



WHO OWNS THE UK MEDIA?

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INTRODUCTION

What does it mean to have a ‘free’ media when the nation’s social media platforms, TV channels, newspapers, radio stations and streaming services are owned by a handful of giant corporations? Is our media truly independent if many of our most influential news organisations are controlled by individuals and Boards pursuing vested interests? How can we stay informed about pressing issues in our communities when local news sources are being cut, closed down or merged into online outlets with no grounding in the places they report on?

This report is the Media Reform Coalition’s fourth study on media ownership in the United Kingdom, covering data for the period since our last report in March 2019. During this time the Coronavirus pandemic has clearly brought major challenges and changes to all parts of society, and the media industries are no exception. Circulation of national and local newspapers suffered a precipitous decline during the first national lockdown in Spring 2020, while streaming services and social media have become increasingly central to how people access and consume media content every day. However, these changes have not lessened the crisis of ownership in UK media and our findings suggest that in many areas media concentration has become even worse. The same issues that beset UK media before the pandemic—declining trust in journalism, the spread of misinformation, collapsing funding for local news, fragmenting audiences for ‘traditional’ media—are even more pronounced today.

The key findings of this short report demonstrate the endemic problem of concentrated ownership across the UK media landscape:

Just three companies—DMG Media, News UK and Reach—dominate 90% of the national newspaper market, up from 83% in 2019. When online readers are included the same companies control a three-fifths market share amongst the major newspaper groups, giving these publishers a strong position for setting the agenda for the rest of the news media.

83% of UK local newspapers are controlled by just six companies. The three largest local publishers—Newsquest, Reach and JPI Media—each control a fifth of local press market, more than the share of the smallest 50 local publishers combined.

Facebook controls three of the top five social media services used to access online news in the UK. Traditional news organisations account for 48% of Facebook users' news sources, expanding the online market reach of a few already-dominant publishing companies.

While Sky remains the UK's dominant pay-TV provider with 8.3 million customers, across all households with at least one SVOD subscription 87% are Netflix customers (14.2 million) and more than half subscribe to Amazon Prime Video (9.1 million).

Two companies—Bauer Radio and Global Radio—own 70% of the UK's 279 local commercial analogue radio stations—a 20% increase in concentration since 2018. Similarly, three-quarters of the national commercial DAB market is controlled by Bauer, Global and Wireless Radio.

The shrinking of UK media ownership into fewer and fewer hands has not happened naturally. Large companies continue to enhance their dominant market positions through mergers and takeovers of their smaller rivals. In early 2019 Bauer Radio acquired around 50 local radio stations from Celador, UKRD, Lincs FM and Wireless Radio, doubling its number of stations to become the largest local radio broadcaster with a 38% market share. In November 2019 DMG Media (publishers of the Daily Mail and Metro) purchased the i newspaper from JPI Media, increasing the company's combined share of print circulation by 3%. Neither the communications market regulator Ofcom nor the Competitions and Markets Authority considered that these takeovers—which gave two already powerful media companies an even greater share of their respective markets—posed any threat to UK media plurality.

The Coronavirus pandemic has accelerated the long-term decline in both circulation and advertising revenues in the local press industry. Job cuts and closures are now commonplace and since 2005 publishers have closed as many as 295 local newspapers—shrinking the UK's local press by a fifth. The market shares of the largest local publishers have however remained largely unchanged, with these companies cutting costs by consolidating distinct daily and weekly print titles into regional 'hubs' or rebranded online-only services. The result has been a growth in the scale of news 'deserts' around the UK, with many areas seeing a substantial loss in news access and diversity at the local level. In 2019 more than half of the UK's Local Authority Districts were served by only one publisher, representing a 10% increase in the number of local newspaper monopolies since 2017.

In addition, the digital media space is dominated by unregulated tech companies and social media platforms with revenues far beyond that of any UK media organisation, particularly Amazon (£297bn), Apple (£226bn) and Facebook (£66bn). These companies exercise a considerable gatekeeping power over how UK audiences discover, access and consume media content. While the UK is home to a number of independent news websites such as openDemocracy, The Canary, Byline and Novara Media, the traffic to these new journalistic enterprises is miniscule compared to the websites of legacy national media like MailOnline and the Guardian.

The consistent growth of SVOD use in UK households is also bringing US-based companies with large turnovers into direct competition with UK broadcasters. The BBC is still a powerful presence in broadcasting and online, but a decade of funding freezes has kept its budget far below that of its immediate domestic and international competitors. In addition, two rival news channels—GB News and News UK TV (from the owners of the Sun, The Times and Times Radio)—are due to launch soon. The rolling announcements of editorial appointments at these channels suggest that programming will be aimed at attempting to undermine the BBC's public service broadcasting model and expanding the space for conservative news voices.

Our findings in this report detail the dangerous extent of media concentration in the UK across the newspaper industry, online news, social media and broadcasting. This kind of concentration creates conditions in which wealthy individuals and organisations can amass huge political and economic power and distort the media landscape to suit their interests and personal views. Urgent reform is needed to remedy these high levels of concentration, to protect against further losses of media plurality and diversity, and to effectively regulate the increasingly powerful role of social media and tech companies in the UK media landscape.

NATIONAL NEWSPAPERS

Market share by print circulation (ABC)

Since 2018 the long-term declining circulation in the UK's newspaper industry has continued and the Coronavirus pandemic has contributed to a further significant fall in daily newspapers sales. Between March and April 2020, the first month of the national lockdown, average circulation of daily national newspapers dropped by nearly a third (29.95%).^[1] Circulation of the Metro fell by over 900,000 copies (69.93% of the paper's March sales), while the Financial Times and the i also saw a substantial drop in print copies sold (39.36% and 37.60% respectively). Although the Guardian and the Daily Mail were the least badly affected, the sudden drop in circulation was spread equally across tabloid and broadsheet titles. Sales recovered over the summer, however average combined circulation in 2020 was 23.59% lower than in 2019, and down by 27.72% since our last report. As Table 1 shows, The Sun and the Daily Mail are still the dominant titles in the national newspaper market, each accounting for over a fifth of the share of daily circulation.

Table 1. Average daily print circulation, national newspapers (2020)

Publication	Average Circulation (2020)	YoY % Change (vs 2019)	Share of Circulation (2020)	Average Daily Circ. (Nov 2018)	% Change from Nov 2018
The Sun	1,102,263	-14.75%	23.15%	1,403,779	-21.48%
Daily Mail	1,028,879	-12.32%	21.61%	1,222,611	-15.85%
Metro	754,922	-46.91%	15.85%	1,451,399	-47.99%
Daily Mirror	397,379	-17.67%	8.35%	519,224	-23.47%
The Times	323,817	-16.59%	6.80%	415,577	-22.08%
Daily Telegraph	264,520	-19.24%	5.56%	322,798	-18.05%
Daily Express	258,665	-15.89%	5.43%	359,110	-27.97%
Daily Star	243,474	-20.90%	5.11%	340,816	-28.56%
i	163,417	-28.14%	3.43%	238,771	-31.56%
Guardian	115,626	-12.72%	2.43%	136,834	-15.50%
Financial Times	108,809	-35.76%	2.29%	177,196	-38.59%
Total	4,761,770	-23.59%	100.00%	6,588,115	-27.72%

(Source: ABC/MRC)

^[1] Since the start of 2020 the publishers of The Sun, The Times and The Telegraph have opted out of submitting circulation figures to ABC. The average circulation figures for 2020 used here are thus estimated based on industry trends and company reporting. The full methodology for these projections is outlined in Appendix 1 and this report's accompanying data sheets.

Sales of national Sunday newspapers were less severely hit by lockdown, but still experienced a profound declining trend year-on-year. Average combined circulation fell by over 500,000 since 2019, and has seen a drop of nearly 20% since November 2018. Much like the national daily market, Sunday circulation is dominated by The Sun on Sunday and the Mail on Sunday, which together accounted for half of all Sunday papers sold in 2020.

