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Media Concentration in Spain: National, sectorial, and regional groups[1]

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Abstract. In Spain, the media market structure is made up of very different media groups, making it necessary to identify and classify them in a clear and coherent manner. To do so, this article collects secondary information from media companies' websites and from audience measurement institutions. Results identify 50 media groups with activity in the Spanish market. They are classified into three categories according to the type of outlet, including national, sectorial, and regional. The current structure is based on recent developments in the last four decades of democracy among newspapers, magazines, radio, television and digital media.
Keywords: Media concentration; Spain; media groups; media structure; media history

[es] Concentración mediática en España: grupos nacionales, sectoriales y regionales

Resumen. La estructura de la comunicación en España está formada por muy diferentes grupos de medios, lo que hace necesario identificarlos y clasificarlos de un modo claro y racional. Para ello, este artículo recaba información secundaria de los propios sitios web de las compañías y de las instituciones de referencia para la medición de audiencias. Los resultados identifican 50 grupos de comunicación con actividad en el mercado español. Se clasifican de acuerdo al tipo de medios que incluyen en tres categorías: grupos nacionales, sectoriales y regionales. La actual estructura se explica por la evolución reciente en las últimas cuatro décadas de democracia de los diarios, revistas, radios, televisiones y medios digitales.
Palabras clave: Concentración mediática; España; grupos de comunicación; estructura de la comunicación; historia de la comunicación

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1. Introduction

In Spain, the media sector is made up of very different media groups, making it necessary to identify and classify them in a clear and coherent manner. Furthermore, its evolution since the end of the Franco regime reflects patterns of both continuity and change. Academic research has paid considerable attention throughout the intervening decades to the progressive phenomenon of media concentration and the creation of multimedia groups, which were practically non-existent as such before the regime change. A brief review of the main studies that have looked into these issues in Spain can be found below.

Vázquez Montalbán (1975) reviewed the media's situation at the zenith of Francoism, although his classic book had two previous editions, in 1963 and 1971. In the third one, months before political transition commenced, he offers an overview of the Spanish press, radio and television. He recounts that these sectors were experiencing very different situations at the time: "Free enterprise in the written press, a concession system for radio (concomitant with state radio) and a state monopoly in television" (1975: 157). For newspapers, he distinguishes between the parastatal sector associated with the generally unprofitable Prensa del Movimiento, and the private sector, in which he highlights ABC, La Vanguardia and Editorial Católica and their connections with large Spanish companies and banks. The latter sector's joint circulation was very low, with 71 copies per thousand inhabitants, compared to more than 500

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in other large European countries (1975: 157-163). In line with their ownership, there were five types of broadcasters and stations on radio, including the State (Radio Nacional de España – National Radio of Spain), the Movement (REM and CAR), a trade union organization (CES), the Church (COPE) and private ones (the majority affiliated with SER) (1975: 168-169). On television, however, the state had a total monopoly with the two TVE networks under government control. In this case, there were 132 televisions per thousand inhabitants, a number similar to that of neighboring countries (1975: 173). For this reason, Vázquez Montalbán highlights the role of television in the Francoist media industry, saying,

> Information in Spain has been particularly sensitive to the new state of affairs conditioned by the mass arrival of TV. The low rate of a press reading public in the country (conditioned by the political sluggishness of post-war journalism and by cultural laziness corresponding to survival-based social relations) was very seriously affected by the regime with an omnipresent, uniform information media, which was especially present on TV (1975: 174).

This pioneering text found a follow-up in Bustamante (1982), who similarly identified media owners in each communication sector, criticizing progressive privatization and the public sector's declining influence. In the same decade, Díaz Nosty's (1989) annual media report was first published, which lasted for thirteen years. At the beginning of the 1990s, Nieto, Soria, and Giner (1990) offered an alternative analysis at a new time of change, which emerged after a "long and difficult path to liberalization" (1990: 34). This report focused on all the media industries at the time, including the daily press, magazines, the publishing sector, advertising, private radio, state and regional radio television, budding private television and even film, video and an innovative chapter on electronic information. By then, media groups started being configured as such; yet, at the time, they were basically just newspaper editors, as shown in Table 1.

Table 1. Daily newspaper publishing groups (1988).

Group	Newspaper	City	Circulation
Prisa	El País	Madrid	376,230
	Cinco Días	Madrid	
Comecosa	El Correo Español	Bilbao	125,555
	El Diario Vasco	San Sebastián	83,826
	El Diario Montañés	Santander	25,899
	Ideal	Granada	25,561
	Hoy	Badajoz	18,476
	La Verdad	Murcia	38,307
Prensa Española	ABC	Madrid	267,772
Godó	La Vanguardia	Barcelona	201,015
	El Mundo Deportivo	Barcelona	57,030
Zeta	El Periódico de Catalunya	Barcelona	157,192
	Diari de Barcelona	Barcelona	13,674
	El Periódico-La Voz de Asturias	Oviedo	
	El Periódico-Extremadura	Cáceres	4,723
Grupo 16	Diario 16	Madrid	139,956
Prensa Ibérica	Diario de Las Palmas	Las Palmas de Gran Canaria	11,664
	La Provincia	Las Palmas de Gran Canaria	32,746
	La Nueva España	Oviedo	36,584
	Información	Alicante	30,979
	Levante	Valencia	33,648
	El Faro de Vigo	Vigo	32,227
	La Opinión	Murcia	

Source: Authors' elaboration based on Nieto, Soria and Giner (1990: 249-260).

