

2023 Report

WHO OWNS THE UK MEDIA?



MEDIA REFORM
COALITION

Our key findings at a glance:

Just 3 companies – DMG Media, News UK and Reach – dominate 90% of the UK's national newspaper market. These same three companies account for more than 40% of the total audience reach of the UK's top 50 online newsbrands, giving these publishers an unrivalled position for setting the news agenda.

71% of the UK's 1,189 local newspapers are owned by just six companies. The two largest local publishers – Newsquest and Reach – each control a fifth of the local press market, more than the combined share of titles owned by the smallest 173 local publishers.

10 of the top 15 online platforms used to access news in the UK are owned by Meta, Google and X Corp (owners of X/Twitter). Meta and Google command around four-fifths of all online advertising spend, giving these two tech giants unparalleled power over how online news is found and funded.

Netflix, Amazon Prime and Disney+ account for 80% of all UK video-on-demand subscriptions. While Sky TV still dominates the pay-TV market with 9.1 million customers, twice as many households subscribe to at least one streaming service – with Netflix making up almost two-fifths of all combined subscriptions.

Two companies – Bauer Radio and Global Radio – own 65% of the UK's local commercial analogue radio stations. Bauer, Global and Wireless Group (owned by publishers News UK) also control more than three-quarters of the UK's national commercial DAB radio market.

Media moguls and Big Tech tycoons



Jonathan Harmsworth, Viscount Rothermere — Daily Mail and General Trust

- + Chairman and sole owner of the Daily Mail and General Trust, and great-grandson of the founder of the Daily Mail.
- + Rothermere controls 40% of the UK's national newspaper market through the Daily Mail, Mail on Sunday, the i and Metro.
- + Despite his inherited peerage and estimated net worth of over £1bn, Rothermere and his businesses avoid paying UK tax through "non dom" status and off-shore company registrations.

The Murdoch family — News UK

- + Publishers of the Sun and The Times, Rupert Murdoch's News UK controls one-third of the national newspaper market. News UK also operates TalkTV, TalkRadio and talkSPORT.
- + Through Fox Corp and News Corp (News UK's parent company), Murdoch also owns Fox News and the New York Post in the US, Australian pay-TV network Foxtel and The Australian newspaper, book publishers HarperCollins and many more.
- + Although his son Lachlan has recently taken over as CEO of Fox Corp and chair of both companies, Rupert Murdoch – estimated net worth £6.5bn – is likely to stay closely involved in operating the family's global media empire.



Evgeny Lebedev — Lebedev Holdings

- + The son of a Russian oligarch, Evgeny Lebedev owns London's Evening Standard newspaper and the largest share of ownership in the Independent online newspaper.
- + The significant online reach of these outlets, together with the Standard's substantial local print circulation, gives Lebedev's titles the 6th largest reach amongst the UK's top 50 online 'newsbrands'.
- + Alongside his family wealth (estimated at £2.4bn in 2008) and private business interests, Lebedev was nominated for a life peerage by Boris Johnson, becoming Baron Lebedev of Hampton and Siberia in 2020.

Media moguls and Big Tech tycoons

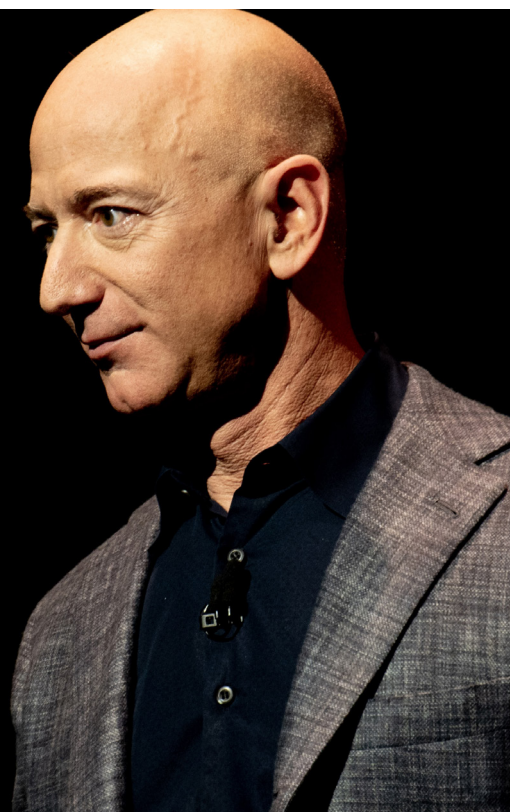


Mark Zuckerberg — Meta

- + Founder, CEO and owner of Meta, which controls Facebook, Instagram, WhatsApp and many other companies.
- + Meta plays a major role in how people find and access content online: in the UK, 72% of people who get their news online do so through Meta's websites, apps and services.
- + Meta also dominates the online advertising market, with Facebook and Instagram accounting for over half of all UK display advertising spend in 2019.
- + In recent years Meta has spent hundreds of millions lobbying against 'Big Tech' regulations in the UK, the EU and the US

Jeff Bezos — Amazon

- + Founder, CEO and major shareholder in Amazon, the world's largest e-commerce and internet services company with revenues of over £400bn.
- + Amazon Prime is the UK's second largest streaming service, while Amazon Music, Audible and the Amazon Echo smart speaker dominate the digital audio and music markets.
- + Bezos' net worth is estimated at £120bn. He also owns the Washington Post, which he purchased in 2013 for \$250m (approx. £205m).



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

This report is the Media Reform Coalition’s fifth study on media ownership in the United Kingdom, covering data for the period since our previous report in March 2021. The UK’s media industries faced significant challenges due to Covid-19, but the relative ‘return to normal’ in public life has not halted or reversed the on-going collapse in media plurality, news diversity and public interest journalism exposed by the pandemic.

In fact, our updated findings indicate that the endemic crisis of concentrated media ownership in the UK has worsened, with even fewer companies controlling larger shares of the media landscape.

Since our last report, large companies have continued to expand their dominant market positions through mergers and takeovers. In March 2022 Newsquest bought out local publishing rivals Archant, taking control of its 7% market share and cementing Newsquest’s place at the top of a heavily concentrated pack. The forthcoming auction of the Telegraph titles and Spectator magazine risks further reducing the already pitiful diversity of voices in the UK’s national press. With potential bidders including the Daily Mail General Trust and a co-owner of GB News,¹ the sale could merely transfer ownership of these titles from one set of offshore right-wing oligarchs to another. In telecoms, the owners of Vodafone and Three are seeking a merger to create the UK’s largest mobile phone network, no doubt encouraged by Ofcom’s softened stance on corporate consolidation across the UK media industry.²

1. The Telegraph, [‘Chairman appointed to spearhead sale of The Telegraph’](#), 17 July 2023.

2. Vodafone, [press release 14 June 2023](#); The Guardian, [‘Price hike fears as Ofcom softens stance on mobile firms mergers’](#), 9 February 2022.

Local journalism is in peril, as the collapse of print advertising and persistent job cuts by the largest publishing companies have deprived local communities of news made for and about them.³ 2.5 million people live in areas without a single local newspaper, and across print and online publishing more and more local titles are being closed or consolidated into generic ‘hub’ websites, producing little to no news in the areas they claim to cover.⁴ Despite the launch of a number of independent and hyper-local outlets, the absence of sustainable funding and support for local public interest journalism means the sector remains shackled to the commercial imperatives of a few apathetic publishing giants.

UK broadcasting faces similarly dangerous levels of corporate concentration, cost-cutting and loose commitments to regulatory standards. Although the BBC remains the dominant player across TV and radio, its founding public service mission has been undermined by licence fee freezes, political interference and a questionable strategy to find its digital future. In entertainment the BBC is being squeezed out by falling linear audiences and global streaming competitors like Netflix, Amazon and YouTube, and the Corporation continues to cut back its highly valued local and regional radio output. Public trust in the BBC has fallen precipitously in recent years,⁵ while the new opinion-led channels GB News and TalkTV regularly exploit Ofcom’s light-touch approach to regulating basic standards of accuracy, impartiality and public interest reporting.

