

Value of Media Report

2026



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Value of Media 2026

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Established formally in 2003, the Responsible Media Forum (RMF) is a partnership between 21 media companies to identify and act on the social and environmental challenges facing the sector. Having started as a UK initiative, participants now come from all over the world covering the sector in all its diversity. One key principle of our work is the idea that media has a unique responsibility issue through the content it produces, which sets it apart from most other sectors. The Responsible Media Forum is a multi-client project run by SLR Consulting Ltd.

responsiblemediaforum.org / [@WeAreRMF](https://twitter.com/WeAreRMF)



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Executive Summary

This report evaluates what value media creates, amplifies, or limits for society. It categorises value into Societal, Economic, and Democratic pillars. It identifies specific themes within those pillars (see table below).

The report distinguishes between 'human-based' and 'technology-based' media companies based on the degree of control, responsibility and accountability for content, the nature of the consumers of that content, and the role of humans.

Under the **Societal** pillar, the report finds that media creates value by strengthening social cohesion, preserving culture, supporting education and life-long learning, and delivering entertainment with social relevance. Based on these values, we found that human and technology-based media can bring people together, support culture, talent and education, and provide entertaining content and experiences. Human-based media is particularly important where value depends on representation, shared understanding and exposure to different perspectives, while technology-based media supports society through the power of technology and amplifies the values created by human-based media of awareness, creativity and connection.

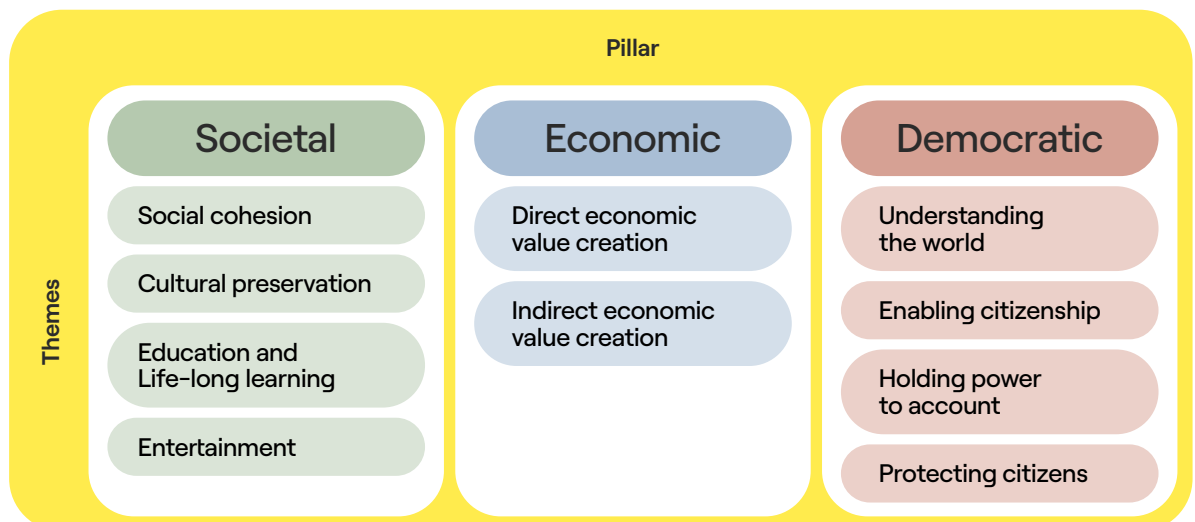
Both media types generate direct and indirect economic value under the **Economic** pillar. The types of direct economic value for both types of media include revenue for media itself and brands through advertising, employment and business opportunities. Indirect economic value differs between both of our definitions. Technology-based media uniquely supports the creator economy (i.e. user-generated content) and invests in technological research and development.

Under the **Democratic** pillar, media helps citizens understand the world, participate in democratic life, hold power to account and stay protected from harm.

Human-based media creates the strongest value where information is independent, high-quality, fact-based and verifiable. Technology-based media can amplify reliable information created by human-based media and widen participation, but its contribution is more mixed where algorithmic design reinforces filter bubbles, misinformation or harmful content.

Generative AI is accelerating the digital transformation of the media landscape, and transforming how we create, distribute, and consume information. Set in the context of a challenging economic environment for human-based media companies and intensifying competition over advertising revenues between human-based and technology-based media companies, we argue for measures to safeguard the value that media creates for society such as maintaining media and press freedom; nurturing and protecting a diverse media landscape; encouraging advertising markets to invest in high-quality content; tightening and expanding copyright laws; changes to algorithms to reduce filter bubbles and the promotion of extreme content; and stimulating the creative and technology industries.

This report is based on desk-based research, discussions with a working group of media representatives and interviews with experts. We received limited direct engagement from technology-based media companies. It should be read with those limitations in mind.



Introduction



About the RMF

Formally founded in 2003, the Responsible Media Forum (RMF) brings together 21 media organisations to tackle sustainability issues confronting the industry. Originally launched as a United Kingdom (UK)-based initiative, the Forum has since grown into a global partnership, representing a wide breadth of the media sector. Central to RMF's approach is the belief that media organisations carry a distinct responsibility because of the influence of the content they create – a responsibility that sets the sector apart from most others.

Why this report

Media has consistently played a vital role in shaping public awareness and education, influencing opinion, and catalysing collective action. Through trusted, wide-reaching channels such as print, television, and radio, it has a history of amplifying complex global issues and making them accessible to mass audiences. For instance, documentaries, investigative journalism, and news coverage played a significant role in spotlighting the environmental impact of plastic waste.¹ This not only elevated public concern but also pressured governments, corporations, and consumers to take meaningful action.² As stated by President Emmanuel Macron during the adoption of the Paris Declaration on Multilateral Action, media is facing “multiple crises”, referring to threats to economic sustainability, public trust and information integrity. The declaration shows that governments increasingly recognise access to independent and reliable information as an area requiring urgent policy intervention and as essential for human progress and welfare.³

- 1 Research shows that the BBC's documentary series, *The Blue Planet*, set the agenda for plastic pollution in the UK and generated long-lasting interest that led to political action. Jennifer Males and Peter Van Aelst, *Did the Blue Planet set the Agenda for Plastic Pollution? An Explorative Study on the Influence of a Documentary on the Public, Media and Political Agendas*, Environmental Communication, 2020, pp.1–15, <https://doi.org/10.1080/17524032.2020.1780458>
- 2 A survey found that those who had watched the *Blue Planet* series said they were more likely to participate in clean-ups and would try to purchase less single-use plastics. Lynda D. Rodwell, et al., *A Sustainability Impact Assessment of the Plastic Pollution Coalition's 'Blue Planet II' Campaign*, Marine Pollution Bulletin, 2020, <https://doi.org/10.1016/j.marpolbul.2020.111592>
- 3 Forum on Information and Democracy, *Twenty-nine Governments Join Forces in Defense of Access to Free and Reliable Information Worldwide: Historic Paris Declaration on Multilateral Action Lays Out Commitments by Leading Democracies*, 30 October 2025, <https://informationdemocracy.org/2025/10/30/twenty-nine-governments-join-forces-in-defense-of-access-to-free-and-reliable-information-worldwide/>

More broadly, media has been instrumental in advancing other major societal shifts. During the campaign for women's suffrage, newspapers and dedicated suffrage publications were used to inform, mobilise, and build public support for voting rights, helping to sustain a movement that ultimately secured democratic reform.⁴ Similarly, extensive coverage across newspapers, radio, and television helped galvanise international opposition to apartheid by exposing the realities of racial oppression and building public and political pressure for change.⁵ These examples illustrate how media, through the content it produces, can create significant value for society by informing public discourse and supporting positive societal change.

However, media's contribution to societal progress has not been without its challenges. Despite advances in gender equality, women remain significantly underrepresented in global news media – as sources, subjects and editorial leaders – limiting the diversity of perspectives reflected in public discourse.⁶ In some cases, media coverage has also limited public understanding of complex social challenges. For example, climate denial was given a disproportionate share of climate change coverage for too long after the scientific debate on the fact that humans are causing our climate to change was settled, leading to doubts despite the strong scientific consensus.⁷ Similarly, during public health crises such as COVID-19, coverage of misleading views contributed to public confusion and mistrust. Moreover, algorithmic platforms can prioritise content that maximises engagement, which in some cases amplifies extreme or polarising content over accurate information.⁸ Hence, opportunities to strengthen media's impact and address existing limitations remain.

A transition is now underway in where and how people are getting their information.⁹ Across the world, studies show declining engagement and stagnating digital subscriptions in "traditional" media, replaced by consumption of information and entertainment through social media and video platforms.¹⁰ This digital transition has been taking place since the early 2000s, but is changing and accelerating in the 2020s, with the rise of Generative Artificial Intelligence (GenAI).

While this transition has had positive impacts, for example by making information more accessible and cheaper to the general public, it also poses risks: to media companies, the high-quality information and entertainment that they provide, and by extension to the societies that benefit from it.

Large technology companies, including technology platforms and social media companies, are challenging the conventional forms of content creation and information sharing. As a result, these organisations that are operating with different business models are starting to dominate the market, particularly in terms of advertising income, which continued to overtake "traditional" media in 2025.¹¹

This has led to a situation where media companies that serve the public interest are in crisis – in part because the value they provide to society is insufficiently recognised.¹² This report aims to contribute to a better understanding and recognition of the value that media provides to society. It starts by proposing how we can distinguish between the different types of media described in the following section (see [page 14](#)). It will then explore how all types of media create value for society, and what drives that value creation. It will then conclude with how this value can be protected and grown.



