

# United Kingdom - Media Landscape

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## Overview

The UK media landscape is characterised by a strongly partisan mass circulation commercial national press and a system of public service broadcasting led by the BBC. A sharp distinction exists between the quality and tabloid national press and

between the regimes that govern the print and broadcast media.

Although the press remains strong, readership and circulation of the printed national press has been steadily falling due to readers moving to digitally available news. Many legacy media organisations have embraced the Internet to make their content available online via dedicated sites or apps for mobile devices. The online readerships of some newspapers now greatly surpass printed circulation, yet newspapers are still struggling to find ways to make online readership profitable. A great deal of influence is attributed to the national press in the public sphere, particularly at election time. The suggestions of this influence is evidenced by the notorious British tabloid headline, 'It's the Sun wot won it' the day after the unexpected election of a Conservative government which the paper had supported in 1992. Research provides convincing evidence that the press agenda exerts a strong influence on the broadcasting agenda.

A strong commercial press funded by advertising developed in the UK. The commercial basis allows the press to operate independently of government and party control. The UK case is an exception within Hallin and Mancini's Liberal model because the professional journalistic ethos to divide fact-based news from opinion does not result in political neutrality as seen in the other countries in the Liberal model – the USA, Ireland and Canada. As Hallin and Mancini note, the concept of 'press parallelism' was developed in Britain and relates to the tendency of the British press to reflect divisions in political parties closely and to adopt distinct political orientations even though newspapers do not have official links with political parties. These political orientations are more clearly manifest in news reporting, particularly in tabloids, than in other countries. The strict division between fact-based objective reporting and opinion that characterises US papers is far more blurred in British papers, even in broadsheets which deploy a more subtle, interpretative style than the tabloids. The relatively strong press parallelism of the British press is also indicated by the high degree to which readers buy newspapers according to their political preferences.

Partisanship is largely fixed and based on traditional positions. However, the partisanship of some papers has been more fluid than others, with the Sun famously switching allegiances to Blair's Labour party then back again to support Cameron's Conservatives, and changes of ownership often lead to changes in party endorsement. Given the degree of political parallelism, many have observed with concern the disproportionate right-wing weighting in the political orientation of the UK press. Hallin and Mancini's 2004 observation that this partisan imbalance may be shifting towards support for Labour and/or more pragmatic orientations has come full circle with a clear dominance of right-wing supporting papers in 2018. Only two papers and their sister Sunday publications (*The Guardian/The Observer* and *The Daily Mirror/Sunday Mirror*) supported the opposition Labour party in the 2017 election. A diversity of opinions in the British press relies on the degree of plurality of ownership and the degree to which newspapers owners choose to influence the partisanship of their papers. The strong connection between ownership and partisanship has led to concerns about plurality due to the high degree of concentration of newspaper ownership in the UK market.

The UK's newspaper readership continues to be stratified by class and a left/right political divide. Readerships of quality/broadsheet newspapers are predominantly ABC1, with far fewer C2DE readers. Readerships of mid-market papers are more evenly split with relatively equal proportions of readers from each socio-economic background. Tabloids are read predominantly by C2DEs yet their high circulation means that despite low proportions of ABC1 readers they reach a relatively large section of this population. Mid market tabloids have taken more market share since Hallin and Mancini's observations when tabloids accounted for 54 percent of the market and mid-market tabloids held 27 percent. Based on ABC figures for 2018, tabloids now account for 48 percent, mid market tabloids 33 percent, and broadsheets 19 percent.

In comparison, public service broadcasting operates a system characterised by a strong tradition of political neutrality. Statutory regulation requires all news produced by broadcasters, television and radio, to remain impartial and to provide balanced coverage. These obligations are overseen by the regulatory body Ofcom. Ofcom also monitors and enforces

special impartiality requirements and other legislation that must be applied at the time of elections and referendums. In addition, the BBC has its own set of editorial codes and guidelines to ensure neutrality and diversity in their reporting. Despite the existence of these policies and legislation some degree of controversy exists regarding BBC coverage which is variously accused of being biased towards both sides of the political spectrum.

Commercial broadcasting has traditionally played an important role alongside a strong public service broadcasting system. A drive towards opening up the UK market to the global industry led to increasing deregulation and a subsequent increase in non-UK ownership of broadcasters.

Although the press and broadcasting is predominantly organised at a national level, the importance of regional and local media should not be overlooked. In particular, media organised at the level of the devolved nations of Scotland, Wales and Northern Ireland play an important role for the public in these areas.

Professional journalism is well developed in the UK with journalists considering that they enjoy significant autonomy and operating according to the values of providing a public service. However, two significant shifts in education and ethics have occurred since Hallin and Mancini's overview of the profession. First, the shift towards more journalists possessing university degrees has continued apace and is now the norm rather than the exception. Second, the 'phone hacking scandal' and the subsequent government inquiry led by Leveson in 2012 necessitated a major re-evaluation of journalistic ethics and practices (see 3.2). Leveson's recommendations also led to an as yet incomplete major shake up of the system for self regulation of the press.

Methods for accessing news in the UK continue to evolve towards the digital. 2017 marked the first year when the proportion of people using online platforms (74 percent) to access news overtook those using television (69 percent) and print (41 percent) according to the Reuters Digital report.

## Media

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### Print

The UK is characterised by a comparatively large national press with 11 national daily newspapers, and 10 Sunday sister titles (this is more than France, Germany and USA). Seven of these titles publish special editions for Scotland, and these compete with three Scottish dailies. National newspapers are typically divided into three sectors which relate to their physical size, as well as the quantity of news, values and quality of content: broadsheet (also known as quality), mid-market, and tabloid. The mid-market papers of the *Daily Mail* and *Daily Express* share a tabloid size with the 'red-top' tabloids *The Sun*, *The Daily Mirror*, and the *Daily Star*. Until the early 2000's all broadsheets were printed in a large format hence the name broadsheet. *The Independent* was the first to break with tradition and reduced the size of the paper to a more manageable 'compact' format. It was closely followed by the *Times* in 2003. Until very recently the *Guardian* was the odd one out with a 'Berliner' size, but changed to tabloid format in 2018. These changes are indicative of savings associated with print costs rather than any changes in the journalistic values of the papers.