In addition to these seven medium-sized groups, arranged in circulation order, other national dailies also existed, but had fallen into disrepair, including Ya (Editorial Católica) and sports coverage such as As and Marca (then owned by Recoletos). The regional newspapers that dominated included La Voz de Galicia, Las Provincias (Valencia), Deia (Basque Country), Heraldo de Aragón, Diario de Navarra and smaller local groups such as Joly (Cádiz), Leoncio Rodríguez (Tenerife), Serra (Balearic Islands) and La Región (Orense) (1990: 249-260). The 1980s were also the heyday of newsmagazines, such as Interviú and Tiempo (both from the Zeta group) and Cambio 16, Época, Panorama and Tribuna. Likewise, other non-daily publications exceeded a circulation of 300,000, including celebrities' magazines like Pronto, Hola, Diez Minutos, Lecturas y Semana, as well as television publications like Teleprograma, Teleindiscreta or Clan TV (1990: 250).

At the end of the 1980s, the communication structure in Spain began to incorporate more radio and television companies, which were progressively liberalized. The 1978 National Technical Plan awarded the private sector more than a hundred medium-wave stations, but the real explosion came in 1989, when more than two thousand FM stations were licensed to public and private channels. New national stations appeared, such as Antena 3 (Godó group), which quickly joined top stations like SER, Cope and Rato (1990: 141). Public service broadcasting was also reinforced with the creation of regional corporations in the most populated regions, including Andalusia, Catalonia, Madrid, Valencia, Galicia and the Basque Country. Thus, the Spanish government's monopoly on television was split up with the emergence of the first regional broadcasters and with experiments in private television, although this process did not reach its peak until the 1990 release of Antena 3, Canal Plus and Telecinco.

At the beginning of the 1990s, Sánchez-Tabernero (1993: 63-72) identified 119 Spanish newspapers that distributed 2.5 million copies in 1975; he found similar figures in 1990 with 128 newspapers and 2.7 million copies. Copies per thousand inhabitants were still as low as before, with 75 and 74. However, other media grew exponentially: radio went from 7 to 15 million listeners per day and television went from 19 to 27 million daily viewers. Already in 1990, the television structure was dually consolidated with two national public channels from TVE and the six regional ones, on the one hand; and the three private ones, on the other. One of them offered both free and paid broadcasts, which is why Canal Plus inaugurated these services in Spain. The largest media groups also shifted substantially: in 1975, they included the Prensa del Movimiento, Editorial Católica and Prensa Española; in 1990 they shifted to Comecosa (later Correo), Prisa and Godó groups (Sánchez-Tabernero, 1993: 99). A substantial transformation had taken place with the creation of multimedia groups. By then, Godó had already launched its radio and later television network, called Antena 3; Prisa took control of SER and launched Canal Plus with its French partners; and Correo invested in Telecinco's somewhat later. This growing consolidation and subsequent concentration was first measured in 1990: the largest press group (Correo) accounted for 15.3% of total newspaper circulation; the largest radio station (SER) had 38% of the audience and, on television, TVE still had 56% of reception time despite the breakdown of its monopoly and the presence of regional public and private channels (Sánchez-Tabernero, 1993: 131-135).

In the 1990s, other contributions, such as that of Reig (1998), were published. For their part, Núñez de Prado and Martín Díez (1996: 155-156) were the first to distinguish three types of media groups: family firms with a long history (such as Correo, Prensa Española, Godó or Prensa Ibérica); those recently created with the regime change (Prisa, Unidad Editorial, Zeta or 16 groups); and those that were created by an entity outside the media (such as the ONCE group). Jones (2007) applied a classification taking into account their geographical origin (Madrid, Catalonia or foreign countries) as well as its ties to radio and television. García Santamaría (2016: 198) defines five types of media groups according to their "anchors" to different media industries: television, press, radio, telecommunications and audiovisual services.

By the year 2000, the number of daily newspapers increased to 140 and their joint circulation reached four million copies. Prisa began to lead the sector with a 15% share, but the 2001 merger between Correo and Prensa Española brought the new group's sale of copies to 20% of the indystry. Recoletos, publisher of Marca and Expansión, began to lead the sports and economic press, receiving foreign capital from the British investor Pearson. Daily radio listeners rose from 15 to 18 million and SER consolidated its leadership, with 41% of audience share, followed by COPE with 22%. Daily television consumers increased to 30 million, and TVE had 32% of the audience, compared to 22% for Telecinco, which became the most profitable private television network in Europe (Sánchez-Tabernero & Carvajal, 2002: 45-74).

The Internet was then a tangible reality, but portals still controlled most of the traffic. In Spain, Terra, owned by Telefónica, was dominant at first, but the explosion of Google at the turn of the century brought about an industry-wide paradigm shift. It also brought about new sectorial reports, including the Telecommunications Market Commission's (CMT, 1999) annual report, which occasionally covered media groups (Palacio, 2005) and which is still published to this day; the white paper on the daily press, edited by Bel, Benito, De Toro and Jiménez (2001), which lasted until 2018; a report on television in Spain, coordinated by Artero, Bel, De Toro and Sánchez-Tabernero (2007) until 2013; and an annual report on the journalistic profession edited by Díaz Nosty and Farias (2004), which is still in print.

Almirón (2009) offers an overview of the main media groups' structure and finances at that time. Arrese, Artero and Herrero (2009: 19) contend that the communications industry in Spain has undergone profound transformations that can be divided into two different periods. Between 1975 and 1999, legal developments took place that allowed for change on three levels: namely from censorship to freedom of expression; from the leading role of state media to that of private media; and from centralization to decentralization of information policies. Starting in 1990, the sector began to develop a business strategy with the creation of large and medium-sized multimedia groups. From 2000 onward, this process was fully consolidated. Artero (2010: 185-187) identifies by then 60 media groups in Spain divided into three types, namely national, sectorial and regional. Only 13 of them accumulated more than 10% of gross audience share. At that time, groups with center-left political leanings had an aggregate gross audience of 194% (Prisa, Zeta, Mediapro, Telecinco and RTVE), while those on the center-right (Planeta, Vocento, Unidad Editorial, Godó and Cope) maintained an aggregate share of 130% (2010: 199).