4 Carol Quirke, *Front Pages, Front Lines: Media and the Fight for Women's Suffrage*, *Journal of American History*, Volume 108, Issue 3, December 2021, Page 613, <https://doi.org/10.1093/jahist/jaab285>

5 Maria Armoudian, *Media and the End of Apartheid in South Africa*, *Truthout*, December 2013, <https://truthout.org/articles/media-and-the-end-of-apartheid-in-south-africa/>

6 Intunwatch, *Why Women's Voices Still Remain Silenced in Global News Media*, September 2025, <https://intunwatch.com/why-womens-voices-still-remain-silenced-in-global-news-media/>

7 Max Witynski, *False Balance Reporting on Climate Change Crisis*, *Northwestern Now*, 2022, <https://news.northwestern.edu/stories/2022/07/false-balance-reporting-climate-change-crisis>

8 Reuters, *Reuters Institute Digital News Report 2026*, Reuters Institute for the Study of Journalism, 2026, <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2026>

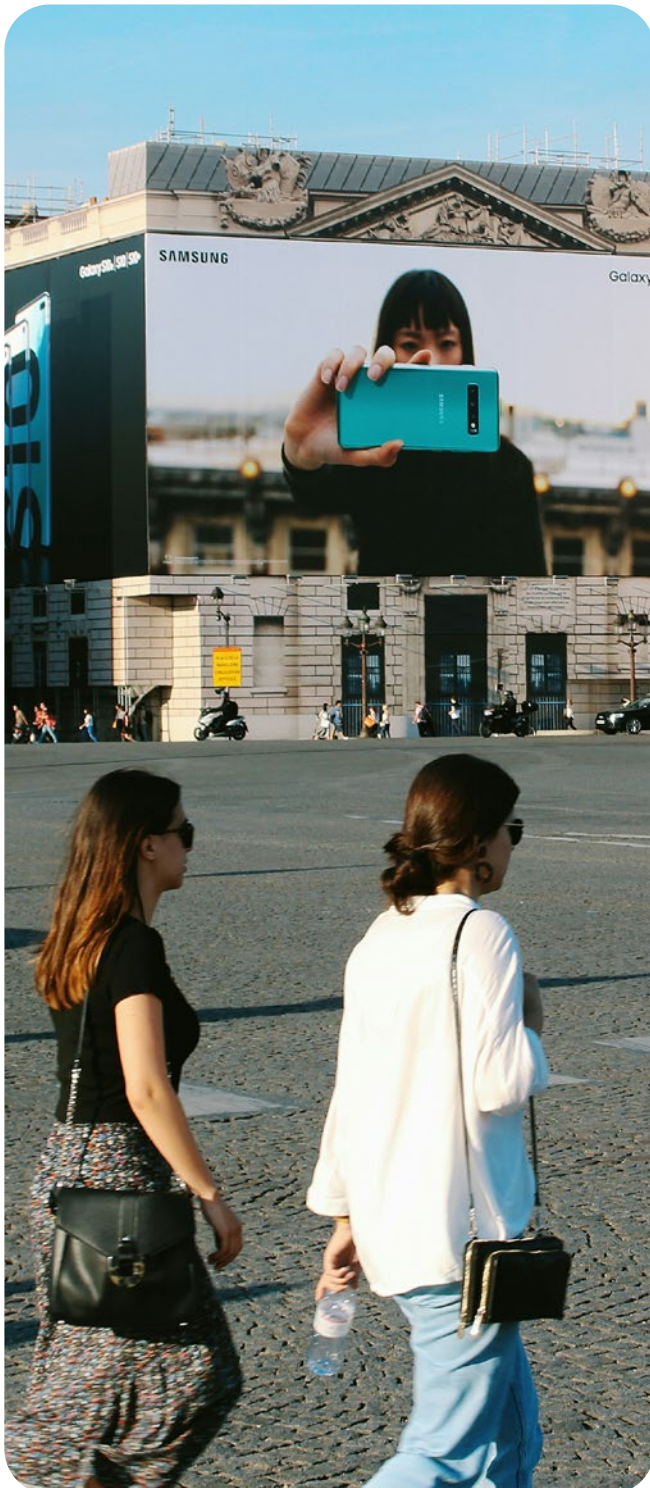
9 Dame Frances Cairncross, *The Cairncross Review: A Sustainable Future for Journalism*, Department for Culture, Media and Sport, 12 February 2019, <https://www.gov.uk/government/publications/the-cairncross-review-a-sustainable-future-for-journalism>

10 Nic Newman, *Digital News Report 2025: Executive Summary*, Reuters Institute for the Study of Journalism, June 2025, <https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2025/dnr-executive-summary>

11 WPP Media, *This Year Next Year 2025 Global Midyear Forecast*, June 2025, <https://www.wppmedia.com/news/tyny-midyear-2025>

12 Forum on Information and Democracy, *The Economic Imperative of Investing in Public Interest Media*, September 2025, <https://informationdemocracy.org/wp-content/uploads/2025/10/The-Economic-Imperative-of-Investing-in-Public-Interest-Media.pdf>

Methodology and limitations



This report is based on desk-based research and interviews with representatives from media companies and wider stakeholders, including investors, policymakers, think tanks, Non-Governmental Organisations (NGOs) and trade associations. The desk-based research included a review of publicly available sources, company disclosures, industry reports and relevant academic and policy literature, and was used to develop the initial list of values and value drivers. This initial list was then reviewed and further developed through internal consultation with a working group of RMF participants¹³ and interviews with external stakeholders. See [Appendix A](#) for the list of external stakeholders interviewed.

The analysis of the desk-based research and interviews was qualitative and based on our media experience, gathered over multiple decades, and challenge offered by the RMF working group and external interviewees. The ultimate aim was to identify and describe the main ways in which media creates, amplifies or limits value for society, rather than to provide a quantified assessment of impact. As such, the findings reflect the evidence available through the sources reviewed and the perspectives gathered through stakeholder interviews and internal consultation with a RMF working group. Invitations to participate were extended to both representatives of human-based and technology-based media companies. Unfortunately, we were not successful in securing interviews with technology-based media companies or organisations representing such companies, even though we reached out to multiple organisations. Therefore, results for this cohort are only based on publicly available information and the interviews we conducted, and should be interpreted with this limitation in mind.

We incorporated stakeholder views only where there was evidence that the value drivers were intentional or designed into their activities. For example, formal initiatives, commitments, policies, targets, products, programmes or editorial approaches that seek to create or strengthen a specific form of societal, economic or democratic value.

¹³ See here for a full list of RMF participating companies: Responsible Media Forum, Participants, Accessed 8 September 2026, <https://responsiblemediaforum.org/who>

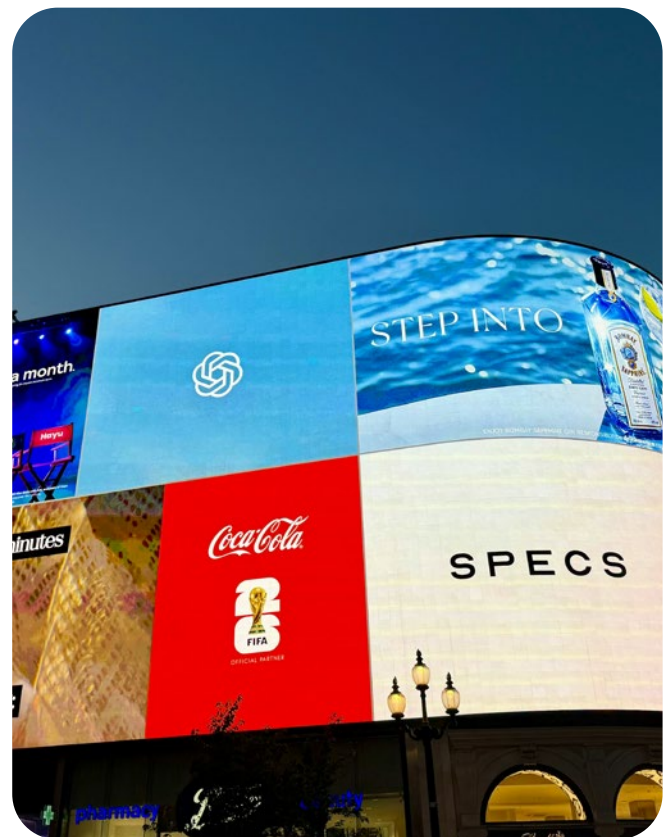
Media's cultural and economic importance

The media sector's role as a global economic driver and contributor to employment and talent is growing. The global entertainment and media industry grew 5.3% in 2025, with total revenue from advertising, connectivity and consumer spending reaching US\$3.5 trillion, and is predicted to grow to US\$4.2 trillion by 2030.¹⁴ Cultural and creative industries including media contribute to approximately 3.1% of GDP and 6.2% of global employment.¹⁵ Beyond the direct economic activity, media also generates indirect value. For example, for every \$1 invested in journalism, more than \$100 can be generated in public savings through improved public services, reclaimed funds and reduced corruption. A study of 152 countries found that increased access to free media can result in reduction of human rights abuses and lower the likelihood of conflict and repression. Further evidence points to the wider economic cost of declining press freedom, where a study of 97 countries found that weakened independent media is associated with a 1-2% reduction in real GDP growth. Separately, disinformation costs societies US\$350-516 billion each year, and that independent journalism is one of the most effective defences against it.¹⁶

\$3.5tr

total entertainment and media revenue from advertising, connectivity and consumer spending in 2025

This growth is largely fuelled by the boom of digital advertising, which is growing faster than advertising overall. In 2026, spend on digital advertising is forecast to grow by 6.7%, representing 69% of total advertising investment.¹⁷ The use of new technologies including AI is expected to support this growth even further, with greater targeting and personalisation enabling higher advertising revenues.



