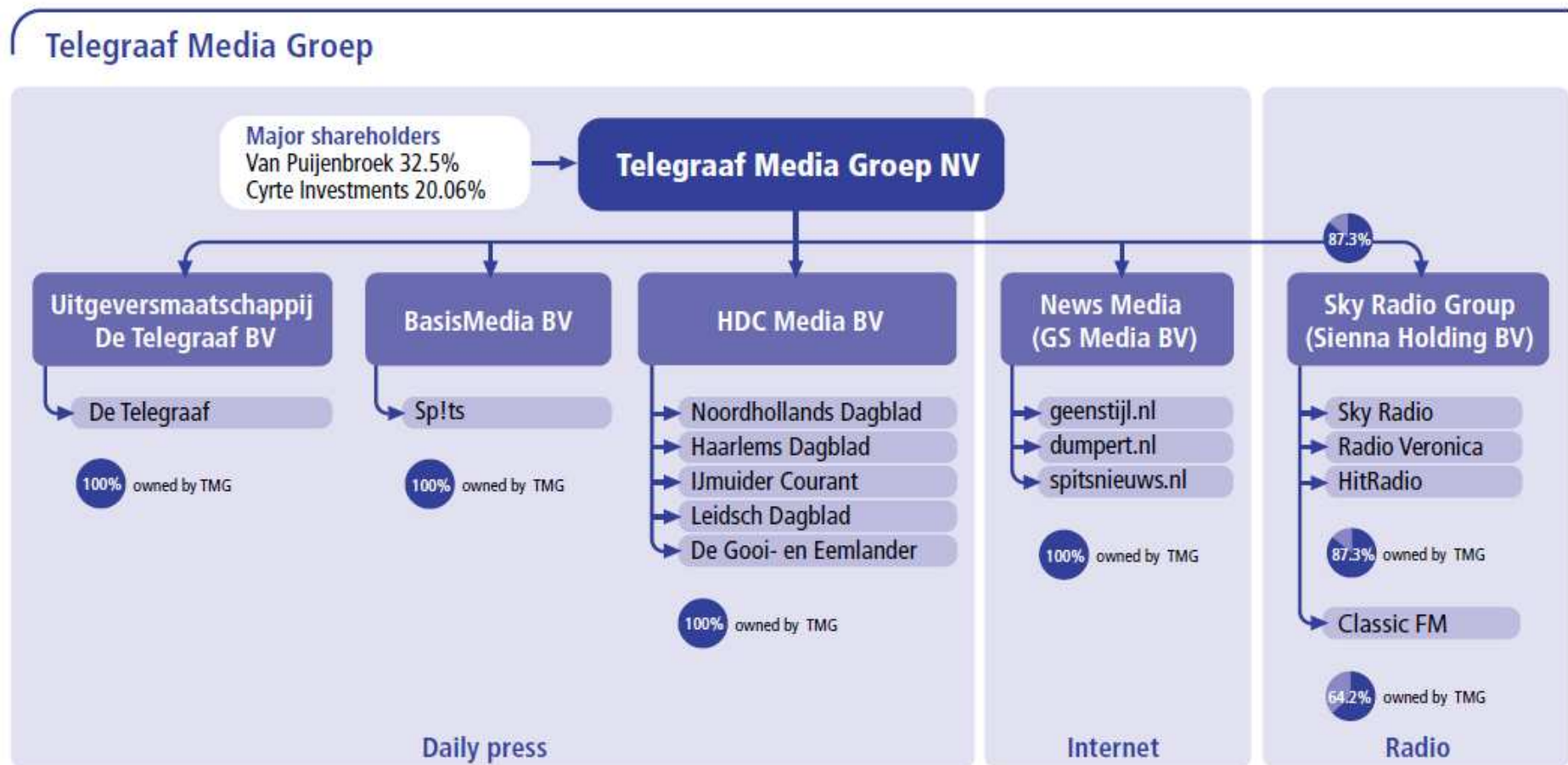
Supplier concentration: C1-3 and HHI

Daily newspaper market: share of the largest (C1), two largest (C2), and three largest (C3) publisher(s)

