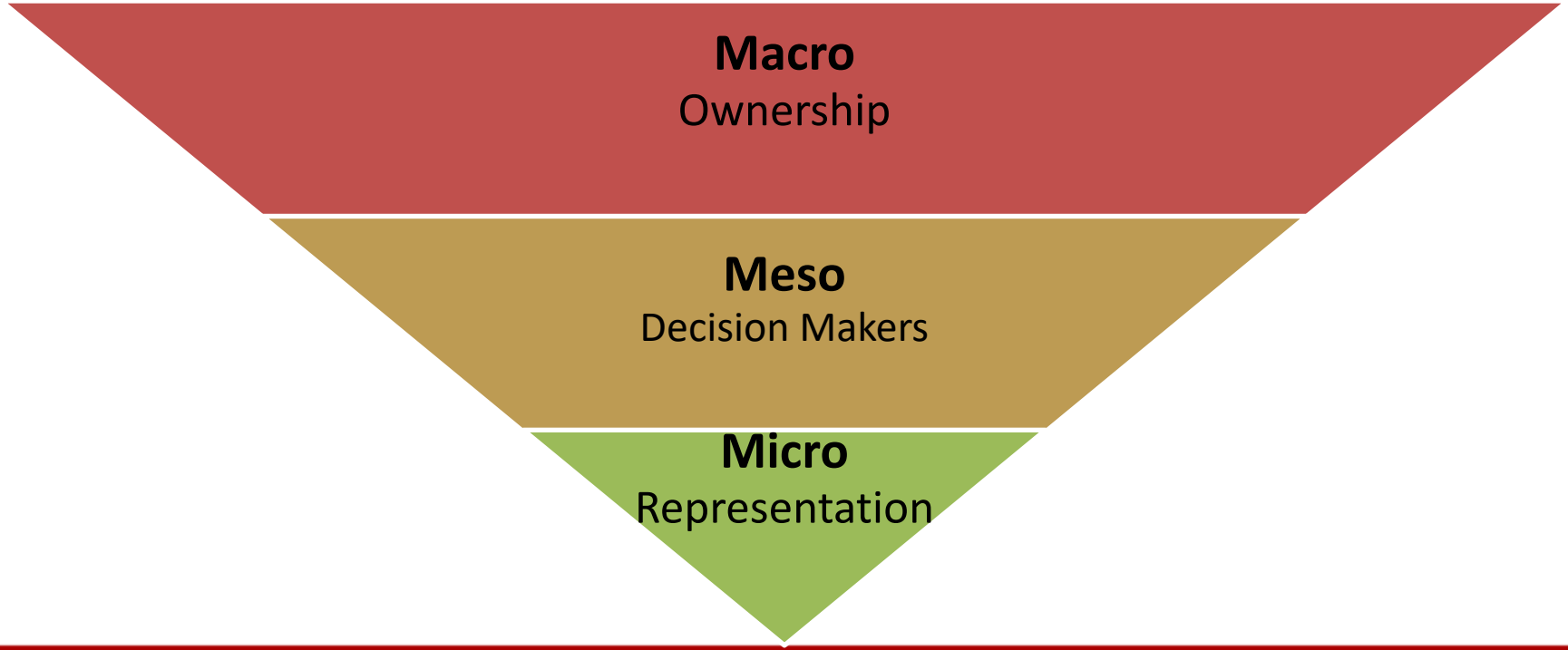
SEATTLEU

“Does the Dearth of Media Diversity Contribute to Disinformation, Defamation and Disserve Democracy?”