¹⁴ PwC, *Global Entertainment and Media Outlook 2026–2030*, 22 June 2026, <https://www.pwc.com/gx/en/news-room/press-releases/2026/pwc-2026-global-entertainment-media-outlook.html>

¹⁵ UNESCO, *ReShaping Policies for Creativity: Addressing Culture as a Global Public Good*, 2022, <https://unesdoc.unesco.org/ark:/48223/pf0000380474>

¹⁶ UNESCO, *New Report Reveals Global Evidence of Independent Journalism's Economic and Security Value*, 22 June 2026, <https://www.unesco.org/en/articles/new-report-reveals-global-evidence-independent-journalisms-economic-and-security-value>

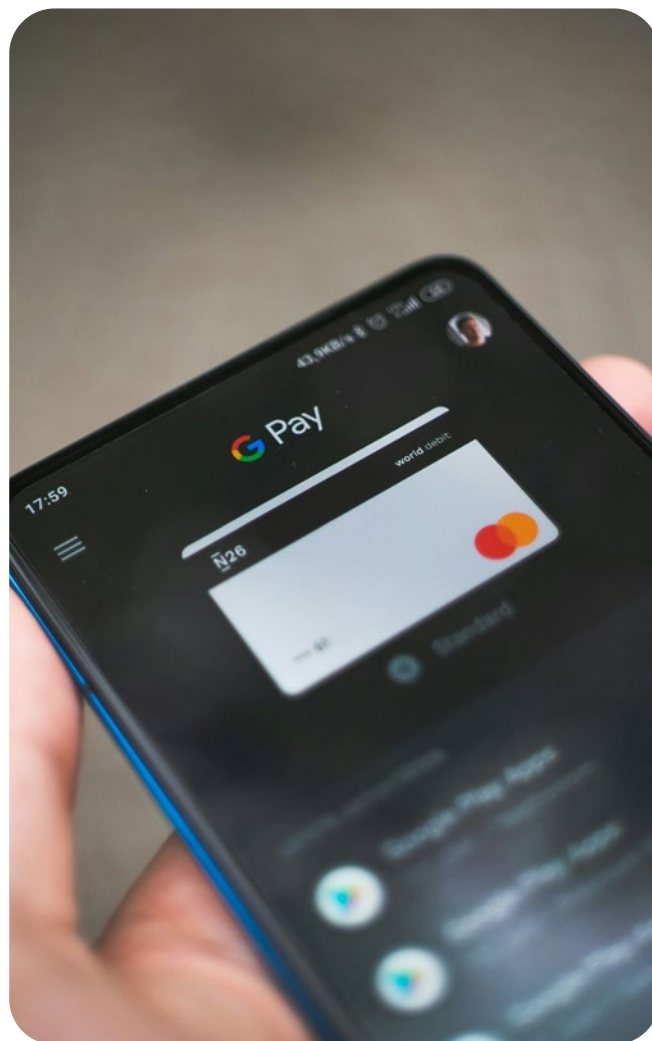
¹⁷ Dentsu, *Global Ad Spend Set to Surpass One Trillion for the First Time in 2026 as the Algorithmic Era Redefines Growth*, December 2025, <https://www.dentsu.com/news-releases/global-ad-spend-set-to-surpass-one-trillion-for-the-first-time-in-2026-as-the-algorithmic-era-redefines-growth>

Although the media industry and its advertising revenue is growing year on year, technology companies are taking a larger share of the market compared to traditional forms of media.¹⁸ We define these two types of media as “technology-based” and “human-based” media in the next section (see [page 14](#)). To better understand the relative economic scale of both media types, we compared the top 10 companies by total corporate revenue and number of employees. Based on the selected companies, our analysis shows that technology-based media generates approximately **five times the revenue of human-based media, while they employ approximately three times as many people.**¹⁹ As some of the human-based and technology-based companies analysed operate non-media businesses (e.g., consumer products, hospitality, software, and research and development), the comparison is an indication of their size and scale rather than a precise measure of media-sector revenues. Nevertheless, the comparison illustrates the larger scale of technology-based media companies and the financial resources available to companies such as Alphabet, Microsoft and Meta. This is most likely due to the non-media businesses that they operate, such as cloud computing, digital infrastructure and advertising technology. On the other hand, human-based media companies typically depend more on the commercial performance of their content, through advertising and subscription revenues. A direct link has been identified between increasing competition from technology-based companies and the reduction of media pluralism in the European Union (EU).²⁰

5x

more revenue is generated by technology-based media compared to human-based media

Next to its economic contribution, the media sector also makes cultural contributions to society. The RMF has a long history of evaluating this. In [2013](#), we argued that the media sector actively impacts society through the content it produces (also known as media’s “brain print”), and that this impact should be managed by media companies.²¹ This was followed up in [2020](#), where Christiana Figueres argued this is media’s cultural “superpower”.^{22,23} In [2025](#), we explored progress and remaining challenges in quantifying this impact.²⁴



- 18 WARC, *Global Ad Market Prospects Upgraded to 8%, but Growth Concentrated in Big Tech Platforms*, December 2025, https://www.warc.com/en/press/press-releases/25-12-11_global-ad-market-prospects-upgraded-to-8-but-growth-concentrated-in-Big-Tech-platforms
- 19 A comparison was undertaken of the ten largest companies by revenue in each category according to the definitions in this report of human-based and technology-based media for FY2025. The human-based media comparison included Comcast, The Walt Disney Company, Sony Group, Netflix, Warner Bros. Discovery, Paramount Skydance, Bertelsmann, Fox Corporation, Universal Music Group and News Corp. The technology-based media comparison included Amazon, Apple, Alphabet, Microsoft, Meta Platforms, ByteDance, Tencent, Spotify, Snap and Pinterest. Revenue and employee figures were obtained from the most recent company annual reports, investor relations disclosures and regulatory filings where available
- 20 Schibsted, *Editorial media as defenders of democracies: An analysis of the relationship between free media and democracies in Europe*, November 2024, <https://cdn.schibsted.com/wp-content/uploads/2024/11/25125955/Editorial-media-as-defenders-of-democracies.pdf>
- 21 Christian Toennesen, Simon Hodgson and Francis Mimmack, *Mirrors or Movers? Framing the debate about the impact of media content*, 2013, <https://responsiblemediaforum.org/downloadDocumentFile?document=142>
- 22 Rosie Towe, Daniel Witte and Christian Toennesen, *The Superpower of Media: Mirrors or Movers II*, 2020, <https://responsiblemediaforum.org/downloadDocumentFile?document=299>
- 23 Christiana Figueres was the former Executive Secretary of the United Nations Framework Convention on Climate Change (UNFCCC) in 2010–2016, the period when the Paris Agreement was negotiated
- 24 Imogen Crane, Daniel Witte and Miriam Davies, *Measuring Content Impacts in the Media Sector*, 2025, <https://responsiblemediaforum.org/downloadDocumentFile?document=452>

The Forum has developed six 'Impact Modes' to frame the ways in which media content affects society. Table 1 describes these and provides examples of media's cultural contributions.

Table 1: How media impacts society, seen through the RMF's Impact Modes

Impact Mode and Description	Issue and key media content	Organisation	Year	How the issue was covered	Impact
Questioning: Challenging existing practices and structures in society, highlighting adverse effects and bringing to light hidden information which leads to subsequent changes in policy or behaviour.	Post Office Horizon scandal: Mr Bates vs the Post Office		2024	ITV's four-part drama followed the journey of British sub-postmasters who had been wrongly accused of theft, fraud and false accounting due to a defective IT system, Horizon.	The drama brought the issue to public and political attention. A week after the programme aired, a million people had signed a petition calling to strip the former chief executive of the Post Office, Paula Vennells, of her CBE (Commander of the Order of the British Empire). This led to an official government response, where the prime minister announced legislation to exonerate and compensate victims. ²⁵
	Harvey Weinstein Sexual Misconduct Investigation		2017	An investigative report documented that at least eight women had accused Harvey Weinstein of sexual misconduct and abuse over nearly three decades.	The investigation triggered the global #MeToo movement, providing visibility to the scale of workplace harassment and abuse, leading to cultural and workplace changes. ^{26,27}
	Blue Planet II and its impact on plastic pollution		2017	Blue Planet II incorporated messages around the challenges of plastic pollution through a particularly powerful sequence in one out of the seven episodes. A significant part of the last episode focused on the impacts of plastic pollution on marine life.	Blue Planet II helped to catalyse the movement against single-use plastic in the UK and beyond with a surge in public concern over plastic pollution, changes in consumer behaviour, corporate and government commitment and action. ²⁴

²⁵ Greg Martin, Lauren O'Mahony and Rebecca Scott Bray, *Mr Bates vs the Post Office: mediating motion in the Post Office scandal and subpostmasters' campaign for justice*, <https://www.tandfonline.com/doi/pdf/10.1080/22041451.2025.2532211>

²⁶ Holly Corbett, *The #MeToo Movement Six Years Later: What's Changed and What's Next?*, Forbes, 16 November 2023, <https://www.forbes.com/sites/hollycorbett/2023/11/16/the-metoo-movement-six-years-later-whats-changed-and-whats-next/>

²⁷ Jodi Kantor and Megan Twohey, *Harvey Weinstein Paid Off Sexual Harassment Accusers for Decades*, The New York Times, 5 October 2017, <https://www.nytimes.com/2017/10/05/us/harvey-weinstein-harassment-allegations.html>

Impact Mode and Description	Issue and key media content	Organisation	Year	How the issue was covered	Impact
Campaigning: Deliberately taking a partisan stance on an issue, topic or product with the explicit aim of selling, changing behaviour or raising money.	Love Island x eBay partnership		2022	eBay partnered with the hugely popular reality dating show to become its primary sponsor. The campaign embraced a fundamental principle of communications, show don't tell.	The intention was to bring second-hand fashion into mainstream conversation and reach audiences who aren't engaging with second-hand shopping. Results from a survey to more than 1,500 adults launched to understand its impact found that as a result of the partnership, 3.1 million people were more aware of the impact of disposable fashion on the planet and more likely to shop sustainably. In addition, eBay data saw a 7,000% increase in searches for 'pre-loved clothes' and one item of clothing was sold every minute that the partnership was live. ²⁴



Image © Love Island

Impact Mode and Description	Issue and key media content	Organisation	Year	How the issue was covered	Impact
Inspiring: Stimulating action via changed perspectives, alternative futures or by highlighting different ways of behaving.	Don't Look Up	NETFLIX	2021	Don't Look Up used satire and an extinction-level comet impact to dramatize collective failure towards a response to climate change, using associated marketing to make the climate message more explicit.	A controlled trial by Rare found that watching the film shifted some climate-related beliefs, while watching the film with a climate-focused marketing video produced more consistent significant effects including increased perceived climate threat to society, worry, support for government action and self-reported likelihood to take action. ²⁸
	Hay Festival Programming	 Hay Festival Global	2026	Hay Festival convenes writers, performers, experts and audiences through live events and programming that brings major cultural, social and environmental questions into public discussion. Its 2026 programme included more than 500 events across 11 days, with events focused on new ideas, creativity, politics, science, reading and international perspectives.	The festival creates impact by bringing audiences into contact with new ideas and perspectives, using events as a shared space for debate, learning and cultural engagement. In 2026, the festival was described as a place to explore the world through performers, writers, experts and artists and as a space for sharing ideas and inspiration. ²⁹

²⁸ Rare, *The impact of Don't Look Up: shifting climate beliefs through blockbuster films and their marketing*, 24 September 2024, <https://rare.org/research-reports/the-impact-of-dont-look-up-shifting-climate-beliefs-through-blockbuster-films-and-their-marketing/>

²⁹ Hay Festival, *Hay Festival launches full programme for flagship event*, 21–31 May 2026, 9 March 2026, <https://www.hayfestival.com/news/blog.aspx?post=1822>

