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1. Introduction

The Mexican media system is categorized as a political-clientelistic system, with limited pluralism and liberal aspirations and a high degree of concentration in the television and telecommunications sectors[1]. At present, its main characteristics include: notably low levels of newspaper circulation; regional and local atomization; the preeminence of opinion journalism over investigative journalism; the dominance of commercial multimedia media groups; and a close relationship with political entities at municipal, state and federal levels. This is down to the eternal temptation on the part of governments and political figureheads to use public service media for their own purposes.

The Mexican media system is not homogeneous and has significant differences at the regional-state and state-local levels[2]. These can be seen, for example, in the coverage of telecommunications and broadcasting, the pluralism of media sources, and the local dynamics of political and journalistic practices[3]. In addition, organized crime (mainly narco-trafficking) is affecting local media in various ways and, in particular, the work done by journalists[4]. In this sense, Mexico has been considered one of the most dangerous countries in which to practice journalism, with an alarming increase in the number of journalists murdered during the first two decades of the 21st century[5].

[1] Rodrigo Gomez. (2020). El rol del Estado en el Sistema de Medios Mexicano 2013-2018. Punto de partida para una agenda de investigación. *Comunicación y sociedad*, 17.

[2] In this regard, we have highlighted in another study the need to think about the media subsystems in Mexico, in order to understand the differences and complexities of the system as a whole. There is research that has suggested and begun to develop this idea. See Rubén Arnoldo González Macías, Luis García, Alejandra Toxtle, Sallie Hughes, Celia Del Palacio, & Josefina Buxadé. (2023). Panorama de los medios informativos en México: Una mirada a los subsistemas regionales. *Global Media Journal México*, 20(39), 89-109. <https://doi.org/10.29105/gmjmx20.39-508>; Salvador De León-Vázquez, & Alejandro García-Macías. (2022). Cinco tendencias subnacionales del desarrollo mediático en México. *Frontera Norte*, 34. <https://doi.org/10.33679/rfn.vii.2264>; Grisel Salazar. (2019). Strategic allies and the survival of critical media under repressive conditions: An empirical analysis of local Mexican press. *The International Journal of Press/Politics*, 24(3), 341-362.

[3] Juan Larrosa-Fuentes. (2015). Crítica al sistema legal de radiodifusión y telecomunicaciones desde una perspectiva local. *Medios de comunicación y derecho a la información en Jalisco*, 2014, ed. María Magdalena Sofía Paláu Cardona, Guadalajara, ITESO, pp 109-115.

[4] Rubén Arnoldo Gonzalez. (2021). Mexican journalism under siege. The impact of anti-press violence on reporters, newsrooms, and society. *Journalism Practice*, 15(3), 308-328.

[5] From January 2000 to September 2023, Article 19 has documented the murder of 161 journalists, possibly in connection with their work as journalists. See Article 19. (2024). *Periodistas asesinados en México; en posible relación con su labor periodista*. <https://articulo19.org/periodistasasesinados/#:~:text=De%202000%20a%20la%20fecha,anterior%20de%20Enrique%20Pe%C3%Bl%20Nieto>

Another characteristic of the Mexican media system is the dominance of television, as it has historically been a primary source of information and cultural consumption for Mexican audiences. In recent years this dominance has been waning due to the rise of digital media. According to the National Survey of Audiovisual Content Consumption (*Encuesta Nacional de Consumo de Contenidos Audiovisuales, ENCA*) 2022 of the Federal Telecommunications Institute (*Instituto Federal de las Telecomunicaciones, IFT*), 77% of those who own a TV set watch free-to-air channels and, on average, 2.5 hours of free-to-air television are watched per day; news and movies are watched most frequently. After television, radio is one of the most consumed media sources, according to the same IFT survey, which found that one out of every three Mexicans listens to radio for at least three hours a day. In addition, this study reports that the most popular types of programs are music (84%) and news (81%)[6].

As a result of these shifts in the media system, the distribution of advertising spending has changed significantly in the last ten years, after decades of dominance by television, which used to attract more than 50% of total ad expenditure nationwide (see *Figure 1.2*)[7]. According to the latest reports, television has already been displaced by the internet and now accounts for only a quarter of the advertising market (26%) - (see *Figures 1.2 and 1.3*). In addition, in 2016 a third television network was launched, Imagen Television[8], breaking the television duopoly that had dominated the Mexican media system from 1993 to 2015. As a result, Televisa and TV Azteca have since had to share the advertising pie with a third nationwide player.

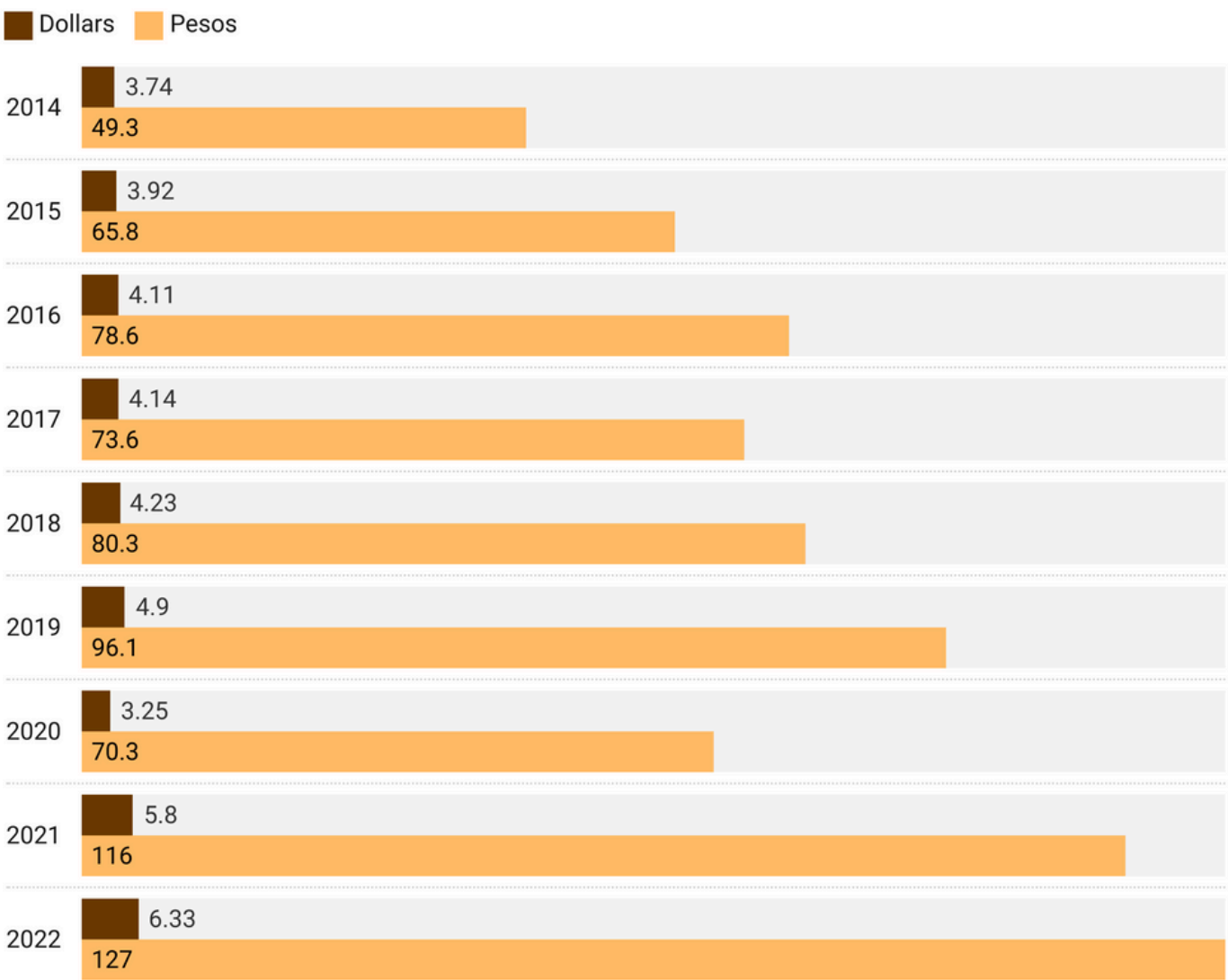
[6] Instituto Federal de Telecomunicaciones. (2022). Encuesta Nacional de Contenidos Audiovisuales México: IFT. https://somosaudiencias.ift.org.mx/archivos/01reportefinalencca2022_vpa.pdf

[7] Rodrigo Gómez & Chiara Sáez. (2022). Media Policies in Chile and Mexico. A Comparative Analysis in the Context of the Pacific Alliance (2012–2018). *International Communication Gazette*, 84(6), 467–485.

[8] This network emerged as part of the constitutional reform of 2013, which mandated the licensing of two new television networks nationwide. Only Grupo Imagen was licensed as the other bidder, Grupo Radio Centro did not comply with the payments required for licensing.

Figure 1.1: Advertising revenues in Mexico, 2014-2022

In billion



Source: Authors' own estimates based on data from Merca 2.0 and PCW • Created with Datawrapper

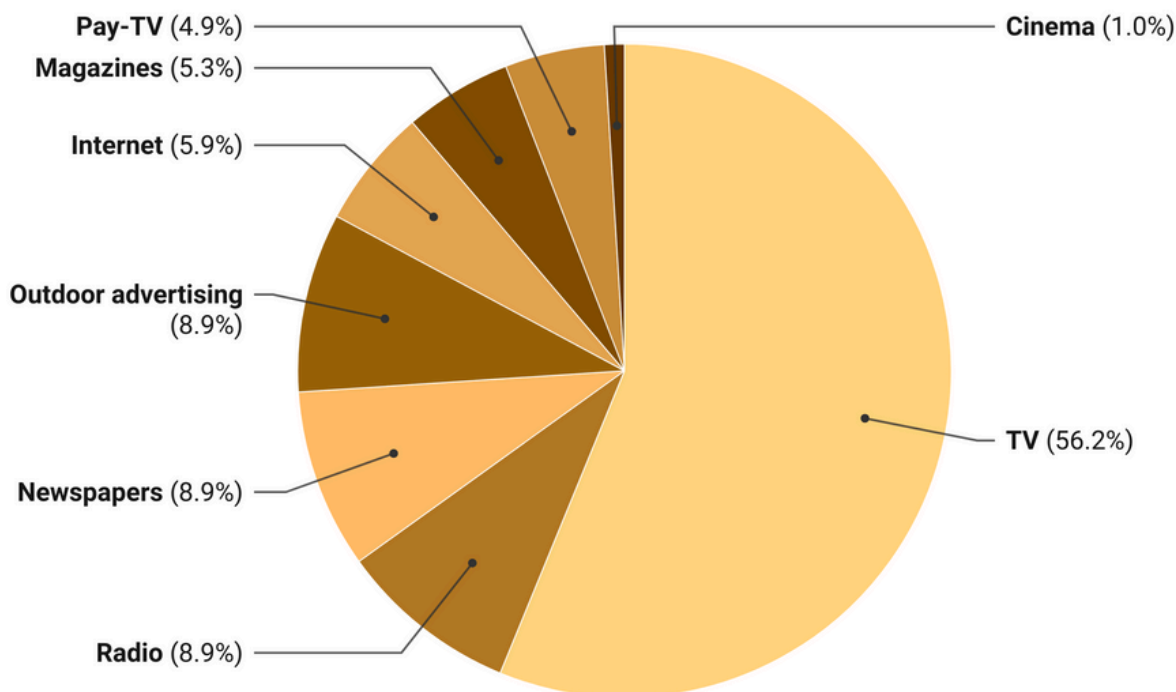
Online advertising is highly concentrated in the hands of two U.S.-based companies, Alphabet and Meta, which account for 82.4% of the market[9]. These two companies had an estimated advertising income of MXN 60.7bn (US\$ 3bn) in 2022, representing between them almost half of the entire advertising investment across all Mexican media.

[9] Dora Villanueva. Google y Meta acaparan el 82.4% de la publicidad digital en México. 15 November 2023. La Jornada. <https://www.jornada.com.mx/noticia/2023/11/15/economia/google-y-meta-acaparan-el-82-4-de-la-publicidad-digital-en-mexico-487>.

In view of this situation, which has an adverse impact on competition in the advertising market, the Federal Economic Competition Commission (*Comisión Federal de Competencia Económica, COFECE*), Mexico’s antitrust regulator, initiated an investigation from 2020–2023. It sued the U.S. company Google for anti-competitive practices in the digital advertising market, to the detriment of competitors and consumers. The procedure may conclude with the acquittal of the technological giant, the obligation to change its commercial practices, or with a fine of up to 8% of its total revenues of the previous year if any unlawful conduct is found. COFECE was to make a decision within a period not to exceed 120 business days starting on November 8, 2023[10]. A decision was yet to be made at the time of writing.

Questions remain as to how COFECE decided on that particular revenue percentage, and why the regulator only targeted Google with its suit.

Figure 1.2: Advertising spending by media segment in Mexico, 2010

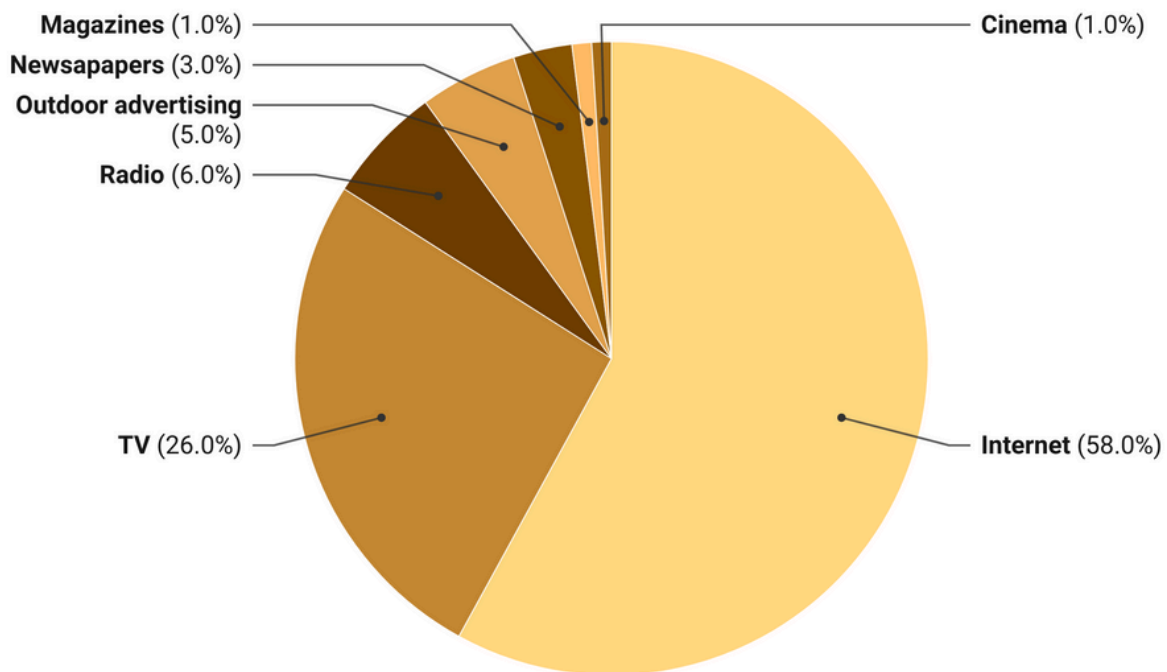


Source: Authors’ own estimates based on data from Merca 2.0, 2011 • Created with Datawrapper

[10] COFECE. (2023). Cofece emplaza a empresa por probables prácticas anticompetitivas en el mercado de servicios de publicidad digital. <https://www.cofece.mx/cofece-emplaza-a-empresa-por-probables-practicas-anticompetitivas-en-el-mercado-de-servicios-de-publicidad-digital/>

This shift in the advertising market has had a significant impact on the former television duopoly formed by Grupo Televisa and Televisión Azteca[11]. Televisa reported net losses of MXN 918.5m (US\$ 53.2m) in Q3 2023, due to the decline in subscribers of its pay-TV companies (IZZI and SKY). Its shares on the Mexican Stock Exchange (BMV) also registered their lowest historical value during that period. TV Azteca reported a financial debt of MXN 528m (US\$ 27m) at the end of 2022. In June 2023, BMV suspended the listing of its shares. The company’s subsidiary in the U.S., Azteca America, ceased to operate on December 31 2022, after 22 years of broadcasting. Likewise, local Mexican media (especially the written press) are in a precarious situation, and many local newspapers and television stations are beginning to disappear.