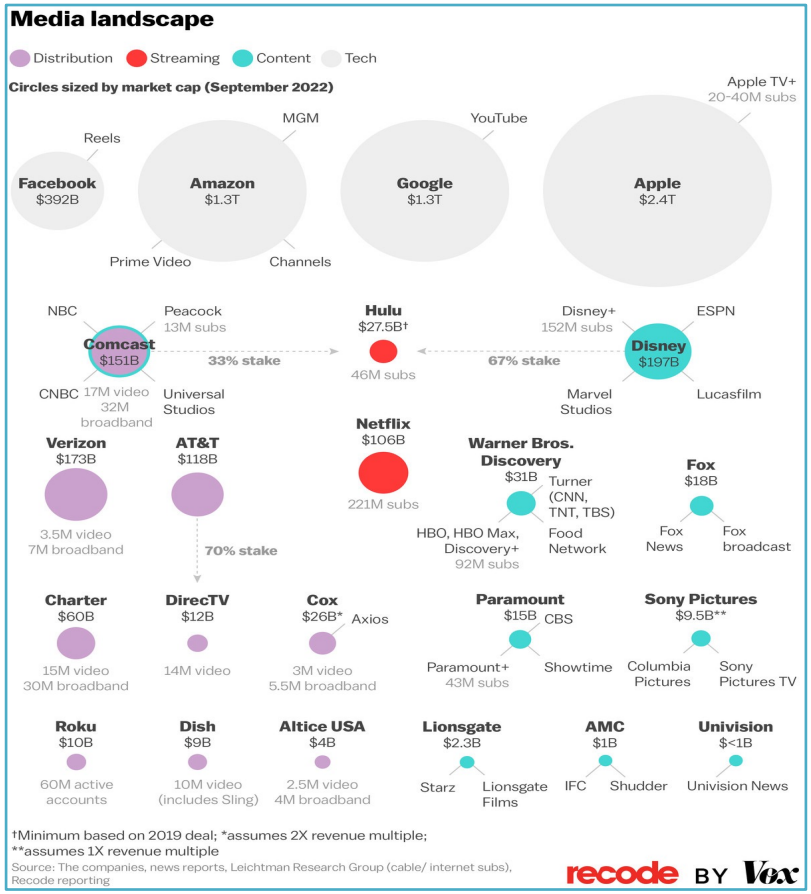
Caitlin Ring Carlson

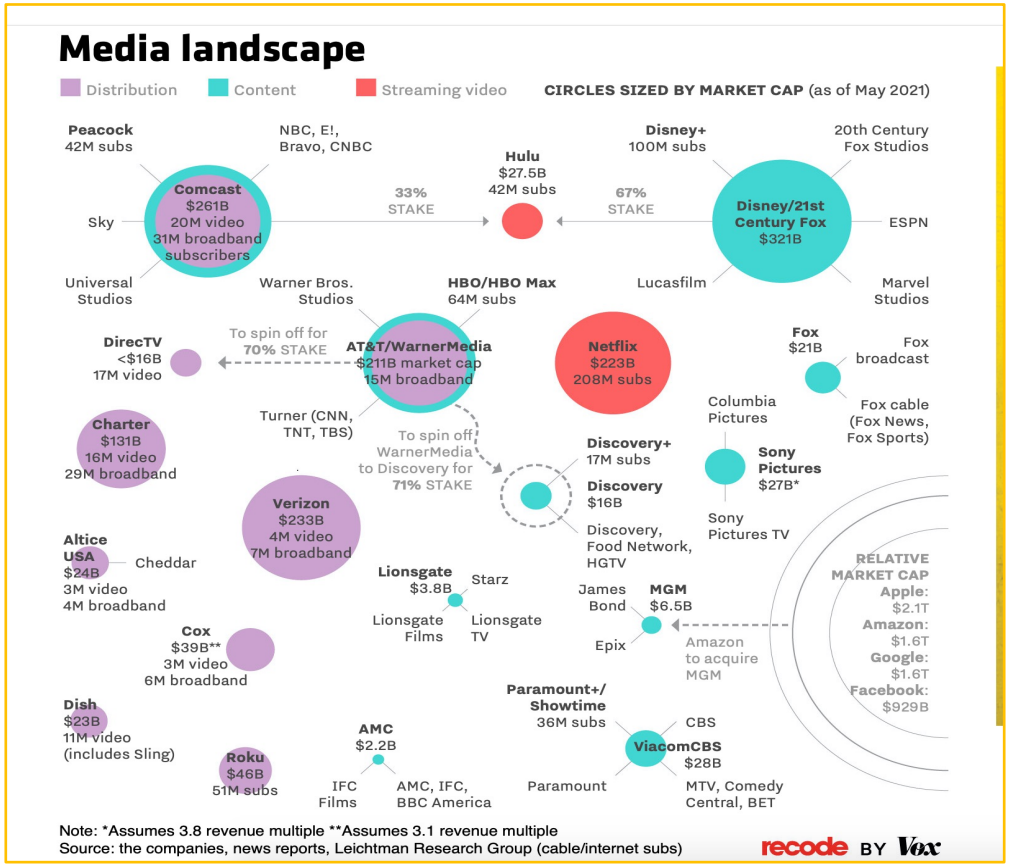
Diversity in U.S. Media



U.S. Media Ownership

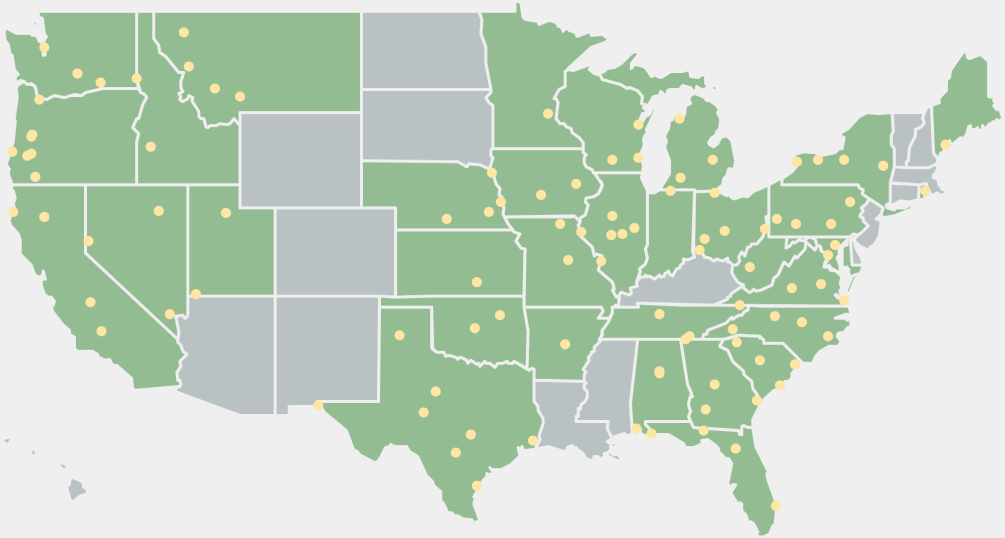
- Consolidated
- Hypercommercial
- Homogenous
  - Extreme lack of racial & gender diversity


Media landscape
Distribution
Streaming
Content
Tech
Circles sized by market cap (September 2022)
Facebook
$392B
Reels
Amazon
$1.3T
MGM
Prime Video
Channels
Google
$1.3T
YouTube
Apple
$2.4T
Apple TV+
20-40M subs
NBC
Peacock
13M subs
Comcast
$151B
CNBC
17M video
32M
broadband
Universal
Studios
33% stake
Hulu
$27.5B†
46M subs
67% stake
Disney+
152M subs
ESPN
Disney
$197B
Marvel
Studios
Lucasfilm
Verizon
$173B
3.5M video
7M broadband
AT&T
$118B
70% stake
Netflix
$106B
221M subs
Warner Bros.
Discovery
$31B
Turner
(CNN,
TNT, TBS)
HBO, HBO Max,
Discovery+
92M subs
Food
Network
Fox
$18B
Fox
News
Fox
broadcast
Charter
$60B
15M video
30M broadband
DirecTV
$12B
14M video
Cox
$26B*
Axios
3M video
5.5M broadband
Paramount
$15B
CBS
Paramount+
43M subs
Showtime
Sony Pictures
$9.5B**
Columbia
Pictures
Sony
Pictures TV
Roku
$10B
60M active
accounts
Dish
$9B
10M video
(includes Sling)
Altice USA
$4B
2.5M video
4M broadband
Lionsgate
$2.3B
Starz
Lionsgate
Films
AMC
$1B
IFC
Shudder
Univision
$<1B
Univision News
†Minimum based on 2019 deal; *assumes 2X revenue multiple;
**assumes 1X revenue multiple
Source: The companies, news reports, Leichtman Research Group (cable/ internet subs),
Recode reporting
recode BY Vox