Impact Mode and Description	Issue and key media content	Organisation	Year	How the issue was covered	Impact
Silencing: Ignoring or restricting voices on certain topics, events or groups, knowingly or not with the effect of creating a particular representation of society which differs from the reality...	Thrive	   and other partners	2024	In partnership with the Mental Health Coalition, Thrive is an initiative that was founded by Meta, TikTok and Snap. The initiative allows online platforms to share signals about suicide or self-harm content and aims to prevent spreading across platforms, helping to identify and remove harmful content. ³⁰	Reduced the visibility and spread of content that could contribute to self-harm, while still allowing people to discuss their experiences and access support resources.
Amplifying: ...or, conversely, giving disproportionate voice to or coverage of certain topics, events or groups, again creating a particular representation of society which differs from the reality.	Meet the Superhumans		2012 onwards	Channel 4's Paralympics coverage and campaigns deliberately elevated disabled athletes and disability sport into mainstream primetime culture. The Meet the Superhumans 90 second advert reframed Paralympians as elite athletes and subsequent campaigns continued to challenge audience assumptions around disability and sport.	The London 2012 Paralympics became the first Paralympic Games to sell out, Channel 4's opening ceremony broadcast drew 11.8 million viewers, and 65% of viewers felt the coverage had a favourable impact on their perceptions of disabled people. ³¹
	GLOW		2025	Spotify celebrated LGBTQIA+ artists by providing editorial and promotional support, including featuring artists through playlists, marketing and community partnerships.	Increased visibility of LGBTQIA+ artists and stories within mainstream music culture. Spotify reported more than 30 million artist discoveries through the programme in 2024. ³²

³⁰ Thrive, Accessed 29 September 2026, <https://thrivesignals.org/about/>

³¹ D&AD, *Meet the Superhumans Case Study*, March 2014, <https://www.dandad.org/insights/awards/meet-the-superhumans-case-study-insights>

³² Spotify, *Wrapped: GLOW, RADAR and EQUAL Artists*, December 2025, <https://newsroom.spotify.com/2025-12-05/wrapped-glow-radar-equal-artists/>

Impact Mode and Description	Issue and key media content	Organisation	Year	How the issue was covered	Impact
Normalising: Introducing or legitimising forms of behaviour that may otherwise be unknown or marginal.	No Olvidarás Mi Nombre		2020	The Colombian telenovela addressed reconciliation in the aftermath of conflict and was developed after more than three years of research with expert organisations including the Victims Unit and the Attorney General's Office (la Unidad de Víctimas y la Fiscalía General de la Nación).	The show was proven to have improved peace and reconciliation in the aftermath of the 2016 Colombian peace treaty by a United States Agency for International Development (USAID) funded impact evaluation. ^{24,33}
	Kyle Kelly storyline on male suicide prevention	HOLLYOAKS	2020	The storyline depicted the aftermath of a male character's suicide and its impact on family and friends, alongside related mental health storylines.	The storyline aired during the 2020 pandemic and helped to amplify public conversation around organisations offering support for men. For example, the powerful episode encouraged the now mental health activist John Junior to open up and seek support from Samaritans when it aired, which he thanks for saving his life. ^{34,35}
Normalising: Introducing or legitimising forms of behaviour that may otherwise be unknown or marginal.	London Book Fair sustainability programming	London Book Fair & International Publishers Association	2024–2026	London Book Fair has used its industry convening role to promote sustainability through panels, keynotes, workshops and a Sustainability Hub. ³⁶	The fair helps normalise sustainability as a publishing-sector priority by giving it visibility within a major global industry event, creating space for publishers and partners to share practical approaches, common language and emerging standards for sector-wide change. ³⁷

33 Noticias RCN, *La ONU y el impacto social que generó la historia No Olvidarás Mi Nombre*, September 2018, <https://www.noticiasrcn.com/colombia/la-onu-y-el-impacto-social-que-genero-la-historia-no-olvidaras-mi-nombre-331025>

34 Channel 4, *Hollyoaks Confirm Male Suicide Storyline*, June 2020, <https://www.channel4.com/press/news/hollyoaks-confirm-male-suicide-storyline>

35 Julia Banim, *Hollyoaks Saved My Life – I've Saved Others*, The Mirror, September 2023, <https://www.mirror.co.uk/news/health/hollyoaks-saved-life-ive-saved-30866180>

36 International Publishers Association, *Spotlight on Sustainability at London Book Fair*, February 2024, <https://internationalpublishers.org/spotlight-on-sustainability-at-london-book-fair/>

37 Publishing Perspectives, *Sustainability at London Book Fair: The Publishing 2030 Accelerator*, March 2024, <https://publishingperspectives.com/2024/03/sustainability-at-london-book-fair-the-publishing-2030-accelerator/>

The distinction between human-based and technology-based media

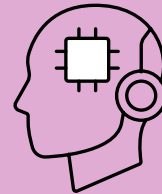
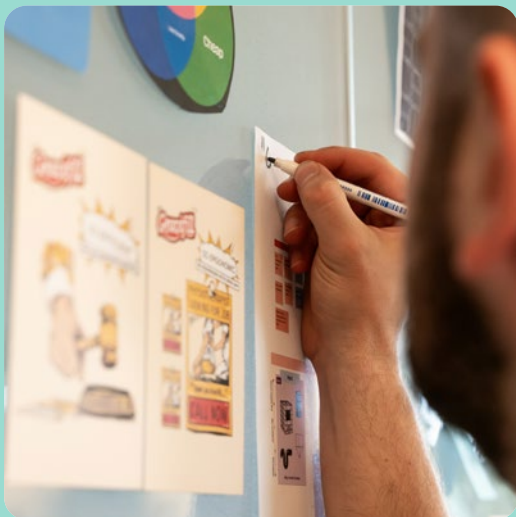
Media products and services are increasingly moving online or onto digital devices. Consequently, the way content is consumed and shared has changed rapidly, driven by the rise of the internet, the birth of social media and more recently, GenAI. These shifts have led to new companies entering into competition with existing media companies for eyeballs, ears, and – crucially – advertising revenue that can be generated from those consumers. Below, we propose two definitions to distinguish between these two types of media companies that are increasingly in competition with each other.



Human-based Media

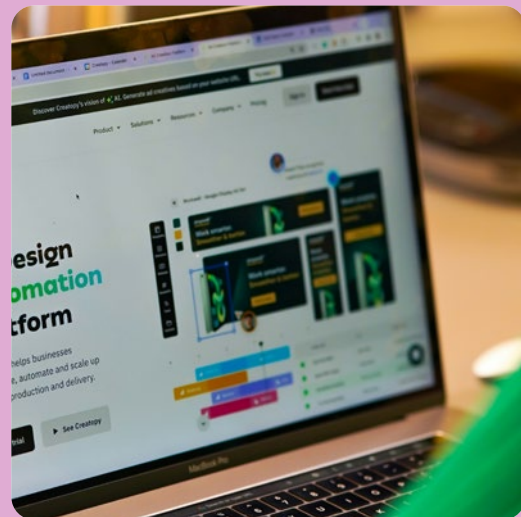
Human-based media companies exercise a high degree of control in, responsibility and accountability for, the creation and dissemination of content that is shared with their audience.

They enable the creation of content financially, either directly or by buying licensing rights from professional third-parties. Humans are central in exercising this judgment, although they may be assisted by technology.

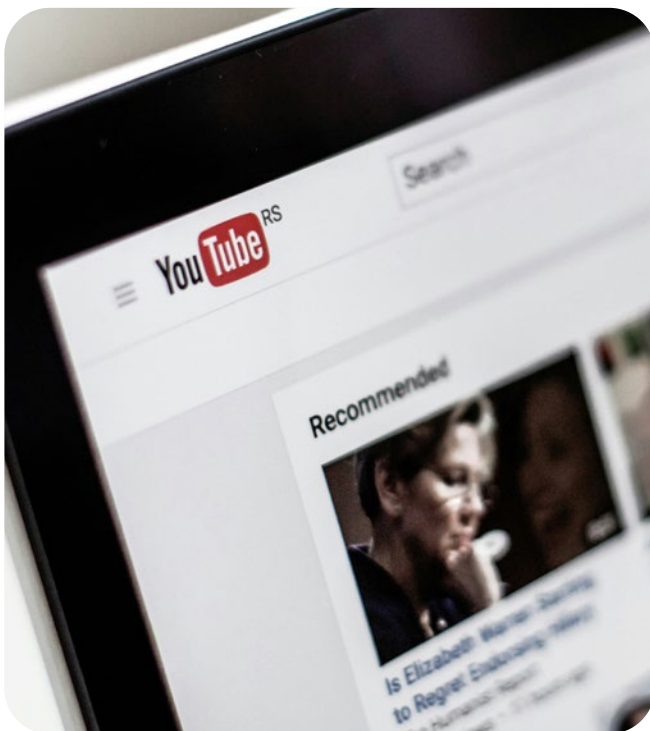


Technology-based Media

Technology-based media companies exercise a low degree of control in, responsibility and accountability for, the content that is created and shared with their users. They typically provide digital platforms for the dissemination of user-created content. Controls over this content rely heavily on algorithmic technology, although companies may employ humans to review cases and enforce safety policies.



The human involvement or review in the stages of creation, production and distribution of media content is one of the greatest distinctions between the two types of media defined above. Human-based media content often requires strict governance and human oversight. For example, public service broadcasters are required to follow strict standards. In the UK, broadcasters must follow the Ofcom Broadcasting Code.³⁸ In the EU, the Audiovisual Media Services Directive (AVMSD) coordinates EU-wide national legislation on all audiovisual media.³⁹ Adhering to these standards requires human editorial responsibility and control to ensure that content does not breach any of these rules. Advertisers must also follow regional frameworks and codes. In the United States of America (USA), the Federal Trade Commission mandates that advertisers must possess reasonable substantiation for performance claims before an ad is published, where human involvement plays a crucial role in verifying claims.⁴⁰ Technology-based media, particularly those that host user-generated content, do not exercise human input before they are published or uploaded. This may be changed by emerging regulation which requires technology-based media companies to make their platforms safer by design and protect users from illegal and harmful content through assessing the risks of harmful content on their platforms. The UK Online Safety Act is an example of this.⁴¹



Some might argue with our classification of technology-based social media companies as media. The companies themselves have certainly resisted the label, likely at least in part to avoid traditional publishing liabilities and regulations. We believe they are part of the media sector, and compete with human-based media, for three reasons:

1

They play a key role in content distribution.

