

# Media Reform Coalition Who Owns the Media? report March 2021

## Appendix 1. Methodology for Estimated Average Print Circulation, 2020

In January 2020 Telegraph Media Group (publishers of the Daily Telegraph and the Sunday Telegraph) announced that the company had withdrawn from submitting average circulation figures to the Audit Bureau of Circulations (ABC). In April 2020 News UK (publishers of the Sun, The Times, the Sun on Sunday and the Sunday Times) also pulled out from reporting its circulation figures, opting instead to focus on PAMCo measures of total print/online brand reach.<sup>1</sup>

In order to calculate estimated circulation figures for these papers, and by extension analyse their parent companies' market shares for 2020, this research uses existing ABC data to extrapolate each title's potential circulation changes month-by-month. These projections are based on industry-wide trends in ABC data going back to January 2017, and use each title's historical performance against the national newspaper industry average to estimate its changing circulation for each month since withdrawing from ABC auditing.

### Difference between monthly circulation change and average daily/Sunday market change, 2017 to 2020

The Sun	The Times	Daily Telegraph	Sun on Sunday	Sunday Times	Sunday Telegraph
-0.054%	0.225%	-0.336%	0.141%	0.414%	-0.087%

The above figures represent how well each paper performed compared to the average circulation change of its respective daily or Sunday newspaper market. For example, between January 2017 and March 2020 the Sun's monthly change in circulation was on average 0.054% lower than the rest of the national daily market. Performance figures for the Daily Telegraph and Sunday Telegraph only cover until December 2019, as this was the last month these papers submitted circulation data to ABC. These are used to estimate each paper's circulation figures, first by calculating an estimated monthly circulation change:

<sup>1</sup> <https://www.pressgazette.co.uk/end-of-the-abcs-uk-news-publishers-to-keep-circulation-data-private-as-covid-19-crisis-hits/>

$$\begin{aligned}
 &\text{Estimated monthly circulation change} \\
 &= \\
 &(\text{Average circulation change of reporting ABC papers}) \\
 &+ \\
 &(\text{Paper's average performance difference})
 \end{aligned}$$

E.g. Daily Telegraph estimated change, Jan 2020 = -0.006% (dailies avg.) + -0.336% = -0.342%

This estimated monthly circulation change is added onto the previous month's available circulation figure. The tables below list the resulting monthly circulations for the News UK and Telegraph Media Group papers calculated using this method. Each set of estimated circulations begins from the month after the parent company withdrew from ABC auditing, with the last available submitted ABC figures indicated in brackets.

	The Sun		The Times		Daily Telegraph		Average change, ABC dailies
	Circulation	Est. change	Circulation	Est. change	Circulation	Est. change	
Dec-19					(317,817)		
Jan-20					316,731	-0.34%	-0.01%
Feb-20					308,962	-2.45%	-2.12%
Mar-20	(1,210,915)		(365,880)		305,666	-1.07%	-0.73%
Apr-20	916,790	-24.29%	278,028	-24.01%	230,559	-24.57%	*-24.24%
May-20	900,367	-1.79%	273,821	-1.51%	225,778	-2.07%	-1.74%
Jun-20	914,771	1.60%	278,963	1.88%	228,753	1.32%	1.65%
Jul-20	955,134	4.41%	292,048	4.69%	238,201	4.13%	4.47%
Aug-20	1,012,280	5.98%	310,334	6.26%	251,781	5.70%	6.04%
Sep-20	1,075,586	6.25%	330,605	6.53%	266,817	5.97%	6.31%
Oct-20	1,088,229	1.18%	335,411	1.45%	269,200	0.89%	1.23%
Nov-20	1,075,512	-1.17%	332,424	-0.89%	265,295	-1.45%	-1.12%
Dec-20	1,083,422	0.74%	335,794	1.01%	266,497	0.45%	0.79%

\*Note: For April 2020, the average circulation change of ABC reporting daily papers is modified to exclude Metro. This is because Metro's circulation changed by -69.93% from

March to April (primarily due to the national Coronavirus lockdown), making it a significant outlier for calculating a sector-wide daily newspapers average.

	Sun on Sunday		Sunday Times		Sunday Telegraph		Average change, ABC Sundays
	Circulation	Est. change	Circulation	Est. change	Circulation	Est. change	
Dec-19					(248,288)		
Jan-20					245,596	-1.08%	-1.00%
Feb-20					240,774	-1.96%	-1.88%
Mar-20	(1,013,777)		(647,622)		242,070	0.54%	0.63%
Apr-20	877,361	-13.46%	562,245	-13.18%	208,945	-13.68%	-13.60%
May-20	922,331	5.13%	592,600	5.40%	219,178	4.90%	4.98%
Jun-20	936,253	1.51%	603,163	1.78%	221,987	1.28%	1.37%
Jul-20	921,660	-1.56%	595,410	-1.29%	218,020	-1.79%	-1.70%
Aug-20	914,732	-0.75%	592,560	-0.48%	215,884	-0.98%	-0.89%
Sep-20	930,722	1.75%	604,537	2.02%	219,166	1.52%	1.61%
Oct-20	926,723	-0.43%	603,591	-0.16%	217,725	-0.66%	-0.57%
Nov-20	938,396	1.26%	612,842	1.53%	219,971	1.03%	1.12%
Dec-20	922,895	-1.65%	604,393	-1.38%	215,835	-1.88%	-1.79%