Media landscape
Distribution
Content
Streaming video
CIRCLES SIZED BY MARKET CAP (as of May 2021)
Peacock
42M subs
NBC, E!, Bravo, CNBC
Comcast
$261B
20M video
31M broadband subscribers
Sky
Universal Studios
33% STAKE
Hulu
$27.5B
42M subs
67% STAKE
Disney+
100M subs
20th Century Fox Studios
Disney/21st Century Fox
$321B
ESPN
Lucasfilm
Marvel Studios
Warner Bros. Studios
HBO/HBO Max
64M subs
DirecTV
<$16B
17M video
To spin off for 70% STAKE
AT&T/WarnerMedia
$211B market cap
15M broadband
Turner (CNN, TNT, TBS)
Netflix
$223B
208M subs
Fox
$21B
Fox broadcast
Fox cable (Fox News, Fox Sports)
Columbia Pictures
Sony Pictures
$27B*
Sony Pictures TV
Charter
$131B
16M video
29M broadband
To spin off WarnerMedia to Discovery for 71% STAKE
Discovery+
17M subs
Discovery
$16B
Discovery, Food Network, HGTV
Verizon
$233B
4M video
7M broadband
Altice USA
$24B
3M video
4M broadband
Cheddar
Lionsgate
$3.8B
Starz
Lionsgate Films
Lionsgate TV
James Bond
MGM
$6.5B
Epix
Amazon to acquire MGM
RELATIVE MARKET CAP
Apple: $2.1T
Amazon: $1.6T
Google: $1.6T
Facebook: $929B
Cox
$39B**
3M video
6M broadband
Dish
$23B
11M video
(includes Sling)
Roku
$46B
51M subs
AMC
$2.2B
IFC Films
AMC, IFC, BBC America
Paramount+/ Showtime
36M subs
CBS
ViacomCBS
$28B
Paramount
MTV, Comedy Central, BET
Note: *Assumes 3.8 revenue multiple **Assumes 3.1 revenue multiple
Source: the companies, news reports, Leichtman Research Group (cable/internet subs)
recode BY Vox