Figure 1.3: Advertising spending by media segment in Mexico, 2022



Source: Authors’ own estimates based on data from PWC, 2023 • Created with Datawrapper

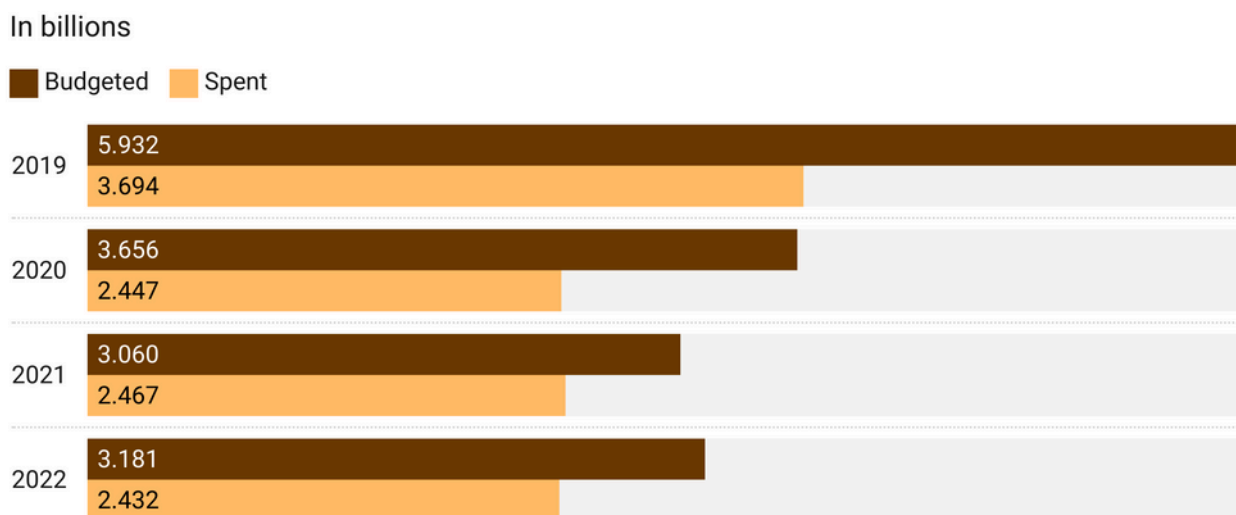
[11] For the past five years, Grupo Televisa’s main revenues and profits have come from its telecommunications businesses, particularly pay-TV.

The federal government, headed by Andrés Manuel López Obrador (AMLO), has significantly reduced the budget allocated to state advertising since 2019, which has greatly impacted the financial viability of the media sector.

In the previous six-year mandate, government spending on official state advertising was identified as one of the most important issues affecting Mexican media, due to its political-clientelistic nature[12]. There was a clear lack of regulation dictating how the spending should be allocated, and no precise objectives shown in the communication campaigns on which these funds were spent.

In fact, the AMLO manifesto committed itself to enacting a clear and transparent regulation on state advertising. However, this law never materialized, and methods of allocating public resources to the media have not improved under the current administration. Therefore, the tendency to benefit the privileged club of ten media operators, in which Televisa and TV Azteca continue to stand out, has been maintained. Since 2018, the government has underspent the allocated media budget with no accountability for the unspent money (see Figure 1.4)[13]. This situation contrasts with the previous administration of Enrique Peña Nieto (EPN), between 2013 and 2018, when overspending of state funds on advertising was rather common (see Figure 1.5).

Figure 1.4: State advertising expenditure in Mexico, 2019-2022



Source: Article 19 (2023) • Created with Datawrapper

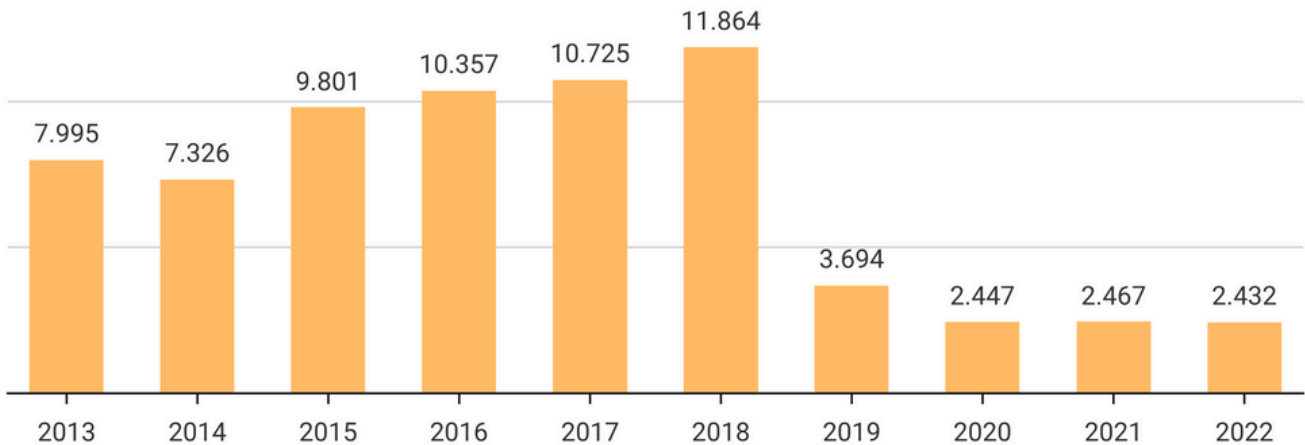
[12] Rubén Arnoldo Gonzalez Macias. (2015). Economically-driven partisanship—official advertising and political coverage in Mexico: The case of Morelia. *Journal of Latin American Communication Research*; Rubén Arnoldo Gonzalez Macias. (2017). Entre la espada y la pared: violencia y publicidad oficial como obstáculos para la modernización del periodismo mexicano. *Argumentos*, 30(85), 159-174; Martín Echeverría. (2017). Sesgo partidista en medios informativos. Una crítica metodológica y propuesta. *Comunicación y sociedad*, (30), 217-238

[13] Article 19. (2023). La publicidad oficial en 2022: menos gasto, misma opacidad. <https://articulo19.org/la-publicidad-oficial-en-2022-menos-gasto-misma-opacidad/>; Rodrigo Gómez. (2021). El Sistema de Medios Mexicano y la publicidad oficial en el contexto de la cuarta transformación; Julio Juárez. (Ed.) *Ensayos sobre comunicación gubernamental en la Cuarta Transformación ¿cambio o continuidad?* Ciudad de México: UNAM-CEIICH.

The AMLO administration broke the trend of excessive spending on state advertising, in contrast to the EPN government which spent around MXN 11bn (US\$ 560m) in its last year in office and MXN 62bn (US\$ 3.15bn) during its entire six-year term [14] (see Figure 1.5). In fact, one of AMLO’s electoral campaign proposals promised to cut state advertising expenses by 50% during the first year and to stabilize expenditure at one third of the amount spent during the last year of the EPN administration. This timeline was based on the intention not to affect the financial viability of media, especially radio and print.

Figure 1.5: State advertising expenditure in Mexico, 2013-2022

In billions



Source: Authors’ own estimates based on data from Article 19, Fundar and El Pais • Created with Datawrapper

Another aspect that is important to briefly highlight in this introduction is the state of public media in Mexico. After the 2013 constitutional reform on telecommunications, there was an expectation of media consolidation in terms of editorial independence, universal coverage, and an adequate budget allocation to offer quality informative, educational, and cultural content.

At the same time that the Federal Telecommunications and Broadcasting Law of 2014 was enacted, the Law of the Public Broadcasting System of the Mexican State was published. Therefore, the “Public Broadcasting System of the Mexican State”, (Sistema Público de Radiodifusión del Estado Mexicano, SPR) was created. The newly born independent entity was endowed with its own legal personality and assets, as well as full technical and operational decision-making autonomy.

[14] Rodrigo Gómez.(2021). El Sistema de Medios...cit.

SPR joined other federal public media, such as: Canal Once, of the National Polytechnic Institute (*Instituto Politécnico Nacional, IPN*); Canal 22, attached to the Ministry of Culture; the Mexican Radio Institute (*Instituto Mexicano de la Radio, IMER*); and Radio Educación, run by the Ministry of Culture, with the purpose of strengthening the public sector and enriching the country's media.

The so-called public media system in Mexico consists of channels belonging to the judiciary and Congress, as well as 28 state-level public media broadcasters, and as many university channels, in addition to the public media listed above. La Red México (formerly Red de Radiodifusoras y Televisoras Educativas y Culturales de México), which has 91 members, is the blanket name for this group[15].

Finally, with the implementation of the Federal Telecommunications and Broadcasting Law of 2014, a legal base was created for the third communication sector. Since then, individuals or organizations interested in operating non-profit communities and social media have had access to broadcasting licenses. Thus, one of the historical demands of civil society to democratize the Mexican media system was achieved[16]. Up to the first semester of 2023, the IFT has granted 493 broadcasting licenses (321 social, 145 community and 27 indigenous) and 25 telecommunications licenses (21 social and 4 indigenous). However, there is still a big gap in relation to community media outlets, which continue to struggle to operate. Above all, much more accurate and focused public policies are needed to guarantee their financial sustainability and vital updates to infrastructure. These are necessary for exercising and enabling the rights of freedom of expression, access to information, communication and self-determination in the third sector, in addition to reflecting the linguistic plurality, cultural diversity and different lived realities of the Mexican Republic[17].

[15] La Red. (2024). <https://www.redmexico.org.mx/>

[16] Rodrigo Gómez. (2018). The Mexican third sector of the media: The long run to democratise the Mexican communication system. *tripleC: Communication, Capitalism & Critique. Open Access Journal for a Global Sustainable Information Society*, 16(1), 332-352.

[17] In this regard, AMARC and Observacom worked on a document entitled "The economic sustainability of community and indigenous radio broadcasting. Scope and limits of the Federal Law of Telecommunications and Broadcasting." This text presented guidelines for the implementation of public policies to support the sustainability of community media from a multidimensional approach. We also highlight that in 2020, at the initiative of the Mexican government and UNESCO, the Country Team was set up to develop a project to strengthen community and indigenous radio stations in Mexico. After several months of work, the document was presented in 2022. For more information, we recommend consulting the following UNESCO page: <https://es.unesco.org/mediosindigenasycomunitarios>.

In conclusion, the Mexican media system is in a period of significant change, since the entry of new players, such as digital platforms led by social media and subscription video on demand services, are affecting its logic and dynamics at an economic level. This requires adjustments to be made to the traditional business model. This has been impacting both large Mexican multimedia groups and medium-sized and smaller media companies. However, as has happened in other countries, the problem is self-inflicted. In the Mexican case, it is the result of decades of high market concentration protected by political power, a lack of innovation and production of quality content, as well as hyper-commercialization and the predominance of corporate values over journalistic ethics[18].

At the same time, the interaction of these transformations with political events, such as the alternation of power, is generating palpable modifications in media practices. This context of dynamic and, at times, chaotic change has given rise to evident tensions between the exercise of press freedom, the emergence of a pluralistic but polarized press, and the growing eruption of disinformation campaigns. All together, these elements have had a notable effect on public trust in journalistic media.



[18] Dwayne Winseck. (2022). The Broken Internet and Platform Regulation: Promises and Perils. Terry Flew and Fiona Martin (eds.) Digital Platform Regulation: Global Perspectives on Internet Governance. Palgrave, 229-256.

2. Media consumption patterns

In Mexico, cultural and information consumption has been changing very fast, experiencing a significant acceleration driven by the digitization that unfolded during the Covid-19 pandemic. However, due to structural issues and ingrained cultural practices, the changes experienced in Mexico have been slower compared to other countries and regions. For example, television has maintained its prominent position in relation to news and entertainment consumption. According to ENCA of the IFT, for the year 2022, 94% of Mexican households own a TV set, of which 54% only have free-to-air television and mostly watch news shows (64%), movies (45%), educational programmes (35%), telenovelas (22%), cartoons (20%), sports (12%), and series (9%), among other programs. Another striking fact is that, of the 46% who answered that they have pay-TV, 68% also said that they watch free-to-air TV channels via this platform.

Similarly, the ENCA shows that the device most used to watch content on the internet is the mobile phone (89%), which illustrates the multi-screen and atomized consumption of both news and entertainment. In this sense, the same survey reports that the most consumed content on the internet consists of: movies (52%), series (42%), educational content (40%), tutorials (24%), music videos (17%), documentaries (13%), news (8%), cartoons (8%), comedy videos (7%) and sports (4%).

This data from IFT's ENCA shows that Mexicans prefer to be informed through television broadcasts, while their consumption of movies and series is migrating or being complemented by handheld devices. Thus, fiction consumption is increasingly oriented to an individual and atomized experience, while news consumption still takes place on the common screen: TV.

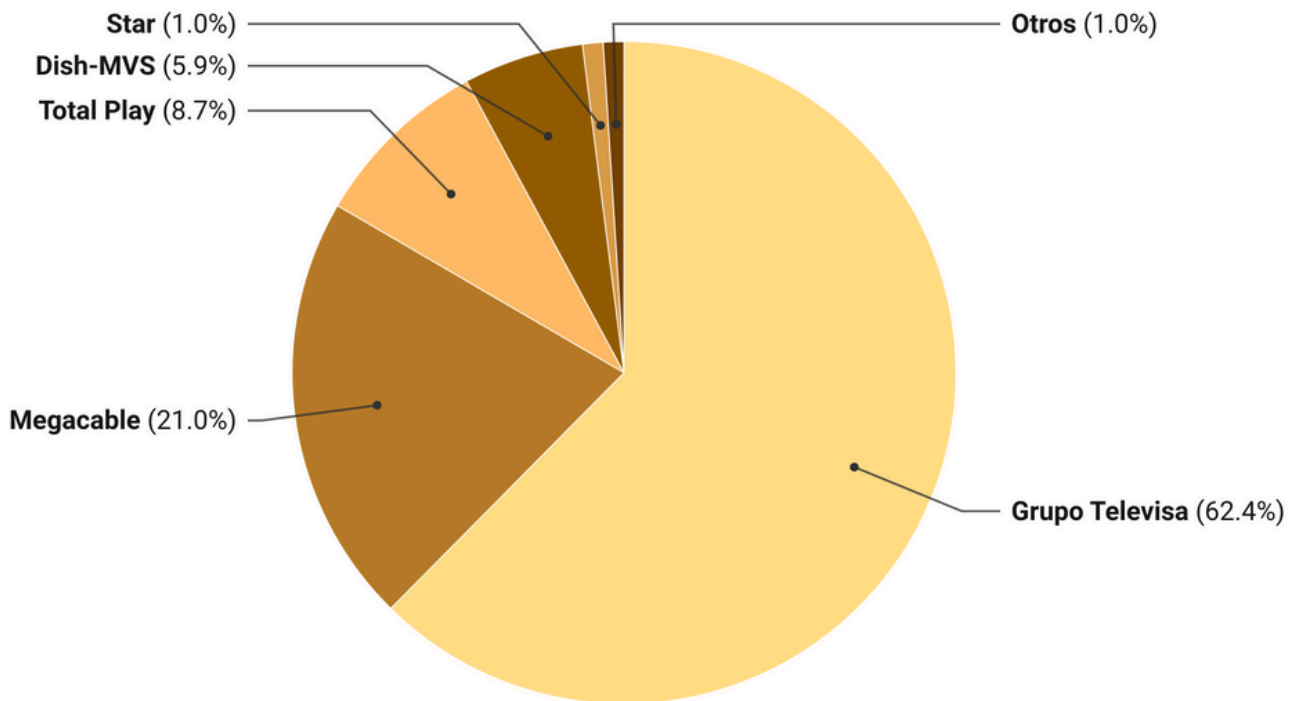
At the end of 2022, pay-TV had a household penetration of 58% in Mexico, which has been decreasing since 2018 due to the arrival of subscription video-on-demand (SVOD) platforms. Nevertheless, pay-TV continues to be important in Mexico because it offers a large number of local, regional and international news channels.

Pay-TV in Mexico is supported by satellite technologies such as DTH (Direct-to-Home), cable, and IPTV (Internet Protocol Television). Of the total number of pay-TV subscribers, 49% use cable, 42.3% use DTH, and the remaining 8.8% use IPTV.

This market presents a consolidated structure among five players: Grupo Televisa, Megacable, Totalplay, Dish-MVS and StarGroup, but with a high concentration by Grupo Televisa (GT) that attracts 62.4% of subscribers. In fact, in 2020, the IFT declared GT to have substantial power in 35 relevant markets; however, GT appealed and won before a specialized court in telecommunications and broadcasting matters. The court ruled to dismiss the IFT’s initial finding and ordered it to perform a new prospective analysis considering the context of new market trends and other consumption patterns of restricted audio and video services, as well as the effects of on-demand content provider platforms[19].

In short, pay TV is expected to decline, due to new audiovisual consumption and competition, such as subscription video on demand (SVOD), transactional video on demand (TVOD), ad-supported video on demand (AVOD), and free ad-supported streaming television applications (FAST).

Figure 2.1: Pay-TV market share in Mexico, 2021



Source: Authors’ own estimates based on data from IFT 2023, p.28 • Created with Datawrapper

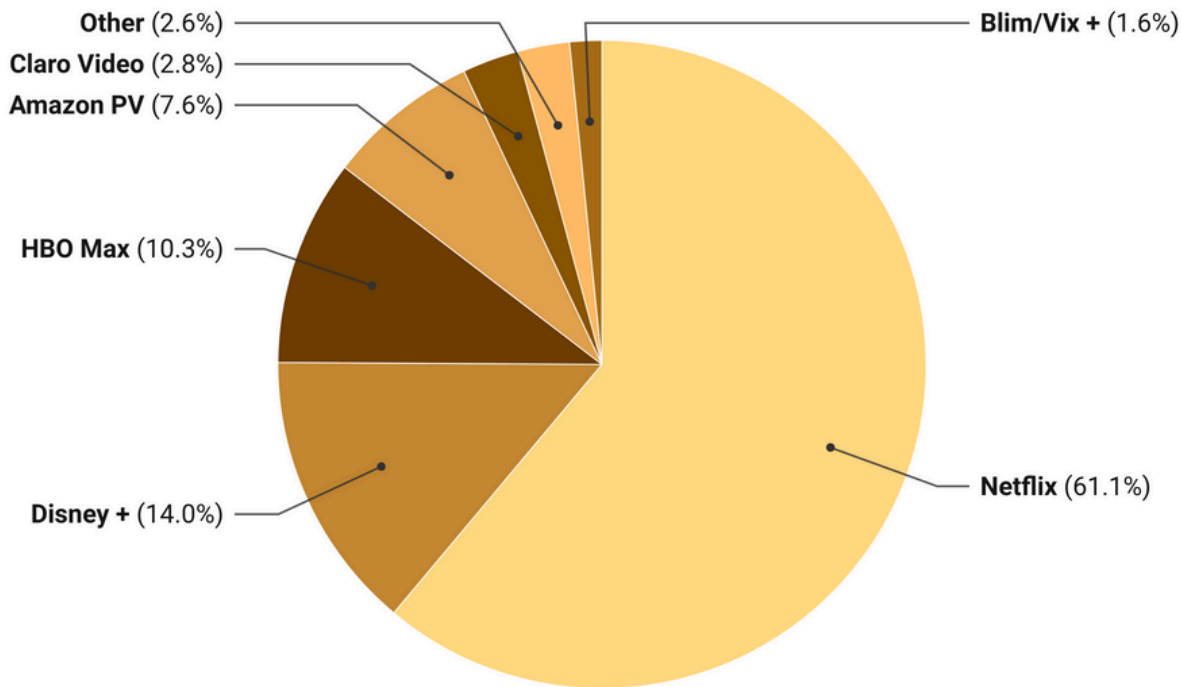
[19] Expansión. (2022). Televisa obtiene la invalidación de la declaratoria de poder sustancial. <https://expansion.mx/empresas/2022/10/26/televisa-obtiene-la-invalidacion-de-la-declaratoria-de-poder-sustancial>.