Table 2. Average weekly print circulation, national Sunday newspapers (2020)

Publication	Average Circulation (2020)	YoY % Change (vs 2019)	Share of Circulation (2020)	Av. Circulation (Nov 2018)	% Change from Nov 2018
Sun on Sunday	917,018	-15.68%	25.37%	1,187,848	-22.80%
Mail on Sunday	894,207	-9.31%	24.74%	1,028,736	-13.08%
Sunday Times	600,811	-11.57%	16.62%	727,079	-17.37%
Sunday Mirror	327,251	-17.51%	9.05%	434,436	-24.67%
Sunday Express	229,148	-13.98%	6.34%	283,751	-19.24%
Sunday Telegraph	223,763	-13.19%	6.19%	280,404	-20.20%
Daily Star Sunday	148,933	-19.07%	4.12%	165,868	-10.21%
Observer	146,004	-8.93%	4.04%	205,702	-29.02%
Sunday People	127,728	-15.36%	3.53%	168,690	-24.28%
Total	3,614,863	-13.84%	100.00%	4,482,514	-19.36%

(Source: ABC/MRC)

Despite the industry-wide drop in circulation, the share of combined weekly circulation amongst the major publishing companies has become even more concentrated.[2] At the time of our last report, just three publishers—DMG Media (publishers of the Daily Mail, Sunday Mail, Metro and i); News UK (The Sun, The Times and the Sunday equivalents); Reach Plc (the Mirror, Express and Star titles, and the Sunday People)—accounted for over four-fifths of print sales. In 2020, the share of the national newspaper market controlled by these same three companies had risen to almost 90%.

Table 3. Combined weekly circulation by publisher (2020)

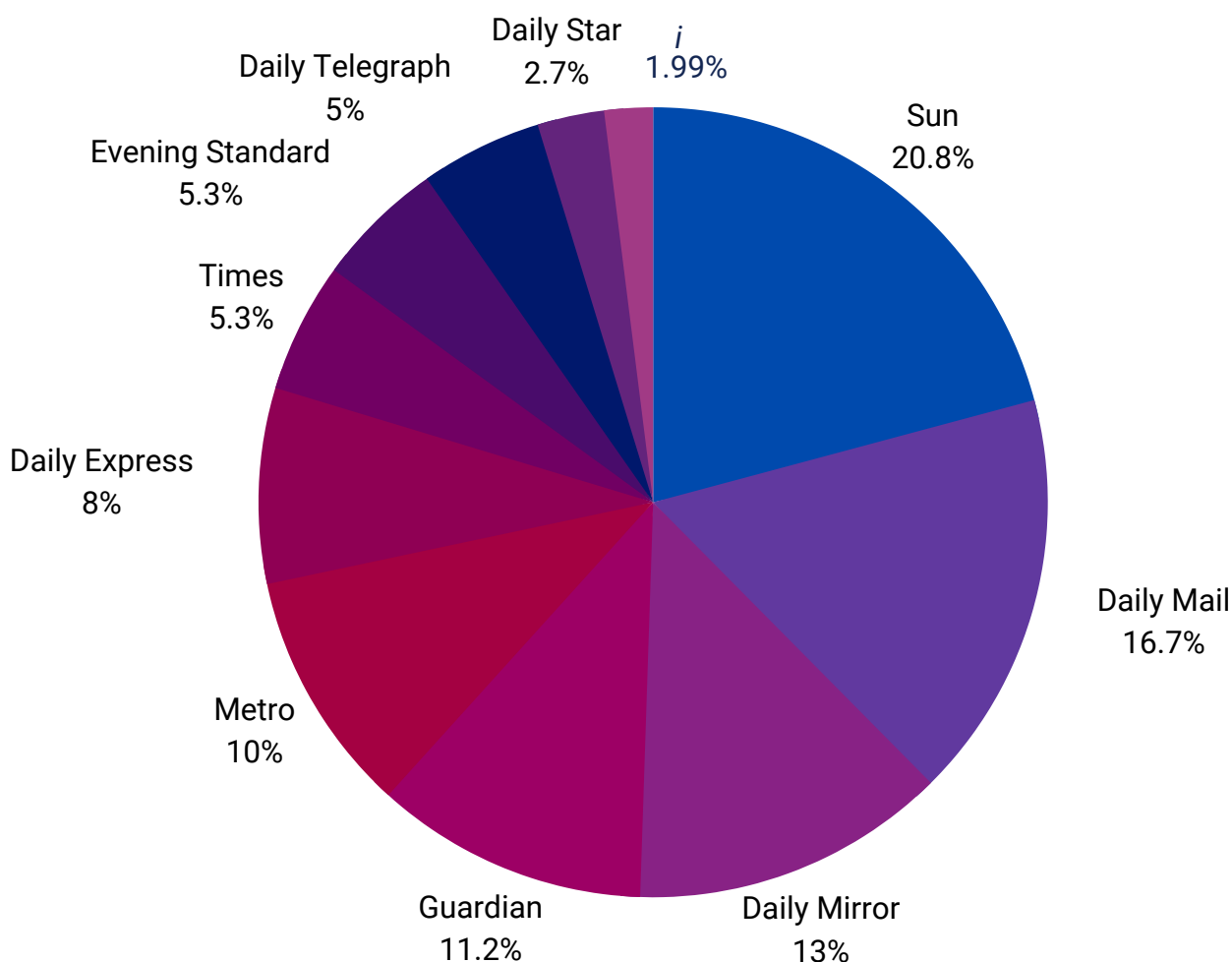
Publisher	Weekly Circulation	Share of Circulation	Cumulative Share
DMG Media	11,986,008	38.26%	38.26%
News UK Newspapers	10,074,305	32.16%	70.41%
Reach	6,083,609	19.42%	89.83%
Telegraph Media Group	1,689,993	5.39%	95.23%
Guardian News & Media	842,691	2.69%	97.92%
The Financial Times	652,851	2.08%	100.00%
Total	31,329,457	100.00%	n/a

(Source: ABC/MRC)

[2] Calculated by combining daily circulation with Sunday circulation, where applicable. For example, the Sun's daily circulation is multiplied by six (Monday – Saturday) plus Sun on Sunday circulation. This method does not account for fluctuations in daily newspaper circulation (i.e. on Saturdays) and is therefore an approximation

Combined print and online: total brand reach (PAMCo) data

While print circulation has persistently declined, the combined print and digital reach of the UK's publishers has grown substantially in the last few years. Table 4 shows the combined Total Brand Reach (TBR) of the major print newsbrands, using PAMCo print data for March 2020 and Comscore digital data from September 2020.[3] The aggregate daily brand reach of the national print plus digital market has grown by nearly two-fifths since December 2018, driven by large increases in the online reach of the Express, the Mirror and the Sun. The Sun and the Daily Mail continue to reach the largest audiences each day: 10.2 million for the Sun and 8.2 million for the Mail (although the Sun figures include 18 different websites, compared to the Daily Mail's one). As with print circulation, just three publishing companies account for four-fifths of total brand reach amongst the major print titles: DMG Media, including the Evening Standard (33.98%); News UK (26.16%); and Reach Plc (20.95%).



(Source: PAMCo/Comscore)

Table 4. Total daily brand reach (TBR), newspaper newsbrands (Sept 2020)

Newsbrand	Daily TBR (Sept 2020)	Daily TBR (Dec 2018)	Change since Dec 2018	Market Share	Combined Share
The Sun	10,222,000	7,162,000	42.73%	20.83%	20.83%
Daily Mail	8,215,000	6,461,000	27.15%	16.74%	37.57%
Daily Mirror	6,356,000	3,539,000	79.60%	12.95%	50.52%
Guardian	5,487,000	4,049,000	35.51%	11.18%	61.70%
Metro	4,892,000	3,597,000	36.00%	9.97%	71.67%
Daily Express	3,928,000	1,654,000	137.48%	8.00%	79.67%
The Times	2,616,000	1,642,000	59.32%	5.33%	85.00%
Evening Standard	2,588,000	2,412,000	7.30%	5.27%	90.27%
Daily Telegraph	2,451,000	3,348,000	-26.79%	4.99%	95.27%
Daily Star	1,343,000	1,006,000	33.50%	2.74%	98.01%
<i>i</i>	979,000	593,000	65.09%	1.99%	100.00%
Aggregated Total	49,077,000	35,463,000	38.39%	100.00%	n/a

(Source: PAMCo/Comscore)

Market share by revenue

Table 5 shows the annual turnover of the UK's national newspaper publishers, using figures from the most recently available company reports. The reporting dates used here are intended to give the closest comparable revenue figures for each publisher, as at time of writing only DMG Media and Reach Plc have published finances for a significant period of 2020. News Corp UK & Ireland [4] and DMG Media (which purchased the *i* from JPI Media in 2019) account for over half of all revenue, while Reach Plc also controls a 20% share of market turnover (having combined the former Trinity Mirror and Express businesses in 2018).