In addition to these estimated circulation figures—combining individual paper performance and industry-wide trends—News Corp (the parent company of News UK) provides an internal figure for the circulation of its own papers in its 2020 Annual Report.<sup>2</sup> These figures represent average circulation for the six month period January to June 2020, and allow for direct comparison between the MRC estimates detailed above and News Corp's own numbers:

Jan – Jun 2020	The Sun	Sun on Sunday	The Times	Sunday Times
News Corp	1,093,861	934,247	322,117	609,162

<sup>2</sup> <https://newscorp.com/wp-content/uploads/2020/10/news-corp-2020-annual-report.pdf> (pg. 10)

Jan – Jun 2020	The Sun	Sun on Sunday	The Times	Sunday Times
MRC est.*	1,066,679	983,073	320,930	614,051
(difference)	27,182	48,826	1,187	4,889
(% difference)	-2.48%	5.23%	-0.37%	0.80%

\*Note: MRC estimates for Jan-Jun 2020 include the three months of official ABC circulation figures submitted by these papers from Jan-Mar.

The above table shows the variance between the MRC estimated circulations for News UK newspapers. It suggests that the MRC methodology slightly overstated average circulation for the Sun on Sunday and understated figures for the Sun.

These numbers also allow for modifying the MRC estimates for April, May and June to more accurately reflect News Corp's stated average circulation for the first six months of 2020. This is achieved by:

- Multiplying the News Corp circulation figures by 6, to get the combined average circulation for the Jan-Jun period.
- Adding the difference between this figure and the combined MRC estimates (Jan-Jun) on to the estimated circulation figures for April, May and June.

The average combined MRC + News Corp results return the same monthly average as stated in the News Corp annual report, ensuring that the MRC estimated months are both an accurate reflection of industry-wide trends and calculated based on all available data.

	The Sun			The Times		
	MRC est.	News Corp	Combined est.	MRC est.	News Corp	Combined est.
Average	1,066,679	<u>1,093,861</u>	<b><u>1,093,861</u></b>	320,930	<u>322,117</u>	<b><u>322,117</u></b>
Total (Jan-Jun)	6,400,072	6,563,166	<b>6,563,166</b>	1,925,580	1,932,702	<b>1,932,702</b>
Jan (ABC)	1,250,634		<b>1,250,634</b>	368,929		<b>368,929</b>
Feb (ABC)	1,206,595		<b>1,206,595</b>	359,960		<b>359,960</b>
Mar (ABC)	1,210,915		<b>1,210,915</b>	365,880		<b>365,880</b>
Apr	916,790	<b>+54,365</b>	<b>971,155</b>	278,028	<b>+2,374</b>	<b>280,402</b>

	The Sun			The Times		
	MRC est.	News Corp	Combined est.	MRC est.	News Corp	Combined est.
May	900,367	<b>+54,365</b>	<b>954,732</b>	273,821	<b>+2,374</b>	<b>276,195</b>
Jun	914,771	<b>+54,365</b>	<b>969,135</b>	278,963	<b>+2,374</b>	<b>281,337</b>
	Dif	163,094		Dif	7,122	
	Dif / 3	<b>54,365</b>		Dif /3	<b>2,374</b>	

	The Sun on Sunday			Sunday Times		
	MRC est.	News Corp	Combined est.	MRC est.	News Corp	Combined est.
Average	983,073	<u>934,247</u>	<u><b>934,247</b></u>	614,051	<u>609,162</u>	<u><b>609,162</b></u>
Total (Jan-Jun)	5,898,440	5,605,482	<b>5,605,482</b>	3,684,305	3,654,972	<b>3,654,972</b>
Jan (ABC)	1,042,193		<b>1,042,193</b>	645,108		<b>645,108</b>
Feb (ABC)	1,022,485		<b>1,022,485</b>	633,567		<b>633,567</b>
Mar (ABC)	1,013,777		<b>1,013,777</b>	647,622		<b>647,622</b>
Apr	877,361	<b>-97,653</b>	<b>779,708</b>	562,245	<b>-9,778</b>	<b>552,468</b>
May	976,672	<b>-97,653</b>	<b>879,019</b>	592,600	<b>-9,778</b>	<b>582,822</b>
Jun	965,953	<b>-97,653</b>	<b>868,300</b>	603,163	<b>-9,778</b>	<b>593,385</b>
	Dif	-292,958		Dif	-29,333	
	Dif / 3	<b>-97,653</b>		Dif /3	<b>-9,778</b>	

These combined MRC + News Corp monthly circulation estimates are re-applied to the 2020 average figures for each of the Telegraph Media Group/News UK newspapers, to give the following results as listed in the main report:

Dailies	2019 average	2020 average	Sundays	2019 average	2020 average
The Sun (MRC)	1,293,048	1,102,263	Sun on Sunday (MRC)	1,087,529	917,018
Daily Mail	1,173,486	1,028,879	Mail on Sunday	985,966	894,207
Metro	1,421,946	754,922	Sunday Times (MRC)	679,420	600,811
Daily Mirror	482,683	397,379	Sunday Mirror	396,697	327,251
The Times (MRC)	388,212	323,817	Sunday Telegraph (MRC)	257,776	223,763
Daily Telegraph (MRC)	327,553	264,520	Sunday Express	266,392	229,148
Daily Express	307,542	258,665	Observer	160,327	146,004
Daily Star	307,799	243,474	Daily Star Sunday	184,029	148,933
The i	227,419	163,417	Sunday People	150,904	127,728
Guardian	132,482	115,626			
Financial Times	169,366	108,809			

Further details on the raw ABC data and projection calculations used here are available in the accompanying data sheets.