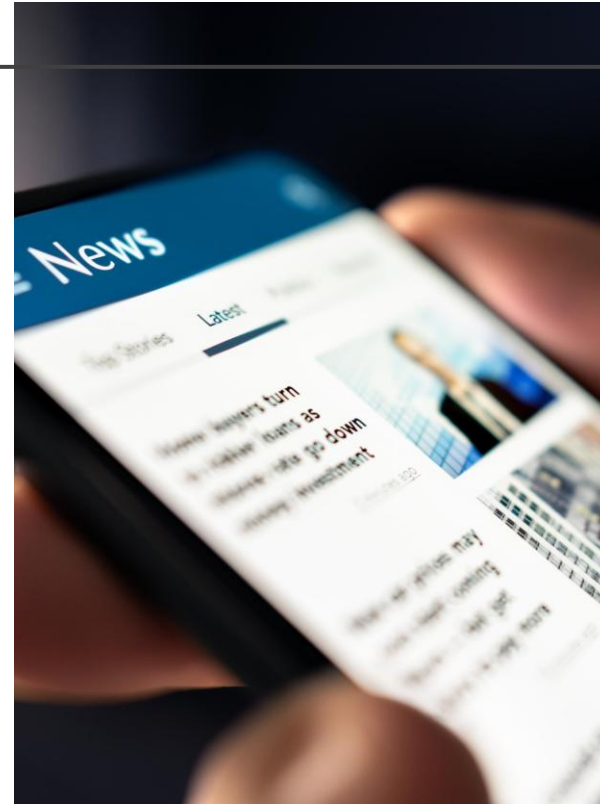


Analysis of the competition landscape of Philippine Mass Media

**Conversations on Media, Communication,
and Development**

November 13, 2025

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Outline

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- Policy context and objectives
- Conceptual framework and methodology

The competition landscape

- Media ownership in the Philippines
- Market concentration and diversity in Philippine media

Challenges and the digital shift

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- Challenges and opportunities

Conclusion

Introduction

Definition

MASS MEDIA - “**Primary** means of **communication** used to reach the **vast majority** of the general public” (PSA 2025)

Policy context

Contribution to GDP & employment, the creative sector, and the digital economy

- Supports markets and improving governance.
- Key elements to **reduce the asymmetry** of information and the constraints (Islam 2002, Banerji et al. 2002):
 - ✓ Independence - the nature of ownership, lack of financial autonomy, various media regulations (e.g., licensing, content laws, and defamation and insult laws).
 - ✓ Quality - Weak competition, inadequate capacities of journalists, and difficulty in accessing public information.
 - ✓ Reach - High barriers to entry and expansion, low levels of literacy, and lack of access to technology.

Specific objectives

- PDP 2023-2028; PIDS Research Agenda 2020-2025
- Assess the **size and distribution** of the Philippine media sector;
- Identify the **challenges** to competition and growth; and
- Understand how **technological change** is disrupting the media sector.

Conceptual Framework: Layered media model

Layer 1	Layer 2	Layer 3	Layer 4
Product/Content	Distribution Mechanism	Receiving/Display Devices	Personal Storage Options
Print News & Literature	Newspaper & Magazine Delivery Internet sites, Software, Mobile devices	Newsprint, Books PCs, Internet sites, Mobile devices & PDAs	Books, Personal Library PDAs, Computer discs and hard drives, Online storage, Printers
Television Programming Video	Broadcast TV Stations, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	TV Sets, Computer monitors, Mobile devices & Handheld devices	None (previously), PVRs (i.e. TiVo), VCRs, DVDs, Computer discs and hard drives, Online storage
Movies	Cinemas, Broadcast TV, Cable, Satellite, Internet & Online Stores, VHS tapes, DVD discs, VOD, PPV, P2P	Movie Theater TV Set, Computer Monitor, Personal Digital Devices	None (previously) VCRs, DVDs, Computer discs and hard drives, Online storage
Radio Programming Music Audio	Radio, Records, Tapes Broadcast Radio, Satellite Radio, Internet Sites & Online Stores, Podcasts, P2P	Radio, Reel-to-reel tape decks, Stereos, Home & car radios, Stereos, iPods, MP3 Players & other personal digital devices, websites	Records and tapes CDs, Tapes, Personal digital devices, Computer discs and hard drives, Online Storage
Advertising	TV, Radio, Mail, Magazines, Cable, Satellite, Mobile devices & PDAs, E-mail	Almost anything	Rarely stored
Online Content & Services	Phone, cable & wireless networks, IM, Portals, Blogs, Search Engines, Social Network Sites, RSS aggregators	Computer Monitor, PDAs, Cell Phones, TV Sets	Computer discs and hard drives, online storage, Personal digital devices
Video Games	Video game platforms, Discs, Computer software, Internet & Online stores, Mobile networks	TV Sets & computer monitors, Handheld gaming units, Mobile devices & PDAs	CDs/DVDs, Computer discs and hard drives

Source: Thierer and Eskelen (2008)

Media and Entertainment Value Map

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

Note: List under each component is not exhaustive.