SINCLAIR

menu



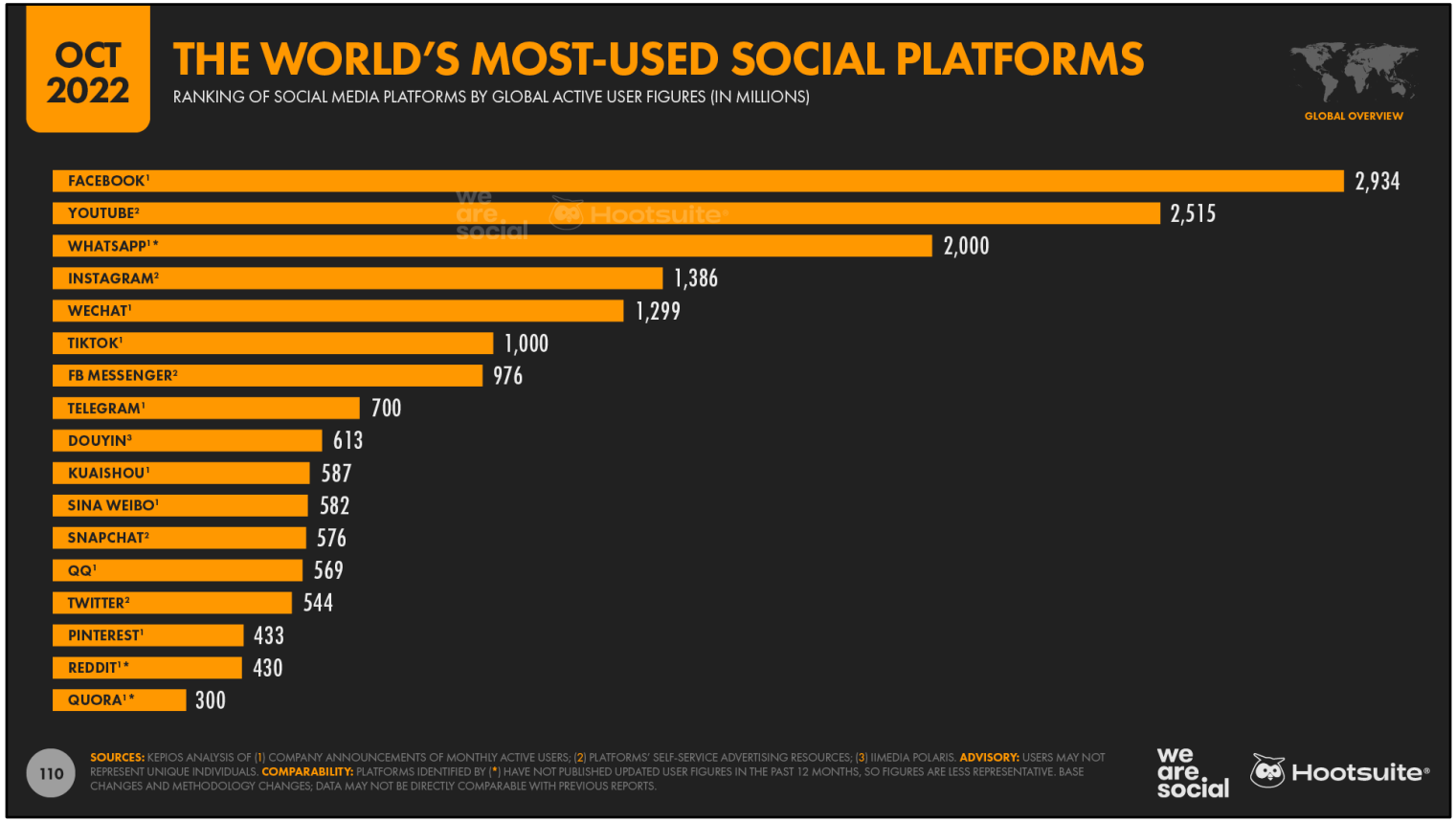
People with Content Everywhere

Local Focus, National Reach

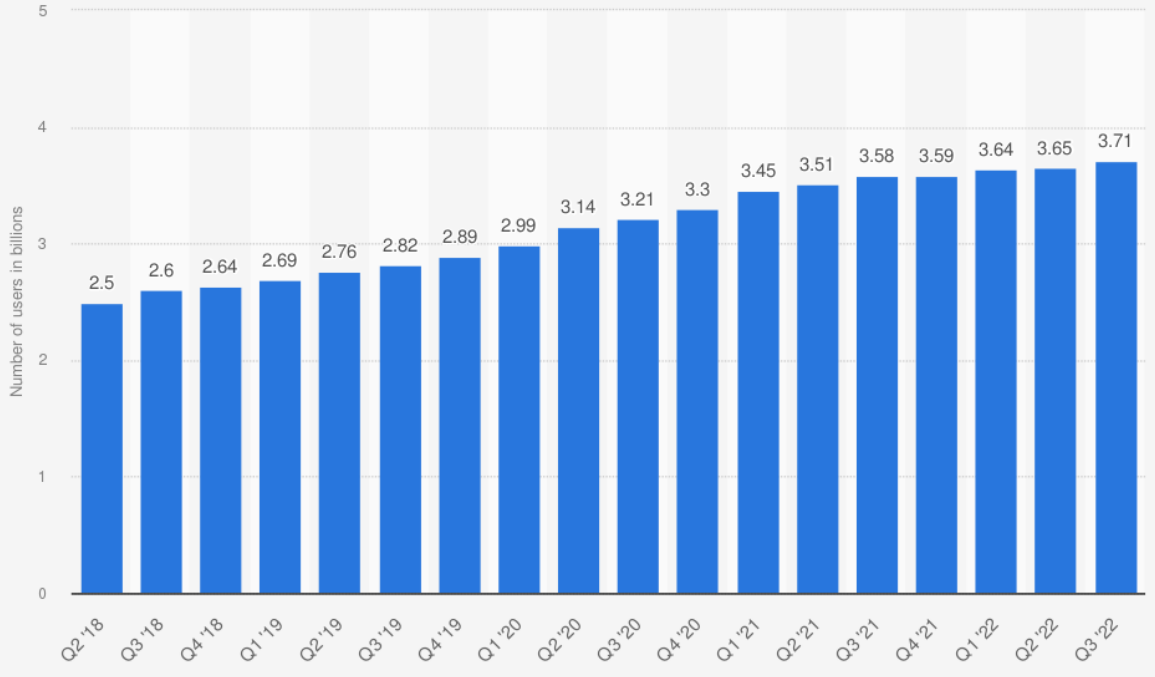
185 Owned or Operated Stations in 86 Markets

Sinclair is one of the largest and most diversified television broadcasters with a local focus and a national reach.

