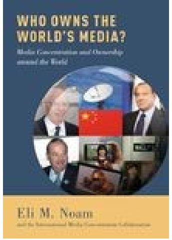

Who Owns the World's Media? Media Concentration and Ownership around the World

Eli M. Noam and The International Media Concentration Collaboration

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CHAPTER

16 Media Ownership and Concentration in the United Kingdom

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Abstract

This chapter describes media ownership and concentration in the United Kingdom. After summarizing the British media landscape, the chapter focuses on print media (newspapers, book publishing, magazine publishing), audiovisual media (radio, broadcast television, multichannel TV platforms, film), telecommunications media (wireline and wireless telecom), and Internet media (Internet Service Providers, search engines, online news market). A major concentration issue is Rupert Murdoch's hold over various media properties. The public service BBC has been traditionally a powerful player in broadcasting, and has moved into digital and online services. Commercial operators have called for the government to curb BBC's expansion efforts in the online market. The existing law is ineffective in preventing concentration and opened the door for more concentration and cross-ownership in the traditional industries like newspapers and broadcasting. In telecom, the major firms are BT and Vodafone. Cable TV is dominated by Liberty Global, while satellite TV is controlled by the Murdoch group. In print media, the major firms are Bertelsmann, Pearson, Bauer, Trinity Mirror, Daily Mail and General Trust, and The Guardian.

Keywords: British media market, media industry, Internet media, print media, cross-ownership, telecommunications, Internet, News Corp, Rupert Murdoch, BBC, Pearson, Liberty Global, BT, Vodafone, The Guardian British media market, media industry, Internet media, print media, cross-ownership, telecommunications, Internet, News Corp, Rupert Murdoch, BBC, Pearson, Liberty Global, BT, Vodafone, The Guardian

Subject: Economic Sociology, Social Research and Statistics

Introduction

At a time when media companies are becoming major actors in international commerce, and when cable, satellite, and digital platforms are increasingly globalizing media markets, questions about the possible effects of media concentration on the traditional role of the media have increasingly come to the fore.

In the United Kingdom, concentration of media ownership is increasing as evidenced by the reduction of the number of companies in several traditional media sectors, such as print and broadcasting, and the growing number of media firms that are owned by the same parent company. The intensification of concentration can also be viewed as a lever to promote market liberalization that would nurture national champions. Both "New Labor" governments (1997–2010) and the subsequent Conservative-Liberal Democrat coalition government have promoted liberalization.

Excessive media concentration in the United Kingdom is a public concern since it can endanger media pluralism and diversity. For these reasons the United Kingdom has introduced media ownership rules to preserve economic goals (open competition) and social aims (pluralism and diversity). Media regulation in the United Kingdom is governed by the provisions of the Communications Act (2003), which mostly applies to electronic media, and the Enterprise Act (2002), which applies to newspapers. The Office of Communications (Ofcom), the new super-regulatory agency set up in 2003 to replace five existing regulatory bodies—the Independent Television Commission, the Radio Authority, the Office of Telecommunications, the Broadcasting Standards Commission, and the Radiocommunications Agency—is responsible for enforcing this legislation.

p. 426 British media ownership rules are sector specific: the main objectives for establishing media ↳ ownership rules for newspapers, radio, and television broadcasting have been to protect plurality of viewpoints and provide citizens access to a wide range of sources of news and information. The media ownership rules are separate from the merger regime, which applies to all sectors of the economy, including media markets. The primary purpose of the merger regime is to retain and enhance competition, but it may indirectly protect plurality by preventing consolidation in a particular market on competition grounds. The media public interest test, introduced in 2006, allows the Secretary of State for Business, Innovation, and Skills to intervene in newspapers, broadcasting, and cross-media mergers if they raise public interest concerns. The UK regulatory regime for communications law and policy is also determined by EU legislation. Examples include the laws governing the liberalization of UK media and communications law and policy (see below), a process strongly influenced by EU provisions that increasingly foreground competition law as a means of promoting pluralism.

The Communications Act (2003) freed up the communications industry far more than was expected, removing most of the ownership regulations that characterized British broadcasting, as it was thought these deprived companies of the economies of scale and scope required to expand into foreign markets. Rules preventing the joint ownership of television and radio stations were removed; Rupert Murdoch's News International, the UK newspapers arm of News Corporation, was allowed to expand into television broadcasting; and non-European ownership of broadcasting assets was permitted, effectively clearing the field for takeovers by international firms. The decisions to permit the acquisition of *Five* by print publishers and to lift the ban on non-European ownership were particularly controversial, though these provisions proved the Blair government's free market credentials to media owners and received strong support from several major players.[1] This substantial liberalization and reduction of cross-media ownership rules has been accompanied by an increased dependence on competition law, as well as the extension of self-regulation wherever possible.

In the United Kingdom, media ownership is a subject of much political controversy—particularly when it involves media magnate Rupert Murdoch, whose News Corporation has significant market shares in the US, UK, and Australian media markets (and in others as well). The issue of one entity controlling such a large proportion of the United Kingdom's newspapers and broadcasting interests is an area of public concern—particularly when the owner(s) has a close interest in the political agenda of these newspapers.[2] In the 1980s, the Thatcher government allowed News International to take over *The Times* and *Sunday Times* without referring it to the Monopolies and Mergers Commission (MMC), even though the company already controlled *The Sun* and the (now-defunct) *News of the World*. After its defeat in the 1992 elections, the Labor Party realized that it was vital to have Murdoch on board. Murdoch's papers, of course, realized this as well: *The Sun* heralded its role in the Conservative John Major's 1992 victory with the headline "It's The Sun Wot Won It." An example of the allegedly close relationship between Murdoch and former Prime Minister Tony Blair was the former's phone call in 1998 to the Prime Minister enquiring about prospects for further developing News International's interests in the United Kingdom. Despite this, when Murdoch broadcasting giant British Sky Broadcasting (BSkyB) obtained a 17.9% stake in the terrestrial broadcaster ITV in 2008, the Blair government and the Court of Appeal made BSkyB reduce that to a 7.5% stake; BSkyB had to sell off the difference at a loss.

p. 427 In recent years, emerging issues have been framed in terms of competition considerations. ↳ One such case in 2011 was the proposed acquisition by News International, a subsidiary of News Corporation, of the remaining 61% of satellite broadcasting networks in the United Kingdom that BSkyB did not already own. The proposal prompted an unprecedented response from nearly all non-News International owned companies in the United Kingdom, both private and public. The companies wrote a letter asking the UK Business Secretary to refer the case to Ofcom on the basis that the takeover would have "serious and far-reaching consequences for media plurality."[3] In the United Kingdom, News International already owns about 34% of the newspaper market, and with the BSkyB deal, it would have controlled two-thirds of pay television. Eventually, in July 2011 the US$16 billion (£10 billion) BSkyB bid was abandoned in the light of the phone hacking scandal—"Hackgate"—at the Murdoch tabloid *News of the World*. Employees of *News of the World* and several other UK papers under the News International banner have been accused of engaging in phone hacking, police bribery, and exercising improper influence in the pursuit of stories. Given that News International also owns a 7.5% stake of the main commercial terrestrial broadcaster ITV plc, this acquisition would have raised competition concerns as well as concerns regarding media pluralism in the UK media.

It is also striking how current debates in the field of broadcasting are focused more than ever on the publicly funded British Broadcasting Corporation (BBC) and its expanding online and digital activities at a time of economic difficulties faced by its competitors. With its strong presence in radio, terrestrial TV, magazines, and digital and online domains, industrialists, some politicians, and academics have strongly criticized the BBC's business practices. Its rival, BSkyB, has run a persistent campaign calling for the government to shrink the scope of public broadcasting. Concerns regarding its expansionist strategies have been partly addressed with the suggestion by the Conservative-Liberal Democrats coalition government to reduce BBC Online's budget by 25% and to freeze BBC license fee income until 2017. However, there are voices that argue that any cut to the BBC license fee raises fundamental questions about the BBC's independence from the government.[4]

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Print Media

Newspapers

There are five national daily "quality" titles—*The Guardian, The Independent, The Financial Times, The Times*, and *The Daily Telegraph*—each owned by a different newspapers group. In addition, there are two national daily "mid-market" titles, the *Daily Mail* and the *Daily Express*. Then come the three national daily "tabloids": *The Sun*, the *Daily Mirror, and the Daily Star*. *The Sun* belongs to the same group that owns *The Times*, News International. Finally are the 10 Sunday titles—*Sunday Mirror, The People, Sunday Mail, Daily Star Sunday, Mail on Sunday, Sunday Express, The Sunday Times, The Sunday Telegraph, The Observer*, and *The Independent on Sunday*. The Sunday editions follow their eponymous daily papers.

News International is controlled by News Corporation, which is controlled by the Murdoch family and publishes *The Sun, The Times*, and *The Sunday Times*. As already noted, its politics are regarded as being fairly conservative. News Corporation split in 2012 into two separate publicly listed companies—one for newspapers, book publishing, and education (News International); and the other for audiovisual media and entertainment programming (21st Century Fox). The restructure was expected to protect the group's robust film and television assets from the publishing businesses, which ↳ were undervalued after the phone-hacking scandal's rising legal costs. Given that Rupert Murdoch, chairman and chief executive of News Corp, has served as the chairman of both companies, control still essentially remains in the same hands.

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Telegraph Media Group is owned by the British businessmen Sir David Rowat Barclay and Sir Frederick Hugh Barclay, who acquired the business in 2004 for US$1.2 billion (£665 million). It prints *The Daily Telegraph, The Sunday Telegraph*, the weekly magazine *The Spectator*, *The Scotsman* (plus its Sunday edition, *Scotland on Sunday*), and the *Edinburgh Evening News*. Telegraph offerings are regarded as offering independent political coverage, though they have historically leaned toward the Conservative Party.

The Daily Mail and General Trust is owned by the British media conglomerate Daily Mail and General Trust plc and prints *The Daily Mail, Mail on Sunday, Ireland on Sunday, Mail Today* (a joint venture with the Indian media conglomerate Living Media), and several specialized dailies such as the national urban market daily *Metro*, the classified directory *Loot*, and the *London Lite* "free sheet." Until January 2009, the group also owned the dominant paid-subscription London metro daily *Evening Standard*, but sold the paper to the Russian billionaire Alexander Lebedev. Most of the titles owned by the group are tabloid newspapers that focus on "light news," celebrity lifestyles, and some limited political reporting.

Guardian Media Group (GMG), which is wholly owned by the limited company Scott Trust, owns *The Guardian* and *The Observer*; *Manchester Evening News* (a regional newspaper); Channel M (a regional TV station); numerous regional radio stations across the United Kingdom under the *Real Radio*, *Smooth Radio*, and *Rock Radio* brands; and Bauer Radio, a division of the leading international magazine publishing company Bauer. The political perspective of GMG's newspapers is regarded as left leaning.

Independent News and Media's main newspapers are the *Irish Independent* and the *Sunday Independent*, which are Ireland's best-selling newspapers. The O'Reilly family has a controlling stake of 28.2% in the group, with Irish entrepreneur Dennis O'Brien owning the largest stake after that, of 22.5%. Through his company, Communicorp, O'Brien also owns two national radio channels, *Newstalk* and *Today FM*, plus 40 other stations in the EU. In addition, Independent News and Media owns the Belfast Telegraph Group, which publishes the *Belfast Telegraph*, *Ireland's Saturday Night*, *Sunday Life*, and *Ads for Free*. These newspapers are regarded as offering independent political coverage. Until 2010, the company published the UK titles *The Independent* and *The Independent on Sunday*, but both newspapers were sold to Alexander Lebedev.

Trinity Mirror plc (managed by businesswoman Sly Bailey) is the result of the takeover of Mirror Group Newspapers by Trinity plc in September 1999. It owns the *Daily Mirror, Sunday Mirror, The People, Daily Record*, and the *Sunday Mail*—in addition to around 120 other (regional) tabloids that run either daily or weekly editions.

Pearson plc, helmed by Dennis Stevenson, is a relatively new entry to the UK media market, having only gotten into the newspaper business in the 1920s. Since the 1990s, it has transformed itself from its roots as an industrial holding company to a major publisher of educational materials and news with three major business groups: Pearson Education, the Penguin Group, and the Financial Times Group, which publishes the *Financial Times* in the global English-language market, *Les Echos* in France, and *Expansion* in Spain. It also owns 50% of The Economist Group (publisher of *The Economist*), plus a host of personal finance magazines.

Finally, Northern & Shell Network is owned by Richard Desmond and publishes the *Daily Express*, *Sunday Express*, and the *Daily Star*. It also owns the magazines *New!* and *Star* (Table 16.1).

Table 16-1. Daily Newspaper (Market Shares by Circulation) 1997–2012

	1997	2001	2002	2008	2009	2012
News International (News Corp., Murdoch Family, US/AUS)	34.4	31.8	32.2	34.8	33.8	32.5
The Sun	*29.7*	*26.6*	*27.3*	*29.2*	*28.1*	*28*
The Times	*4.7*	*5.2*	*4.9*	*5.6*	*5.7*	*4.5*
Trinity Mirror plc	23.9	21.0	20.2	15.6	16.2	15.1
Daily Mirror	*18.3*	*16.4*	*16.1*	*12.4*	*12.9*	*12*
Daily Record	*5.6*	*4.6*	*4.1*	*3.2*	*3.3*	*3.1*
Northern & Shell (Richard Desmond)	14.3	12.5	13.8	14.9	13.5	13
Daily Star	*4.9*	*5.6*	*6.5*	*8.1*	*6.9*	*6.7*
Daily Express	*9.4*	*6.9*	*7.3*	*6.8*	*6.9*	*6.3*
Daily Mail & General Trust (*Daily Mail*)	13.6	18.7	18.5	21.2	19.9	21.5
Telegraph Group (Barclay Brothers, *Daily Telegraph*)	7.7	7.7	7.3	7.4	7.3	6.4
Pearson plc (*Financial Times*)	1.3	3.8	3.5	4.0	4.1	3.3
Guardian Media Group (Scott Trust, *The Guardian*)	2.7	3.1	3.0	3.0	3.3	2.4
Independent Print Ltd (Alexander Lebedev, *The Independent*)	2.1	1.5	1.4	1.8	1.9	1.0
Total Revenue (mil £)[1]	5,152	6,517	6,393	5,529	6,580	5,608
Total Revenue (mil US$)	8,450	9,385	9,590	10,283	10,330	8,887
C4	86.2	84	84.7	86.5	83.4	82.5
HHI	2,217	2,044	2,054	2,209	2,068	1,974
N (>1%)	8	8	8	8	8	8
Noam Index	784	723	*726*	*781*	731	698

Source: Audit Bureau of Circulations, 2010, 2012 http://www.abc.org.uk/.