Table 5. Market share by revenue, national newspaper publishers

Company	Turnover	Market Share	Cumulative Share	Reporting date
News Corp UK & Ireland Ltd	£750,222,000	26.50%	26.50%	June 2019
DMG Media Ltd	£672,000,000	23.74%	50.24%	Sept 2019
Reach Plc	£591,300,000	20.89%	71.13%	Dec 2019
The Financial Times Ltd	£344,967,000	12.19%	83.32%	Dec 2019
Telegraph Media Group Ltd	£265,791,000	9.39%	92.71%	Dec 2019
Guardian News & Media Ltd	£206,348,000	7.29%	100.00%	Mar 2020
Total	£2,830,628,000	100.00%	n/a	

(Source: Company accounts)

[4] News Corp revenue calculated from combining the annual accounts of News Group Newspapers Ltd (The Sun and Sun on Sunday) and Times Newspapers Ltd (The Times and Sunday Times).

LOCAL NEWSPAPERS

Our 2019 report showed the extensive concentration in the UK’s local newspaper industry caused by a series of mergers and acquisitions by Trinity Regionals (now Reach Plc), Newsquest and Iliffe.[5] Since then, two of the six largest publishers have been bought out: Archant by private equity company Rcapital Partners in August 2020; and JPI Media by National World Plc in December 2020. Over the same period, the local press has continued to decline and the Coronavirus pandemic has accelerated the long-term trend of closures across the industry. Reports by Press Gazette and Hold The Front Page reveal that at least 60 local newspapers have been closed since January 2019, which combined with Press Gazette research [6] from August 2020 suggests that as many as 295 titles have ceased publication since 2005 –approximately 20% of the total UK local press.

JPI Media (27), Tindle (15) and Reach (9) were responsible for most of the closures since January 2019, and it is possible that many more local newspapers that suspended printing during lockdown will cease publication indefinitely. As of February 2021, concentration in the UK’s local newspaper industry remains substantial. 83% of all local titles are controlled by just six publishers, and the three largest publishers—Newsquest, Reach and JPI Media—each account for a fifth of the market, more than the share of the smallest 50 local publishing companies combined. Those publishers whose annual revenue figures are available are listed in Table 7, which shows the concentration of turnover in the hands of a few publishers who control the majority of titles. [7]

Table 6. Local newspaper titles by publisher (February 2021)

Publisher	Titles	Share	Cumulative share
Gannett UK (Newsquest)	236	23.2%	23.2%
Reach	211	20.7%	43.9%
JPI Media	183	18.0%	61.9%
Tindle Newspapers	79	7.8%	69.6%
Archant	72	7.1%	76.7%
Iliffe Media	71	7.0%	83.7%
Remaining 50 publishers	166	16.3%	100.0%
	1018	100%	n/a

(Source: MRC)

[5] <https://www.mediareform.org.uk/wp-content/uploads/2019/03/FINALonline2.pdf> (pgs. 8-9)

[6] <https://www.pressgazette.co.uk/uk-local-newspaper-closures-at-least-265-local-newspaper-titles-gone-since-2005-but-pace-of-decline-has-slowed/>

[7] Due to how company accounts are reported, it is increasingly difficult to separate the revenues of companies such as Newsquest and Reach between their local/regional businesses and other publishing businesses like national newspapers or printing services. The figures used here are based on available revenues of each company’s identifiable local/regional subsidiary companies. Further details can be found in the accompanying data sheets.

Table 7. Turnover of local newspaper publishers

Publisher	No. of Titles	Revenue	Reporting date
Reach Plc	211	£282,009,000	Dec 2019
DC Thomson & Company Ltd	5	£198,500,000	Mar 2020
Newsquest Media Group	236	£193,241,000	Dec 2019
JPI Media	183	£175,340,000	Jan 2020
Archant	72	£87,275,000	Dec 2018
Iliffe Media	71	£40,279,856	Mar 2019
Midland News Association	17	£25,919,000	Dec 2019
Independent News and Media Ltd	3	£24,714,000	Dec 2019
Tindle Newspapers Ltd	79	£23,543,310	Mar 2019
Acredula Group	2	£10,417,682	Dec 2019
Baylis Media Ltd	5	£2,058,923	Mar 2019
One Media and Creative UK Ltd	2	£1,239,760	Mar 2019

(Source: Company accounts)

Declining local newspaper coverage

Research by Plum Consulting has highlighted the deepening crisis in the geographic coverage provided by local newspapers in the UK. In 2019 65% of the 406 Local Authority Districts (LADs) in the UK were not covered by a single daily local.[8] More than half of local areas in the UK (54.9%) were served by only one publisher, representing an increase of almost 10% in the number of local newspaper monopolies since 2017.[9]

The prevalence of news 'deserts' in the UK is accompanied by continuing job cuts, redundancies and consolidated newsrooms across the local and regional press industry. Currently available data makes it increasingly difficult to account for the number of print newspapers which have moved to an online-only format or been merged into wider regional news 'hubs'. However, reporting by Press Gazette indicates that at least 785 jobs at local newspapers have been cut since January 2019, while between 2,000 and 5,000 jobs are at risk due to cuts and print suspensions brought about by the Coronavirus pandemic.[10]

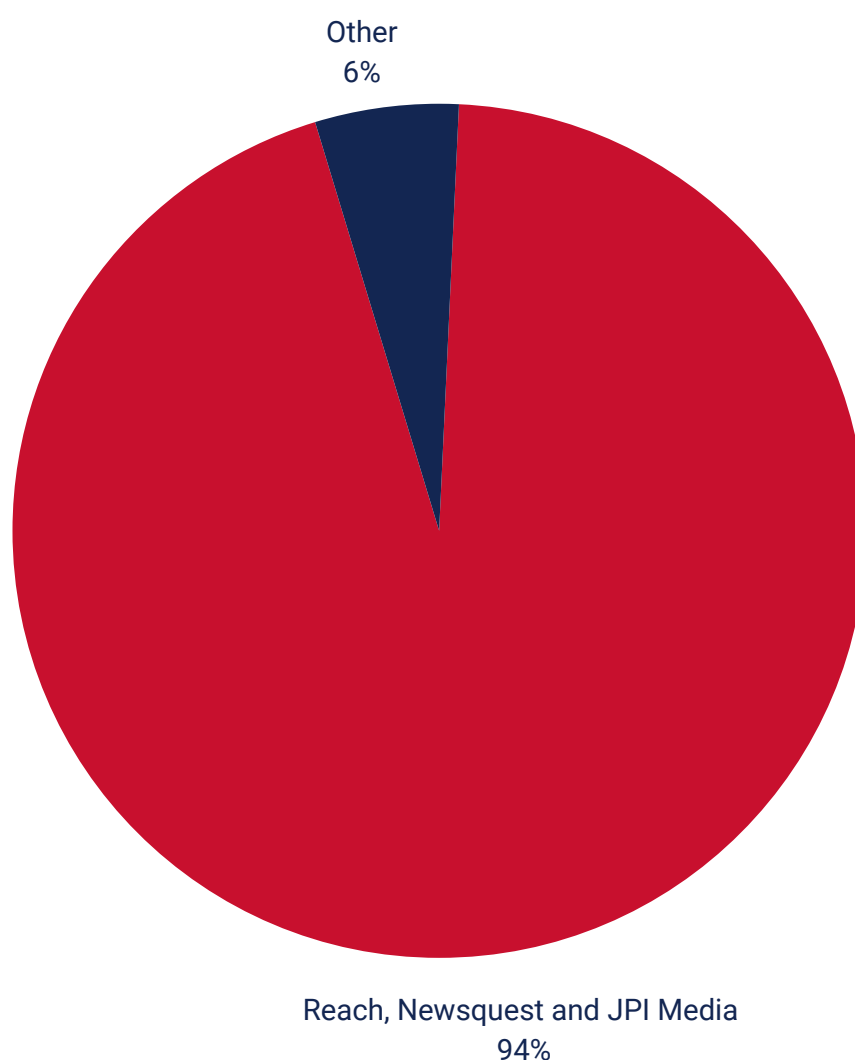
[8] <https://plumconsulting.co.uk/research-into-recent-press-sector-dynamics/#> (pgs. 46-47) The 406 figure for total UK LADs includes 26 LADs in Northern Ireland, for which no corresponding JICREG data is available.