FOX 29
KATU 2
NEW
GETTING THE FACTS
FOX 11
LOCAL 12
NEWS


OCT 2022
THE WORLD'S MOST-USED SOCIAL PLATFORMS
RANKING OF SOCIAL MEDIA PLATFORMS BY GLOBAL ACTIVE USER FIGURES (IN MILLIONS)
GLOBAL OVERVIEW
FACEBOOK[1] 2,934
YOUTUBE[2] 2,515
WHATSAPP[1]* 2,000
INSTAGRAM[2] 1,386
WECHAT[1] 1,299
TIKTOK[1] 1,000
FB MESSENGER[2] 976
TELEGRAM[1] 700
DOUYIN[3] 613
KUAISHOU[1] 587
SINA WEIBO[1] 582
SNAPCHAT[2] 576
QQ[1] 569
TWITTER[2] 544
PINTEREST[1] 433
REDDIT[1]* 430
QUORA[1]* 300
110
SOURCES: KEPIOS ANALYSIS OF (1) COMPANY ANNOUNCEMENTS OF MONTHLY ACTIVE USERS; (2) PLATFORMS' SELF-SERVICE ADVERTISING RESOURCES; (3) IIMEDIA POLARIS. ADVISORY: USERS MAY NOT REPRESENT UNIQUE INDIVIDUALS. COMPARABILITY: PLATFORMS IDENTIFIED BY (*) HAVE NOT PUBLISHED UPDATED USER FIGURES IN THE PAST 12 MONTHS, SO FIGURES ARE LESS REPRESENTATIVE. BASE CHANGES AND METHODOLOGY CHANGES; DATA MAY NOT BE DIRECTLY COMPARABLE WITH PREVIOUS REPORTS.
we are social
Hootsuite

Cumulative number of monthly Meta product users as of 3rd quarter 2022 (in billions)



Sources
Facebook; Meta Platforms
© Statista 2022

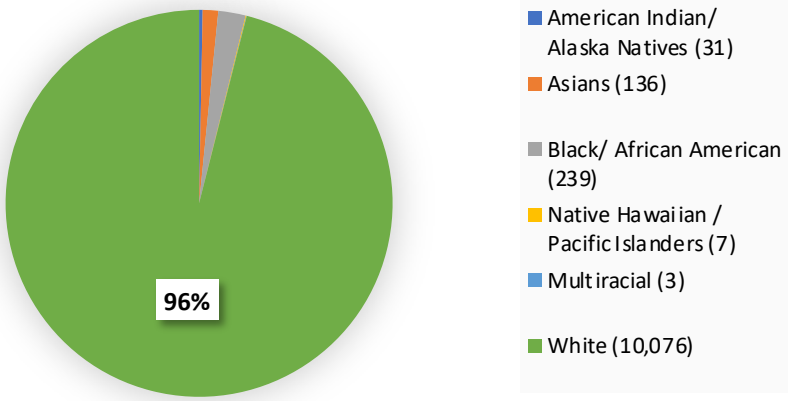
Additional Information:
Worldwide; Meta Platforms; Q2 2018 to Q3 2022; Facebook, WhatsApp, Instagram, and Messenger

Hypercommercial

- Amazon (NASDAQ: AMZN)
- Apple (NASDAQ: AAPL)
- AT&T (NYSE: T)
- Comcast (NASDAQ: CMCSA)
- Fox (NASDAQ: FOX)
- Google (NASDAQ: GOOGL)
- Meta (NASDAQ: META)
- Netflix (NASDAQ: NFLX)
- NewsCorp (NASDAQ: NWSA)
- Paramount Global (NASDAQ: PARA)
- Sinclair Television Group (NASDAQ: SBGI)
- Sony (NYSE: SONY)
- Walt Disney (NYSE: DIS)
- Warner Bros. (NASDAQ: WBD)