The traditionally very strong daily paid circulation of national newspapers has been in steady decline for some time, although online readerships are rising. Print newspapers are read by 1 in 4 adults over 15 every day (13.6 million daily) and reach larger audiences weekly (24.9 million) and monthly (30.8 million). Print Circulation has fallen approximately 40 percent

between 2010 and 2018. In 2010 the national papers sold an average of 9.5 m copies each day. Adding the freesheets of the *Metro*, *London Evening Standard* and *City AM* adds approximately another 2m to make a total of 11.5m. By January 2018 paid circulation had fallen to 5.65m for the main national dailies, and to a total of 8.1m when the circulation of freesheets is included. Traditionally Sunday titles have been very popular with a combined circulation in 2015 of 6.16m. However, this had fallen to 4.7m in 2018.

ABC figures for the beginning of 2018 show that the downward trend in print readership is affecting the popular (tabloid) and mid-market sectors the most and that the once stable rankings of the broadsheets are in flux. Circulation of the market leader the *Sun* is down 7.7 percent to 1,545,594; the *Daily Mail* is down 11.13 percent to 1,343,142; the *Daily Mirror* is down 19.55 percent to 583,192; the *Daily Star* is down 11.61 percent to 391,988; the *Express* is down 7.08 percent to 364,721. The picture in the broadsheet market is more mixed, with smaller declines, and the rise of Saturday newspapers at the expense of the once traditionally strong Sunday titles. *The Times* fared best with a decreased circulation of 2.37 percent to 440,558; the *Daily Telegraph* lost its hold as market leader and was down by 18.4 percent to 385,346; and the *Guardian* fell by 2.58 percent to 152,714. Sunday mid-market papers and tabloids fell between 6.45 percent and 19.45 percent. With the exception of the *Sunday Telegraph* which fell by 16.88 percent, the Sunday broadsheets saw smaller declines of 2.7 percent for the *Times* and 4.87 percent for the *Observer* (the Sunday version of the *Guardian*).

Printed circulation figures are no longer a reliable way of measuring the reach of newspapers due to the rise in readers accessing news via digital platforms. Although the variety of different measurement systems for digital audiences in use makes comparisons difficult, it is clear that many newspapers are successfully growing their audiences online. A market report produced for the News Media Association in 2016 illustrated that reader habits are changing with the digital audiences of many newspapers now larger than print audiences – see data below. 75 percent of adults read newspapers online every month and digital platforms boost a newspaper's print readership by an average of 38 percent. With the exception of the *Mail Online*, digital readership is showing significant increases year on year (2017 to 2018) for most newspapers. ABC figures from the beginning of 2018 show the percentage increases in total daily average unique browsers up for all papers with the exception of the market leading *Mail Online*: *Mail Online*, 13,738,436 down 12.17%; *Trinity Mirror Group* (Digital) 10,112,183, up 6.53%; *The Sun*, 5,273,610 up 24.15%; *The Independent* (online only) 5,026,018, up 4.04%; *Metro* 2,561,846, up 61.04%; *Evening Standard*, 944,143 up 42.01 percent.

The UK national newspaper market is highly concentrated. Three companies dominated the market in 2015 accounting for 71 percent of circulation. In 2015 two companies, Rupert Murdoch's News Corp UK and Lord Rothermere's Daily Mail Group, accounted for nearly 60 percent of national newspaper circulation. The picture differs slightly if we include online and mobile readers. The strong online reach of the Daily Mail Group makes it the most dominant, closely followed by Trinity Mirror and the Guardian which have strong online readerships. In terms of concentration, data shows that five companies account for 80 percent of all consumption, online and offline. The following is a list of ownership of the national daily and Sunday newspapers. It includes data from the latest Media Reform Coalition report (2015) to show the market share of each ownership group first by print circulation and then by combined print, online and mobile readership:

- DMG media/Associated Newspapers – *Daily Mail*, *Metro*, *Mail on Sunday*, 33.6 percent / 20.1 percent.
- Guardian News & Media Ltd – *Guardian* and *Observer*, 2.5 percent / 15 percent.
- ESI Media – *London Evening Standard* and the *Independent* (online only since 2016); 4.5 percent / 9.5 percent.
- News Corp UK and Ireland Ltd – *The Sun*, *The Sun on Sunday*, *The Times*, *The Sunday Times*, 33.6 percent / 13.7 percent.
- Telegraph Media Group Ltd – *The Telegraph* and *The Sunday Telegraph*, 7 percent / 14.1 percent.
- Trinity Mirror plc – *Daily Mirror*, *Sunday Mirror* and *The Sunday People*; 13.6 percent / 16.3 percent.

- Northern and Shell Media Group - *The Daily Express, The Sunday Express, The Daily Star, The Daily Star on Sunday* (sale to the Mirror group by Northern & Shell going through in February 2018); 12.1 percent/11.3 percent.
- Johnston Press –*The i*. Data not available.
- Nikkei Inc. – *The Financial Times*; 2.6 percent/not available.

The local press in the UK has a strong albeit declining print readership. It is not a major agenda setter but has traditionally played an important role in reporting on local authorities and courts due to the regional remit of local television and radio news. According to the News Media Association in 2016 print and online editions of local newspapers were read by 40 million people a week, with 28 million people saying they frequently read their local newspaper. Like their national counterparts, paid print circulation of local and regional newspapers is in decline with weekly circulation falling approximately 11.2 percent between 2016 and 2017. The trend for increases in digital readers seen in the national press is also replicated locally but is not yet consistent across the country and is not enough to offset the losses from falling print circulation. Digital editions of local and regional papers are accessed for free and have not yet succeeded in attracting digital advertising at levels to offset losses in print advertising. An example of the proportions of revenue from print (cover price plus advertising) and digital (advertising) for one of the largest local newspaper owners, Johnston Press, illustrates the fall in overall revenue as well as the relatively small increases in digital revenue. In 2010 the overall revenue of £350.8m was divided between £332.5 million print revenue and £18.3m digital. By 2015 overall revenue had fallen by 37 percent to £221.1m divided between £190.5m print revenue and £30.6m digital.

Many local newspapers have either closed or moved from daily to weekly publication creating news vacuums. 273 out of 406 Local Authority Districts (LADs) in the UK do not have a daily local newspaper. The local and regional newspaper market is highly concentrated. The five largest publishers account for 77.1 percent of all local newspapers in the UK – Trinity Mirror (226 titles); Johnston Press (213 titles); Newsquest (211 titles); Tindle (126 titles) and Archant (75 titles). The strategies of the five dominant publishers to merge operations have resulted in major job losses (418 between November 2015 and March 2017), office closures, and the physical relocation of staff to places away from the localities they cover. Approximately 200 local newspapers have closed since 2005 and the number of journalists employed by local papers has halved. Many daily titles have been reduced to weekly publication.