Billions of people use their platforms to access information and entertainment. They compete with other media companies for audience and engagement.

2

They generate most of their revenue through selling advertising space, just like TV networks and newspapers. They compete with other

media companies for advertising revenue.

3

They play a role in shaping public opinion and the flow of information. They compete with

other media companies in shaping society.

³⁸ Ofcom, *The Ofcom Broadcasting Code*, December 2020, <https://www.ofcom.org.uk/tv-radio-and-on-demand/broadcast-standards/broadcast-code>

³⁹ European Commission, *Audiovisual and Media Services*, Accessed 2 September 2026, <https://digital-strategy.ec.europa.eu/en/policies/audiovisual-and-media-services>

⁴⁰ Sonia Dickinson-Delaporte et al., *Power and responsibility: Advertising self-regulation and consumer protection in a digital world*, Journal of Consumer Affairs, 2020, <https://onlinelibrary.wiley.com/doi/10.1111/joca.12295>

⁴¹ Department for Science, Innovation and Technology, *Online Safety Act: Explainer*, GOV.UK, April 2025, <https://www.gov.uk/government/publications/online-safety-act-explainer/online-safety-act-explainer>

Technology-based media is not just competing with human-based media; it is overtaking it both in content creation and dissemination as consumption habits change. Content creation itself is also evolving as video content that is consumed on social media is increasingly being produced by independent content creators rather than human-based media companies. This is increasingly enhanced by GenAI tools to help creators run their businesses.⁴² This further reduces reliance on traditional or human-based structures within media institutions.

For example, the 2026 Reuters Digital News Report found that, for the first time, social media and video networks are the most widely used way of accessing news online, with 54% of respondents in the 48 markets surveyed using them.⁸ In the UK, an Ofcom report found that less than half of young people (defined as those aged 15-24) watched live television each week in 2024, instead turning to social media platforms such as TikTok and YouTube.⁴³ This is enhanced by the increasing use of AI to replace search engines, reducing the direct accessing of website content, posing risks to human-based media companies that rely on Search Engine Optimisation (SEO) to drive traffic, and therefore revenue, to their content. When search results are delivered below an AI summary, a result that was previously ranked first could lose around 79% of its traffic.⁴⁴

79%

of traffic could be lost by a result that once ranked first when search results appear below an AI summary



⁴² China Widener et al., *2025 Digital Media Trends*, Deloitte, March 2025, <https://www.deloitte.com/us/en/insights/industry/technology/digital-media-trends-consumption-habits-survey/2025.html>

⁴³ Ofcom, *Media Nations 2025: UK Report*, 2025, <https://www.ofcom.org.uk/siteassets/resources/documents/research-and-data/multi-sector/media-nations/2025/media-nations-2025-uk-report.pdf?v=401287>

⁴⁴ Michael Savage, *AI summaries cause 'devastating' drop in audiences*, online news media told, July 2025, <https://www.theguardian.com/technology/2025/jul/24/ai-summaries-causing-devastating-drop-in-online-news-audiences-study-finds>



As digital platforms are emerging as the primary platforms for information, news and entertainment, they are also taking the majority share of advertising markets, where digital now takes 69% of the share.⁴⁵ Advertisers are becoming less reliant on agencies as they can place advertisements directly through technology platforms.⁴⁶ This can be credited to AI-powered personalisation algorithms which track consumer behaviours and collect individual data to deliver targeted content and advertisements.⁴⁷ These automated systems also prioritise user retention – and thus extreme and polarising content – over quality and reliability of content.⁴⁸ As a result, advertising revenue is being migrated towards technology-based media, and as primary channels for content distribution and monetisation, reducing funding for human-based media companies. For example, Google and Meta account for around half of digital advertising spending globally.⁴⁶

Human-based media companies are adapting their models to the digital age to stem the tide of declining engagement, while retaining the human-based structures that characterise them.⁴⁹ This includes strengthening relationships with audiences through subscription, membership and donation models, particularly those with strong brand loyalty. Subscription-based publishers may still see long-term profitability, while those depending on advertising and print face greater revenue impacts from the potential impact of AI-powered search.⁵⁰ For example, in 2024/25, The Guardian reported that digital revenues made up 72% of its total revenues, with revenue from digital readers also increasing by 21.7% compared to the previous year, demonstrating that adapting to digital readers is essential to ensure long-term financial viability.⁵¹ Alongside changing revenue models, news publishers are also using audience data to enhance engagement and personalise content, investing more in video, audio and newsletters, in addition to training staff to adapt to creator-led media. 76% of publishers surveyed in the 2026 Journalism and Technology Trends and Predictions report say they are trying to encourage their staff to behave more like creators, reflecting a shift towards this type of content.⁵⁰

45 Boston Consulting Group, *Is Traditional Advertising Dead?*, March 2025, <https://www.bcg.com/featured-insights/podcasts/imagine-this/traditional-advertising-dead>

46 Forum on Information and Democracy, *Ads for News, News for Ads*, March 2026, <https://informationdemocracy.org/wp-content/uploads/2026/03/Policy-Brief-FID-%E2%80%93-Ads-for-news-news-for-Ads.pdf>

47 Deloitte, *Digital Media Trends: Consumption Habits Survey*, March 2025, <https://www.deloitte.com/us/en/about/press-room/digital-media-trends-consumption-habits-survey.html>

48 Association of Commercial Television and Video on Demand Services in Europe, *Joint Statement on the European Democracy Shield*, Accessed 2 September 2026, <https://www.acte.be/publication/joint-statement-on-the-european-democracy-shield/>

49 Reuters, *Digital News Report 2025*, Reuters Institute for the Study of Journalism, 2025, https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2025-06/Digital_News-Report_2025.pdf

50 Nic Newman, *Journalism and Technology Trends and Predictions 2026*, Reuters Institute for the Study of Journalism, 2026, https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2026-01/Trends_and_Predictions_2026.pdf

51 The Guardian Media Group, *Annual Report 2024/25*, September 2025, <https://www.theguardian.com/gnm-press-office/2025/sep/11/the-guardian-media-group-publishes-2020425-annual-report>

What value does media create for society?

We categorise the value that media drives for society through three pillars: **Societal**, **Economic**, and **Democratic**. We describe the identified value themes under each category, and define what drives that value. For each driver, we describe whether this is created or amplified⁵² by human-based and/or technology-based media.

Human-based Media



Creates value driver



Amplifies value driver

Technology-based Media



⁵² The creation of a value driver is originating the source of that value, whereas amplification of that value driver is increasing the impact of that driver, for example by reaching and impacting more people

Societal

Social cohesion

Representation of diversity in society



Raising awareness of social issues



Fostering connection between people



Supporting understanding others' perspectives and experiences



Bring people together to form a sense of community



Unification of society around key moments and events



Support and benefit society through technology



Cultural preservation

Representation of diversity in society



Investment in and promotion of local culture and talent



Education and Life-long learning

Investment in arts and creativity



Fostering media and digital literacy



Exposure to critical thinking, different viewpoints and debates



Lifelong exposure to interest and skills



Entertainment

Delivering high-quality content with social relevance



Discover new content and experiences



Economic

Direct economic value creation

Revenue for media itself and brands through advertising



Creation of employment and high-skill jobs



Create economic opportunities for businesses and individuals



Indirect economic value creation

Fostering and encouraging local talent



Revenue generation for creative industries globally



Support the creator economy (user-generated content)



Investment in technology innovation to enhance user experience



Investment in technological research and development



Access to reliable information



Bringing stability to financial markets and helping to target investment



Democratic

Understanding the world

Independent and high-quality gathering and sharing of information and analysis



Fact-based, verifiable and accurate interpretation of the world that drives truth and trust



Enabling citizenship

Independent and high-quality gathering and sharing of information and analysis



Fact-based, verifiable and accurate interpretation of the world that drives truth and trust



Exposure to critical thinking, differing viewpoints and debates



Providing content that is accessible to all



Protection of electoral integrity



Holding power to account

Independent and high-quality gathering and sharing of information and analysis



Fact-based, verifiable and accurate interpretation of the world that drives truth and trust



Protecting citizens

Keep users safe and protect them from harmful content



Societal

Social cohesion

Social cohesion is described as “broadly speaking (...) the ‘glue’ that binds society together” by the United Nations Economic Commission for Europe (UNECE).⁵³ The Organisation for Economic Cooperation and Development (OECD) defines a cohesive society as one that “works towards the well-being of all its members, fights exclusion and marginalisation, creates a sense of belonging, promotes trust, and offers its members the opportunity of upward social mobility”.⁵⁴ A recent academic review of different perspectives and studies on social cohesion defines it as “the ongoing process of developing well-being, sense of belonging, and voluntary social participation of the members of society, while developing communities that tolerate and promote a multiplicity of values and cultures, and granting at the same time equal rights and opportunities in society.”⁵⁵ We conclude that social cohesion is about togetherness, belonging and trust in society, across groups with different values and cultures.



Representation of diversity in society



Representation of diversity in society drives social cohesion because it creates a sense of belonging for different communities, and counters exclusion and marginalisation.

Human-based media companies create this value driver through mandatory and voluntary targets, commitments and programmes to represent their audiences, and by extension, diversity in society. Particular requirements are placed on public-service broadcasters: in the UK, “Ofcom states that TV and radio programmes should reflect the experiences of everyone in society, regardless of background”.⁵⁶ Initiatives such as Project Diamond⁵⁷ (broadcast) and EqualVoice⁵⁸ (publishing) track representation of minority groups in media content and hold the industry to account.

While technology-based media companies may also create space for representation of diversity, they do not have explicit programmes or targets to do so.

Raising awareness of social issues



Human-based media companies create this value driver through investigative journalism and reporting, documentaries focusing on social issues, and by integrating social issues in entertainment. The media sector has also been criticised by some for focusing too much on certain social issues, or neglecting others.

Technology-based media companies amplify this value driver by providing a platform enabling individuals to share social issues that matter to them and re-sharing those shared by others.