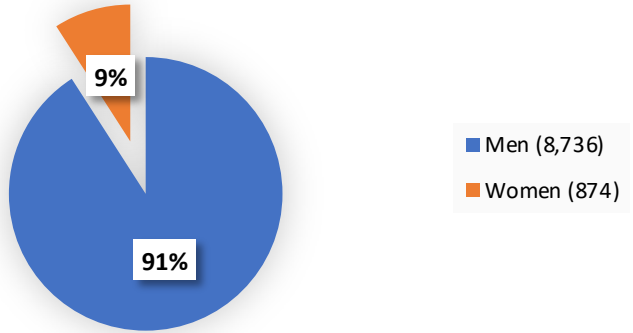
Homogenous

Commercial Television and Radio Station Ownership by Race



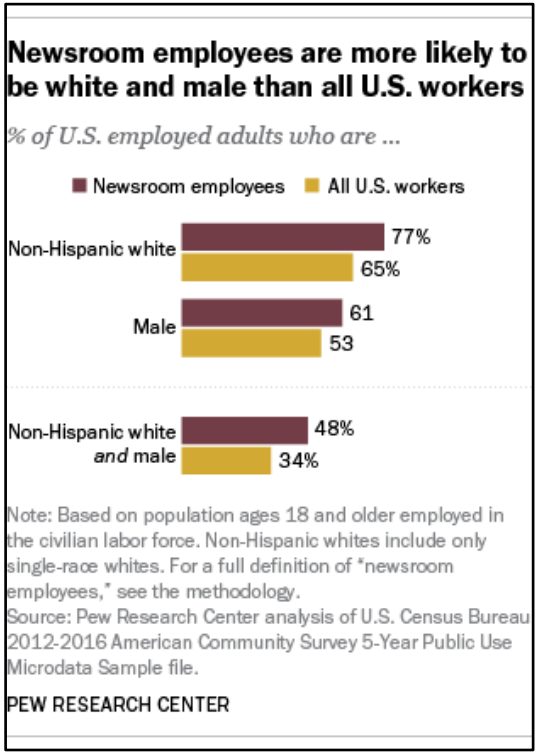
People of Color Own:
1.9% of TV Stations & 2.9 % of FM Radio

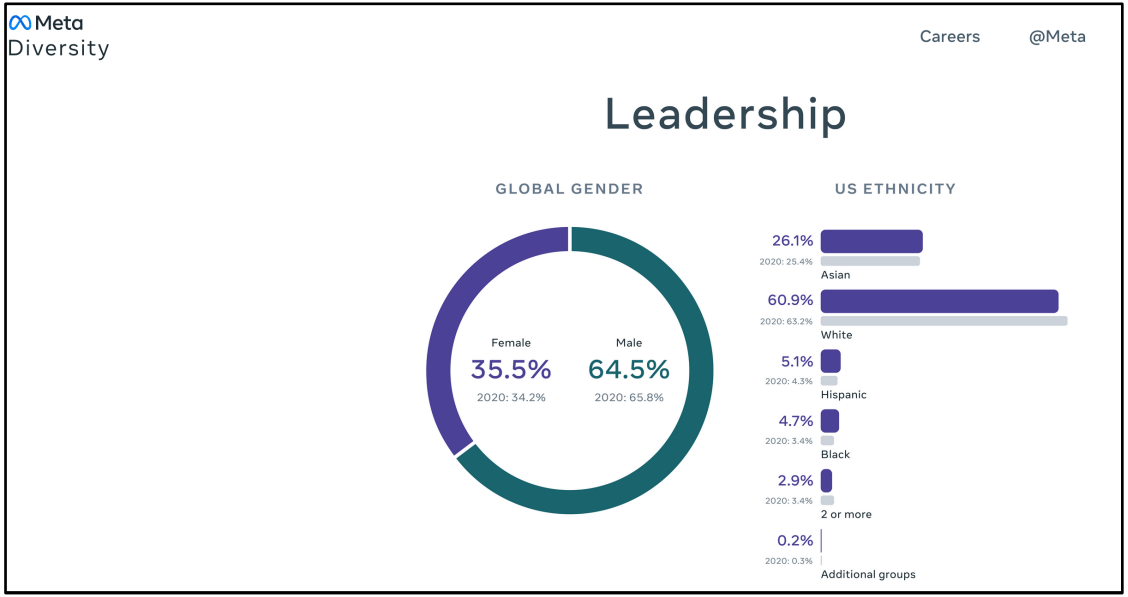
Commercial Broadcast Television and Radio Station Ownership by Gender