[9] <https://www.mediareform.org.uk/wp-content/uploads/2017/12/mapping-changes-in-local-news-2015-2017-interactive-research-report-march-2017.pdf> (pg. 7)

[10] Estimates by Press Gazette <https://www.pressgazette.co.uk/more-than-2000-newspaper-jobs-hit-as-hundreds-of-publications-across-uk-face-covid-19-cuts/> and Enders Analysis (£) <https://www.thetimes.co.uk/article/covid-chaos-spells-bad-news-for-the-media-p9xdgz73b>

New ventures are attempting to offset the on-going decline in the UK local and regional press: the hyper-local news network Nub News has expanded to cover 62 towns across the UK,[11] and since January 2019 at least 30 new newspapers have been launched. Most of these are independent or community-run, however twelve are online-only formats and seven are replacements for recently-closed newspapers in the same area. In addition, more than 9 in 10 of the 149 Local Democracy Reporters funded by the BBC Local News Partnership scheme are contracted to the three dominant local newspaper publishing companies—Reach, Newsquest and JPI Media.[12]

News in their hands: More than 9 in 10 of Local Democracy Reporters are contracted to the three dominant local publishing companies



[11] <https://www.holdthefrontpage.co.uk/2021/news/media-minister-praises-continued-expansion-of-hyperlocal-news-network-hold-hancock-quote-mentions-fresh-recruitment-bid/>

[12] <http://downloads.bbc.co.uk/aboutthebbc/reports/reports/lnp-review-2020.pdf> (pg. 11)

NEW DIGITAL JOURNALISM

Digital and online-only journalistic enterprises remain a major source of news provision and consumption in the UK, with a recent Ofcom report finding that 65% of all UK adults used the internet to access news content in 2020. While there is no dedicated body for auditing the online reach of individual websites, as with ABC/PAMCo for print newspapers and BARB/RAJAR for broadcasters, several metrics are available for understanding the share of ownership in the UK's online news marketplace.

Table 8. Monthly visits, selected digital news sites (Jan 2021)

Digital National/Partisan		Total visits	%UK	UK Traffic
Guido Fawkes	order-order.com	2,420,000	93.19%	2,255,198
London Economic	thelondoneconomic.com	1,650,000	71.66%	1,182,390
UnHerd	unherd.com	1,550,000	54.58%	845,990
The Canary	thecanary.co	786,710	82.02%	645,260
Byline	bylinetimes.com	798,830	67.62%	540,169
Conservative Home	conservativehome.com	538,150	81.90%	440,745
Skwawkbox	skwawkbox.org	437,420	91.33%	399,496
Novara Media	novaramedia.com	437,740	75.67%	331,238
OpenDemocracy	opendemocracy.net	1,110,000	27.62%	306,582
LabourList	labourlist.org	242,650	92.32%	224,014
Evolve Politics	evolvepolitics.com	110,380	79.89%	88,183
Digital International				
Buzzfeed	buzzfeed.com	139,010,000	5.64%	7,840,164
Huffington Post [13]	huffingtonpost.co.uk	5,730,000	77.12%	4,418,976
Vice	vice.com	36,590,000	6.84%	2,502,756
Breitbart News Network	breitbart.com	65,970,000	2.36%	1,556,892
The Daily Beast	thedailybeast.com	54,040,000	1.63%	880,852
Digital Legacy/Print				
MailOnline	dailymail.co.uk	372,640,000	39.96%	148,906,944
Guardian	theguardian.com	362,820,000	40.40%	146,579,280
The Express	express.co.uk	147,900,000	55.82%	82,557,780
The Sun	thesun.co.uk	121,560,000	54.95%	66,797,220
Daily Mirror	mirror.co.uk	95,010,000	59.34%	56,378,934
Independent	independent.co.uk	121,670,000	40.17%	48,874,839
The Telegraph	telegraph.co.uk	63,680,000	66.31%	42,226,208
The Times	thetimes.co.uk	37,490,000	65.04%	24,383,496
Spectator	spectator.co.uk	4,390,000	65.67%	2,882,913
New Statesman	newstatesman.com	2,080,000	40.44%	841,152

(Source: SimilarWeb)

[13] On 12 March 2021 BuzzFeed announced plans to close down its Huffington Post digital news operation in the UK, highlighting the market volatility and funding challenges that face even some of the larger online news outlets.
<https://www.theguardian.com/media/2021/mar/12/huffpost-uk-staff-face-redundancy-as-news-operation-closes-down>

Table 8 shows the average monthly visit data (combined desktop and mobile traffic, with proportion of UK visits) for three groups of digital news outlets in online UK journalism:

1. Selected digital-only partisan websites focussed exclusively or primarily on UK politics and current affairs news, covering a range of political orientations.
2. Selected US-based news and current affairs sites providing dedicated or prominent UK news coverage.
3. UK legacy news sites including national and regional newspapers, as well as specialist current affairs magazines.

Although smaller, newer digital journalism sites attract substantial audiences, their monthly traffic clearly pales in comparison to UK legacy news outlets and larger international digital native news sites. Legacy media sites (those in Group 3) have also seen their digital traffic grow extensively since our last report: UK traffic to the Daily Mail and Guardian has increased by almost half since January 2019, while The Sun’s UK traffic has nearly doubled in that same time.[14]

Comscore data for the top 10 news websites in April 2020 also demonstrates the extensive reach that legacy media companies hold with online audiences.[15] As with monthly website traffic, the dominant legacy print websites have seen their audience reach grow by large amounts (and leapfrog the BBC’s reach) since April 2018: both the Daily Mail and Guardian websites have grown their audience reach by two-fifths, while The Sun’s reach has increased by 25% to become the furthest-reaching online news site in the UK.

Table 9. Reach of top 10 news website (April 2020)

News site	Reach	Avg. time spent per visitor	Adults (000s) [16]
The Sun Online	86%	59s	37,339
Daily Mail	78%	1m 22s	33,865
The Guardian	76%	57s	32,997
Express	70%	27s	30,392
Independent	70%	18s	30,392
BBC News	69%	2m 43s	29,958
Mirror Online	68%	39s	29,524
Sky News	65%	1m 10s	28,221
Telegraph	59%	25s	25,616
Daily Star	25%	16s	10,854

(Source: Comscore MMX Multi-Platform Data)

[14] <https://www.mediareform.org.uk/wp-content/uploads/2019/03/FINALonline2.pdf> (pg. 12)

[15] https://www.ofcom.org.uk/_data/assets/pdf_file/0027/196407/online-nation-2020-report.pdf (pg. 21)

[16] Audience figure estimations based on percentage of UK adults that use the internet for news (Ofcom: 65%, or 43.4m by ONS mid-2019 UK population estimates). https://www.ofcom.org.uk/_data/assets/pdf_file/0013/201316/news-consumption-2020-report.pdf (pg. 12)

Table 10 compares the available revenues of selected UK digital-native and partisan news websites with larger digital news sites originating in the US (Groups 1 and 2). The majority of these smaller companies qualify for financial reporting exemptions, due to their low turnover and small number of employees. The financial figures for OpenDemocracy, which receives the bulk of its funding through philanthropy, provide an indicative (if probably larger than average) figure for these news websites. The clear disparity in revenue highlights the significant barriers to entry for new, alternative sources of journalism trying to establish an audience in the current online market.