Despite increases in audiences boosted by digital readers, the newspaper industry has continued to experience falling revenues over the past decade. The funding model of the press is under threat due to consistent falls in circulation, drops in advertising revenue reflecting the shift of advertising spend to online media and the recent dominance of technology companies such as Google and Facebook over online spending (estimated to account for 75 percent of all new online advertising spending in 2015). Digital audiences are not yet yielding the same revenues as print audiences and cannot make up for the losses. Average annual revenue per print media user is estimated at c. £124, while revenue per digital media user is estimated at c. £15.5.

At the time of writing the UK government had announced a review into sustainability of national, regional and local press. This is in addition to the new BBC scheme to invest up to £8m annually in Local News Partnerships during the next nine years in an effort to support local journalism. The scheme includes a Shared Data Unit, and a facility allowing local news providers access to relevant regional BBC video and audio content. It also funds the recruitment of nearly 150 local democracy reporters whose work reporting on local councils and public institutions will be shared among over 700 local news providers who have signed up to the scheme (mainly local newspapers).

## Radio

Radio has remained very popular in the UK and audience numbers have not declined in the same way as other platforms.

The reach of radio has remained stable in the last five years with 89.6 percent of adults over 15 listening to the radio at least once a week. Among radio listeners the average minutes spent listening is over 3 hours per day at 183 minutes, and the average time spent by listeners per week has risen slightly to 21 hours and 24 minutes. Music focussed stations are the most popular at 63 percent with 38 percent listening to speech based stations. Podcasts are rising in popularity at 16 percent. Age shapes consumption with RAJAR data showing that of the 34 percent of adults who listen to speech radio each week about two thirds are aged over 44.

Although live broadcast radio continues to have a high penetration, listeners are beginning to access speech and music content on a range of Internet connected devices including computers, mobiles and tablets. The lines between radio and other audio mediums and content providers are becoming blurred with many non-radio media providers providing audio material through podcasts. This includes newspapers and magazines as well as independent podcast creators. The BBC has created the radio iplayer as a specific gateway to access radio live or to on a 'listen again' basis and has a vast back catalogue of broadcasts.

The radio sector is almost equally divided between the public service broadcasting BBC stations (national and local) which account for 52.5 percent of listening and commercial radio which accounts for 44.9 percent. The vast majority of commercial stations are local and account for 27.1 percent of listening compared to national commercial stations' share of 17.1 percent. The remaining listening goes to community radio stations. Stations broadcast on analogue (AM/FM), digital audio broadcasting (DAB) and via TV platforms. Although the introduction of digital radio has greatly expanded the number of stations available, analogue retains the largest number of overall stations. In terms of analogue licences there are 286 local commercial stations, 43 BBC local stations, 3 UK-wide commercial stations, 5 UK-wide BBC stations, and 251 community radio stations. Digital continues to expand with a total of 435 stations divided between 11 BBC UK-wide digital stations, 31 UK-wide commercial digital stations, and 394 local commercial digital stations. Digital radio has proved popular with 57 percent of radio listening households having a DAB radio and 46 percent of listener hours being through a digital platform.

With an overall weekly reach of 59 percent, the most popular BBC nationwide stations are *BBC Radio 2* (28 percent), the speech only station *BBC Radio 4* (21 percent), and the music station aimed at younger audiences *Radio 1* (18 percent). BBC regional services are also popular in the nations of the UK: *BBC Ulster* (36 percent), *BBC Scotland* (18 percent), and *BBC Wales* (13 percent). Four stations dominate the national commercial market: *Heart* (17 percent), *Capital* (15 percent), *Smooth* (10 percent), *Kiss* (10 percent).

Provision for community radio was included in the 2003 Communications Act which created a 'third tier' of broadcasters by secondary legislation and established a Community Radio Fund. According to Ofcom, community radio stations typically cover a small geographical area with a coverage radius of up to 5km, and are run on a not-for-profit basis. They vary in whether they cater for whole communities or for specific areas of interest such as a particular ethnic group, age group or interest group. Community stations are currently only licenced to broadcast on FM/AM and the government is currently consulting on opening up the Digital Audio Broadcast network to community radio.

The sector is healthy with commercial radio revenues rising by 1 percent to £526m, BBC expenditure of £707m, community radio expenditure of £0.6m in 2017 and radio maintaining its share of total advertising expenditure at 3.0 percent in 2016. There is a relatively high degree of concentration in the commercial local radio market. Two companies, Global Radio and Bauer Radio, account for just under 40 percent of licences, while five groups (Global and Bauer, Celador, UKRD Group and UTV Radio) together account for 168 stations – 58 percent of the total. With 70 and 42 licences respectively Global and Bauer together account for almost 35 percent of the radio market in terms of listening hours.

# Television

Broadcast TV audiences remain high - 91 percent of the population view TV at least once a week. The UK television sector is undergoing significant change due to a number of factors including 1) the switchover from analogue TV to digital terrestrial television in 2012 means that all homes receive multichannel TV; 2) the complexity of the number of ways households receive linear TV broadcasts which are fragmented across a range of platforms (terrestrial, satellite, cable, etc.) 3) the rapidly increasing shift in viewing habits away from linear to non linear viewing through catch up, video on demand and streaming services such as BBCiplayer, Youtube, Netflix, and Amazon Prime which can be accessed on multiple devices including mobile phones, tablets and laptops.

The market has fragmented into a confusing array platforms used by viewers to watch linear TV. The following shows the numbers of households in millions that receive broadcast TV through one or more of the following: 18.69 Terrestrial: (all homes which have access to digital terrestrial TV via their aerials); 11.28 Terrestrial only (the subset of terrestrial households that do not have access to either cable or satellite reception); 4.15 Cable (almost entirely Virgin Media); 2.25 YouView (all households who have the BT, TalkTalk or YouView platforms). 1.4 Other satellite (former Sky subscribers who use their satellite to access digital terrestrial services); 1.14 Freesat (free to air digital terrestrial via a satellite); 8.82 Sky subscribers.

Despite the greater choice of programming the main public service broadcast channels (*BBC One, BBC Two, ITV/STV/UTV, Channel 4 and Channel 5*) continue to attract more than half of the total broadcast TV audience and have maintained a 51 percent share over the past four years to 2016. The BBC is Europe's most successful public broadcaster with a weekly reach for news via TV and radio of 67 percent. Whilst the content and method of accessing it may be undergoing major changes, the amount of time audiences spend viewing broadcast TV has declined at a fairly slow rate from 242 minutes in 2010 to 212 minutes in 2016.