In this sense, it is important to mention the growth of SVOD services in the Mexican cultural media consumption, to have a complete map of both audiovisual cultural consumption and the different content providers. These services, although they do not have news programs, do offer a solid catalog of documentaries which review historical, political, economic and cultural aspects of society.

The dominant SVOD companies in Mexico are Netflix, Disney+ (including Star+ [20]), HBO Max, Amazon Prime Video, Paramount+, ClaroVideo, and Vix+ (formerly Blim). At the end of 2022, there were 12.6 million subscribers to an SVOD company in the country, which is equivalent to around 56 million Mexicans having access to a video portal of original content[21].

According to The Competitive Intelligence Unit (CIU), the SVOD market is dominated by Netflix, with more than 60% of subscribers, followed by Disney+, Amazon Prime Video, HBO Max, and the Mexican platforms Claro video and BlimTv/Vix+.

Figure 2.2: Market share of SVOD companies in Mexico, 2022



Source: Authors' own estimates based on data from: Camargo, R (2022) "Mercado de contenidos por suscripción al 2T-2022: Crecimiento y preferencia de plataformas" • Created with Datawrapper

[20] In Mexico, the Disney Company offers two SVODs, the best known being Disney+ and the second Star+, which offers adult content from 20th Century Studios, ABC, Hulu and ESPN's live sports.

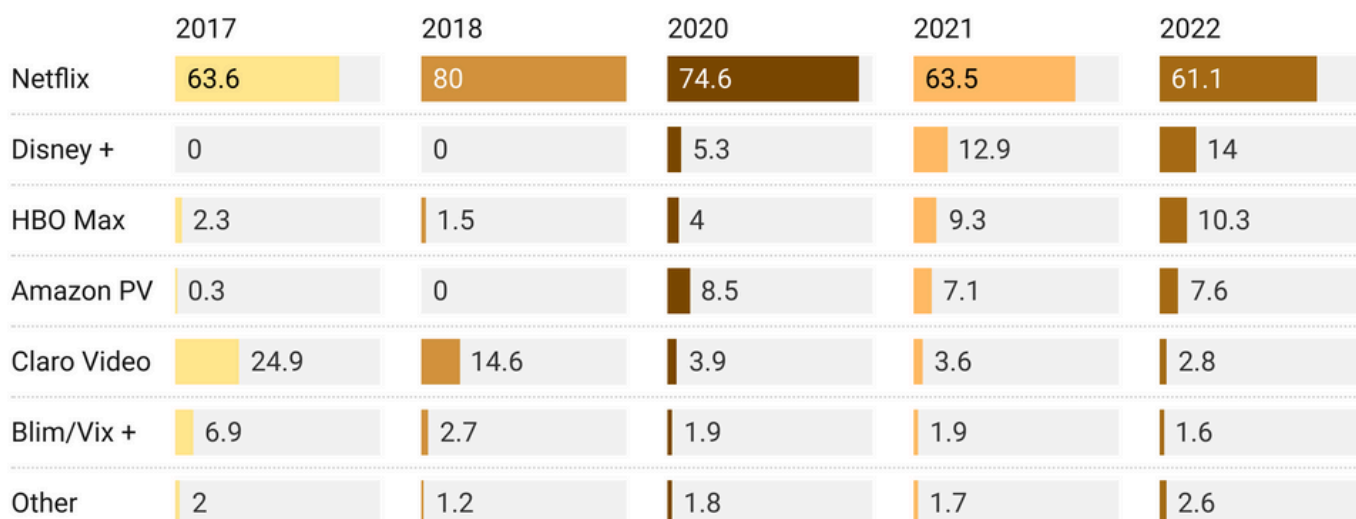
[21] Ernesto Piedras. SVOD en México: Competencia y Nueva Estrategia Tarifaria. 20 October 2022. El Economista. www.eleconomista.com.mx/opinion/SVOD-en-Mexico-Competencia-y-Nueva-Estrategia-Tarifaria-20221019-0170.html.

Netflix's market share has been declining significantly in percentage points since 2020 (see Figure 2.2), since new players entered the Mexican market, but its subscriber base has not decreased. The explanation is that, according to a study by CIU, 44% of subscribers to these services say they subscribe to more than one SVOD service. However, another study reveals that six out of 10 SVOD users are not account holders, i.e. they use a shared account[22].

The Mexican SVOD market has not been regulated so far. For obvious reasons, U.S. technology giants, led by Netflix, are lobbying to keep this situation going for as long as possible.

Moreover, the Mexican SVOD market is dominated by U.S. companies. The two Mexican companies have seen their shares in this market diminish, especially Claro Video of América Móvil. For its part, Televisa, after the merger with Univision and the launch of its Vix platform, aspires to compete in this new battle. Televisa's strategy is anchored mainly in the exclusive offering of sports events such as Mexican soccer and the Mexican national soccer team. Likewise, its extensive and historic catalog of original content is its main strategy to win subscribers, not only in Mexico, but in all Spanish-speaking countries.

Figure 2.3: Market share of SVOD companies in Mexico, 2017-2022



Source: Authors' own estimates based on data from CIU 2017, 2018, 2020, 2021, 2022 • Created with Datawrapper

[22] Radamés Camargo. Hábitos de contratación de plataformas de video bajo demanda por suscripción (SVOD) en México. 24 October 2022. The CIU. <https://www.theciu.com/publicaciones-2/2022/10/24/hbitos-de-contratacin-de-plataformas-de-video-bajo-demanda-por-suscripcin-svod-en-mxico>

In terms of news consumption, as mentioned above, television is the main source of information for Mexican audiences, and nationwide networks have the highest viewer count. In this genre, the prime-time nightly newscasts of Televisa, TV Azteca and Imagen Televisión stand out. Likewise, we highlight the free-to-air all-news channels, where we identify Televisa’s Foro TV, TV Azteca’s ADN 40, and Grupo Imagen’s Excelsior TV. In addition, Milenio TV, Telefórmula, and CNN en Español are pay-TV channels that broadcast nonstop news in Spanish.

There are some nationwide radio stations broadcasting news programs with considerable audience ratings. Here, the morning and midday news programs stand out, since these are the peak times for driving. We have identified the following as the most important networks in this area: Radio Fórmula, W Radio, Stereo Cien, La Octava (Radio Centro), MVS Noticias, Imagen Radio, 88.9 Noticias, Radio Educación, and El Heraldo Radio.

Data provided by the National Directorate for News Media (Directorio Nacional de Medios Informativos, DNMI), following the findings of the Consorcio de Investigación para México of the World Journalism study, show an unprecedented number of 2,510 different news media in Mexico, of which around 45% are digital[23].

Table 2.1: Regional media concentration

Region	Number of media outlets	Share (%)
Northwest	292	12
Northeast	406	16
West	527	21
Central	579	23
Southeast	709	28
Total	2,510	100

Source: González, R., et.al (2023, p. 100) • Created with Datawrapper

[23] Rubén Arnoldo González Macías et al. (2023).Panorama de los medios informativos..., cit.

The media subsystems in Mexico are moving towards digital media, which are dominant in all regions. The Western region, composed of eight states (Aguascalientes, Colima, Guanajuato, Jalisco, Michoacán, Nayarit, Querétaro, and Zacatecas) stands out, concentrating around 60% of the news media. On the other hand, the Northwest region consisting of Baja California, Baja California Sur, Chihuahua, Sinaloa, and Sonora, has the lowest percentage of digital media with 33.9%, according to data from the DNMI[24].

These two regions (in socioeconomic terms) are among the richest regions of the country, and one might think that they are similar in some socio-cultural and political aspects. However, their news media ecologies are different; it must also be said that the Northwest region is the least populated and is the largest in Mexico. On the other hand, regarding similarities, both regions have the lowest percentage of printed newspapers.

The regions that account for the highest number of print newspapers are the Central zone, consisting of Mexico City, State of Mexico, Guerrero, Hidalgo, Morelos, Puebla. and Tlaxcala; and the Northeast, consisting of Coahuila, Durango, Nuevo Leon, San Luis Potosi. and Tamaulipas. This situation could be attributed to the economic and political relevance of Mexico City and Monterrey and their regional influence, according to the DNMI.

The Southeast zone, consisting of Campeche, Chiapas, Oaxaca, Quintana Roo, Tabasco, Veracruz, and Yucatan, is the least socioeconomically developed region of the country, concentrating the largest number of media, a total of 706 outlets. Here, the states that stand out are Veracruz (180) and Oaxaca (141), the former being the state with the largest number of media at national level and the latter the fourth-largest[25].

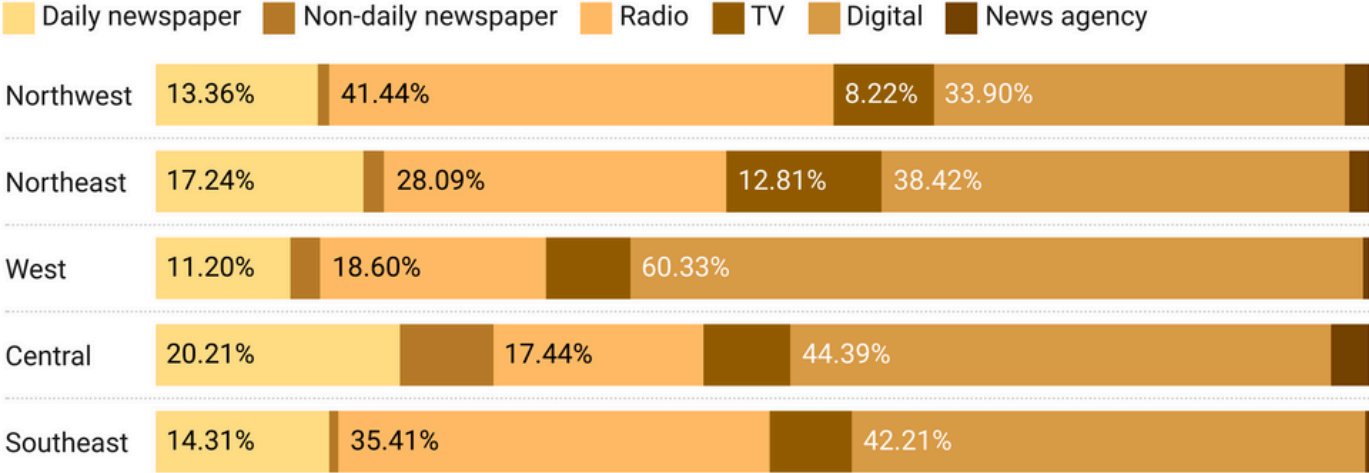
Another significant characteristic of the Mexican media system is its centralization, since Mexico City (162) and the State of Mexico (125) together account for around 11.5% of the country's media. They are followed by Tamaulipas (157), a less developed state than the aforementioned, which surprisingly ranks third. The states with the lowest concentration of media are those with the lowest population, with the exception of Sinaloa[26].

[24] Rubén Arnoldo González Macías et al. (2023). Panorama de los medios informativos..., cit., p. 100.

[25] Rubén Arnoldo González Macías et al. (2023). Panorama de los medios informativos..., cit., p. 102.

[26] Rubén Arnoldo González Macías et al. (2023). Panorama de los medios informativos..., cit., p. 101.

Figure 2.4: Distribution of media types by region in Mexico, 2023



Source: Authors’ own estimates based on data from González, R., et.al (2023, p. 100) • Created with Datawrapper

When it comes to trust in the media, the news programs of free-to-air television channels Televisa and TV Azteca, which reportedly boast the largest audiences in Mexico, appear at the bottom of a list ranking the level of public trust (see Table 2.2). The third largest free-to-air television network, Imagen Televisión, which started broadcasting in 2018, ranks higher in public trust than Noticieros Televisa and TV Azteca Noticias, a sign of erosion of confidence in historical TV stations and improved perception of newly emerging media channels.

CNN’s Spanish-language news channel, available on pay-TV platforms, has topped this list every year since 2020, while Aristegui Noticias, a program broadcast online and on the radio, which led the level of trust in 2018 and 2019, has dropped considerably since 2020. In May of that year, radio listeners sent an open letter to the journalist Carmen Aristegui, the program producer, requesting greater plurality in her radio program[27], following a series of constant critical remarks made by President Andrés Manuel López Obrador about Aristegui’s editorial agenda. This is believed to have had a negative impact on the trust of her audiences. The loss of trust is exacerbated by increased competition from a growing offering of left-wing online news programs, such as Sin Embargo, Contralínea and Astillero Informa, to mention just a few.

[27] Aristegui Noticias. (2020), Carta Abierta a Carmen Aristegui. <https://aristeguinoticias.com/2005/mexico/carta-abierta-a-carmen-aristegui-documento/>

In general, print media seems to be more trustworthy than television, radio and online media in Mexico. Nevertheless, the newspaper Reforma has experienced a decline in trust after President López Obrador openly criticized the publication in his morning conferences, for lacking rigor and acting as an opposition medium to his government.

Finally, only one radio station, Radio Fórmula, and one public television media outlet, Channel 22, appear in the trust ranking, which is otherwise dominated by print media outlets and digital media. The ranking does not include any newspapers closer to the political left, or with an editorial agenda focused on social justice such as La Jornada.

Table 2.2: Ranking of Mexican media by public trust, 2018-2023

Peach: Free-to-air television; Crimson: Pay-TV; Green: Daily print media; Orange: Radio; Blu: Digital Note: Aristegui is a combination of digital y radio.

	2018	2019	2020	2021	2022	2023
1	Aristegui	Aristegui	CNN	CNN	CNN	CNN
2	El Universal	El Financiero	Aristegui	El Universal	Milenio noticias	El Universal
3	El Financiero	El Universal	El Universal	Milenio noticias	El Universal	El Financiero
4	El Economista	El Economista	Milenio noticias	Imagen Noticias	Imagen Noticias	Milenio noticias
5	Reforma	Canal 22	Imagen Noticias	El Financiero	El Financiero	Imagen Noticias
6	Canal 22	Radio Fórmula	El Financiero	Radio Fórmula	El Economista	Radio Fórmula
7	Radio Fórmula	Imagen Noticias	Canal 22	El Economista	Radio Fórmula	El Economista
8	Imagen Noticias	Reforma	Radio Fórmula	Canal 22	Reforma	Aristegui
9	UnoTV	UnoTV	Reforma	Aristegui	Canal 22	Canal 22
10	SinEmbargo	TV Azteca Noticias	UnoTV	Reforma	Aristegui	Reforma
11	TV Azteca Noticias	SinEmbargo	TV Azteca Noticias	UnoTV	UnoTV	UnoTV
12	Noticieros Televisa	Noticieros Televisa	Diario Local	Diario Local	Diario Local	Diario Local
13	No report	No report	Animal Político	Animal Político	TV Azteca Noticias	TV Azteca Noticias
14	No report	No report	Yahoo!	TV Azteca Noticias	Animal Político	Noticieros Televisa
15	No report	No report	Noticieros Televisa	Noticieros Televisa	Noticieros Televisa	Latinus

Source: Authors' own estimates based on data from Reuters Institute Oxford, Digital News Reports 2018, 2019, 2020, 2021, 2022, 2023, project funded by Google • Created with Datawrapper

According to the Digital News Report: Mexico, a research project financed by Google, social media remains the main source of news for internet users in Mexico. The report also shows that trust in news has generally been declining in Mexico: from 49% in 2018 to 36% in 2023[28]. It also found a increased use of the main social media and messaging applications for news consumption, with Facebook (56%), YouTube (39%), and WhatsApp (30%) being the most used, followed by TikTok (15%), X (formerly Twitter) with 15%, and Instagram (14%)[29]. However, it's important to note that the news curated and disseminated by social media is mostly generated by nationwide and local media.



[28] María Elena Gutiérrez-Rentería. (2023). México, en Digital News Report 2023. Reuters Institute, University of Oxford. p.121. https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2023-06/Digital_News_Report_2023.pdf

[29] María Elena Gutiérrez-Rentería. (2023). México...cit.

3. Main players

The Mexican media system is dominated by a clutch of media conglomerates, which operate several media outlets and, in some cases, telecommunications networks, as is the case of Grupo Televisa and Grupo Salinas, owner of Televisión Azteca. Telmex/América Móvil is prohibited, through its license conditions, from operating free-to-air television channels or pay-TV chains in Mexico[30]. In spite of those limits, thanks to an agreement with Grupo Multimedios, the group operates some pay-TV channels such as Claro Sports and its news portal, UnoTV, aired online and on MVS TV, a channel available on free-to-air television in several cities. This agreement also makes it available on digital channels. These three groups are the main players on the market, with a long history that includes some ventures, at different times, into the United States and other Latin American markets.