Similarly, Reig (2011: 209) found that media outlets that were part of Prisa, Mediapro and RTVE leaned towards the Socialist Party, while Unidad Editorial, Cope, Planeta and Vocento leaned towards the People's Party. This author also offers a detailed description of each group's owners, history and media, including, in addition to those mentioned above, Telefónica, Zeta, Godó, Prensa Ibérica, Voz, Joly, Promecal, Intereconomía and RBA (2011: 211-248). García Santamaría (2013) evaluates the weaknesses and viability of the groups at that time. Table 2 (below) organizes data from Noam and Mutter (2016) on the power indices and total media market share associated with the main Spanish media groups in 2004 and 2012.

Table 2. The main media groups in Spain (2004 and 2012).

	2004		2012	
	Power index	Total share	Power index	Total share
Prisa	612	13.9%	296.1	11.2
Google	64.2	0.7%	401.3	4.2%
RTVE	189.3	7.1%	85.3	4.8%
Planeta	126	7.7%	181	8.8%
Mediaset	117	5.8%	181.3	6.8%
Vocento	71	3.8%	59.2	3.4%
FORTA	73	4.1%	22	2.2%
RCS	15	2.2%	57	4.0%
RBA	31	2.1%	31.2	2.0%
Zeta	24.5	2.9%	24.7	2.8%
Godó	11.8	1.6%	13.2	1.6%
Anaya	9.1	1.1%	11.8	1.2%
Ono	2.2	0.3%	27	1.3%
Motorpress	5.9	0.9%	12.1	1.2%
Factoría de Canales	0	0	5.6	0.8%
Liberty Media	6.4	0.9%	4.8	0.8%
Bouygues	0.6	0.3%	0.3	0.2%
Public company		11.2%		7.1%
Foreign company		19.3%		29.9%
Media share C4		60.3%		61.3%
Media share HHI		1.532		1,606
Media share C1		25%		25%
National power index		1,470		1,607

Source: Noam and Mutter (2016: 334-335).

The power index measure corresponds to a company's total market share (squared) in the various industries in which it operates weighted by the size of each industry. On the other hand, the total market share reflects, based on 100, each group's command of the public's attention. Comparison between 2004 and 2012 reveals some structural changes in communication. Groups such as Prisa, RTVE, Vocento and the regional radio-television groups associated with FORTA lost social influence, while others, such as Google, Planeta, RCS (Unidad Editorial) and Godó gained in that respect. Overall, public ownership decreased from 11% to 7%, while foreign ownership rose from 19% to 29%. On average, the market leader within each industry tends to have a 25% share and the first four add up to 60%.

Along the same lines, Artero and Sánchez-Tabernero (2015: 330-332) found that, between 1984 and 2012, media concentration in Spain increased by double or even triple in industries like newspapers, magazines and digital media, although in 2012, the latter's levels were still moderate. However, market shares associated with radio and free-to-air television decreased slightly, still reaching a moderate to high level. Finally, Artero, Pérez Serrano and Segura (2018: 34-40) define market structures in each industry according to 2016 data.

From a national market perspective, they conclude that newspapers, magazines and digital media are part of a very broad oligopoly of about ten competitors in each industry, which has been fairly stable over the years. The audiovisual sectors have a stricter and reduced national oligopoly. On the one hand, Prisa, Cope, Atresmedia and RTVE are the strongest radio groups, as shown by Guerrero (2020). On the other hand, Mediaset, Atresmedia and RTVE are also by far the biggest free-to-air television groups. That demonstrated having an impact on programming, according to Sotelo, Sierra and Cabezuelo (2020). A dual structure can also be identified over the five industries– a few large competitors consistently occupy the top slots (oligopoly), while a few smaller competitors remain in the bottom slots (monopolistic competition).

As seen in this brief review, academic researchers have paid significant attention to media consolidation and concentration in the Spanish market, in parallel with the changes taking place in the communication industry that have affected the digital positioning of media groups, as shown by Lopezosa, Codina, López-García, and Corbella-Cordomi (2020). In general, critical, essay-based studies have predominated over quantitative-based ones, although the latter have increased in recent years. In the sections that follow, this article will identify and classify the main media groups currently competing in Spain. Section 2 explains the methodology employed, which is descriptive and historical in nature. Section 3 presents the results, classifying 50 media groups according to their primary medium. Finally, sections 4 and 5 offer a discussion of and conclusions to this research.

2. Sources and Methodology

This article takes a more descriptive and historical approach, rather than one of quantitative measurement. It aims to update the map of active media groups in Spain in a transversal way, rather than to look at media groups' concentration shares within each industry. When pairing media groups with their parent company, a brief explanation of their historical development and political leanings will be provided. This article answers the following research question: Which media groups are currently relevant in Spain and how are they classified? We hypothesize that there are patterns of both continuity and change, and that classification into national, sectorial and regional groups (Artero, 2010) continues to be appropriate.

To complete an initial list of media groups, we start with the media audience guide audited by the General Media Study (GMS) (AIMC, 2020) with 2019 data. In this edition, the data establish important differences between the industries included in this piece of research: newspapers (21.7% of the population aged 14 and over at a rate of 7.8 minutes per day per person); magazines (29.4% and 1.5 minutes); radio (56.9% and 97.3 minutes); television (85.4% and 212.9 minutes); and the internet (83.9% and 161.2 minutes) (AIMC, 2020: 11-12). These sectors are included, while others, such as cinema, for-pay video or external medium, have been excluded because this article focuses on predominantly news-journalistic media, rather than on entertainment or marketing industries. The sample is equal to the universe of media outlets included at the GMS in 2020. The industry categories applied are those officially recognized by this reference institution. It can be justified that the GMS audits barely all relevant media outlets with important audiences in Spain.