The availability of catch-up, on demand and subscription programming is driving a fast pace of change towards non-linear viewing. Viewers are now able to decide what they want to watch, when they want to watch it, and on what device. Such services have taken off due to increases in the number of households with Internet enabled TVs (smart TVs) which come ready loaded with a range of free and subscription on demand services. In 2017, 39m households had smart TV and growth rates suggest that smart TV will overtake time shifting/recording devices (PVRs) in 2018. The proliferation of other Internet enabled devices is also driving audiences to access on demand services via mobile devices and computers.

Free on demand services are offered by terrestrial channels such as *BBC iPlayer, ITV Hub and All4*. *BBC iPlayer* is the most popular on demand TV service with 63 percent of respondents in Ofcom's survey using it, followed by 40 percent for *ITV*. There are marked age-related differences with younger people more likely to use non-linear services and choosing different content providers: 66 percent of teens use YouTube compared to 34 percent adults, and only 54 percent of teens use *BBC iPlayer*. Three times as many households subscribed to one or more of the available video on demand services in 2017 (9.51m) as did in 2014 (3.83m). Subscription video on demand services are dominated by Netflix (7.89 million), Amazon Prime (3.84m), and Now TV (1.44 million). At £1.7bn, total revenue for online TV in 2016 is almost six times as much as 2010 levels of £0.3bn.

The rapid pace of change and entrance into the market of a plethora of new content providers is causing some to ask how much market share and revenue traditional TV providers such as the BBC, ITV and Sky will lose to new streaming services. It has been suggested that 'super-aggregators' may emerge as 'one-stop' platforms for viewers who want a simple way to access content. More than 20 percent of under-35s use more than seven services to keep up with their favourite shows, and 40 percent say they are becoming confused by how many options are available.

Such changes would disrupt the current pattern of ownership in the TV industry. Measurements of ownership based on revenue in 2014 show Sky as by far the largest broadcaster at £7.6bn. The BBC is the largest of the PSB broadcasters with £5.1billion (£3.7bn of which is provided by the licence fee); the cable provider Virgin Media is 3<sup>rd</sup> with £4.1bn followed by BT £4bn, ITV £2.8bn, Channel 4 £1.7bn and Channel 5 £0.9bn.

The BBC and Channel Four are publicly owned. The relaxation of ownership regulations in the 1990s opened up the television industry to international companies and has resulted in US ownership of several UK media companies. Rupert Murdoch's 21st Century Fox owns 39.1 percent of Sky plc, and, having been seeking for some years to buy the remaining share made a formal bid in 2016. As of February 2018 the UK Competition and Markets Authority has provisionally found that Fox's bid to take control of the 61 percent of Sky it does not already own is not in the public interest due to concerns about media plurality. Virgin Media was purchased by the US based international cable company Liberty Global in 2013 and Channel 5 was bought by US based Viacom International in 2014.

Revenue in the broadcast TV industry has shown a small increase rising from £13.3bn in 2010 to £13.8bn in 2016. Figures for the main revenue source for television service providers are only available for the industry as a whole so do not accurately reflect the proportions for non-subscription channels which, with the exception of the BBC, rely almost entirely on advertising. Overall industry revenue is divided between subscription (46 percent) and advertising (30 percent) and other (6 percent). A further 18 percent of the total revenue of the industry represents the BBC income that is allocated to TV (the BBC also produced radio and online content). Subscription revenue includes Ofcom's estimates of subscriber revenue for *BSkyB*, *Virgin Media*, *BT Vision*, *TalkTalkTV*, *Setanta Sports*, *ESPN* and *Top Up TV*. 'Other' includes TV [shopping](#), sponsorship, interactive (including premium-rate telephony services), programme sales and Welsh channel S4C's grant from the government. According to Ofcom, broadcast TV remains a strong recipient of advertising spend and has accounted for an average of 30 percent of the advertising spend in the UK since 2010.

In an attempt to plug the gap in locally produced television, particularly local news, the government launched an initiative in 2012 to create a network of local TV stations. The first stations went on air in 2014 and to date 23 have been granted licences. Each station is under an obligation to meet a quota for locally produced content. The local TV initiative was funded by a £40m subsidy from the BBC licence fee, of which £25m was spent on setting up the transmission network and a further £15m is earmarked for the BBC to buy in content from the new channels.

Until very recently, television remained the most used platform for news consumption. Ofcom data shows that 69 percent of adults used TV for news in 2016 although TV is less popular with younger viewers (49 percent for 16-24 year olds). Despite being overtaken by online platforms (74 percent) in 2017, television news remains a very common source of news (69 percent) and is far more widely used than print (41 percent) according to the most recent Reuters Digital report. Adults watched an average of 110 hours of TV news in 2016, with younger people watching far less (16-24s watched 23 hours) and older adults aged 65+ watching far more (215 hours). These figures have remained fairly stable since 2010. The vast majority of TV news viewing is on *BBC One* (67.2 percent), followed by *ITV* (12.3 percent), the BBC's 24 hour news channel (8.6 percent), *Sky 24* hour news (6.7 percent) and *Channel 4* at (3 percent).

Statutory regulation through Ofcom obliges terrestrial television channels to produce news at certain points throughout the day. Broadcast news on the two main channels of BBC and ITV remains popular drawing in audiences of 4.6m and 1.9 million respectively for their late evening bulletins in 2016. Television news on all channels licenced in the UK (digital and terrestrial) is under a regulatory obligation to provide news according to strict impartiality criteria. There are in excess of ten 24 hour news channels available via satellite, cable, and digital terrestrial TV. These include *Russia Today*, *Aljazeera*, *CNN*, and *France 24*, but *BBC News* and *Sky News* are by far the most popular. Neither brings in large audiences (audience share *BBC News*



0.88%; *Sky News* 0.52 percent), and only reach a small portion of the overall weekly viewing audience (*BBC News* 11.65 percent; *Sky News* 7.2 percent).

## Digital Media

There is a large and growing number of online-only media in the UK. Many focus on news and provide either hyperlocal news or news from a specific ideological angle (e.g. *The Canary*). The broadsheet newspaper the *Independent* ceased to be available in print format and went online only in 2016. All newspapers have digital and print editions. The majority of newspapers are free to access although some newspapers are experimenting with a range of different payment models. The *Times* and *FT* are behind a paywall with no content available for free. Others such as the *Independent* offer limited content for free with additional content available to subscribers. The *Guardian* began raising extra revenue in 2016 by asking readers for one off contributions to support its journalism. It has expanded the revenue generated from readers who subscribe as 'supporters' or 'members' and have access to a range of additional content including podcasts and expert discussions. As shown in section 1.1 the digital audiences of many news media organisations are now larger than the print audiences.