Women Own:
5.3% of TV Stations & 7.2% of FM Radio

Homogenous


Newsroom employees are more likely to be white and male than all U.S. workers
% of U.S. employed adults who are ...
Newsroom employees
All U.S. workers
Non-Hispanic white
77%
65%
Male
61
53
Non-Hispanic white and male
48%
34%
Note: Based on population ages 18 and older employed in the civilian labor force. Non-Hispanic whites include only single-race whites. For a full definition of "newsroom employees," see the methodology.
Source: Pew Research Center analysis of U.S. Census Bureau 2012-2016 American Community Survey 5-Year Public Use Microdata Sample file.
PEW RESEARCH CENTER


Meta
Diversity
Careers
@Meta
Leadership
GLOBAL GENDER
Female
35.5%
2020: 34.2%
Male
64.5%
2020: 65.8%
US ETHNICITY
26.1%
2020: 25.4%
Asian
60.9%
2020: 63.2%
White
5.1%
2020: 4.3%
Hispanic
4.7%
2020: 3.4%
Black
2.9%
2020: 3.4%
2 or more
0.2%
2020: 0.3%
Additional groups

How U.S. Media Structure Creates Climate for Disinformation

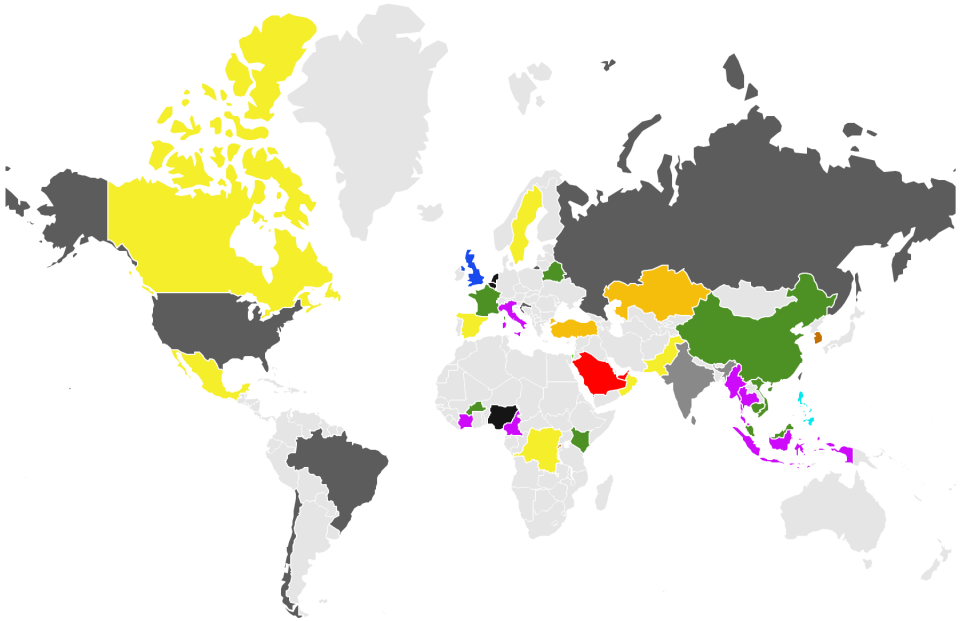
- Media monopolies undermine our news and information systems. The decrease in informative, fact-based journalism has created a void for disinformation to fill

- Disinformation is profitable. Hypercommercial, algorithmically driven media system prioritizes extreme, polarized content

- Lack of effective regulatory oversight enables the spread of disinformation and undermines democracy

Digital Services Act &
Digital Markets Act
New landmark rules for online platforms in the EU.
#DigitalServicesAct #DigitalMarketsAct #DigitalEU

Here's where governments are taking action against online misinformation



Law · Media literacy · Bill · Internet shutdowns · Law enforcement · Failed legislation · Proposal · Task force · Report · Investigation · Threats · Court ruling

Systemic Solutions Required

- Invest in media literacy (but it alone insufficient)
- Break up monopolies/ oligopolies
- Require public interest protections / obligations
- Use libel lawsuits to punish bad actors
- Establish a public media option. We need nonprofit media institutions supported by public subsidies

Thank you!!

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SEATTLEU

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