Table 10. Revenue of selected digital-native UK news outlets (2019)

Publisher	Company	Number	Revenue
London Economic	Greencastle Capital Ltd.	12434223	Not filed
UnHerd	UnHerd Ltd.	10678659	Exempt
The Canary	Canary Media Ltd.	9788095	Exempt
Byline	Byline Media Holdings Ltd.	10143080	Exempt
Conservative Home	Conservative Home Ltd	7053162	Exempt
Novara Media	Thousand Hands Ltd.	11245029	Exempt
LabourList	LabourList Ltd.	6996133	Exempt
Evolve Politics	Evolve Media Ltd.	10341172	Exempt
OpenDemocracy	OpenDemocracy Ltd.	3855274	£1,255,914
Vice	Vice UK Ltd.	4531415	£17,296,607
Buzzfeed	Buzzfeed UK Ltd.	8318051	£22,353,414

(Source: Company accounts)

PLATFORMS AND INTERMEDIARIES

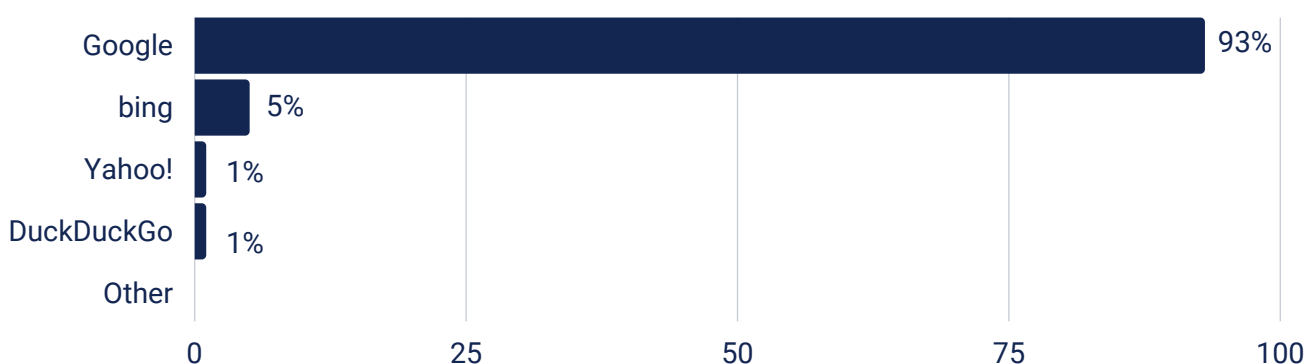
Ofcom's 2020 'Media Nation' report highlights the extensive role of a small number of digital platforms and intermediary companies in how UK audiences access and consume media content online. In September 2019 UK adults spent an average of 3 hours and 11 minutes online every day, with two-fifths of this time spent on sites owned by Google and Facebook. In April 2020, at the height of the national lockdown, average time online had risen to 4 hours and 2 minutes, with 36% of this time spent on social media and online news websites.[17] The major providers of online media, all of which except TikTok originate in the United States, generate annual revenues that dwarf every UK media organisation including the BBC. Figure 1 also shows Google's domination of the share of search engine use in the UK, where it accounts for more than nine-tenths of search queries across all platforms.

Table 11. Platforms and intermediaries – revenue and media functions

Company	HQ	Revenue (£m) [18]	Selection media function(s)
Amazon Inc	USA	£297,694	Hardware; TVOD; Music streaming
Apple Inc	USA	£226,807	SVOD; TVOD
Alphabet Plc	USA	£140,747	Video and SVOD (YouTube); Search (Google)
Facebook	USA	£66,288	Social (Facebook; Whatsapp; Instagram)
Disney	USA	£46,840	SVOD; broadcasting (ABC); film
ByteDance	China	£20,808	Social (TikTok)
Netflix	USA	£19,274	SVOD
Twitter	USA	£2,865	Social
SnapChat	USA	£1,932	Social

(Source: Company accounts)

Figure 1. UK share of search (Feb 2021)



(Source: Statcounter)

[17] https://www.ofcom.org.uk/__data/assets/pdf_file/0027/196407/online-nation-2020-report.pdf (pgs. 38-39)

[18] Revenues for US-based companies converted using a 3 year average (2018-2020) rate of 0.7711 USD/GBP.

ByteDance revenue estimated by Reuters <https://www.reuters.com/article/china-bytedance-revenue-idUSKBN27R191>

[19] Other includes Ecosia (0.34%), Yandex (0.07%), MSN (0.02%) and Norton Safe Search (0.02%).

Social media and news consumption

As of January 2021 Facebook remains the dominant global social media provider with 2.74 billion active users, together with 2 billion users for its messaging app WhatsApp and 1.2 billion users on Instagram. YouTube, owned by the Google umbrella company Alpha Inc, has 2.2 billion global active users while TikTok (689 million), Snapchat (498 million) and Twitter (353 million) also hold large numbers of worldwide users.[20]

These same platforms are also the dominant social media providers in the UK, each attracting larger audiences than most legacy media companies across print and broadcasting. According to the most recently available figures, the number of UK users for selected social media sites are as follows:



50.36 Million

[21]



30.36 Million

[22]



16.4 Million

[23]



17 Million

[24]

Research by Ofcom and the Reuters Institute for the Study of Journalism [25] demonstrates that social media is increasingly central to how UK audiences find and consume news content. In 2020, nearly half of all UK adults used social media as one of their main news sources, and of those 42% said they get most of their news from social media posts rather than news organisations' websites or apps (29%). [26] Table 12 replicates data in Ofcom's 2020 'News Consumption in the UK' report, which shows that Facebook and its subsidiary apps Instagram and WhatsApp represent the dominant share of the most commonly used platforms for online news.

[20] <https://www.statista.com/statistics/272014/global-social-networks-ranked-by-number-of-users/> As a further indication of the scale of social media use globally, platforms like WeChat (1.2bn users), QQ (617m) and Douyin (600m) in China also enjoy large audiences far beyond the comparative figures for domestic legacy media.

[21] <https://www.statista.com/statistics/1012080/uk-monthly-numbers-facebook-users/>

[22] <https://www.statista.com/statistics/1018494/instagram-users-united-kingdom/>

[23] <https://www.statista.com/statistics/242606/number-of-active-twitter-users-in-selected-countries/>

[24] <https://www.bloomberg.com/news/articles/2020-09-30/tiktok-users-in-uk-germany-france-italy-norway-ages-screentime-open-rates>

[25] <https://www.digitalnewsreport.org/survey/2020/united-kingdom-2020/>

[26] https://www.ofcom.org.uk/__data/assets/pdf_file/0013/201316/news-consumption-2020-report.pdf (pgs. 39-43)

Table 12. Social media used for news nowadays (2020)

Platform	% used for news	Total news users (000s) [27]	Parent company
Facebook	76%	22,844	Facebook Inc.
Twitter	37%	11,121	Twitter Inc.
Instagram	31%	9,318	Facebook Inc.
WhatsApp	30%	9,017	Facebook Inc.
Snapchat	17%	5,109	Snap Inc.
LinkedIn	10%	3,005	Microsoft
Reddit	6%	1,803	Advance Publications
TikTok	3%	901	ByteDance
Tumblr	2%	601	Automatic

(Source: Ofcom)

On the largest social media platforms, the most followed news sources are predominantly drawn from legacy media organisations. As a proportion of the news accessed by UK social media users, news organisations account for 48% of sources consumed on Facebook, 58% on Twitter, 51% on Instagram and 65% on Snapchat.[28] The BBC is the most followed news organisation (by a wide margin on Facebook, Twitter and Instagram), and a large number of UK social media users also follow ITV and Sky News. BuzzFeed and LAD Bible feature prominently on all lists, while national UK newspapers make up the majority of other sources with sizeable social media followings. Notably only 8% of those who use Facebook for news say they access ‘any local newspaper’ as a news source.