Source: WEF (2020)

Methodology

to assess the competition landscape

Measures of concentration and market power at the national and sub-national levels

- **n-Firm Concentration Ratio** (in this paper - CR4)
- **Herfindahl-Hirschman Index (HHI):**
 - HHI < 1,000 - Unconcentrated (U)
 - $1,000 \leq \text{HHI} \leq 1,800$ - Moderately concentrated (MC)
 - $1,800 < \text{HHI}$ - Highly concentrated (HC)
- **The Media Ownership and Concentration Diversity Index (MOCDI or Noam Index)** – modified HHI

Sources of data

- Annual Survey of Philippine Business and Industry – 2013, 2017, 2021
- Philippine Media Ownership Monitor (MOM-PH) database (VERA Files & Global Media Registry) - 2023
- PSE financial statements
- Statista

Multi-country projects

Media Ownership Monitoring System (PH project: Vera Files)

- Espouses media pluralism, internal (e.g. representation) and external (e.g. media ownership)
- A tool for transparency and good governance

Global Media and Internet Concentration Project

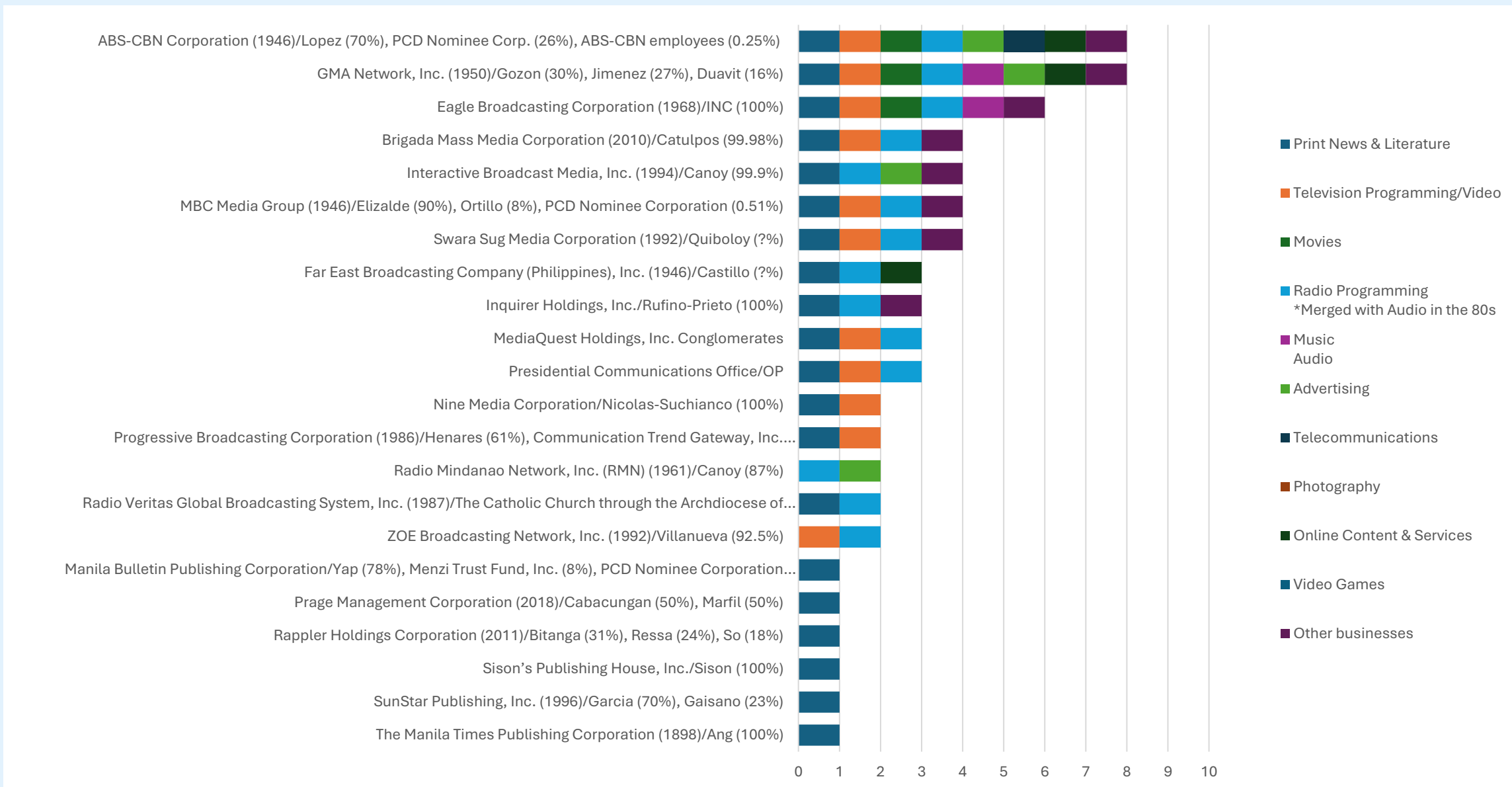
- Examines traditional and digital media industries across 40 countries over time
- Market concentration (Concentration Ratios, Herfindahl-Hirschman Index, and Noam Index)

Media Pluralism Monitor (Centre for Media Pluralism and Media Freedom)

- Analyzes levels of plurality in media systems based on 4 key dimensions: Fundamental Protection, Market Plurality, Political Independence, and Social Inclusiveness.
- EU member states and candidate countries

The competition landscape

Media ownership



Note: The figure only represents the existence of a specific product/content for each media companies. It does not reflect the number of media outlets associated with each product/content.

