WHO OWNS THE UK MEDIA?

2025 REPORT

MEDIA REFORM COALITION

Key findings at a glance

Seven of the top 15 online platforms used to access news in the UK are controlled by Meta, Google and X Corp.

Google commands 93% of UK search engine use, while Meta and Google together account for three-fifths of all UK advertising spend, giving these two Big Tech companies unrivalled control over how news is found, accessed and funded online.

Just three companies – DMG Media, News UK and Reach – control 90% of UK national newspaper circulation, a 20% increase in market concentration since 2014.

These same three companies account for over 40% of the combined reach of the UK's top 50 online newsbrands, giving these publishers significant power to set and steer the national news agenda.

The UK's local newspapers are dominated by a tiny handful of corporate chain publishers, with just two companies – Newquest and National World – controlling 51% of the UK's 882 local newspapers and online local news websites.

More than eight out of ten Local Democracy Reporters, funded by the TV licence fee to restore local journalism, are contracted to Newsquest, Reach and National World – and these same companies control local newspaper monopolies in areas covering 11.6 million people.

In commercial radio, just two companies – Bauer and Global – own two-thirds of the UK's national DAB radio stations, and more than 60% of local analogue stations

Bauer, Global and News Broadcasting (owned by publishers News UK) together control more than three-quarters of the UK's national DAB radio market.

Netflix, Amazon Prime and Disney+ account for 75% of all UK video-on-demand subscriptions.

Almost half of the value of TV commissions by the UK's major broadcasters went to just 12 companies, despite these largest producers making up only 4% of the entire UK independent production sector.

UK media moguls and global 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 43% 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.

Murdoch's News UK has paid out more than £1bn in legal settlements for victims of phone hacking and press intrusion perpetrated by reporters and private detectives working for News of the World and The Sun – but the company has never been held accountable in an open court.

Paul Marshall

Co-owner and founder of GB News, as well as owner of UnHerd and the Spectator magazine, which he purchased for £100m in September 2024.

Marshall's media titles are highly influential for cementing and establishing conservative views and voices in the wider news agenda. GB News and the Spectator have regularly been found in breach of broadcasting and editorial standards by Ofcom and the press regulator IPSO.

A hedge fund manager with an individual net worth of £875m, Marshall is a major contributor to right-wing causes, and has proposed funding a new generation of journalists and commentators with backing from leading UK conservative politicians.

Elon Musk

Owner of X (formerly Twitter), Tesla and SpaceX, and currently a senior advisor to President Trump, Elon Musk's personal wealth of $382bn (approx. £287bn) makes him the richest person in the world.

X / Twitter is the UK's 5th most used source for news online. Since taking over the platform in 2022 Elon Musk has interfered in the free flow of information on the site by boosting favoured accounts, with his platforms censoring users on request of authoritarian governments, and spreading far-right conspiracy theories about the UK.

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 online content, especially news. In the UK, 56% 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 (£7.2bn in 2025) of all UK display advertising spend.

Jeff Bezos – Amazon

Founder, CEO and major shareholder in Amazon, the world's largest e-commerce and internet services company with revenues of over £500bn.

Amazon Prime is the UK's second largest streaming service, while Amazon Music, Audible and Amazon smart speakers dominate the digital audio and music markets.

Bezos' net worth is estimated at $202bn (approx. £152bn). He also owns the Washington Post (purchased in 2013 for $250m) and is alleged to have directly interfered in the paper's coverage of the 2024 US election after personal meetings with Donald Trump.

Introduction

What does it mean to have a 'free' media when the majority of online platforms, newspapers, TV channels and radio stations we use are owned by a handful of giant corporations?

Is our media truly independent if the most influential news platforms are controlled by billionaires and vested interests?

How can we stay informed about and connected to our communities when local media sources are being cut, closed and consolidated, while social media sites help spread disinformation and extremist content?

In 2014 the Media Reform Coalition published the UK's first major study on media ownership. In the decade since we have published regularly updated findings charting the worsening state of concentrated ownership and corporate consolidation across the UK's national and local newspapers, broadcasters and tech platforms. This report is the 8th edition of Who Owns the UK Media? and it shows that our media system is in an increasingly perilous state due to the ongoing collapse in media plurality and the declining diversity of news sources.

Since our last report in 2023, the largest media companies have cemented and expanded their dominant market positions. The opaque and unaccountable influence that a few Big Tech platforms exert on UK media poses serious challenges for independent journalism and our digital rights, not least because of these companies' control over most online infrastructure. Following the 2024 US election, Meta abandoned its content moderation and fact-checking processes and removed restrictions on discriminatory or hateful content, tacitly linking these changes to the Trump administration repealing public interest regulations and anti-discrimination initiatives.[1] Elon Musk, the billionaire owner of X / Twitter, has used his active role in the Trump administration to benefit his own corporate interests while attacking public media initiatives, most recently by calling for the defunding of the Public Broadcasting Service (PBS) and National Public Radio (NPR).[2] Two separate US court judgements have ruled that Google's market position in online search and digital advertising constitute illegal monopolies, while the UK's Competitions and Markets Authority is also investigating whether Google's market dominance in the UK requires interventions to remedy its harms on UK consumers and news publishers.[3]

Unchecked media mergers and corporate takeovers have contributed to the worsening concentration of media ownership in the UK. The proposed purchase of Telegraph Media Group by a UAE-backed consortium prompted Parliament to introduce a foreign media ownership

[1] Meta statement, 'More Speech and Fewer Mistakes', 7 January 2025.

[2] Guardian, 'Elon Musk's conflicts of interest should scare every American, experts say', 27 February 2025; NPR, 'We can't answer audience questions about #DefundNPR without talking about the largest implications for public media', 27 February 2025.

[3] Courtney Radsch for The Guardian, 'Google broke the law. It's time to break up the company', 24 April 2025; CMA SMS investigation into Google's general search and search advertising services.

ban.[4] However, in rightly tackling the dangers of government control of media, policymakers ignored the long-standing patterns of editorial interference, declining editorial standards and abuses of media power by current UK media moguls. Subsequent mergers have exposed the consequences of these double standards over who or what is considered a legitimate media owner, such as Paul Marshall's 2024 purchase of the Spectator magazine, despite GB News' persistent violation of broadcasting and editorial standards, in breach of its broadcasting licence. The May 2024 takeover of TV production super-indie All3Media by RedBird IMI – the same UAE-backed consortium that sought to purchase the Telegraph titles – has similarly escaped regulatory or political concern, despite All3Media already holding an outsized share of UK TV commissions in the independent production sector.[5] Other major UK media interests have been acquired or consolidated with little regard for their impact on the public, with the full acquisition of the UK's second largest local publisher National World by Media Concierge, Guardian Media Group's sale of The Observer to Tortoise Media, and the imminent completion of the Vodafone/Three telecoms merger.[6]

Wider trends in media policy also risk exacerbating the effects of high ownership concentration and excessive market power held by the UK's dominant media groups. The UK government is planning to relax the ban on foreign state ownership of newspapers, exposing its total lack of understanding about how powerful interests – whether authoritarian states or corporate investors – can restrict editorial autonomy and interference in journalists' free expression through controlling even modest shares in media outlets.[7] Worse still, the decision to scrap these protections against antidemocratic influence appears to have been directly influenced by back-room lobbying from Lord Rothermere's DMG Media and Rupert Murdoch's News UK. Changes introduced by the Media Act 2024 will worsen concentration in the independent production sector, proven by Channel 4's recent lurch into producing its own content at the expense of commissions for smaller companies.[8] With almost 300 local newspapers shut down since 2005, the collapse of the UK's local media continues to deprive areas across the UK of journalism made in and about their communities. The Lebedev Foundation (publishers of the *i* newspaper) ended the London Evening Standard's historic run as a daily print newspaper by changing it to a weekly edition, and also surrendered ownership of the London TV local licence to local publishing giant National World. The government has delayed plans for 'anti-SLAPP' legislation, which would have curbed the ability of powerful corporate interests' ability to silence legitimate journalistic inquiry with vexatious legal threats and lawsuits.[9] The UK media's systematic failures to report accurately and truthfully on Israel's assault on Gaza, including by ignoring or whitewashing widespread evidence of genocide and war crimes, is arguably the most damning example of the consequences of a media landscape dominated by a handful of dominant corporations.[10]

The findings in this report, together with our Media Manifesto,[11] demonstrate the urgent need for radical media reform. Government, regulators and Parliament must act to break up the corporate media giants and unaccountable tech platforms that dominate the UK, to protect against further losses in media plurality and diversity, and to create new models for funding and supporting a genuinely independent, accountable and democratic media commons.

[4] Digital Markets, Competition and Consumers Act 2024, Section 130.

[5] Televisual, 'RedBird IMI completes acquisition of All3Media', 16 May 2024.

[6] See NUJ response to Media Concierge takeover of National World; Byline Times, 'Tortoise and the Heir', 18 December 2024; Unite the Union, 'The Three-Vodafone Merger: Myths and Reality'.

[7] The Guardian, 'Decision on foreign state stakes in UK press could end Telegraph limbo', 15 May 2025.

[8] Channel 4, 'Channel 4 unveils twin-track approach to IP ownership with move to in-house production and launch of Creative Investment Fund', 21 May 2025.

[9] The Law Society, 'Government rules out immediate anti-SLAPP legislation', 21 November 2024.

[10] See Centre for Media Monitoring, Media Bias on Gaza 2023-24, March 2024; Owen Jones / Drop Site News, The BBC's Civil War over Gaza, 19 December 2024; Hamza Yusuf, 'Israel is continuing the genocide – but the UK media will not tell you', 12 March 2015.