Telmex/América Móvil and Grupo Televisa stand out in terms of coverage, as the former operates in 17 countries in the Americas, being the leader in fixed and mobile telecommunications and in the pay-TV sector in several of these countries. Its best-known corporate identity in South America is Claro. In addition, through its subsidiary Telekom Austria Group, it operates in eight European countries. Thus, Telmex/América Móvil is a regional player with networks that have transnational reach, and which belongs to Grupo Carso, headed by billionaire Carlos Slim Helú.

Grupo Televisa has historically stood out as the most important television group and content producer in Mexico. Currently, following its merger with Univision, the TelevisaUnivision conglomerate intends to consolidate its dominance in Spanish-language content in both the United States and Latin America through its VIX+ platform, which offers SVOD and AVOD packages. Grupo Televisa also operates telecommunications networks in Mexico and competes with Telmex in the home broadband and fixed-line telephone service market. It is also the leading company on the pay-TV market through its companies IZZI (cable) and SKY (DTH).

[30] Gabriel Sosa. (2017). América Móvil. In Birkinbine, Gómez & Wasko (eds.) *Global Media Giants* (pp. 125-143). Routledge.

Grupo Televisa's role in journalism has been controversial, since it established a monopoly on the market in 1970 that lasted until 2000, the year when the Institutional Revolutionary Party (Partido Revolucionario Institucional, PRI) lost the Mexican presidency. The broadcaster was said to serve the interests of the PRI government, especially through the editorial coverage of its flagship news programs on Canal de las Estrellas (Channel 2). However, in other newscasts run by the chain, for example on secondary channels and outside the prime time slots, some voices critical of the government were given space. This was either an attempt to reach wider audiences and promote editorial pluralism, or to whitewash its subordination to political power.

The death of Emilio "El Tigre" Azcárraga Milmo in 1997, father of the current owner of the group, led to a 180-degree turn in Televisa's corporate culture and collusion with the PRI-led government, in line with the democratic changes that year in Mexico[31].

Since it started operating in 1993, TV Azteca has been generally characterized by yellow journalism with a conservative and pro-business editorial line[32]. The broadcaster's newscasts are titled "Hechos" (Facts). A particular standout is the newscast "Hechos Noche" (Night Facts), hosted by Javier Alatorre, an anchorman who has been at the helm since the beginning of its broadcasting.

Grupo Imagen, MVS Comunicaciones, Grupo Multimedios and Grupo Radio Centro have also established an important presence, owning several media outlets at a regional and, in some cases, national level. Only two of the main media groups in the country have their headquarters outside Mexico City: Multimedios and Megacable, based in Monterrey and Guadalajara respectively.

Both Televisa and Azteca have local news programs produced or aired through their subsidiaries and re-broadcasters in the country's largest cities, including Guadalajara, Monterrey, Veracruz, Puebla, and Morelia, which also helps them shape the news agenda at state and local levels.

Grupo Imagen, MVS Comunicaciones, Grupo Multimedios and Grupo Radio Centro have also established an important presence, owning several media outlets at a regional and, in some cases, national level. Only two of the main media groups in the country have their headquarters outside Mexico City: Multimedios and Megacable, based in Monterrey and Guadalajara respectively.

[31] Rodrigo Gómez. (2017). Grupo Televisa. En Birkinbine, Gómez & Wasko (eds.) *Global Media Giants* (pp. 111-124). Routledge; Gabriel Molina. (1987). Mexican television news: the imperatives of corporate rationale. *Media, Culture & Society*, 9(2), 159-187; Andrew Paxman. (2015). Mexican Democracy's Awkward Partner: Televisa as a de facto Power. *Mexico in Focus: Political, Environmental and Social Issues*, edited by José Galindo Rodríguez, 393-408; Raúl Trejo. (1985). *Televisa, el quinto poder*. Ciudad de México: Claves Latinoamericanas.

[32] Rodrigo Gómez. (2004). TV Azteca y la industria televisiva mexicana en tiempos de integración regional (TLCAN) y desregulación económica. *Comunicación y Sociedad*, (1), 51-90.

When it comes to the regional media market, it is worth mentioning the Albavisión group, which has been operating 12 digital terrestrial television stations in the southeast region of Mexico since 2017, through the Telsusa company and under the corporate brand of Canal 13. The group is owned by Ángel González González, better known as “El Fantasma”, a Mexican-Guatemalan businessman who owns different media outlets in 16 countries in Latin America and the Caribbean[33].

All three main media groups that operate national television chains broadcast a news channel. This is an indication that they see news as an asset in their business model, as well as in their relationship with political power. On the one hand, news boosts their profits as it drives advertising sales. On the other hand, news is used by these media outlets as a tool in negotiating with various political parties. Political parties and governments always expect positive coverage, both during electoral campaigns and in the day-to-day running of the government. In return, commercial broadcasters expect to receive money from state (official) advertising contracts that are awarded by the government.

The only public service media player that operates more than one broadcaster with regional coverage is the SPR, which runs Channel 14 with an outreach of 70% national coverage, and a string of radio stations run under the brand of Altavoz Radio.

AMLO’s administration has promoted the expansion of SPR’s coverage, in order to cover most of Mexico’s national territory and comply with the universal access principle specific to public service media. However, both its television broadcast and radio stations are still little known in Mexico. In addition, the president of SPR, journalist Jenaro Villamil, using his own interpretation of the Law of the Public Broadcasting System of the Mexican State, assumed the coordination of all public service media at the federal level – Canal Once, Canal 22, Instituto Mexicano de la Radio (IMER), and Radio Educación, stirring controversies among experts who claim that the legislation does not allow this.

[33] For more information on the entrepreneur we recommend: Gabriel Sosa. El Fantasma en la televisión mexicana. 22 August 2017. Sin Embargo. <https://www.sinembargo.mx/22-08-2017/3290057>

Some claim that while such coordination is desirable and necessary, it should not be led by the SPR, but rather through a rotating presidency of all public service media. Moreover, through his interventions in Channel 14 and in other public service media, the head of the SPR has turned into a fierce defender of AMLO's government, which is in contradiction with SPR's mandate, as stipulated in the SPR Law[34].

In fact, the most obvious proof of the pro-government editorial line at the SPR was the special news coverage of the "march for transformation" initiated by President López Obrador on 27 November 2022, to celebrate his fourth year in office. The coverage was carried out jointly by all federal public service media under the coordination of the SPR[35]. The "march for transformation" followed a large demonstration against the electoral reform proposed by the government of López Obrador which the opposition had organized a few weeks earlier, which was extensively covered by media outlets critical of the government[36].

Hence, through the SPR's coverage, the government sought to counterbalance the editorial policy of the commercial media, which persistently questioned the actions of the government during the entire administration of President López Obrador.

[34] Article 1 of the SPR Law states: "The decentralized public body of the Federal Public Administration, non-sectorized, called Public Broadcasting System of the Mexican State is created, endowed with legal personality and its own assets, as well as technical, operational, decision-making and management autonomy, which aims to provide the non-profit broadcasting service, in order to ensure access to the greatest number of people in each of the federal entities to content that promotes national integration, educational, cultural and civic training, equality between women and men, the dissemination of impartial, objective, timely and truthful information on national and international events, editorial independence and providing space for independently produced works, as well as the expression of diversity and plurality of ideas and opinions that strengthen the democratic life of society."

[35] Jorge Bravo. Perdimos los medios públicos. 2 December 2022. El Economista, <https://www.eleconomista.com.mx/opinion/Perdimos-los-medios-publicos-20221202-0027.html>

[36] Rodrigo Soriano & Daniel Alonso. Así le hemos contado la marcha contra reforma electoral de López Obrador. 13 November 2022. El País. <https://elpais.com/mexico/2022-11-13/marcha-contr-la-reforma-electoral-de-lopez-obrador-en-vivo-la-oposicion-sale-a-la-calle-a-defender-al-ine.html>.

Table. 3.1: Main media conglomerates in Mexico

Owner	Name	Free-to-air TV	Pay-TV	Radio	Print media	Digital /SVOD-AVOD	Telecommunications
Carlos Slim	Telmex/América Móvil		Claro Sports			Unotv/Claro video	Telmex/Infinitum (fijas), Telcel (Móvil)
Emilio Azcárraga	Grupo Televisa	Televisa Canales 2,4,5 y 9	IZZI y SKY (Varios canales de pago)			Televisa.com, SDP Noticias.com, Nmas.com/Vix+	Izzi (fijas y operadores móviles virtuales), Bestel
Ricardo Salinas	Grupo Salinas	TV Azteca; Canales 7,13 y 40	Total Play				Total Play (fijas)
Olegario Vázquez Raña	Grupo Empresarial Ángeles	Imagen Televisión Canal 3, Excélsior TV		Imagen Radio	Excélsior	Imagen Digital	
Fam. Vargas Guajardo	MVS Comunicaciones	MasTV Canal 6.3	Dish MX (- Canal 52)	Exa FM, La Mejor FM, FM Globo, Stereorey, Noticias MVS		Mvstv.com, Mvsnoticias.com	ON Internet (fijo y satelital), FreedomPop (OMV)
Fam. Robinson Bours	Megacable Comunicaciones		Megacable (-PCTV, -Mega), Noticias MX				Megamovil (OMV)
Francisco A. González Sánchez	Grupo Multimedios	Canal 6, Canal 8 (Costa Rica)	Milenio Noticias	La Lupe, La Caliente, Milenio Radio	Milenio, La Afición	MT.com, Telediario.mx	
Fam. Andrade	Heraldo Media Group	Canal 8.1		Heraldo Radio (98.5 CDMX)	Heraldo de México	Heraldodemexico.com.mx, Heraldodemexico.com.mx, Heraldousa.com	
Mexican State	Sistema Público de Radiodifusión del Estado Mexicano (SPR)	Canal 14		Altavoz Radio		Sprinforma.mx, Infodemia.mx, Mxplus.tv/television/tv-migrante, Mxplus.tv	

Source: Compilation by authors based on information gathered for this report • Created with Datawrapper

When it comes to gender balance in the media, the role of women in general remains marginal. There are no female owners or women in managerial positions in any media conglomerate. There are only a few women sitting on the board of directors of some media groups, and only one female director in the public media, Aleida Calleja, the head of the IMER. Various studies have highlighted the importance of including women in management positions to boost diversity and quality in the media[37]. According to the IFT based on data from March 2023, 58% of the total number of employees in the broadcasting industry are men[38]. The IFT carried out an analysis of 25 radio and television news programs aired over the course of five days, and subsequently found that women accounted for just 35% of news programs production personnel and 30% of news sources presented in these programs[39]. Another study found that young people, mainly men, dominate in Mexican journalism. The study highlighted the lack of diversity in the country’s media, the generally low job security, and the growing vulnerability of journalists to attacks by private and state actors[40].



[37] Aimée Vega Montiel. (2014). Igualdad de género, poder y comunicación: las mujeres en la propiedad, dirección y puestos de toma de decisión. *La ventana. Revista de estudios de género*, 5(40), 186-212.

[38] IFT. (2023). Comunicados.

[39] IFT. (2023). Monitoreo de noticias desde una visión de género. https://somasaudiencias.ift.org.mx/subsecciones/2#documento=https://somasaudiencias.ift.org.mx/archivos/Info_Monit_prog_deport_persptv_gen.pdf&id:34

[40] Frida Rodelo, et al. (2023). Periodistas en México: Encuesta de sus perfiles demográficos, laborales y profesionales. *Global Media Journal México*, 20(39), 110-159. <https://doi.org/10.29105/gmjmx20.39-512>

4. Television

The structure of free-to-air television in Mexico consists of three sectors: commercial television, public television, and community television. The latter includes social community and indigenous television. Since 2015, free-to-air television has been broadcast in digital (DTT)[41].

Commercial television concentrates the highest percentage of frequencies, mostly distributed among three groups: Televisa (Channels 2, 4, 5 and 9), TV Azteca (Channels 7, 13, 40 and Es más), and Imagen Televisión (Channels 3.1 and 3.2). Their licenses permit multiprogramming, which means broadcasting a total of four programs per channel. In other words, Televisa could broadcast 16 television programs, and TV Azteca 12 programs. They can even lease them, which means that the dominance of these companies could be even greater. However, with the rise of digital platforms and video-on-demand services, the business model of streaming television has entered into competition with these new players, prompting multiprogramming digital channels to act more cautiously.

A total of 835 digital terrestrial television (DTT) players were operational in Mexico in the first quarter of 2023[42]. Commercial television has the main share, with 547 licenses, followed by public television with 263 licenses and community television with only 36 licenses, only four of these held by social community stations (see Table 4.1).

Table 4.1: Distribution of DTT concessions by television sector, December 2023

Sector	Licenses	%, 2023
Commercial	547	63,1%
Public	263	32%
Community	36	4,4%
Social Community	4	0.50%
Indigenous	0	0
TOTAL	835	100%

Source: Authors' own compilation based on information gathered for the research • Created with Datawrapper

[41] Mexico was the first Latin American country to make the analog switch-off, mainly due to its proximity to the United States of America. For more details on this process, see Rodrigo Gómez. (2020). El rol del Estado...cit.; Rodrigo Gómez et. al. (2011). Mapping Digital Media: Mexico. London: Open Society Foundations https://www.opensocietyfoundations.org/uploads/31cd147b-75ab-4f79-b9d9-99dae3e9ac83/mapping-digital-media-mexico-20130605_0.pdf

[42] IFT. (2020). Estudio diagnóstico del servicio de televisión radiodifundida en México. Unidad de Competencia, Dirección General de consulta económica. <https://www.ift.org.mx/sites/default/files/estudiodiagnosticodelserviciodetelevisionradiodifundida-resumenejecutivo.pdf>

4.1 Commercial television

The Mexican commercial television market has high levels of concentration. In 2014, the IFT designated Televisa as a dominant player in the broadcasting sector, with control of more than 50% of the screen time, frequencies, and advertising. As a result, the IFT imposed a set of measures to avoid further distortion of free competition on the market. They required Televisa to share its infrastructure and disclose to the IFT the terms and conditions of its advertising services, and prohibited the media group from acquiring relevant audiovisual content on an exclusive basis. This included the rights to broadcast the Mexican national football team, the finals or semifinals of the Mexican football league, the opening and closing ceremonies of the Olympic Games, or the final of the football World Cup.

Since 2014, the concentration in the commercial television sector has declined as a result of two public policies: the digital transition achieved in 2015, which made the use of radioelectric spectrum more efficient; and the enactment of the Federal Telecommunications and Broadcasting Law of 2014 which, among other things, set up the IFT. The newly established regulator made a series of decisions that have contributed to the decrease of the concentration in broadcasting[43].

Yet, the degree of media ownership concentration in Mexican broadcasting is still high by international standards. According to IFT data, Televisa had a 66.8% audience share in January 2014. A decade later, it had dropped to 56%, according to December 2023 data from Ibope-Nielsen. When it comes to the portfolio of broadcast frequencies, the concentration level has declined even more, Televisa now has less than 50 percent of all broadcast licenses awarded in the country. However, Imagen Televisión, which only operated on 63 frequencies at the end of 2023, will have to start operations on 60 more frequencies, in order to comply with a requirement in its broadcast license agreement to cover 92% of the Mexican territory. According to the latest audience data available, in September 2019 the main share of the audience market was commanded by Televisa (57.7%), followed by TV Azteca (31.7%), Imagen Televisión (6.35%), Multimedios (3.85%). and other broadcasters (0.4%) [44]. In recent years, the audience share has not registered significant changes. although some slight alterations were noticed due to the entry of a few new players.

[43] IFT. (2020). Estudio de diagnóstico del servicio de televisión radiodifundida en México. Unidad de competencia económica, Instituto Federal de las Telecomunicaciones. México. <https://www.ift.org.mx/sites/default/files/contenidogeneral/competencia-economica/estudiodediagnosticodeelserviciodetelevisionradiodifundida-completo.pdf>

[44] IFT. (2020). Estudio diagnóstico...cit.

Table 4.2: Distribution of licenses by companies, 2023

Company	Licenses	Share of total number of licenses, %	Coverage share, %
Televisa (AEP-R)	249	41.0%	86.0%
TV Azteca	180	30.0%	84.0%
Imagen Televisión	123 (63)	20.0%	65.0%
Multimedios	14	2.2%	43.0%
Telsusa	14	2.2%	38.0%
Other	28	4.6%	42.0%
Total	608 (547)	100.0%	

Source: Authors’ own compilation based on information gathered for the research • Created with Datawrapper

A series of tenders to license new broadcasters allowed the launch or expansion of new regional players, including three media groups. Firstly, Multimedios, which historically operated in the northeast of the country, and which has used its newly acquired licenses to strengthen its regional position and expand to the metropolitan area of Mexico City through Canal 6 and Milenio TV. Secondly, Grupo Radio Centro with La Octava Televisión, now Herald TV, which competes in the metropolitan area of Mexico City. Finally, Telsusa, which covers Mexico City and the southeast of the country with Canal 13.

As all the broadcasters have the possibility of using multiprogramming, some of them sublease frequencies to third parties. For example, Multimedios rents broadcast space to MVS Comunicaciones to air MVS, which runs the news program Uno TV, produced by one of Carlos Slim’s companies. El Herald Media Group did the same with Imagen TV and, later, signed an agreement with La Octava to broadcast its channel Herald TV. Similarly, La Octava was broadcast via multiplex in the southeast region of the country through an agreement with Telsusa.