1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

The UK national daily newspapers market is highly concentrated. News International is a clear market leader and has managed to gain and retain very high market shares. In 2012, News International's market share of daily newspapers was more than double compared to that of Trinity Mirror plc's, the second biggest UK media group.

p. 429 The newspaper is in decline, though, as circulation has been falling steadily over the past four decades. In the period from 1965 to 2005, the cumulative loss of circulation of popular and quality dailies was 29% and 31%, respectively, owing among other factors to the rise of television and the Internet. Since 2008, this has been exacerbated by the global financial crisis. While two of the best-selling newspapers, *The Sun* and the *Daily Mirror*, had about 3.5 million and 2 million readers, respectively, in 2002, this dropped to 2.9 million and 1.3 million, respectively, in 2009. In terms of revenues, for FY2008–2009 newspapers experienced the biggest reduction in advertising revenues among traditional media ever, falling by more than 20%, TV advertising revenues fell by 9%, and radio advertising revenues by 15%.[5]

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Book Publishing

The UK book publishing industry is dominated by four groups: Hachette, Random House, HarperCollins, and Penguin Books. In 2004, the market share of these four was greater than 50%, and although it has been declining slightly since then, the four still account for a considerable overall market share. In the last decade, the top two—Hachette and Random House—lost market shares. Penguin Books saw its market share rising from 10.5% to 11.7%, and HarperCollins began regaining market share in 2011 after several years of decline.

However, the future of book publishing faces a declining economy, a shrinking distribution network, and, above all, a decline in physical book sales. The main problem facing the book publishing industry is the uncertainty surrounding digital publishing. In fact, at the 2011 London Book Fair, a seminar debated the prompt “Authors and readers are all that matter. Publishers will soon be irrelevent.”[6] In a similar vein of self-examination, *The Bookseller* magazine that year enquired whether publisher performance based on Nielsen BookScan Total Consumer Market print figures is still a relevant metric in today’s increasingly p. 431 digitalized ↳ market. The answer was a qualified yes: digital sales in 2011 may have made up about 10% of the market, perhaps up to 12% for some publishers, but an overwhelming majority of the market is still print-based (Table 16.2).

Table 16-2. Book Publishing (Market Shares by Revenue) 2004–2011

	2004	2008	2009	2010	2011
Hachette (Lagardère, France)	17.0	15.9	16.4	15.2	13.9
Random House (Bertelsmann AG, Germany)	15.5	14.8	13.7	13.8	13.2
Penguin Books (UK)	10.5	10	9.7	11.5	11.7
HarperCollins (News Corporation, US/UK/AUS)	9.0	8.3	7.6	7.1	7.7
The Independent Alliance[1]	—	4.0	4.0	3.9	3.3
Pan Macmillan (Macmillan Group, Holtzbrinck, Germany)	3.0	3.3	3.2	3.6	3.7
Bloomsbury	2.5	2.4	2.2	2.1	2.3
Pearson	2.2	2.4	1.9	1.8	2.4
Oxford University Press	2.5	1.9	1.9	2.0	2.0
John Wiley	1.7	1.5	1.5	1.5	1.5
Simon & Schuster (Viacom, US)	1.4	1.5	1.8	1.8	2.0
Others	34.7	34.0	36.1	35.7	36.3
Total Revenue (mil £)[2]	3,348	4,268	3,718	3,748	3,817
Total Revenue (mil US$)	6,162	6,828	5,838	5,810	6,107
C4	52.0	49.0	47.4	47.6	46.5
HHI	752	687	652	649	610
N (>1%)	10	11	11	11	11
Noam Index	238	207	197	196	184

Source: Nielsen BookScan TCM 2005, 2009, 2010, 2011, 2012; *The Bookseller*: 2010, 2011.

1 The *Independent Alliance*, an association of 10 UK publishers, was formed in 2005 and its members are Atlantic Books, Conongate Books, Faber and Faber, Granta Books, Icon Books, Portobello Books, Profile Books, Quercus Publishing, Serpent's Tail, and Short Books.

2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Magazine Publishing

The United Kingdom has the world's highest per capita concentration of magazine titles. There are more than 8,000 titles published in Britain, mostly out of London. Consumer magazines make up the bulk of the titles for sale. Uniquely, most UK magazines for consumers—about 90% of them—are sold through newsagents or supermarkets. This is a much higher proportion than in the United States and continental Europe, where subscription services are much more popular. Consumer magazines may be general titles that aim to entertain and inform, or specialist titles aimed at a specific interest or hobby. There are about 2,800 UK consumer magazines.[7]

The biggest UK magazine publishers by sales revenue are Bauer (Germany), which in 2008 took over the then second-largest group, EMAP; IPC Media, owned by Time Inc., the magazine publishing subsidiary of Time Warner in the United States, which in 2001 acquired IPC Media for US$1.7 billion (£1.15 billion) in the biggest magazine deal ever seen in the United Kingdom; Hearst Magazines UK, the product of the US$651 million (£407 million) merger in p. 432 ↳ 2011 of the National Magazines Company with Hachette Filipacchi Médias, and BBC Magazines. In terms of circulation in 2011, Bauer was the market leader, selling 5.8 million copies with IPC Media/Time Warner a close second, having sold 5.7 million copies. In the same year, Hearst Magazines UK sold about 4.1 million copies, followed by BBC Magazines (2.95 million), Condé Nast (1.54 million), Egmont UK Publishing (610,000 copies), Hubert Burda (550,000 copies), and Haymarket (380,000 copies). Foreign concerns own most UK consumer titles. IPC Media and Condé Nast are owned by the US groups Time Warner and Advance Publications, respectively. The largest British-owned company is BBC Magazines (Table 16.3).

Table 16-3. Magazine Publishing (Market Shares by Revenue) 2004–2011

	2004	2008	2011	Circulation: 2011 (mil copies)
Bauer (Germany)	18.0	20.0	26.0	5.8
IPC Media/Time Warner (US)[1]	20.0	22.0	20.0	5.7
Hearst Magazines UK (US/France)	13.5	15.0	15.0	4.1
BBC Magazines (Public)	11.5	10.0	9.5	3.0
Condé Nast (Advance Publications, US)	4.8	4.5	4.0	1.5
Egmont Group (Denmark)	2.5	2.5	2.5	0.6
Hubert Burda (Germany)	2.0	2.0	2.0	0.6
Haymarket Media Group (UK)	1.5	1.5	1.3	0.4
Other	26.2	22.5	19.7	–
Total Revenue (mil £)[2]	3,315	3,711	4,506	
Total Revenue (mil US$)	6,067	6,903	7,210	
C4	63.0	67.0	70.5	
HHI	1,074	1,242	1,419	
N (>1%)	8	8	8	
Noam Index	380	439	501	

Source: Press Gazette Reporters, 2011. http://www.pressgazette.co.uk/magazine.

1 IPC Media/Time Warner includes *IPC Inspire* (leisure brands), *IPC Connect* (women's weeklies), and *IPC Southbank* (up-market women's division).

2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

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News International is controlled by News Corporation, which is controlled by the Murdoch family and publishes *The Sun, The Times*, and *The Sunday Times*. As already noted, its politics are regarded as being fairly conservative. News Corporation split in 2012 into two separate publicly listed companies—one for newspapers, book publishing, and education (News International); and the other for audiovisual media and entertainment programming (21st Century Fox). The restructure was expected to protect the group's robust film and television assets from the publishing businesses, which ↳ were undervalued after the phone-hacking scandal's rising legal costs. Given that Rupert Murdoch, chairman and chief executive of News Corp, has served as the chairman of both companies, control still essentially remains in the same hands.

Telegraph Media Group is owned by the British businessmen Sir David Rowat Barclay and Sir Frederick Hugh Barclay, who acquired the business in 2004 for US$1.2 billion (£665 million). It prints *The Daily Telegraph, The Sunday Telegraph*, the weekly magazine *The Spectator*, *The Scotsman* (plus its Sunday edition, *Scotland on Sunday*), and the *Edinburgh Evening News*. Telegraph offerings are regarded as offering independent political coverage, though they have historically leaned toward the Conservative Party.

The Daily Mail and General Trust is owned by the British media conglomerate Daily Mail and General Trust plc and prints *The Daily Mail, Mail on Sunday, Ireland on Sunday, Mail Today* (a joint venture with the Indian media conglomerate Living Media), and several specialized dailies such as the national urban market daily *Metro*, the classified directory *Loot*, and the *London Lite* "free sheet." Until January 2009, the group also owned the dominant paid-subscription London metro daily *Evening Standard*, but sold the paper to the Russian billionaire Alexander Lebedev. Most of the titles owned by the group are tabloid newspapers that focus on "light news," celebrity lifestyles, and some limited political reporting.

Guardian Media Group (GMG), which is wholly owned by the limited company Scott Trust, owns *The Guardian* and *The Observer; Manchester Evening News* (a regional newspaper); Channel M (a regional TV station); numerous regional radio stations across the United Kingdom under the *Real Radio*, *Smooth Radio*, and *Rock Radio* brands; and Bauer Radio, a division of the leading international magazine publishing company Bauer. The political perspective of GMG's newspapers is regarded as left leaning.

Independent News and Media's main newspapers are the *Irish Independent* and the *Sunday Independent*, which are Ireland's best-selling newspapers. The O'Reilly family has a controlling stake of 28.2% in the group, with Irish entrepreneur Dennis O'Brien owning the largest stake after that, of 22.5%. Through his company, Communicorp, O'Brien also owns two national radio channels, *Newstalk* and *Today FM*, plus 40 other stations in the EU. In addition, Independent News and Media owns the Belfast Telegraph Group, which publishes the *Belfast Telegraph*, *Ireland's Saturday Night*, *Sunday Life*, and *Ads for Free*. These newspapers are regarded as offering independent political coverage. Until 2010, the company published the UK titles *The Independent* and *The Independent on Sunday*, but both newspapers were sold to Alexander Lebedev.

Trinity Mirror plc (managed by businesswoman Sly Bailey) is the result of the takeover of Mirror Group Newspapers by Trinity plc in September 1999. It owns the *Daily Mirror, Sunday Mirror, The People, Daily Record*, and the *Sunday Mail*—in addition to around 120 other (regional) tabloids that run either daily or weekly editions.

Pearson plc, helmed by Dennis Stevenson, is a relatively new entry to the UK media market, having only gotten into the newspaper business in the 1920s. Since the 1990s, it has transformed itself from its roots as an industrial holding company to a major publisher of educational materials and news with three major business groups: Pearson Education, the Penguin Group, and the Financial Times Group, which publishes the *Financial Times* in the global English-language market, *Les Echos* in France, and *Expansion* in Spain. It also owns 50% of The Economist Group (publisher of *The Economist*), plus a host of personal finance magazines.

Finally, Northern & Shell Network is owned by Richard Desmond and publishes the *Daily Express, Sunday Express*, and the *Daily Star*. It also owns the magazines *New!* and *Star* (Table 16.1).

Table 16-1. Daily Newspaper (Market Shares by Circulation) 1997–2012

	1997	2001	2002	2008	2009	2012
News International (News Corp., Murdoch Family, US/AUS)	34.4	31.8	32.2	34.8	33.8	32.5
The Sun	*29.7*	*26.6*	*27.3*	*29.2*	*28.1*	*28*
The Times	*4.7*	*5.2*	*4.9*	*5.6*	*5.7*	*4.5*
Trinity Mirror plc	23.9	21.0	20.2	15.6	16.2	15.1
Daily Mirror	*18.3*	*16.4*	*16.1*	*12.4*	*12.9*	*12*
Daily Record	*5.6*	*4.6*	*4.1*	*3.2*	*3.3*	*3.1*
Northern & Shell (Richard Desmond)	14.3	12.5	13.8	14.9	13.5	13
Daily Star	*4.9*	*5.6*	*6.5*	*8.1*	*6.9*	*6.7*
Daily Express	*9.4*	*6.9*	*7.3*	*6.8*	*6.9*	*6.3*
Daily Mail & General Trust (*Daily Mail*)	13.6	18.7	18.5	21.2	19.9	21.5
Telegraph Group (Barclay Brothers, *Daily Telegraph*)	7.7	7.7	7.3	7.4	7.3	6.4
Pearson plc (*Financial Times*)	1.3	3.8	3.5	4.0	4.1	3.3
Guardian Media Group (Scott Trust, *The Guardian*)	2.7	3.1	3.0	3.0	3.3	2.4
Independent Print Ltd (Alexander Lebedev, *The Independent*)	2.1	1.5	1.4	1.8	1.9	1.0
Total Revenue (mil £)[1]	5,152	6,517	6,393	5,529	6,580	5,608
Total Revenue (mil US$)	8,450	9,385	9,590	10,283	10,330	8,887
C4	86.2	84	84.7	86.5	83.4	82.5
HHI	2,217	2,044	2,054	2,209	2,068	1,974
N (>1%)	8	8	8	8	8	8
Noam Index	784	723	*726*	*781*	731	698

Source: Audit Bureau of Circulations, 2010, 2012 http://www.abc.org.uk/.