Table 13. News organisations followed on social media [29]

Facebook		Twitter		Instagram		Snapchat	
BBC	52%	BBC	50%	BBC	39%	BBC	33%
ITV	24%	Sky News	25%	Sky News	20%	BuzzFeed	28%
Sky News	22%	ITV	17%	ITV	18%	Daily Mail	21%
LADbible	20%	Guardian	12%	YouTube	18%	LADbible	20%
BuzzFeed	20%	Channel 4	10%	BuzzFeed	16%	Sky News	17%
Daily Mail	18%	LADbible	9%	LADbible	16%	ITV	16%
YouTube	15%	Daily Mail	9%	Daily Mail	11%	The Sun	14%
The Sun	14%	CNN	9%	Channel 4	11%	YouTube	14%
Channel 4	13%	BuzzFeed	8%	CNN	10%	Channel 4	12%
Metro	13%	YouTube	8%	The Sun	9%	Vice	10%
Guardian	12%	Independent	7%				
HuffPost	10%	Telegraph	7%				
Daily Mirror	9%						
Local newspaper	8%						

(Source: Ofcom)

[27] Estimates for total news users are based on the proportion of the UK population that consumes news via any social media (45% or 30.058 million, using ONS mid-2019 figures).

[28] https://www.ofcom.org.uk/_data/assets/pdf_file/0013/201316/news-consumption-2020-report.pdf (pg. 45)

[29] https://www.ofcom.org.uk/_data/assets/pdf_file/0013/201316/news-consumption-2020-report.pdf (pg 50.) Additional follower data taken from raw survey data used in Ofcom’s News Consumption report.

TELEVISION

Ownership and revenue: UK terrestrial television

Table 14 provides an overview of the ownership and revenue of three groups of companies with primary involvement in the UK television, subscription broadcasting and SVOD markets. The first group includes the main Public Service Broadcasters (PSBs) as well as Sky (the UK's largest subscription platform with an established content production arm as well as consumer broadband and telecommunications) and BT (a telecommunications company that also provides consumer broadband and subscription-based broadcasting). The second group highlights telecommunications companies with no content provision capacity, and the third group lists the main providers of Video on Demand services.

As was the case at the time of our last report, there is an enormous gulf in revenue between content providers and telecommunications companies on the one hand and digital on-demand subscription services on the other. Revenues for companies providing SVOD and TVOD services reach into the hundreds of billions, and Amazon's turnover has increased by nearly half since 2018. By contrast, revenues for UK-based broadcasters range from £985 million for Channel 4 to £22.8 billion for BT, and these figures have changed very little in two years. The BBC—the UK's principle public service broadcaster—has one of the smallest revenues of these major broadcasting services.

Table 14. UK television companies – content production, provision and on-demand services

Platform	Parent Company	Location of Owner	Revenue
Content providers (PSB & Subscription)			
BT	BT Group	UK	£22.82 bn
Sky (inc. Now TV)	Comcast	USA	£14.7 bn
Channel 5	Viacom International	USA	£9.82 bn
BBC	BBC Group	UK	£4.94 bn
ITV	ITC Plc	UK	£3.3 bn
Channel 4	Channel Four Television	UK	£0.98 bn
Telecommunications			
Virgin Media	Liberty Global Plc	USA	£5.16 bn
TalkTalk	TalkTalk Group	UK	£1.55 bn
Video on Demand (SVOD and TVOD)			
Prime Video	Amazon Inc	USA	£295.34 bn
iTunes (TVOD)	Apple Inc	USA	£225.01 bn
YouTube (Premium)	Alphabet Inc	USA	£139.63 bn
Disney+	Disney	USA	£46.46 bn
Netflix	Netflix Inc	USA	£19.12 bn

(Source: Company accounts)

Figure 2 compares the network viewing share of terrestrial television broadcasters in the UK, using BARB data for February 2021. The BBC leads with 30.7%, followed by ITV with 22.7%. Although Sky has almost three times the revenue of the BBC, it attracts less than one-third of the BBC's terrestrial television viewing share in the UK.

Figure 2. TV network viewing share - % all individuals (Feb 2021) [30]

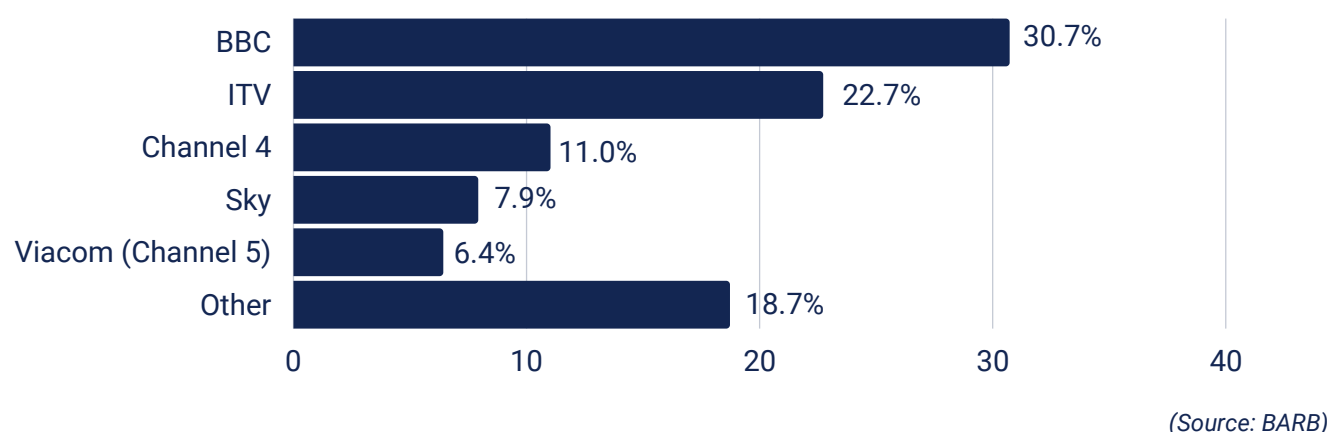


Table 15 shows the number of UK households subscribed to each of the main Subscription Video on Demand (SVOD) providers. In 2020 there were almost 30 million subscriptions to these selected SVODs, nearly twice as many than in 2018 and more than double the number of subscriptions to 'traditional' pay-TV services like Sky and Virgin Media.[31] More than eight out of ten UK households subscribed to at least one SVOD use Netflix, and 2.2 million households are subscribed to Disney+ since its launch in March 2020.

Table 11. Platforms and intermediaries – revenue and media functions

Platform	Households (m)	Households %
Netflix	14.2	87.1%
Amazon Prime Video	9.1	55.8%
Disney+	2.2	13.5%
Now TV	1.9	11.7%
Apple TV+	0.7	4.0%
BritBox	0.1	0.8%
HayU	0.1	0.7%
Total (at least one)	16.3	
Combined subscriptions	29.9	

(Source: BARB)

[30] Others includes Discovery, UKTV, BT Sport etc.

[31] <https://www.barb.co.uk/trendspotting/tracker-uk-households-by-tv-platform/>

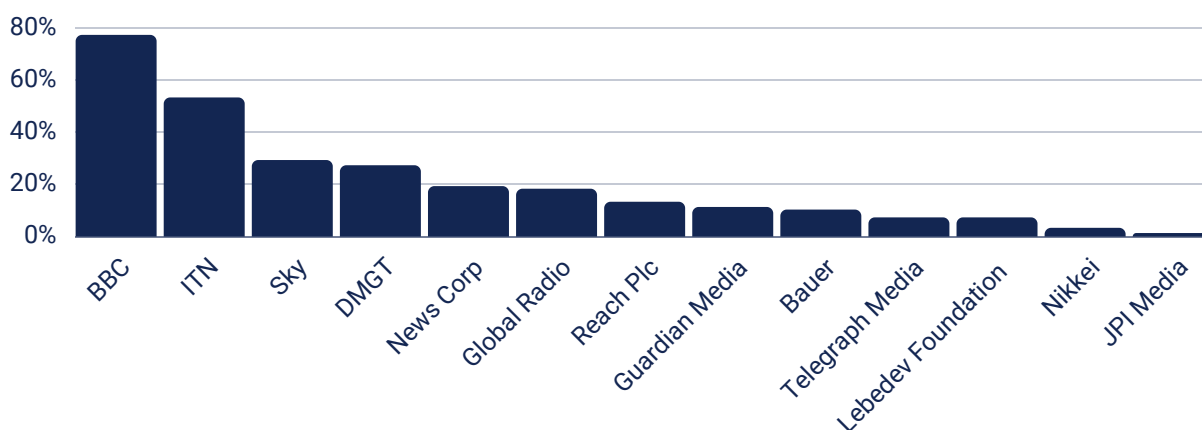
Estimating the impact of new TV news channels