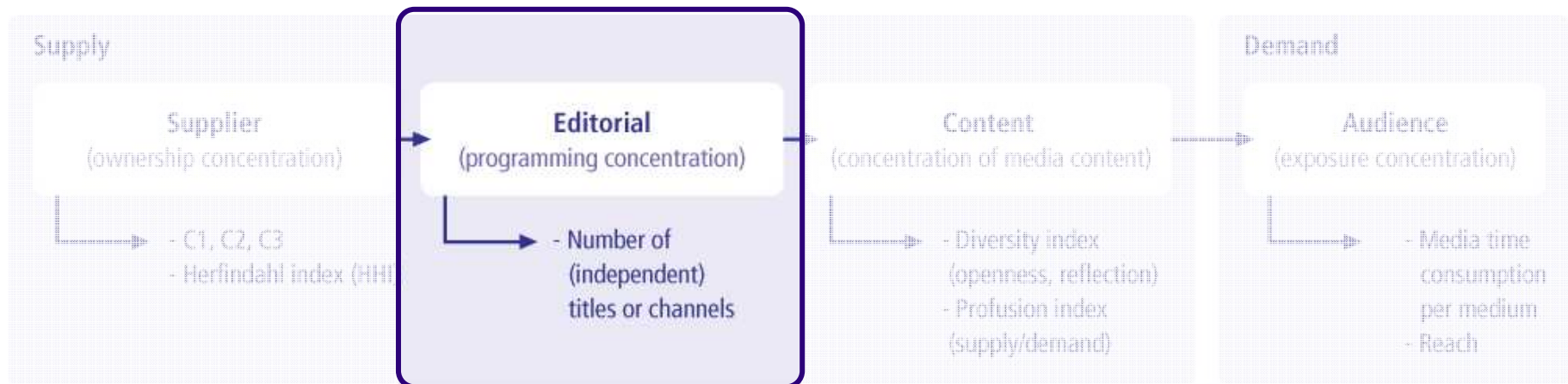


Bron data: Cebuco / HOI Online

Supplier concentration: ownership structures

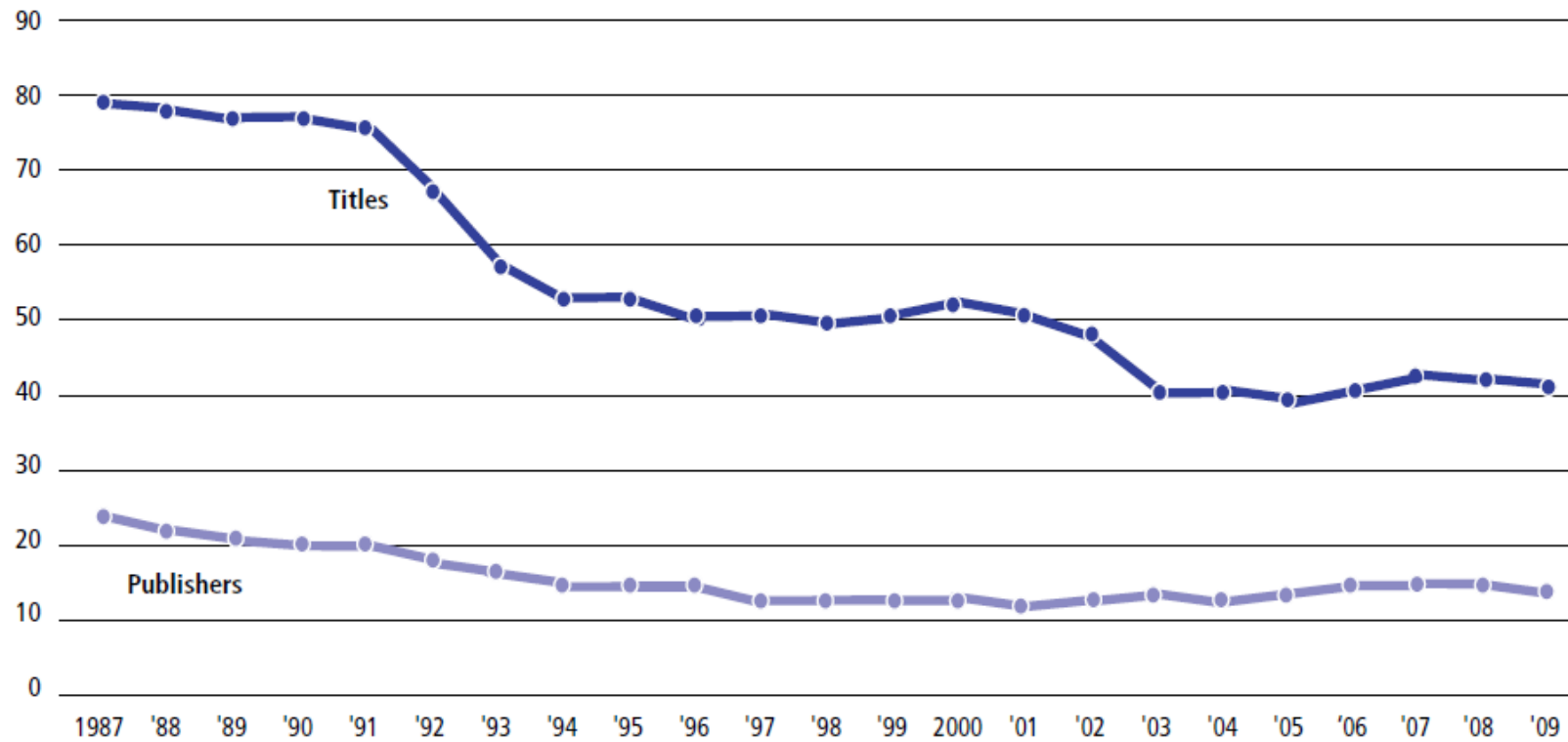


Editorial concentration



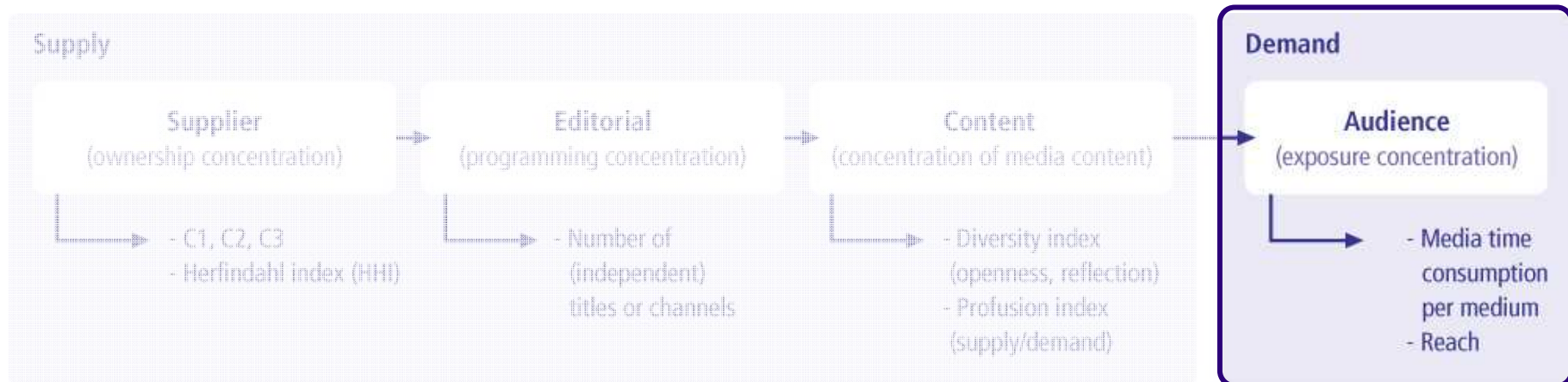
Editorial concentration

Number of publishers/titles on the national daily newspaper market



Data source: Cebuco / Hoi Online

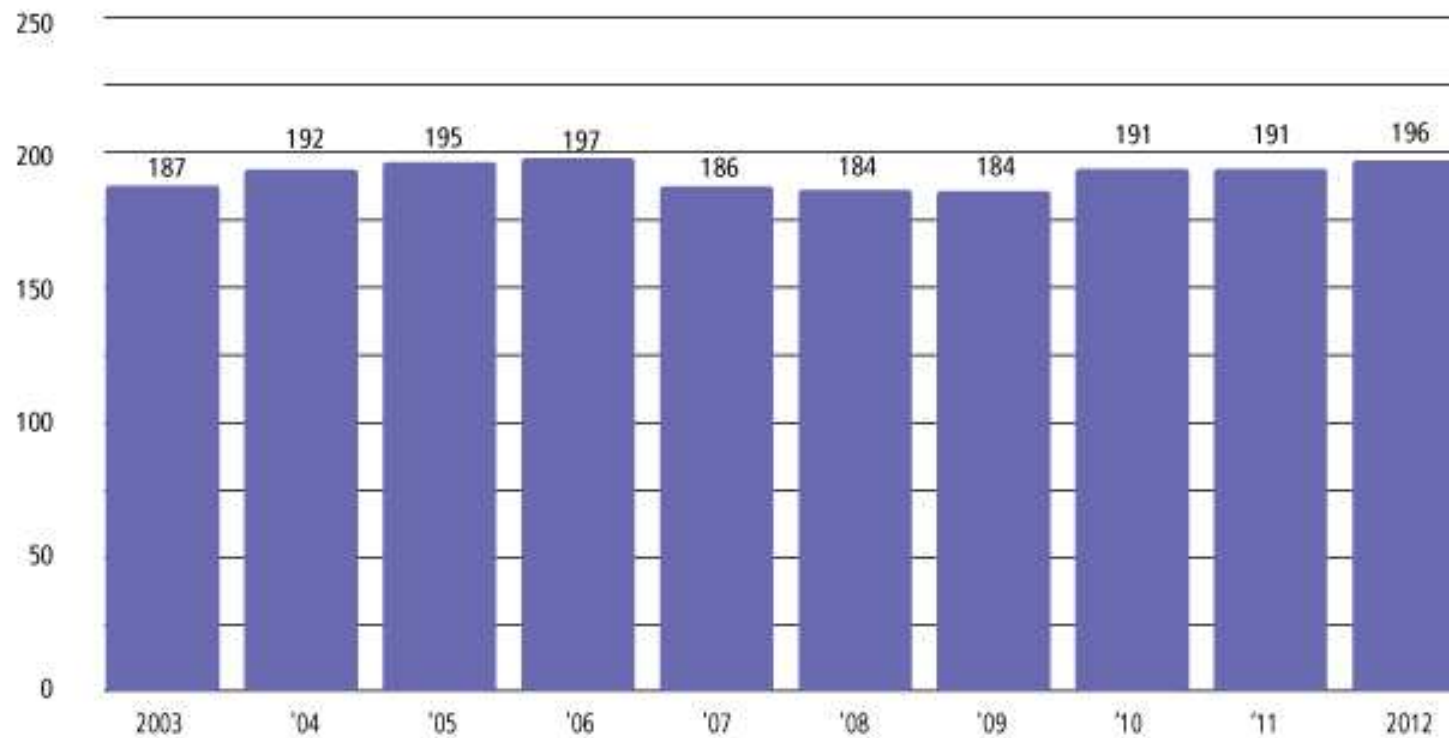
Audience concentration: the user



Audience concentration: total viewing time

Figuur 3.4

Gemiddelde kijktijd per dag (in minuten)



Bron data: Stichting KijkOnderzoek (tijdvak 00-24 uur / 6 jaar en ouder)

Audience concentration: reach