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

Market concentration and diversity

Sub-classes covered



Publishing of newspapers, journals and periodicals (J58130)



Radio broadcasting and relay station and studios (J60101)



Television broadcasting and relay stations and studios (J60201)



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



Wireless internet access service activities (e.g. Internet Service Provider, broadband) (J61103)



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

Publishing of newspapers, journals and periodicals (J58130), 2021

Region	Number of establishments	CR-4	HHI (computed value)	Market type*	MOCDI
REGION I (Ilocos Region)	2	100%	5855	HC	4140
REGION II (Cagayan Valley)		-			
REGION III (Central Luzon)	1	100%	10000	HC	10000
REGION IV-A (CALABARZON)	5	88%	2163	HC	967
REGION V (Bicol Region)	1	100%	10000	HC	10000
REGION VI (Western Visayas)	6	95%	4139	HC	1690
REGION VII (Central Visayas)	6	100%	4535	HC	1851
REGION VIII (Eastern Visayas)	2	100%	5129	HC	3627
REGION IX (Zamboanga Peninsula)	2	100%	5018	HC	3548
REGION X (Northern Mindanao)	1	100%	10000	HC	10000
REGION XI (Davao Region)	4	100%	4711	HC	2356
REGION XII (Soccsksargen)		-			
NATIONAL CAPITAL REGION (NCR)	32	83%	2446	HC	432
CORDILLERA ADMINISTRATIVE REGION (CAR)	3	100%	4724	HC	2727
REGION XIII (Caraga)		-			
REGION IV-B (MIMAROPA)		-			
BARMM		-			
National	65	79%	2205	HC	274

*Market type: U - Unconcentrated Market, MC - Moderately Concentrated Market, HC - Highly Concentrated Market

Radio broadcasting and relay station and studios (J60101), 2021

Region	Number of establishments	CR-4	HHI (computed value)	Market type*	MOCDI
REGION I (Ilocos Region)	26	38%	506	U	99
REGION II (Cagayan Valley)	12	52%	753	U	217
REGION III (Central Luzon)	14	52%	865	U	231
REGION IV-A (CALABARZON)	15	45%	664	U	171
REGION V (Bicol Region)	30	43%	912	U	166
REGION VI (Western Visayas)	42	23%	196	U	30
REGION VII (Central Visayas)	41	31%	512	U	80
REGION VIII (Eastern Visayas)	10	84%	3620	HC	1145
REGION IX (Zamboanga Peninsula)	26	77%	2460	HC	482
REGION X (Northern Mindanao)	38	44%	698	U	113
REGION XI (Davao Region)	24	50%	737	U	150
REGION XII (Soccsksargen)	34	48%	892	U	153
NATIONAL CAPITAL REGION (NCR)	35	67%	2663	HC	450
CORDILLERA ADMINISTRATIVE REGION (CAR)	13	41%	459	U	127
REGION XIII (Caraga)	30	46%	669	U	122
REGION IV-B (MIMAROPA)	9	64%	1006	MC	335
BARMM	5	98%	4502	HC	2013
National	404	30%	528	U	26

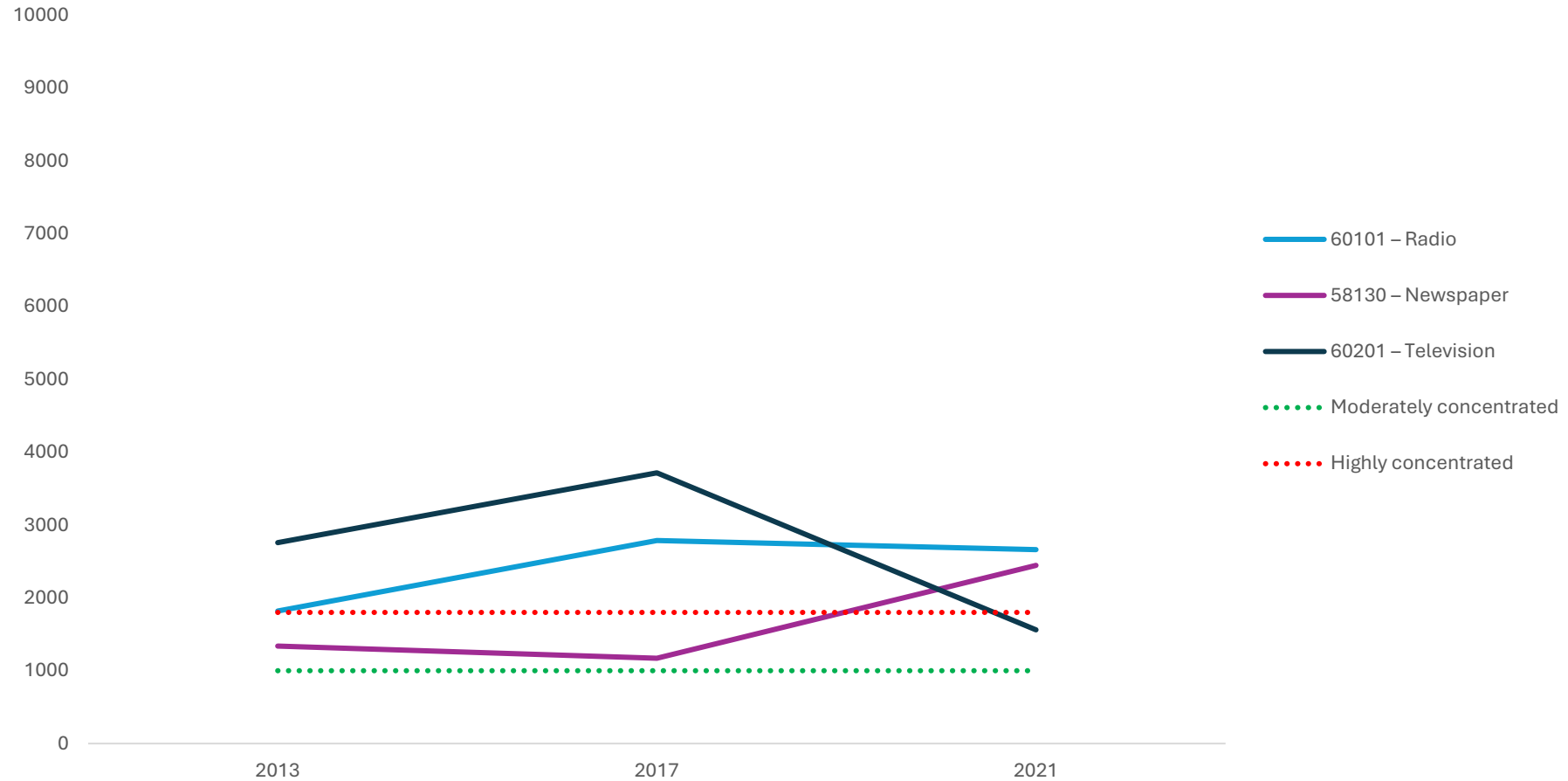
*Market type: U - Unconcentrated Market, MC - Moderately Concentrated Market, HC - Highly Concentrated Market