[11] Media Reform Coalition, Media Manifesto 2024.

Big Tech, online platforms and UK news

Digital technologies and online platforms play a dominant role in how the British public find, access and consume all kinds of media content. UK adults spend an average of 4 hours and 20 minutes online every day, and more than half of this is spent on services owned and controlled by a small number of global Big Tech corporations.[1] Online services owned by **Alphabet** (such as Google and YouTube) were visited by 99% of UK online audiences in 2023, while 95% used **Meta** services (including Facebook, Instagram and WhatsApp). The revenues of these predominantly US-based companies also highlight their dominance of global IT and digital tech markets. Alphabet (£277bn), Microsoft (£194bn) and Meta (£101bn) generate annual turnovers that are exponentially larger than any UK media company.[2]

99% of UK online audiences visit services controlled by Alphabet, owners of Google and YouTube

71% use online sources as a main platform for accessing news, more than TV, radio and newspapers

7 out of 15 top online news sources in the UK owned by Meta, Alphabet and X Corp

The near-total control that these Big Tech companies hold over our shared online spaces is further reflected in how the UK public accesses news. 71% of UK adults use online sources such as social media, podcasts and messaging apps for their everyday news consumption, compared to 66% for television, 40% for radio and 22% for newspapers. A larger UK audience gets news from social media specifically (51%) than radio or newspapers (rising to 82% for 16-24 year-olds), and 2024 was the first year that online sources were used to access news by a larger audience than those getting news from UK broadcasters.[3]

[1] Ofcom 'Online Nation 2024', pg. 22.

[2] Companies' latest financial statements from 401-K filings.

[3] Ofcom 'News consumption in the UK 2024', pg. 5 & survey question C1 (main platforms used for news nowadays).

However, the widespread use of online platforms has not led to a greater diversity in the way that UK audiences can find and access news. As detailed in Table 1, seven of the top 15 websites, apps and online platforms used to access news are controlled by just three Big Tech companies – **Meta**, **Alphabet** and **X Corp** (owners of X / Twitter). The power of these companies as 'online intermediaries', shaping the distribution and prominence of news and information online, is stronger than ever, with the share of the UK's online audiences using Facebook (from 33% to 42%) and YouTube (from 21% to 26%) for news rising since 2022. 77% of UK online news audiences use services owned and controlled by **Meta** to access news, compared to 66% using the **BBC**'s news website, app or iPlayer.[4]

Table 1: Top 15 online sources used for news nowadays, 2024

News source	Company	% of online audiences	Total UK news users
Facebook	Meta	42.6%	20,649,611
BBC websites or apps	BBC	29.6%	14,366,746
YouTube	Alphabet	26.5%	12,832,643
Instagram	Meta	25.5%	12,378,970
X / Twitter	X Corp	21.1%	10,247,289
WhatsApp	Meta	20.4%	9,904,384
Google Search	Alphabet	19.7%	9,527,724
TikTok	ByteDance	16.1%	7,789,465
ITV/STV websites or apps	ITV	10.8%	5,255,924
Sky News online	Comcast	8.9%	4,319,572
The Guardian/Observer online	Guardian Media Group*	8.9%	4,305,202
Channel 4 websites or apps	Channel 4	8.5%	4,129,716
Snapchat	Snap Inc.	8.4%	4,073,728
The Daily Mail news online	DMG Media	8.3%	4,015,669
Google News site or app	Alphabet	8.1%	3,932,130

Source: Ofcom[5]

The significant market control that these Big Tech companies hold over the distribution of UK news is also evidenced by their high levels of cross-platform news consumption against other UK news sources (Figure 1). Across all news providers used by the UK public, platforms and services owned by **Meta** (40%) and **Google** (32%) have a higher reach than all 'traditional' news publishers and most UK broadcasters except for news outlets owned by the **BBC** (68%) and **ITV** (38%).

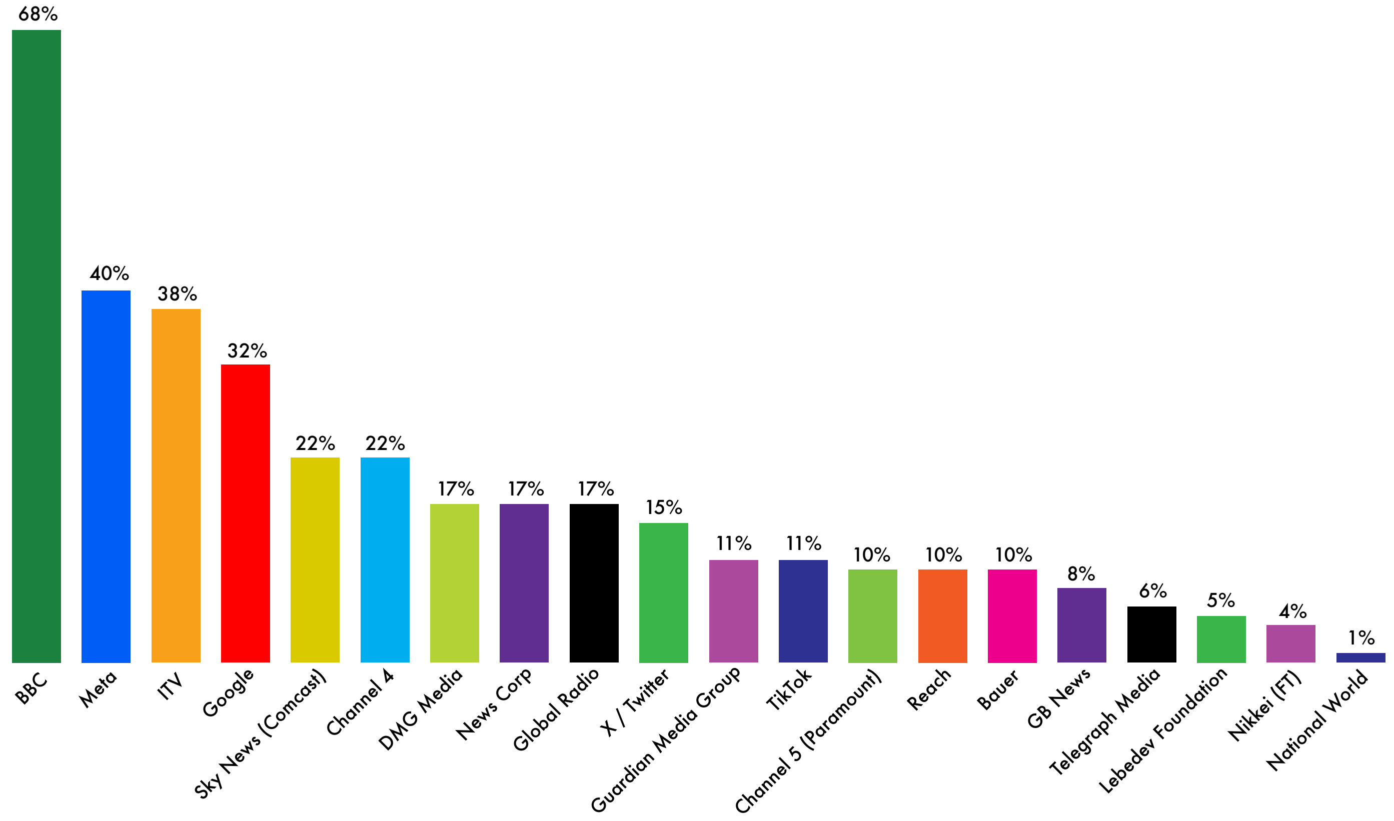
Although these Big Tech companies do not produce news, their online platforms are not 'neutral' services that enable all news providers to reach audiences and monetise news content on an equal footing. Rather than enhancing news media diversity, these platforms instead reflect and entrench existing patterns of concentrated ownership, benefitting the market position and agenda-setting power of the largest broadcasters and newspaper publishers that already dominate the wider UK news media landscape.

[4] Ofcom, ibid., MRC analysis of survey questions D8a, D7a and D8aaa (platforms used for news nowadays across 'other internet', social media sites and search engines/news aggregators.

[5] Ofcom 'News consumption in the UK 2024', survey question D2a-D8a (cross-platform retail providers used for news nowadays). Total UK news users calculated from UK population using any internet sources for news (71%) and ONS figures of UK population (mid-year 2023).

* Survey conducted prior to Tortoise Media acquisition of The Observer from Guardian Media Group.

Figure 1: Cross-platform retail providers of UK news, 2024



Source: Ofcom[6]

Table 2: Top 15 newsbrands in the UK, March 2025

Newsbrand	Company	Audience (m)	Reach %
BBC	BBC	39.1	77%
Mail Online	DMG Media	21.2	41%
The Guardian	Guardian	21.1	40%
The Sun	News UK	20.6	40%
The Independent	Lebedev	19.3	36%
Yahoo!	Others	18.9	34%
Mirror	Reach Plc	18.5	36%
Sky News	Comcast	17.1	33%
Daily Express	Reach Plc	16.6	31%
The Telegraph	Telegraph	15.9	29%
Money Saving Expert	Others	15.2	28%
Metro	DMG Media	15.1	28%
ITV	ITV	14.2	29%
Good Food	Others	13.1	23%
Manchester Evening News	Reach Plc	12.3	24%

Source: Ipsos iris / Press Gazette[7]

[6] Ofcom 'News consumption in the UK 2024', survey question D2a-D8a (cross-platform retail providers used for news nowadays).

[7] Press Gazette, '50 biggest UK news websites', February 2025.