Surrounding and intensifying this crisis in UK media ownership are powerful and unaccountable global tech giants that own huge swathes of the spaces and technologies we use to fund, find and access media content online. As we detail in an expanded section on online intermediaries, Alphabet (owners of Google and YouTube) and Meta (owners of Facebook, Instagram and WhatsApp) hold almost monolithic control over online advertising, user data, content distribution and news curation – amounting to an unprecedented concentration of ownership in the online media supply chain.

The findings in this report, together with our Manifesto for a People’s Media,⁶ demonstrate the urgent need for reform. Government, regulators and Parliament must act to hold these platforms to account, to protect against further losses in media plurality and diversity, and to create new models for funding, governing and participating in an independent and truly democratic media commons.

3. Enders Analysis (2023) [Signs of local life: A new phase for local media](#). Enders estimates that SME advertising spend on the UK local press in 2022 was £421m, three-quarters less than in 2008 (£2bn) and less than 5% of what SME businesses spent to advertise with Google in 2022 (£8.6bn).

4. Public Interest News Foundation (2023) [Deserts, Oases and Drylands: Mapping the UK’s local news outlets](#).

5. YouGov Trust Tracker; see also Novara Media, ‘[Brits have fallen out of love with the BBC](#)’, 2 August 2023.

6. Media Reform Coalition (2022) [Manifesto for a People’s Media: Creating a Media Commons](#).

Digital technologies and online platforms have transformed how the British public find, access and consume all kinds of media content. Nearly half of UK adults stream music online, four in ten households have a smart speaker, and over 57 million people are active social media users.⁷ Non-broadcast audiovisual formats like streaming and video-sharing have risen markedly as a share of UK audiences' daily viewing, from 29% in 2017 to 40% in 2022.⁸

These same trends are reflected in the platforms used for news. In the last five years the share of people using TV as a main source of news has fallen from 79% to 70%, while those using online news sources (including websites, news apps, social media and podcasts) has risen from 64% to 68%. Online news use is especially strong amongst younger audiences, with 83% of 16–24 year-olds using internet sources as a main news platform and far fewer using television (47%), radio (25%) or print newspapers (16%).⁹

Online intermediaries (OIs) such as social media (e.g. Facebook, Twitter), search engines (e.g. Google, Bing), news aggregators (e.g. Google News, Apple News) and video-sharing websites (e.g. YouTube, Vimeo) play a pivotal role in how news content is distributed, curated, discovered and monetised online. 64% of the UK public regularly uses an OI to access news,¹⁰ and many of the most popular online sources are controlled by a handful of global 'Big Tech' corporations. As shown in Table 1, 10 of the top 15 websites, apps and platforms used to access news are owned by just three companies: Meta, Alphabet and X Corp. Across all UK users who access news online, 72% use services controlled by Meta and 71% use services owned by Alphabet.¹¹

Table 1. Top 15 online sources used for news nowadays (2022)¹²

News source	Company	% of UK pop.	Total UK users
Facebook	Meta	33.4%	22.4 m
BBC website/app	BBC	28.3%	19.0 m
YouTube	Alphabet	21.3%	14.3 m
Google search	Alphabet	20.4%	13.7 m
Twitter	X Corp	19.5%	13.1 m
Instagram	Meta	14.9%	10.0 m
WhatsApp	Meta	14.7%	9.8 m
Daily Mail website/app	DMG Media	11.0%	7.4 m
Guardian & Observer website/app	Guardian Media Group	10.9%	7.3 m
Google News	Alphabet	10.7%	7.2 m
Sky News website/app	Comcast	10.4%	7.0 m
Apple News app	Apple	8.9%	6.0 m
TikTok	ByteDance	8.0%	5.4 m
Any local/regional newspaper website/app	–	7.6%	5.1 m
Snapchat	Snapchat	6.0%	4.0 m

7. Ofcom [Media Nations 2023](#) (pgs. 65 and 69); Statista, [Active social media audience in the UK in January 2023](#).

8. Ofcom Media Nations reports [2018](#) (pg. 21) and [2023](#) (pg. 7).

9. Ofcom [News Consumption in the UK 2023 report](#) (pgs. 3–4).

10. Ipsos/Ofcom [Media Plurality Quantitative Report 2022](#) (pg. 10).

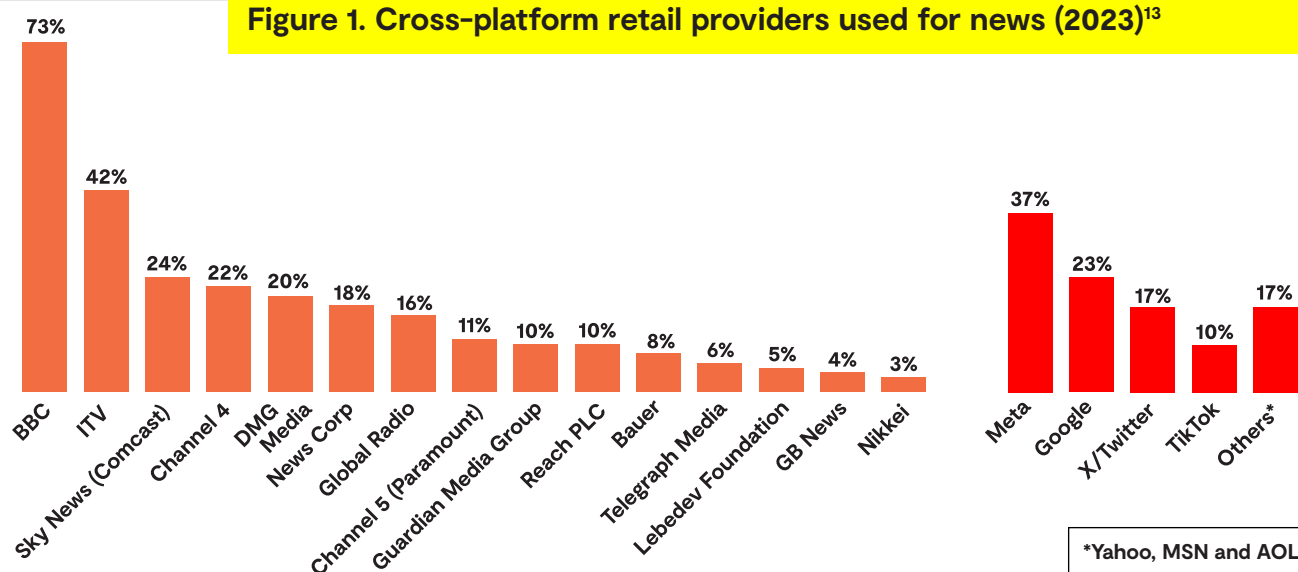
11. Ipsos MORI/Ofcom [Media Plurality and Online News survey](#) (data tables 42, 44 and 45), all adults 16+.

12. Ibid. Total users projected from [ONS figures of UK population](#), 2021.

Why media ownership still matters

However, the growing significance of online intermediaries does not mean that ‘traditional’ news producers are less influential, or that concentrated media ownership in online media poses any less of a threat to plurality and diversity. Figure 1 shows the cross-platform reach of the major news providers across broadcasting, print and online formats. Although the UK’s two public service broadcast news providers – BBC and ITN (for ITV, Channel 4 and Channel 5) – are by far the largest sources of cross-platform news, Sky News (owned by Comcast), publishers DMG Media and Rupert Murdoch’s News Corp also command a substantial cross-media news audience.

Figure 1. Cross-platform retail providers used for news (2023)¹³



Looking at online intermediaries, Meta’s services (Facebook, Instagram and WhatsApp), Google and X/Twitter are used for news by larger audiences than many of the UK’s major broadcast and print media outlets. Despite not making any news themselves, these three companies control some of the most significant channels through which the British public reads, watches and engages with UK news content. Analysis by the Competition and Markets Authority (CMA) suggests that in 2019 almost two-fifths of UK publishers’ total web traffic came from Google and Facebook. More than half of those who use the internet for news users get news content through search engines – a space where Google dominates – and three-quarters of UK internet users use Facebook, WhatsApp or YouTube.