The number of media outlets reflected in the GMS's general framework with data available for 2019 is highly variable depending on the sector: 63 fee-based newspapers, 84 magazines (12 weekly, 2 biweekly, 62 monthly and 8 bi-monthly), 40 radio networks (13 general and 27 thematic), 40 television channels (4 national, 12 thematic, 18 regional public and 6 private), and 30 internet sites. In total, there are 217 units of analysis, but this figure requires some additional adjustments. On the one hand, units that fall outside of the scope media as such (like YouTube or Facebook) must be excluded. This is also the case of newspapers, magazines, and radio and televisions stations that are too local or thematic and therefore less relevant to and outside of the main groups. On the other hand, other media outlets that do not appear in the GMS, but are undoubtedly relevant here must be added. This is the case of Mediaset España channels, which withdrew from that study in 2015, or of new digital native newspapers that Comscore audits and that have several million unique users. Thus, a list of 50 sufficiently relevant media groups is included, which firstly come up by aggregating ownership connections of all considered media outlets. Once that aggregation is done, the resulting groups have been classified into national, sectorial and regional categories according to the media outlets they include, as shown in the next section.

3. Results development

3.1. National media groups

Table 3 includes media groups considered national, as based on their media scope. The following delves into their ownership, their political leanings and, broadly speaking, the processes by which they acquired their current outlets.

Table 3. National media groups (2020).

	Newspapers	Magazines	Radio	Television
Planeta	La Razón [Planeta editorial group]	Interiores, Objetivo Bienestar, Año Cero, Historia de España and el Mundo	Onda Cero, Europa FM, Melodía FM	Antena 3, La Sexta, Neox, Nova, Mega, Atreseries
Prisa	El País, As, Cinco Días, El Huffpost [Santillana editorial group]	Babelia, Buena Vida, El Comidista, El Viajero, El País Semanal, El País Viajes, El Motor, Icon, Planeta Futuro, Verne, Retina, S Moda, MeriStation	Ser, Los 40, Los 40 Classic, Los 40 Dance, Dial, Radiolé, Ke Buena	
Vocento	ABC, El Correo, Diario Vasco, Diario Montañés, El Comercio, La Rioja, El Norte de Castilla, Las Provincias, La Verdad, Hoy, Ideal, Sur, La Voz de Cádiz	XL Semanal, Mujer Hoy, Corazón TVE, Código Único, Nylon, Infoempleo, Autocasión	[Cope]	Net TV [Paramount Channel] [Disney Channel] Veralia
Unidad Editorial	El Mundo, Marca, Expansión, Estadio Deportivo, Diario Médico, Correo Farmacéutico [Editorial La Esfera de los Libros]	El Cultural, EME, Metrópoli, Yo Dona, Actualidad Económica, Telva, Fuera de Serie, Marca Motor, Másterpasatiempos	Radio Marca	Veo TV [Discovery Max] [Gol]
Mediaset				Telecinco, Cuatro, FDF, Divinity, Boing, Energy, BeMad
RTVE			Radio Nacionall, Radio 3, Radio 4 (Cataluña), Radio 5, Radio Clásica, Radio Exterior	La 1, La 2, 24 horas, Clan TV, Teledeporte, TVE Internacional
Cope			Cope, Cadena 100, Rock FM, Megastar FM	Trece TV
Prensa Ibérica [Zeta incluido]	Levante-EMV, Información, La Nueva España, El Faro de Vigo, Diari de Girona, Diario de Mallorca, Diario de Ibiza, La Provincia-Diario de Las Palmas, El Día de Tenerife, Superdeporte, Regió 7, La Opinión de (A Coruña, Málaga, Murcia, Zamora) [El Periódico de Cataluña, Sport, Diario La Grada, El Periódico de Aragón, Mediterráneo, El Periódico Extremadura, La Crónica de Badajoz, Córdoba]	Magazine, Empordà, Mallorca Zeitung [Cuore, Rumore, Stilo, Woman, Viajar, Autohebdo Sport, Digital Camera, Port Magazine, Cartoon Network, Disney Channel, Neox Kidz, Urban, Fashion&Arts Magazine]	Radio Levante	Levante TV Información TV
Godó	La Vanguardia, Mundo Deportivo	Magazine, Vanguardia Dossier	RAC 1, RAC 105	8TV, Veranda TV
Henneo	20 minutos, Heraldo de Aragón, Diario del Alto Aragón, La Información	Cinemanía	Radio Zaragoza, Radio Huesca	Huesca Televisión, CHIP Audiovisual, Factoría Plural

Source: Authors' elaboration based on company websites.

The Planeta group is the world's leading Spanish-language book publisher. A family owned firm, it is currently managed by the third generation. Its founder, José Manuel Lara, made his fortune after the Franco regime with the sale of consumer books and the progressive acquisition of new publishing labels. The well-known Planeta award also contributed to its expansion from very early on. The Lara family became part of the media in the 1990s with the launch of La Razón, the fourth national generalist newspaper with conservative leanings, and its subsequent takeover of Antena 3 Televisión, today called Atresmedia group. Its shareholder control over the audiovisual conglomerate makes it perhaps the media group with the largest joint audience. Its merger with La Sexta made it a sizeable audiovisual group despite being seen as part of the Spanish left, in clear contrast to the rest of its media properties in the press, radio and television.

The Prisa group has traditionally been a company of reference in the Spanish media market and more specifically in its progressive segment. Its founder, Jesús Polanco, also started out in the publishing world during the Franco regime working on a school book with the Santillana publishing house. As democracy advanced, he progressively took control of the new newspaper El País, which soon began to lead the field. After the Socialist Workers' Party came to power in 1982, Prisa's influence grew considerably. First, it acquired the SER chain, owned by the lone Francoist party. Later, the government allowed it to absorb Antena 3 de Radio, originally launched by the Godó group and its greatest rival on the airwaves. Later, it was granted the only, groundbreaking private, fee-based television license, Canal Plus, which it acquired together with its French partners.