1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

The UK national daily newspapers market is highly concentrated. News International is a clear market leader and has managed to gain and retain very high market shares. In 2012, News International's market share of daily newspapers was more than double compared to that of Trinity Mirror plc's, the second biggest UK media group.

p. 429 The newspaper is in decline, though, as circulation has been falling steadily over the past four decades. In the period from 1965 to 2005, the cumulative loss of circulation of popular and quality dailies was 29% and 31%, respectively, owing among other factors to the rise of television and the Internet. Since 2008, this has been exacerbated by the global financial crisis. While two of the best-selling newspapers, *The Sun* and the *Daily Mirror*, had about 3.5 million and 2 million readers, respectively, in 2002, this dropped to 2.9 million and 1.3 million, respectively, in 2009. In terms of revenues, for FY2008–2009 newspapers experienced the biggest reduction in advertising revenues among traditional media ever, falling by more than 20%, TV advertising revenues fell by 9%, and radio advertising revenues by 15%.[5]

p. 430 **Book Publishing**

The UK book publishing industry is dominated by four groups: Hachette, Random House, HarperCollins, and Penguin Books. In 2004, the market share of these four was greater than 50%, and although it has been declining slightly since then, the four still account for a considerable overall market share. In the last decade, the top two—Hachette and Random House—lost market shares. Penguin Books saw its market share rising from 10.5% to 11.7%, and HarperCollins began regaining market share in 2011 after several years of decline.

However, the future of book publishing faces a declining economy, a shrinking distribution network, and, above all, a decline in physical book sales. The main problem facing the book publishing industry is the uncertainty surrounding digital publishing. In fact, at the 2011 London Book Fair, a seminar debated the prompt "Authors and readers are all that matter. Publishers will soon be irrelevent."[6] In a similar vein of self-examination, *The Bookseller* magazine that year enquired whether publisher performance based on Nielsen BookScan Total Consumer Market print figures is still a relevant metric in today's increasingly
p. 431 digitalized ↳ market. The answer was a qualified yes: digital sales in 2011 may have made up about 10% of the market, perhaps up to 12% for some publishers, but an overwhelming majority of the market is still print-based (Table 16.2).

Table 16-2. Book Publishing (Market Shares by Revenue) 2004–2011

	2004	2008	2009	2010	2011
Hachette (Lagardère, France)	17.0	15.9	16.4	15.2	13.9
Random House (Bertelsmann AG, Germany)	15.5	14.8	13.7	13.8	13.2
Penguin Books (UK)	10.5	10	9.7	11.5	11.7
HarperCollins (News Corporation, US/UK/AUS)	9.0	8.3	7.6	7.1	7.7
The Independent Alliance[1]	—	4.0	4.0	3.9	3.3
Pan Macmillan (Macmillan Group, Holtzbrinck, Germany)	3.0	3.3	3.2	3.6	3.7
Bloomsbury	2.5	2.4	2.2	2.1	2.3
Pearson	2.2	2.4	1.9	1.8	2.4
Oxford University Press	2.5	1.9	1.9	2.0	2.0
John Wiley	1.7	1.5	1.5	1.5	1.5
Simon & Schuster (Viacom, US)	1.4	1.5	1.8	1.8	2.0
Others	34.7	34.0	36.1	35.7	36.3
Total Revenue (mil £)[2]	3,348	4,268	3,718	3,748	3,817
Total Revenue (mil US$)	6,162	6,828	5,838	5,810	6,107
C4	52.0	49.0	47.4	47.6	46.5
HHI	752	687	652	649	610
N (>1%)	10	11	11	11	11
Noam Index	238	207	197	196	184

Source: Nielsen BookScan TCM 2005, 2009, 2010, 2011, 2012; *The Bookseller*: 2010, 2011.

1 The *Independent Alliance*, an association of 10 UK publishers, was formed in 2005 and its members are Atlantic Books, Conongate Books, Faber and Faber, Granta Books, Icon Books, Portobello Books, Profile Books, Quercus Publishing, Serpent's Tail, and Short Books.

2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Magazine Publishing

The United Kingdom has the world's highest per capita concentration of magazine titles. There are more than 8,000 titles published in Britain, mostly out of London. Consumer magazines make up the bulk of the titles for sale. Uniquely, most UK magazines for consumers—about 90% of them—are sold through newsagents or supermarkets. This is a much higher proportion than in the United States and continental Europe, where subscription services are much more popular. Consumer magazines may be general titles that aim to entertain and inform, or specialist titles aimed at a specific interest or hobby. There are about 2,800 UK consumer magazines.[7]

The biggest UK magazine publishers by sales revenue are Bauer (Germany), which in 2008 took over the then second-largest group, EMAP; IPC Media, owned by Time Inc., the magazine publishing subsidiary of Time Warner in the United States, which in 2001 acquired IPC Media for US$1.7 billion (£1.15 billion) in the biggest magazine deal ever seen in the United Kingdom; Hearst Magazines UK, the product of the US$651 million (£407 million) merger in p. 432 ↳ 2011 of the National Magazines Company with Hachette Filipacchi Médias, and BBC Magazines. In terms of circulation in 2011, Bauer was the market leader, selling 5.8 million copies with IPC Media/Time Warner a close second, having sold 5.7 million copies. In the same year, Hearst Magazines UK sold about 4.1 million copies, followed by BBC Magazines (2.95 million), Condé Nast (1.54 million), Egmont UK Publishing (610,000 copies), Hubert Burda (550,000 copies), and Haymarket (380,000 copies). Foreign concerns own most UK consumer titles. IPC Media and Condé Nast are owned by the US groups Time Warner and Advance Publications, respectively. The largest British-owned company is BBC Magazines (Table 16.3).

Table 16-3. Magazine Publishing (Market Shares by Revenue) 2004–2011

	2004	2008	2011	Circulation: 2011 (mil copies)
Bauer (Germany)	18.0	20.0	26.0	5.8
IPC Media/Time Warner (US)[1]	20.0	22.0	20.0	5.7
Hearst Magazines UK (US/France)	13.5	15.0	15.0	4.1
BBC Magazines (Public)	11.5	10.0	9.5	3.0
Condé Nast (Advance Publications, US)	4.8	4.5	4.0	1.5
Egmont Group (Denmark)	2.5	2.5	2.5	0.6
Hubert Burda (Germany)	2.0	2.0	2.0	0.6
Haymarket Media Group (UK)	1.5	1.5	1.3	0.4
Other	26.2	22.5	19.7	–
Total Revenue (mil £)[2]	3,315	3,711	4,506	
Total Revenue (mil US$)	6,067	6,903	7,210	
C4	63.0	67.0	70.5	
HHI	1,074	1,242	1,419	
N (>1%)	8	8	8	
Noam Index	380	439	501	

Source: Press Gazette Reporters, 2011. http://www.pressgazette.co.uk/magazine.

1 IPC Media/Time Warner includes *IPC Inspire* (leisure brands), *IPC Connect* (women's weeklies), and *IPC Southbank* (up-market women's division).

2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Radio

The public BBC dominates the UK national radio market, while a plethora of private commercial radio stations operate at the local and regional levels. There are 40 local stations in England, and two national services in Wales, Scotland, and Northern Ireland each (altogether there are 10 national BBC stations), including non-English language stations in Wales and Scotland. There are four national commercial broadcasting stations, and approximately 300 local or regional commercial broadcasters, including Global, Bauer, TLRG, UTV, and GMG. There are 146 community radio stations in the United Kingdom outside of the BBC's jurisdiction, and not-for profit community groups with either a geographical or special interest focus run them. The BBC network has a dominant audience share of 47% and the local BBC stations account for an additional 9%. The national commercial broadcasters account for just 10% of the national market share, while the local/regional commercial broadcasters hold 31% of it.[8]

While in 1996 the BBC and commercial radio had an almost equal market share of 50:50, in more recent years, BBC radio stations have surpassed commercial radio: in 2011, BBC's share had risen to 54.5%. One reason is that the BBC national radio retains the best national FM frequencies, while commercial radio's FM frequencies are predominantly local ones and as such have limited range.

Of the commercial groups, the most popular is Global Radio UK, the largest commercial radio company in the country following the acquisitions of Chrysalis Radio and GCap Media in 2008. In June 2012, Total GMG Radio, the United Kingdom's third-largest radio group, reportedly signed a US$111 million (£70 million) deal with market leader Global Radio UK, strengthening the market position of Global Radio and leaving Bauer Radio (owned by foreign interests) in a distant second place. Table 16.4 does not take account of this development, as at the time of writing a regulatory review into the deal was expected to take place to clear it. GMG, owner of the United Kingdom's third-largest radio group, sold its radio business in 2012 to the market leader, Global Radio. Meanwhile, there is speculation that Bauer Radio will be forced to look at further acquisitions in the radio market in order to remain competitive against Global Radio.

Table 16-4. Radio Groups (Market Shares by Revenue), 1996–2011

	1996	2004	2008	2011	Listeners: 2011 (mil ppl)
BBC	48.9	52.9	55.2	54.5	
BBC Network Radio[1]	—	*42.0*	*46.7*	*46.6*	
BBC Radio One	—	*7.7*	*9.8*	*9.8*	*11.1*
BBC Radio Two	—	*16.0*	*16.5*	*16.5*	*13.6*
BBC Radio Three	—	*1.4*	*1.1*	*1.1*	
BBC Radio Four	—	*11.5*	*12.5*	*19.4*	*10.2*
BBC Radio Five Live	—	*4.4*	*4.5*	*4.5*	*6.5*
Global Radio UK (UK)[2]			17.0	16.3	
Bauer Radio (Germany)[3]			10.9	11.7	
GMG Radio (Guardian Media Group)[4]			4.4	4.5	
Other		11.7	12.5	13.0	
Total Revenue (mil £)[5]		1,559	1,581	1,729	
Total Revenue (mil US$)		2,853	2,941	2,767	
C4			87.5	87.0	
HHI			3,474	3,393	
N (>1%)			4	4	
Noam Index			1,737	1,697	

Source: RAJAR.

1 *BBC Radio Three* is a music station and *BBC Radio Four* is the dominant UK news and talk show service, and its early morning news sequence is regarded as an agenda setter in UK national politics. *BBC Radio One* and *Two* are national pop music stations that have some public service elements. *BBC Radio Five Live* offers sports, news, and talk show content.

2 *Heart Network UK, Classic FM, Capital Network*, and *Gold UK Network*.

3 *Magic UK* and *Kiss UK*.

4 *Smooth Radio UK* and *Real Radio UK*.

5 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Despite the wide availability of other audiovisual platforms, radio remains very popular in the United Kingdom. A survey of RAJAR quarterly listening reports shows that 46.7 million adults tune in each week. The market share of radio via a digital platform stands at 29.1% of all radio listening in 2011, slightly up from 25% in 2010.[9]

Broadcast Television

The audience share for terrestrial television broadcasting has been declining over the years, owing to multichannel development, audience fragmentation, and changing audience habits. Commercial broadcasters, faced with fragmentation in audience share and diminishing advertising revenues, have begun to experiment with new business models and portfolio expansion.

For example, in October 2005 Channel 4 launched *More4*, which offered current affairs, drama, and comedy programming to the over 35 demographic, while in November 2005, ITV launched *ITV4*, which was targeted at men and broadcast US sports coverage and Hollywood films (in 2004, it had introduced the entertainment channel *ITV3*). In 2006, the terrestrial commercial channel *Five* launched two new digital services: *Five Life*, providing preschool shows, popular lifestyle shows aimed at women, as well as films and soap operas; and *Five USA*, which offers drama, films, sport, comedy, and children's television content from across the Atlantic. Meanwhile, the BBC has launched numerous over-the-air digital channels like *BBC Three, BBC Four, BBC News 24*, and the children-oriented services *CBeebies* and *CBBC*. But apart from a few exceptions, these
p. 434 ventures have not ↳ been successful in winning many new viewers for their networks (Table 16.5).

Table 16-5. TV Broadcasting (Market Shares) 1982–2012

	1982	1986[1]	1990	1994	1998	2002	2004	2006	2008	2010	2012[2]
BBC (One & Two)	50.0	48.0	47.0	44.8	44.5	44.3	41.4	41.6	43.6	42.6	50.1
ITV (GMTV)	50.0	44.0	44.0	40.7	34.5	28.4	27,2	26.0	24.1	25.4	21.8
Channel 4 (S4C)		8.0	9.0	11.5	11.3	11.8	11.6	13.0	11.1	10.0	9.8
Five					4.7	7.4	7.9	7.4	7.5	7.0	3.3
Others (over-the-air)[3]				3.0	5.0	8.0	10.0	12.0	14.0	15.0	15.0
Total Revenue (mil £)[4]					4,446		5,714		7,053	8,136	10,947
Total Revenue (mil US$)					7,381		10,457		13,118	12,611	16,531
C4	100.0	100.0	100.0	97.0	95.0	91.9	88.9	88.0	86.3	85.0	95.0
HHI	5,000	4,304	4,226	3,796	3,320	2,963	2,651	2,630	2,661	2,609	3,092
N (>1%)	2	3	3	3	4	4	4	4	4	4	4
Noam Index	3,536	2,485	2,440	2,191	1,660	1,482	1,326	1,315	1,331	1,305	1,546

Source: Broadcasters' Audience Research Board (BARB). Source: 2012 Ofcom Stakeholders report 2012 updates by editors, with "others" estimated.

1 Shares before 1998 have been rounded to nearest whole number.

2 Affected by Olympic year in London, carried exclusively by BBC.

3 "Others (over-the-air)" include over-the-air channels with a viewing share of ≥ 1.0% (i.e., *ITV2, ITV3, ITV4, BBC Three, BBC Four, CBeebies, C4, E4*, etc.).

4 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

The data show a continuous decline in market shares for the five main terrestrial broadcasters. This can be attributed to the rise of digital cable and satellite subscription channels such as *Sky 1, Sky Sports 1, Sky News, Cartoon Network*, *Nickelodeon*, and so forth, which in 2010 attracted a cumulative audience share of about 30%. It can also be attributed to the changing habits of the public, with the young population spending more time watching programs online or on mobile platforms. In 2010 a British adult spent on average 242 minutes each day watching TV on a television and this number is increasing, but when people are asked which medium they would miss the most if it were taken away, there are clear differences in response by age-group.[10] Overall, 44% said they would most miss their television set—a decline of 6 percentage points from 2009, while 17% said they would most miss the Internet—more than double the proportion five years ago (8%). For young adults aged 16–24, the picture is quite different: 28% said they would most miss mobile the most, and 26% said the Internet, an increase from just 18% in 2009.