The opaque processes that Big Tech platforms use to curate, distribute and display content from news organisations – large or small, corporate or independent, national or local – have a significant impact on the range and diversity of news that audiences encounter online. Platform features such as automated content recommendations, aggregation and (more recently) AI-generated news summaries give excessive power to these platforms to decide what news their users see, and are further exacerbating the UK's crises of media market concentration and low diversity in news.[8]

65% of social media users get news from platforms' recommended or trending stories[9]	**2/3rds** reduction in news website traffic referral from Facebook, 2023-24[10]	**51%** of AI-generated news summaries found to be false, inaccurate or fake[11]

Table 2 above details the top 15 online 'newsbrands' in the UK in March 2025, showing how the news outlets that already lead their respective markets (see subsequent sections) hold significant online reach amongst UK audiences, despite the online news landscape comprising many thousands of other outlets and tens of millions of individual users.

Table 3 details how UK social media users access news on Facebook, Instagram, X / Twitter, TikTok and Snapchat. Averaged across the five sites, 65% of users get news via the stories that these platforms show as trending or recommended, while just 35% get news from actively following 'traditional' news providers. The largest platforms have significantly reduced the prominence of news content, causing a huge decline in traffic referrals to news organisations from Facebook (down 67% since 2022) and X / Twitter (down 50%) – with serious consequences for smaller and independent titles who depend on platform traffic for readers and revenues.[12]

The growing prominence of AI-generated news summaries on tech platforms' search, social and aggregator sites – particularly on Google Search – further reduces users' control over their access to news. These technologies also risk diminishing the accuracy and truthfulness of news content that users find online, with recent BBC research finding that more than half of AI-generated news summaries contained false, inaccurate or entirely fake information.[13]

Table 3: Accessing news on social media (% of UK platform users), 2024

	Facebook	Instagram	X / Twitter	TikTok	Snapchat
Stories that [platform] says are trending	64%	65%	69%	70%	56%
Comments from friends & family	59%	42%	38%	32%	37%
Links to news content from people I follow	36%	37%	37%	27%	30%
Following traditional news providers	32%	35%	42%	32%	32%

Source: Ofcom[14]

[8] See Nechushtai and Lewis (2019) What kind of news gatekeepers do we want machines to be? Filter bubbles, fragmentation, the normative dimensions of algorithmic recommendations, in Computers in Human Behaviour 90.

[9] Ofcom 'News consumption in the UK' report 2024, survey question D9 (news related activities on major platforms), average across Facebook, Instagram, Twitter / X, TikTok and Snapchat.

[10] Reuters Institute for the Study of Journalism, 'Journalism, media, and technology trends and predictions 2025', January 2025.

[11] BBC 'Representation of BBC News content in AI assistants', October 2024.

[12] Reuters Institute, 'Journalism, media, and technology trends and predictions 2025', January 2025.

[13] BBC 'Representation of BBC News content in AI assistants', October 2024.

[14] Ofcom 'News consumption in the UK' report 2024, survey question D9 (news activities on social media platforms).

Table 4: Top 15 news organisations followed on social media (% of UK platform users), 2024

Facebook		Instagram		Twitter / X		TikTok		Snapchat	
Sky News	19%	Sky News	22%	BBC	28%	Sky News	18%	Sky News	21%
BBC	17%	BBC	20%	Sky News	25%	BBC	17%	CNN	14%
LAD Bible	12%	Public figures	13%	Public figures	19%	CNN	12%	The Daily Mail	12%
YouTube	11%	LAD Bible	12%	Specific journalists	15%	LAD Bible	9%	Aggregators e.g. NewsNow	12%
The Daily Mail	10%	CNN	12%	Guardian/Observer	14%	Channel 4	9%	The Sun	10%
The Sun	9%	BuzzFeed	9%	CNN	11%	ITV	9%	CBS News	9%
ITV	8%	ITV	9%	The Daily Mail	10%	Public figures	8%	YouTube	9%
CNN	8%	Channel 4	8%	ITV	9%	YouTube	8%	Buzzfeed	9%
Public figures	8%	The Sun	8%	Channel 4	9%	NBC News	6%	LAD Bible	8%
Guardian/Observer	7%	Specific journalists	8%	Lad Bible	7%	CBS News	6%	Specific journalists	7%
BuzzFeed	7%	YouTube	8%	The Sun	7%	The Daily Mail	6%	Public figures	7%
Any local newspaper	7%	Guardian/ Observer	7%	Financial Times	7%	BuzzFeed	6%	Guardian/ Observer	6%
Channel 4	6%	The Daily Mail	7%	YouTube	6%	The Sun	5%	NBC News	6%
The Metro	5%	NBC News	6%	BuzzFeed	6%	Specific journalists	5%	The Metro	5%
The Independent	5%	Vice	5%	Joe.co.uk	6%	The Metro	5%	The Daily Star	5%

Source: Ofcom[15]

News organisations are increasingly dependent on online advertising as a major revenue source, but online advertising services remain dominated by **Alphabet**'s Google and **Meta**, with each holding majority control over search and online display respectively.

Table 5 calculates the two companies' value and share of UK expenditure on advertising. In the last five years total spend on advertising in the UK has increased by 60% but spend on 'traditional' forms of advertising has continued to fall following the market slump caused by the Covid-19 pandemic. As a result, online advertising is responsible for the vast majority of all UK ad spend, rising from £14,295m (56%) in 2020 to a forecast £31,547m (78%) in 2025.

Three-fifths
of all UK advertising spend goes to services owned by Meta and Alphabet

In 2020, the CMA estimated that Google's search services account for 90% of all UK search advertising spend, while Meta accounts for half of all display advertising spend. Applied to the most recent UK advertising industry reports, this would mean that Meta and Google services together receive three-fifths of all UK advertising spend (59%) and command a three-quarters share of UK spend on online advertising (76%).

Meta and Alphabet's dominance of online advertising poses a severe threat to media plurality, fair competition and sustainable funding for UK news, especially as publisher revenues continue to fall due to the decline in spending on print newspaper advertising.

[15] Ibid., survey question D12a (news sources followed on social media)

Table 6 provides MRC estimates of UK newspaper industry revenues by revenue source since 2023. While print circulation and revenues from print advertising have continued to decline since our 2023 media ownership report, digital advertising revenues have increased from 15% of total revenues in 2019 to 40% in 2025. Publishing companies, new online news outlets and independent journalists alike are 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 5: UK expenditure on online advertising, 2023-2025

Expense	2023	2024 (est.)	2025 (forecast)
Total UK advertising spend	**£36,624m**	**£38,760m**	**£40,504m**
Search & online display advertising spend	**£27,630m**	**£29,766m**	**£31,547m**
Online advertising as % of total	**75%**	**77%**	**78%**
Search advertising	**£14,705m**	**£16,014m**	**£17,039m**
to Google	£13,235m	£14,412m	£15,335m
to others	£1,471m	£1,601m	£1,704m
Online display advertising	**£12,925m**	**£13,752m**	**£14,509m**
to Meta	£6,463m	£6,876m	£7,254m
to Google	£1,293m	£1,375m	£1,451m
to others	£5,170m	£5,501m	£5,803m
Meta + Google, UK ad revenue	**£20,990m**	**£22,664m**	**£24,040m**
Meta + Google, UK advertising share	**57%**	**58%**	**59%**
Meta + Google, UK online advertising share	**76%**	**76%**	**76%**

Source: MRC analysis, AA/WARC data and CMA[16]

Table 6: UK newspaper industry revenues by source, 2023-2025 (est.)

Source	2023	2024	2025
Print circulation	£1,191m	£1,142m	£1,096m
Digital subscriptions	£467m	£492m	£518m
Print advertising	£1,674m	£1,585m	£1,524m
Digital advertising	£957m	£991m	£1,002m
Digital % of total	35.7%	38.5%	39.7%

Source: MRC projections based on Ofcom & industry data

[16] Advertising Association / WARC UK advertising expenditure report, 2023; Google and Meta advertising market shares calculated from Competition and Markets Authority estimates, Online platforms and digital advertising market study 2020.

National newspapers

Market share by print circulation

Ownership of the UK's national newspaper market is highly concentrated, and over time this concentration has deepened in favour of a small handful of dominant companies.

In 2014, when the Media Reform Coalition published our first UK media ownership report, the UK's three largest national newspaper publishers – **News UK**, **DMG Media** and **Trinity Mirror** (predecessor company to **Reach Plc**) – held a combined market share of 70.6%.

In 2024 the same three dominant publishers – **DMG Media** (publishers of the Daily Mail, Metro and *i* titles), **News UK** (The Sun, The Times and The Sun on Sunday) and **Reach** (the Daily Mirror, Daily Express, Daily Star and Sunday People) – together account for 89.8% of all national newspapers sold in 2024 (Table 7). This equates to a 27% increase in market concentration over 10 years.

9 out of 10 national newspapers sold every week owned by DMG Media, News UK or Reach

The same three companies hold two-fifths of the combined online reach of the UK's 50 biggest newsbrands

27% increase in print market concentration of the three largest publishers since 2014

DMG Media alone controls more than two-fifths of combined weekly circulation, and its share has risen from 41.6% in 2023 to 43.4% in 2024 - a 5% increase in its dominant share over the national newspaper market.

While the market shares of News UK and Reach have declined by only a few percentage points over the last decade, **DMG Media**'s share of combined weekly circulation has doubled since 2014. With the ongoing possibility of DMG Media acquiring the **Telegraph Media Group** titles, the UK's national newspaper market is perilously close to being majority-controlled by a single publisher.