40%

web traffic to UK publishers from Google and Facebook¹⁴

93.7%

Google’s share of UK search engine use¹⁵

3 out of 4

UK internet users active on social media sites owned by Meta or Alphabet¹⁶

13. Ofcom [News Consumption in the UK 2023 report](#) (pg. 10). Figures refer to the percentage of UK adults (16+) who use each platform for news nowadays.

14. CMA [Online platforms and digital advertising market study Appendix S](#), July 2020 (pg. 6).

15. Statcounter, [UK share of search](#) (August 2023).

16. Ofcom [Adults’ Media Use and Attitudes report 2023](#) (pg. 13).

Online intermediaries and news diversity

Online intermediaries are not simply ‘neutral’ services that allow news providers – large or small, corporate or community-owned – to reach audiences online and earn advertising revenues on an equitable basis. Rather than enhancing news media diversity, these platforms instead reflect and entrench existing patterns of concentrated ownership, benefitting the same handful of companies that already dominate the UK’s print and broadcast markets. Table 2 lists the top 15 online ‘newsbrands’ in the UK in July 2023. Table 3 similarly lists the 15 most-followed accounts of news organisations on the UK’s five largest social media platforms.

In both cases, a small number of mainstream corporate newspapers and broadcast news outlets that already dominate their respective markets (see subsequent sections) attract an outsized share of reach on online platforms, despite these spaces being populated with many thousands of other outlets and millions of individual users. It is likely that these figures may even understate the true extent of users’ interactions with these outlets online. Ipsos MORI research for Ofcom in 2022 identified significant gaps between people’s perceived and actual use of online news sources, where respondents consistently under-reported the major news providers’ websites or apps they had visited over a one-month period.¹⁷

Table 2. Top 15 newsbrands in the UK (July 2023)¹⁸

Newsbrand/Website	Company	Audience	Reach
BBC	BBC	37.9 m	76%
The Sun	News Corp	24.3 m	49%
Mail Online	DMG Media	23.9 m	48%
Mirror	Reach	22.7 m	45%
The Independent	Lebedev	21.3 m	43%
The Guardian	Guardian Media Group	20.7 m	42%
Sky News	Comcast	18.6 m	37%
ITV	ITV	15.1 m	30%
Metro	DMG Media	14.2 m	28%
The Telegraph	Telegraph Media Group	13.8 m	28%
Money Saving Expert	Money Saving Expert	13.4 m	27%
Daily Express	Reach	12.3 m	25%
Times & Sunday Times	News Corp	11.4 m	23%
Manchester Evening News	Reach	11.1 m	22%
The Evening Standard	Lebedev	10.5 m	21%






This is partly a result of the logics and technologies that characterise these platforms: opaque news curation processes for selecting which stories or outlets are shown to users; displaying aggregated content without proper attribution; algorithm-driven content customisation and recommendations based on for-profit models; and unaccountable corporate decision-making concerning content moderation, source accreditation and

17. Ipsos/Ofcom [Media Plurality Quantitative Report](#) (pg. 14).

18. Press Gazette/Ipsos iris, [‘Top 50 UK news websites in July’](#), August 24 2023.

the monetisation of user data.¹⁹ These practices not only disincentivise the production of investigative journalism or public interest news, but also harm the effective reach of and public access to independent or local news outlets. Conversely, the predominant factors that drive ‘successful’ news on OIs (especially social media platforms) appear to encourage and reward content founded on inaccuracy, disinformation, divisive or antagonistic sentiments and ‘clickbait’.

Table 3. News organisations followed on social media, % of UK platform users²⁰

Facebook 		Instagram 		Snapchat 		Twitter / X 		TikTok 	
BBC	51%	BBC	43%	BBC	33%	BBC	50%	BBC	50%
ITV/STV	28%	Sky News	24%	ITV/STV	32%	Sky News	30%	ITV/STV	30%
Sky News	26%	ITV/STV	19%	Sky News	20%	ITV/STV	18%	Sky News	18%
The Daily Mail	15%	The LAD Bible	17%	The Sun	19%	CNN	14%	CBS News	14%
YouTube	14%	YouTube	15%	The LAD Bible	18%	Channel 4	11%	BuzzFeed	11%
The LAD Bible	13%	BuzzFeed	14%	CNN	15%	The Guardian/ Observer	11%	The LAD Bible	11%
CNN	12%	Channel 4	11%	Channel 4	15%	YouTube	9%	CNN	9%
BuzzFeed	12%	CNN	10%	BuzzFeed	13%	BuzzFeed	9%	Channel 4	9%
The Sun	11%	The Daily Mail	10%	News Now	13%	The Times/Sunday Times	7%	The Daily Mail	7%
Channel 4	11%	The New York Times	8%	The Daily Mail	13%	The Telegraph	7%	The Daily Express	7%
The Guardian/ Observer	9%	The Guardian/ Observer	7%	The Daily Express	11%	The LAD Bible	7%	The Evening Standard	7%
The Telegraph	8%	The Sun	7%	Time magazine	9%	The Daily Mail	7%	The Daily Mirror	7%
The Metro	8%	The Telegraph	7%	The Independent	9%	The Independent	7%	The Metro	7%
The Daily Mirror	6%	The Economist	5%	CBS News	9%	Huffington Post	6%	The Telegraph	6%
The Independent	6%	Time magazine	5%	YouTube	9%	The Sun	6%	The Sun	6%

Such features are not a unique creation of online intermediaries or digital news spaces. It is ironic that in identifying certain UK legacy media organisations as authoritative, trustworthy or legitimate sources²¹, OI operators have afforded privileged status to outlets with a long record of unethical practices, regulatory breaches and systemic partisan biases.

Two of the UK’s largest newspaper publishers – News Corp and Reach – are embroiled in legal challenges from politicians, celebrities and members of the public over historic claims of phone hacking, harassment and privacy intrusion²². GB News and TalkTV – both set up by billionaires and fronted by shock-jocks and right-wing politicians – revel in laundering anti-vaccine conspiracies, promoting climate change denial and polarizing audiences with sensationalist mock-journalism. Both channels are subject to numerous regulatory investigations by Ofcom, and in just the last year GB News has been found in breach of the Broadcasting Code three times.²³

19. Ofcom [Media plurality and online news: Discussion document](#), November 2022.

20. Ofcom [News Consumption survey 2023](#), <D12a> all adults 16+.

21. See Google submission to Ofcom consultation on media plurality (pg. 6).

22. Guardian, ‘Sun publisher sets aside further £128m to cover phone-hacking cases’, 7 April 2023; Guardian, ‘[Piers Morgan knew of phonehacking when at the Mirror, high court hears](#)’, 10 May 2023.

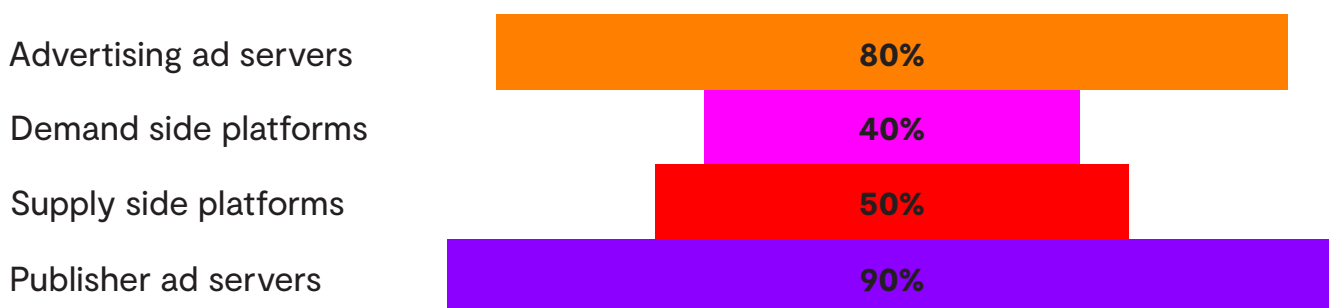
23. See Ofcom press releases [6 March 2023](#), [9 May 2023](#) and [18 September](#).