Multichannel TV Platforms

Tables 16.6 and 16.7 show the continuing growth of cable, satellite, and digital terrestrial television (DTT) platforms. It is interesting to note the prominence of DTT, which from a mere 4% share in 2000 has since 2011 surpassed satellite and cable to reach 55% of the audience share. This is explained by the popularity of the BBC-led Freeview DTT platform, which is appealing to people who do not wish to subscribe to digital TV services. A total of up to 40 channels are available on Freeview through a set-top box priced at less than US$50 (£30). The ↳ service offers a light but diverse line-up of over-the-air services, and it also offers viewers a package including the existing five terrestrial channels, all the BBC's digital channels, and some of BSkyB's channels. In the satellite TV market, BSkyB enjoys a monopoly, having acquired most of the available premium programming for sports and films, thus leaving little room for new market entrants.

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Table 16-6. Multichannel Video Platforms: Cable MSOs, DBS, IPTV (Market Shares by Revenue), 1992–2011

	1992	1996	2000	2004[1]	2008	2011
BSkyB (News Corp., Murdoch Family, US/AUS)	82.2	71.7	52.0	56.5	36.5	33.0
Satellite Subscribers (1,000)[2]	*1,893*	*3,542*	*3,963*	*6,946*	*8,860*	*11,012*
Virgin Media (US)	17.8	28.3	44.0	26.6	14.0	12.0
Cable Subscribers (1,000)	*409*	*1,399*	*3,352*	*3,277*	*3,406*	*3,997*
BBC Freeview			4.0	16.9	49.5	55.0
DTT Subscribers (1,000)			*303*	*2,075*	*12,017*	*18,376*
Total Revenue (mil £)[3]			3,420	5,313	7,434	9,261
Total Revenue (mil US$)			5,164	9,722	13,827	14,818
Total Subscribers (1,000)	2,302	4,941	7,618	12,298	24,283	33,385
C4[4]	–	–	–	–	–	–
HHI	7,078	5,941	4,658	4,185	3,977	4,261
N (>1%)	2	2	3	3	3	3
Noam Index	5,004	4,200	2,689	2,416	2,296	2,460

Source: Author.

1 From 2002, figures include homes with two or more reception capabilities.

2 Satellite and cable figures include homes on both the analog and digital platform.

3 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

4 C4 cannot be calculated since the platforms are fewer than four.

Table 16-7. Combined Video Network Industries: TV Syndicators, Cable Channels, Pay TV (Market Shares by Revenue), 2002–2011

	2002	2004	2006	2008	2010	2011
News Corp. Ltd. (Murdoch Family, US/AUS)[1]	34.4	34.4	32.8	32.8	32.8	38.4
UK Channel Management (UK)[2]	12.8	13.6	14.4	19.2	19.2	16.8
Viacom (US)[3]	15.2	12.8	16.0	10.4	8.8	7.2
Discovery (US)[4]	6.4	7.2	6.8	6.8	8.0	7.2
Turner Broadcasting (Time Warner, US)[5]	5.6	6.4	4.0	4.0	4.0	4.0
Walt Disney (US)[6]	5.6	5.6	5.6	7.2	6.8	6.4
Other	20.0	20.0	20.0	20.0	20.0	20.0
Total Revenue (mil £)[7]				2,379		3,995
Total Revenue (mil US$)				4,424		6,392
C4	68.4	68.0	70.0	69.6	68.8	69.6
HHI	1,675	1,656	1,633	1,667	1,648	1,917
N (>1%)	6	6	6	6	6	6
Noam Index	684	676	667	681	673	783
Total Non-Broadcasters	13.8	15.0	16.5	14.8	16.0	18.3
Total Broadcasters	86.2	85.0	83.5	85.2	84.0	72.7

Source**:** Broadcasters' Audience Research Board (BARB).

1 *Sky Sports 1, Sky 1, Sky News, Sky Sports 2, Sky Movies Comedy, Sky Movies Action Thriller*, etc.

2 *Alibi, Home, Good Food, Watch*, etc.

3 *Nickelodeon, MTV*, etc.

4 *Animal Planet, Discovery History, Quest*, etc.

5 *Cartoon Network, Boomerang*, etc.

6 *Disney Channel, Disney Cinemagic, Disney Junior*, etc.

7 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

The launch of Freeview in 2002 altered the direction of DTT because it meant that the BBC would not seek to compete directly with established satellite and cable offerings. Meanwhile, digital satellite pay TV platforms—particularly Sky TV—continued to expand their market shares with the offering of "premium content" sports and films.

Digital cable, offered by Virgin Media, is a distant third-place platform for UK audiences. Virgin Media operates its own fiber-optic cable network, the only national cable network in the United Kingdom, which in 2010 had a total of approximately 4.8 million cable customers (4 million of them with broadband Internet services), 4.2 million with fixed-line telephone services, and around 3.1 million mobile customers.

News Corporation has the largest market share in the United Kingdom when it comes to satellite-delivered programming. The company retains the lead largely because of the delivery of the premium Sky Sports channels that show live Premier League as well as Champions League football matches, which are very popular in the United Kingdom. However, the audience share of individual satellite and cable channels remains small compared with the share of the traditional terrestrial broadcasting channels, which have also started to build digital portfolios. For example, in 2011 the BBC had the largest market share in multichannel homes at 33.2%, followed by ITV at 23.1%, Channel 4 at ↳ 11.3%, and Channel 5 at 5.9%. These traditional broadcasters have launched numerous digital channels (for example, *BBC3, BBC4, CBBC, ITV2, ITV3, ITV4, E4,*

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Film4, More4, Channel 5 +1, Five USA, etc.), thus enabling them to get a combined total market share of 73.5% in 2011 for the multichannel market.

Film

Film distributors' market shares fluctuate from year-to-year. The leading distributor in 2010, Warner Brothers, saw its market share increase thanks to films such as *Harry Potter and the Deathly Hallows: Part 1*, *Alice in Wonderland*, and *Inception*. The record-breaking *Avatar*, which was released in late 2009 but which took home most of its US$146 million (£94 million) in 2010, made a significant contribution to putting 20th Century Fox in second place in the UK film market. Paramount was the third highest grossing distributor in the United Kingdom that year, with films such as *Shrek Forever After*, *Iron Man 2*, and *Little Fockers*.

The top 10 distributors had a 94% share of the market in 2010, up from 92% in 2009 but down from 96% in
p. 437 2004. The remaining ↳ 88 distributors handled a total of 379 titles in 2010—62% of the films on release—but gained only a 6% market share. Yet this 6% won by distributors outside of the top 10 in 2010 stands as the second highest share for distributors in this category since 2004. In the last few years, it has ranged from under 3% in 2005 to just below 8% in 2009 (Table 16.8).

Table 16-8. Film Production/Distribution (Market Shares by Box Office %)[1] 2004–2010

	2004	2005	2006	2007	2008	2009	2010
Warner Bros (Time Warner, US)	14.7	18.2	8.2	15.6	11.0	11.2	18.3
20th Century Fox (News Corp., 21st Century Fox, Murdoch Family, US/AUS)	10.7	14.3	20.9	13.9	9.4	16.6	15.9
Paramount (Viacom, US)[2]	—	—	—	14.7	16.9	10.8	14.8
Walt Disney (Walt Disney Company, US)	14.5	13.1	15.7	10.7	9.9	12.4	14.0
Universal (Comcast/GE, US)	—	—	—	13.9	18.5	10.5	10.2
Sony Pictures (Sony, Japan)	10.0	6.8	16.1	8.2	12.5	11.3	6.9
eOne Films (Entertainment One Ltd., Canada/US)	—	—	—	—	—	4.9	5.5
Lions Gate (Lions Gate Entertainment Corporation, US)	1.0	0.3	2.4	2.3	2.5	2.9	3.5
Entertainment (Nigel Green; Entertainment Film Distributors, UK)	7.9	9.4	7.9	9.5	8.0	8.6	2.5
Optimum (Vivendi, France)							2.2
Pathé (Pathé Brothers, France)	2.8	3.4	3.2	1.3	2.1	2.9	
Momentum (Alliance Films, UK)	2.2	1.9	2.3	3.4	3.5		
UIP	29.8	29.1	18.9				
Top Ten Total[3]	96.1	97.3	96.4	94.5	94.5	92.2	93.7
Others	3.9	2.7	3.6	5.5	5.5	7.8	6.3
Total Revenue (mil £)[4]	902				943		1,140
Total Revenue (mil US$)	1,651				1,753		1,767
C4	69.7	74.7	71.6	58.1	57.8	51.5	63.0
HHI	1,605	1,704	1,451	1,136	1,178	1,024	1,208
N (>1%)	9	8	9	10	10	10	10
Noam Index	535	602	483	359	373	323	382

Source: Author; BFI Statistical Yearbook 2011.

1 The British Film Institute (BFI) Statistical Yearbook publishes information on film distributors and exhibitors in the United Kingdom. While the Statistical Yearbook does not publish any data on exhibitors' market shares, in terms of share of box office, it does publish information on distributors' market shares (in terms of total box office receipts).

2 Until 2006, Paramount and Universal distributed jointly as UIP.

3 "Top Ten Total" refers to the top 10 distributors of that particular year.

4 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Radio

The public BBC dominates the UK national radio market, while a plethora of private commercial radio stations operate at the local and regional levels. There are 40 local stations in England, and two national services in Wales, Scotland, and Northern Ireland each (altogether there are 10 national BBC stations), including non-English language stations in Wales and Scotland. There are four national commercial broadcasting stations, and approximately 300 local or regional commercial broadcasters, including Global, Bauer, TLRG, UTV, and GMG. There are 146 community radio stations in the United Kingdom outside of the BBC's jurisdiction, and not-for profit community groups with either a geographical or special interest focus run them. The BBC network has a dominant audience share of 47% and the local BBC stations account for an additional 9%. The national commercial broadcasters account for just 10% of the national market share, while the local/regional commercial broadcasters hold 31% of it.[8]

While in 1996 the BBC and commercial radio had an almost equal market share of 50:50, in more recent years, BBC radio stations have surpassed commercial radio: in 2011, BBC's share had risen to 54.5%. One reason is that the BBC national radio retains the best national FM frequencies, while commercial radio's FM frequencies are predominantly local ones and as such have limited range.

Of the commercial groups, the most popular is Global Radio UK, the largest commercial radio company in the country following the acquisitions of Chrysalis Radio and GCap Media in 2008. In June 2012, Total GMG Radio, the United Kingdom's third-largest radio group, reportedly signed a US$111 million (£70 million) deal with market leader Global Radio UK, strengthening the market position of Global Radio and leaving Bauer Radio (owned by foreign interests) in a distant second place. Table 16.4 does not take account of this development, as at the time of writing a regulatory review into the deal was expected to take place to clear it. GMG, owner of the United Kingdom's third-largest radio group, sold its radio business in 2012 to the market leader, Global Radio. Meanwhile, there is speculation that Bauer Radio will be forced to look at further acquisitions in the radio market in order to remain competitive against Global Radio.

Table 16-4. Radio Groups (Market Shares by Revenue), 1996–2011

	1996	2004	2008	2011	Listeners: 2011 (mil ppl)
BBC	48.9	52.9	55.2	54.5	
BBC Network Radio[1]	—	*42.0*	*46.7*	*46.6*	
BBC Radio One	—	*7.7*	*9.8*	*9.8*	*11.1*
BBC Radio Two	—	*16.0*	*16.5*	*16.5*	*13.6*
BBC Radio Three	—	*1.4*	*1.1*	*1.1*	
BBC Radio Four	—	*11.5*	*12.5*	*19.4*	*10.2*
BBC Radio Five Live	—	*4.4*	*4.5*	*4.5*	*6.5*
Global Radio UK (UK)[2]			17.0	16.3	
Bauer Radio (Germany)[3]			10.9	11.7	
GMG Radio (Guardian Media Group)[4]			4.4	4.5	
Other		11.7	12.5	13.0	
Total Revenue (mil £)[5]		1,559	1,581	1,729	
Total Revenue (mil US$)		2,853	2,941	2,767	
C4			87.5	87.0	
HHI			3,474	3,393	
N (>1%)			4	4	
Noam Index			1,737	1,697	

Source: RAJAR.

1 *BBC Radio Three* is a music station and *BBC Radio Four* is the dominant UK news and talk show service, and its early morning news sequence is regarded as an agenda setter in UK national politics. *BBC Radio One* and *Two* are national pop music stations that have some public service elements. *BBC Radio Five Live* offers sports, news, and talk show content.

2 *Heart Network UK, Classic FM, Capital Network*, and *Gold UK Network*.

3 *Magic UK* and *Kiss UK*.

4 *Smooth Radio UK* and *Real Radio UK*.

5 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Despite the wide availability of other audiovisual platforms, radio remains very popular in the United Kingdom. A survey of RAJAR quarterly listening reports shows that 46.7 million adults tune in each week. The market share of radio via a digital platform stands at 29.1% of all radio listening in 2011, slightly up from 25% in 2010.[9]

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Broadcast Television

The audience share for terrestrial television broadcasting has been declining over the years, owing to multichannel development, audience fragmentation, and changing audience habits. Commercial broadcasters, faced with fragmentation in audience share and diminishing advertising revenues, have begun to experiment with new business models and portfolio expansion.

For example, in October 2005 Channel 4 launched *More4*, which offered current affairs, drama, and comedy programming to the over 35 demographic, while in November 2005, ITV launched *ITV4*, which was targeted at men and broadcast US sports coverage and Hollywood films (in 2004, it had introduced the entertainment channel *ITV3*). In 2006, the terrestrial commercial channel *Five* launched two new digital services: *Five Life*, providing preschool shows, popular lifestyle shows aimed at women, as well as films and soap operas; and *Five USA*, which offers drama, films, sport, comedy, and children's television content from across the Atlantic. Meanwhile, the BBC has launched numerous over-the-air digital channels like *BBC Three, BBC Four, BBC News 24*, and the children-oriented services *CBeebies* and *CBBC*. But apart from a few exceptions, these
p. 434 ventures have not ↳ been successful in winning many new viewers for their networks (Table 16.5).