Table 7: Combined weekly circulation by publisher (national daily and Sunday newspapers), 2024

Publisher	Weekly circulation	Share of circulation	Cumulative share
DMG Media	10,227,055	43.36%	43.36%
News UK	7,637,631	32.38%	75.75%
Reach	3,332,577	14.13%	89.88%
Telegraph Media Group	1,156,069	4.90%	94.78%
Nikkei (The Financial Times)	656,273	2.78%	97.56%
Guardian News & Media	574,878	2.44%	100.00%
TOTAL	**23,584,483**	**100.00%**	**n/a**

Source: Audit Bureau of Circulations, MRC[1]

Table 8: Average daily print circulation (national newspapers), 2024

Publication	Average circulation	Share of circulation	Average circulation 2022	% change 2022-2024	% change 2014-2024
Metro	952,194	25.42%	1,021,687	-6.80%	-29.46%
The Sun*	846,916	22.61%	1,058,350	-19.98%	-58.56%
Daily Mail	688,972	18.39%	855,229	-19.44%	-59.34%
The Times*	281,370	7.51%	328,700	-14.40%	-28.36%
Daily Mirror	223,177	5.96%	309,663	-27.93%	-76.56%
Daily Telegraph*	174,293	4.65%	233,255	-25.28%	-66.02%
Daily Express	139,269	3.72%	199,232	-30.10%	-70.84%
The i	125,242	3.34%	140,646	-10.95%	-56.52%
Daily Star	124,896	3.33%	180,595	-30.84%	-73.14%
Financial Times	109,379	2.92%	114,924	-4.82%	-50.35%
The Guardian*	79,906	2.13%	98,755	-19.09%	-57.12%
TOTAL	**3,745,614**	**100.00%**	**4,541,034**	**-17.52%**	**-56.68%**

Source: Audit Bureau of Circulations, MRC[2]

As shown in Table 8, the national daily print newspaper market is still dominated by Metro, The Sun and the Daily Mail. Between 2022 and 2024 the average circulation of all national daily newspapers fell by 17.5%. Daily Star (-30.8%), Daily Express (-30.1%) and Daily Mirror (-27.9%) accounted for the largest declines in average circulation, contributing to **Reach**'s combined weekly circulation falling by more than a quarter in the last two years. The significantly smaller drop in circulation of Metro means that **DMG Media**'s freesheet has overtaken **News UK**'s The Sun as the UK's most read daily newspaper. Since 2014, average daily circulation of UK national newspapers has fallen by 56%.

[1] Combined weekly circulation per publisher calculated by multiplying individual daily titles' circulation by their respective number of weekday issues, added to the circulation of individual Sunday titles.

[2] Titles marked with * have withdrawn from submitting or publishing circulation figures with ABC. Average circulation figures for these titles is calculated from MRC analysis of historic circulation patterns and industry trends – see this report's accompanying online data sheets for the full methodology.

Table 9: Average weekly print circulation (national Sunday newspapers), 2024

Publication	Average weekly circulation	Share of weekly circulation	Average weekly circulation 2022	% change 2022-2024	% change 2014-2024
Mail on Sunday	580,799	28.15%	728,164	-20.24%	-62.06%
Sun on Sunday*	491,069	23.80%	681,067	-27.90%	-70.49%
Sunday Times*	376,844	18.27%	489,023	-22.94%	-53.78%
Sunday Mirror	165,011	8.00%	236,740	-30.30%	-82.11%
Sunday Express	122,590	5.94%	173,520	-29.35%	-70.76%
Sunday Telegraph*	110,312	5.35%	161,749	-31.80%	-72.77%
The Observer*	95,442	4.63%	160,327	-40.47%	-53.92%
Daily Star Sunday	67,689	3.28%	101,679	-33.43%	-76.76%
Sunday People	53,238	2.58%	85,606	-37.81%	-85.57%
TOTAL	**2,062,994**	**100.00%**	**2,817,874**	**-26.79%**	**-68.86%**

Source: Audit Bureau of Circulations, MRC[3]

Table 9 shows that sales of Sunday newspapers have also declined by a substantial amount, with total average weekly circulation falling by a quarter since 2022. **DMG Media**'s Mail on Sunday and **News UK**'s Sun on Sunday remain the most-read Sunday papers with 28% and 23% market shares respectively, while **Reach** titles the Sunday Mirror, Sunday Express and Sunday People saw heavy drops in readership. The Observer, recently purchased by **Tortoise Media**, lost two-fifths of its weekly circulation from 2022 to 2024.

Since 2022, total weekly circulation of all national newspapers (dailies and Sundays) has decreased by 5 million to 24.4 million copies (17%). Since our first media ownership report in 2014, total combined weekly circulation has fallen by 31.5 million copies (57%).

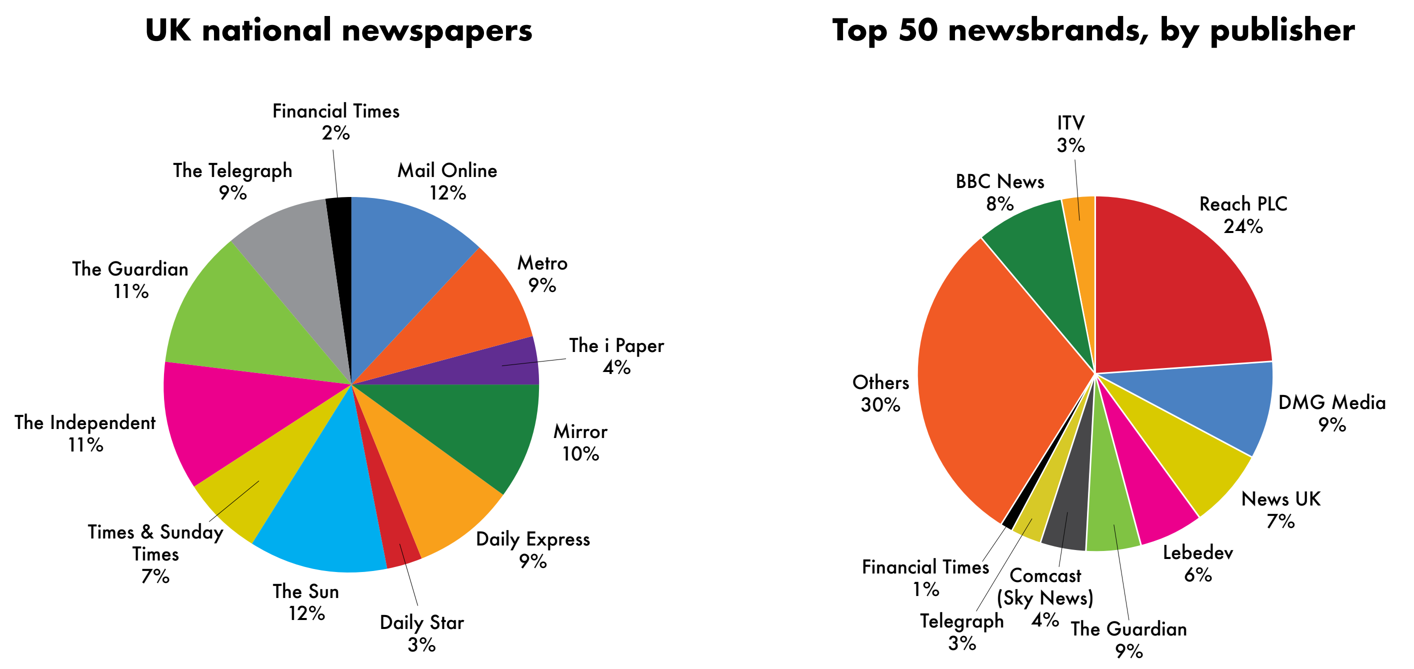
Market share by online reach

Despite the continued collapse of print circulation and print revenues across the UK's newspaper industry, the same national newspapers and publishing companies that hold controlling shares of the print market also have amongst the largest digital audience reach of any UK news outlets. In February 2025, online newsbrands owned by **DMG Media**, **Reach** and **News UK** accounted for two-thirds of the combined online reach of the major UK newspaper publishers. Across the UK's top 50 newsbrands, these same three companies command more than 40% of the combined online reach of the UK's 50 biggest newsbrands.

Although the **BBC** has the largest news audience and reach (39.1m, 77%) of any newsbrand, the next three largest newsbrands – Mail Online (21.2m, 41%), the Guardian (21.1m, 40%) and The Sun (20.6m, 40%) – are all owned by national newspaper publishers. Reach, which owns 15 of the top 50 newsbrands, controls 24% of the total combined online reach.

[3] As above.

Figure 2: Combined UK online reach of national newsbrands, March 2025



Source: Ipsos iris / Press Gazette[4]

Market share by company revenues

Table 10 shows the annual turnover of the UK's national newspaper publishers, using figures from the latest available financial statements submitted to Companies House. Revenues for most publishing companies have fallen by an average of 5.4% since 2022, while the Financial Times (owned by **Nikkei**) increased its turnover by £74m. The three largest publishing companies in terms of share of circulation each also represent more than 20% of the sector's total revenues, with **News UK** and **DMG Media** together accounting for almost half of all national publisher turnover.

Table 10: Market share by revenue (national newspaper publishers), 2023-24

Company	Turnover	Market share	Cumulative share	Accounting date
News Corp UK & Ireland Ltd	£679,750,000	24.26%	24.26%	Jun 2024
DMG Media	£613,400,000	21.90%	46.16%	Sep 2024
Reach Plc	£538,600,000	19.23%	65.39%	Dec 2024
The Financial Times Ltd	£443,904,000	15.85%	81.23%	Dec 2024
Telegraph Media Group Ltd	£268,000,000	9.57%	90.80%	Dec 2023
The Scott Trust / Guardian	£257,800,000	9.20%	100.00%	Mar 2024
TOTAL	**£2,801,454,000**	**100.00%**		

Source: Company accounts

[4] Press Gazette, '50 biggest UK news websites', March 2025.