In addition to the changes triggered by the licensing of new broadcasters, the digital economy has also led to alterations in the Mexican television market. Grupo Radio Centro failed to enter the free-to-air television market; after only three years in operation, it had to sell its license to Heraldito Media Group, mostly as a result of its financial debts combined with its inability to produce quality, consistent and competitive programming on its flagship channel La Octava[45].

In spite of more competition on the television broadcast market, sparked by the entry of new players, no major changes have been noticed in the overall television programming. The newly entered players simply mimic the dominant players by producing similar, worn out and tested types of programs[46]. This does not improve the news plurality, as the programming formats on most commercial television channels are very similar. This is part of a strategy aimed at attracting state advertising, while their editorial lines tend to be favorable to the interests of the advertisers.

4.2 Public television

The public television sector has also experienced significant changes, following the establishment of the IFT in 2014 and the award of 153 public broadcast licenses. Having reached a total of 263 licenses by the end of 2023, the public television sector experienced growth at both national and regional levels.

The SPR received the highest number of licenses, to extend its coverage to the nationwide level and turn its channel 14 into a flagship television network. In addition, SPR is sharing both its tower and multiprogramming infrastructure to allow broadcasting of other public and university channels such as Once TV, Canal 22, Ingenio TV, and TV UNAM.

As new public broadcasters were launched in the Mexican states while the existing ones expanded, the public broadcasting sector both nationwide and at a regional level is, at least judging by the number of broadcast licenses and level of infrastructure deployment, in a phase of expansion and consolidation.

[45] IFT. (2023). Resolución mediante la cual el Pleno del Instituto Federal de Telecomunicaciones resuelve la solicitud de autorización de cambio de identidad de un canal de programación en multiprogramación, presentada por R.R. Televisión y Valores para la Innovación, S.A. de C.V., en relación con la estación de televisión radiodifundida XHFAMX-TDT, en la Ciudad de México y Área Metropolitana. <https://www.ift.org.mx/sites/default/files/conocenos/pleno/sesiones/acuerdologia/pift251023453.pdf>.

[46] IFT. (2020). Estudio diagnóstico..., cit.

On the other hand, institutional consolidation is going at a different speed. The principles of the public service stipulated in Article 86 of the Federal Law of Telecommunications and Broadcasting have not been fully complied with. They include financial management autonomy, guarantee citizen participation and espouse editorial independence. These broadcasters remain aligned, to a greater or lesser extent, to the political will and the interests of the government in office. Patricia Ortega blames the weak public service culture among the political class and society at large, as well as the lack of social and cultural roots in terms of the way these media outlets operate[47].

Table 4.3: Distribution of public broadcast licenses, December 2023

Public media	Number of broadcast licenses	Share of the market (by number of broadcast license), %
SPR (Canal 14)	61	23.2%
Once TV	61	23.2%
Estado de Sonora (Telemax)	54	20.5%
Televisión de Nuevo León (Canal 28)	24	9.1%
Corporación Oaxaqueña de Radio y Televisión	16	6.0%
Sistema Michoacano de Radio y Televisión	13	4.9%
Other	34	13.0%
Total	263	100.0%

Source: Authors' own compilation based on information gathered for the research • Created with Datawrapper

[47] Patricia Ortega. (2020). Medios Públicos: no sin sociedad. Avances y limitaciones en su regulación, in Rodrigo Gómez (ed.) A seis años de la Ley Federal de Telecomunicaciones y Radiodifusión. Análisis y propuestas, Ciudad de México: Tintable-Amedi.

4.3 Main television broadcasters

Televisa

Televisa is the most influential media company in Mexico. Founded in 1955, it is the world's leading producer of Spanish-language audiovisual content. Televisa has four free-to-air television channels and several cable channels, and operates fixed and mobile telecommunications services through its subsidiaries, including IZZI. Its programming spans a wide variety of genres, ranging from soap operas and entertainment programs to news and sports. Historically, because of its 20-year monopoly position, it is the most influential media company both in society and in politics[48].

Grupo Televisa has played a significant role in the Latin American television industry and has expanded its influence through strategic alliances and the export of its products internationally. The latest significant move by Emilio Azcárraga Jean's company was its merger with the leading Spanish-language broadcaster in the United States, Univision, which led to the emergence of the conglomerate Televisa-Univision, which operates in the United States and Mexico. The group's main objective is to become the leader in the distribution of Spanish-language content worldwide through its video streaming platform Vix+.

Televisión Azteca

Founded in 1993, Azteca is the second largest television channel network in the country and currently operates four free-to-air channels: Azteca Uno, Azteca 7, ADN 40 and A más. The channels offer a wide variety of programming, including telenovelas, entertainment programs, news and sporting events. Televisión Azteca shared the TV advertising market in a duopoly with Grupo Televisa from 1993 to 2016, until Imagen Televisión was incorporated. Over the years, Televisión Azteca has developed a global presence by exporting its programs to various international markets. Its editorial line has been very controversial, as it presents a conservative view, and the broadcaster's owner, Ricardo Salinas Pliego, stands out for his high profile and open confrontation with those who affect his interests[49]. The company also operates television channels in Guatemala and Honduras. At the beginning of 2023, it had to cease operations of its Azteca America channel in the United States due to financial problems, after competing with Univisión and Telemundo for 22 years to attract Hispanic audiences in the U.S.

[48] Rodrigo Gómez. (2017). Grupo Televisa..., cit.

[49] Rodrigo Gómez. (2004). TV Azteca y la industria televisiva mexicana..., cit.

Imagen Televisión

Imagen Televisión began operations in October 2016 as the third largest player on the Mexican television market, thus ending the duopoly of Televisa and TV Azteca. Its television grid replicates formulas tested by its competitors, so it focuses on telenovelas, news, sports and entertainment. Unlike its competitors, it produces less fiction and stands out for broadcasting Turkish telenovelas. It belongs to Grupo Ángeles, controlled by entrepreneur Olegario Vázquez Raña, who owns businesses in various industries including hospital services (Hospitales Ángeles), banking (Banca Multiva), and hotels (Camino Real, Real Inn, and Quinta Real). Today, Grupo Imagen is a media conglomerate that operates radio, television, and print media (the newspaper Excélsior) outlets.

Multimedios

Multimedios is a media company in Mexico with a presence primarily in the northeastern region of the country. Founded in 1968, Multimedios has grown to become a diversified media conglomerate^[50]. Its operations are focused on television, radio, print, and digital platforms. On the television side, Multimedios operates regional free-to-air (Canal 6 and Milenio TV) and cable channels, offering programming that includes entertainment, news, and sports. Its regional reach has allowed it to connect more closely with local audiences, helping it consolidate its position as a major player on the media scene, mainly in the state of Nuevo León and its capital Monterrey. Internationally, it operates a channel in Costa Rica (Canal 8).

Telsusa (Channel 13)

The broadcaster Telsusa belongs to the Albavisión group of Mexican-Guatemalan businessman Ángel González, known as “El fantasma” (meaning “the ghost” in English). Telsusa started to operate in 2017, following the tender for broadcast licenses organized by IFT, when it was granted licenses for 12 terrestrial stations to operate in 12 cities in southeast Mexico. The group currently operates 14 TV stations and broadcasts a generalist television program under the Canal 13 brand. Through infrastructure and multiprogramming agreements with Octava and Heraldo TV, it also covers Mexico City. With this broadcaster, González actively entered the television market in Mexico, adding another media asset to his businesses in Latin America. The Albavisión group currently owns media in Argentina, Bolivia, Chile, Costa Rica, Ecuador, El Salvador, Guatemala, Nicaragua, Paraguay, Peru, and the Dominican Republic^[51].

^[50] The group’s historical investments include radio station XEAM, until 1968 when it began to incorporate other means of communication.

^[51] Gabriel Sosa. (2017). El Fantasma..., cit.

Heraldo Television

A recently created media conglomerate, Heraldó Television belongs to the Andrade Group, which specializes in car dealerships. In 2017, the company relaunched the newspaper El Heraldó, and since 2019 it has been buying radio stations in several cities, building a radio chain under the name Heraldó Radio. As of February 2020, thanks to multiprogramming, it leased the signal of channel 28 from Imagen Televisión and, later, one of the channels of La Octava to broadcast its news channel, Heraldó Televisión. In 2023, it purchased the license rights from Grupo Radio Centro (La Octava), becoming the license owner of channel XHFAMX-TDT in Mexico City, with coverage in four different Mexican states.

Once TV

Once TV Mexico is the oldest educational television network in the country and is operated by the National Polytechnic Institute. Founded in 1959, it is based in Mexico City and its programming is oriented towards education, culture, and entertainment. Once TV has stood out for its educational approach, offering programs that promote knowledge and culture to its audiences. It produces a variety of original programs covering topics such as science, politics, art, music, sports, and news. Throughout its history it has won international awards for its children’s programs. It currently broadcasts two programs thanks to multiprogramming and, in recent years, thanks to infrastructure sharing with SPR’s Channel 14, it covers 70% of the national territory.

Channel 22

Televisión Metropolitana (Canal 22) began operations in 1982. Its budget and operation depend on the Ministry of Culture. It is a public television channel focused on the dissemination of culture and education. Its programming includes music, dance, sports, literature, theater, Mexican cinema, international art cinema, and cultural documentaries, standing out for its educational approach and commitment to the preservation of cultural heritage. Canal 22 produces original content ranging from documentaries to analytical programs, and uses digital platforms to reach wider audiences. Through multiprogramming and SPR’s infrastructure, it reaches 56% of the national territory.

SPR

SPR Canal 14 is a new player in the public media universe in Mexico. It was created in 2014 through the Law of the Public Broadcasting System of the Mexican State. It stands out for its institutional design, as it is the first decentralized public media with a legal personality and its own assets. SPR Canal 14 offers programming that includes music, performing arts, news, documentaries, and educational programs. The broadcaster uses and promotes digital platforms to expand its reach. It also promotes access to quality content from all other public media. In fact, through its infrastructure and multiprogramming, it carries the programs of Once TV, Canal 22, TV UNAM, and Ingenio TV. SPR Canal 14 seeks to become the public channel of reference, exploiting its advantages - the largest broadcast infrastructure in the country, coverage (72% of the national territory), and public budget. It also runs an OTT (over-the-top) platform called MxPlay, through which it offers access to live broadcasting through SPR channels, as well as other public channels such as Once TV and Capital 21.



5. Radio

The radio market in Mexico is structured on three levels: commercial radio, public radio, and community radio (including social community and indigenous radio). As with most of the countries of the region, commercial radio is the one that concentrates the largest percentage of frequencies. Nevertheless, in recent years, public and community radio have seen an increase in their shares on the license market. The right to grant licenses to social community and indigenous radio stations was finally recognized following the 2013 constitutional reform of telecommunications and the enforcement of the 2014 Federal Telecommunications and Broadcasting Law[52]. This situation should be highlighted as a significant advance, since until then there was no legal framework for these radio stations, which limited the plurality of voices and blocked the democratization of media and communication in Mexico. However, more initiatives are still needed to promote indigenous radio stations in achieving sustainability. Above all, native peoples should have access and visibility in the Mexican public eye, especially through non-indigenous media[53].

According to the IFT, a total of 2,044 radio stations were operational on the AM and FM bands in Mexico in 2022. Commercial radio (65% of frequencies) has a market share three times larger than public radio (17%) and ten times larger than community and indigenous radio (6%), despite the fact that Mexico has 68 indigenous peoples, and that two out of every ten Mexicans consider themselves indigenous. Mexico transitioned from the AM to FM radio band as a result of a frequency change policy adopted in 2010.

In terms of ownership, there is also a high level of concentration on the Mexican radio market, but not as high as in television. According to a new study on the shareholding structure of radio frequency holders, conducted by Francisco Vidal Bonifaz, around one-third of all commercial radio stations in Mexico are owned by five groups or families: Radiorama (14%), Grupo ACIR (4.5%), Multimedios (3.1%), Grupo Fórmula (3.1%), Grupo Radio Centro (2.7%), and MVS Radio (2.6%)[54].

[52] Rodrigo Gómez. (2018). The Mexican third sector..., cit.

[53] Clara Luz Alvarez. (2023). Personas indígenas en la televisión: su no discriminación y el derecho a la información de la sociedad. *Estudios en derecho a la información*, (16), 3-34.

[54] Francisco Vidal Bonifaz. (2021). El estado de la concentración de la propiedad en la radio comercial abierta en México, in *Revista Latinoamericana de Ciencias de la Comunicación*, Número 36, pp. 88-90.

In 2019, Grupo Televisa decided to sell 50% of the shares in Sistema Radiópolis, a company that operates 18 AM/FM radio stations, with coverage in 22 Mexican states, including the historical W station, today known as W Radio. The other 50% of the shares have been controlled by the Spanish group Prisa since 2002, which is the only foreign group that currently operates on the radio broadcasting market in Mexico. With the exit of Grupo Televisa, the new investors and the Spanish group experienced tension triggered by their desire to control content and financial operations. These disputes ended up in court. In April 2022, the three Mexican investors in the company (Crédito Real, Corporativo Corral, and Barrister Services) and the Prisa group reached an agreement regarding the assigning of board members and the management of the company^[55].

Most of the five companies that dominate the radio broadcasting sector are part of conglomerates that operate television channels (such as Multimedios, MVS, and Grupo Fórmula) or newspapers and magazines (Multimedios). Another characteristic of the Mexican commercial radio sector is the fragmentation of ownership. One fifth of the largest radio stations are shared among owners who control only one or two stations.

In the case of public radio, licenses are awarded to various federal and state government agencies, universities, and public and private technological institutes. At the federal level, IMER operates 17 terrestrial radio stations in the country, and the National Institute of Indigenous Peoples (*Instituto Nacional de los Pueblos Indígenas*, INPI) has 37 radio licenses, with only 22 currently being in use. At a state level, the governments of Oaxaca and Sonora stand out for the high number of granted licenses (33 and 30, respectively). Regarding the licenses for social community use (which are not community or indigenous), the number has increased significantly in recent years to 253, yet many of them are far from achieving educational or cultural diversity related objectives. Dozens of these stations are operated by institutions and organizations that represent the interests of the same commercial radio groups, local politicians, and churches.

[55] Nicolas Lucas. IFT ratifica la nueva configuración accionaria de Radiópolis; Prisa se queda con el 50% de la empresa. 8 November 2022. *El Economista*. <https://dplnews.com/mexico-ift-ratifica-la-nueva-configuracion-accionaria-de-radiopolis-prisa-se-queda-con-el-50-de-la-empresa/>.

In terms of radio penetration, according to IFT data, some 48.5% of Mexican households own radio sets. Nevertheless, 20% of all citizens use their mobile phone (through applications and internet sites) to listen to radio. In the country’s three main cities (Mexico City, Guadalajara, and Monterrey), 8.8% of consumers listen to the radio for more than six hours, Monday to Sunday. During various time slots, such as from 9 a.m. to 10 a.m., the radio listenership reached 14.87% (July 2021 to June 2022)[56]. According to the IFT’s National Survey of Audiovisual Consumption 2022, some 38% of Mexicans listen to the radio for an average of 3.1 hours a day. Music programs have the highest audience rate, with 82% of listeners, followed by news programs with 41%[57].

Table 5.1: Radio market in Mexico, 2023

Type of radio	Broadcasters	Share of total, %
Commercial	1,365	65%
Public	347	16%
Community	267	12%
Social Community	141	6%
Indigenous	27	1%
TOTAL	2	100%

Source: Authors’ own compilation based on data from Registro Público de Concesiones del IFT. Infraestructura de estaciones de radio AM y FM • Created with Datawrapper

[56] IFT. (2022). Anuario Estadístico 2022. <http://bit.ift.org.mx>.
 [57] IFT. (2022). Encuesta Nacional de Consumos Audiovisuales 2022. <https://somosaudiencias.ift.org.mx/sub-secciones/2>.

5.1 Main radio groups

Radiatorama

Radiatorama is the largest radio group in Mexico with 181 radio stations distributed throughout the country, including Mexico City. Radiorama was founded in 1970 and over the years it has increased the number of its radio stations. The broadcaster was co-founded by Javier Pérez de Anda and Adrián Pereda López, who previously collaborated with Organización Radio Centro (Grupo Radio Centro). Radiorama is a family-owned company[58]. According to researcher Fátima Fernández, former public officials control some of the first licenses awarded to the group[59].

ACIR Group

The company is owned by the Ibarra family and was founded in 1963 by Francisco Ibarra López, previously a director of the Núcleo Radio Mil group. Like most radio groups, it has expanded over the years. It currently operates 57 radio stations in 25 cities. Its main source of income comes from its six radio stations located in Mexico City. In 1997, the U.S. company Clear Channel acquired 40% of the company's shares, in compliance with the Federal Law of Radio and Television (later replaced by the Federal Law of Telecommunications and Broadcasting), which limited foreign investment in the sector. The alliance with the U.S.-based group ended in 2007 when Grupo ACIR re-acquired the previously sold shares[60]. Mexican businessman Carlos Slim was a shareholder of Grupo ACIR for several years. Between 2014 and 2019, the broadcaster had an agreement with The Walt Disney Company for the use of the Radio Disney brand on several of its radio stations. In 2018, ACIR Group, in association with the U.S.-based broadcaster iHeartMedia, launched the iHeartRadio network in Mexico[61].

[58] Nicolas Lucas. Radiorama y Grupo ACIR salvan su concentración en la CDMX, Chihuahua y Michoacán. 1 June 2020. *El Economista*. <https://www.eleconomista.com.mx/empresas/Radiatorama-y-Grupo-ACIR-salvan-su-concentracion-en-la-CDMX-Chihuahua-y-Michoacan-20200601-0053.html>.