Table 16-5. TV Broadcasting (Market Shares) 1982–2012

	1982	1986[1]	1990	1994	1998	2002	2004	2006	2008	2010	2012[2]
BBC (One & Two)	50.0	48.0	47.0	44.8	44.5	44.3	41.4	41.6	43.6	42.6	50.1
ITV (GMTV)	50.0	44.0	44.0	40.7	34.5	28.4	27,2	26.0	24.1	25.4	21.8
Channel 4 (S4C)		8.0	9.0	11.5	11.3	11.8	11.6	13.0	11.1	10.0	9.8
Five					4.7	7.4	7.9	7.4	7.5	7.0	3.3
Others (over-the-air)[3]				3.0	5.0	8.0	10.0	12.0	14.0	15.0	15.0
Total Revenue (mil £)[4]					4,446		5,714		7,053	8,136	10,947
Total Revenue (mil US$)					7,381		10,457		13,118	12,611	16,531
C4	100.0	100.0	100.0	97.0	95.0	91.9	88.9	88.0	86.3	85.0	95.0
HHI	5,000	4,304	4,226	3,796	3,320	2,963	2,651	2,630	2,661	2,609	3,092
N (>1%)	2	3	3	3	4	4	4	4	4	4	4
Noam Index	3,536	2,485	2,440	2,191	1,660	1,482	1,326	1,315	1,331	1,305	1,546

Source: Broadcasters' Audience Research Board (BARB). Source: 2012 Ofcom Stakeholders report 2012 updates by editors, with "others" estimated.

1 Shares before 1998 have been rounded to nearest whole number.

2 Affected by Olympic year in London, carried exclusively by BBC.

3 "Others (over-the-air)" include over-the-air channels with a viewing share of ≥ 1.0% (i.e., *ITV2, ITV3, ITV4, BBC Three, BBC Four, CBeebies, C4, E4*, etc.).

4 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

The data show a continuous decline in market shares for the five main terrestrial broadcasters. This can be attributed to the rise of digital cable and satellite subscription channels such as *Sky 1, Sky Sports 1, Sky News, Cartoon Network*, *Nickelodeon*, and so forth, which in 2010 attracted a cumulative audience share of about 30%. It can also be attributed to the changing habits of the public, with the young population spending more time watching programs online or on mobile platforms. In 2010 a British adult spent on average 242 minutes each day watching TV on a television and this number is increasing, but when people are asked which medium they would miss the most if it were taken away, there are clear differences in response by age-group.[10] Overall, 44% said they would most miss their television set—a decline of 6 percentage points from 2009, while 17% said they would most miss the Internet—more than double the proportion five years ago (8%). For young adults aged 16–24, the picture is quite different: 28% said they would most miss mobile the most, and 26% said the Internet, an increase from just 18% in 2009.

Multichannel TV Platforms

Tables 16.6 and 16.7 show the continuing growth of cable, satellite, and digital terrestrial television (DTT) platforms. It is interesting to note the prominence of DTT, which from a mere 4% share in 2000 has since 2011 surpassed satellite and cable to reach 55% of the audience share. This is explained by the popularity of the BBC-led Freeview DTT platform, which is appealing to people who do not wish to subscribe to digital TV services. A total of up to 40 channels are available on Freeview through a set-top box priced at less than US$50 (£30). The p. 435 service offers a light but diverse line-up of over-the-air services, and it also offers viewers a package including the existing five terrestrial channels, all the BBC's digital channels, and some of BSkyB's channels. In the satellite TV market, BSkyB enjoys a monopoly, having acquired most of the available premium programming for sports and films, thus leaving little room for new market entrants.

Table 16-6. Multichannel Video Platforms: Cable MSOs, DBS, IPTV (Market Shares by Revenue), 1992–2011

	1992	1996	2000	2004[1]	2008	2011
BSkyB (News Corp., Murdoch Family, US/AUS)	82.2	71.7	52.0	56.5	36.5	33.0
Satellite Subscribers (1,000)[2]	*1,893*	*3,542*	*3,963*	*6,946*	*8,860*	*11,012*
Virgin Media (US)	17.8	28.3	44.0	26.6	14.0	12.0
Cable Subscribers (1,000)	*409*	*1,399*	*3,352*	*3,277*	*3,406*	*3,997*
BBC Freeview			4.0	16.9	49.5	55.0
DTT Subscribers (1,000)			*303*	*2,075*	*12,017*	*18,376*
Total Revenue (mil £)[3]			3,420	5,313	7,434	9,261
Total Revenue (mil US$)			5,164	9,722	13,827	14,818
Total Subscribers (1,000)	2,302	4,941	7,618	12,298	24,283	33,385
C4[4]	–	–	–	–	–	–
HHI	7,078	5,941	4,658	4,185	3,977	4,261
N (>1%)	2	2	3	3	3	3
Noam Index	5,004	4,200	2,689	2,416	2,296	2,460

Source: Author.

1 From 2002, figures include homes with two or more reception capabilities.

2 Satellite and cable figures include homes on both the analog and digital platform.

3 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

4 C4 cannot be calculated since the platforms are fewer than four.

Table 16-7. Combined Video Network Industries: TV Syndicators, Cable Channels, Pay TV (Market Shares by Revenue), 2002–2011

	2002	2004	2006	2008	2010	2011
News Corp. Ltd. (Murdoch Family, US/AUS)[1]	34.4	34.4	32.8	32.8	32.8	38.4
UK Channel Management (UK)[2]	12.8	13.6	14.4	19.2	19.2	16.8
Viacom (US)[3]	15.2	12.8	16.0	10.4	8.8	7.2
Discovery (US)[4]	6.4	7.2	6.8	6.8	8.0	7.2
Turner Broadcasting (Time Warner, US)[5]	5.6	6.4	4.0	4.0	4.0	4.0
Walt Disney (US)[6]	5.6	5.6	5.6	7.2	6.8	6.4
Other	20.0	20.0	20.0	20.0	20.0	20.0
Total Revenue (mil £)[7]				2,379		3,995
Total Revenue (mil US$)				4,424		6,392
C4	68.4	68.0	70.0	69.6	68.8	69.6
HHI	1,675	1,656	1,633	1,667	1,648	1,917
N (>1%)	6	6	6	6	6	6
Noam Index	684	676	667	681	673	783
Total Non-Broadcasters	13.8	15.0	16.5	14.8	16.0	18.3
Total Broadcasters	86.2	85.0	83.5	85.2	84.0	72.7

Source**:** Broadcasters' Audience Research Board (BARB).

1 *Sky Sports 1, Sky 1, Sky News, Sky Sports 2, Sky Movies Comedy, Sky Movies Action Thriller*, etc.

2 *Alibi, Home, Good Food, Watch*, etc.

3 *Nickelodeon, MTV*, etc.

4 *Animal Planet, Discovery History, Quest*, etc.

5 *Cartoon Network, Boomerang*, etc.

6 *Disney Channel, Disney Cinemagic, Disney Junior*, etc.

7 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

The launch of Freeview in 2002 altered the direction of DTT because it meant that the BBC would not seek to compete directly with established satellite and cable offerings. Meanwhile, digital satellite pay TV platforms —particularly Sky TV—continued to expand their market shares with the offering of "premium content" sports and films.

Digital cable, offered by Virgin Media, is a distant third-place platform for UK audiences. Virgin Media operates its own fiber-optic cable network, the only national cable network in the United Kingdom, which in 2010 had a total of approximately 4.8 million cable customers (4 million of them with broadband Internet services), 4.2 million with fixed-line telephone services, and around 3.1 million mobile customers.

News Corporation has the largest market share in the United Kingdom when it comes to satellite-delivered programming. The company retains the lead largely because of the delivery of the premium Sky Sports channels that show live Premier League as well as Champions League football matches, which are very popular in the United Kingdom. However, the audience share of individual satellite and cable channels remains small compared with the share of the traditional terrestrial broadcasting channels, which have also started to build digital portfolios. For example, in 2011 the BBC had the largest market share in multichannel
p. 436 homes at 33.2%, followed by ITV at 23.1%, Channel 4 at ↳ 11.3%, and Channel 5 at 5.9%. These traditional broadcasters have launched numerous digital channels (for example, *BBC3, BBC4, CBBC, ITV2, ITV3, ITV4, E4,*

Film4, More4, Channel 5 +1, Five USA, etc.), thus enabling them to get a combined total market share of 73.5% in 2011 for the multichannel market.

Film

Film distributors' market shares fluctuate from year-to-year. The leading distributor in 2010, Warner Brothers, saw its market share increase thanks to films such as *Harry Potter and the Deathly Hallows: Part 1*, *Alice in Wonderland*, and *Inception*. The record-breaking *Avatar*, which was released in late 2009 but which took home most of its US$146 million (£94 million) in 2010, made a significant contribution to putting 20th Century Fox in second place in the UK film market. Paramount was the third highest grossing distributor in the United Kingdom that year, with films such as *Shrek Forever After*, *Iron Man 2*, and *Little Fockers*.

The top 10 distributors had a 94% share of the market in 2010, up from 92% in 2009 but down from 96% in
p. 437 2004. The remaining ↳ 88 distributors handled a total of 379 titles in 2010—62% of the films on release—but gained only a 6% market share. Yet this 6% won by distributors outside of the top 10 in 2010 stands as the second highest share for distributors in this category since 2004. In the last few years, it has ranged from under 3% in 2005 to just below 8% in 2009 (Table 16.8).

Table 16-8. Film Production/Distribution (Market Shares by Box Office %)[1] 2004–2010

	2004	2005	2006	2007	2008	2009	2010
Warner Bros (Time Warner, US)	14.7	18.2	8.2	15.6	11.0	11.2	18.3
20th Century Fox (News Corp., 21st Century Fox, Murdoch Family, US/AUS)	10.7	14.3	20.9	13.9	9.4	16.6	15.9
Paramount (Viacom, US)[2]	—	—	—	14.7	16.9	10.8	14.8
Walt Disney (Walt Disney Company, US)	14.5	13.1	15.7	10.7	9.9	12.4	14.0
Universal (Comcast/GE, US)	—	—	—	13.9	18.5	10.5	10.2
Sony Pictures (Sony, Japan)	10.0	6.8	16.1	8.2	12.5	11.3	6.9
eOne Films (Entertainment One Ltd., Canada/US)	—	—	—	—	—	4.9	5.5
Lions Gate (Lions Gate Entertainment Corporation, US)	1.0	0.3	2.4	2.3	2.5	2.9	3.5
Entertainment (Nigel Green; Entertainment Film Distributors, UK)	7.9	9.4	7.9	9.5	8.0	8.6	2.5
Optimum (Vivendi, France)							2.2
Pathé (Pathé Brothers, France)	2.8	3.4	3.2	1.3	2.1	2.9	
Momentum (Alliance Films, UK)	2.2	1.9	2.3	3.4	3.5		
UIP	29.8	29.1	18.9				
Top Ten Total[3]	96.1	97.3	96.4	94.5	94.5	92.2	93.7
Others	3.9	2.7	3.6	5.5	5.5	7.8	6.3
Total Revenue (mil £)[4]	902				943		1,140
Total Revenue (mil US$)	1,651				1,753		1,767
C4	69.7	74.7	71.6	58.1	57.8	51.5	63.0
HHI	1,605	1,704	1,451	1,136	1,178	1,024	1,208
N (>1%)	9	8	9	10	10	10	10
Noam Index	535	602	483	359	373	323	382

Source: Author; BFI Statistical Yearbook 2011.

1 The British Film Institute (BFI) Statistical Yearbook publishes information on film distributors and exhibitors in the United Kingdom. While the Statistical Yearbook does not publish any data on exhibitors' market shares, in terms of share of box office, it does publish information on distributors' market shares (in terms of total box office receipts).

2 Until 2006, Paramount and Universal distributed jointly as UIP.

3 "Top Ten Total" refers to the top 10 distributors of that particular year.

4 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Wireline Telecom

The UK telecom market, one of the largest in Europe, is characterized by fierce competition in the mobile
p. 438 and broadband sectors and by an innovative broadcast sector that has pioneered ↳ business models for digital distribution. As a consequence, mobile and broadband penetration is well ahead of the EU average, while competition in the wireline sector is driving prices down for UK consumers. Mobile communications' share of total telecoms revenue has, as of 2004, been larger than that of fixed lines, and DSL is now almost universal in the country, while Internet coverage (both at work and at home) has reached 79.8% of the population.[11] Digital television is universal as digital switchover occurred in December 2012, and digital radio (DAB) is beginning to make inroads. Consumer prices across the board have fallen steadily, while network capabilities have been greatly expanded following recent investments by British Telecom (BT) and Virgin Media in Next Generation Network (NGN) infrastructure. To comprehend the enormity of the developments one should bear in mind that in the 1990s, most UK households only had access to a basic landline, five TV channels, and their radio service on a set.

British Telecom (BT) dominates wireline services, but it is losing market share. Although historically the telecom sector in the United Kingdom has been driven by growth in basic fixed telephone services, growth has become concentrated more recently in broadband and mobile. The decline in traditional fixed telephone market represents a business challenge to BT, which in the past has relied on those services as its most stable revenue stream. BT's market revenue for all fixed call volumes fell from US$10.7 billion (£5.9 billion) in 2005 to US$6.5 billion (£4.2 billion) in 2010. In the same period, BT's market share fell from 64% to just above 50%, whereas the market shares of Virgin Media and other wireline telecom firms have increased.