Bereik Nederlandse nieuwssites en weblogs

Website (gerangschikt naar bereik 2011)	Bereik (In procenten, vanaf 4 procent in 2011)				
	2007	2008	2009	2010	2011
nu.nl	22,4	30,3*	34,9	37,1	38,1
nos.nl	17,7	19,5	25,9	29,4	31,9
telegraaf.nl	18,0	23,6	24,6	24,4	25,5
ad.nl	13,2	16,4	14,4	20,1	20,3
fok.nl	4,0	4,4	3,8	11,8	13,2
zie.nl			5,3	12,3	12,5
vk.nl	9,5	8,9	14,7	9,6	10,4
nrc.nl	5,8	7,6	7,2	6,2	7,2
dichtbij.nl					6,5
blog.nl	4,5	5,9	8,6	7,9	6,4
destentor.nl	2,8	3,5	4,6	4,7	5,8
geenstijl.nl	5,1	4,4	5,0	4,6	5,5

Audience concentration: exposure diversity

Market shares in the Dutch television market

Broadcaster (ranked according to 2009 market share)	Channel	Market shares (percentage)		
		2001	2005	2009
Nederlandse Publieke Omroep		36.0	33.3	33.9
	Nederland 1	11.8	11.9	20.0
	Nederland 2	16.2	15.1	6.7
	Nederland 3	8.0	6.3	7.2
RTL Nederland		24.7	23.5	24.2
	RTL4	15.0	14.7	13.6
	RTL5	4.3	4.6	4.4
	Yorin/RTL7	5.4	4.2	4.5
	RTL8			1.7
SBS Nederland		15.8	17.1	18.3
	SBS6	10.2	9.8	10.9
	Net 5	3.7	4.3	4.3
	V8/Veronica	1.9	3.0	3.2
MTV Networks		2.0	4.0	4.6
	MTV	0.4	0.7	0.8



Is our monitoring model future proof?

- Is a platform approach to media concentration still appropriate?
- Is a supplier dominated approach still appropriate?
- Is a national approach still appropriate?