Market concentration in online advertising

Control of online advertising is highly concentrated between Alphabet and Meta, each holding near-monopolies over the advertising mechanisms in their respective markets (search and social media). In 2022 advertisers spent £26.1bn (75% of total UK advertising spend) on online platforms, with an estimated £20.8bn of that (59% of total UK ad spend) going to just Google and Facebook.²⁴ In 2019, Google generated over 90% of all UK search advertising revenue while Meta's Facebook and Instagram jointly accounted for over half of all UK display advertising.²⁵

In the 'open display' advertising market, where automated services allow advertisers and publishers to bid in real-time for the buying and selling of advertising space, services owned and operated by Google dominate all parts of the 'tech stack'.

Figure 2. Google market share in the open display 'tech stack', by function²⁵



The dominance of online advertising by these two tech giants poses a severe threat to both fair competition and sustainable funding for public interest journalism. As Table 4 shows, publisher revenues have declined significantly since 2019 while income from digital advertising has risen both in real terms and as a share of total turnover. Publishing companies, new online news outlets and independent journalists alike are thus increasingly dependent on a digital advertising market controlled and operated by the same companies that they already depend on to get their content distributed.

Table 4. Newspaper publisher revenues, by income type²⁶

Revenue (£m)	2019	2020	2021	Change 2019-21 (%)
Print circulation	1,482	1,349	1,294	-12.7%
Digital subscriptions	374	401	422	+12.8%
Print advertising	1,160	729	736	-36.6%
Digital advertising	556	485	618	+11.2%
Total	3,572	2,964	3,070	-14.1%
% as digital advertising	15.6%	16.4%	20.1%	+29.3%

24. Advertising Association/WARC [Expenditure Report FY2022](#). Google/Facebook share of advertising spend projected from CMA estimations in its 2020 [Online platforms market study](#) (pgs. 9-10).

25. CMA, [Online platforms and digital advertising: market study final report](#), July 2020 (pg. 10, see pg. 271 for estimates of Google 'tech stack' share).

26. Reproduced from [Ofcom Media plurality and online news: Discussion document](#), November 2022 (pg. 14).

As detailed in our previous report, newspaper circulation fell significantly during the Coronavirus pandemic. Although figures steadied throughout late 2020 and 2021, the long-term trend of declining print circulation has continued and highlighted the contrasting market positions of the UK's tabloid and broadsheet press.

Market share by print circulation (ABC)

Between 2020 and 2022, the average combined circulation of national dailies fell by 4.6%. Audit Bureau of Circulation (ABC) figures show that the Daily Star (-25%), the Daily Express (-22%) and the Daily Mirror (-22%) accounted for the largest losses in circulation. Metro (35%) and the Financial Times (5.6%) were the only titles to gain over the two years, though neither paper has achieved circulation above their pre-Covid levels. Since 2017 average circulation of the UK's national dailies has fallen by almost 40%, from 675,887 to 412,821. As Table 5 shows, DMG Media's Metro has joined the Daily Mail and News UK's the Sun as the dominant titles in the national newspaper market, each accounting for around one-fifth of the share of total daily circulation.

Table 5. Average daily print circulation, national newspapers (2022)²⁷

Publication	Share of circulation (2022)	Average circulation (2022)	% change 2021-22	Average circulation (2020)	% change 2020-22
The Sun	23.31%	1,058,350	-5.87%	1,102,263	-3.98%
Metro	22.50%	1,021,687	13.08%	754,922	35.34%
Daily Mail	18.83%	855,229	-9.21%	1,028,879	-16.88%
The Times	7.24%	328,700	-2.72%	323,817	1.51%
Daily Mirror	6.82%	309,663	-12.62%	397,379	-22.07%
Daily Telegraph	5.14%	233,255	-8.97%	264,520	-11.82%
Daily Express	4.39%	199,232	-14.70%	258,665	-22.98%
Daily Star	3.98%	180,595	-15.30%	243,474	-25.83%
The i	3.10%	140,646	-1.90%	163,417	-13.93%
Financial Times	2.53%	114,924	2.00%	108,809	5.62%
Guardian	2.17%	98,755	-7.93%	115,626	-14.59%
	100.00%	4,541,034	-3.96%	4,761,770	-4.64%

Source: ABC/MRC[†]

Sales of national Sunday newspapers have fallen even more sharply across the market. Average combined circulation fell by 835,000 (-23%) between 2020 and 2022, representing a decline in Sunday circulation of almost 50% since 2017. Much like the national daily market, Sunday circulation is dominated by the Mail on Sunday and the Sun on Sunday, which together accounted for more than half of all Sunday papers sold in 2022.

27. The following papers have withdrawn from submitting or publishing ABC figures: The Sun, The Times, the Daily Telegraph and their Sunday editions (withdrawn in 2020), and the Guardian and Observer (withdrew in August 2021). Average circulation figures for these titles are calculated from industry trends and company reporting – see this report's accompanying [online data sheets](#)[†] for the full methodology.

Table 6. Average weekly print circulation, national Sunday newspapers (2022)

Publication	Share of circulation (2022)	Average circulation (2022)	% change 2021-22	Average circulation (2020)	% change 2020-22
Mail on Sunday	26.20%	728,164	-11.81%	894,207	-18.57%
Sun on Sunday	24.51%	681,067	-15.58%	917,018	-25.73%
Sunday Times	17.60%	489,023	-12.74%	600,811	-18.61%
Sunday Mirror	8.52%	236,740	-17.25%	327,251	-27.66%
Sunday Express	6.24%	173,520	-15.68%	229,148	-24.28%
Sunday Telegraph	5.82%	161,749	-17.88%	223,763	-27.71%
Observer	4.37%	121,327	-11.86%	146,004	-16.90%
Daily Star Sunday	3.66%	101,679	-19.33%	148,933	-31.73%
Sunday People	3.08%	85,606	-21.71%	127,728	-32.98%
	100.00%	4,541,034	-3.96%	4,761,770	-4.64%

Source: ABC/MRC†

The combined weekly circulation of national daily and Sunday newspapers remains highly concentrated. Just three publishers – DMG Media (publishers of the Mail, Metro and i titles), News UK (The Sun, The Times and their Sunday titles) and Reach Plc (the Mirror, Express and Star titles) – accounted for almost 90% of all national newspapers sold in 2022. DMG Media alone controls two-fifths of combined weekly circulation (an increase of 3% since 2021), with News UK controlling a further third. If DMG Media buys out the Telegraph titles, a single publisher would be perilously close to controlling half of all national UK newspapers circulation.

Table 7. Combined weekly circulation by publisher (2022)

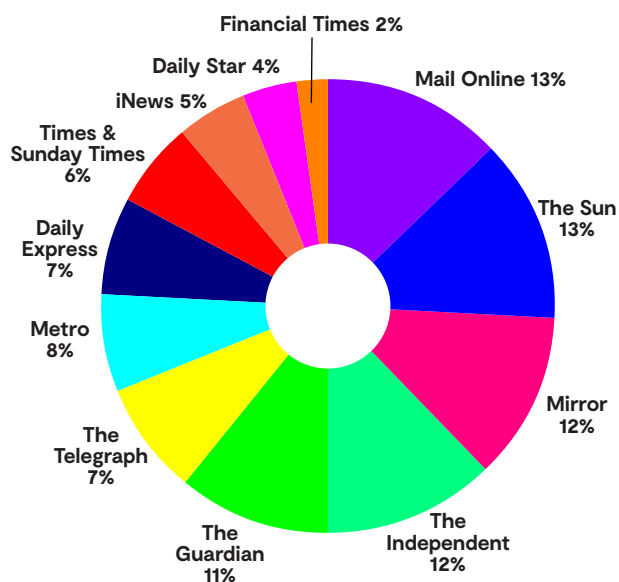
Publisher	Weekly circulation	Share of circulation	Cumulative share
DMG Media	12,118,948	41.60%	41.60%
News UK	9,492,386	32.59%	74.19%
Reach	4,553,890	15.63%	89.82%
Telegraph Media Group	1,561,279	5.36%	95.18%
Guardian News & Media	713,855	2.45%	97.63%
The Financial Times	689,542	2.37%	100.00%
	29,129,899	100.00%	N/A