## Social Networks

According to Internet world statistics for 2017 the UK shares the ranking of the third highest Internet penetration rates in the EU with the Netherlands at 94.8 percent. Only Luxemburg (97.5 percent) and Denmark (96.9 percent) have higher rates. ONS statistics for 2017 show Internet penetration at 92 percent with 89 percent of adults having used the Internet in the last 3 months. Only 9 percent of adults have never used the internet. Use is far higher among younger people with 99 percent of under 35s using the Internet regularly. The UK has the second highest number of users at 62m (Germany has most at 72.2 million). Slightly different measurements from Ofcom found that in 2017 88 percent of UK adults have Internet access at home via any device. A breakdown of access figures provides evidence for a continuing digital divide characterised by age and social class. 90 percent of under 55s have access compared to 78 percent of 65-74s and 53 percent of 75+. Those with a lower socioeconomic status are least likely to have access (DEs 74 percent).

At 46 percent in 2016 Internet advertising continues to be the largest category of advertising spend in the UK with a total spend of £10.3bn. Internet advertising has grown significantly from 2010 levels of £4.7bn. Online advertising is divided between a range of formats, many of which are rapidly emerging. It is dominated by paid for search advertising which accounts for 49 percent of the market. The remaining online advertising spend goes on display advertising (35 percent), classifieds (14 percent) and other (3 percent). Programmatic ad buying informed by algorithms powered by user data collected by cookies or log-in data accounted for 72 percent of all display advertising spend in 2016. In 2017 over half (54 percent) of online advertising spend went to Google and Facebook. Based on current growth rates predictions suggest that this share will rise significantly in the next few years.

People in the UK access the Internet via a range of devices with smartphones the most commonly owned. In 2017, 76 percent of UK consumers owned a smartphone, followed by laptops (64 percent) and tablets (58 percent). Smartphone ownership is very high among under 55s - 96 percent for 16-34, 88 percent for 35-54, and 47 percent 55-64. The total UK digital audience (on laptops, desktops or mobile devices) was 50.4 million in March 2017. This can be separated between 46.5 million who access via laptops and desktops and a mobile audience of 36.2 million. Monthly usage stands at an average of 83 hours online per person in March 2017. Much of this time represents work use or those who regularly use the Internet in a professional capacity.

The most used social media and messaging brands are Facebook (65 percent), YouTube (46 percent), Facebook Messenger (37 percent), Whatsapp (33 percent), and Twitter (25 percent). Focussing specifically on social media, Facebook attracts the

largest audiences of 39.7 million (more than three-quarters of active Internet users). The next biggest sites are Twitter (21.9 million) and Instagram (19.4 million).

## Opinion Makers

Opinion makers or influencers include bloggers, Vloggers, and social media influencers. The top ten blogs of 2017 are a mix of three political sites, motor racing, fashion, wedding and travel blogs. The most popular blog is a political blog called Guido Fawkes. Political blogs tend to provide alternative viewpoints for niche audiences. Social media influencers have appeared alongside traditional marketing, PR, and advertising. Ratings of the most influential people on Twitter and Instagram are regularly published by the PR industry. Vloggers on Youtube are also regarded as popular influencers. Social media influencers commonly communicate on the topics of fashion, beauty, sports and other consumer orientated topics.

Twitter is an important network for politicians and journalists. It is increasingly common for comments on Twitter to be incorporated into news coverage as a legitimate source. An increasing number of politicians and other public figures have been criticised, and in some cases forced to resign, due to comments made on social media.

## Sources

### Newspapers

- [The Daily Express](#)
- [The Daily Mail](#)
- [The Daily Mirror](#)
- [The Daily Star](#)
- [The Daily Telegraph](#)
- [The Financial Times](#)
- [The i](#)
- [The Independent](#)
- [The Sun](#)
- [The Times](#)

### Radio

- [Bauer radio](#)
- [BBC Radio](#)
- [Capital](#)
- [Global radio](#)
- [Heart](#)
- [Kiss](#)
- [Smooth](#)

### Television

- [Amazon prime](#)
- [BBC](#)
- [Channel 4](#)
- [Channel 5](#)

- [ITV](#)
- [Netflix](#)
- [Sky](#)
- [Virgin Media](#)

# Organisations

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## Trade Unions

Journalists are represented by one large and two smaller unions. The largest is the National Union of Journalists (NUJ) which has a broad remit to represent all those working in newspapers, magazines, books, PR and communication. This includes many who do not call themselves journalists - photographers, producers, presenters, website managers, content providers, advertising copywriters, designers, social media officers, bloggers, podcasters, press officers, communications officers. The British Association of Journalists (BAJ) represents those involved in the editorial workflow process (reporters, hyperlocal editors, photographers, writers, sub-editors, page layout artists, and news broadcasters). The Chartered Institute of Journalists (CJoJ) represents those employed in journalism and public relations. The Broadcasting, Entertainment, Cinematograph and Theatre Union (BECTU) is the UK's media and entertainment trade union. BECTU covers broadcasting, cinema, film, digital media, independent production, leisure, IT and telecoms, theatre and the arts. In 2017 BECTU merged with a larger union and became the 'Media and Entertainment' sector of Prospect which includes sectors representing a range of professions. Workers in the paper, printing and publishing industry are represented by the Graphical, Paper and Media and Information Technology section of the UK's largest union, Unite. Prospect and Unite are illustrative of the trend for small, specialised unions to merge with larger organisations with increased bargaining power. However, the power of trade unions was significantly weakened during the late 1980s and early 1990s by anti-union legislation and the de-recognition of unions by employers.

## Journalist Associations

Unlike the situation in other countries such as Italy, journalists are not formally required to pass a special exam or to be a member of a professional body. Two organisations oversee the accreditation of training courses and degrees – the National Council for the Training of Journalists (NCTJ) and the Broadcast Journalism Training Council (BJTC). Recognition of press/media credentials is managed by a voluntary scheme administered by the UK Press Card Authority. The Press Card scheme is owned and collectively controlled by the UK's major media organisations, industry associations, trade unions, and professional associations. Journalists are issued with a card by one of the nineteen members who act as 'gatekeepers'. Members of the National Union of Journalists (NUJ) are required to sign up to the NUJ's code of conduct and agree to adhere to a set of professional principles overseen by the NUJ's ethics council. There are several associations representing the interests of specialist journalists including the Foreign Press Association; Society of Women Writers and Journalists; and the British Press Photographers association.