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Part II

Conditions of a future proof monitoring system



A future proof monitoring system

What is needed:

- a functional & platform independent approach
- a user oriented approach
- an international approach
- a practical approach



Towards a functional approach

- Functional approach instead a media type driven approach
- 5 different content types:
 - News and opinion (including current affairs and debate);
 - Special information;
 - Culture, arts, education;
 - Entertainment;
 - Commercial communication.



Functional approach

- Estimates of the risk to society regarding different values for each function
- Independent and high-quality news and opinion content is essential for a society

Content types: risk to society

	News & Opinion	Specialist	Arts and Culture	Entertainment	Advertising
Diversity	++	-	+	-	-
Independence	++	++	+	-	+
Quality	++	++	+	-	+

Key: ++ = risk, + = no direct risk, - = no risk



Focussing on news: the news 'market'

A Dutch pilot study:

- Research project on the news 'market' (2007)
- 1,195 Dutch surveyed about their (news) media use at title level
- Exposure to 90 individual news titles (or: services), belonging to different suppliers

Reach of news, news market share and market share according to the Temporary Act Media Concentration (Twm) in 2007 (percentage)

	Reach of news media	Share of news media market	Average market share according to Twm
NPO	78.1	44.5	26.5
RTL	53.0	15.4	12.1
Telegraaf Media Groep	32.1	8.0	14.4
SBS	32.3	7.3	6.5
Mecom	19.2	5.7	6.2
PCM	12.9	4.4	6.3
Sanoma	18.1	3.0	0.0
AD Nieuwsmedia	7.9	2.4	2.9
NDC / VBK de uitgevers	4.6	1.5	1.5
Metro Holland	9.4	1.3	3.1
De Persgroep	5.9	1.1	2.7
Mountain Media	4.4	0.5	2.9
Arrow Media Group	2.1	0.2	1.3
MTV Networks	0.0	0.0	1.6
Other		4.7	12.0
Total		100	100

Note: The Temporary Act Media Concentration was in force from 2007 until 2010.

Building upon the idea of the ‘news market’

- Despite various institutions and scientists concerned with media pluralism, no permanent monitoring system exists at the European level
 - Focussing on the media’s news function allows the set up of a low-key monitoring system for opinion power
- *Research idea: EU monitoring system*



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Part III

Assessing diversity of news media exposure in
a European setting

EU monitoring system

- A cross-national and longitudinal study on the diversity of news media exposure
- Conducted every two years among European citizens.
- Monitoring news services which provide news and current affairs on a daily basis via the platforms: written press, television, radio or internet.
- The use of news media is investigated at title level by means of a survey.

