



Commissariaat
voor de Media

Media Monitor 2024



Executive summary

The Media Monitor reports annually on developments in the Dutch media sector, for more than 20 years. This concerns both activities of media companies as well as developments in media use. The Media Monitor is a statutory task of the Dutch Media Authority (Commissariaat voor de Media). We have a special focus on media concentration and diversity of (news)media.

[More information on the Media Monitor can be found on our website.](#)

Linear television use continues to decline in favour of social media and streaming services

Social media and streaming services are here to stay. The use of these services plays a major role in the decline in the use of traditional media, putting pressure on Dutch media markets. In 2013, the Dutch watched linear television channels for almost 3 hours a day on average, ten years later this has declined to less than 2 hours. And only a quarter of Dutch people still read a newspaper daily, compared to 40% in 2019.

Advertising revenue Dutch media sector declines

Advertising revenues in the Dutch media sector are also declining. Almost 80% of digital advertising revenue currently goes to big international players such as Google and Meta. Over the past two years, after years of increase, the share has remained stable. But the question is whether it will stay that way. International streaming services are experimenting with subscription models which include advertising. Some streaming services, such as HBO Max, have already introduced these models in the Netherlands. The big players, Netflix and Disney+, are likely to follow soon. This possibly means that advertisers will spend part of their budget on streaming services, perhaps at the expense of Dutch media companies. For users, subscription models with advertising have the advantage of making streaming services more accessible to households with limited budgets. But the question is what this will mean for the Dutch industry.

Proposed media concentration

Media companies see consolidation as a solution to the strong competition of the big international players. RTL Netherlands and Talpa Network (the two largest Dutch television broadcasters) wanted to merge in 2022, but the Dutch competition authority (ACM) did not give permission. In December 2023, DPG Media (largest (news)media company in the Netherlands) announced its intention to acquire RTL Netherlands. ACM is currently investigating its potential impact on the Dutch

media landscape. The Commissariaat advises the ACM on the impact of this merger on pluralism and news diversity. Concentration can have major risks for media pluralism and independence, but in a news media sector under pressure, there are also high risks of deterioration.

Declining use of Dutch news

We are concerned about the increased use of social media and (international) streaming services. It inherently means less use of Dutch (news)media. On social media, only a small part of the content originates from Dutch journalists. American media also dominate on the major video streaming services. Dutch (news)media can connect and inform Dutch citizens. Social media doesn't fulfil this function at the moment, due to the lack of Dutch (journalistic) content. Only if efforts are made to increase the presence and visibility of reliable journalism on these platforms, social media may be able to connect and inform Dutch citizens in the future. This requires action from both legislators and media companies.

Lack of transparency means little insight into media consumption and media diversity

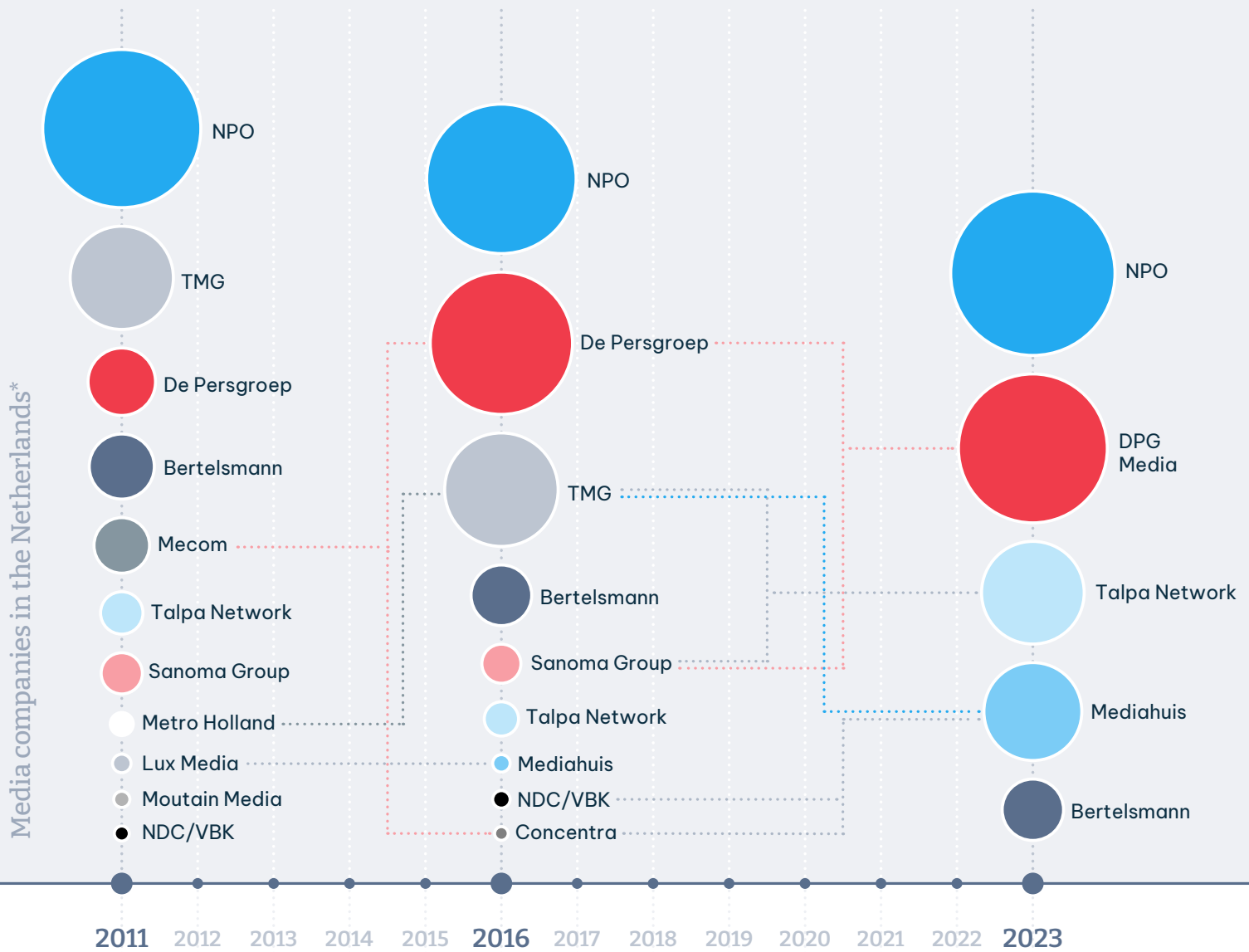
But media companies are managing a balancing act; on the one hand, they want to reach as many people as possible with their content and therefore like to have a presence on social media, but on the other hand, they don't want to be too dependent on those platforms and direct people to their own sites as much as possible. On social media, it is difficult to monetise attention and, in addition, media companies depend on the platforms for the visibility and findability of their content. The platforms' algorithms determine how much and what content reaches your audience, and most platforms offer few outlink opportunities to, for example, a news site.¹