53 UNECE, *Social Cohesion: Concept and Measurement*, December 2023, <https://unece.org/statistics/publications/social-cohesion-concept-and-measurement>

54 OECD, *Social Cohesion*, Accessed 24 August 2026, <https://www.socialcohesion.info/concepts/concept/oecd>

55 Xavier Fonseca, Stephan Lukosch and Frances Brazier, *Social cohesion revisited: a new definition and how to characterize it*, *Innovation: The European Journal of Social Science Research*, 2018, <https://www.tandfonline.com/doi/full/10.1080/13511610.2018.1497480#d1e560>

56 Ofcom, *Diversity and Equal Opportunities in Television and Radio*, December 2023, <https://www.ofcom.org.uk/tv-radio-and-on-demand/equity-and-diversity/diversity>

57 Creative Diversity Network, *Diamond*, Accessed 24 August 2026, <https://www.creativediversitynetwork.com/diamond>

58 Ringier, *EqualVoice*, Accessed 24 August 2026, <https://www.equalvoice.ch>

Fostering connection between people



Human-based media companies create this value driver by creating content that connects people with each other, for example through creating a shared social experience or acting as a tentpole to help start conversations.

Technology-based media companies create this value driver by providing platforms and tools that help people connect with others, especially in cases where people cannot meet physically. We expect it has less of an impact on social cohesion, as people often already know each other (e.g. family members or friends) or are from similar backgrounds and have similar interests due to algorithms.

Supporting understanding others' perspectives and experiences



Human-based media companies create this value driver by sharing perspectives and experiences from a variety of groups in society.

As technology-based media companies use algorithms to show content based on a user's interests and prior history, they do not create or amplify this value driver.

Bring people together to form a sense of community



Human-based media companies create this value driver through community-focussed products and services, such as local newspapers. Successful pieces of content can also create shared experiences which can disarm people and give them something to talk to others about.

Technology-based media companies create this value driver by enabling the creation of online communities around certain interests, such as hobbies, or tied to specific locations.

Unification of society around key moments and events



Human-based media companies create this value driver through providing content around key moments, which can include big sporting events such as the Olympic games or football world cups, as well as national milestones such as birthdays and moments of remembrance.

Technology-based media companies create this value driver through enabling users to share content about their participation in key moments and events.

Support and benefit society through technology



Technology-based media companies create this value driver by using the power of technology to provide information and services that benefit society. Microsoft's Tech for Society programme uses technology "to strengthen the institutions and values that help societies thrive". For example, by creating strong partnerships which strengthens local media, promoting civic engagement in their products and protecting digital infrastructure that support democratic institutions.⁵⁹ Google commits to improving the lives of as many people as possible using their technology. This includes funding to support education and training, where Google.org-supported organisations have reached 15 million learners with training for media literacy and online safety.^{60,61} Anthropic strives to "act for the global good", developing AI systems that maximise positive outcomes for humanity by integrating safety, reliability and interpretability into its models.⁶²

While human-based media companies also develop technology, this is typically used to strengthen the creation and distribution of content, and the audience's ability to engage with that content. Therefore they do not contribute to this value driver.

⁵⁹ Microsoft, *Tech for Society*, Accessed 3 September 2026, <https://www.microsoft.com/en-us/corporate-responsibility/trusted-technology-group/tech-for-society>

⁶⁰ Google.org, *Google.org Impact Report 2025*, 2025, <https://www.google.org/impact-report>

⁶¹ Google, *Commitments*, Accessed 3 September 2026, <https://about.google/company-info/commitments/>

⁶² Anthropic, *Making AI systems you can rely on*, Accessed 3 September 2026, <https://www.anthropic.com/company>

Cultural preservation

Representation of diversity in society



Representation of diversity in society drives cultural preservation by supporting awareness of, appreciation for, and preservation of diverse and marginalised groups.

See above, under Social cohesion, for how human-based and technology-based media companies contribute to this value driver.

Investment in and promotion of local culture and talent



Human-based media companies create this value driver by either directly investing in local culture and talent, or sharing content that promotes investment indirectly by other groups.

Technology-based media companies create this value driver by providing monetisation opportunities for local talent and enabling local communities to share their local culture, which can indirectly lead to investment.

Education and life-long learning

Investment in arts and creativity



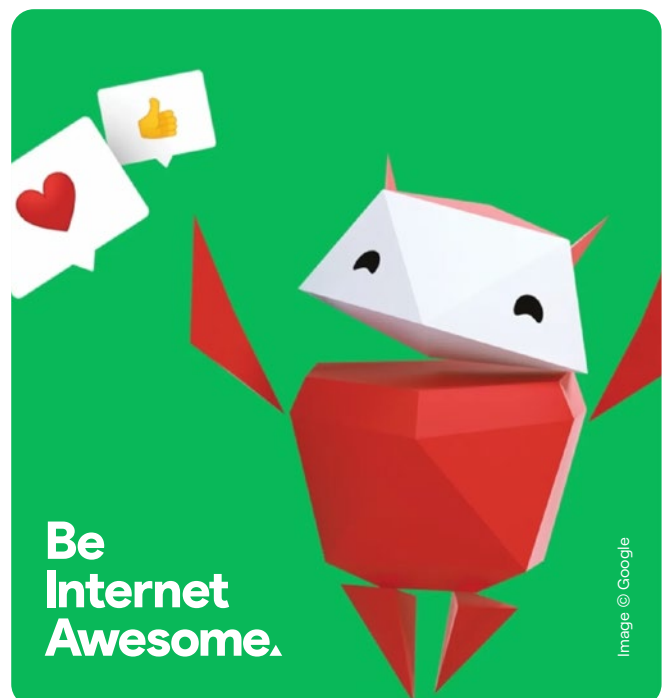
Human-based media companies create this value driver by directly investing in the arts and creativity through content, as well as through fostering individuals' own creativity.

Technology-based media companies create this value driver by fostering individuals' own creativity, and allowing them to share this with their followers and communities.

Fostering media and digital literacy



Human-based and technology-based media companies create this value driver through voluntary programmes aimed at driving digital literacy. For example, as a human-based media company, the BBC delivers specific courses on BBC Bitesize aimed at digital and media literacy. Through its "Solve the Story" series, BBC equips students and adults with critical thinking skills needed to navigate misinformation and emerging technologies safely.⁶³ Similarly, as a technology-based media company, Google operates a programme called "Be Internet Awesome" aiming to help children become safe, confident, and responsible internet users by developing practical skills in online privacy and security, critical thinking, and respectful behaviour.⁶⁴



⁶³ BBC Media Centre, *BBC Bitesize Launches Media Literacy Series to Help Teens Separate Fact from Fiction Online*, 2026, <https://www.bbc.com/mediacentre/2026/bbc-bitesize-launches-media-literacy-series-to-help-teens-separate-fact-from-fiction-online>

⁶⁴ Google, *Be Internet Awesome*, Accessed 4 September 2026, https://beinternetawesome.withgoogle.com/en_ie/

Exposure to critical thinking, different viewpoints and debates



Critical thinking drives educational value by enabling people to question the world around them.

Human-based media companies create this value driver by creating content that practices critical thinking, explores different viewpoints on issues, and allows those viewpoints to be argued through debates. This helps their audience develop and practice their critical thinking muscles.

While technology-based media companies can create this value driver by exposing their users to other viewpoints, this is not by design and depends on the user's engagement with the platform, which determines what content is shown to the user through the algorithm. Algorithms tend to show users content that they are likely to agree with, due to being based on previous positive interactions and the profile that is built up of someone's interests and values.

Lifelong exposure to interest and skills



Human-based media companies create this value driver through providing content that is linked to specific interests and hobbies.

Technology-based media companies create this value driver through providing communities that are linked to specific interests and hobbies, where users can share relevant content with each other.

Entertainment

Delivering high-quality content with social relevance



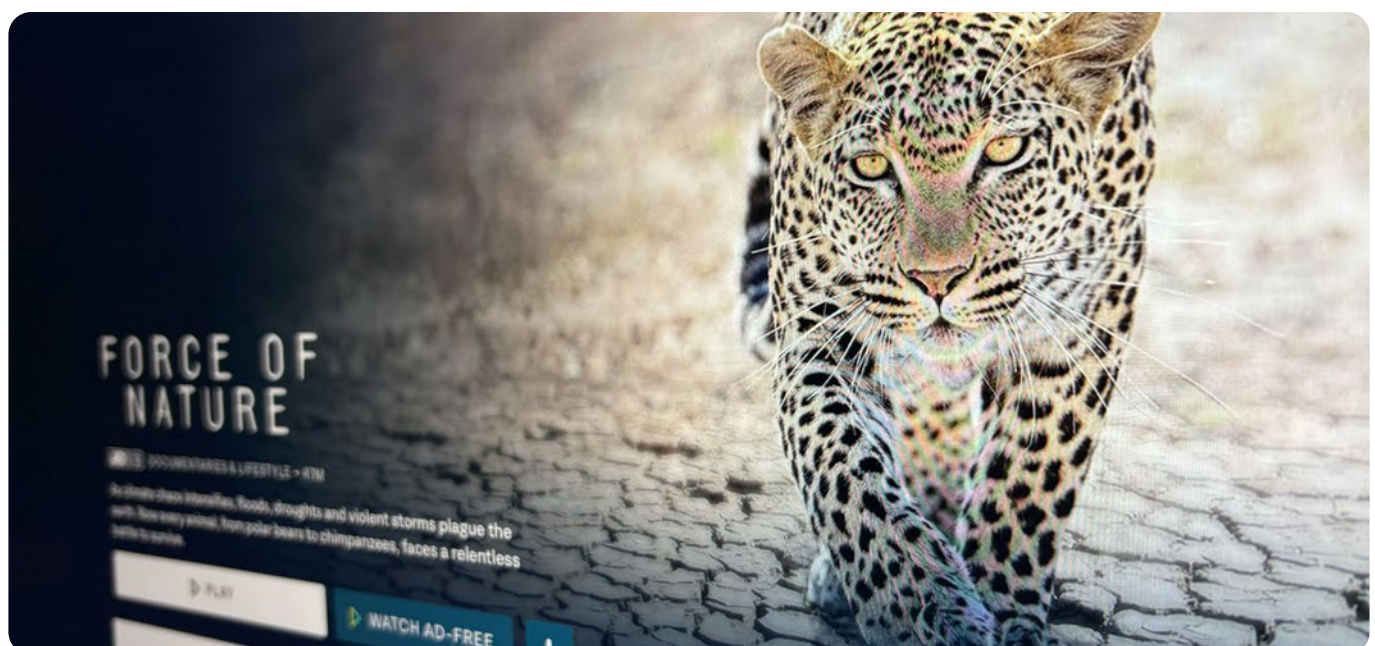
Human-based media companies create this value driver through creating content that entertains and links to socially relevant issues. For instance, ITV's series "Force of Nature" demonstrates how extreme weather affects the animal kingdom through its visual storytelling and by highlighting the consequences of anthropogenic climate change. Another example is The Economist's "World Ahead" series, which identifies influential political, economic, technological and social trends in the coming year.⁶⁵ It includes analyses on topics like climate change, inequality, migration, gender and social tensions, framing them alongside geopolitical and economic developments.