## News Agencies

News agencies provide syndicated content that journalists use as primary source material. The main national UK news agency is the Press Association (PA). PA is owned by a private company, the PA Group, which has 26 shareholders, most of

whom are the UK's major national and regional newspaper publishers. PA was established in London in 1868 as a news gatherer for local and regional newspapers. Today it has expanded its services to provide multimedia content and claims "We are trusted because we are fast, fair and accurate." The Press Association's central offices are in London with satellite offices situated across the UK in Nottingham, Howden, Bristol, Glasgow, and Edinburgh. Reuters supplies national and international news. Its European headquarters are based in London and many other international agencies have offices in London. These include: Agence France-Presse (AFP); Agencia EFE; AP; Bloomberg; Dow Jones; DPA; IRNA; ITAR-Tass, and Xinhua. Many other news and picture agencies operate in the UK. A number of regional and local freelance agencies provide story and picture services through the National Association of Press Agencies (NAPA).

As a result of the increasing role of social media in sourcing stories agencies specialising in providing verification services to news organizations have been established. The international social media verification agency Storyful has a bureau in London supplying services to contextualize and verify the authenticity of social media data.

## Audience measurement organisations

Audiences in the UK are measured by platform specific 'not for profit' organisations set up as Joint Industry Currencies (JICS). Joint Industry Currencies is a unique system designed and run in conjunction with industry to provide audience numbers and trading metrics for advertising mediums including TV, Radio, and newspapers. Their motto is 'objective transparent, accountable'. The Broadcasters' Audience Research Board (BARB) was established in 1981 as the official organisation measuring UK television audiences. BARB viewing data provides a minute-by-minute breakdown of viewing at regional and national levels. BARB measures viewing through meters fitted to TV sets, laptops, PCs and tablets in a specially recruited panel of 5100 households selected to represent other households across the UK. It was founded by the UK's major television companies. The Radio Joint Audience Research (RAJAR) is the official body in charge of measuring radio audiences in the UK. It is jointly owned by the BBC and the Radiocentre (the trade body representing the vast majority of Commercial Radio stations in the UK) on behalf of the commercial sector. A sample of 100,000 adults complete listening diaries for one week. The Audit Bureau of Circulation (ABC) originally measured printed newspaper circulation but now includes digital audiences. Based on a survey, the National Readership Survey (NRS) was established in 1956 and covers over 250 of Britain's major newspapers and magazines. The UK Online Measurement company (UKOM) was founded in 2009 to provide an accurate measurement of online audiences. UKOM is not a JICS and is co-owned by the Association of Online Publishers, the AOP, and by the IAB, the Internet Advertising Bureau. UKOM uses a hybrid measurement approach involving a metered respondent panel and site/app tagging combined. Each of these audience measurement systems face challenges in how to ensure they remain accurate in an era of increasingly fragmented audiences and cross-platform consumption patterns.

## Sources

Trade Unions

- [BECTU](#)
- [British Association of Journalists](#)
- [Chartered Institute of Journalists](#)
- [NUJ](#)
- [Prospect](#)
- [Unite](#)

## Journalists Associations

- [British Press Photographers Association](#)
- [Foreign Press Association](#)
- [Society of Women Writers and Journalists](#)
- [UK Press Card Authority](#)

## News agencies

- [National Association of Press Agencies](#)
- [Press Association](#)
- [Reuters](#)
- [Storyful](#)

## Audience measurement organisations

- [Audit Bureau of Circulations](#)
- [Broadcasters' Audience Research Board](#)
- [National Readership Survey](#)
- [Radio Joint Audience Research](#)
- [UK Online Measurement company](#)

# Policies

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## Media legislation

Until the UK withdraws from the EU, Articles 10 and 8 of the EU Human Rights Act guarantee provisions in the UK which safeguard freedom of expression and freedom of the press and the right to privacy respectively. UK journalists must also operate within the law in relation to defamation, contempt, copyright and privacy.

As a current Member State of the European Union, the UK's regulation of audio visual media services reflects the requirements of the EU Audio Visual Media Services Directive (AVMSD). The directive was revised in 2016 to reflect the shift in viewing habits away from broadcast TV towards video on demand and video sharing platforms. Under the directive the UK must impose certain minimum requirements on the audio visual media services that it regulates on all three platforms. The AVMSD includes quotas to promote content that originates in the EU and imposes standards on content. Standards for content relate to rules for to limit advertising time to 20 percent, to protect the vulnerable from potentially harmful advertising content, and to prohibit hate speech.

The main ministerial department responsible for the media is the Department for Digital, Culture, Media, and Sport (DCMS). Media legislation and policy in the UK relates to two sectors: the commercial media (press and broadcasting) and public service broadcasting. Since the 1990s there has been a general trend in the UK for deregulation and a relaxation in the rules preventing cross media ownership of commercial media organisations. The most recent significant piece of media legislation is the Communications Act 2003 which opened up ownership of UK media to non EU companies and established Ofcom. The

Act also included cross ownership rules which prevent large newspaper groups from owning a Channel 3 broadcasting licence; introduced the Media Public Interest Test, which allows the Secretary of State to intervene in media mergers to determine whether the merger might result in harm to the public interest; and introduced a restriction on broadcast licences which requires Ofcom to determine whether a person or company meets the requirements to hold a licence. Critics claim that the opening up of the media to market forces and deregulation has led to a concentration of ownership, news driven by profit making rather than the public interest, and a reduction in the quality of news.

The governance and funding of the UK's main public service broadcaster the BBC is set out by Royal Charter. UK governments regularly re-evaluate the public service broadcasting funding model for the BBC through reviews of the BBC's Charter. Each Royal Charter runs for 10 years and the current Charter has just been renewed and is set to run until 2028. The new Charter for the BBC published in late 2016 set out major changes to the way the BBC is to be run. The main contention during the review was whether the BBC should continue to be funded by the television licence fee payable by any household wishing to watch or record television programmes on any platform or through any device. The licence fee funds BBC programmes and services and a proportion of the licence fee contributes to the costs of rolling out broadband to the UK population and funding Welsh-language TV channel S4C and local TV channels. The licence fee allows the BBC's UK services to remain free of advertisements and independent of shareholder and political interest.