Virgin Media provides quadruple services—fixed and mobile telephone, television, and broadband Internet—to UK consumers. In 2006, Virgin Media entered into a licensing agreement with Sir Richard Branson's Virgin Group Limited to license out all the relevant Virgin sub-brands for a term of 30 years, with a 10-year opt-out clause. Branson accepted a mix of shares and cash, making him a 10.7% shareholder of the combined company at the time. However, now that it is listed on NASDAQ and the London Stock Exchange, Sir Richard Branson's Virgin Entertainment Investment Holdings stake has fallen to 5.5% (Table 16.9).[12]

Table 16-9. Wireline Telecom (Market Shares By Revenue)[1] 2005–2012

	2005	2006	2007	2008	2009	2010	2012
British Telecom (BT)	64.0	61.0	60.0	58.0	55.0	51.0	43,8
Virgin Media	13.0	12.0	12.0	11.0	12.0	12.0	14.6
British Sky Broadcasting Group PLC							12.7
Others[2]	23.0	27.0	28.0	31.0	33.0	37.0	29.0
Total Revenue (bil £)	10,834	10,865	11,662	10,655	8,582	8,178	8,500
Total Revenue (bil US$)	19,718	19,992	23,324	19,819	13,474	12,676	13,469
C4	77.0	73.0	72.0	69.0	67.0	63.0	71.1
HHI	4,283	3,933	3,749	3,540	3,196	2,772	2,293
N (>1%)	2	2	2	2	2	2	3
Noam Index	3,029	2,781	2,651	2,503	2,260	1,960	1,324

Source: Ofcom, 2011 Source: Ofcom, 2013 report for 2012 numbers 2012 updates by editors

1 Includes estimates where Ofcom does not receive data from operators; excludes revenues from NTS voice calls.

2 "Others" includes Talk-Talk, Sky Talk, O2, Tiscali, Post Office, Orange, Pipex Home Call, Kingston Communications, Tesco Home Phone and Vodafone. Bainbridge, Jane. "Sector Insight: Fixed-line telecoms." *Brand Republic*, May 20, 2011. July 14, 2012. <http://www.brandrepublic.com/analysis/1070132>.

[3] This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Wireless Telecom

In contrast to the UK wireline telecom market, which has been characterized by a BT monopoly, the UK's wireless telecom market has been much more competitive. Outside of the new 3G operator, 3UK, before 2010 the other four operators—O2, Vodafone, T-Mobile, and Orange—had roughly equivalent market shares. However, concentration rose when Orange and T-Mobile merged in 2010 under a new company named Everything Everywhere (EE), owned jointly (50:50) by Deutsche Telekom and France Telecom (Table 16.10).

Table 16-10. Wireless Telecom (Market Shares By Revenue), 2005–2012

	2005	2008	2010	2012
O2 (Telefónica, Spain)	22.0	25.2	28.0	29.0
Vodafone	21.5	25.4	23.0	28.0
Everything Everywhere (EE)	0.0	0.0	43.0	34.0
T-Mobile (Deutsch Telekom, Germany)	16.5	20.0		
Orange (France Telecom, France)	17.0	25.0		
3UK	2.3	4.5	6.0	9.0
Others	20.7	0.0	0.0	0.0
Total Revenue (mil £)[1]	13,714	18,898	21,219	19,570
Total Revenue (mil US$)	24,960	35,151	32,890	32,210
C4	77.0	95.6	100	100
HHI	1,513	2,325	3,198	2,862
N (>1%)	5	5	4	4
Noam Index	677	1,040	1,599	1,431

Source**:** Ofcom, 2010; 2011, 2012. 2012 update provided by editors.

1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

A 2011 report by Ofcom highlights some of the key trends emerging in 2011 regarding both the wireline and wireless sectors.[13] In particular, BT's share of total fixed and mobile voice call volumes fell to 19.4% in 2010, while mobile's share increased to 49.2%, making it likely that more than half of UK voice calls will come from mobile platforms in the next few years. BT's share of fixed voice call volumes also fell to under 40% for the first time in 2011. Meanwhile, total fixed Internet revenues were US$4.7 billion (£3 billion) in 2010, down from US$5 billion (£3.2 billion) in 2009. This decline was primarily the result of falling residential broadband prices. In addition, the decline in the number of fixed lines for businesses accelerated in 2010, p. 439 falling by 5.2% (Table 16.11). ↳

Table 16-11. Total UK Wireline & Wireless Telecom (Market Shares by %)[1] 2005–2012

	2005	2006	2007	2008	2009	2010	2012
3UK Mobile	3.5	3.6	3.7	4.1	4.3	4.9	6.3
Everything Everywhere (EE)	30.0	30.9	30.5	29.9	29.8	27.2	24.0
Orange (France Telecom, France)	14.8	14.7	14.5	14.8	14.8		
T-Mobile (Deutsch Telekom, Germany)	15.2	16.2	16.0	15.1	15.0		
O2 Mobile (Telefónica, Spain)	16.9	18.2	18.5	19.3	19.6	21.2	20.4
Vodafone Mobile	15.1	14.3	15.5	15.9	16.5	17.5	19.7
Virgin Media (fixed)	4.9	4.5	4.2	4.3	4.2	4.3	4.3
British Telecom (BT) (fixed)	26.2	23.1	21.2	19.2	16.5	14.9	13.8
British Sky Broadcasting (fixed)							3.7
Others (fixed)[2]	3.6	5.4	6.4	7.3	9.2	10.0	8.6
C4	73.4	72.2	71.2	69.5	67.6	80.8	77.9
HHI	1,699	1,610	1,570	1,530	1,493	1,860	1,851
N (>1%)	8	8	8	8	8	7	7
Noam Index	601	569	555	541	528	703	702

Source: Ofcom, 2011.

1 Includes estimates where Ofcom does not receive data from operators. MVNOs and mobile service provider connections are included within the network operator figures.

2 “Others (fixed)” includes carrier preselection and wholesale line rental in addition to other licensed operators.

Telecommunications Media

Wireline Telecom

The UK telecom market, one of the largest in Europe, is characterized by fierce competition in the mobile and broadband sectors and by an innovative broadcast sector that has pioneered ↳ business models for digital distribution. As a consequence, mobile and broadband penetration is well ahead of the EU average, while competition in the wireline sector is driving prices down for UK consumers. Mobile communications’ share of total telecoms revenue has, as of 2004, been larger than that of fixed lines, and DSL is now almost universal in the country, while Internet coverage (both at work and at home) has reached 79.8% of the population.[11] Digital television is universal as digital switchover occurred in December 2012, and digital radio (DAB) is beginning to make inroads. Consumer prices across the board have fallen steadily, while network capabilities have been greatly expanded following recent investments by British Telecom (BT) and Virgin Media in Next Generation Network (NGN) infrastructure. To comprehend the enormity of the developments one should bear in mind that in the 1990s, most UK households only had access to a basic landline, five TV channels, and their radio service on a set.

British Telecom (BT) dominates wireline services, but it is losing market share. Although historically the telecom sector in the United Kingdom has been driven by growth in basic fixed telephone services, growth has become concentrated more recently in broadband and mobile. The decline in traditional fixed telephone market represents a business challenge to BT, which in the past has relied on those services as its most stable revenue stream. BT’s market revenue for all fixed call volumes fell from US$10.7 billion (£5.9 billion) in 2005 to US$6.5 billion (£4.2 billion) in 2010. In the same period, BT’s market share fell from 64% to just above 50%, whereas the market shares of Virgin Media and other wireline telecom firms have increased.

Virgin Media provides quadruple services—fixed and mobile telephone, television, and broadband Internet—to UK consumers. In 2006, Virgin Media entered into a licensing agreement with Sir Richard Branson's Virgin Group Limited to license out all the relevant Virgin sub-brands for a term of 30 years, with a 10-year opt-out clause. Branson accepted a mix of shares and cash, making him a 10.7% shareholder of the combined company at the time. However, now that it is listed on NASDAQ and the London Stock Exchange, Sir Richard Branson's Virgin Entertainment Investment Holdings stake has fallen to 5.5% (Table 16.9).[12]

Table 16-9. Wireline Telecom (Market Shares By Revenue)[1] 2005–2012

	2005	2006	2007	2008	2009	2010	2012
British Telecom (BT)	64.0	61.0	60.0	58.0	55.0	51.0	43,8
Virgin Media	13.0	12.0	12.0	11.0	12.0	12.0	14.6
British Sky Broadcasting Group PLC							12.7
Others[2]	23.0	27.0	28.0	31.0	33.0	37.0	29.0
Total Revenue (bil £)	10,834	10,865	11,662	10,655	8,582	8,178	8,500
Total Revenue (bil US$)	19,718	19,992	23,324	19,819	13,474	12,676	13,469
C4	77.0	73.0	72.0	69.0	67.0	63.0	71.1
HHI	4,283	3,933	3,749	3,540	3,196	2,772	2,293
N (>1%)	2	2	2	2	2	2	3
Noam Index	3,029	2,781	2,651	2,503	2,260	1,960	1,324

Source: Ofcom, 2011 Source: Ofcom, 2013 report for 2012 numbers 2012 updates by editors

1 Includes estimates where Ofcom does not receive data from operators; excludes revenues from NTS voice calls.

2 "Others" includes Talk-Talk, Sky Talk, O2, Tiscali, Post Office, Orange, Pipex Home Call, Kingston Communications, Tesco Home Phone and Vodafone. Bainbridge, Jane. "Sector Insight: Fixed-line telecoms." *Brand Republic*, May 20, 2011. July 14, 2012. <http://www.brandrepublic.com/analysis/1070132>.

[3] This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Wireless Telecom

In contrast to the UK wireline telecom market, which has been characterized by a BT monopoly, the UK's wireless telecom market has been much more competitive. Outside of the new 3G operator, 3UK, before 2010 the other four operators—O2, Vodafone, T-Mobile, and Orange—had roughly equivalent market shares. However, concentration rose when Orange and T-Mobile merged in 2010 under a new company named Everything Everywhere (EE), owned jointly (50:50) by Deutsche Telekom and France Telecom (Table 16.10).

Table 16-10. Wireless Telecom (Market Shares By Revenue), 2005–2012

	2005	2008	2010	2012
O2 (Telefónica, Spain)	22.0	25.2	28.0	29.0
Vodafone	21.5	25.4	23.0	28.0
Everything Everywhere (EE)	0.0	0.0	43.0	34.0
T-Mobile (Deutsch Telekom, Germany)	16.5	20.0		
Orange (France Telecom, France)	17.0	25.0		
3UK	2.3	4.5	6.0	9.0
Others	20.7	0.0	0.0	0.0
Total Revenue (mil £)[1]	13,714	18,898	21,219	19,570
Total Revenue (mil US$)	24,960	35,151	32,890	32,210
C4	77.0	95.6	100	100
HHI	1,513	2,325	3,198	2,862
N (>1%)	5	5	4	4
Noam Index	677	1,040	1,599	1,431

Source**:** Ofcom, 2010; 2011, 2012. 2012 update provided by editors.

1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

A 2011 report by Ofcom highlights some of the key trends emerging in 2011 regarding both the wireline and wireless sectors.[13] In particular, BT's share of total fixed and mobile voice call volumes fell to 19.4% in 2010, while mobile's share increased to 49.2%, making it likely that more than half of UK voice calls will come from mobile platforms in the next few years. BT's share of fixed voice call volumes also fell to under 40% for the first time in 2011. Meanwhile, total fixed Internet revenues were US$4.7 billion (£3 billion) in 2010, down from US$5 billion (£3.2 billion) in 2009. This decline was primarily the result of falling residential broadband prices. In addition, the decline in the number of fixed lines for businesses accelerated in 2010, p. 439 falling by 5.2% (Table 16.11). ↳

Table 16-11. Total UK Wireline & Wireless Telecom (Market Shares by %)[1] 2005–2012

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Everything Everywhere (EE)	30.0	30.9	30.5	29.9	29.8	27.2	24.0
Orange (France Telecom, France)	14.8	14.7	14.5	14.8	14.8		
T-Mobile (Deutsch Telekom, Germany)	15.2	16.2	16.0	15.1	15.0		
O2 Mobile (Telefónica, Spain)	16.9	18.2	18.5	19.3	19.6	21.2	20.4
Vodafone Mobile	15.1	14.3	15.5	15.9	16.5	17.5	19.7
Virgin Media (fixed)	4.9	4.5	4.2	4.3	4.2	4.3	4.3
British Telecom (BT) (fixed)	26.2	23.1	21.2	19.2	16.5	14.9	13.8
British Sky Broadcasting (fixed)							3.7
Others (fixed)[2]	3.6	5.4	6.4	7.3	9.2	10.0	8.6
C4	73.4	72.2	71.2	69.5	67.6	80.8	77.9
HHI	1,699	1,610	1,570	1,530	1,493	1,860	1,851
N (>1%)	8	8	8	8	8	7	7
Noam Index	601	569	555	541	528	703	702

Source: Ofcom, 2011.

1 Includes estimates where Ofcom does not receive data from operators. MVNOs and mobile service provider connections are included within the network operator figures.

2 "Others (fixed)" includes carrier preselection and wholesale line rental in addition to other licensed operators.

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Internet Media

Internet Service Providers (ISPs)

In the past few decades, ISPs have gone through numerous mergers and acquisitions. However, there are currently a fair number of ISPs on the market, and the competition between them has reduced prices substantially. UK users can now buy high-speed broadband packages (up to 50 MB of broadband) combined with other services for under US$16 (10£) per month (Table 16.12).

Table 16-12. Internet Service Providers (Market Shares by Revenue) 2004–2012

	2004	2006	2009	2012
British Telecom (BT) Broadband	27.2	23.1	25.8	29.6
Virgin Media	21.4	26.3	21.8	20.8
Carphone Warehouse (UK)[1]	18.6	22.2	25.2	—
Talk-Talk (UK)[2,3]	7.5	10.1	10.0	17.0
Sky Broadband (News Corp., Murdoch Family, US/UK/AUS)[4]	—	—	11.0	19.4
Orange (France Telecom, France)	9.3	9.2	5.75	3.0
Cable and Wireless Worldwide (UK)[5]	1.5	1.2	—	—
Others	22.0	18.0	10.5	8.0
Total Revenue (mil £)[6]	3,822	4,832	7,070	7,300
Total Revenue (mil US$)	6,994	8,890	11,100	11,563
C4	76.5	80.8	83.8	86.8
HHI	1,633	1,804	1,930	1,983
N (>1%)	5	5	5	5
Noam Index	730	807	863	887

Source: Ofcom, 2010 Source Ofcom, 2013 for 2012. 2012 updates provided by editors.

1 Includes AOL.

2 Includes Tiscali.

3 Talk-Talk was a subsidiary of Carphone Warehouse until 2010 when Carphone demerged their telecom business. http://www.reuters.com/article/2010/03/29/us-best-buy-carphone-idUSTRE62S1OK20100329.