Research questions

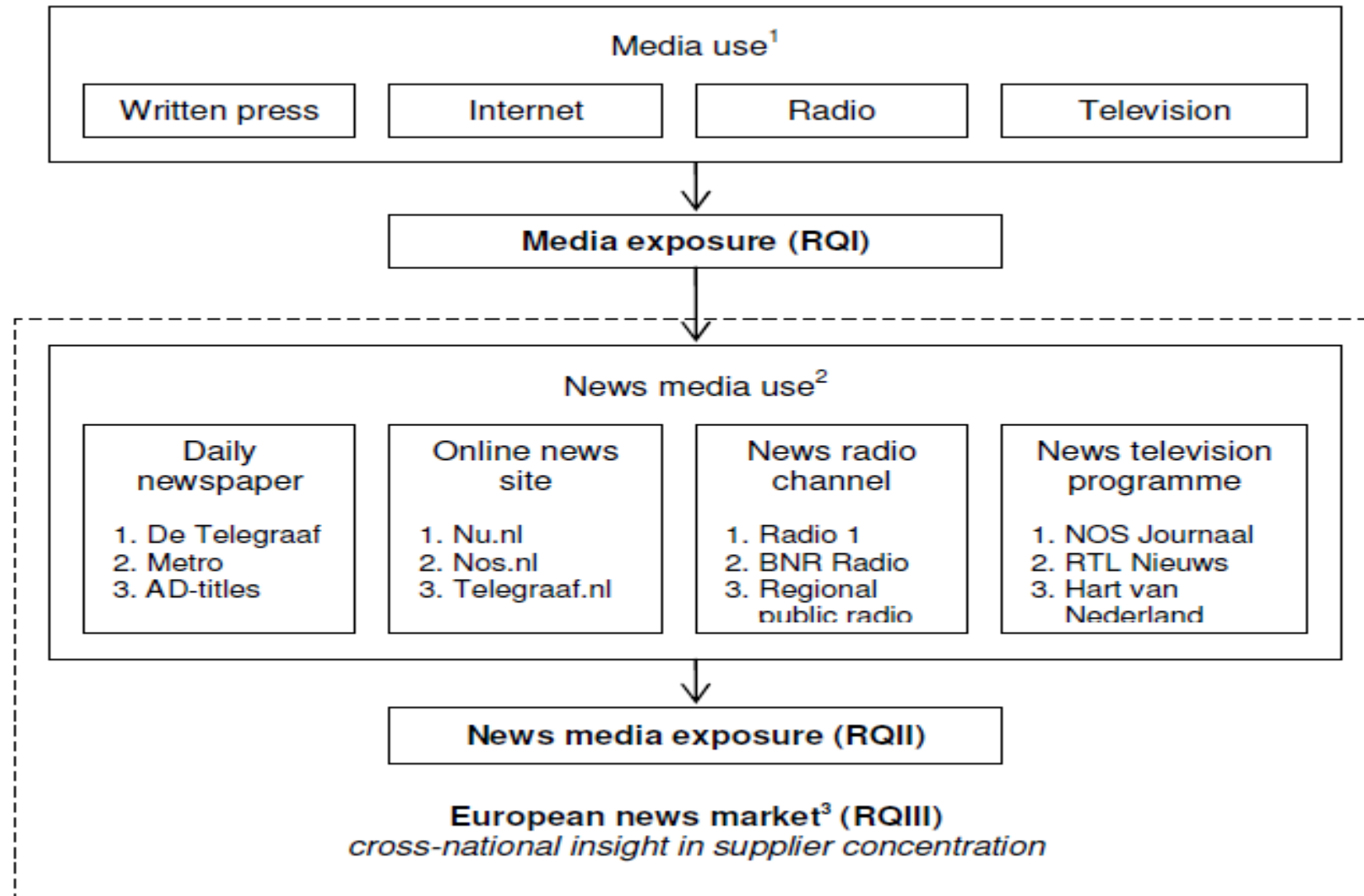
Key question: How does the diversity of news media exposure vary between and develop within the European Union's Member States?

RQ I. What is the diversity of exposure to media of citizens in the European Member States (via written press, television, radio and internet) and how does it develop within and vary between platforms?

RQ II. What is the diversity of exposure to news media of citizens in the European Member States (via written press, television, radio and internet) when gathering information specifically about news and current affairs?

RQ III. How does supplier concentration develop in the European news market?

Schematic representation: country model



Results

The outcomes of the European monitoring system should provide:

- insight in media use within and between the written press, television, radio and internet
- insight in news media use on the level of daily newspaper titles, news television programmes, news radio channels and online news sites
- insight in supplier concentration in the European 'news market'
- insight in the development of (news) media exposure and supplier concentration within all European Member States

What is needed?

1. A central organisation managing and coordinating the research project:

e.g.

The European Audiovisual Observatory
and/ of The Centre for Media Pluralism
and Media Freedom?

What is needed?

2. Survey as part of existing comparative research projects:

e.g.

The standard Eurobarometer



PUBLIC OPINION

European Commission > Public Opinion > Archives

Eurobarometer surveys

Eurobarometer Interactive Search System

This section of the website gives you access to the search tool for our Trends-questions database.

Standard EB

Special EB

Flash EB

EB Qualitative

Public Opinion and ...

What's new ?

Archives

Standard Eurobarometer

The standard Eurobarometer was established in 1973. Each survey consists of approximately 1000 face-to-face interviews per country. Reports are published twice yearly. Reproduction is authorized, except for commercial purposes, provided the source is acknowledged.



Recent standard Eurobarometer		
Year	Spring wave	Autumn wave
2013	<u>79</u>	80
2012	<u>77</u>	<u>78</u>
2011	<u>75</u>	<u>76</u>
2010	<u>73</u>	<u>74</u>
2009	<u>71</u>	<u>72</u>
2008	<u>69</u>	<u>70</u>
2007	<u>67</u>	<u>68</u>
2006	<u>65</u>	<u>66</u>
2005	<u>63</u>	<u>64</u>
2004	61	62

What is needed?

3. Collaborating national regulatory bodies:
responsible for recent listings of news
titles on a yearly base:

e.g.

all EPRA members or a core group of
regulators representing different parts of
Europe

Interest in the News media monitor

1. Do you think that the monitor is a useful instrument to measure diversity?
(Yes=raise hand)
2. Are you willing to actively participate on a regular base?
(Yes=raise hand)





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Thank you

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