The Charter renewal stated that the licence fee will continue until at least 2028 although it is "likely to become less sustainable" in the longer term. There are no plans to replace the licence fee with a subscription model, but the BBC will be given an opportunity to consider and explore whether to make any of its content available on a subscription-only basis. The charter period will change from 10 to 11 years, to remove it from any political cycle. There will be a "health check" during the charter period to "make sure things are working as they are supposed to." A new mission statement for the BBC was created: "To act in the public interest, serving all audiences with impartial, high-quality and distinctive media content and services that inform, educate and entertain." Ofcom replaced the internal regulation of the BBC Trust as the external and independent regulator of the BBC.

The Digital Economy Act 2017 includes a range of measures designed to support the Government's aim of the UK becoming a world leader in the digital economy. The act seeks to empower consumers and provide better connectivity so that everyone has access to broadband wherever they live; build a better infrastructure fit for the digital future; enable better public services using digital technologies; provide important protections for citizens from spam email and nuisance calls and protect children from online pornography. The bill includes a Universal Service Obligation that will give people the legal right to request a fast Internet connection (minimum speed 10 Mbps) no matter where they live or work.

In 2014 an agreement was made between the Government and the Internet Service Providers (ISPs) including the UK's four largest fixed-line ISPs - BT, Sky, TalkTalk and Virgin Media - to take measures to protect home Internet users from accessing inappropriate content. ISPs are committed to presenting an unavoidable choice, both to new and to existing customers, of whether or not to activate a family-friendly network-level filtering service at the point of set up.

## **Accountability systems**

Aside from UK law, formal media accountability in the UK operates under two parallel systems. Broadcasting (television and radio) has always been subject to external statutory regulation as a condition of being granted a licence to broadcast on the limited broadcasting spectrum. The scarcity of space on the spectrum and roots of radio and television as publicly funded mediums with public interest obligations underpins the rationale for statutory regulation. Today, broadcasting is regulated by Ofcom (see section 3.3). In contrast, newspaper ownership has never been licenced (although mergers are subject to scrutiny by the Secretary of State— see section 3.1) and apart from the requirement to adhere to UK law, the press has been

exempt from external, statutory regulation.

The press has operated under a system of voluntary regulation which can be traced back to the mid 1930s when, following the growth and expansion of the commercial press in the UK, members of the public, politicians and journalists themselves became increasingly concerned about the influence of newspaper proprietors on political debate and the effect that the commercial imperative had on journalism. This prompted, in 1947, the first Royal Commission of the press which looked at ownership and management of the press in the wake of concerns about the quality of journalism in Britain. Despite the fact that there have been seven government commissioned reports into the British press since 1947, press ethics and regulation remains a controversial and highly charged set of debates. The first voluntary press organisation, the Press Council, was founded in 1953 with the aim of maintaining high standards of ethics in journalism. Owing to concern about the ineffectiveness of the Council in the 1990s the Calcutt inquiry was set up to consider whether formal legal powers were needed to effectively regulate the press. Calcutt recommended that self-regulation of the press should be given 'one more chance'. The industry has always been in opposition to any measures which might restrict the freedom of the press, so abided by the inquiry's recommendations. The Press Council was replaced by the Press Complaints Commission in 1995 which claimed its code of practice would ensure more ethical behaviour from its members.

However, following a series of scandals concerning unethical practices and criminality in the British press in 2011, the Leveson Inquiry (2012) was established to examine the culture, practices and ethics of the press by the coalition government in the wake of the public outcry against the unethical practices of the *News of the World* newspaper. Following the Inquiry, Lord Justice Leveson published his report in November 2012 which was highly critical of the way in which the British press had abused its power. He set out recommendations for independent self-regulation of the press that could help correct these excesses. The coalition government and official opposition subsequently developed a framework, consisting of the Royal Charter on Self-Regulation of the Press and related measures in the Enterprise and Regulatory Reform Act 2013 and the Crime and Courts Act 2013, to put these recommendations on a statutory footing.

Leveson's recommendations for a new, statutory supported regulatory system have not yet been fully implemented and are an ongoing source of intense controversy and debate. The main self-regulatory body the Press Complaints Commission was disbanded in 2014 and was replaced by the Independent Press Standards Organisation (IPSO). Two bodies now undertake the challenge of voluntary press regulation: The Independent Press Standards Organisation (IPSO), representing the bulk of the mainstream newspapers and magazines; and newly created body, IMPRESS: The Independent Monitor for the Press (IMPRESS), which at present regulates smaller community-based outlets and new actors within the digital spectrum.

It remains unclear whether the current government will go ahead with the second part of the inquiry, Leveson 2, which is to investigate corporate malpractice and the relationship between the media and the police. The government has also declined to enact another of Leveson's recommendations - section 40 of the Crime and Courts Act 2013. If enacted newspapers would be required to cover the legal costs of a claimant in a libel case unless they were a member of a Leveson-compliant regulator and offered low-cost arbitration. IPSO has stated that it will not comply with the Leveson recommendations, whilst in September 2016 IMPRESS gained official recognition as a Leveson-compliant regulator. However, many national newspapers refuse to join IMPRESS claiming that, despite the independent status of the Press Recognition Panel which appointed it, it is a threat to press freedom. The Guardian and the Financial Times have declined to join either of the regulators and are regulating themselves. Meanwhile, as the rise of digital news media progresses, the need for accountability instruments which are fit for the online environment is evident.

Other accountability measures take place in cross party parliamentary and House of Lords select committees which regularly investigate media related concerns. Such committees invite academics, experts, and the public to submit evidence for consideration. In recent years, these have included inquiries into Fake News, the privatisation of Channel 4, and pay at the

BBC.

Informal accountability activities take place through a range of campaign groups. The UK has developed a strong civil society sector which campaigns to hold the media to account and to highlight the ethical responsibilities of journalism on behalf of the public. Many have charitable status and are set up by concerned journalists, media lawyers, academics and members of the public. One of the first was the Campaign for Press and Broadcasting Freedom formed in 1979 as an independent voice for media reform and to promote a diverse, democratic and accountable media. Others include the Media Standards Trust; MediaWise (ethics); Campaign for Freedom of Information; the Media Reform Coalition; and Hacked Off. As digital media develops, freedom of speech online has become a contentious issue. The Open Rights Group is a digital campaigning organisation which campaigns to protect the rights to privacy and free speech online. NGOs formed to protect the rights of marginalised groups such as Tell Mama and The Runnymede Trust also scrutinise journalism.