[59] Fátima Fernández Christlieb. (1991). *La radio mexicana, centro y regiones*, México, Ed. Juan Pablos, p. 147.

[60] Gabriel Sosa. ACIR se divorcia de Clear Channel. 2 October 2007. *El Universal*. <https://archivo.eluniversal.com.mx/columnas/67602.html>.

[61] Gabriel Sosa. Grupos, cadenas y alianzas estratégicas en la radio. August 1996. *Revista Mexicana de Comunicación*. <https://gabrielsosaplata.com/2014/11/13/grupos-cadenas-y-alianzas-estrategicas-en-la-radio-agosto-1996/>.

Multimedios Radio

Multimedios Radio is a division of Multimedios Group, one of the most important media conglomerates in Mexico, which also publishes newspapers such as Milenio and La Afición and broadcasts television channels in various cities in the country (including Mexico City). It also operates outdoor advertising and graphic production companies such as Pol y Multigráfica, owns sports brands such as Mediotiempo.com and Séptima Entrada, and publishing houses such as Ríos de Tinta[62]. The broadcaster was founded by Francisco Dionisio González, who launched the radio station XEAW-AM in Monterrey back in 1933. It has remained a family business ever since. Multimedios Radio has 40 broadcast licenses, but it does not cover Mexico City[63].

Formula Group

The company was founded in 1968 by Rogerio Azcárraga Madero, nephew of the founder of XEW and later Televisa, Emilio Azcárraga Vidaurreta. The group's founder died on 12 April 2022. Radio was the core business of Formula Group, but it has also been linked to the music industry and other activities unrelated to communications. The network was formed by several radio stations that were part of Emilio Azcárraga Vidaurreta's Radiópolis network, based in Mexico City, and has been expanding its presence locally and nationally with new licenses, acquisitions, and commercial agreements with other radio groups. The company operates five radio stations in Mexico City and has several national radio chains, as the owner of 39 radio stations and having franchised others. It currently broadcasts its news and entertainment programs on pay channels under the name Telefórmula.

Grupo Radio Centro (GRC)

Grupo Radio Centro owns 34 radio stations in Mexico's main cities and has its headquarters in Mexico City. The company was founded by Francisco Aguirre Jiménez in 1946 as Cadena Radio Continental. Six years later, it was renamed to Organización Radio Centro. In 1965, a new entity was set up under the name Organización Impulsora de Radio (OIR) to commercially represent affiliated radio stations[64]. Cadena Radio Centro (CRC) was founded in 1983 with the aim of attracting Hispanic audiences in the United States.

[62] Multimedios Radio. (2024). <https://www.mradio.com/>.

[63] Nicolas Lucas. Multimedios vende sus activos de radio y televisión en Monclova. 13 April 2023.El Economista. Multimedios vende sus activos de radio y televisión en Monclova (eleconomista.com.mx).

[64] Gabriel Sosa. (1996). ACIR se divorcia..., cit.

In 1994, the company sold CRC and acquired shares in the U.S.-based company Heftel Broadcasting. In 1995, Grupo Radio Centro decided to sell the Heftel shares and invest in Radiodifusión Red, in order to increase its presence in Mexico City. GRC is the only radio company listed on the stock market since 1993. Francisco Aguirre was the license owner of television channel 13 between 1968 and 1972, until the federal government bought the license from him[65]. Many years later, his son, Francisco Aguirre Gómez, sought to venture into television again. He succeeded in 2015 when he won the tender for a nationwide broadcast network license, but was unable to pay the amount that had to be paid to the authority. Again, in 2017, he participated in a tender and won the license for a television channel in Mexico City: La Octava TV. However, due once again to financial problems, he was forced to sell the television channel to El Heraldo Media Group in June 2022.

MVS Radio

MVS Radio is part of a conglomerate called MVS Comunicaciones, which operates pay television channels, the Dish satellite television network in Mexico, a publishing house, and an advertising company. MVS was founded in 1967 by Joaquín Vargas Gómez (1925-2009), a businessman who continually attempted to break Televisa's monopoly on the television market with companies such as MVS Multivisión, a pioneer in microwave television, and DirecTV, a satellite television which ceased operating in Mexico in 2004. The Vargas family owns other businesses, including Corporación Mexicana de Restaurantes (CMR). In radio, it is the license owner of 33 frequencies in the country, where it runs radio channels that reproduce broadcast concepts tried elsewhere, such as Exa FM, La Mejor, FM Globo and others, which in turn are rebroadcast on affiliated stations in Mexico. They are also broadcast in countries such as Argentina, Costa Rica, Ecuador, El Salvador, Honduras, the Dominican Republic, and the United States[66].

IMER

Mexican Radio Institute (IMER) is an entity of the Mexican State founded in 1983 and comprising 17 radio stations, which operate in the central region of the country, as well as in the northern and southern borders and the Yucatan Peninsula. These radio stations reach 10 locations in eight states (Chiapas, Yucatán, Michoacán, Michoacán, Oaxaca, Baja California, Chihuahua, Coahuila, and Sonora, in addition to Mexico City and the metropolitan area). Due to the power of its radio signal, IMER's programming can actually be listened to in 17 Mexican states. In 2020, IMER became a decentralized organization, which allows it to gain greater autonomy[67].

[65] Gabriel Sosa. (2021). Días de radio. Los 100 años de la radio en México. México, Ed. Tintable, p. 63.

[66] Gabriel Sosa. Dish rompe un monopolio. April 2009. Revista Mexicana de Comunicación on line. <http://www.mexicanadecomunicacion.com.mx/Tables/rmxc/sosa.htm>.

[67] IMER. (2024). Qué es el IMER. <https://www.imer.mx/que-es-el-imer/>.

Radio Educación

Radio Educación was established in November 1924. It is considered the first “cultural” radio station in Mexico, created at the initiative of the then Secretary of Public Education, José Vasconcelos. It is currently a decentralized entity of the Ministry of Culture. It operates four radio stations – two in Mexico City, one in Mérida (Yucatán), and another in Hermosillo (Sonora). It also has a license for a frequency in Morelia (Michoacán), but has not yet begun to broadcast there. Radio Educación owns the only shortwave radio station in Mexico. It is the largest producer of cultural and educational radio content in the country: around 25,000 productions or live broadcasts of Radio Educación are rebroadcast annually by dozens of public radio stations. Its newscasts, called Pulso, are rebroadcast on more than 20 stations nationwide, and on more than 20 Radio Bilingüe affiliated stations in the United States[68].



[68] General Directorate of Radio Education. (2021). Informes Trimestrales. <https://radioeducacion.edu.mx/informes-trimestrales-2019-2021>.

6. Newspapers

Print media have an important place in Mexico’s journalistic history. Their origins date back to the first decade of the 19th century, when *El Despertador Americano* was launched in 1810, during the War of Independence. Throughout that century, a myriad of newspapers were published in an era of partisan and religious press, which was not yet structured by the emergence of journalism as a profession.

One hundred years after the appearance of *El Despertador Americano*, the first newspapers produced at industrial scale began to be printed, some of which are still in circulation. These still have significant influence in the country’s public sphere, with notable publications including *El Universal* (1916) and *Excélsior* (1917), published in Mexico City, *El Informador* (1917) based in Jalisco, *El Siglo de Torreón* (1922) printed in Coahuila, *El Diario de Yucatán* (1925) serving the eponymous state in Mexico’s southern area, *El Imparcial* (1937) operating in Sonora, and *El Norte* (1938) distributed in Nuevo León.

Throughout the 20th century, hundreds of publications appeared in the 32 states of Mexico. These newspapers were developed under an industrialized journalistic model with unequal advances in their professionalization[69]. For example, Organización Editorial Mexicana (OEM) was founded in 1976 and became one of the most important press publishers in the country, with newspapers in most cities and other urban centers. It currently has 46 newspapers in circulation[70]. In the 1980s, some new editorial projects emerged, including *El Financiero* (1981) and *El Economista* (1988), two newspapers dedicated to economic reporting, as well as *La Jornada* (1984), a generalist newspaper produced in the country’s capital.

[69] Rubén Arnoldo González Macías & Martín Echeverría. (2018). A medio camino. El sistema mediático mexicano y su irregular proceso de modernización. *Revista mexicana de opinión pública*, núm. 24: 35–51; Juan Larrosa-Fuentes. (2014). Transformaciones en la economía política de las empresas periodísticas: periódicos artesanales, industriales y post-industriales. *Retos y oportunidades del periodismo digital*, ed. Rosalía Orozco Murillo. Guadalajara: Universidad de Guadalajara, 71–86.

[70] OEM. (2023). Organización Editorial Mexicana <https://www.oem.com.mx/>

The 1990s and the first decade of the 21st century brought the emergence of the first two press conglomerates from the state of Nuevo León. The first to be founded was Grupo Reforma. In 1993, the owners of the newspaper El Norte decided to launch the newspaper Reforma in Mexico City, and in 1998, they launched Mural in Guadalajara. Something similar happened with Grupo Multimedios, a press group from Nuevo León, which started operating El Diario de Monterrey in 1967. In the late 1990s, the company began to publish newspapers in Mexico City, as well as in the states of Mexico, Jalisco, Coahuila, Guanajuato, Hidalgo, Puebla, and Colima. These are some of the most important and relevant newspapers in the country. However, there are currently more than 450 print media titles circulating in Mexico[71], according to data from the National Register of Print Media (Padrón Nacional de Medios Impresos, PNMI)[72] and the National Directory of News Media (Directorio Nacional de Medios Informativos, DNMI), curated by experts in journalism and communication[73].

[71] Historically, Mexico has had a deficient system for generating information related to its media industries. Newspapers, in this case, have a duty to report certain information to the Ministry of the Interior so that it can prepare the National Register of Printed Media. However, there is no monitoring or auditing system of the information reported by the newspapers. On the other hand, no newspaper in the country is listed on the stock exchange; therefore, newspaper publishers do not have any legal obligation to publicly report their economic performance.

[72] Secretaría de Gobernación. (2023). Padrón Nacional de Medios Impresos. <https://pnmi.segob.gob.mx/reportes>

[73] Rubén Arnaldo González Macías et al. (2023). Panorama de los medios informativos, ...cit.

Table 6.1: Number of printed media outlets by state, 2022

PNMI: National Register of Print Media (Padrón Nacional de Medios Impresos) DNMI: National Directory of News Media (Directorio Nacional de Medios Informativos)

	PNMI	DNMI
State	Number of newspapers	Number of newspapers
Aguascalientes	4	9
Baja California	14	12
Baja California Sur	3	6
Campeche	6	11
Chiapas	11	13
Chihuahua	8	6
Ciudad de México	157	63
Coahuila	14	20
Colima	4	5
Durango	3	8
Estado de México	33	38
Guanajuato	19	22
Guerrero	4	15
Hidalgo	9	13
Jalisco	11	10
Michoacán	5	4
Morelos	11	8
Nayarit	3	4
Nuevo León	8	12
Oaxaca	8	11
Puebla	12	21
Querétaro	17	13
Quintana Roo	12	17
San Luis Potosí	4	19
Sinaloa	13	6
Sonora	8	12
Tabasco	12	13
Tamaulipas	18	18
Tlaxcala	1	3
Veracruz	33	30
Yucatán	10	12
Zacatecas	5	5
Total	480	459

Source: Authors' own compilation based on data from PNMI and DNMI • Created with Datawrapper

Although there is a difference of 21 publications between the two databases, the two sources of information about print media in Mexico offer a good picture of the size of the industry. According to both sources, it's evident that there is a high concentration of print publications in the country's capital city. Yet, there is considerable variation between the two sources: the Ministry of the Interior's database shows that there are 157 publications in Mexico City, equivalent to 32.7% of the total, while the independent study reports 63 print media, equivalent to 13.7%. On the other hand, both databases show the states of Mexico, Veracruz, and Guanajuato as having an abundance of printed press, while states such as Nayarit and Tlaxcala have just a few publications.

A feature that has historically characterized Mexican newspapers is their low circulation and readership levels[74]. The largest circulation reported by a newspaper in Mexico is that of the daily *Reforma*, available in the capital city, with 174,000 copies printed per day. This number is low, especially for Mexico City, whose metropolitan area is inhabited by more than 19 million people.

Although it may seem counterintuitive, low circulation does not indicate the irrelevance of the print media. On the contrary, these newspapers have significant influence, because their readers are political and social elites such as public servants, journalists, businessmen, academics, intellectuals, and social leaders. The contents of most newspapers are not aimed at mass audiences, although there are certainly popular and widely distributed publications. On the other hand, the digital versions of many of these newspapers are ranked highest in terms of reputation and consumption.

[74] Claudia I. García Rubio. (2013). Radiografía de la prensa diaria en México en 2010. *Comunicación y sociedad*, núm. 20 65–93; Enrique Sánchez Ruíz. (1994). El público de la prensa: la insostenible levedad de casi no ser. *Anuario de Investigación de la Comunicación CONEICC*, núm. 1. <http://ojs.coneicc.org.mx/index.php/anuario/article/view/34>

Table 6.2: Average daily printed copies of newspapers, Mexico City, 2022

Note: Print circulation, as a metric, has been criticized because it indicates how many copies are printed, but it is not known how many are put into circulation or, more importantly, how many people read each copy.

Newspaper	Print run
Reforma	174.209
El Universal	122.905
Excelsior	111.321
La Jornada	103.246
Milenio Diario	99.827
El Financiero	91.89
El Sol de México	64.111
El Economista	41.771

Source: Authors' own compilation based on data from PNMI • Created with Datawrapper

The low circulation and elitist readership specific to the Mexican print press lead to a third feature of the print media sector, which shows the close relationship of this industry with political spheres. Mexican newspapers in circulation before the 1980s were created under a semi-authoritarian political regime in which the boundaries between the press and political power were blurred. During that period, which lasted more than seven decades, it was common for journalists to be paid directly by government agencies, or to receive extra payments for political favors such as not publishing certain information. Publishers also benefited from tax exemptions and economic aid through the purchase and sale of state advertising[75].

Starting in the 1980s, new newspapers gradually emerged, seeking a different relationship with the government and political actors, increased journalistic professionalism, and financing through the sale of private advertising which would lead to greater editorial independence[76]. However, some of the features of the older press still survive.

[75] Sallie Hughes. (2006). *Newsrooms in Conflict*. United States: University of Pittsburgh Press, 2006; Chappell Lawson. (2002). *Building the Fourth Estate: Democratization and the Rise of a Free Press in Mexico*. California: University of California; Williams A. Orme, ed., (1996). *A Culture of Collusion: An Inside Look at the Mexican Press*. Florida: University of Miami: North South Center Press.

[76] Sallie Hughes.(2006). *Newsrooms in Conflict...*, cit; Chappell Lawson. (2002). *Building the Fourth Estate...*, cit; Juan Larrosa-Fuentes. (2018). *Los periódicos de Guadalajara entre 1991 y 2011: el ocaso de la prensa industrial*. In *Estudios sobre periodismo en México: despegue e institucionalización*, ed. María Elena Hernández Ramírez. Guadalajara: Universidad de Guadalajara. 189-244.

In the Mexican public debate there is an unofficial typology for newspapers, which classifies these media depending on their range of reach and influence. In the first category, there are the newspapers in nationwide circulation, media with high influence in the debates affecting the federal government and which, in theory, are read throughout the country. The second category comprises newspapers with state coverage whose influence is limited to the state in which they are published. Finally, there is the local press, which generally has the audience concentrated within a city or municipality. The most important Mexican newspapers at the nationwide and state levels are featured below.

6.1 Newspapers that report nationally relevant information

The “national circulation newspapers” have three features in common. The first is that they are produced and edited in the country’s capital, Mexico City. The second is that their content tends to be focused on reporting news, facts, and events that take place at the national level. For example, their sources are the Presidency of the Republic, the Congress of the Union, and the Supreme Court of Justice of the Nation. The third is that they are read by political and social elites from different parts of the country, as a way to learn about national events.

However, in Mexico, there are no newspapers with nationwide circulation in the literal and strict sense. None of the newspapers that are classified under this label circulate throughout the entire national territory. Most of their circulation takes place in Mexico City, and printed copies are sent daily to some of the most important regional capitals. On the other hand, they are not nationwide newspapers in terms of content. Although they do generate information from different states, covering state affairs is not the focus of their attention. Finally, they do not have a massive nationwide readership for two primary reasons. The first is that, as mentioned above, these newspapers are mostly read in the capital. The second reason is that the number of the printed copies of these newspapers is too low to circulate in a country with more than 125 million inhabitants. For this reason, we consider that the name “newspapers that report nationally relevant information” is more appropriate.

Brief profiles of eight newspapers that report nationally relevant information will be presented in this report. These newspapers were chosen for their history on the market, their prestige and influence, as well as their circulation levels. The newspapers are presented according to their age^[77].

El Universal

This is one of the oldest newspapers in the country. It was first published on 31 October 1916 in Mexico City. Juan Francisco Ealy Ortiz has been the owner of the newspaper (and also its president and director) since 1969. According to the PNMI, El Universal has an average daily circulation of 122,000 copies. The web portal of El Universal is among the largest in the country by audience (see 6.4 *Online news in this report*).

Excélsior

Founded by Rafael Alducín in Mexico City, Excélsior published its first edition on 18 March 1917, four months after the launch of El Universal. The publisher has changed ownership several times throughout its history. It is currently called GIM Compañía Editorial S.A. de C.V. The owner and president of Excélsior is Olegario Vázquez Raña, a prominent businessman who also owns media outlets in the broadcasting sector (Grupo Imagen), as well as other ventures outside the media industry. Excélsior currently reports an average daily circulation of over 111,3000 copies. Its content can be read on its web portal as well.