Although SVOD providers and other digital on-demand services are a prominent part of the UK's broadcasting landscape, live TV remains the most popular means that UK audiences use to access broadcast content. Of the 6 hours and 25 minutes people spend viewing audiovisual content on average every day, Ofcom research estimates nearly 3 hours of people's viewing is spent watching live TV. The combined share of live TV, recorded playback and BVOD services from traditional broadcasters makes up 59% of time spent viewing audiovisual content.[32]

The launch in 2021 of two new broadcast news channels is thus an important development. News UK TV, owned by Rupert Murdoch's News UK, plans to provide a free-to-air news channel producing around five hours of news and current affairs programming every night. Reports indicate that the style of news content is set to imitate Murdoch's Fox News in the US, and will focus heavily on opinionated presenter-led and debating formats. Although the scale of funding for News UK TV is not yet clear, its US-based parent company News Corp had revenue of £6.9 billion in 2020—a substantial amount for investing in a dedicated broadcast news service.[33]

The second new TV news channel, GB News, has secured approximately £60 million in funding from a mix of private sources including Dubai-based investment group Legatum. US-based multimedia giant Discovery Inc has contributed £20 million to GB News, and the channel's co-founders have close links with US cable billionaire John Malone, the chair of Virgin Media owners Liberty Global (2019 revenue: £8.8 billion).[34] The channel aims to run a 24-hour TV and online news service, and has announced a number of right-wing journalists and commentators as part of its programme line-up. The channel is chaired by Andrew Neil, the former Sunday Times editor and BBC presenter who is also chair of Press Holdings, the publishers of The Spectator magazine.

Figure 3. Cross-platform whole providers used for news (2020) [35]



[32] https://www.ofcom.org.uk/_data/assets/pdf_file/0010/200503/media-nations-2020-uk-report.pdf (pg. 8)

[33] <https://newscorp.com/wp-content/uploads/2020/10/news-corp-2020-annual-report.pdf> (pg. 90) USD converted to GBP with a 3-year exchange rate average of 0.7711.

[34] <https://www.libertyglobal.com/wp-content/uploads/2020/07/LG-2019-10-K-A-ANNUAL-REPORT.pdf> (pg. 92)

[35] Reproduced from https://www.ofcom.org.uk/_data/assets/pdf_file/0013/201316/news-consumption-2020-report.pdf (pg. 21). Includes TV, newspapers, radio, internet and magazine sources used for news.

Both News UK TV and GB News have been granted broadcasting licences by Ofcom, but their corporate funding links and plans for opinion-heavy news content clearly pose a risk to the diversity of UK news opinion and the concentration of ownership in cross-media news provision. Although the UK’s public service broadcast news providers—BBC and ITN—are by far the largest sources of cross-media news, a handful of corporations also command substantial wholesale audiences. Even after selling Sky News to Comcast in 2018, outlets controlled by News Corp still attract almost a fifth of news audiences and this figure is likely to grow following the launch of News UK TV. Although GB News and its owners currently have a negligible stake in UK cross-media news provision, the launch of both channels threatens the already perilous balance of political opinion in UK media. While both channels will be bound to Ofcom’s rules on impartiality, this does not require broadcasters to provide equal airtime. As long as channels include general coverage of differing views, there is little stopping GB News and News UK TV from airing predominantly right-wing opinion and attempting to steer the news agenda in favour of their proprietors.

RADIO & PODCASTING

Table 16 shows the breakdown of BBC and commercial radio services, across analogue and digital provision at the UK-wide and local levels. Although the BBC provides a number of national radio services and an extensive network of local stations, the number of commercial analogue and digital stations is far larger. Commercial DAB provision has also grown substantially, with 12 more UK-wide services and 102 more local or regional stations since 2018—an increase of 38% and 25% respectively.

Table 16. BBC and commercial radio – UK-wide and local/regional services

Radio provision	BBC	Commercial
UK-wide analogue stations	5	3
Local/regional analogue	46	285
UK-wide DAB stations	11	43
Local/regional DAB	50	466

(Source: Ofcom/www.ukdigitalradio.com)

The BBC provides the majority of UK radio expenditure, however this spend has fallen from £744 million in 2018 to £726 million in 2020. Over the same period, commercial revenue rose from £557 million to £613 million. The BBC’s share of listening also dropped to 49.7% (from 51.7%). According to RAJAR figures, the BBC’s weekly reach among adults (15+) is 35.5 million (61%) compared with 36.2 million (66%) for commercial radio.

Figure 4. BBC vs commercial radio – audience and revenue shares [36]

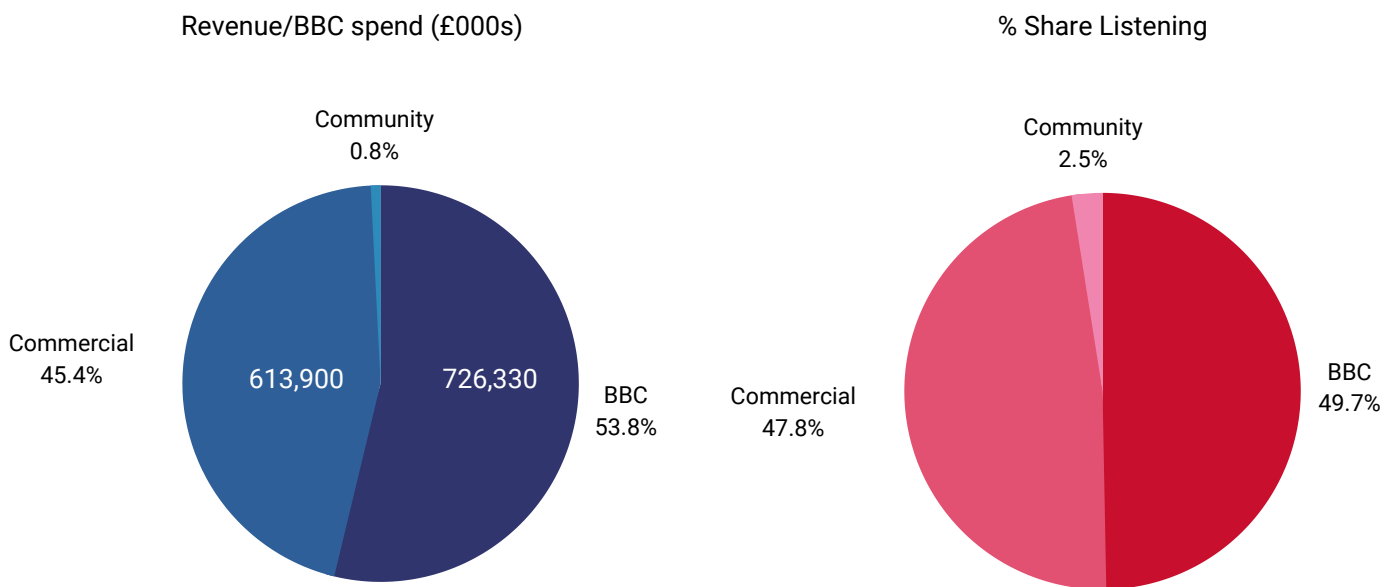


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(Source: Ofcom/www.ukdigitalradio.com)

[36] Share of listening (Adults 15+): RAJAR, period ending March 2020. Due to Coronavirus RAJAR suspended fieldwork in Q1 2020 so more recent figures are not available. Revenue figures taken from <https://www.ofcom.org.uk/research-and-data/multi-sector-research/cmr/cmr-2020/interactive>