Local newspapers

Decades of cuts, closures and corporate consolidation have left the UK's local newspaper industry, and the wider local media ecology, in a dilapidated state. Research by Press Gazette suggests that 293 local print newspapers have closed since 2005, with 22 titles closed since our last report in 2023 – including 13 regional online newsbrands mothballed by **Reach** in November that year.[1] The steady launch of new digital news outlets by companies like Mill Media or independent and hyper-local news outlets has done little to counter the wider impact of closures and reduced investment across the local news sector. Since 2007, there are over 6,000 fewer journalists employed by the three dominant local publishing companies to report in and about local communities.[2]

51% **of the UK's local newspapers owned by Newsquest, National World and Reach**

6,017 **fewer journalists employed by the three largest publishers since 2007**

Newsquest controls more local newspapers than the smallest 154 publishers combined[3]

The collapse in the UK's local media is made more precarious by the continued high levels of ownership concentration created by the same three publishing companies. Table 11 details the share of local newspaper titles owned by local news publishers, highlighting the disproportionate share of the market controlled by a small handful of the sector's 173 publishers. 71% of all local newspapers (including print and online-only titles) are owned by just nine companies. **Newsquest** (23.9%), **National World** (14.6%) and **Reach** (12.8%) each control a larger share of the local news market than the smallest 113 publishers combined, while Newsquest alone owns more titles than the smallest 154 publishers combined.

[1] Press Gazette 'UK local newspaper closures update: 293 now gone since 2005', 14 August 2024; Press Gazette 'The audience data behind Reach decision to close 13 regional newsbrands', 28 November 2023.

[2] Press Gazette 'Colossal decline in UK regional media since 2007 revealed', 15 February 2024.

[3] Combined share of smallest 154 local newspaper publishers: 23.6% from 209 titles (vs. 23.9% from 211 titles for Newsquest). The 123 smallest local newspapers publishers are single-outlet companies, with market shares of just over 1/10th of 1% each.

Table 11: Local newspaper titles by publisher, April 2025

Publisher	Titles	Share	Cumulative share
Newsquest	211	23.9%	23.9%
National World*	129	14.6%	38.5%
Reach	113	12.8%	51.4%
Nub News	55	6.2%	57.6%
Tindle Newspapers	45	5.1%	62.7%
Iliffe Media	27	3.1%	65.8%
Highland News and Media	15	1.7%	67.5%
Voice Press	11	1.2%	68.7%
Bullivant News	11	1.2%	70.0%
Alpha Newspapers	11	1.2%	71.2%
Remaining 163 publishers	254	28.8%	100.0%
TOTAL	**882**	**100%**	**n/a**

Source: Public Interest News Foundation[4]

Continued loss of local news coverage across the UK

Concentration and consolidation in local newspapers have also had a worsening effect on the diminished availability of local news and journalism across the UK's nations, regions and local communities. The largest corporate publishers have continued to fold distinct local newspapers into generic 'hub' websites providing limited (if any) news about the towns and cities they serve. Using data from the Public Interest News Foundation's Local News Map, Table 12 details the number of local news 'deserts' and 'drylands' at the Local Authority District (LAD) level across the UK. Over one-third (133) of UK LADs are served by only one newspaper or do not receive any local newspaper coverage at all – with 5.4 million people (8.1% of the national population) living in absolute news 'deserts' with no local newspaper and 12.5 million people (18.6%) living in 'drylands' with only one local newspaper.

5.4 million
people live in local newspaper 'deserts', areas without a single dedicated local newspaper

¼ of the UK
lives in a local news monopoly, with all local newspapers owned by only one single publisher

More than
8 out of 10
Local Democracy Reporters contracted to the three dominant local news publishers

Table 13 further details the number of LADs that are subject to a local newspaper monopoly - areas where all local newspapers (including 'drylands') are owned by a single publisher. 16.7 million people (24.8% of the UK) live in local newspaper monopolies, while more than 11.6 million people (17.2%) live in local newspaper monopoly areas controlled by the three largest publishers - **Newsquest** (34 LADs, 6.3m people), **National World** (25, 3.9m) and **Reach** (13, 1.3m).

[4] Local titles data supplied by PINF's UK Local News Mapping Report (April 2024), with MRC updates and analysis leading up to April 2025. Differences in publisher title counts and sector titles between PINF and previous MRC reports are a result of defined inclusion criteria for the purposes of PINF's mapping project.
* National World listed as a distinct company while the Media Concierge takeover is still pending.

Table 12: Local newspaper 'deserts' and 'drylands', April 2024

Category	LADs	% of LADs	Population	% of UK
'Deserts': no local newspaper	47	13.0%	5,475,293	8.1%
'Drylands': one local newspaper	86	23.8%	12,584,657	18.6%
'Desert' or 'dryland'	**133**	**36.8%**	**18,059,950**	**26.7%**

Source: PINF / MRC[5]

Table 13: Local newspaper publisher monopolies, April 2024

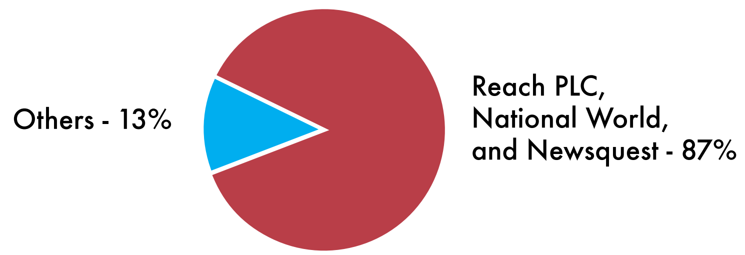
Publisher	LADs under monopoly	Combined population	% of UK
Newsquest	36	6,366,845	9.4%
National World	25	3,922,859	5.8%
Reach	13	1,340,109	2.0%
Iliffe Media	5	698,728	1.0%
Tindle	4	451,373	0.7%
Nub News	2	173,618	0.3%
Independents (one outlet)	28	3,820,271	5.7%
TOTAL	**113**	**16,773,803**	**24.8%**

Source: PINF / MRC[6]

News in their hands - Local Democracy Reporters

The BBC Local Democracy Reporting Service, which provides licence-fee funded reporters to local newspapers publishers, is intended to improve the significant decline of investment in reporting on important local matters, particularly local government and other major civic issues. However, throughout the lifetime of these scheme since 2020, the vast majority of LDRS reporters have been contracted to the three dominant commercial publishing companies, which share a large portion of responsibility for the reduction in local democracy reporting that the scheme is designed to restore. The BBC and licence fee funding is being used to subsidise for-profit publishers whose commercial choices helped to create the UK's crisis of collapsing local journalism, rather than supporting new, independent public interest outlets. Under the new LDRS contracts issued for 2025-27, 86% of reporters (143 out of 165 total LDRS) have been contracted to Reach, Newsquest and National World, a slight increase from the last contracts covering 2021-2024 (139 out of 165).

Figure 3: Share of LDRS contracted reporters by local publisher, 2025-27



Source: BBC LDRS contracts[7]

[5] PINF, UK Local News Mapping Report (April 2024). This report removes local radio outlets from PINF's desert & drought analysis to produce a distinct figure for local newspaper coverage (rather than local news media as a sector, as in PINF's reports). See accompanying online data sheets for full record of LADs by newspaper titles and owners.

[6] As above.

[7] BBC Local Democracy Reporting Service; HoldtheFrontPage.co.uk, 'Big three retain most LDR contracts as four new publishers join scheme', 8 May 2025.

Television & video-on-demand

Table 14 lists the ownership and revenues of three types of companies with primary or significant involvement in UK television, subscription broadcasting and Subscription Video-on-Demand (SVoD) markets. The first group includes the four national public service broadcasters (PSBs) together with **Sky** and **BT**. Although total pay-TV subscriptions in the UK have fallen markedly in recent years, BT and Sky – which both bundle their significant content platforms and premium sports services with dominant consumer telecoms products – still dwarf the financial positions of the PSBs. 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.

The power imbalance between UK TV companies and their global competitors has widened significantly in the decade since our first media ownership report. National public service broadcasters and subscription TV companies are at a significant disadvantage against the financial clout and market control of a few international streaming companies and dominant global production studios.

Revenues for international video-on-demand services have risen dramatically over the last 10 years, with global turnover for **Amazon**, **Alphabet** and **Netflix** more than tripling since 2014. At the same time, income for domestic broadcasters has stagnated, driven by the on-going decline in spend on TV advertising, the reduction in pay-TV subscriptions and 15 years of cuts and freezes to the **BBC**'s public income from the TV licence fee.