4 News International operates as an ISP through Sky Broadband, which was founded in 2006. The first available market share was in 2007—which is why Sky's market share in 2004 was 0%, but went up to 11% in 2009.

5 In 2010, Cable & Wireless PLC became Cable & Wireless Worldwide and in June 2012 Vodafone acquired the UK-based company.

6 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Search Engines

In terms of market share, Google dominates this sector, as it does in most other highly industrialized countries. But in the United Kingdom, Google's market share is even stronger than it is in the United States, where it originated: it controlled 90.7% of all UK web traffic in January 2011.[14] In a very distant second and third place are Bing (formerly MSN) and Yahoo!, both of which are losing market share (Table 16.13).

Table 16-13. Internet Search Engines (Market Shares by Revenue), 2007–2011

	2007	2009	2011
Google (US)	77.0	88.7	90.7
Yahoo! (US)	8.0	5.5	2.9
MSN (US)	5.0	—	—
Bing (US)	—	2.9	3.9
Ask (US)	5.0	—	1.3
Others	5.0	2.9	1.3
Total Revenue (mil £)[1]	375	1,311	1,406
Total Revenue (mil US$)	750	2,058	2,250
C4	95.0	97.1	98.7
HHI	6,043	7,914	8,248
N (>1%)	5	4	5
Noam Index	2,703	3,956	3,689

Source: Intraspin.com, 2007; Koozai, 2009; 2011.

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Online News

Established newspapers and television broadcasters dominate the online news media sector, leaving little room for newcomers. Despite the lead the BBC has here, newspapers also have large online market shares. Over the past decade, there has been a fast-growing online market worldwide, attracting even larger audiences from outside the United Kingdom. News websites have seen a decline in domestic readership, but they have compensated by winning new readers abroad. Overall traffic for established news sites run by the BBC, News International, and ITV has shown a slight decline in recent years, owing to competition abroad in the English-language news market (Table 16.14).

Table 16-14. Online News Media (Market Shares by Revenue), 2007–2011

	2007	2009	2011
BBC (public)	35.0	34.0	32.0
News International (News Corp., Murdoch Family, UK/US/AUS)[1]	19.2	19.0	18.0
ITV (ITV plc)	9.0	8.5	8.0
Guardian.co.uk (Guardian Media Group)	7.5	7.0	7.0
Mail Online (Daily Mail & General Trust)	6.0	6.0	6.1
Channel 4 (Channel Four Television Corporation)	4.0	4.0	4.0
Mirror Group Digital (Trinity Mirror plc)	2.2	2.0	1.8
Telegraph Group (Barclay Brothers)	1.8	1.8	1.7
Independent.co.uk (Independent Print Ltd, Alexander Lebedev)	0.9	0.8	0.8
Others	14.4	16.9	20.6
Total Revenue (mil £)[2]	375	656	956
Total Revenue (mil US$)	750	1,030	1,530
C4	70.7	68.5	65.0
HHI	1,829	1,736	1,559
N (>1%)	8	8	8
Noam Index	647	614	551

Source: Author, Audit Bureau of Circulations Electronic.

1 Skynews.com, The Sun Online, and Times Online.

2 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

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Conclusion

In 2009, Ofcom submitted a set of recommendations to the UK Secretary of State concerning local media ownership rules, which were eventually approved.[15]

p. 442 The recommendations consisted mostly of relaxing and simplifying the radio ownership rules and abolishing most of the local rules concerning radio and cross-media ownership. Ofcom's rationale was that given the financial pressures that radio stations face, relaxing regulations may provide opportunities to make them more viable by letting them go under common ownership. Ofcom further justified this position by reporting that a majority of consumers are not opposed to single ownership in radio, so long as they have an alternative source from their local BBC station.

Ofcom also recommended greater liberalization of local cross-media ownership rules, so that the only restriction would be on ownership of three media sources at the same time: local newspapers (with 50% plus local market share), a local radio station, and the regional *Channel 3* license were set as the maximum concentration limits.

Meanwhile, Ofcom advised the government to retain the national cross-media ownership rules. Despite the rise of the Internet and the growth of digital media as a news source, TV remains an important source of news, and newspapers retain an important role in setting the news agenda. Ofcom concluded that there have not yet been such significant changes in the solvency of national media outlets to warrant a relaxation of the anticoncentration measures here.

Ofcom further recommended retaining the restrictions on withholding broadcast licenses in order to continue protecting consumers against undue influence through television and radio by certain owners (i.e., political parties and religious groups).

Ofcom has suggested retaining the appointed news provider rule as well, which aims to ensure that the provision of national and international news to ITV plc is independent of the BBC. This is because *ITV1* remains the most watched source of broadcast news after the BBC, exactly as it was when the rules were liberalized with the Communications Act (2003).[16]

p. 443 With regard to the broadcasting market, the British public has been well served by the mixed economy of a public broadcaster, a regulated private sector, and the arrival of satellite and cable broadcasters.[17] The television market is among the most mature and dynamic in the European Union (EU), consisting of traditional broadcasters with public service obligations that offer high-quality, diverse programs that are universally accessible, as well as digital terrestrial, cable, and satellite channels. Despite the shift toward a more deregulated commercial broadcast market, there is a determination to retain the public service principles that have long shaped British television. This is evidenced by the establishment of the Content Board, a committee of the main Ofcom Board, which will serve as Ofcom's primary forum for the regulation of quality and standards in the broadcasting industry. Support for public service principles is also evidenced by the government's continued support for the BBC in an increasingly crowded marketplace, though it has asked BBC to cut back services and licensing fees. However, independent media critics will continue to argue that technological and regulatory changes have affected the emphasis and character of the programming of both public and private terrestrial ↳ channels, which now provide less pluralistic, less distinctive, and less diverse output. p. 444

Satellite and cable television channels are also more widely available, but they are not subject to public service obligations. BSkyB, set up in 1990, dominates the satellite TV market with more than 12 million subscribers. The cable TV market developed in the late 1980s with the entry of numerous networks, but in 2006 only two providers had prevailed, NTL and Telewest, who then merged into Virgin Media. A further merger with Virgin Mobile UK in July 2006 created the first "quadruple-play" media company in the United Kingdom, offering TV, Internet, mobile phone, and fixed-line telephone services. Here, Britain stands as an EU leader in the rollout of digital television services. Following the collapse of the pay-DTT consortium ITV Digital in April 2002, the BBC consortium Freeview was launched in late 2002, and in less than a decade it has attracted more than 14 million households by offering free-to-air digital services. At the end of 2012, 100% of the UK households had access to digital TV via terrestrial, satellite, cable, or Digital Subscriber Lines (DSL).

The main point of discussion with regard to UK media concentration will continue to be centered around Rupert Murdoch's media properties, though because the BBC is a powerful player in radio, terrestrial TV, and digital and online services, there will also be many voices (mainly from commercial operators) demanding the government curb its expansion efforts in the online market.

The Communications Act (2003) is the main piece of legislation governing British media. However, the existing law is inefficient in preventing concentration; in fact, it opened the door wide open for more concentration and cross-ownership in the traditional industries like newspapers and broadcasting. This is because it has abolished strict media and cross-media ownership rules, placed greater emphasis on "self-regulation," and made it easier for foreign interests to own UK media companies. As these policies are likely to prevail, the concentration in many industries, especially newspapers, will continue to increase in the coming years, although there are signs that the UK government may adopt a tougher line toward News International in the wake of "Hackgate."

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p. 443 With regard to the broadcasting market, the British public has been well served by the mixed economy of a public broadcaster, a regulated private sector, and the arrival of satellite and cable broadcasters.[17] The television market is among the most mature and dynamic in the European Union (EU), consisting of traditional broadcasters with public service obligations that offer high-quality, diverse programs that are universally accessible, as well as digital terrestrial, cable, and satellite channels. Despite the shift toward a more deregulated commercial broadcast market, there is a determination to retain the public service principles that have long shaped British television. This is evidenced by the establishment of the Content Board, a committee of the main Ofcom Board, which will serve as Ofcom's primary forum for the regulation of quality and standards in the broadcasting industry. Support for public service principles is also evidenced by the government's continued support for the BBC in an increasingly crowded marketplace, though it has asked BBC to cut back services and licensing fees. However, independent media critics will continue to argue that technological and regulatory changes have affected the emphasis and character of the programming of
p. 444 both public and private terrestrial ↳ channels, which now provide less pluralistic, less distinctive, and less diverse output.

Satellite and cable television channels are also more widely available, but they are not subject to public service obligations. BSkyB, set up in 1990, dominates the satellite TV market with more than 12 million subscribers. The cable TV market developed in the late 1980s with the entry of numerous networks, but in 2006 only two providers had prevailed, NTL and Telewest, who then merged into Virgin Media. A further merger with Virgin Mobile UK in July 2006 created the first "quadruple-play" media company in the United Kingdom, offering TV, Internet, mobile phone, and fixed-line telephone services. Here, Britain stands as an EU leader in the rollout of digital television services. Following the collapse of the pay-DTT consortium ITV Digital in April 2002, the BBC consortium Freeview was launched in late 2002, and in less than a decade it has attracted more than 14 million households by offering free-to-air digital services. At the end of 2012, 100% of the UK households had access to digital TV via terrestrial, satellite, cable, or Digital Subscriber Lines (DSL).

The main point of discussion with regard to UK media concentration will continue to be centered around Rupert Murdoch's media properties, though because the BBC is a powerful player in radio, terrestrial TV, and digital and online services, there will also be many voices (mainly from commercial operators) demanding the government curb its expansion efforts in the online market.

The Communications Act (2003) is the main piece of legislation governing British media. However, the existing law is inefficient in preventing concentration; in fact, it opened the door wide open for more concentration and cross-ownership in the traditional industries like newspapers and broadcasting. This is because it has abolished strict media and cross-media ownership rules, placed greater emphasis on "self-regulation," and made it easier for foreign interests to own UK media companies. As these policies are likely to prevail, the concentration in many industries, especially newspapers, will continue to increase in the coming years, although there are signs that the UK government may adopt a tougher line toward News International in the wake of "Hackgate."

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United Kingdom—Data Summaries

MEDIA CONCENTRATION IN THE United Kingdom is among the lowest in the world. Weighted Average HHI, while high in an antitrust sense, were low compared to other countries, at 2,871. However, it has grown in recent years (Table 16.15)

Table 16-15. National Media Industries Concentration in the United Kingdom

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Share of the Overall National Media Market (%)
Murdoch	448.6	10.5	810.6	16.4	11.5	0.9
BT Group	825.6	13.9	288.9	7.5		–0.9
EE (T-Mobile, Germany + Orange)						
(France)[1]	0.0	0.0	299.9	9.1	N/A	1.3
T-Mobile (Deutsche Telekom, Germany)	65.3	4.0	*0*	*0*	–14.3	–0.6
Orange (France Telecom, France)	75.1	4.7	*0.0*	*0.0*		–0.7
Telefónica (O2, Spain)	116.1	5.3	217.6	7.5	12.5	0.3
BBC (public)	287.1	7.3	431.6	9.7		0.3
Vodafone	110.8	5.2	202.8	7.2	11.9	0.3
Liberty (US)	0.0	0.0	142.4	6.5	N/A	0.9
Google (US)	42.7	0.6	148.7	1.6	35.4	0.16
Daily Mail and General Trust	31.8	1.7	33.4	1.6	0.8	–0.02
Penguin Random House (Germany/UK)[1]	0.0	0.0	300.4	1.2	N/A	0.17
Pearson (UK)	14.4	1.6	4.0	0.7	–10.3	–0.1
Bertelsmann (Germany)	14.2	0.9	0.0	0.0	–14.3	–0.13
ITV	74.9	2.8	63.9	3.0	–2.1	0.03
Bauer (Germany)	22.1	1.3	42.2	1.8	12.9	0.06
Trinity Mirror plc	37.6	1.9	16.3	1.1	–8.1	–0.1
Lagardère (France)	17.1	1.0	9.5	0.7	–6.4	–0.05
Hearst (US)	10.6	0.8	13.0	0.9	3.2	0.01
Total Global Radio	7.9	0.5	5.9	0.4	–3.6	–0.02
Channel 4	13.6	1.2	13.0	1.4	–0.7	–0.02
Viacom (US)	8.2	0.8	7.4	1.1	–1.43	0.05
Sony (Japan)	1.6	0.2	0.68	0.1	–8.2	–0.01

Time Warner (US)	27.4	1.5	5.6	0.5	−11.4	−0.16
Disney (US)	5.5	0.5	4.9	0.5		−0.001
The Guardian	1.8	0.5	1.5	0.4	−2.4	−0.01
Condé Nast (Advance, US)	1.3	0.3	1.0	0.2	−4.4	−0.007
Northern & Shell	17.5	1.3	12.1	1.0	−4.5	−0.05
Virgin Media[2]	129.4	6.4	0.0	0.0	−14.3	−0.9

Media Concentration Index	**2004/5**	**2011 or Most Recent**	**% Change Annual Average**
Total Revenue: Nat’l Media Industry (mil US$)	104,098	124,510	2.0%
Total Voices (*n*)	65	67	0.4%
Net Voices (*n*)	43	46	1.0%
Public Ownership (%)	7.3	9.7	0.3%
Foreign Ownership (%)	33.7	52.1	2.6%
C4 Average—Weighted	76.7	85.2	1.2%
HHI Average—Weighted	2,597	2,871	1.5%
C1 Average—Weighted	37.7	41.6	0.0%
Noam Index Average—Weighted	1,000	1,242	3.5%
Pooled Overall Sector C4	38.2	42.7	0.6%
Pooled Overall Sector HHI	520	689	4.6%
Pooled Overall Sector Noam Index	103	123	2.8%
Market Share of Top Ten Companies: Nat’l Media Industry (%) (Pooled C10)	61.9	71	1.3%
National Power Index	2,429	2,888	2.7%

1 Book publishing only.

2 Bought out by Liberty in 2013.

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Public ownership of media in the United Kingdom is relatively low, at 9.7%, mostly through the BBC. The BBC accounts for 50% of TV broadcasting, 10% of magazines, 55% of radio, and 32% of online news media, making it one of the most diverse content media companies in the United Kingdom. Of the companies solely involved in content media, it is the largest by overall national market share with 9.7%, and it holds 20.8% of content (Table 16.16)