Television broadcasting and relay stations and studios (J60201), 2021

Region	Number of establishments	CR-4	HHI (computed value)	Market type*	MOCDI
REGION I (Ilocos Region)	4	100%	9639	HC	4819
REGION II (Cagayan Valley)	2	100%	5029	HC	3556
REGION III (Central Luzon)	1	100%	10000	HC	10000
REGION IV-A (CALABARZON)	4	100%	8203	HC	4102
REGION V (Bicol Region)	2	100%	6859	HC	4850
REGION VI (Western Visayas)	6	97%	2686	HC	1096
REGION VII (Central Visayas)	4	100%	7350	HC	3675
REGION VIII (Eastern Visayas)	2	100%	8083	HC	5716
REGION IX (Zamboanga Peninsula)	3	100%	3362	HC	1941
REGION X (Northern Mindanao)	2	100%	6266	HC	4430
REGION XI (Davao Region)	1	100%	10000	HC	10000
REGION XII (Soccsksargen)	3	100%	4259	HC	2459
NATIONAL CAPITAL REGION (NCR)	11	50%	1561	MC	471
CORDILLERA ADMINISTRATIVE REGION (CAR)	1	100%	10000	HC	10000
REGION XIII (Caraga)	1	100%	10000	HC	10000
REGION IV-B (MIMAROPA)	1	100%	10000	HC	10000
BARMM		-			
National	48	67%	1983	HC	286

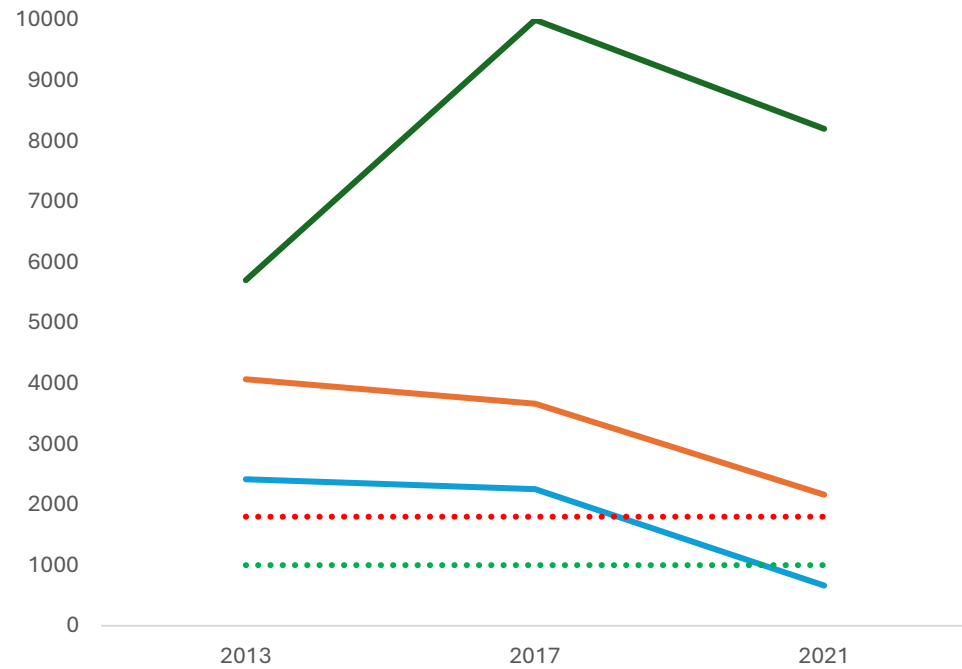
*Market type: U - Unconcentrated Market, MC - Moderately Concentrated Market, HC - Highly Concentrated Market