From there, Prisa launched its digital satellite platform, Digital Plus, which it ultimately sold to Telefónica to reduce substantial debt. It also obtained the reconversion of Cuatro's license, which it sold to Telecinco to form Mediaset España. Along with all these developments in the national market and with support from PSOE governments, Prisa ambitiously expanded in Latin America, positioning itself as the first Spanish radio group in the world. Prisa's financial problems forced it to accept capital from investors like Nicolas Berggruen and from banks such as Santander, which reduced the influence of the Polanco family's second generation. The necessary sales of Digital Plus and Cuatro have excluded the group from television and therefore diminished its social influence, which nonetheless remains strong in the written press and radio. The reasons behind the loss of its audiovisual division are the huge debt and other mistaken strategic decisions, according to García-Santamaría, Pérez-Serrano and Alcolea-Díaz (2019). A deeper account of the development of this media group can be found at Albornoz, Segovia and Almirón (2020).

The Vocento group was created after transition to democracy, starting with Vizcaya's conservative newspaper, El Correo Español-El Pueblo Vasco. From there, various land-owning families of the Neguri aristocracy began creating a chain with the purchase of leading local newspapers in the provinces of Guipúzcoa, Cantabria, Asturias, La Rioja, Valladolid, Valencia, Murcia, Badajoz, Granada, Málaga and Cádiz. At that point, the Correo group became Vocento after merging with Prensa Española, the publisher of ABC, the conservative and monarchy-favoring newspaper of reference in Spain during the last century. In this way, the original Basque family (to a greater extent) and the Madrid-based Luca de Tena family began to distribute shares. At one point, Vocento had greater audiovisual presence with its participation in Telecinco, which it abandoned when it became Mediaset España and an Italian group associated with the Berlusconi family took full control over its operations in Spain. Today, Vocento only maintains a minority stake in the Cope network and has two licenses for free-to-air national digital terrestrial television (DTT), which it rents out to the Paramount and Disney channels and which it obtained during the first administration of the People's Party. The integration of ABC into Vocento group has been studied in depth by Toribio (2017), as well as Pérez-Serrano and García-Santamaría (2018) have highlighted the limitations of its regional press strategy.

Journalist Pedro J. Ramírez founded Unidad Editorial in 1989 after Ramírez had been expelled from the leadership of Diario 16 due to pressure from the socialist government. From there, he launched the newspaper El Mundo, which soon filled liberalism's political and commercial space. This newspaper is known for its antagonism against corruption during the first PSOE administration. Its financial position was strengthened when the Italian group Rizzoli-Corriere della Sera (RCS) invested in Unidad Editorial. Then came the Recoletos group's onerous acquisition in which several individual investors together bought the leading newspapers specialized in sports (Marca) and economics (Expansión). Like Vocento, it received two DTT licenses during a government led by the People's Party, but has not developed its own projects and rather rents them to the Discovery and Gol channels. RCS took greater control of its subsidiary in Spain with the departure of Ramírez, who later launched the digital newspaper El Español. The beginnings of Unidad Editorial were studied by García-Alonso (2002).

Like RCS, the Italian group Mediaset has long been involved in the Spanish media market. In 1990, it received one of three private television licenses and launched Telecinco. The socialist government awarded this channel to Silvio Berlusconi because of his proximity to the Italian socialist party. Paradoxically, later Berlusconi twice became Prime Minister under a center-right coalition. Although Mediaset was always the majority shareholder, it initially had leading Spanish partners with ONCE and then later the Correo-Vocento group. Mediaset España's reconversion to a large audiovisual group took place with digital transition to DTT and the purchase of Cuatro from the Prisa group. Thus, it currently has two major channels, namely Telecinco and Cuatro, and another five national licenses for niche stations. The first fifteen years of Mediaset in the Spanish media market where researched by Artero (2007).

The RTVE group began in the midst of the Franco regime when, in 1958, the dictatorship launched Televisión Española, although Radio Nacional de España had already been around for years. In its six decades, RTVE has never been able to escape the influence of the government in power. Televisión Española had a monopoly in television until the emergence of regional networks in the 1980s and private ones in the 1990s. Constant competition has radically diminished its social influence, although it continues to be one of the three major audiovisual groups. It currently receives most of its financing from public funds and continues to raise questions based both on its financial (mis)management (the state has had to absorb its debt) and on its possible political bias. To this day, it runs six radio channels and another six television networks that have also adapted to the digital environment, as shown by Medina and Ojer (2011).

The Cope group dates back to the Franco regime as a non-profit radio movement that Catholic parishes promoted as part of the Cadena de Ondas Populares Españolas (COPE). Like its historical rivals Radio Nacional (which belonged to the State) and SER (owned by the Movement), it survived democratic transition. Its majority shareholder continues to be the Spanish Episcopal Conference. In addition to being the second radio station in Spain and three musical radio shows, it has the national DTT concession for Trece TV, which has become an important part of conservative political opinion.

The Barcelona-based, Aragonese businessman Javier Moll founded the Prensa Ibérica group at the dawn of democracy. Similarly to Vocento, it began building a chain of local newspapers with acquisitions and launches in the autonomous communities of Catalonia, Valencia, the Balearic Islands, Galicia and the Canary Islands. Its recent purchase of the Zeta group has given it greater access to the Catalan, Aragonese and Extremaduran markets, where it has leading newspapers on the left. Zeta was founded by Antonio Asensio from the Interviú magazine, which, during transition, became the best-selling magazine in Spain. He soon launched El Periódico de Cataluña and other similar regional initiatives. Asensio once managed Antena 3 Televisión, but debt forced him to sell it to Telefonica. Once out of the audiovisual world, Zeta newspapers and magazines began languishing until Prensa Ibérica acquired them. The newly merged group's presence on radio and television continues to be symbolic.