Table 16-16. Top Content Media Companies in the United Kingdom

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	**Company Share of the National Content Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Content Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Content Media Market (%)**
Murdoch Interests (US)	564.3	15.7	769.5	16.7	5.2	0.14
BBC (public)	637.3	16.7	926.4	20.8	6.5	0.6
Google (US)	96.9	1.3	319.1	3.5	32.8	0.3
Daily Mail and General Trust	72.1	3.9	71.8	3.5	–0.05	–0.07
ITV	169.8	6.3	137.1	6.4	–2.8	0.01
Penguin Random House (Germany/UK)[1]	0.0	0.0	65.3	2.6	N/A	0.38
Pearson (UK)	32.6	3.6	8.7	1.4	–10.5	–0.3
Bertelsmann (Germany)	32.2	2.1	0.0	0.0	–14.3	–0.3
Time Inc. (US)	0.0	0.0	60.2	2.7	N/A	0.4
Liberty (US)[2]	0.0	0.0	56.1	2.1	N/A	0.3
Bauer (Germany)	50.2	3.1	90.6	3.8	11.5	0.1
Trinity Mirror	85.3	4.3	35.0	2.4	–8.4	–0.3
Northern & Shell	39.8	2.9	25.9	2.0	–5.0	–0.1
Lagardere (France)	38.8	2.3	20.3	1.5	–6.8	–0.1
Total Global Radio	18.0	1.1	12.7	0.8	–4.2	–0.04
Viacom (US)	18.7	1.7	15.9	2.4	–0.02	0.01
Virgin Media	49.8	1.9	0.0	0.0	–14.3	–0.3

Media Concentration Index	**2004/5**	**2011 or Most Recent**	**% Change Annual Average**
Public Ownership (%)	16.7	20.8	0.59%
Foreign Ownership (%)	35.7	40.9	0.74%
C4 Average—Weighted	74.2	77.7	0.5%
HHI Average—Weighted	2,201	2,674	3.1%
C1 Average—Weighted	34	43	1%
National Power Index	2,061	2,711	4.5%

1 Book publishing only.

2 Liberty bought out Virgin Media in 2013.

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Since the 1980s, a relaxation on foreign direct investment has led to an increase in foreign ownership of national media industries (52.1% of all properties are foreign owned). Murdoch's 21st Century Fox (US) is the most active and expansionary of these foreign-owned firms. News Corp. is also the major newspaper firm. Its controlling owner, Rupert Murdoch, moved first to London from his native Australia and created a significant print and political presence. He then moved control of the company to New York. Following public controversies, News Corp. split itself in 2013 into News Corp. and 21st Century Fox. These two firms had 8.1% and 11.5% share of content, respectively. 21st Century Fox is the third-largest media company in the United Kingdom based on Sky, which it controls (Table 16.16).

Traditionally, UK media companies have a significant international role: Pearson is a major print publisher; Vodafone (United Kingdom) is the second largest mobile operator in the world, with over 440 million subscribers and large market share of the mobile markets in many countries. Vodafone's global size is vastly
p. 447 greater than its UK presence. ↳

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At the same time, the UK wireless market has significant foreign ownership through T-Mobile (Germany) and Orange (France), now operating jointly as Everything Everywhere (EE), which holds 9.1% of the national market. Table 16.17 shows what the market shares of both companies would be individually if they were not operating in platforms such as this 50:50 joint venture. The Virgin Media/Liberty deal of 2013 is reflected, with Virgin Media's markets shares transferred to Liberty for the latest year.

Table 16-17. Top Platform Media Companies in the United Kingdom

	2004/5		2009 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)
BT Group	1,477	25.0	540.9	14.0	–9.1	–1.6
Everything Everywhere (T-Mobile & Orange)	0.0	0.0	561.4	17.0	N/A	2.4
Orange (France Telecom, France)	134.4	8.4	*0.0*	*0.0*	–14.3	–1.2
T-Mobile (Deutsche Telekom, Germany)	116.8	7.1	*N/A*	*0.0*	–14.3	–1.0
Murdoch Group (Sky, 21st Century Fox, US)	357.4	6.3	846.5	16.2	19.6	1.4
Telefónica (O2, Spain)	207.6	9.4	407.3	14.0	13.7	0.7
Vodafone	198.3	9.2	379.7	13.6	13.1	0.6
Liberty (US)	0.0	0.0	217.7	10.3	N/A	1.5
Hutchison Whampoa (3G, Hong Kong)	2.3	1.0	39.2	4.4	232.7	0.5
Virgin Media[1]	192.1	10.0	0.0	0.0		–1.4

Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average
Public Ownership (%)	0.0	0.0	0.0%
Foreign Ownership (%)	32.2	61.8	4.2%
C4 Average—Weighted	78.6	91.9	1.9%
HHI Average—Weighted	2,910	3,043	0.7%
C1 Average—Weighted	41	41	0.0%
National Power Index	2,722	3,043	1.7%

1 Bought out by Liberty in 2013; Liberty's figures reflect this sale.

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United Kingdom—Data Summaries

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	Company Power Index in Country	**Company Share of the Overall National Media Market (%)**	**Company Power Index in Country**	**Company Share of the Overall National Media Market (%)**	**Company Power Index in Country**	**Company Share of the Overall National Media Market (%)**
Murdoch	448.6	10.5	810.6	16.4	11.5	0.9
BT Group	825.6	13.9	288.9	7.5		–0.9
EE (T-Mobile, Germany + Orange)						
(France)[1]	0.0	0.0	299.9	9.1	N/A	1.3
T-Mobile (Deutsche Telekom, Germany)	65.3	4.0	*0*	*0*	–14.3	–0.6
Orange (France Telecom, France)	75.1	4.7	*0.0*	*0.0*		–0.7
Telefónica (O2, Spain)	116.1	5.3	217.6	7.5	12.5	0.3
BBC (public)	287.1	7.3	431.6	9.7		0.3
Vodafone	110.8	5.2	202.8	7.2	11.9	0.3
Liberty (US)	0.0	0.0	142.4	6.5	N/A	0.9
Google (US)	42.7	0.6	148.7	1.6	35.4	0.16
Daily Mail and General Trust	31.8	1.7	33.4	1.6	0.8	–0.02
Penguin Random House (Germany/UK)[1]	0.0	0.0	300.4	1.2	N/A	0.17
Pearson (UK)	14.4	1.6	4.0	0.7	–10.3	–0.1
Bertelsmann (Germany)	14.2	0.9	0.0	0.0	–14.3	–0.13
ITV	74.9	2.8	63.9	3.0	–2.1	0.03
Bauer (Germany)	22.1	1.3	42.2	1.8	12.9	0.06
Trinity Mirror plc	37.6	1.9	16.3	1.1	–8.1	–0.1
Lagardère (France)	17.1	1.0	9.5	0.7	–6.4	–0.05
Hearst (US)	10.6	0.8	13.0	0.9	3.2	0.01
Total Global Radio	7.9	0.5	5.9	0.4	–3.6	–0.02
Channel 4	13.6	1.2	13.0	1.4	–0.7	–0.02
Viacom (US)	8.2	0.8	7.4	1.1	–1.43	0.05
Sony (Japan)	1.6	0.2	0.68	0.1	–8.2	–0.01

Time Warner (US)	27.4	1.5	5.6	0.5	−11.4	−0.16
Disney (US)	5.5	0.5	4.9	0.5		−0.001
The Guardian	1.8	0.5	1.5	0.4	−2.4	−0.01
Condé Nast (Advance, US)	1.3	0.3	1.0	0.2	−4.4	−0.007
Northern & Shell	17.5	1.3	12.1	1.0	−4.5	−0.05
Virgin Media[2]	129.4	6.4	0.0	0.0	−14.3	−0.9

Media Concentration Index	**2004/5**	**2011 or Most Recent**	**% Change Annual Average**
Total Revenue: Nat’l Media Industry (mil US$)	104,098	124,510	2.0%
Total Voices (*n*)	65	67	0.4%
Net Voices (*n*)	43	46	1.0%
Public Ownership (%)	7.3	9.7	0.3%
Foreign Ownership (%)	33.7	52.1	2.6%
C4 Average—Weighted	76.7	85.2	1.2%
HHI Average—Weighted	2,597	2,871	1.5%
C1 Average—Weighted	37.7	41.6	0.0%
Noam Index Average—Weighted	1,000	1,242	3.5%
Pooled Overall Sector C4	38.2	42.7	0.6%
Pooled Overall Sector HHI	520	689	4.6%
Pooled Overall Sector Noam Index	103	123	2.8%
Market Share of Top Ten Companies: Nat’l Media Industry (%) (Pooled C10)	61.9	71	1.3%
National Power Index	2,429	2,888	2.7%

1 Book publishing only.

2 Bought out by Liberty in 2013.

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Public ownership of media in the United Kingdom is relatively low, at 9.7%, mostly through the BBC. The BBC accounts for 50% of TV broadcasting, 10% of magazines, 55% of radio, and 32% of online news media, making it one of the most diverse content media companies in the United Kingdom. Of the companies solely involved in content media, it is the largest by overall national market share with 9.7%, and it holds 20.8% of content (Table 16.16)

Table 16-16. Top Content Media Companies in the United Kingdom

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	**Company Share of the National Content Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Content Media Market (%)**	**Company Power Index in Country**	**Company Share of the National Content Media Market (%)**
Murdoch Interests (US)	564.3	15.7	769.5	16.7	5.2	0.14
BBC (public)	637.3	16.7	926.4	20.8	6.5	0.6
Google (US)	96.9	1.3	319.1	3.5	32.8	0.3
Daily Mail and General Trust	72.1	3.9	71.8	3.5	−0.05	−0.07
ITV	169.8	6.3	137.1	6.4	−2.8	0.01
Penguin Random House (Germany/UK)[1]	0.0	0.0	65.3	2.6	N/A	0.38
Pearson (UK)	32.6	3.6	8.7	1.4	−10.5	−0.3
Bertelsmann (Germany)	32.2	2.1	0.0	0.0	−14.3	−0.3
Time Inc. (US)	0.0	0.0	60.2	2.7	N/A	0.4
Liberty (US)[2]	0.0	0.0	56.1	2.1	N/A	0.3
Bauer (Germany)	50.2	3.1	90.6	3.8	11.5	0.1
Trinity Mirror	85.3	4.3	35.0	2.4	−8.4	−0.3
Northern & Shell	39.8	2.9	25.9	2.0	−5.0	−0.1
Lagardere (France)	38.8	2.3	20.3	1.5	−6.8	−0.1
Total Global Radio	18.0	1.1	12.7	0.8	−4.2	−0.04
Viacom (US)	18.7	1.7	15.9	2.4	−0.02	0.01
Virgin Media	49.8	1.9	0.0	0.0	−14.3	−0.3

Media Concentration Index	**2004/5**	**2011 or Most Recent**	**% Change Annual Average**
Public Ownership (%)	16.7	20.8	0.59%
Foreign Ownership (%)	35.7	40.9	0.74%
C4 Average—Weighted	74.2	77.7	0.5%
HHI Average—Weighted	2,201	2,674	3.1%
C1 Average—Weighted	34	43	1%
National Power Index	2,061	2,711	4.5%

1 Book publishing only.

2 Liberty bought out Virgin Media in 2013.

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Since the 1980s, a relaxation on foreign direct investment has led to an increase in foreign ownership of national media industries (52.1% of all properties are foreign owned). Murdoch's 21st Century Fox (US) is the most active and expansionary of these foreign-owned firms. News Corp. is also the major newspaper firm. Its controlling owner, Rupert Murdoch, moved first to London from his native Australia and created a significant print and political presence. He then moved control of the company to New York. Following public controversies, News Corp. split itself in 2013 into News Corp. and 21st Century Fox. These two firms had 8.1% and 11.5% share of content, respectively. 21st Century Fox is the third-largest media company in the United Kingdom based on Sky, which it controls (Table 16.16).

Traditionally, UK media companies have a significant international role: Pearson is a major print publisher; Vodafone (United Kingdom) is the second largest mobile operator in the world, with over 440 million subscribers and large market share of the mobile markets in many countries. Vodafone's global size is vastly greater than its UK presence. ↳

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At the same time, the UK wireless market has significant foreign ownership through T-Mobile (Germany) and Orange (France), now operating jointly as Everything Everywhere (EE), which holds 9.1% of the national market. Table 16.17 shows what the market shares of both companies would be individually if they were not operating in platforms such as this 50:50 joint venture. The Virgin Media/Liberty deal of 2013 is reflected, with Virgin Media's markets shares transferred to Liberty for the latest year.

Table 16-17. Top Platform Media Companies in the United Kingdom

	2004/5		2009 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)
BT Group	1,477	25.0	540.9	14.0	–9.1	–1.6
Everything Everywhere (T-Mobile & Orange)	0.0	0.0	561.4	17.0	N/A	2.4
Orange (France Telecom, France)	134.4	8.4	*0.0*	*0.0*	–14.3	–1.2
T-Mobile (Deutsche Telekom, Germany)	116.8	7.1	*N/A*	*0.0*	–14.3	–1.0
Murdoch Group (Sky, 21st Century Fox, US)	357.4	6.3	846.5	16.2	19.6	1.4
Telefónica (O2, Spain)	207.6	9.4	407.3	14.0	13.7	0.7
Vodafone	198.3	9.2	379.7	13.6	13.1	0.6
Liberty (US)	0.0	0.0	217.7	10.3	N/A	1.5
Hutchison Whampoa (3G, Hong Kong)	2.3	1.0	39.2	4.4	232.7	0.5
Virgin Media[1]	192.1	10.0	0.0	0.0		–1.4

Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average
Public Ownership (%)	0.0	0.0	0.0%
Foreign Ownership (%)	32.2	61.8	4.2%
C4 Average—Weighted	78.6	91.9	1.9%
HHI Average—Weighted	2,910	3,043	0.7%
C1 Average—Weighted	41	41	0.0%
National Power Index	2,722	3,043	1.7%

1 Bought out by Liberty in 2013; Liberty's figures reflect this sale.

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