Technology-based media companies create this value driver by allowing users to create and share entertaining content with social relevance.

Discover new content and experiences



Human-based and technology-based media companies create this value driver by introducing their audiences and users to new stories, places, and activities that enrich their lives.



⁶⁵ The Economist, *The World Ahead 2026*, 2026, Accessed 4 September 2026, <https://www.economist.com/topics/the-world-ahead-2026>

Economic

Direct economic value creation

Revenue for media itself and brands through advertising



Human-based and technology-based media companies create this value driver by monetising their content through varying strategies – some companies charge a fee to access content, others generate revenue through advertising, and many companies apply a combination of the two. Media companies that carry advertisements also generate economic value for the brands that advertise their products and services, as well as the agencies that design the ads. While this creates a positive impact in terms of economic value generated, there are negative consequences in the link between advertising and unsustainable consumption. For example, Advertised Emissions, where there is an uplift in Greenhouse Gas (GHG) emissions because of increased sales from advertising.⁶⁶ There are also concerns around retaining affordability of high-quality news and information.

Creation of employment and high-skill jobs



Human-based media companies create this value driver through generating jobs in the creative industries, such as film making, journalism, and publishing. They also generate jobs in other sectors, including technology and managerial roles.

Technology-based media companies create this value driver through generating jobs in technology industries, such as software development, as well as general managerial roles.

Create economic opportunities for businesses and individuals



Human-based media companies create this value driver through making businesses and places desirable through including them in shows, either through paid product placement or as part of scripts.

Technology-based media companies create this value driver through enabling businesses and individuals to monetise content and reach new potential customers.

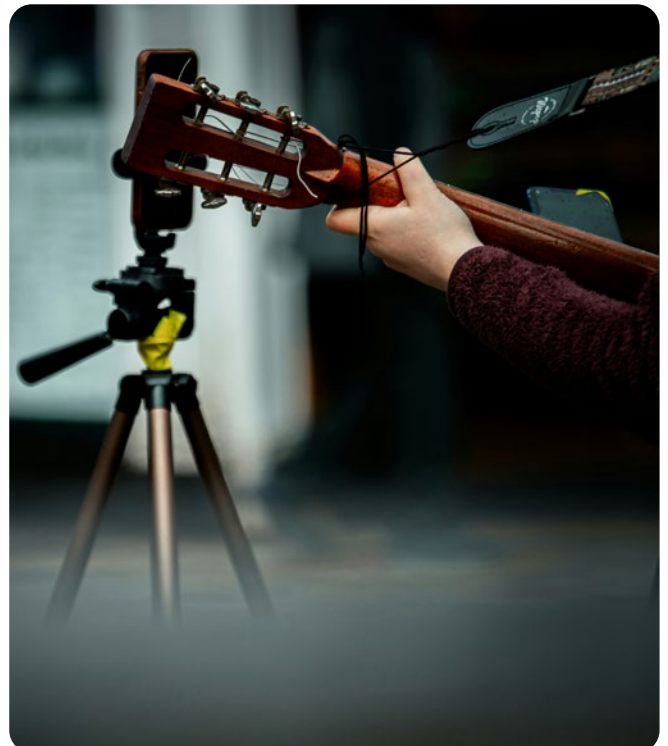
Indirect economic value creation

Fostering and encouraging local talent



Human-based media companies create this value driver through providing opportunities for individuals to showcase their talent, for example in sports, music or entertainment shows. However, some talent shows have faced allegations (in some cases confirmed) of inappropriate behaviour, and there are risks around the effective implementation of media companies' duty of care.

Technology-based media companies also create this value driver through providing those opportunities, which enable people to directly showcase their talent online.



Revenue generation for creative industries globally



Human-based and technology-based media companies create this value driver through introducing people to the outputs of creative industries, such as music, film, and books.

Support the creator economy (user-generated content)



Technology-based media companies create this value driver through enabling creators to monetise their content and grow their brand.

Human-based media companies do not create or amplify this value driver as they do not typically work directly with creators.

Investment in technology innovation to enhance user experience



Technology-based and human-based media companies create this value driver through investing in technology innovation, leading to new features and tools that improve the user experience and increase the value the user receives from engaging with the media brand's content. The scale of investment in innovation in technology-based media companies far outpaces that in human-based media companies, and the gap is accelerating through the recent boom of investment in AI. While this value driver is defined in a limited scope to focus on improvements to user experience, there are questions about the return on investment, and (in the case of AI) concerns over the environmental and social impacts.

Investment in technological research and development



Technology-based media companies create this value driver through investment in technological research and development, which in turn can drive economic growth.

Human-based media companies do not create or amplify this value driver as they do not directly invest in technological research and development.

Access to reliable information

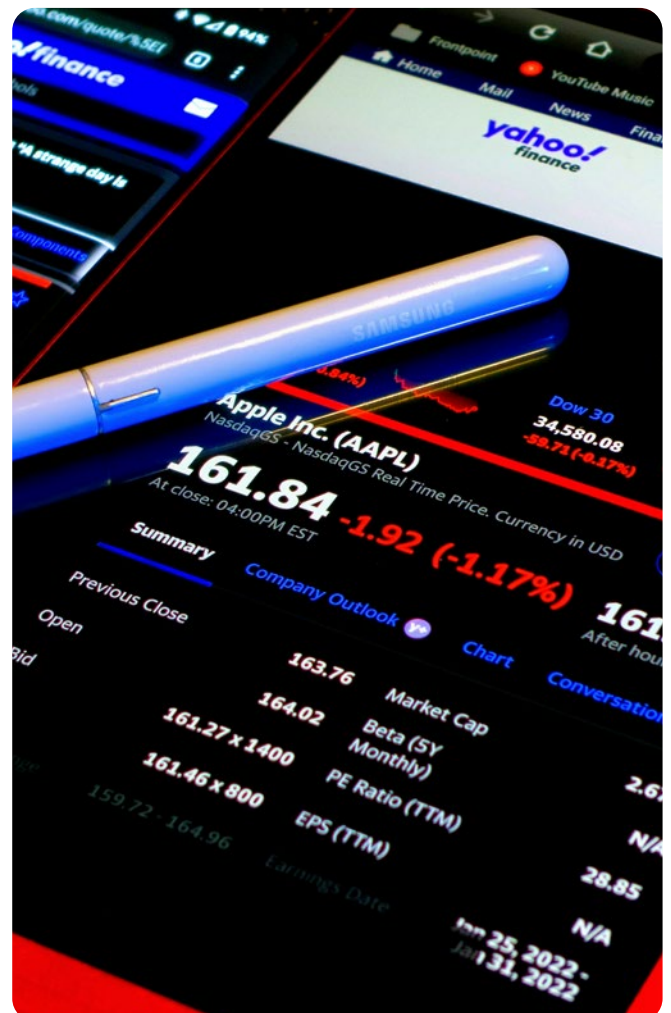


Access to reliable information is “the fundamental resource that fuels our 21st century economy.” Every sector of society relies upon robust and factual information, and this will only become more important in the AI-driven economy of the future.¹² Human-based media companies create this value driver through playing an essential role in guaranteeing the supply of reliable information and ensuring its quality. While technology-based media companies can help amplify reliable information, they do not inherently provide it.

Bringing stability to financial markets and helping to target investment



Human-based media companies create this value driver by exposing potential risks (such as exposing corruption and corporate fraud) to financial markets, strengthening investor confidence and reducing market distortions, and helping governments and individuals to make informed investments in areas of real societal need. Technology-based media companies do not inherently expose potential financial risks.



Democratic

Understanding the world

Independent and high-quality gathering and sharing of information and analysis



Independent and high-quality information and analysis helps citizens understand the issues facing their society and how government and businesses are approaching them. Human-based media companies create this value driver through investigative journalism, documentaries, books and other content formats that analyse the world around us and share that analysis with their audience. Through this content, they create a shared public understanding of important issues. This is necessary for constructive dialogue to take place in society.²⁰ Independent, high-quality political news increases accountability and improves political outcomes.¹²

Technology-based media companies can amplify this value driver by allowing users to share information and analysis. They can help high-quality journalism and other content reach new audiences.

Fact-based, verifiable and accurate interpretation of the world that drives truth and trust



Fact-based, verifiable and accurate interpretation of the world helps people understand how the world works and gives them factual information they can use in their day-to-day lives. For example, fact-based and accurate information can generate popular support for good policies, for example on appropriate taxation levels and the size of national debt, support and respect for science and public health interventions and other welfare-promoting behaviours. It also helps policymakers and regulators understand the issues they are tackling, enabling better and more effective regulation.

Human-based media companies create this value driver through editorial policies and processes that lead to fact-based, verifiable and accurate content.

Technology-based media companies can amplify this value driver by letting users share information. They can enable high-quality reporting to reach new audiences. They can also support their users' understanding of facts and context through fact-check and context adding features.

Enabling citizenship

Independent and high-quality gathering and sharing of information and analysis



An understanding of the issues facing society and the potential solutions being put in place by governments and businesses helps citizens form an opinion of how effectively their government is running their country.

For an analysis of how human-based and technology-based media companies contribute to this value driver, see page 26 – Democratic – Understanding the world.

Fact-based, verifiable and accurate interpretation of the world that drives truth and trust



Factual information about the world around us helps citizens engage in democratic society and the political process.

For an analysis of how human-based and technology-based media companies contribute to this value driver, see page 26 – Democratic – Understanding the world.

Exposure to critical thinking, differing viewpoints and debates



Critical thinking enables citizenship by supporting people to question democratic structures and engage effectively in the democratic process. For a description of how human-based and technology-based media companies contribute to this value driver, see page 23 – Societal – Education and life-long learning.