National Capital Region: HHI for 2013, 2017, and 2021

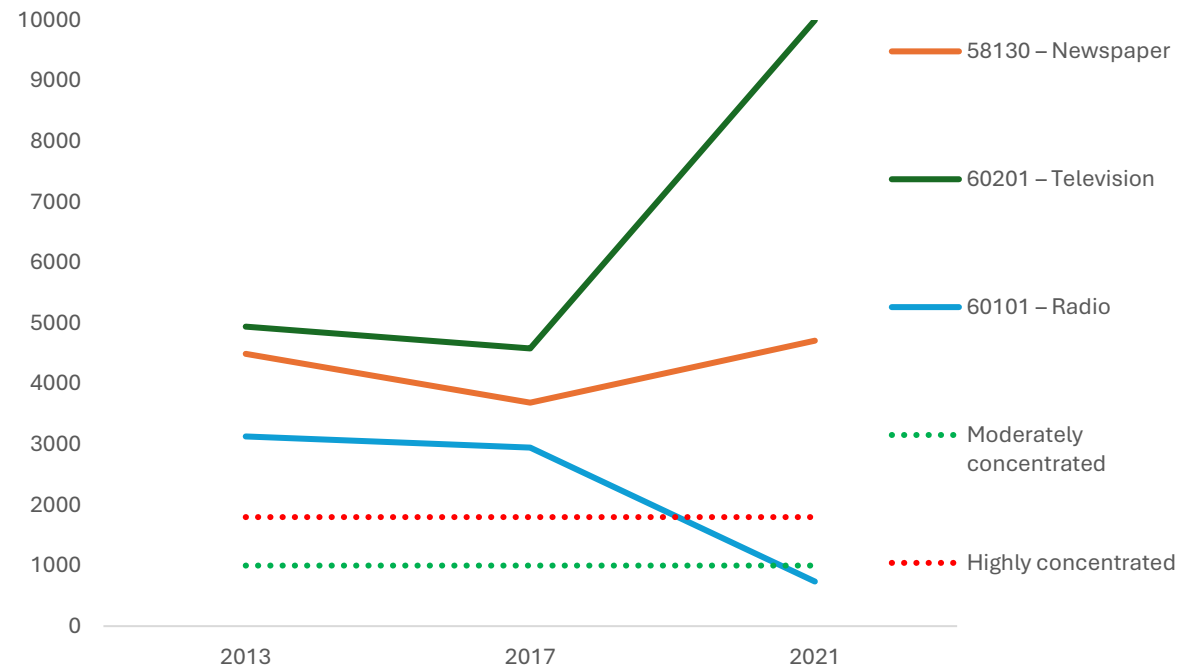


Other regions: HHI for 2013, 2017, and 2021

Region IV-A



Region XI



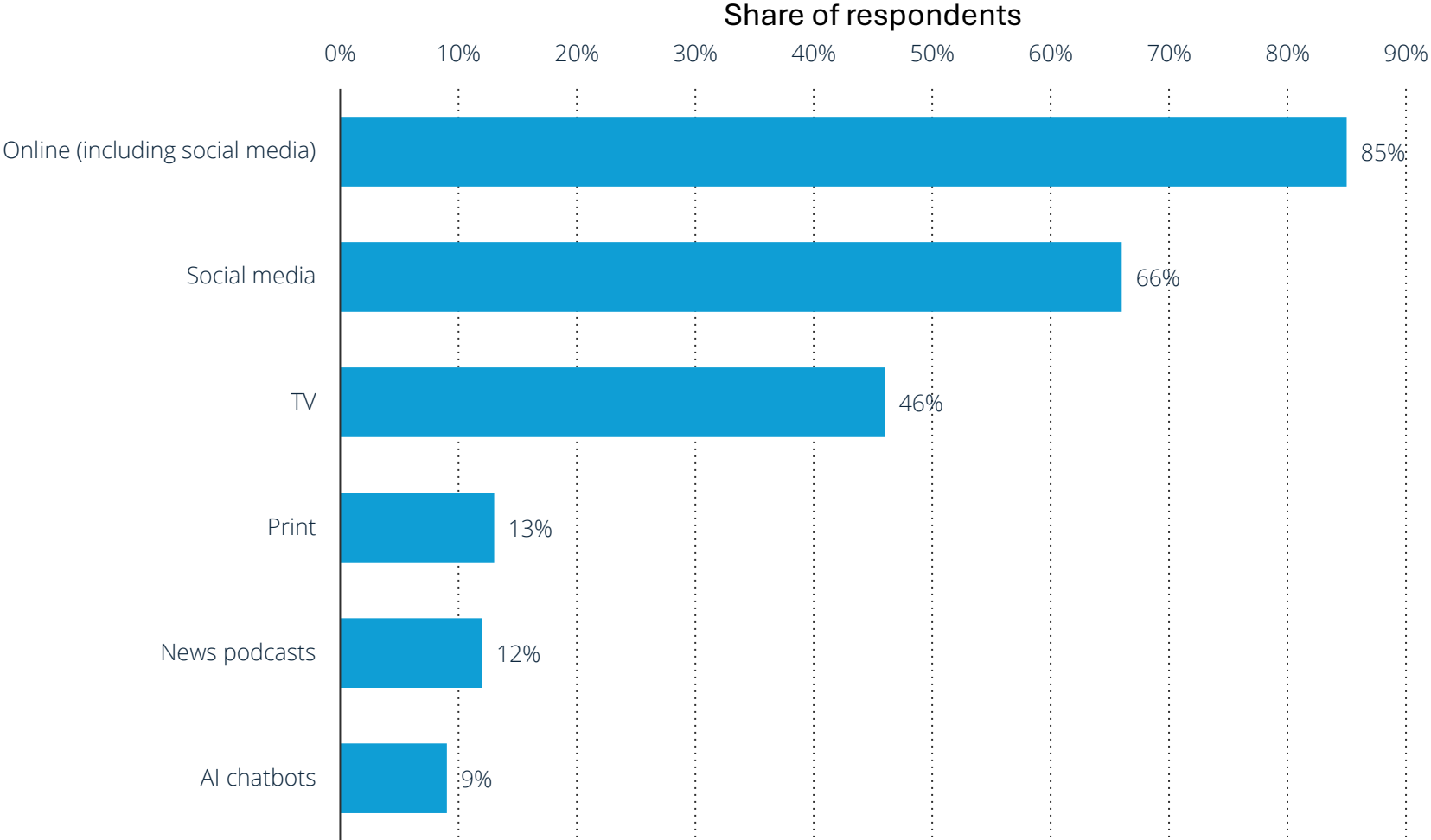
Challenges and the digital shift

Proportion of Population Aged 10 to 64 Years by Frequency of Exposure to Various Forms of Mass Media, Philippines: 2024 (in percent)