Source: ABC/MRC†

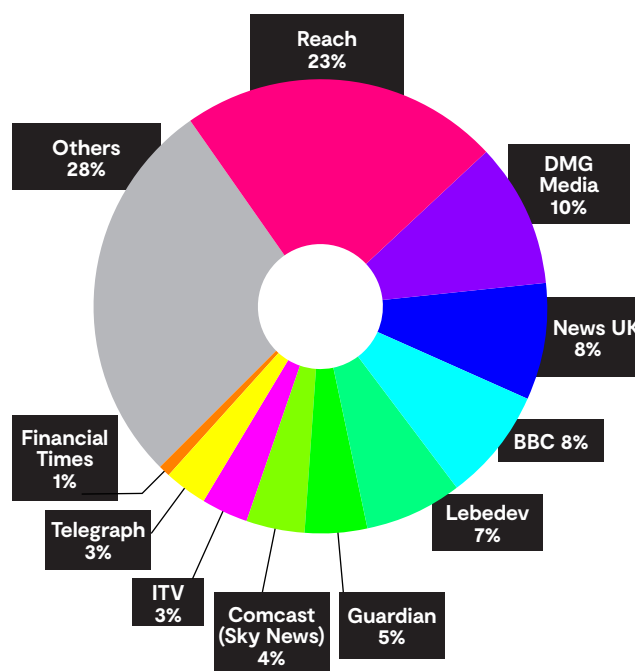
National newspapers: print and online audience reach

While print circulation has continued to decline, the growing online reach of national newspapers highlights the persistent trends of market concentration across UK news and media. The websites of national titles rank highly amongst the most-used news websites in the UK, and the same handful of publishers that dominate print circulation also dominate online audience reach. Comparing the reach of national newspapers' websites in July 2023, DMG Media, Reach and News UK accounted for more than two-thirds of the combined online reach of these newsbrands. Although the BBC's news website reached a larger audience (37.9m) than The Sun (24.3m), Mail Online (23.9m), and the Mirror (22.7m), the publishers of these three websites still command a significant share of the wider online news market. Looking at the reach of the UK's top 50 news website (including international and regional titles), Reach, DMG Media and News UK accounted for 41% of combined online reach. Titles owned by Reach amounted to more than a fifth of total online reach, only slightly less than the combined share of all other top 50 news websites not owned by broadcasters or major publishers.

Combined online UK reach,
UK national newspapers
(July 2023)



Combined online UK reach,
top 50 news websites
(by publisher, July 2023)



Source: Press Gazette/Ipsos iris, Adults 15+²⁸

28. Press Gazette, 'Top 50 UK news websites', data for July 2023.

Market share by revenue

Table 8 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 the Financial Times has yet to release recent accounting figures. News Corp and DMG Media account for almost half of all national publishing revenue, while Reach also controls more than 20% of total market turnover.

Table 8. Market share by revenue, national newspaper publishers

Company	Turnover	Market Share	Cumulative Share	Accounting date
News Corp UK & Ireland Ltd	£693,900,000	24.42%	24.42%	Jul 2022
DMG Media Ltd	£658,000,000	23.16%	47.58%	Sep 2022
Reach PLC	£601,400,000	21.17%	68.74%	Dec 2022
The Financial Times Ltd	£369,503,000	13.00%	81.75%	Dec 2021
Guardian News & Media Ltd	£264,400,000	9.31%	91.05%	Apr 2023
Telegraph Media Group Ltd	£254,200,000	8.95%	100.00%	Jan 2023
	£2,841,403,000	100%		

Source: Company accounts

As of August 2023, concentration in the UK local press remains incredibly high (Table 9). 71% of all local titles are controlled by just six companies, and the three largest publishers – Newsquest (22%), Reach (19%) and National World (15%) – each control a greater share of the market than the smallest 157 publishers combined.

These figures represent a decrease in total market concentration since our previous report, primarily as a result of the inclusion of around 170 additional independent or hyper-local titles that were not included in past calculations. However, it should be noted that even when accounting for a larger number of companies (194 total, compared to 56 in our last report), the market share of each of the three dominant publishers has fallen by only one or two percent.

Table 9. Local newspaper titles by publisher (August 2023)²⁹

Publisher	Titles	Share	Cumulative share
Newsquest	264	22.2%	22.2%
Reach	230	19.3%	41.5%
National World	186	15.6%	57.2%
Iliffe Media	63	5.3%	62.5%
Tindle Newspapers	55	4.6%	67.1%
Nub News	52	4.4%	71.5%
Bullivant Media	12	1.0%	72.5%
Midland News Association	12	1.0%	73.5%
MSI Media	12	1.0%	74.5%
Alpha Newspaper Group	11	0.9%	75.4%
Remaining 184 publishers	292	24.6%	100.0%
Total	1189	100%	

Source: MRC, PINF

Our 2021 ownership report highlighted how the Coronavirus pandemic had exposed and accelerated the damaging trends of closures, consolidations and corporate takeovers that characterise the UK's local newspaper industry. In the two years since that report, neither the industry nor government has acted to support ailing local titles or reverse the persistent concentration of local newspaper ownership into fewer and fewer hands. In March 2022 Newsquest's takeover of Archant – then the fifth largest local publishing company – was waved through without intervention by the Culture Secretary, cementing Newsquest's place as the dominant market player ahead of Reach and National World.³⁰

29. See accompanying MRC data sheets for a full list of local titles and publishers.

30. Press Gazette, ['Culture Secretary decides not to intervene in Newsquest takeover of Archant'](#), 6 July 2022.

Recent years have also exposed the realities of the local press industry's uncertain transition to digital publishing and online advertising models. Analysis by Press Gazette³¹ indicates that on-going local print closures have been balanced out by new title launches across print and digital formats. However, closer examination suggests that many of these new titles are either relaunches of previously shut-down titles, or consolidations of several local papers into a single edition. Many of the new launches also show larger publishers shifting away from dedicated local print titles and towards cheaper, less locally-embedded digital outlets. Of the 67 new launches identified between September 2020 and July 2022, more than 60% (41 titles) were online-only. Reach and National World accounted for more than half of these new digital titles, almost all of which are 'hub' websites serving large regional or county areas that were once served by multiple distinct local titles.

Declining local newspaper coverage

The persistent decline in the local press industry and the growing trend of digital consolidation have resulted in the growth of news 'droughts' and 'deserts' across the UK – local areas that are served by only one newspaper or do not receive any local newspaper coverage at all. Past research³² charted the geographic impact of title closures and market concentration, and a new mapping project by the Public Interest News Foundation (PINF) has further detailed the extent of declining local news coverage across the UK.³³

From a database of over 1,600 local news titles across print, online, TV and radio, PINF identifies several worrying gaps and deficits in news produced for and in local communities. Their map finds, for example, "a strong correlation between deprivation and local news coverage", with areas characterised by lower incomes, lower employment rates and greater disparities in health and education being covered by fewer local news titles.³⁴

Table 10 summarises the extent of declining local news coverage in the UK's local newspaper industry. Through analysis of the PINF mapping database – combined with MRC's own data on local print and online titles – we have identified 23 Local Authority Districts (LADs) across the UK that are not served by a single local newspaper. An additional 64 LADs are served by just one title, amounting to approximately 11.7 million people (17.5% of the UK population) living in areas characterised by news 'deserts' or 'droughts' in local newspaper coverage.

31. Press Gazette, '[UK local newspaper closures: Launches in digital and print balance out decline](#)', 26 July 2022.

32. Media Reform Coalition (2017) [Mapping changes in local news 2015-17](#); Plum Consulting (2020) [Research into research dynamics of the press sector in the UK and globally](#).