Table 14: Major broadcasting companies active in UK TV market, 2014

Company	Parent	Location of owner	Revenue (£m)	Revenue (£m, 2014)	Change
UK PSBs and pay-TV					
BT	BT	UK	£20,797m	£24,487m	-15%
Sky (incl. Now TV)	Comcast	USA	£10,230m	£10,220m	0%
BBC	BBC	UK	£5,389m	£6,703m	-20%
ITV	ITC	UK	£3,488m	£3,468m	1%
Channel 4	Channel Four Television	UK	£1,023m	£1,256m	-19%
Channel 5	Paramount Global	USA	£399m	£492m	-19%
Telecommunications					
Virgin Media O2	Liberty Global & Telefónica	USA & ES	£10,680m	£5,643m	89%
Vodafone	Vodafone Group	UK	£5,820m	£7,067m	-18%
Three	CK Hutchinson Holdings	HK/KY	£2,039m	£2,745m	-26%
Vodafone & Three	*ongoing merger*	UK	£7,859m	-	-
TalkTalk	Toscafund	UK	£700m	£2,313m	-70%
Video-on-demand (SVoD and TVoD)					
Prime Video	Amazon	USA	£506,693m	£93,652m	441%
Apple TV	Apple	USA	£310,576m	£135,056m	130%
YouTube	Alphabet	USA	£277,998m	£69,460m	300%
Disney+	Disney	USA	£72,563m	£51,371m	41%
Discovery	Warner Bros. Discovery	USA	£31,230m	£6,593m	374%
Netflix	Netflix Inc	USA	£30,975m	£5,357m	478%
Paramount	Paramount Global	USA	£23,202m	£9,324m	149%

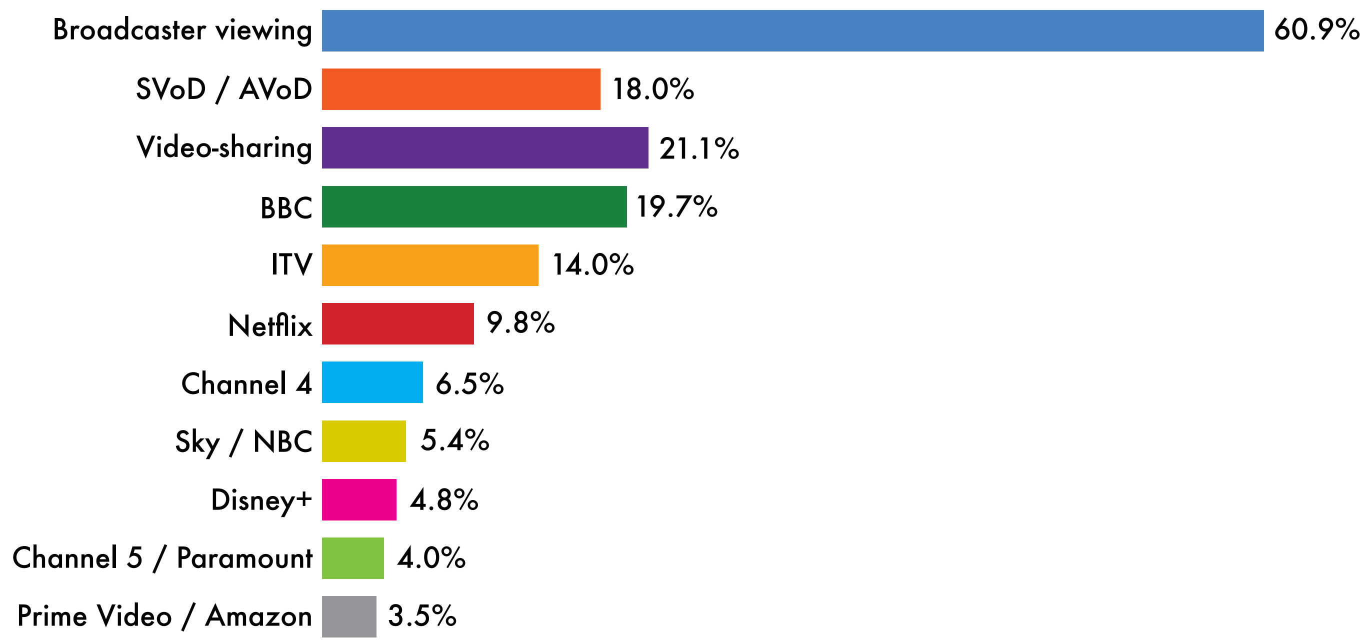
Source: Company accounts[1]

Figure 4 compares the total identified viewing share of UK TV networks and other AV content providers in the UK, using BARB data for March 2025. While broadcast viewing still makes up the majority share of UK audiences' TV content consumption, recent Ofcom surveys show that this share has been declining consistently. In 2017 71% of UK audiences' daily viewing time was spent on broadcast content (including live TV, recorded playback and services like iPlayer), yet as of 2023 this has fallen to 57%.[2] This is reflected in the BARB viewing data, which shows that video-sharing platforms – a sector dominated by **Alphabet** (YouTube), **Meta** (Instagram) and **Amazon** (Twitch) – account for a larger viewing share than most major UK TV networks.

[1] Values for 2014 revenues adjusted for inflation up to 2014. Revenues for USA-based companies converted from USD to GBP using 3 year averages.

[2] Ofcom Media Nations 2018, pg. 21; Media Nations 2024, pg. 7.

Figure 4: Total identified monthly viewing share (% share of total), March 2025



Subscription video-on-demand services market

Table 15 shows the number of UK households subscribed to each of the main subscription video-on-demand (SVoD) providers. In the last quarter of 2024, there were over 50.2 million total subscriptions to SVoD services - a 17% increase in household subscriptions since 2023. **Netflix**, **Amazon Prime Video** and **Disney+** account for more than three-quarters of all SVoD subscriptions in the UK, and almost eight out of ten households that use at least one SVoD are subscribed to Netflix.

Table 15: UK subscriptions to SVoD services, Q4 2024

Service	Households (m)	% of households with any subscription	Share of combined subscriptions
Netflix	17.1	86.5%	34.0%
Amazon Prime video	13.3	67.6%	26.6%
Disney+	7.6	38.6%	15.2%
Discovery	3.1	15.9%	6.3%
Paramount+	2.7	13.5%	5.3%
Apple TV+	2.6	13.2%	5.2%
NowTV	2.0	9.9%	3.9%
Xbox Live	1.3	6.6%	2.6%
HayU	0.3	1.4%	0.6%
BritBox	0.2	0.9%	0.3%
TOTAL (at least one)	**19.7m**		
Combined subscriptions	**50.2 m**		

Source: BARB[3]

[3] BARB Establishment Survey, Q4 2024 (tab T9)

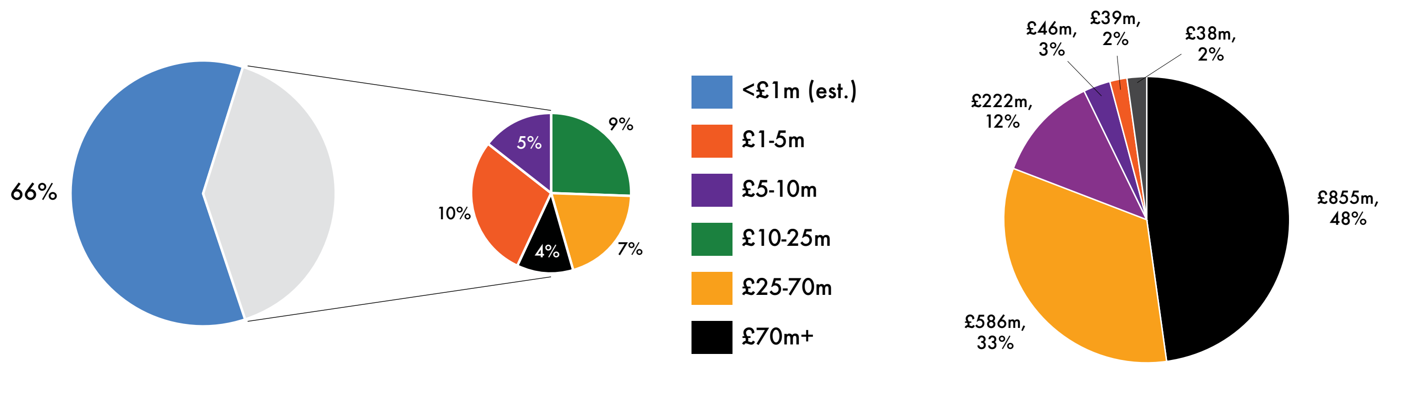
As SVoD services have become more prevalent across UK households, the consumer cost of the most popular platforms has also increased substantially. Since 2014 the annual cost of a Netflix subscription has more than doubled, from £72 to £159 (a 20% real terms increase), while Amazon Prime Video as a standalone service costs 50% more than a decade ago, or twice as much if part of a general Amazon Prime subscription. Over the same period, the nominal cost of a TV licence fee has increased by just 10% - from £145.50 a year to £169.50 – but adjusted for inflation has fallen by around 12%, contributing to a 40% reduction in the BBC's public income since 2010.

Market concentration in the UK TV production sector

The UK's largest broadcasting networks control their own in-house TV content production studios, but all of the major UK broadcasters (including Channel 4, which now plans to launch its own in-house studio) also commission content from independent production companies – with the PSBs required by law to commission at least 25% of their content from these suppliers. However, the UK's indie production sector is highly concentrated, with only a few companies receiving a vastly disproportionate share of both indie sector revenues and commissioning value from UK broadcasters.

Figure 5 shows the composition of the UK's independent TV production sector, by both turnover bracket and share of commissioning value from UK broadcasting networks. The smallest indies, with annual revenues below £1m, make up two-thirds of the sector, while those with turnovers in excess of £70m comprise just 4% of all indie companies. However, this tiny handful of the largest independent producers (12 companies out of 341) accounts for almost half of the indie sector's commissioning value generated from UK broadcasters. When including indies in the next largest turnover bracket, we can see that 11% of the sector accounts for 81% of commissioning revenue. Moreover, almost all the main UK broadcasters (with the exception of Channel 5) are over-dependent on commissions from companies with turnovers above £25m (11% of the sector) at the expense of commissioning opportunities for hundreds of smaller UK indie companies (see Figure 6).