El Sol de México

This newspaper is published by Compañía Periodística del Sol de México, S.A. de C.V. and belongs to Organización Editorial Mexicana (OEM). Mario Vázquez Raña, who has now passed away, was the founder of the newspaper, and of OEM as an enterprise. El Sol de México was first published on 25 October 1965 in Mexico City. Paquita Ramos Vázquez, Vázquez Raña's widow, is currently the publisher's president and general manager. According to the PNMI, the newspaper has an average daily circulation of some 64,000 copies.

^[77] The information used to draft the profiles in this section comes from the newspapers' websites as well as from the Ministry of the Interior's PNMI.

El Financiero

This is a finance and business oriented newspaper that was first published on 15 October 1981 in Mexico City. El Financiero is currently edited by Grupo Editorial Lauman and its director is Enrique Quintana López. In 2013, the Mexican newspaper signed a partnership agreement with Bloomberg news agency and launched a joint venture Spanish-language business news service. El Financiero has an average daily circulation of nearly 92,000 copies.

La Jornada

The newspaper La Jornada was first published on 19 September 1984 in Mexico City. Publisher Demos, Desarrollo de Medios, S.A. de C.V. was one of the first to decide to print the publication in tabloid form, leaving behind the broadsheet format of the more traditional newspapers. La Jornada was a journalistic initiative which, from its early days, openly declared a leftist editorial line. The newspaper reports an average daily circulation of 103,000 copies, and distributes its content through its [web page](#) as well. The current director of La Jornada is Carmen Lira Saade.

El Economista

This newspaper El Economista was first published on 5 December 1988 in Mexico City. Together with El Financiero, El Economista has established itself as one of the most relevant publications in the field of economic and financial journalism, while also competing with the generalist newspapers in Mexico. The publisher, Grupo Editorial, S.A. de C.V., currently has Jorge Nacer Gobera as its president and Francisco Ayza as its general manager. This newspaper is printed Monday through Friday with an average of 41,700 copies daily, and its content is also available on its [website](#).

Reforma

This newspaper has been printed in Mexico City since 20 November 1993. Reforma is part of a consortium called Grupo Reforma, owned by the Monterrey-based Junco de la Vega family. Currently, the editor of Reforma is Juan Pardinás, and the newspaper has a circulation in excess of 174,000 copies per day. Reforma, as well as the group in general, has traditionally had a center-right editorial line with an affinity towards the business class[78]. Reforma's [portal](#) is also one of the most visited news websites in Mexico.

[78] Cintia Smith Pussetto, Nancy Janett García Vázquez, & Jesús David Pérez Esparza. (2008). Análisis de la ideología empresarial regiomontana. Un acercamiento a partir del periódico El Norte, CONfinés de Relaciones Internacionales y Ciencia Política 4, núm. 7. 11-25.

Milenio Diario

This newspaper was launched on 1 January 2000, in Mexico City. This journalistic project was part of an expansion process of Grupo Multimedios, a Monterrey-based company. Currently, the publisher’s president is Francisco D. González. Milenio Diario has an average daily circulation nearing 100,000 copies, and also publishes news on its [website](#).

6.2 Newspapers reporting state relevant information

The second group of newspapers in our classification are those dedicated to generating information on what is happening in a particular state. Similar to how their peers operate on a nationwide level, state newspapers tend to concentrate their work on what the state government is doing and on events that take place in the state capital. They rarely have the capacity to generate news on what is happening in all the municipalities and cities that make up the state. Likewise, their circulation and readership tends to be limited to urban centers.

In the last twenty years, an important process of centralization of these newspapers has developed, leading to a concentration of information. This process has affected the ownership of newspapers, the journalistic workforce, and the editorial content printed by these publications[79]. In terms of ownership, two business groups have expanded in different states through the purchase of local newspapers. Grupo Reforma and Grupo Milenio have bought newspapers in different state capitals between 2000 and 2020. OEM, on the other hand, has had newspapers circulating in all the states for decades.

The change in media ownership has had two negative effects. The first is that the number of journalists working for local newspapers has been reduced, as the newspaper groups, through digital technologies, have the power to create deterritorialized newsrooms that operate in different cities in real time.

[79] Juan Larrosa-Fuentes. (2018). Analyzing Spatialization in Newspapers’ Production: A Case Study of Guadalajara’s Daily Press. *International Journal of Communication* 12: 3473–89.

For example, in local newspapers, the positions of journalists and editors dedicated to national or international information have tended to disappear, as this information is generated in Mexico City and then published by all the newspapers in the group. The second effect is the phenomenon of “editorialization” [80] that occurred in many of these newspapers, a situation where state media, lacking the capacity to produce sufficient local content, tend to give more space to nationally relevant information. As a result, these state-focused newspapers tend to publish less locally relevant news content.

Below, we offer brief profiles of three press groups that run state-focused newspapers throughout Mexico, as well as local newspapers with a long history.

Organización Editorial Mexicana

Known as OEM, Organización Editorial Mexicana is one of the oldest press groups in Mexico. OEM was set up in 1976, when Mario Vázquez Raña took over several newspapers printed in many of the country’s state capitals. From there, Vázquez Raña, who died in 2015 and left OEM in the hands of his family, built a press conglomerate with dozens of newspapers, which led some observers to consider him the Mexican “Citizen Kane” [81]. OEM’s newspapers have historically been considered “officialist” because, in general, they have been uncritical of the respective governments in power. Currently, according to its web page, OEM has a portfolio of 46 newspapers and 43 news portals. Although they do not have newspapers in all of Mexico’s states, OEM is the press group that owns the highest number of newspapers in Mexico. Most of the state newspapers they own are titled El Sol, followed by the name of the state or city where they circulate, for example: El Sol de Hermosillo, El Sol de Durango, El Sol de Sinaloa, El Sol de Toluca, El Sol del Centro, among many others.

Grupo Reforma

This group was born in Monterrey, the capital of Nuevo León, one of the northern states in Mexico. Historically, this state has concentrated wealth and business capital, and it is no exception in the media sector. The history of Grupo Reforma began in 1922 when the Junco de la Vega family started publishing the newspaper El Sol. Later, in 1938, they founded El Norte, a newspaper that is still in circulation in Monterrey and has an important influence in the local public sphere.

[80] Antonia González-Borjas. (2000). El fenómeno de la ‘edición local’ y la prensa local. *Ámbitos*, núm. 4. 87–100.

[81] Juan Larrosa-Fuentes. Mario Vázquez Raña, ¿el Ciudadano Kane mexicano? 22 February 2015. Sistema Autorreferencial. <https://autorreferencial.wordpress.com/2015/02/22/mario-vazquez-rana-el-ciudadano-kane-mexicano/>

In addition to El Norte in Monterrey and Reforma in Mexico City, the group owns the Mural newspaper in Guadalajara[82]. These three publications form, in terms of journalistic and purchasing markets, the “golden triangle”, as these three urban centers are home to three quarters of the population with the highest purchasing power in Mexico[83]. Grupo Reforma’s newspapers have always had a center-right editorial line and an affinity with the business class[84].

Grupo Milenio

Founded by Jesús Dionisio González González, Grupo Milenio began publishing newspapers in Nuevo León during the 1970s. The first newspaper was El Diario de Monterrey, which today is named Milenio Monterrey. In 2000, the group expanded to Mexico City and launched Milenio Diario[85]. Since then, the group has launched the following state newspapers: Milenio Monterrey, managed by Luis Salazar; Milenio Jalisco, managed by Manuel Baeza Sánchez; Milenio Laguna, managed by Marcela Moreno; Milenio Estado de México, managed by Sergio Villafuerte; Milenio León, managed by Miguel Angel Puértolas; Milenio Hidalgo, managed by Eduardo González; Milenio Puebla, managed by Pablo Ruiz; and Milenio Tamaulipas, managed by Pedro Elizalde. All these newspapers generate news in their localities and publish it both in print and digital format. Grupo Milenio is part of Grupo Multimedios, a conglomerate of press, radio, television, and non-media companies[86].

El Informador

One of the oldest newspapers in Mexico, El Informador was founded in 1917 in Guadalajara, the capital of the state of Jalisco. The publisher is a family-owned business that has been managed by the Álvarez del Castillo family since its inception. Unión Editorialista S.A de C.V. is currently controlled by Carlos Álvarez del Castillo Gregory, who is the grandson of the newspaper’s founder. In general, El Informador has been considered to be a pro-government publication[87]. It has an average daily circulation of nearly 43,500 copies and also publishes its own digital portal, which is among the news websites with the highest traffic in the country (see 6.4 *Online news in this report*).

[82] Juan Larrosa-Fuentes. (2018). Los periódicos...cit; María Elena Hernández Ramírez. (2010). Franquicias periodísticas y sinergias productivas en la prensa mexicana: en busca de nuevos modelos de financiamiento. Estudios sobre periodismo: marcos de interpretación para el contexto mexicano, ed. María Elena Hernández Ramírez. Guadalajara: Universidad de Guadalajara. 55-121; Eric Sandoval de la Torre. (2022). La historia de Mural y los 100 años de Grupo Reforma. En Medios de comunicación y derecho a la información en Jalisco, editado por Juan S. Larrosa-Fuentes, 63-77. Guadalajara, México: ITESO. <https://rei.iteso.mx/handle/11117/10381>.

[83] Juan Larrosa-Fuentes. (2018). Analyzing spatialization...cit

[84] Smith Pussetto, García Vázquez & Pérez Esparza. (2008). Análisis de la ideología...cit.

[85] Juan Larrosa-Fuentes. (2018). Los periódicos...cit; María Elena Hernández Ramírez. (2010). Franquicias periodísticas...cit.

[86] María Elena Hernández Ramírez. (2010). Franquicias periodísticas...cit.

[87] Juan Larrosa-Fuentes. (2018). Los periódicos..., cit; María Elena Hernández-Ramírez. (2017). El Informador, cien años después. Medios de comunicación y derecho a la información. Jalisco, ed. Graciela Bernal Loaiza. Guadalajara, México: ITESO, Departamento de Estudios Socioculturales. 221-40.

El Siglo de Torreón

El Siglo de Torreón was founded in 1922 in Torreón, Coahuila, by a group of journalists led by Antonio de Juambelz y Bracho, who sought to create an independent newspaper that would be a “defender of the community”. Currently, El Siglo de Torreón is published by Compañía Editora de la Laguna, S.A. de C.V. Patricia González-Karg de Juambelz and Enriqueta Morales de Irazoqui are the president and vice-president, respectively, of its Board of Directors, and Antonio González-Karg de Juambelz is the publisher’s general manager. El Siglo de Torreón has an average daily circulation of 34,500 copies and runs its own [digital portal](#).

El Diario de Yucatán

First published on 31 May 1925, El Diario de Yucatán is currently operated by Grupo Megamedia. The corporate name of its publishing company is Compañía Tipográfica Yucateca, S.A. de C.V. El Diario de Yucatán is managed by Carlos Rubén Menéndez Navarrete, and has an average daily circulation of 67,500 copies and its own [website](#).

6.3 Local newspapers

There are hundreds of local print publications published in Mexico. It is highly probable that many micro-local publications, which are published in rural or highly marginalized municipalities, are not registered in the PNMI, as there are few incentives for these organizations to declare their existence. On the other hand, many local media tend to be unsustainable and short-lived, given the adverse security and economic conditions for journalism in many Mexican states.

6.4 Online news

Mexican newspapers began disseminating information in digital formats in the early 2000s. For example, Grupo Reforma began publishing digital versions of its print content in 2000, El Universal launched its online edition in 2001, and Grupo Milenio did the same in 2002.

Migration of print media to the digital environment has entered a new phase in recent years, as media companies have begun to entirely scrap their print versions and instead publish exclusively online. In 2017, for example, the local newspaper La Jornada San Luis stopped printing copies and moved its news operation entirely online. Reporte Indigo, a weekly with circulation in the three most important urban centers in the country (Monterrey, Guadalajara, and Mexico City), decided to cancel its printed edition in 2018 to become exclusively an online publication. Another example is El Occidental, a newspaper belonging to OEM, with a long journalistic tradition in the capital of the state of Jalisco, which made the decision to become a weekly; that is, to print once a week and to rely on a more robust digital edition. This digital migration is probably going to accelerate in the future.

Most journalistic organizations with a strong reputation in Mexico are the digital versions of printed newspapers with a long tradition in the Mexican news market, according to data from SCImago Media Rankings[88]. This list includes the web portals of newspapers such as El Universal, El Informador, La Jornada, El Imparcial, El Sol de México, El Diario de Yucatán, Milenio, or Reforma, to name a few. Only three media in this ranking are native digital media (15%), namely Quadratín, Animal Político and Sin Embargo (and Quadratín was discarded, as the company considers itself a news agency and not a digital media outlet). In Mexico, SCImago registered 289 digital media in 2023.

[88] For more information, see the methodological section of this project: SCImago, "SCImago Media Rankings", SCImago Media Rankings, consulted on 25 January 2023, <https://www.scimagomedia.com/>.

Table 6.3: Top 20 of digital media with high journalistic reputation in Mexico, 2023

Publication	Website	Global ranking	Score
El Universal	eluniversal.com.mx	253	67.75
El Informador	informador.mx	327	66.50
La Jornada	jornada.com.mx	363	65.75
Proceso	proceso.com.mx	574	62.50
El Imparcial	elimparcial.com	714	60.75
El Sol de México	elsoldemexico.com.mx	807	59.75
El Diario de Juárez	diario.mx	905	58.75
El Siglo de Torreón	elsiglodetorreon.com.mx	905	58.75
Diario de Yucatán	yucatan.com.mx	941	58.50
El Heraldo de México	heraldodemexico.com.mx	1,026	57.50
Quadratín	quadratin.com.mx	1,136	56.50
La Crónica de Hoy	cronica.com.mx	1,162	56.25
Milenio	milenio.com	1,187	56.00
Animal Político	animalpolitico.com	1,227	55.50
Sin Embargo	sinembargo.mx	1,273	55.00
Excélsior	excelsior.com.mx	1,332	54.50
Publímetro	publimetro.com.mx	1,359	54.25
Noreste	noroeste.com.mx	1,489	53.00
Reforma	reforma.com	1,530	52.50
El Siglo de Durango	elsiglodedurango.com.mx	1,589	52.00

Source: SCImago Media Rankings, 2023 • Created with Datawrapper

Table 6.4 Reputation ranking of digital media (top 5 digital natives), Mexico, 2023

Publication	Website	Global ranking	Score
Animal Político	animalpolitico.com	1,227	55.5
Sin Embargo	sinembargo.mx	1,273	55.0
SDP noticias	sdpnoticias.com	1,727	50.5
La Silla Rota	lasillarota.com	1,960	48.0
Aristegui Noticias	aristeguinoticias.com	2,135	46.0

Source: SCImago Media Rankings, 2023 • Created with Datawrapper

The digital media platforms with the highest consumption in Mexico are those that were already market dominant in pre-digital times, according to data from a study for Google carried out by the Reuters Institute at Oxford University[89]. The only exceptions are Aristegui Noticias, Latinus and Animal Político (18.7%), which are digital native media.

[89] Nick Newman et al. (2022). Reuters Institute Digital News Report 2022. Oxford, UK: Reuters Institute for the Study of Journalism. 124–25.

Table 6.5: Weekly use of digital media in Mexico, %, 2021

Online portal	Weekly use (%)
El Universal online	25%
TV Azteca Noticias	25%
Uno TV Noticias	22%
Televisa Noticias	22%
Aristegui Noticias	18%
Regional and local digital newspapers	18%
Imagen Noticias	16%
Reforma en línea	15%
CNN.com	14%
El Financiero en línea	12%
Radio Fórmula Noticias	11%
Latinus	11%
La Jornada en línea	11%
TV Local en línea	10%
Animal Político	10%
El Heraldo en línea	10%

Source: Reuters Institute study funded by Google, 2022 • Created with Datawrapper

Using the rankings from SCImago and Reuters Institute, we selected seven media which produce news exclusively in digital format, and which have a significant influence over the Mexican audience. These outlets are listed in chronological order, from the publication with the longest market presence to the one that was most recently founded.

La Silla Rota

La Silla Rota (meaning “the broken chair” in English) was founded in 1998 by Publicaciones Comunitarias S.A. de C.V. and Comunicación, Bienestar y Salud S.A. de C.V., publishers that also launched other digital journalistic projects such as Yo soy tú and Su médico. La Silla Rota is a digital media outlet that produces general news. It is managed by journalist Roberto Rock, and has regional editions in the states of Veracruz, Hidalgo, and Guanajuato. In SCImago’s digital reputation ranking, La Silla Rota ranks fourth among the five digital media with the best rating in Mexico.

SDP Noticias

Founded in 2004 by businessman Federico Arreola, SDP Noticias was initially a media outlet dedicated to reporting on the campaign of politician Andrés Manuel López Obrador, who ran for the presidency of Mexico in 2006, 2012, and 2018. In its first version, the publication was called El Sendero del Peje, alluding to López Obrador, who was popularly known as “el peje”. The name comes from “pejelagarto”, a fish from Obrador’s home Tabasco region. After the 2006 campaign, Arreola decided to keep the website, changed its name to SDP Noticias, and began to offer generalist news content. In 2017, Televisa bought 50% of SDP Noticias. Currently, its director is Federico Arreola and its publishers are Periódico Digital Sendero S.A. de C.V. and Grupo Televisa S.A.B. In the SCImago ranking, SDP Noticias ranks third among Mexican media.

