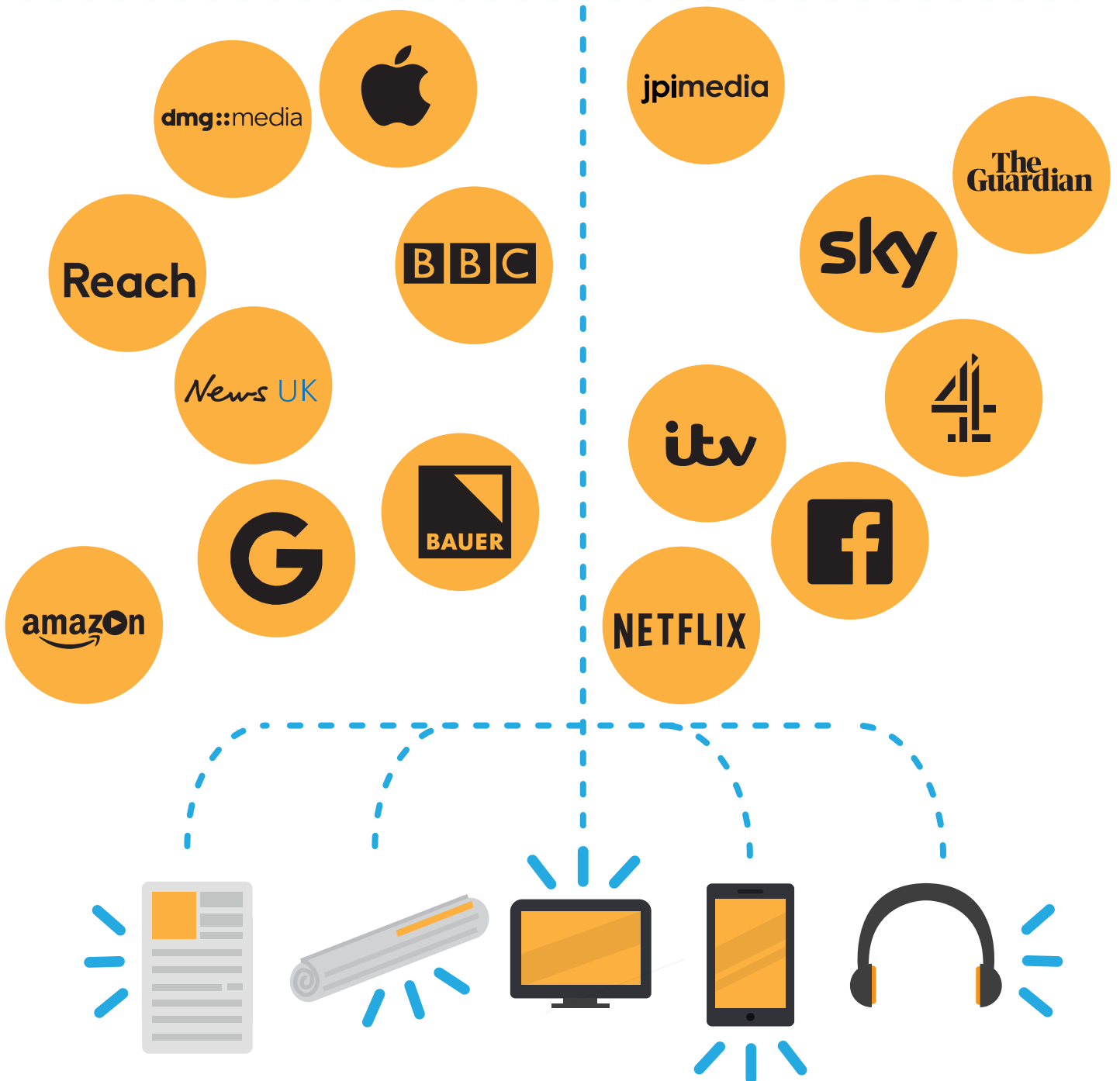


WHO OWNS THE UK MEDIA?

Executive Summary



What does it mean to have a 'free' media when the nation's social media platforms, TV channels, news outlets, radio stations and search engines are owned by a handful of giant corporations? What does it mean to have 'independent media' when many of our most influential news organisations are controlled by individuals and Boards that are so closely connected with vested interests?

This is a revised version of the ownership report that the Media Reform Coalition first produced in 2015. While there has been a huge amount of activity in the media – with falling levels of trust in journalism, the further decline of national newspaper circulation, the rise of new sources of news, declining audiences for linear television and the emergence of debates around 'fake news' – broader patterns around concentrated ownership persist and, indeed, we believe the situation is getting worse.

NATIONAL NEWSPAPERS

- National newspapers have seen a circulation decline of almost one quarter since 2015 though their reach has been hugely extended thanks to digital consumption. The market continues to be dominated by News UK and DMG Media, which account for over 60% of print sales, while Total Brand Reach (TBR) figures show that across the UK's national newsbrands, five publishers account for 80% of aggregated online and offline reach.
- Almost 50% of the combined revenue of the UK's national newsbrands (print and digital) is generated by two publishers: DMG Media Ltd and News Corp UK and Ireland.

LOCAL NEWSPAPERS

- Since 2015 the UK's local newspaper market has become even more concentrated, with five publishers (down from six in 2015) accounting for 80% of titles. The remaining 20% are spread across 57 smaller publishers.

NEW DIGITAL JOURNALISM

- While recent years have seen the emergence of digital news sites catering to traditionally underserved audiences, the reach of new UK digital news sites ranges from around 100,000 to 1,000,000 average monthly UK visits, a fraction of the online traffic enjoyed by legacy national and local news outlets.
- The most popular UK news sites by reach also reflect the dominance of the traditional broadcast and print outlets, ranging from the BBC (74% of the digital audience) to the Metro (33%). No digital-first news sites feature in the top ten.

PLATFORMS AND INTERMEDIARIES

- UK media markets cannot be considered in isolation from the platforms and intermediaries that increasingly determine how audiences access and consume media content. Apple (revenue: £203bn), Amazon (£178bn) and Alphabet/Google (£99bn) dwarf the UK's largest media organisations.
- The small number of US-based companies that dominate social media (Facebook/Instagram, Twitter, SnapChat) play a growing role in UK news consumption, but largely perpetuate the dominance of large legacy news organisations such as the BBC and other broadcasters together with national newspaper sites.

TELEVISION

- Commercial broadcasters such as BT, Sky and Viacom International (owners of Channel 5) are by revenue – if not by audience share – far larger than the BBC and other terrestrial Public Service Broadcasters.
- The growth of Video on Demand providers in UK television consumption brings US companies like Netflix (revenue: £12.1bn; BBC revenue: £5.06bn) and multi-market giants Apple, Amazon and Alphabet into direct competition with UK providers.

RADIO AND PODCASTING

- While the BBC attracts the largest share of radio listening (51.7%) and accounts for 57% of radio revenue/investment, commercial radio continues to be dominated by two companies: Bauer and Global, which account for 46% of analogue and 66% of digital commercial stations in the UK.
- In podcasting the BBC is again the single most-used platform for UK audiences (used by 36% of UK podcast listeners), but Alphabet (YouTube: 26%; GooglePlay: 7%) and Apple (iTunes: 26%) are the Corporation's biggest rivals.

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

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.

See the whole report at:
www.mediareform.org.uk

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