Providing content that is accessible to all



Human-based media companies create this value driver by adding accessibility features to content, such as closed captioning and sign language interpretation. Public service media companies provide content that is accessible to all members of the society that funds them; other media companies may choose to make certain pieces of content available for free. Higher equality in the public dissemination of information reduces social divides and enables participation in the democratic process.

Technology-based media companies create this value driver through accessibility features such as subtitling. They are typically free to use, although increasingly some offer paid-for professional subscriptions.

Protection of electoral integrity



Human-based media companies create this value driver through reporting on the electoral process, holding governments accountable and helping citizens understand it better, driving trust.

Technology-based media companies do not create or amplify this value driver as they do not typically observe or report on elections directly.

Holding power to account

Independent and high-quality gathering and sharing of information and analysis



Providing independent and reliable information on the decisions political and business leaders take, and their impacts on society, enables citizens to hold those leaders to account. Such accountability promotes good governance and more sustainable and inclusive economic development. Media freedom has been shown to be significantly associated with better institutional performance, meaning more effective governments and better public service delivery, which in turn enable equitable economic growth.⁶⁷

For an analysis of how human-based and technology-based media companies contribute to this value driver, see page 26 – Democratic – Understanding the world.

The Panama Papers investigation has led to tax agencies around the world recovering a total of USD \$1.86 billion.⁶⁷

Fact-based, verifiable and accurate interpretation of world that drives truth and trust



Factual information on how the decisions political and business leaders take are impacting society holds them to account on the impact of their actions, and helps citizens understand their effectiveness.

For an analysis of how human-based and technology-based media companies contribute to this value driver, see page 26 – Democratic – Understanding the world.

Protecting citizens

Keep users safe and protect them from harmful content



Technology-based media companies create this value driver through having systems to review and remove harmful content, as well as providing software tools that help users stay safe online. Children are a particularly vulnerable group and the focus of many safety tools, including providing parents with additional features to help keep their child safe. Many argue that technology-based media companies have not done enough in this area, shown in lawsuits across different jurisdictions in an effort to hold tech companies to account.⁶⁸ In the latest US action, Meta agreed to pay up to \$18 billion to settle claims that Facebook and Instagram harmed young users and pledged to introduce built-in safety features such as time limits, night-time lockouts, and hidden likes for teens.⁶⁹ As a result, some countries like Australia⁷⁰ have already implemented legislation to restrict access to social media for certain age groups and force companies to put in place additional safety features, while other countries like the United Kingdom⁷¹ are following suit.

Human-based media companies are characterised by much higher oversight and control over the content that is shared with their audiences, and therefore have less need to keep users safe from harmful content.



⁶⁷ UNESCO, *World Trends in Freedom of Expression and Media Development: Global Report 2021/2022*, <https://unesdoc.unesco.org/ark:/48223/pf0000389301>

⁶⁸ Brandon Drenon and Max Matza, 'Not Far Enough': Parents and Teens on Meta's New Limits for Young Users, BBC News, August 2025, <https://www.bbc.co.uk/news/articles/cx2zn9zj361o>

⁶⁹ Imran Rahman-Jones and Kali Hays, *Meta to Pay up to \$18bn to Settle Claims its Platforms Harm Children*, BBC News, August 2026, <https://www.bbc.co.uk/news/articles/cd68q3wynnqo>

⁷⁰ Helen Livingstone, *How Does Australia's Under-16 Social Media Ban Work?*, November 2025, <https://www.bbc.co.uk/news/articles/cwyp9d3ddqyo>

⁷¹ UK Government, *Social Media to be Banned for Under-16s in Landmark Government Move to Give Kids Their Childhood Back*, GOV.UK, 2026, <https://www.gov.uk/government/news/social-media-to-be-banned-for-under-16s-in-landmark-government-move-to-givekids-their-childhood-back>

Conclusion: safeguarding and growing this value

Human-based media companies drive a lot of **societal** value through representing diversity, raising awareness of social issues and helping people understand other perspectives. This is not always easy in the era of culture wars and with the increasing politicisation of certain issues, and pressure on media to align with certain political angles and narratives. The RSF World Press Freedom Index and Freedom House Freedom in the World Index both show a deterioration of press freedom around the world over the past decade.¹² Governments and media regulators should avoid acting in a way that harms media companies' ability to remain free from such influence, while ensuring they do not silence certain minority groups.

The value that technology-based media companies create could be increased if they were incentivised to design their algorithms in a way that does not generate a filter bubble but connects people with different backgrounds, viewpoints, and values in a way that stimulates positive and constructive engagement. Measures to stimulate economic investment in local culture, the arts and creativity would also help increase the value generated in this area.

Governments and media regulators should avoid acting in a way that harms media companies' ability to remain free from influence

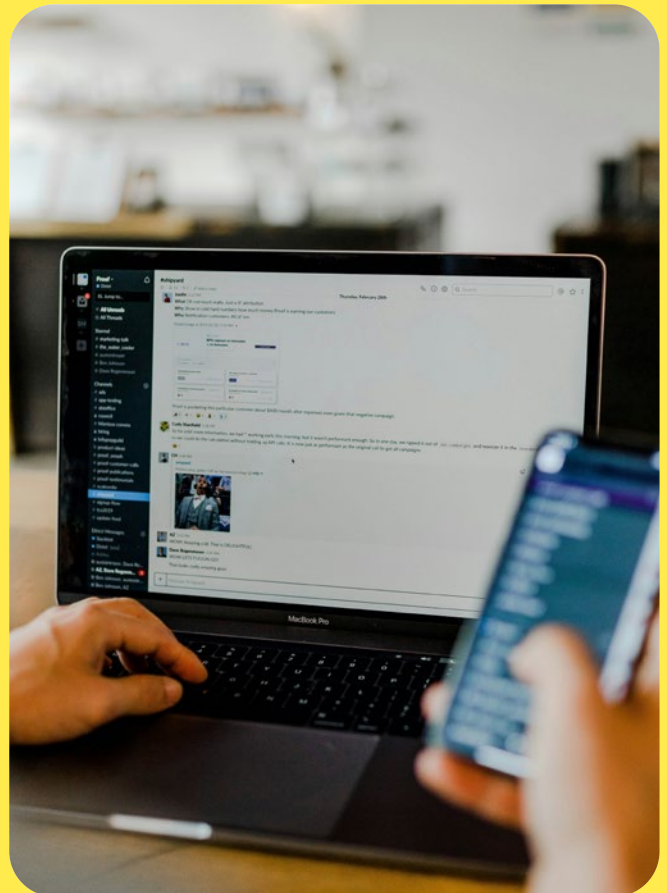


Both human-based and technology-based media companies generate a substantial and growing amount of **economic** (see page 4 – [Introduction](#)). Yet technology-based media companies are capturing an increasing share of the economic pie, leaving human-based media companies with a decreasing ability to capture the benefits of the value they create. A coherent set of policies is necessary to adjust the economic scales. To safeguard the high quality content that human-based media companies provide, and ensure their long-term economic sustainability, advertising markets should be encouraged to invest in high-quality, trustworthy and reliable content. This could be done through tax credits, providing all citizens with financial support to access high-quality information, requiring a portion of advertising spend to benefit human-based media, mandating transparency across the advertising market supply chain, and enabling human-based media to register as such in advertising markets.⁷² Tighter and expanded copyright laws could ensure that technology-based media companies do not free ride on the value created by human-based media companies. Australia, Canada, and Indonesia have already introduced regulations to this effect.^{72,73,74} Additionally, measures to stimulate the creative and technological industries such as the UK Government's Creative Industries Sector Plan which aims to strengthen the UK's creative industries can strengthen companies' competitive positions globally.⁷⁵ Across borders, a higher share of overseas development support should go to support independent, high-quality media.

Human-based media companies play a key role in supporting and enabling **democratic** society. They help citizens understand the world, the particular issues facing their society, and how politicians and business leaders are tackling them. That understanding enables citizens to engage with the democratic process and hold those in positions of power to account.

A coherent set of policies is necessary to adjust the economic scales

The most fundamental attribute that human-based media companies need to enable them to do this effectively is independence. Independence helps to protect editorial content from external influences, which helps to foster values such as transparency and freedom of expression, while offering diversity to ensure different viewpoints are visible and given a fair representation. A diverse and independent media landscape, in turn, fights misinformation and enables a shared understanding of facts which is necessary for constructive dialogue. Strategies to ensure high-quality, fact based and verifiable information is freely available to all ensures this value is generated for all of society and avoids the pitfalls of an inequitable information landscape. This can be done through funding strong public service media, as well as through targeted subsidies. Technology-based media companies can provide a space for democratic debate, but current algorithmic designs can also keep users inside their own filter bubble and promote extremist content. Therefore, pushing for changes in these algorithms to stimulate more democratic debate could strengthen the contribution of these companies to democracy.



72 Australian Communications and Media Authority, *News media bargaining code*, Accessed 4 September 2026, <https://www.acma.gov.au/news-media-bargaining-code>

73 Government of Canada, *The Online News Act*, Accessed 4 September 2026, <https://www.canada.ca/en/canadian-heritage/services/online-news.html>

74 Cabinet Secretariat of the Republic of Indonesia, *Gov't Issues Regulation on Publisher Rights*, 2024, <https://setkab.go.id/en/govt-issues-regulation-on-publisher-rights/>

75 Department for Culture, Media and Sport, *Creative Industries Sector Plan*, GOV.UK, <https://www.gov.uk/government/publications/creative-industries-sector-plan>

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Appendix A

External stakeholder interviews:

Name	Job Title	Organisation
Ben Page	Visiting Professor	King's College London
Nathan Fabian	Chief Policy & Research Officer	Principles for Responsible Investment
Emma Gruden	Policy Officer in Media and Big Tech	Forum on Information Democracy
Dorien Verckist	Senior Media Analyst and Public Value Lead,	European Broadcasting Union
Florence Hartmann	Media Intelligence Service Manager	European Broadcasting Union
Celia Zafra	Head of Communications	Political Watch
Pamela Noakes	Global Sustainability Director	M&C Saatchi
Aurelija Gackaite	Communication & Marketing Manager	EGTA (Association of television and radio sales houses)
Katty Roberfroid	Director General	EGTA (Association of television and radio sales houses)
Sofie Sue Rutgeerts	Senior Manager of Industry Insights	EGTA (Association of television and radio sales houses)
Hannah Harrison	Chief Sustainability Officer	WPP
Felicity McLean	Director of Sustainability Partnerships and Engagement	WPP



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