Forms of Mass Media	Exposure Rate	Frequency of Exposure				
		Every day	At least once a week	Seldom	Not at all	Not Applicable
I. READING PLATFORMS						
a. Newspaper (printed)	30.0	1.5	3.0	23.1	64.5	7.9
b. Newspaper (online/digital)*	52.1	7.9	8.9	32.1	44.8	6.4
c. Magazine (printed)	50.2	6.9	8.4	31.7	46.6	6.4
d. Posters (printed)	49.2	3.7	6.7	35.6	47.4	6.6
II. AUDIO/VISUAL PLATFORMS						
a. Television	82.3	35.4	14.2	30.2	17.1	3.1
b. Radio	52.9	9.4	8.5	32.1	44.5	5.6
c. Movies, Plays, and similar shows (cinema/dvd/vcd players)	58.2	7.6	11.0	36.5	39.5	5.4
d. Video Streaming*	66.5	19.1	13.4	30.6	31.8	5.1
e. Music Streaming*	63.5	16.5	12.8	31.0	34.7	5.0
III. INTERNET						
a. Internet for Work/Research	52.7	15.7	10.2	23.6	44.3	6.2
b. Internet for Social Media	80.5	50.5	10.2	16.8	18.8	3.7
c. Internet for E-commerce*	45.3	6.0	8.3	27.9	51.0	6.9
d. Internet for Government Services/Financial Transactions/ Online Banking*	37.0	3.8	6.1	24.3	58.0	7.9

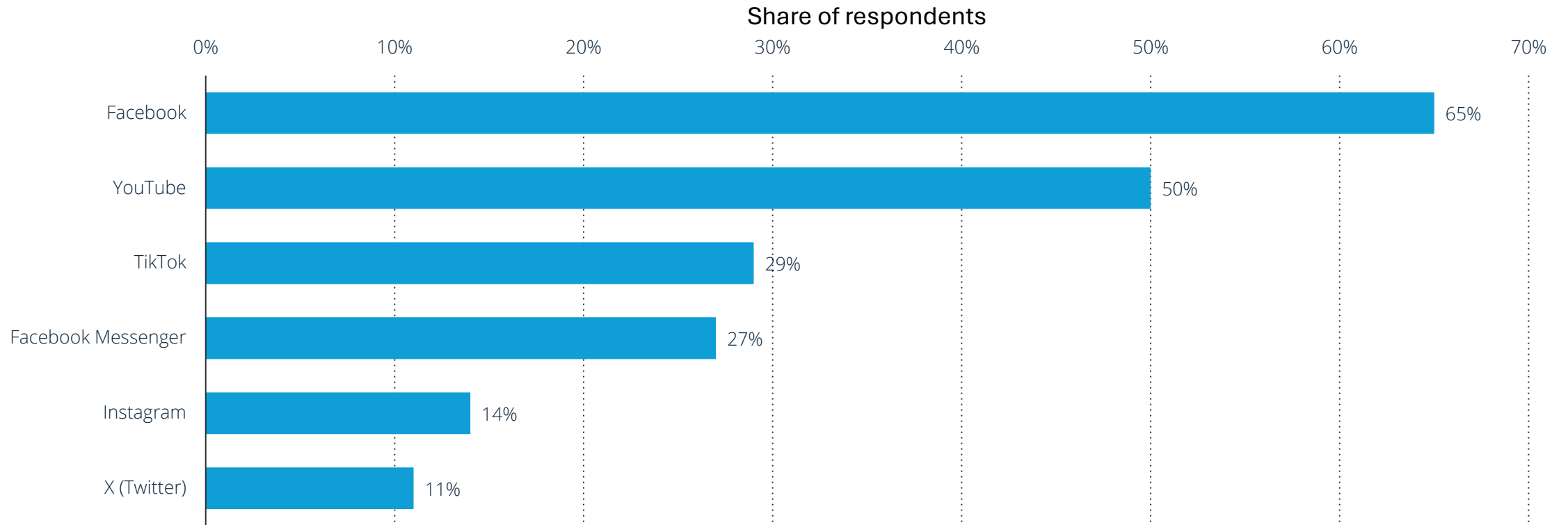
Source: 2024 Functional Literacy, Education and Mass Media Survey (PSA)