33. Public Interest News Foundation [Local News Map \(beta\)](#).

34. PINF (2023) [Deserts, Oases and Drylands: Mapping the UK's local news outlets](#) (pg. 20)

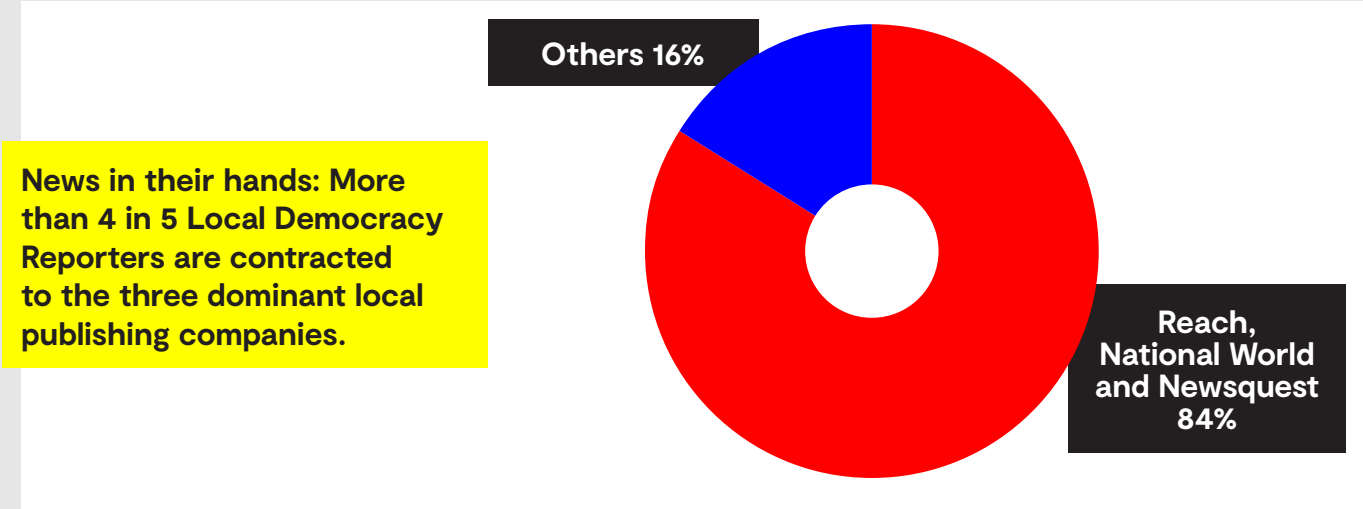
Table 10. Local newspaper ‘deserts’ and ‘droughts’ (August 2023)

Publisher	Local Authority Districts (LADs)	% of LADs	UK population ³⁵	% of UK population
Newspaper ‘deserts’	23	6.1%	2,597,615	3.9%
Newspaper ‘droughts’	64	17.1%	9,143,568	13.6%
‘Desert’ or ‘drought’	87	23.3%	11,741,183	17.5%
(out of 374)			67,026,307	

Source: MRC, PINF

The prevalence of news ‘droughts’ and ‘deserts’ across 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 that have moved to an online-only format or been merged into wider regional news ‘hubs’. Regular announcements of job cuts and redundancies across the UK’s local news industry, particularly by the largest publishers, nonetheless signal a deepening crisis in the sustainability of local journalism. Reach and DC Thomson announced plans to cut over 500 posts in just the first quarter of 2023, and National World has reduced its workforce by 27% (around 400 roles) since taking over the JPI Media titles in 2021.³⁶

Interventions across the wider local news industry are also having a limited impact, and without further investment and reform these will achieve nothing to compensate for the historic decline in commercial provision. The BBC Local Democracy Reporting Service, which provides licence-fee funded local reporters for covering local council business and other civic news topics, overwhelmingly favours established news outlets. Four-fifths of the full-time equivalent LDRS reporters for 2021-24 are contracted to Reach, Newsquest and National World,³⁷ which all share significant responsibility for creating the crisis that the BBC scheme is seeking to remedy.



35. UK and LAD population figures taken from [ONS estimates \(December 2022\)](#). Calculations do not include local TV or local radio coverage, meaning areas facing newspaper deserts or droughts may still be covered by other local news outlets. For local newspaper title database and tallies per individual LAD, see accompanying MRC data sheets.

36. Press Gazette, [‘UK and North America news media have cut 3,300+ jobs so far in 2023’](#), 13 April 2023; Press Gazette, [‘National World has cut one in four jobs since JPI takeover in 2021’](#), 31 July 2023.

37. BBC (2022) [Local Democracy Reporting Service, reporter contract distribution 2021-2024](#).

Ownership and revenue – UK terrestrial television

The gulf in turnover between domestic broadcasting networks and international on-demand subscription services has widened significantly. As well as earning revenues into the hundreds of billions, the major SVoD companies have also seen substantial and sustained revenue increases.

Table 11 lists the ownership and revenue of three groups of companies with primary or significant 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 which, while not involved in content production, operate internet services and pay-TV packages for distributing broadcasting content. The third group lists the main Video on Demand service providers, who distribute content primarily via their own websites or applications installed on digital devices.

In 2022 Netflix made four times as much as the BBC earned from its combined licence fee and commercial income, and saw a revenue growth of 29% since 2020 – in that same period, revenues for Amazon, Apple and Alphabet grew by 36%, 35% and 59% respectively.

Table 11. UK broadcasting companies – content providers, telecoms and video on-demand

Platform	Parent Company	Location of Owner	Revenue (£m)
Content providers (PSB & Subscription)			
BT	BT Group	UK	£20,669
Sky (inc. Now TV)	Comcast	USA	£14,051
BBC	BBC Group	UK	£5,725
ITV	ITC Plc	UK	£3,728
Channel 4	Channel Four Television	UK	£1,142
Channel 5	Paramount Global ³⁸	USA	£309
Telecoms			
Virgin Media O2	Liberty Global & Telefonica	USA & ES	£10,381
Vodafone	Vodafone Group Plc	UK	£5,687
Three	CK Hutchinson Holdings	HK/KY	£2,520
<i>Vodafone & Three</i>	<i>proposed merger</i>	<i>UK & HK/KY</i>	<i>£8,207</i>
TalkTalk	Tosca IOM Ltd	UK	£1,455
Video on Demand (SVoD and TVoD)			
Prime Video	Amazon Inc	USA	£402,429
Apple TV	Apple Inc	USA	£303,427
YouTube	Alphabet Inc	USA	£221,450
Disney+	Disney	USA	£66,094
Netflix	Netflix Inc	USA	£24,753

Source: Company accounts

38. The Channel 5 revenue figure listed here is based on accounts from 2021. Paramount Global has not released segmented financial reporting for its Channel 5 business since that time – the parent company's global revenue for the 2022 financial year was £23.6bn (\$30.2bn).

Figure 3 compares the network viewing share of terrestrial television broadcasters in the UK, using BARB data for July 2023. The BBC leads with 31.5%, followed by ITV with 21.4%. 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. However, when BARB figures for SVoD, AVoD and video-sharing services are included (Figure 4), the BBC's share of viewing falls to 19.7%. Netflix attracted a higher share of viewing than Sky/NBC Universal channels, Channel 4 and Channel 5, while total video-sharing amounted for the largest proportion of all identified viewing.