The Godó group is under the ownership of the Catalan count Javier Godó. Its leading newspaper, La Vanguardia, also originated in the Franco era. During the 1980s, it aspired to become a great national multimedia group and launched both Antena 3 de Radio and its namesake on television. However, it quickly sold both to its greatest rivals at the time, Prisa and Zeta respectively. Since then, it has become associated with the Catalan center-right, both pro-independence and constitutionalist movement, with its regional newspaper, radio and television. The arrival of the Internet has given it national prominence due to La Vanguardia's digital success beyond Catalonia.

The Henneo group is a family firm and took part in the founding of Heraldo de Aragón, a liberal newspaper in that region, 125 years ago. Since then, it has survived all the political regimes that Spain and the Aragonese community have passed through. The Yarza family has only in recent years demonstrated national ambitions with the acquisition of media such as 20 Minutos and La Información, leaders in their segments of general and economic information on the Internet. It also maintains other more local operations on radio, television and audiovisual production, as well as the technology consulting firm Hiberus.

3.2. Sectorial media groups

Table 4 (below) lists the sectorial groups that this study has identified; they have a central presence in an industry, but cannot be considered multimedia. A brief history of each group is offered, explaining their owners' background, their political leanings and how they were founded. These are mostly digital native groups and magazines. The former tend to adopt a very marked editorial line as a positioning strategy, while the latter are thematically, rather than politically, geared publications focused. Just to clarify: some of these business entities cannot be plenty considered media groups, but rather individual media companies, especially those focused on a single news website. But given that most of them include more than just one media outlet, the media group category has been applied to them all.

Pedro J. Ramírez launched El Español and its economic section Invertia after his departure from the newspaper El Mundo. It generally leans left. El Confidencial, originally founded by journalist Jesús Cacho, shares a similar background, but is now controlled by other individual shareholders. Likewise, Eduardo Inda promoted OK Diario after leaving the Unidad Editorial group, although the latter maintains a more liberal-conservative news line and has a less rigorous editorial model than the previous ones. On the other hand, American technology companies Verizon and Microsoft also offer news services that attract significant audiences in Spain, such as Yahoo News and MSN Noticias.

There are seven large groups that specialize in magazine publishing. The two market leaders are Hearst (American) and RBA (Spanish). The former has magazines in many industry segments, such as celebrity news (Diez Minutos, ¡Qué me dices!), female lifestyle (Cosmopolitan, Elle), television (Supertele, TP) and home (Casa Diez, Mi Casa), in addition to the economic themed publication Emprendedores and the current Esquire format. The RBA group is a family-based, Spanish property that grew significantly when it acquired the Swiss Edipresse publications. It has segments in celebrity news (Lecturas, Semana), home (El Mueble, Arquitectura y Diseño), psychology (Cuerpo y Mente, Mente Sana) and sewing (Labores del Hogar, Patrones). It also exclusively edits the various versions of American National Geographic in Spain. G + J is the magazine division of the German Bertelsmann group, which in Spain publishes the informative magazine Muy Interesante and the female lifestyle magazine Marie Claire. Also from Germany, Springer publishes motor magazines (Auto Bild) and computer science ones (Computer Hoy). The American group Conde Nast-Advance Publications is under the ownership of the American Newhouse family. They publish the Spanish editions of a variety of their magazines, including Architectural Digest, Glamor, GG, Vanity Fair and Vogue. Finally, two single-product Spanish companies sell many copies of their magazines. Hola is the large-format celebrity magazine with editions in several countries and owned by the Sánchez-Junco family. Pronto is its lower-mid-range counterpoint, but is the best-selling magazine in Spain.

Table 4. Sectorial media groups (2020).

El Español	El Español, Invertia
Titania	El Confidencial, Cotizalia
OK Diario	OK Diario
El Diario	El Diario
Economía Digital	Finanzas, Economía Digital, Diario Gol, Cerodosbe, Inversión
Verizon Media	Yahoo [News, Finance, Entertainment, Sports]
Microsoft	MSN Noticias
Hearst	Car and Driver, Casa Diez, Cocina Diez, Cosmopolitan, De Viajes, Diez Minutos, Elle, Elle Decoration, Elle Gourmet, Emprendedores, Esquire, Fotogramas, Harper's Bazaar, Men's Health, Mi Casa, Nuevo Estilo, ¡Qué me dices!, Runners, Supertele, Telenovela, TP, Women's Health
RBA	Lecturas (various), Semana, El Mueble, Saber vivir, National Geographic (varias), In Style, El Jueves, Clara, Arquitectura y Diseño, Cosas de casa, Casas de campo, Saber cocinar TVE, Speak Up, Saber Vivir TVE, Cuerpo y Mente, Mente Sana, Labores del Hogar, Patrones
G+J (Bertelsmann)	Muy Interesante, Muy Negocios & Economía, Muy Historia, Muy Mascotas, Marie Claire, Mía, Ser padres, Delooks, Beef
Axel Springer	Auto Bild, Computer Hoy, Hobby Consolas, Retro Gamer, Top Gear
Condé Nast	Architectural Digest, Glamour, GQ, Condé Nast Traveller, Vanity Fair, Vogue
Hola	Hola (editions in eight countries), Hello (editions in eleven countries)
Heres	Pronto
Kiss	Kiss FM, Hit FM, DKiss
Secuoya	Ten, Secuoya Studios
Libertad Digital	Libertad Digital, Esradio, Libertad Digital TV
Intereconomía	La Gaceta, Radio Intereconomía, Radio Inter, El Toro TV

Source: Authors' elaboration based on company websites.