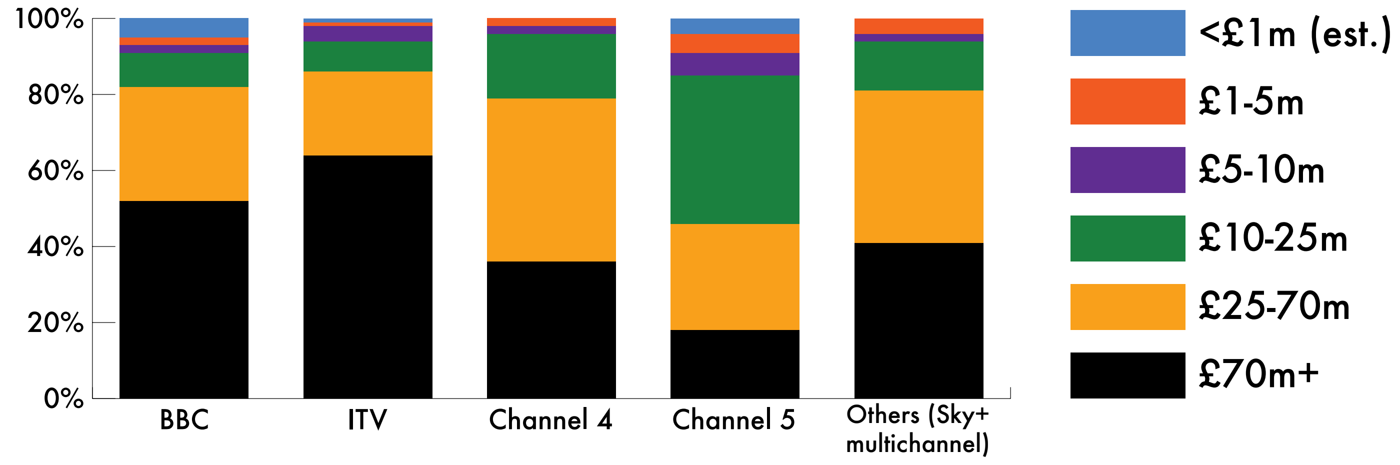
Figure 5: UK independent TV producers, by turnover bracket (left) and share of UK commissioning value (right), 2024



Source: MRC analysis of Pact data[4]

[4] Pact / Oliver & Ohlbaum, TV Production Census 2024.

Figure 6: UK broadcasters commissioning value to independent producers, 2024



Source: MRC analysis of Pact data[5]

Local TV

Much like the UK's local newspaper industry, the UK's local TV sector is subject to extreme levels of concentration. Following successive rounds of consolidation and commercialisation, the local TV model that was conceived in 2011 has fallen massively short of its ambitions for invigorating local democracy, diversifying the supply of local media and empowering communities with public access services.

Table 16: UK local TV licences by company, 2024

Licensee	Number of stations	% of stations
That's TV	21	62%
Local TV	9	26%
Latest TV	1	3%
Sheffield Local Television	1	3%
KM Television	1	3%
Notts TV	1	3%
TOTAL	**34**	**100%**

Source: Ofcom[6]

As shown in Table 16, 30 of the 34 local TV licences granted by Ofcom are controlled by just two companies – **That's TV** (21) and **Local TV** (9), with the latter owned by the second-largest local newspaper publisher **National World**. The high levels of concentrated ownership in local TV highlight both the lack of public support for the sector and the light-touch approach to monitoring and protecting plurality that is evident across the UK's media industries. The share of local TV licences held by independent operators has fallen from 50% in 2014 to just 12% in 2024. This concentration has inevitably resulted in consolidation with That's TV taking over licences from independents and subsequently reducing the number of studios creating content for these services. As a result, 15 of the 21 That's TV services do not have a studio or production centre located in the area it serves. In 2024 the company was censured by Ofcom for failing to provide substantial locally-produced news content across its network[7] Large swathes of programming time on local TV services are occupied by bought-in films or entertainment, while time given to original local news, current affairs and local interest programming is minimal.

[5] Ibid.

[6] Ofcom, details and licensing information for local TV broadcasters, statement published 19 November 2024.

[7] Ofcom broadcast bulletin 512, 16 December 2024.

Radio and podcasts

Table 17 shows the breakdown of BBC, commercial and community radio services broadcast in the UK across analogue and digital formats at the national and local level. While the BBC still provides a range of national and local radio services, and accounts for more than half of radio expenditure, the commercial sector consists of almost ten times as many stations – the majority of which are controlled by just two companies (Table 18).

Table 17: UK radio – national and local/regional services, April 2025

	BBC	Commercial
UK-wide		
DAB stations	11	67
Analogue	5	2
Local & regional		
DAB	46	625
Analogue	46	242
Community radio		
DAB	-	156
Analogue	-	306

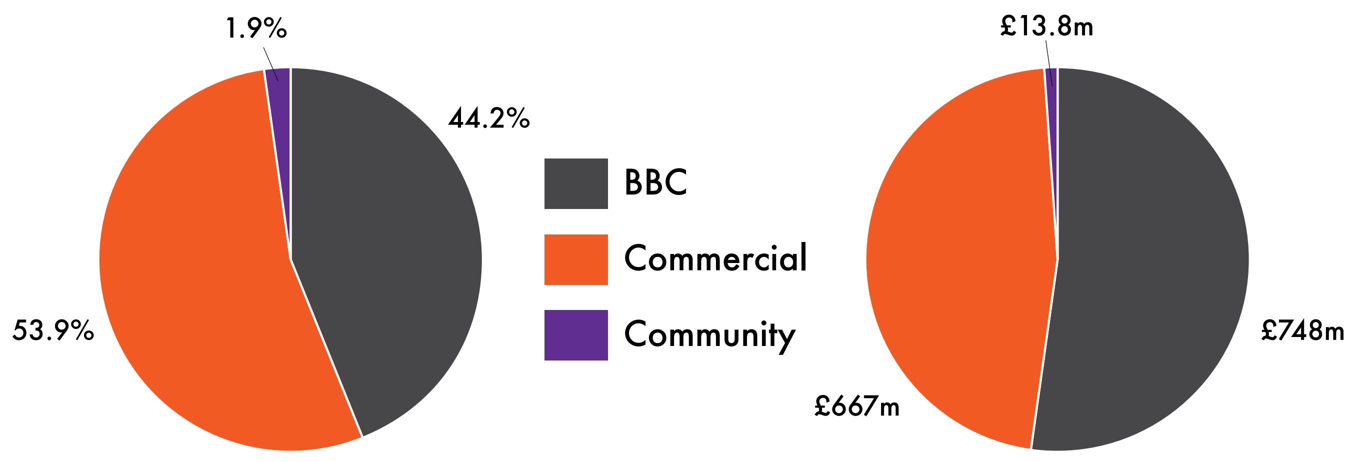
Source: Ofcom[1]

The BBC's spend on radio has remained broadly the same since 2018 (from £754m to £748m in Q4 2024), however its investment in local radio has been substantially cut, resulting in a significant loss in distinct local network services and consequently a decline in listeners.[2] Over the same six-year period, commercial radio revenues rose by 12% from £590m to £667m. Commercial radio's audience share now constitutes a majority of total radio listening, rising from 48.5% in 2018 to 53.9% in 2024, with the BBC's share of listening falling from 46.5% to 44.2%. In Q4 2024 the BBC continued to attract a smaller share of weekly audience reach (31.6m people or 55%) than the commercial sector (39.9m or 69%).

[1] Ofcom radio licences and Media Nations 2024, pg. 48.

[2] RAJAR and Press Gazette, 'Hit to BBC local radio continues as LBC's Nick Ferrari is breakfast winner', 16 May 2024.

Figure 7: BBC vs commercial radio – audience and revenue shares, Q4 2024



Source: RAJAR and Ofcom[3]

According to Ofcom licencing details, the UK has 67 national commercial DAB stations, of which two-thirds (45) are owned by the UK's two dominant commercial radio companies, **Bauer** – which operates radio brands such as Absolute, Greatest Hits and Hits Radio – and **Global** – which operates Capital, Heart, Classic FM and talk radio network LBC. Including News Broadcasting – owned by newspaper publisher **News UK** – the three largest commercial radio companies control 77% of the national DAB market, while Bauer alone controls almost 40% of the national commercial DAB market, operating twice as many UK-wide stations as the BBC.

Table 18: National commercial DAB station ownership, May 2025

Company	Number of stations	Share of total
Global Radio	25	37.3%
Bauer Radio	20	29.9%
News Broadcasting (News UK)	7	10.4%
Others & independents	15	22.4%
TOTAL	**67**	**100%**

Source: Ofcom

Bauer and Global similarly dominate the UK's local commercial radio markets across both DAB and analogue services. The local DAB market (Table 20) is significantly more plural than both the national DAB and local analogue sectors, with 625 commercial local DAB licences shared between 304 companies. Yet Bauer (21.8%) and Global (14.4%) still control far larger individual market shares than any other provider, and combined control almost as many local DAB stations as the 257 single-station operators (36.2% vs 41.1%). In local analogue provision (Table 19), Bauer and Global are again the dominant players with 37.2% and 26% ownership shares of the 242 stations.

[3] RAJAR quarterly listening Q4 2024 and Ofcom Communications Market report 2024.