Figure 3. TV network monthly viewing share - % all individuals (July 2023)³⁹

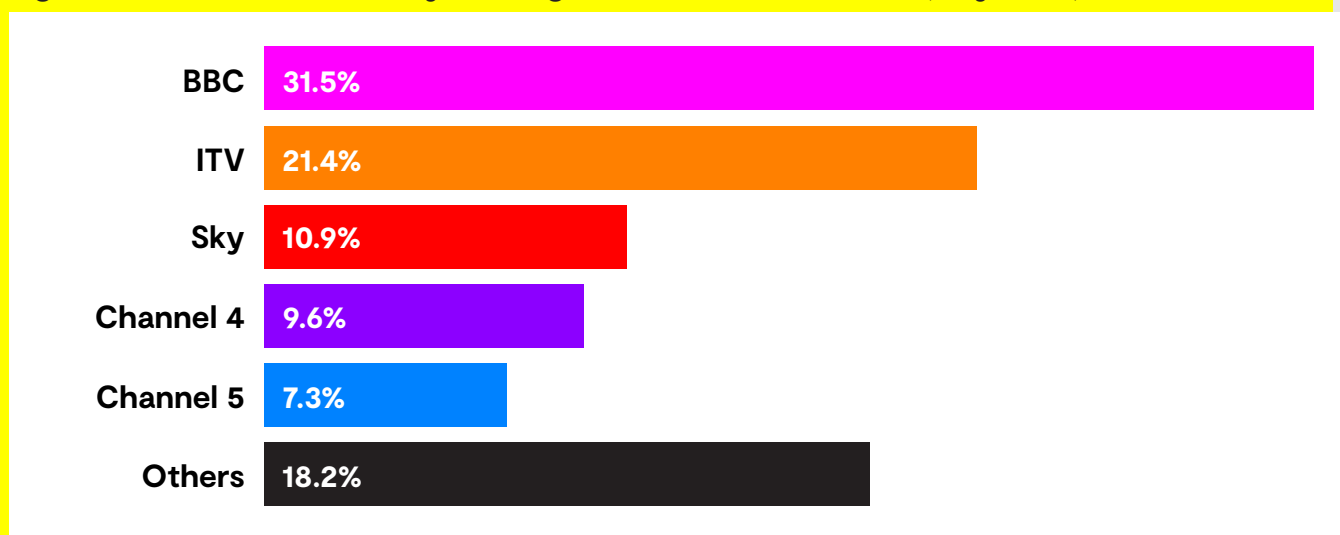
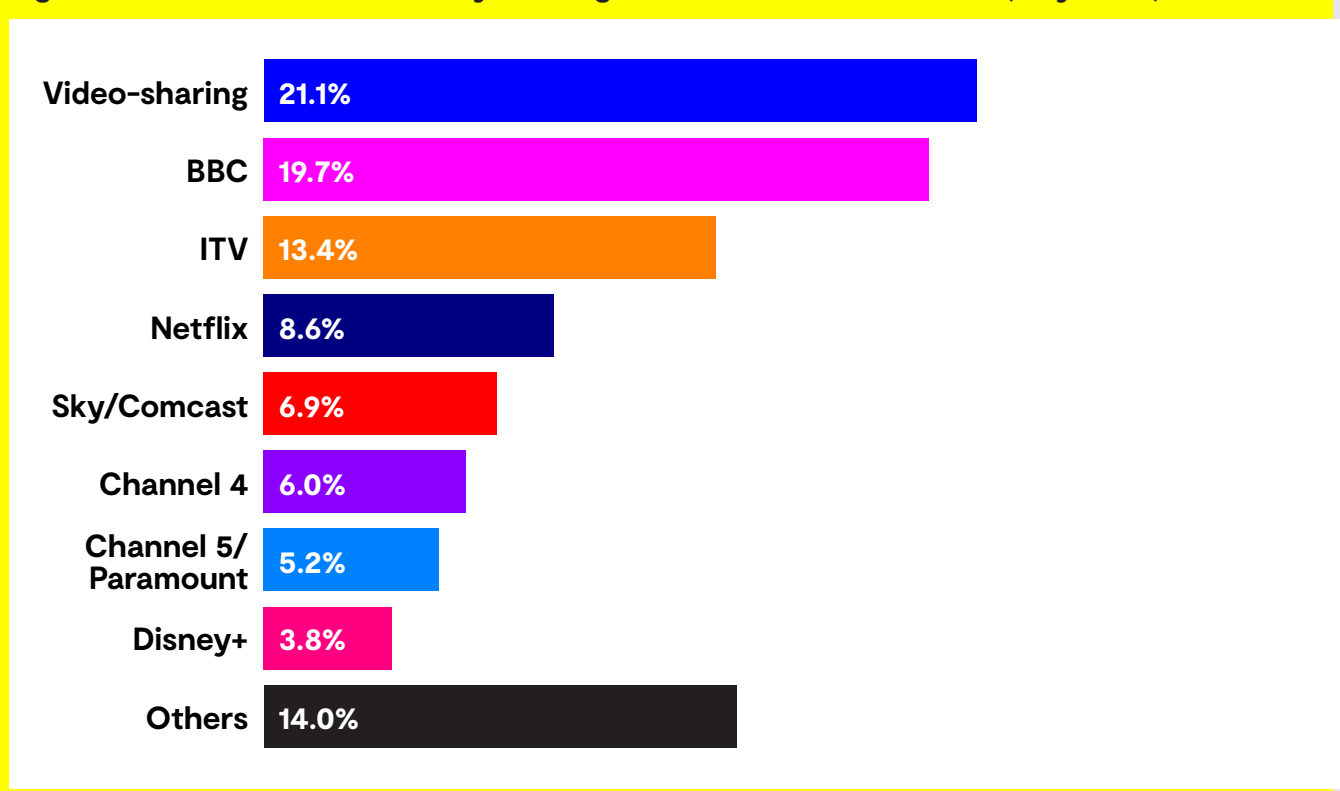


Figure 4. Total identified monthly viewing share⁴⁰ - % all individuals (July 2023)⁴¹



Source: BARB

39. [BARB monthly viewing by channel/service](#), July 2023. Others include Discovery, UKTV, BT Sport etc.

40. BARB defines its [total identified viewing figures](#) as including total broadcaster viewing together with SVoD, AVoD and video-sharing platform viewing.

41. [BARB monthly viewing summary](#), July 2023.

Table 12 shows the number of UK households subscribed to each of the main Subscription Video on Demand (SVoD) providers. In the second quarter of 2023 there were over 40 million total subscriptions to these SVoDs, one-third more than 2021 and more than triple the number of subscriptions to ‘traditional’ pay-TV services like Sky and Virgin Media. Netflix, Amazon and Disney+ account for 81% of all SVoD subscriptions in the UK, and almost nine out of 10 households that use at least one SVoD are subscribed to Netflix.

Table 12. UK SVoD Subscribers (Q2, 2023)

Platform	Households (m)	% of households with any subscription	Share of combined subscriptions
Netflix	16.1	87.2%	37.6%
Amazon Prime Video	12.1	65.6%	28.3%
Disney+	6.7	36.4%	15.7%
Now TV	1.8	9.8%	4.2%
Apple TV+	1.6	8.5%	3.7%
Paramount+	1.5	8.0%	3.5%
Xbox Live	1.4	7.5%	3.3%
Discovery	1.2	6.3%	2.7%
BritBox	0.3	1.5%	0.6%
HayU	0.2	1.0%	0.4%
Total (at least one)	18.5m		
Combined subscriptions	42.8m		

Source: BARB

Table 13 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 140 more local or regional stations – an increase of 30% since 2021.

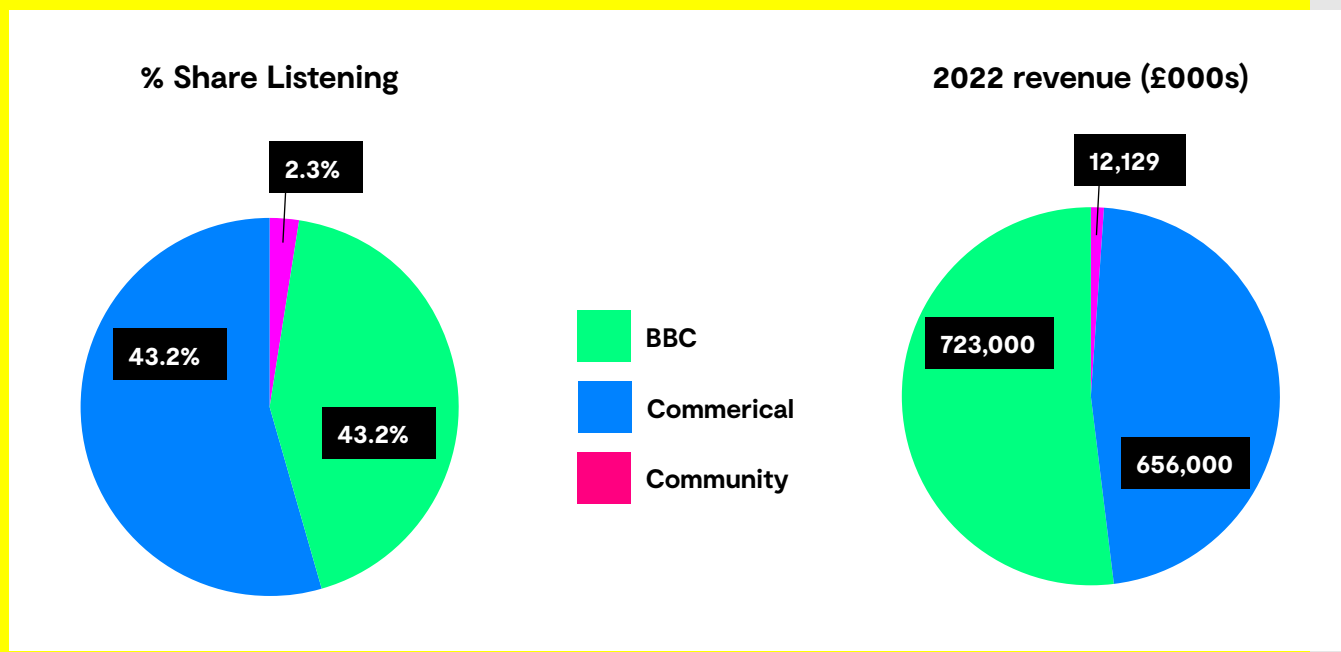
Table 13. BBC and commercial radio – UK-wide and local/regional services (August 2023)