Finally, the sectorial groups are completed with some medium-sized companies in the audiovisual world. The Kiss group was founded by the Asturian businessman Blas Herrero, when the PSOE political party stopped managing several radio stations and he took over them. Today, it has two music radio stations (Kiss FM and Hit FM) and one national DTT (DKiss). The production company Secuoya is owned by several shareholders associated with the People's Party and recently obtained another DTT license through which it broadcasts its entertainment channel Ten. Libertad Digital was a pioneering website founded by the liberal Aragonese journalist Federico Jiménez Losantos, from which he articulated his own station, Esradio, after his departure from Cope. Intereconomía is a small, conservative group launched by Julio Ariza from Navarra. It started with a radio station of the same name, which also manages other operations on the Internet and television, where it once broadcast on national DTT under the same brand, but today corresponds to the more local station El Toro TV.

3.3. Regional media groups

Finally, Table 5 (below) includes media groups with activity in only one or a few autonomous communities. A brief history of each group is outlined, delving into its owners, ideology and creation process.

Private regional media groups are usually family owned and focus on their own autonomous community or, at most, a neighboring one. The Joly group has always remained within the limits of Andalusia and began with Diario de Cádiz, although its most important publication today is Diario de Sevilla. It is closely associated with the Socialist Workers'

Party, which long governed that autonomous community until the most recent elections. Promecal started with Diario de Burgos and has other head offices in the two Castiles, generally under the brands El Día (in Castilla y León) and La Tribuna (in Castilla-La Mancha), as well as private television networks in Castilla y León and Navarra. The Serra group publishes several publications in the Balearic Islands starting with the newspaper Ultima Hora, as does the publishing group of La Voz de Galicia, the leading newspaper in that autonomous community. These last three companies display more center-right leanings. This is also the case of the La Información group, which publishes Diario de Navarra. However, other groups maintain more independent leanings, for example Hermes in Catalonia (which publishes El Punt Avui) and Noticias en el País Vasco (which publishes one newspaper in each Basque province and another in Navarra called Diario de Noticias). Other local groups, such as Edigrup (Castilla y León) and Inforcasa (Canary Islands), maintain more centrist leanings.

Table 5. Regional media groups (2020).

Joly (Andalucía)	Diario de Sevilla, Diario de Cádiz, Diario de Jerez, El Día de Córdoba, Europa Sur, Huelva Información, Granada Hoy, Málaga Hoy, Diario de Almería
Promecal (The two Castiles)	Diario de Burgos, Diario de Ávila, Diario Palentino, El Día de [Valladolid, Segovia, Soria], La Tribuna de [Albacete, Ciudad Real, Cuenca, Guadalajara, Toledo], La 7 de Castilla y León TV, La 8 de Castilla y León TV, Navarra TV, Navarra TV 2
Voz (Galicia)	La Voz de Galicia, Radio Voz
Serra (Baleares)	Última Hora, Menorca, Majorca Daily Bulletin, Mallorca Magazin, Vesti Mallorca, Sóller, El Económico
Hermes (Catalonia)	El Punt Avui, L'Esportiu, Presència, L'Econòmic, Catalonia Today
La Información (Navarra)	Diario de Navarra
Noticias (Navarra and the Basque Country)	Diario de Noticias, Deia, Noticias de Álava, Noticias de Gipuzkoa
Edigrup (Castile and León)	Diario de León, El Mundo-Diario de Castilla y León [Valladolid, El Correo de Burgos, Diario de Soria]
Inforcasa (Canarias)	Canarias 7
FORTA	13 autonomous public broadcasting corporations (independent of one another)

Source: Authors' elaboration based on company websites.

On the other hand, in 13 of the 17 Spanish autonomous communities, public radio-television stations play an important role in regional media groups. These corporations were created in two waves in a way that resembles RTVE. The classic management model groups began in the 1980s, when TV3 aired in Catalonia, ETB in the Basque Country, TVG in Galicia, Channel 9 in Valencia, Canal Sur in Andalusia and Telemadrid. With a more outsourced management model and closer to the present century, IB3 in the Balearic Islands, Aragón Televisión, Castilla-La Mancha TV, TPA in Asturias, Canal Extremadura, 7 Región de Murcia and TV Canaria began launching. After the last People's Party administration shut down Channel 9 in Valencia, the Socialist administration reopened it under the Punt brand. All these public corporations are totally independent from one another, but they all belong to the Federation of Autonomous Radio and Television Organizations (FORTA for its initials in Spanish). Their political position tends to be somewhat closer to the historically dominant party in each region, namely PSOE in Andalusia, Aragon, Asturias, Castilla-La Mancha and Extremadura; PP in the Balearic Islands, Valencia, Galicia, Madrid and Murcia; and nationalists in the Canary Islands, Catalonia and the Basque Country.

4. Discussion

These results respond to the research question and formulated hypotheses. Indeed, 50 relevant media groups were identified and classified into national, sectorial and regional groups, following Artero's efforts from ten years ago (2010). Differences have been identified, however, in light of concentration processes (such as Prensa Ibérica's absorption of the Zeta group) and new companies have also appeared on the market (especially digital natives).

Comparison with previous research reveals the evolution of the market and the effects of the passage of time. With respect to Vázquez Montalbán's (1975) view, communication in Spain is now much more competitive, plural and diverse. In the newspaper world, public newspapers do not exist and censorship has been stamped out. Magazines are much more international and varied now as compared to the Franco regime. The radio has conserved large classic stations (like SER, Cope and Radio Nacional), but the public sector has gathered around RTVE and previously non-existent regional corporations. The private sector has expanded and taken over the vast majority of the market with new companies like Atresmedia. On television, the change from the RTVE monopoly to private competition is clear, with an intermediate step in terms of public regional television stations. Finally, not even a thought at the dawn of democracy, the digital media sector is entirely new. However, it has to be noted that the situation described at that book took place a long time ago and within a completely different political system.