Animal Político

The online publication Animal Político was co-founded by Daniel Eilemberg and Daniel Moreno in 2010. As of 2019, the chair of the publication’s board is businessman Gerardo Márquez Camacho[90]. Its publisher is Editorial Animal S. de L.R. Animal Político is a digital native media that describes itself as a creator of content “with rigor, accuracy and thought to serve citizens”[91]. The outlet’s sources of income include training, consulting, fact-checking (20%), commercial content (25%), advertising (20%), subscriptions (15%), and donations (20%). In the SCImago ranking, Animal Político appears in first place among born-digital media. It is in 15th place among the most consumed digital media in Mexico, according to the Reuters Institute.

[90] Gerardo Márquez. Frente a las mentiras. 23 September 2019. Animal Político. <https://www.animalpolitico.com/analisis/invitades/frente-a-las-mentiras>.

[91] Animal Político. (2023). Nosotros. <https://www.animalpolitico.com/quienes-somos>

Sin Embargo

Launched by journalist Jorge Zepeda Paterson on 6 June 2011, Sin Embargo is currently published by SinEmbargo S. de L.R. de C.V. and has a board of directors comprising Miguel Valladares, Pablo Valladares, Jorge Zepeda Patterson, Alejandro Páez Varela, and Rita Varela Mayorga. The director of Sin Embargo is Alejandro Páez Varela. In recent years, Sin Embargo has been very successful with its live broadcasts on YouTube, especially with the show titled “Los periodistas” (meaning “journalists” in English). In the SCImago digital reputation ranking, it takes second place among the top five digital natives.

Aristegui Noticias

The news portal Aristegui Noticias is led by journalist Carmen Aristegui, who runs the portal through the publisher Aristegui Noticias Network. The website was founded by Aristegui who, after a long career in radio and television, was fired in 2012 by radio network MVS for her critical coverage of the health of President Felipe Calderón Hinojosa. She then decided to launch her own digital venture. In the SCImago ranking, Aristegui Noticias ranks fifth among the born-digital media.

Latinus

The news portal Latinus was only launched in 2020, but despite its short period on the market, it has already seen significant success. The director of the portal is Carlos Loret de Mola. According to its website, Latinus is “a 100% digital platform designed to generate and distribute high-value content for consolidated Latino audiences in the United States”. However, the news they publish is mostly about Mexican politics. Their website does not specify who its owners are, nor can we find out which company is the publisher. According to journalistic reports, the co-owners of Latinus are Federico Madrazo Rojas and Alexis Nickin Gaxiola, people close to Mexican political groups[92].

El País Mexico edition

El País is a Spanish newspaper founded in 1976, which publishes general news and has a circulation that goes beyond Spain. On 17 March 2013, El País published a digital version for all of the Americas; at that time, it also opened newsrooms in Mexico and the United States, both managed by journalist Antonio Caño. In 2020, El País stopped printing newspapers in the Americas, and on 1 July of that same year launched a digital version exclusively for Mexico[93]. Although El País Mexico edition does not appear in the rankings researched for this project, its mentioning is important, as it is a digital media outlet that publishes relevant news.

[92] Álvaro Delgado Gomez. Una red de políticos prominentes y empresas (con acceso a dinero público) está detrás de Latinus. 20 March 2021. SinEmbargo MX. <https://www.sinembargo.mx/29-03-2021/3956818>

[93] Javier Moreno. Un compromiso con los mexicanos. 1 July 2020. El País, edición México. <https://elpais.com/mexico/2020-07-01/un-compromiso-con-los-mexicanos.html>

7. Sources of media financing

Media in Mexico has two main sources of financing: public funding and commercial advertising. Public financing comes from government budgets at federal, state, and municipal levels, from the three branches of the Mexican State (executive, legislative and judicial), and from autonomous bodies such as electoral institutes, transparency institutes, and human rights commissions. All these institutions finance the press through the purchase of advertising (known as official or “state” advertising) and payments for journalistic coverage[94].

The second source of financing for Mexican media is commercial advertising income. This type of financing implies, from a classic political economy perspective, the need for large audiences to whom the media markets advertising from private companies and brands[95].

In addition to these main sources of financing, some of the digital media in the country also generate resources by charging for the consumption of their journalistic content (like a paywall), as well as by selling memberships.

7.1 Public financing

The media in Mexico has been largely influenced by its historical context, developing in an earlier era. A semi-authoritarian political system dominated for more than seven decades, mainly during the 20th century, run by the Institutional Revolutionary Party (Partido Revolucionario Institucional, PRI). During those times, the media and journalists in general had little independence from the current state power, as the government was the main financier of the press. In those times it was common for journalists to receive their salaries directly from government agencies, and for the government to favor certain media through tax remissions, state subsidies, and the sale of materials at a discount, such as ink and paper. In exchange, the Mexican press was pro-government and avoided criticism of state power, being far removed from the Anglo-Saxon ideal of the press acting as a watchdog of democracy[96].

[94] There are thousands of institutions that allocate public resources to the media in Mexico. For example, there are 2,469 municipalities in the country. Presumably, all of them spend funds on official advertising. This is not including the count of all federal and state agencies.

[95] Dallas W. Smythe. (1977). Communications: Blindspot of Western Marxism. *Canadian Journal of Political and Social Theory* 1, núm. 3. 1–27.

[96] Sallie Hughes. (2006). *Newsrooms in Conflict...*, cit.; Chappell Lawson. (2002). *Building the Fourth Estate...*, cit.; Williams A. Orme. (1996). *A Culture of Collusion...*, cit.

At the end of the 1990s and during the first years of the 2000s, both the political scene and the media system in Mexico began to change. The PRI started to share power with other political forces. In addition, supposedly independent institutions were created to ensure the protection of human rights, and other rights such as electoral rights and the right to information. Moreover, journalists stopped being paid by the government, and public spending in the media became less opaque. On the other hand, media industries began to diversify as business groups emerged and expanded their media portfolios throughout the country, seeking other forms of financing. These transformations eroded the traditional model of relations between the public authorities and the press[97]. In this new era, media outlets began to be much more critical and independent of the government, although many of them maintained their official editorial lines.

The distribution of public resources to purchase advertising is one of the practices reminiscent of the past semi-authoritarian model of the relationship between the press and the public power. The main progress, in this respect, is the increased transparency of the public funding system. In the early 2000s, institutions were created to protect transparency and accountability at the federal and state levels, which allowed the public to know how much government institutions spend on official advertising.

In the six-year term of Vicente Fox (from 2000 to 2006), some MXN 16.32bn (US\$ 1.5bn at current prices) was spent by the government on advertising contracts with the media; during the administration of Felipe Calderón (from 2006 to 2012), that sum increased to MXN 38.72bn (US\$ 2.8bn); and during the mandate of Enrique Peña Nieto (2012 to 2018), some MXN 62bn (US\$ 3.1bn) was channeled to media outlets[98].

The main issue continues to be the discretionary nature of the allocation of public resources to the Mexican media. The local legislation on the matter has serious gaps. On the one hand, there is no transparent and reliable data to measure and evaluate the work of the media through metrics of readership or audiences, nor of population and geographic coverage. There is no reliable and updated directory of all Mexican media either. This information should, in theory, be used to allocate resources to the media that can serve specific populations with professional news content. Today, many media outlets receive public resources in spite of their low distribution or audience shares, or the low quality of their journalistic output. Existing laws do not allow for the creation of a mechanism for the distribution of resources that would prevent them from being concentrated within a handful of media companies.

[97] María Elena Hernández-Ramírez. (2006). La 'professionalisation' du journalisme au Mexique: le discours 'modernisateur' de Carlos Salinas de Gortari sur les relations presse-gouvernement. (These de doctorat, Paris 8) <http://www.theses.fr/2006PA082681>

[98] Fernando Camacho Servín. La Jornada: Gastó EPN en publicidad más de \$53 mil millones. 5 June 2019. La Jornada; Rubén Martín. Desenfrenado gasto oficial en publicidad. 29 June 2013. El Economista. <https://www.eleconomista.com.mx/opinion/Desenfrenado-gasto-oficial-en-publicidad-20130629-0001.html>; Rodrigo Gómez García. (2021). El sistema de medios mexicano y la publicidad oficial en el Contexto de la Cuarta transformación. Ensayos sobre comunicación gubernamental en la cuarta transformación. ¿Cambio o continuidad?, ed. Julio Juárez Gámiz. Ciudad de México: Centro de Investigaciones Interdisciplinarias en Ciencias y Humanidades, UNAM, 74. It is important to note the volatility of the exchange rate between the Mexican peso and the dollar, as the average exchange rate with Vicente Fox was MXN 12 per US\$, however the exchange rate in the last year of Enrique Peña Nieto was MXN 20.6 per US\$. At the end of 2023, the exchange rate was US\$1 to MXN 17. The figures in US\$ presented in the report take into account these fluctuations.

According to the research from Article 19 and Fundar[99], in the first three years of the premiership of Andrés Manuel López Obrador (AMLO), there was a positive change compared to the regime of Enrique Peña Nieto, as a decrease in government funding spending was detected[100]. In 2020, the second year of AMLO’s administration, a total of some MXN 2.25bn (US\$ 100.8m) was spent on official advertising, which represents one fifth of Peña Nieto’s annual expenditure. This was in line with AMLO’s promise during the electoral campaign to reduce spending in this area. However, the government has not solved the problem of discretion in the allocation of resources, with a high concentration of all advertising spending still found in a certain few media outlets[101].

Table 7.1: Top ten beneficiaries of public advertising (2019-2021)

Media outlet	Total (MXN m)	Total share, %
Grupo Televisa S.A de C.V.	933.00	10.79%
Estudios y TV Azteca S.A. de C.V.	848.75	9.81%
La Jornada, Demos, Desarrollo de Medios S.A. de C.V.	771.16	8.92%
Medios Masivos Mexicanos S.A. de C.V. (varios periódicos)	521.52	6.03%
Grupo de Radiodifusoras S.A. de C.V. (Grupo Fórmula)	322.18	3.73%
Telefórmula, S.A. de C.V.	195.25	2.26%
Centro de Cultura Nuestra América A. C.	191.78	2.22%
Organización Editorial Acuario S.A. de C.V.	186.24	2.15%
Milenio Diario S.A. de C.V.	183.78	2.12%
Edición y publicidad de medios de los Estados S. de R.L. de C.V.	171.87	1.99%
768 other outlets	4,323.22	49.99%
Total	8,648.74	100.00%

Source: Article 19, Fundar • Created with Datawrapper

[99] Article 19. (2022). En la primera mitad del sexenio persisten las malas prácticas en publicidad oficial; urge que el Congreso legisle. <https://articulo19.org/publicidad-oficial-2021/>

[100] Rodrigo Gómez. (2020). El rol del Estado en el Sistema de Medios Mexicano...cit; Rodrigo Gómez García. (2021). El sistema de medios mexicano..., cit.

[101] Rodrigo Gómez García. (2021). El sistema de medios mexicano..., cit. 75–82.

The top beneficiaries of state advertising are the two largest nationwide television stations in the country, Televisa and Televisión Azteca. Between them, they account for more than 20% of all awarded public resources. This is hardly a surprise, as during the last 30 years, these two companies have been highly favored by different Mexican governments, including the current one.

Printed newspapers are also subsidized through the state advertising policy, with La Jornada, a publication related to the current government, being the third largest recipient of state funds. This is followed by Medios Masivos Mexicanos, a company that encompasses dozens of newspapers. The eighth largest recipient of state funds is Organización Editorial Acuario, also a publisher of printed newspapers, followed in ninth place by another publisher, Milenio Diario. These newspaper publishers account for 19% of the total public advertising expenditure. Two major radio broadcasters are on the list: Grupo Fórmula and Telefórmula. On the other hand, some media that received public cash during Peña Nieto's presidency, such as Grupo Empresarial Ángeles, which runs Imagen Televisión, Organización Editorial Mexicana (OEM), El Universal and others, no longer appear among the top ten recipients.

The model of financing private media through public resources has had pernicious effects on the Mexican media^[102]. The government and public institutions often use these resources to reward those media outlets which are sympathetic to certain governments, or to punish those that are critical of them. Also, given the lack of information and regulation, it is very difficult to measure the societal benefit of this public policy. As a result of this practice, many media outlets have become dependent on state financing. A significant number of media outlets, in order to maintain this type of financing, lean towards more official journalistic coverage and a pro-government editorial agenda. In addition, historical dependence on state money has limited the effort and creativity of some media companies to experiment with alternative sources of financing. Finally, state financing has distorted the media market, as there are many media outlets that solely devote themselves to reproducing information from state agencies and publishing low quality information.

[102] Rodrigo Gómez García. (2021). El sistema de medios mexicano...cit.; Rodrigo Gómez García. (2020). El rol del Estado en el Sistema de Medios Mexicano, ...cit.

7.2 Private financing

As there are few media companies listed on the stock market, there is poor transparency over the financial performance of media outlets in Mexico. Media companies are not obliged to make their financial data public. The Covid-19 pandemic had its greatest impact on ad spending in the years 2020 and 2021. Cultural consumption habits of the population, coupled with the increased consumption of digital media to the detriment of more traditional formats, has also led to major changes in the ad spending market in Mexico.

Table 7.2: Revenues from commercial advertising sales by media

In US \$ million

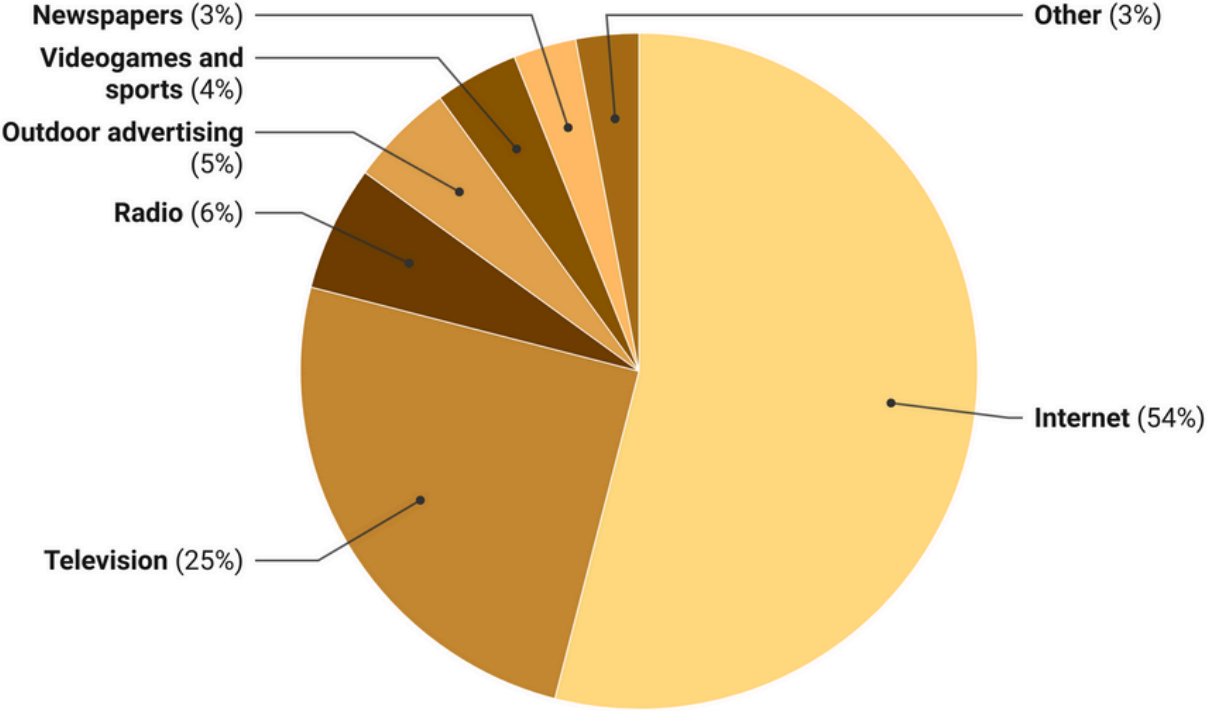
	2020	2021	2022
Print newspapers	214	203	194
Digital newspapers	16	16	17
Radio	320	359	386
Television	1,517	1,640	1,663
Internet	2,070	3,221	3,641

Source: PwC • Created with Datawrapper

The online sector claimed more than half of the ad revenue market (54%) in 2022, followed by television. Television advertising revenues have declined in recent decades, but are now seeing a more stable situation (although this does not indicate a recovery)[103]. Radio and print press, two sectors that for many years have shown a steady decline in their economic earnings from advertising sales, come last. For comparison purposes, in 2005, television had 54% of the ad market, radio 9.5%, newspapers 7.8%, and the internet 4.6%[104]. In less than two decades, television has ceased to be the largest recipient of advertising resources, while the internet went from last to first place in this ranking.

[103] Soto Galindo. Internet es el gran ganador de la pandemia. 15 July 2022. El Economista. <https://www.eleconomista.com.mx/empresas/Internet-es-el-gran-ganador-de-la-pandemia-20220715-0020.html>.
 [104] Vidal Bonifaz. Mercado mexicano de la publicidad, 2005-2014". 2 June 2015. La Rueda de la Fortuna <https://ruedadelafortuna.com.mx/2015/06/02/mercado-mexicano-de-la-publicidad-2005-2014/>.

Figure 7.1: Distribution of advertising expenditure by media sector, 2022



Source: Soto Galindo with data from PwC • Created with Datawrapper

What is striking and worrying is that two U.S. technology giants, Google (Alphabet) and Facebook (Meta), are responsible for more than 80% of digital advertising revenues in Mexico, which clearly affects the financial sustainability of the Mexican media. These monopolistic practices by Google have already caught the attention of COFECE, the institution in charge of monitoring economic competition. This situation has appeared in other countries too, and in some of them it was solved through agreements, where the tech giants agreed to share some of the revenue from their digital advertising with media content creators. However, these agreements are few and far between.



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