Sources of news in the Philippines in 2025, by channel



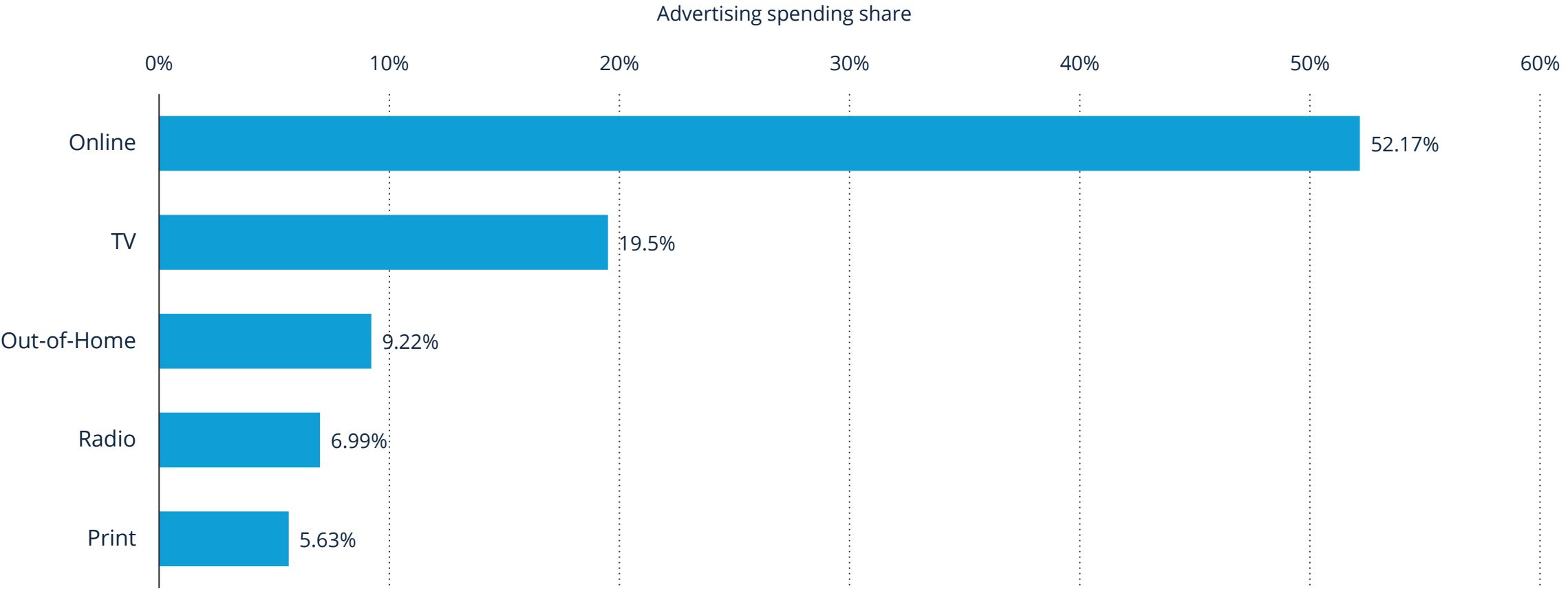
Source: Reuters Institute for the Study of Journalism (2025)

Leading social media and messaging platforms for consuming news in the Philippines in 2025



Source: Reuters Institute for the Study of Journalism (2025)

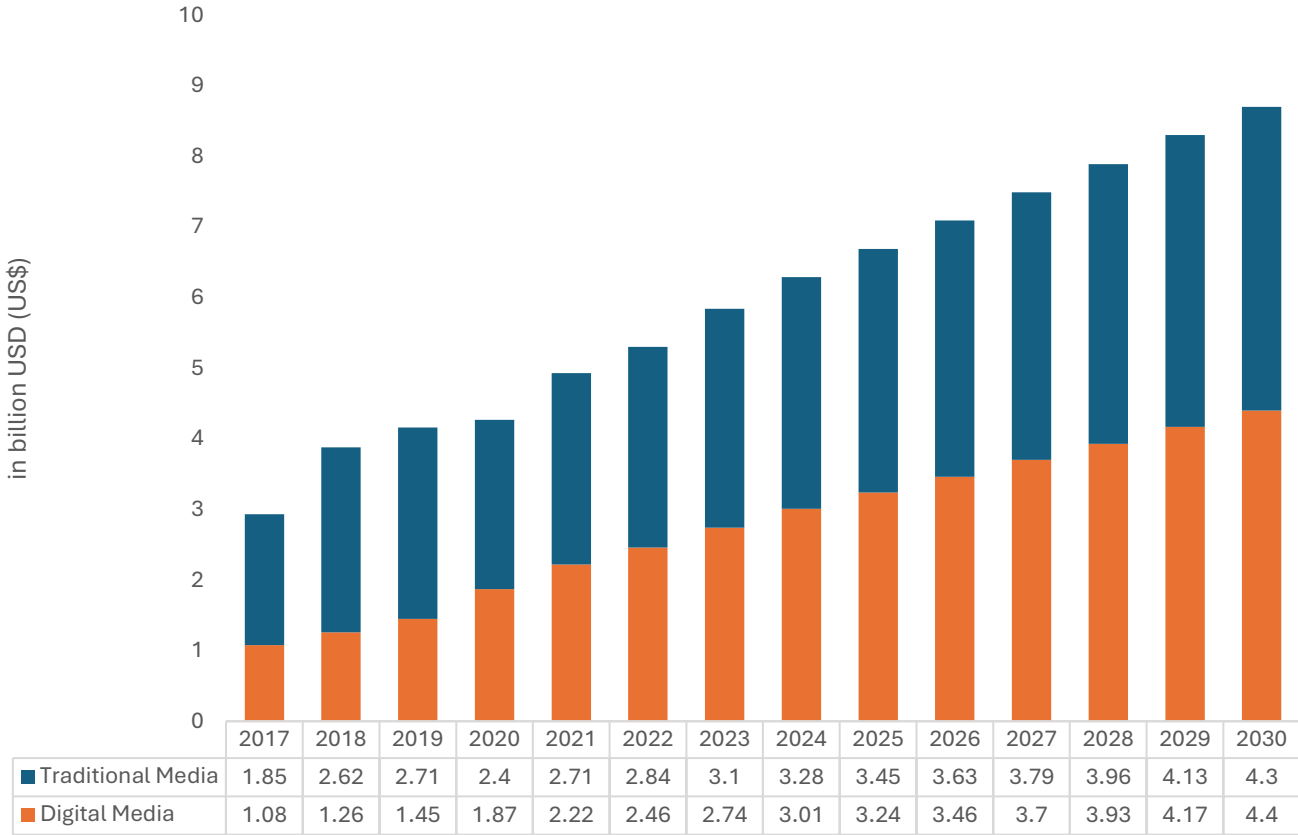
Distribution of advertising spending in the Philippines in 2023, by media