Like Vázquez Montalbán, Bustamante (1982), Díaz Nosty (1989) and Nieto, Soria and Giner (1990) share a more qualitative and historical approach, eschewing quantitative measurement. The results herein confirm the public sector's progressive loss of weight in communication; it also reveals that the path towards liberalization has been traveled, trends that were already beginning to emerge. Media groups also began to form at the time; at first, they were mainly newspaper editors, such as Correo. From them, especially with the beginning of private television channels in 1990, the first three multimedia groups emerged, along with Prisa and Godó. The 1980s also witnessed the first autonomous radio and television entities, in a process of audiovisual decentralization parallel to that of Spanish autonomous regions.

Based on figures from 1990 and 2000, scholars offered the first quantitative data on media concentration (Sánchez-Tabernero, 1993: 131-135; Sánchez-Tabernero and Carvajal, 2002: 45-74). The leading groups for newspapers included Correo (15.3%) and Prisa (15%), with a total of more than four million copies sold per day. On the radio, SER captured 38% of total audience share at the beginning of the 1990s and 41% ten years later. On television, TVE captured 56% of audience share at first, which then dropped to 32%. In 2010, 60 media groups were identified, but only 13 reached more than 13% of the population (Artero, 2010: 185-187). These figures remain constant today. The same can be said of the groups' political leanings, as Reig indicated (2011: 209), which have remained fairly consistent.

This research does not provide quantitative data on media power indices (Noam and Mutter, 2016: 334-335) or the concentration that corresponds to each sector (Artero & Sánchez-Tabernero, 2015: 330-332). But the results do allow us to discuss the extent to which trends have stabilized. As was the case with the comparison between 2004 and 2012, the social importance of groups like Prisa, RTVE, Vocento and regional radio television have continued to decrease, while that of Planeta, RCS and Godó have presumably increased. The percentage of public ownership, which had already decreased, is now even lower, while foreign ownership has continued to rise. However, data confirming that, between 1984 and 2012, media concentration increased in Spain by double and even triple in industries such as newspapers, magazines and digital media, has not remained constant. The current market structure continues to be substantially similar to that of four years ago (Artero, Pérez Serrano and Segura, 2018: 34-40): newspapers, magazines and digital media are owned by extended oligopolies containing about ten competitors, while radio and television are organized by a stricter, smaller national oligopoly.

This study's data is helpful for elaborating a historical-descriptive overview like the one offered here in line with previous investigations from the 1970s and 80s (Vázquez Montalban, 1975; Bustamante, 1982; Díaz Nosty, 1989; Nieto, Soria & Giner, 1990). However, comparison with quantitative research on concentration is less relevant (Sánchez-Tabernero, 1993; Sánchez-Tabernero and Carvajal, 2002; Artero & Sánchez-Tabernero, 2015; Noam & Mutter, 2016). Herein lies this study's main limitation, which nonetheless offers keys for understanding media development beyond indicators related to competence levels.

5. Conclusions

This article has identified ten media groups that can be considered of national importance in Spain, including Planeta, Prisa, Vocento, Unidad Editorial, Mediaset, RTVE, Cope, Prensa Ibérica, Godó and Henneo. The aggregate gross audience of these groups reaches at least ten percent of the population. Likewise, these companies have years of experience in the market and are mostly the product of mergers and acquisitions, as is the case of Planeta with Atresmedia, Vocento with Prensa Española, Unidad Editorial with Recoletos, Mediaset with Cuatro, Cope with Trece TV, Prensa Ibérica with Zeta and Henneo with 20 Minutos. Only two cases reveal significant steps backwards in terms of corporate growth, including Prisa with the sale of Cuatro and Digital Plus and Godó with previous divestment from Antena 3 radio and television. In general, the media groups identified have a clear, sustained editorial line over time and multimedia presence in various sectors.

This study identified 18 sectorial groups, which can be further broken down into three categories, with significant positions in their various industries. First, the seven leading digital native media products, including El Español, El Confidencial, OK Diario, El Diario, Economía Digital, and the news divisions of Verizon and Microsoft. Second, the seven largest magazine publishing groups, including Hearst, RBA, Bertelsmann, Springer, Conde Nast, Hola, and Hermes. Finally, the four small or medium-sized groups with primarily radio and television presence, including Kiss, Secuoya, Libertad Digital and Intereconomía. All these companies primarily focus on their sectors and serve highly segmented audiences. Their editorial line ranges from trending media to a focus on apolitical entertainment, such as magazine editors.

Finally, 22 regional media groups, which limit their operations to one or two autonomous communities, persist. They are in turn divided into two groups. First, nine medium-sized family businesses mainly dedicated to publishing newspapers: Joly (Andalusia), Promecal (the two Castiles), Voz (Galicia), Serra (Balearic Islands), Hermes (Catalonia), La Información (Navarra), Noticias (Navarra and the Basque Country), Edigrup (Castilla y León) and Inforcasa

(Canary Islands). Other small, local publishers with a limited regional presence could be added. They are usually companies with a strong ideology and represent a significant part of local society, but rarely the whole. The group consists of the 13 autonomous public radio and television corporations, which are organized in FORTA and exist in all of Spain's autonomous communities except Cantabria, Castilla y León, Navarra and La Rioja. Their editorial leanings are usually in line with the respective, historically dominant political party.

These results suggest, on the one hand, that changes to media structure occur slowly over decades. New groups (such as digital natives) or groups that have folded (such as 16, Prensa Española, Recoletos or Zeta) represent more of an exception than the rule. In this way, studying the market according to its structural features at each precise moment becomes feasible. For this, the most pertinent unit of analysis corresponds to media groups rather than to individual means of communication. On the other hand, those who design public policy should closely monitor the media industry (especially journalism) to avoid dominant positions at the national, regional and local levels. Scholars should also continue to provide analysis and recommendations for achieving said end, as seen in the research published over the decades, which is both quantitative and, like this article, more historical-descriptive in nature.

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