UK radio stations – analogue

There are eight national and 331 local stations operating on analogue licences in the UK. The national analogue service has not changed since 2018, with five stations provided by the BBC and three by commercial companies: Absolute Radio (owned by Bauer); Classic FM (Global Radio); and Talksport (Wireless Group). The BBC still operates 46 local analogue services, yet the share of the commercial analogue market has changed markedly since 2018. In early 2019 Bauer acquired ownership of Celador Radio, UKRD, Lincs FM and twelve local stations run by Wireless Group in England and Wales.[37]

Table 17. Local commercial analogue radio licences in the UK (Feb 2021)

Owner	Number of stations	Share of total
Bauer Radio	106	38.0%
Global Radio	83	29.7%
Independent	32	11.5%
Nation Broadcasting	14	5.0%
Communicorp	9	3.2%
KM Media	7	2.5%
Northern Media Group	7	2.5%
DC Thomson	4	1.4%
Media Sound	4	1.4%
Murfin Music	4	1.4%
Adventure Radio	2	0.7%
Jack Media	2	0.7%
Premier Christian Radio Trust	2	0.7%
Tindle	2	0.7%
Wireless Group	1	0.4%
Total	279 [38]	100%

(Source: Ofcom)

Bauer now controls nearly two-fifths of the UK's local commercial analogue radio stations, and together with Global Radio these two companies hold almost 70% of the entire market—an increase in concentration of more than 20% since 2018. These companies have also continued to shut down local radio brands and consolidate their stations' programming under nationwide services. In February 2019 Bauer replaced more than 40 local breakfast broadcasts with three national programmes, and in May 2020 Global announced a similar move for 50 of its regional radio outlets.[39]

[37] Wireless Group retained its national Talksport service as well as seven local stations operated in Northern Ireland and the Republic of Ireland.

[38] Ofcom's 2020 Media Nations figure for the number of local analogue stations (Table 16) includes overlapping licences for the three national analogue commercial services and others, hence the difference in totals.

[39] <https://www.theguardian.com/tv-and-radio/2019/feb/26/scores-of-uk-radio-stations-to-lose-local-programmes>; see also <https://www.theguardian.com/media/2020/may/27/local-radio-regional-stations-england-bauer-rebranding-national-network>

UK radio stations – digital

The BBC operates 11 UK-wide DAB stations while commercial broadcasters run 43 services. As with the local analogue radio sector, the share of ownership of national commercial DAB stations is heavily concentrated in the hands of only a few companies. The three largest commercial broadcasters – Global (16 stations), Bauer (10) and Wireless Group (7) – control more than three-quarters of the nationwide DAB market. Following the launch of Times Radio in June 2020, Wireless Group (a subsidiary of News UK, publishers of The Sun and The Times newspapers) now operates four UK-wide talk radio and news stations – more than any other radio broadcaster, including the BBC.

Table 18. National commercial DAB radio ownership (Feb 2021)

Owner	Number of stations	Share of total
Global Radio	16	37.2%
Bauer Radio	10	23.3%
Wireless Group	7	16.3%
Jack Radio Group	3	7.0%
Premier Christian Media Trust	2	4.7%
United Christian Broadcasters	2	4.7%
BFBS	1	2.3%
Children's Radio UK Ltd	1	2.3%
Lyca	1	2.3%
Total	43	100%

(Source: www.ukdigitalradio.com)

Podcasting

RAJAR estimates that 10.1 million people in the UK listen to podcasts, amounting to an increase of 4.2 million listeners since 2018.[40] Research by Ofcom in March 2020 details the most common sources used to access podcasts, the data for which is replicated in Table 19. BBC Sounds, the BBC's audio streaming service, is used by 38% of podcast listeners but the app is now tied with Apple Podcasts/iTunes as the most used podcasting source. Three of the top five podcasting services are owned and operated by just two large US-based technology companies with revenues orders of magnitude larger than the BBC's. Apple's 2020 turnover was £226.8 billion while Alphabet Inc (YouTube and Google Podcasts) made £140.7 billion.

Table 19. Podcast use in the UK (2020) [41]

Podcast Sources	Proportion of podcast listeners
BBC Sounds	38%
Apple Podcasts/iTunes	38%
Spotify	37%
YouTube	30%
Google Podcasts	12%
Soundcloud	9%
Newspaper site/app	7%
RadioPlayer	6%
Castbox	5%
Globalplayer	4%

(Source: Ofcom)

[40] https://www.rajar.co.uk/docs/news/MIDAS_Spring_2020.pdf (pg. 6)

[41] https://www.ofcom.org.uk/_data/assets/pdf_file/0010/200503/media-nations-2020-uk-report.pdf (pg. 42)


CONCLUSION

The levels of concentration revealed in this report demonstrate that we need action to challenge blockbuster media and tech companies and the influence that flows from their dominance of infrastructure, content and distribution.

There is a long-established policy principle in the UK that public responsibilities should be attached to significant media power. Up to now, this principle has been invoked in respect of broadcasting but as media markets and services converge and as more and more content is made available through monopolies such as Facebook and Google, it is increasingly applicable to other platforms. There is a need to ensure that dominant media and tech companies not currently subject to public service regulation are nevertheless held accountable to the public through other effective forms of regulation.

It is time for an open and honest debate about the impact of media concentration on our democracy and our wider culture. The Media Reform Coalition believes that media plurality is not a luxury in the digital age but an essential part of a media system in which vested interests should not be allowed to dominate. We want to see independent media that are able to hold power to account and to serve their audiences and the public in general as opposed to shareholders, proprietors or politicians.

In order to achieve this, we need a rebooted system of regulation that gets to grips with the complexities of media ownership in the twenty-first century; one that encompasses top-down measures to check the dominance of individual or corporate interests as well as bottom-up measures to support genuinely independent and not-for-profit media on the ground. Above all, we need a new system of regulation that addresses both the enduring (and in many ways intensifying) grip of legacy media on public debate; as well as the control over news and information 'flow' wielded by tech giants.



As revenues across traditional print and broadcast formats continue to fall, we need to ensure that any future public subsidies in news and media content are allocated democratically and are aimed at promoting effective, independent, public interest reporting. As Australia's farcical News Bargaining Code has made abundantly clear, public investment and intervention must not be used to subsidise a handful of dominant media corporations—many of which are responsible for cutting investment in local and regional news services—at the expense of smaller community-based enterprises.

Meanwhile, Ofcom, the communications regulator, continues to labour under the assumption that the status quo of media plurality in the UK is acceptable, despite the evidence gathered here that shows we should be seriously concerned. We are witnessing a rapid consolidation of the news industry—especially at the local and regional level—which is putting control of newsgathering and production in progressively fewer hands. The government has long promised regular plurality reviews that could address dynamic and organic changes in media markets which wield further concentration. To date, nothing has been done to implement this.

At a time of intensifying political instability and seemingly continuous elections and referenda, we urgently need a programme of genuinely progressive reform aimed exclusively at a more fair, free, accurate, and accountable media. And if we want to lay the foundations for a media that represents the full diversity of the UK population, its opinions, its communities, its constituent nations and indeed its divisions, then we need to take action now to curb media power.

About the lead researcher

Tom Chivers holds a doctorate in Media and Communications from Goldsmiths, University of London, where he has also lectured on media history and politics. His research focuses on policymaking in the UK's press and broadcasting media sectors, and his ESRC-funded PhD thesis analysed the 2016 BBC Charter Review and press regulation after the phone hacking scandal. Tom currently works as a researcher for the Media Reform Coalition and has previously worked with the 2015 Future of TV inquiry.

About the report

Research carried out by Dr Tom Chivers for the Media Reform Coalition and as part of the Center for Media, Data and Society's Media Influence Matrix, set up to investigate the influence of shifts in policy, funding, and technology on contemporary journalism. The UK component of Media Influence Matrix is coordinated in partnership with Goldsmiths, University of London and is funded by the Joseph Rowntree Charitable Trust. Please visit the Goldsmiths Leverhulme Media Research Centre to see Appendix 1 and the full datasets used in this report.

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Designed by Anna Orosz

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