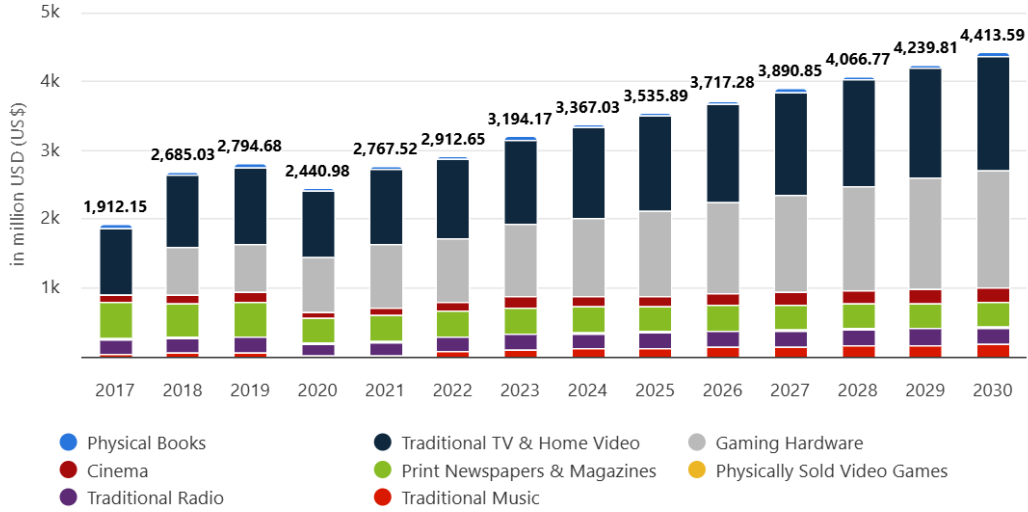
Source: Statista (2024)

Revenue of the media market in the Philippines

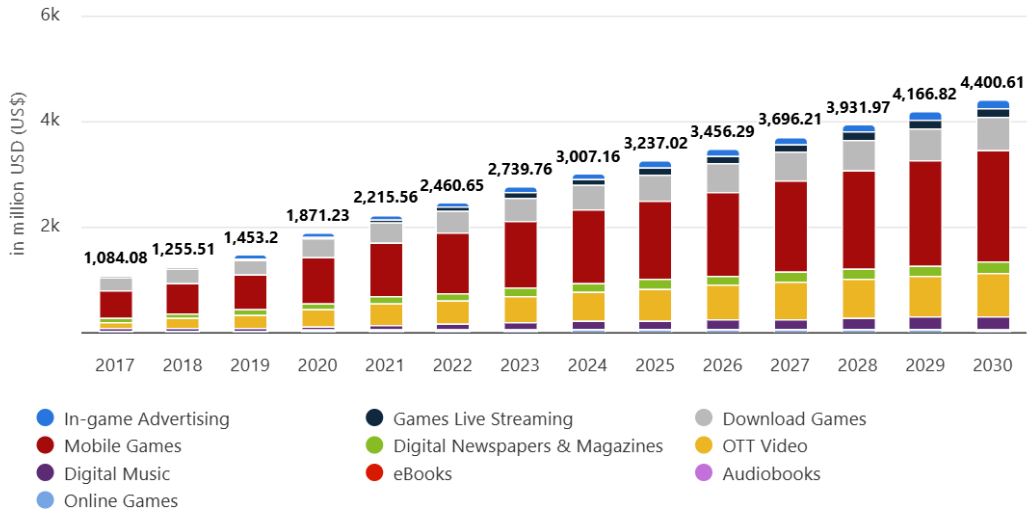
Media - Revenue Traditional & Digital



Media - Revenue Traditional



Media - Revenue Digital



Notes: Data was converted from local currencies using average exchange rates of the respective year.

Source: Statista Market Insights (2025)

Challenges & Opportunities (1/2)

Industry restructuring

- Consumers migrating to online platforms
- Print media crisis
- Legacy media's online presence



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Image sources: <https://corporate.abs-cbn.com/newsroom/news-releases/2020/7/31/kapamilya-online-live-youtube-facebook?lang=en>, <https://www.philstar.com/headlines/2024/02/02/2330448/media-public-good-closure-cnn-philippines-draws-concerns-un-expert>, <https://play.google.com/store/apps/details?id=com.newspaperdirect.manilatimes>, https://en.wikipedia.org/wiki/Baguio_Midland_Courier

Challenges & Opportunities (2/2)

Insights from industry

- Competition in the media sector
- Innovating business models
- Adapting to new technologies and AI
- Retaining advantages amidst digitalization
- Policy and regulatory challenges
- Government support
- Other concerns

Conclusion

Key findings

Private ownership dominates the Philippine media landscape. Many large media companies are owned by families, and a few are affiliated with religious institutions. The business interests of some companies extend beyond the media sector.

The radio broadcasting industry is generally less concentrated compared to news publishing and TV broadcasting. The diversity of voices is relatively higher in radio broadcasting as well.

Media sector is restructuring as digital platforms and AI intensify competition, pushing legacy media to strengthen their digital presence and emphasize their competitive advantage in producing diverse, reliable, and localized content grounded in journalistic integrity, transparency, and ethical standards.

Challenges include limited or delayed access to government and financial data, various regulations and restrictions, weak regulation of big tech, threats to personnel safety, and financial sustainability challenges – especially outside the national capital region.

Consumer preference is increasingly shifting towards digital media. By 2029, digital media is expected to surpass traditional media in revenues.

Recommendations for policy and research

3 Strategies (following Banerji et al. 2002):

- Remove barriers to entry and expansion
- Support media organizations to expand their reach, especially in poor and remote areas
- Strengthen the broader policy environment

Further research:

- Network analysis to map ownership linkages and collaboration among media firms
- Competition analysis in converged markets
- AI in the media industry (ongoing)



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