Findability and visibility of Dutch (news)media under pressure

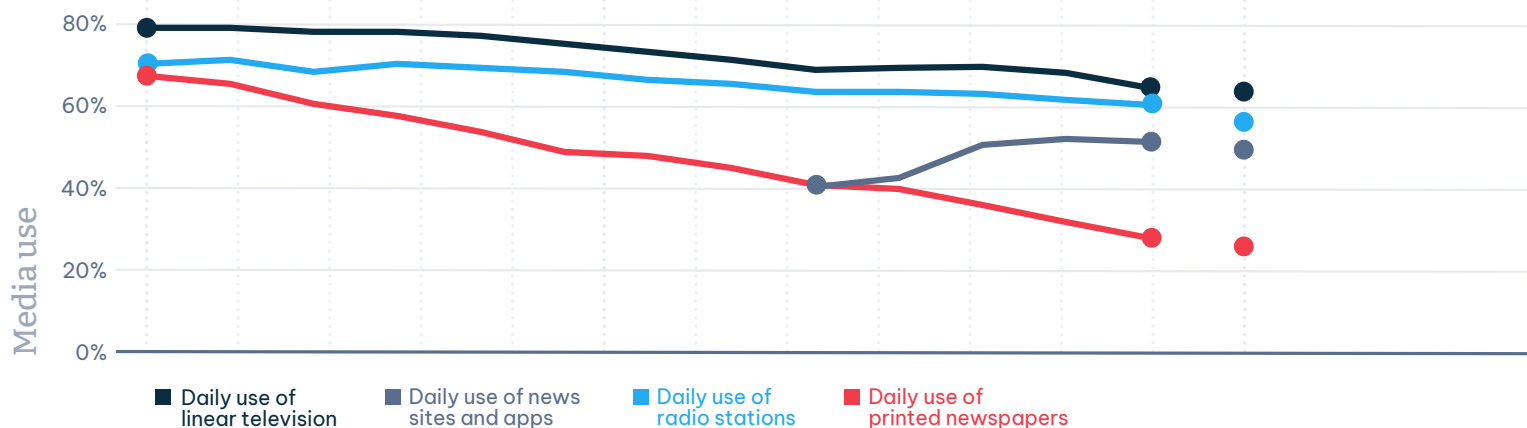
The way social media and streaming services are used is still largely unknown. Platforms offer little or no insight into exactly what users do on the platform, and algorithms show users content based on behaviour or preferences. This means that little can be said about a platform's generic usage. We don't expect that platforms will become more transparent about this without a legal obligation. It will be difficult for the Commissariaat as a regulator to get the full picture of how the Dutch use media or what media content is provided. If algorithms are steering users to more of the same, ensuring media diversity is very difficult. For now, because of our limited insight into social media use, this is an assumption.

¹ See also our recent publication about young people, social media and news: [English Media Monitor](#) (cvdm.nl)

Increasing market share with a smaller number of media companies



Use of traditional media has been declining for years. Use of online news stabilises.



* The size of the spheres is an indication based on a market share calculation.
The Media Monitor 2024 is a Dutch Media Authority (Commissariaat voor de Media) publication