## **Regulatory authorities**

Created by the Communications Act 2003, and accountable to Parliament, the Office of Communication (Ofcom) sets and enforces regulatory rules for TV, radio and video-on-demand sectors, fixed-line telecoms (phones), mobiles, postal services, and wireless devices. The government at the time had a preference for 'light touch' regulation and for deregulation of the communications environment to encourage competition. Ofcom's power includes enforcing competition law alongside the Competition and Markets Authority. Ofcom is independent from government and funded by fees from industry and grant-in-aid from the government. Controversially, the BBC was originally almost completely excluded from Ofcom's original regulatory powers. Following the Charter review in 2017, the BBC's internal regulatory board the BBC Trust became defunct and regulation of the BBC now falls entirely to Ofcom. Regulation of "TV like" content was transferred from the now defunct Authority for Television on Demand (ATVOD) to Ofcom at the end of 2015.

Ofcom's role includes securing plurality in broadcasting, protecting the public from harm and offence, unwarranted infringements of privacy, and ensuring the availability of high quality broadcasting of wide appeal. Ofcom is required to enforce a code for television and radio that covers standards in programmes, sponsorship, product placement in television programmes, fairness and privacy. In relation to news and journalism, Ofcom's remit also includes ensuring that broadcast news is reported with due accuracy and impartiality. This includes the exclusion of the views and opinions of the person providing the service (e.g. the journalist and the news programme provider). The Code includes impartiality requirements and other legislation that must be applied at the time of elections and referendums.

There are three tiers to Ofcom's regulation. Tier 1 sets standards in matters such as offence, protection of children, and political impartiality; due impartiality, harm and offence and privacy. Tier 1 applies to all public service broadcasters and all other broadcasters licensed by Ofcom (e.g. Sky and other digital channels). Tier 2 requires Ofcom to set quotas for particular types of output on commercial public service broadcasters (ITV/Channel 3, Channel 4 and Channel 5), such as news, current affairs, and originated productions. These quotas come from the Communications Act 2003. Tier 3 refers to the broader public service remit, quality and diversity, statements of programme policy (children's programmes, arts and religion) – no quotas are set.

Content on the Internet does not fall under the remit of a statutory regulator. As in other countries, recent years have seen much public debate about the future of Internet regulation. The UK government is considering whether to classify providers such as Google and Facebook as publishers in order to hold them responsible for content on their platforms. The Internet Watch Foundation is an independent self-regulatory organisation which was set up in 1996 to provide a hotline for reporting criminal content. The IWF focuses on the removal of child sexual abuse imagery online.



## Sources

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- [Campaign for Freedom of Information](#)
- [Communications Act 2003](#)
- [Department for Digital, Culture, Media, and Sport \(DCMS\)](#)
- [Digital Economy Act 2017](#)
- [Hacked Off](#)
- [IMPRESS](#)
- [IPSO](#)
- [Leveson report](#)
- [Media Reform Coalition](#)
- [Media Standards Trust](#)
- [MediaWise](#) (ethics)
- [Ofcom](#)
- [Open Rights Group](#)

## Education

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### Universities and schools

There are many routes into journalism in the UK including degrees, Masters, diplomas, short courses and work experience. Schools of Journalism tend to offer short courses and postgraduate diplomas. Journalism departments and media and communication departments at UK universities provide hundreds of journalism programmes at undergraduate and postgraduate level. 75 universities offer over 400 undergraduate degrees which include Journalism in their titles. Hundreds of masters level journalism programmes are available.

Courses range from general journalism to specialised courses in multimedia, magazine, sports, music, broadcast and other specialised forms of journalism. Most BA Honours degrees are for a duration of 3 years and many, particularly those that are accredited, include a period of work experience in a news organisation. Masters and Postgraduate diplomas in journalism take between 9-12 months. Shorter 4 month courses are run by organisations such as the Press Association. The majority of journalism courses that intend to train 'industry ready' graduates are accredited by either the BJTC or the NCJT. Journalism education at UK universities varies in terms of the balance between theory and practice (vocational skills). Courses at Russell Group universities tend to provide a mix of research led theory with practice. Courses at newer universities tend to focus on developing practical skills.

A degree was not traditionally required to enter the journalism profession in the UK, but in line with worldwide trends there is an 'academisation' of journalism with 86 percent of journalists having an undergraduate degree. This rises to 98 percent of journalists who have entered the industry in the last 3 years. Only 41 percent have a degree in journalism although this rises to 64 percent of those who have entered the profession between 2010 and 2015. The larger news organisations operate their own recruitment and training programmes, with some offering apprenticeships. Some programmes actively seek to address

issues of diversity within newsrooms or to provide media training aimed at community journalists.

## Professional development

There is no official requirement for journalists to complete training courses as part of continued professional development. News organisations however do provide in house training to develop new skills such as those required for social media. The BBC Academy provides training to BBC journalists and shares much of these resources with the wider UK broadcasting industry for free.

A Reuters Institute report 'Journalists in the UK' shows that at 45 percent the proportion of women within journalism is relatively good compared to some other countries. However, once other factors such as seniority, employment status and salary is taken into account, data from 2015 shows that inequalities remain. The gender pay gap has been controversial in the UK in 2017-2018 with female journalists being paid less than men for doing the same job. Women are less likely to progress to senior roles and to be paid high salaries. Only 18 percent of women who have over 20 years' experience occupy senior management roles compared to 37 percent of men with the same experience. Diversity is also lacking with only 6 percent of journalists coming from a non-white background.

## Sources

- [BBC Academy](#)
- [BJTC](#)
- [NCTJ](#)
- [Whatuni](#) (search engine of UG courses)

## Traditional forms of communication

### Summary

### Sources

## Conclusions

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### Conclusion

In common with many other countries, the media in the UK is undergoing a period of transformation. Perhaps the biggest challenges arise from the changes in consumption, the uncertainty over the sustainability of the press at local, regional and national levels, and the continuing controversial reforms to the system of self-regulation of the press.

In addition, the UK press faces a significant challenge to regain the trust of the public and is the least trusted in Europe. A YouGov survey in 2017 established that almost one third of British adults (32 percent) believe that no type of news – from

politics to crime – is reported accurately, honestly and without bias in British newspapers. Within this context, the BBC emerges as one of the most trusted news brands in the latest global Reuters Digital report with two-thirds of its users (70 percent) stating it is ‘best for’ accurate and reliable news.

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