Table 20: Local commercial DAB station ownership, May 2025

Company	Stations	Share
Bauer Media	136	21.8%
Global Radio	90	14.4%
Thames Radio Ltd	12	1.9%
Smooth Radio Ltd	8	1.3%
Radio Exe Ltd	8	1.3%
BFBS	8	1.3%
Children's Radio	8	1.3%
Broadcast 1 Ltd	5	0.8%
Outreach Radio Ltd	4	0.6%
Lyca	4	0.6%
Others/independent	342	54.7%
3 stations	33	5.3%
2 stations	52	8.3%
1 station	257	41.1%
TOTAL	**625**	**100%**

Table 21: Local commercial analogue station ownership, May 2025

Company	Stations	Share
Bauer Media	90	37.2%
Global Radio	63	26.0%
Independent	21	8.7%
Nation Broadcasting	16	6.6%
Communicorp	12	5.0%
Northern Media	7	2.9%
KM Group	7	2.9%
Media Sound	5	2.1%
Lyca	4	1.7%
Others	17	7.0%
TOTAL	**242**	**100%**

Source: Ofcom

This duopoly across the UK's commercial radio provision has resulted in successive rounds of station consolidation and reduction in distinct local service provision. At the start of the year Global ended all local and regional programming across its Heart, Smooth and Capital station brands in England, and even more recently Bauer has ended all of its local radio breakfast programming across analogue services in England and Wales. In both cases, the closed local services have been replaced by nationally syndicated programmes.[4]

[4] Radio Today, 'Global introduces new 'nations strategy' and drops local and regional shows in England', 9 January 2025; 'Bauer to network breakfast on heritage FM radio stations in England and Wales', 20 March 2025.

Podcasting

RAJAR estimates that 14.6 million people in the UK listen to podcasts, an increase of 1.8 million since 2023 and almost 2.5 times as many than in 2018 (Table 22). Weekly reach for podcasts now covers more than one-quarter of the UK population.

Table 22: UK podcast audiences, 2018-2024

	2018	2020	2023	Q4 2024
Weekly reach (m)	5.9	10.1	12.8	14.6
Weekly reach (%)	11%	18%	22.8%	26%

Source: RAJAR 'MIDAS'[5]

Building on successive surveys of podcast listeners (see previous MRC reports), a Yonder survey for Ofcom in early 2024 identified the most-used podcast platforms amongst UK podcast listeners (Table 23), with **Spotify** (46%), **BBC** Sounds (43%) and **Alphabet**'s YouTube (42%) the three most used podcast sources. Other services owned by **Apple**, **Amazon** (Amazon Music, Audible) and **Alphabet** (Google Podcasts) also command sizeable proportions of podcast listeners' platforms for accessing audio content.

Table 23: Top 10 podcast platforms used by UK audiences, 2020-2024

Platform	Proportion of podcast listeners		
	2020	2023	2024
Spotify	46%	43%	37%
BBC Sounds	43%	46%	38%
YouTube	42%	35%	30%
Apple Podcasts / iTunes	22%	26%	38%
Amazon (incl. Music)	18%	17%	-
Google Podcasts	16%	13%	12%
Audible (Amazon)	9%	9%	-
Specialist podcast sites	9%	-	-
Globalplayer	8%	9%	4%
Soundcloud	7%	6%	9%

Source: Yonder for Ofcom and Populus[6]

The Yonder survey also identified audiences' most listened to genres of podcasts, with entertainment (49%), news and current affairs (48%) and comedy/talk shows (tied 46%), politics/society and culture (tied 38%) and health and wellbeing (37%) listed as the most popular.[7] These genres are particularly notable for their most listened-to podcast brands and recurring series being produced or distributed by dominant broadcasting companies or established media studios, such as the BBC's Newscast, Global's The News Agents and 'The Rest Is…' series, produced by Goalhanger.

[5] RAJAR 'MIDAS' audio survey, winter 2024 and previous 'MIDAS' reports. Weekly reach figures for 2023 and 2018 calculated separately using industry trends and secondary reporting by Ofcom (see WiredGov archived post).

[6] Yonder survey for Ofcom, Q19; Populus survey for Ofcom, March 2023 table 220; Media Nations 2020, pg. 42 and Populus survey March 2020, table 74.

[7] Yonder survey for Ofcom, Q13.

Conclusion

We need urgent action to break up the corporate juggernauts and global Big Tech cartels that dominate the UK media. The essential principle that significant media power should be met with substantial public responsibilities has been diluted and ignored by successive generations of political decision-makers, with ever deeper and compounding consequences for the needs and interests of the British public. It is long past time for comprehensive public intervention to address the impact of media concentration on British democracy.

The growing market dominance and political influence of this small cadre of media giants has exposed the woeful inadequacies of the UK's media plurality regulations. Ofcom's light-touch approach to addressing the impact of media mergers and rapid consolidation in the news industry has allowed control of our media to fall into fewer and fewer hands. Similarly, the inconsistent and intermittent approach of successive UK governments towards media plurality has meant that existing UK laws are always far out of step with the realities of how Big Tech platforms, global production studios and giant corporate publishers are limiting the plurality and diversity of media available to the British public.

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 truly free and independent media that holds power to account and to serve the public as opposed to benefitting shareholders, proprietors or like-minded politicians.

Unaccountable concentrations of media power are amongst the greatest threats to a free and open democratic society. We need a proactive, future-proof framework for media plurality that supports a greater diversity of media owners, and public interest reforms to promote and uphold the highest standards in journalism:

New laws to create clear thresholds for triggering interventions on media ownership, both in and outside of active merger situations, as well as explicit detailed guidance on remedies for breaking down concentrations of media ownership – such as public interest obligations, structural separation of editorial and corporate functions, and forced divestment of assets.

Updating how Ofcom measures media plurality to properly account for the role of online intermediaries like Facebook, Google and X / Twitter in expanding and entrenching the market reach of dominant media outlets.

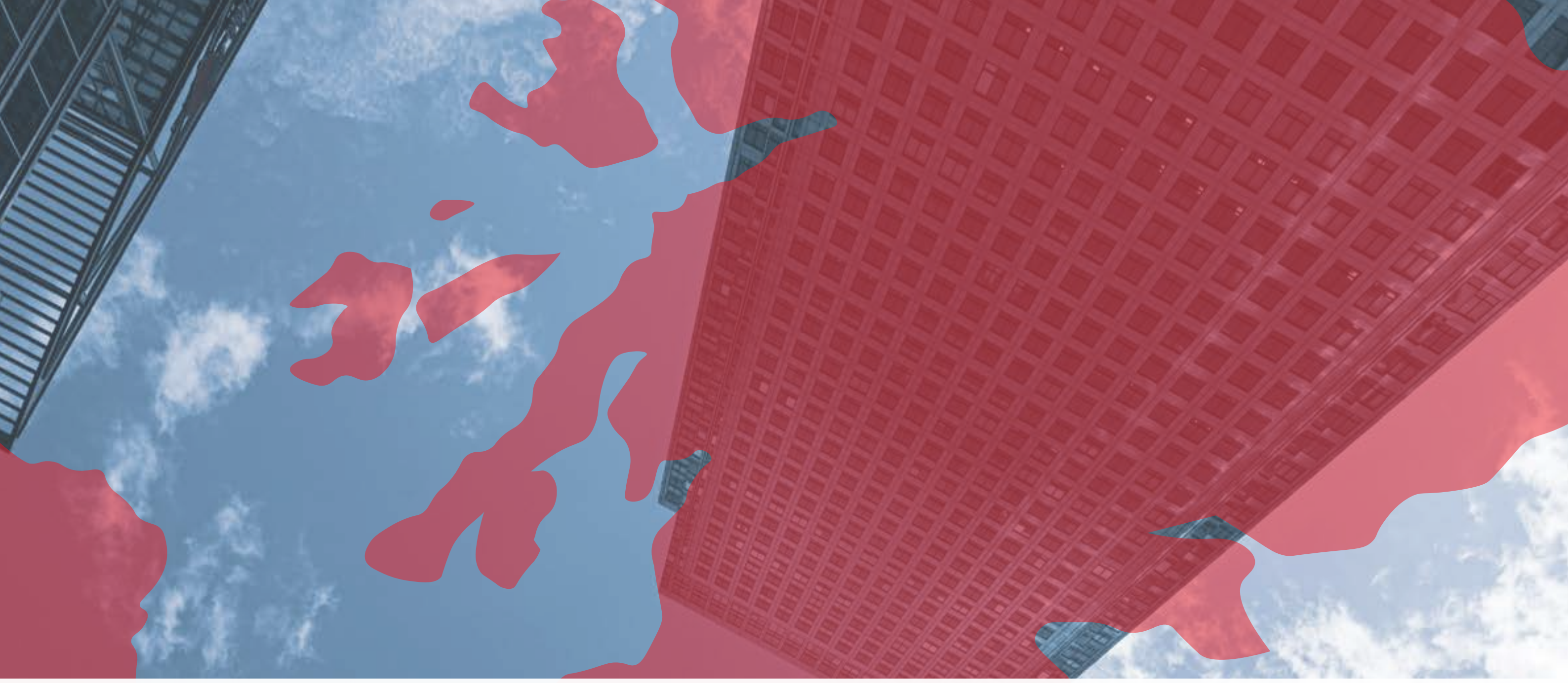
Expanding the 'fit and proper persons' test – currently only applied to takeovers involving broadcasting licences – to mergers involving any UK media enterprise. This would require that any media owner seeking to acquire or expand a market position in UK media demonstrates a genuine and sustained commitment to high standards of journalism, editorial and journalistic independence, a clear record of regulatory compliance, and effective ethical corporate governance.

Requiring that Big Tech companies like Meta and Alphabet actively promote and protect plurality and diversity on the digital platforms they control. Any effective plurality regime must grapple with the all-encompassing impact of dominant tech platforms in shaping how news is prioritised and presented for UK audiences.

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.

Big Tech corporations and global media moguls are a direct threat to a healthy and free democracy, and all signs show that these forces are mobilising against the institutions and principles that seek to guard against excessive concentrations of power.

This government may not get another chance – are they brave enough to put genuine democratic media reform at the heart of their mission to change Britain?



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Full datasets for this report are available on the Media Reform Coalition website.

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