Radio provision	BBC	Commercial
UK-wide analogue stations	5	3
Local/regional analogue	46	270
UK-wide DAB stations	11	44
Local/regional DAB	50	606

Source: Ofcom / www.ukdigitalradio.com

Although the BBC provides the majority of UK radio expenditure, its total spend has fallen over successive years: from £744 million in 2018 to £723 million in 2022. Over the same period, commercial revenue rose from £590 million to £656 million. In the second quarter of 2023 the BBC attracted a smaller share of listening than the commercial sector, and its weekly reach amongst adults is 31.6 million (56%) compared with 39.1 million (70%) for commercial radio.

Figure 5. BBC vs commercial radio – audience and revenue shares⁴²



42. Share of listening (Adults 15+): RAJAR, quarter ending June 2023. Revenue figures taken from [Ofcom Communications Market Report 2023](#).

UK radio stations – analogue

The UK has eight national and 318 local radio stations operating on analogue licences. The BBC provides five national stations and three are operated by commercial companies: Absolute Radio (owned by Bauer); Classic FM (Global Radio); and TalkSPORT (Wireless Group, owned by News UK). The BBC still operates 46 local analogue services, while commercial provision is broadly unchanged since 2021.

Table 14. Local commercial analogue radio licences in the UK (August 2023)

Owner	Number of stations	Share of total
Bauer Radio	96	35.3%
Global Radio	80	29.4%
Independent	28	10.3%
Nation Broadcasting	17	6.3%
Communicorp	12	4.4%
Northern Media Group	7	2.6%
KM Group	7	2.6%
Total Sense Media	5	1.8%
Lyca	3	1.1%
Murfin Media	3	1.1%
DC Thomson	4	1.5%
Tindle Press Holdings	2	0.7%
Sunrise Radio Group	2	0.7%
ARI	2	0.7%
Adventure Radio	2	0.7%
Like Media Group	1	0.4%
Wireless Group (Wireless Group, owned by publishers News UK)	1	0.4%
Total	272	100%

Source: Ofcom / www.ukdigitalradio.com

Bauer and Global together control 65% of the local commercial analogue market, and both companies have continued with closing down, cutting and consolidating local programming under homogenous nationwide services.⁴³ Global is currently planning to “restructure” its local news rooms, potentially resulting in 40 job losses and news programming being produced from regional ‘hubs’ – with stories about the north-east of England broadcast from studios in Glasgow.⁴⁴ Since 2022 the BBC has also proceeded with extensive cuts to and closures across its local radio network, resulting in 48 local job losses and many areas losing dedicated local programming.⁴⁵

43. Complete Music Update, ‘[Bauer to network more programmes to five local stations](#)’, 25 April 2022; RadioToday, ‘[Greatest Hits Radio South Wales to lose breakfast and daytime shows](#)’, 12 January 2023

44. iNews, ‘[Global Radio cuts leave 40 jobs at risk with Newcastle local news to be broadcast from Glasgow](#)’, 19 July 2023.

45. Guardian, ‘[BBC confirms it will cut 48 jobs in local radio overhaul](#)’, 31 October 2022; BBC (2023) [BBC moves forward with plans to modernise local services](#), 18 January 2023.

UK radio stations – digital

The BBC operates 11 UK-wide DAB stations while commercial broadcasters run 44 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 (17 stations), Bauer (10) and Wireless Group (7) — control more than three-quarters of the nationwide DAB market, and Global alone holds an almost 40% share of the sector.

Table 15. National commercial DAB radio ownership (August 2023)

Owner	Number of stations	Share of total
Global Radio	17	38.6%
Bauer Radio	10	22.7%
Wireless Group	7	15.9%
<i>Others</i>	<i>10</i>	<i>22.7%</i>
Independent	3	6.8%
Premier Christian Media Trust	2	4.5%
United Christian Broadcasters	2	4.5%
British Forces	1	2.3%
Children's Radio UK Ltd	1	2.3%
Lyca	1	2.3%
Total	43	100%

Source: Ofcom / www.ukdigitalradio.com

Podcasting

RAJAR estimates suggest that as many as 12.8 million people in the UK listen to podcasts, an increase of 2.6 million since 2020 and a doubling in podcast listeners since 2018.⁴⁶ Research by Populus for Ofcom in March 2023 details the most common sources used to access podcasts, the data for which is replicated in Table 16. BBC Sounds, the BBC's audio streaming service, is used by 46% of podcast listeners, slightly ahead of Spotify. Three of the top five podcasting services – YouTube, Apple Podcasts and Amazon Music – are owned and operated by three US-based tech giants that dominate vital parts of the digital media infrastructure.

Table 16. Podcast use in the UK (March 2023)⁴⁷

Podcast Sources	Proportion of podcast listeners	Change since 2020
BBC Sounds	46%	+8%
Spotify	43%	+6%
YouTube	35%	+5%
Apple Podcasts/iTunes	26%	-12%
Amazon Music	17%	-
Google Podcasts	13%	+1%
Audible (Amazon)	9%	-
Globalplayer	9%	+5%
TuneIn	8%	-
RadioPlayer	8%	+2%
Soundcloud	6%	-3%
Newspaper site/app	5%	-2%
Castbox	3%	-2%

Source: Populus/Ofcom

46. [RAJAR/MIDAS report, Spring 2023](#) (pg. 6). Total podcast listeners figure is projected based on the proportional weekly reach of podcasts between 2020 and 2022.

47. [Populus/Ofcom Podcast Survey April 2023](#) (data table 220, Q19). 2020 figures for Amazon Music, Audible and TuneIn were not included in previous Ofcom surveys

The levels of concentration revealed in this report demonstrate that we need action to challenge corporate media juggernauts and global tech giants, and to break down the political and market influence that flows from their dominance of central parts of the media landscape.

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 Meta and Alphabet, 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 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 both addresses the enduring (and in many ways intensifying) grip of legacy media on public debate and tackles the growing control over news and information wielded by tech giants.

As revenues across traditional print and broadcast formats continue to fall, we need to ensure that any future public funds for news and media content are allocated democratically and promote effective, independent, public interest reporting. The UK public cannot afford more subsidies to prop up the same dominant corporates that are responsible for cutting investment in local and regional news services over the last 20 years.

Meanwhile, Ofcom, the communications regulator, continues to labour under the assumption that the status quo of media plurality in the UK is acceptable. The evidence in this report shows that 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 into fewer and 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 widening economic inequalities, we urgently need a programme of genuinely progressive reform aimed at creating a freer, fairer and more accountable media. And if we want to lay the foundations for a media system that serves and 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.

As an election year looms, which political party will be brave enough put genuine democratic media reform at the heart of its manifesto?

For inquiries, please email: info@mediareform.org.uk
or please visit the [Goldsmiths Leverhulme Media Research Centre](#) to see the full datasets used in this report

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