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PUBLIC SERVICE MEDIA IN THE UNITED KINGDOM: A STRONG PUBLIC SECTOR WITH AN UNCERTAIN FUTURE

Abstract

The current popularity of both radio and television services in the United Kingdom which are run on a not-for-profit basis, be they operated by the BBC or to a much lesser extent by the state-owned Channel 4, attests to the strength of public service broadcasting there. Largely – as this article seeks to explain – the strengths of the BBC and the influence of the public service ethos even in the way mainstream private-sector broadcasting, especially television, is regulated, can be attributed to the importance placed upon public service media right from the 1920s. Even in this pluralistic, multi-platform, age of media proliferation, the effects can be seen of the early establishment of clear objectives and standards for the sector by its founders, which have been largely maintained by their successors. There have been many pressures on the BBC and its supporters in public life to cede territory to the commercial sector, but although change has in some respects been inevitable, the corporation's funding model and constitution have served the population well in bolstering the BBC against such attacks on its ability to function as an important bulwark of quality broadcasting and freedom of expression in democratic society. This is not merely a matter of territory, though, of spectrum allocation and the distribution of resources. It is also about public perceptions of the BBC and its output, the trust it enjoys among its audiences and the resultant brand loyalty upon which it ultimately depends and which is firmly rooted in quality and inclusiveness. This public sector ethos has, however, almost inevitably been weakened since the 1920s, as increasingly strident voices have lobbied for greater opportunities for the private sector to generate as much profit as possible from broadcasting have gained greater traction at certain critical points in the history of broadcasting, as is now also the case in 2016.

Key words: radio, television, regulation, ownership, digital, DAB

Introduction

The relative strength of the public service media in the United Kingdom, even in this pluralistic, multi-platform, age of media proliferation, can be attributed mainly to the British Broadcasting Corporation and the early establishment of clear

objectives and standards for the sector by its founders, which have been largely maintained by their successors. There have been many pressures on the BBC and its supporters in public life to cede territory to the commercial sector, but although change has in some respects been inevitable, the corporation's funding model and constitution have served the population well in bolstering the BBC against such attacks on its ability to function as an important bulwark of quality broadcasting and freedom of expression in democratic society. This is not merely a matter of territory, though, of spectrum allocation and the distribution of resources. It is also about public perceptions of the BBC and its output, the trust it enjoys among its audiences and the resultant brand loyalty upon which it ultimately depends and which is firmly rooted in quality and inclusiveness.

An example of this is the BBC's main offer for young people, under the sub-brand of BBC Radio 1. As a twenty-four hour analogue and digital radio service of mainly popular music aimed at a core target audience of 15-29 year olds, this is a frequent target of those who would see the BBC reduced in size by the privatisation of some of its more popular, and therefore more potentially profitable, services so that the audiences they currently attract could be monetised by sections of the private, commercial sector of British broadcasting, or even by new entrants into the market. The counter argument to such a proposition, though, is one that is frequently articulated by the current controller of the network, Ben Cooper, when he explains the differences he perceives between Radio 1 and the existing radio offer of the commercial radio sector (Glennie 2014) as typified by Capital, one of the quasi-national brands operated by the country's largest commercial radio group, This is Global Limited, trading as Global Radio. Radio 1 has had in recent years to respond to increased commercial competition by emphasising and reinforcing its decidedly public service credentials through its distinctive music policy, with a playlist several times larger than that of any of the commercial stations, a focus on showcasing new music that involves breaking – or at least providing exposure for – little known artists and bands, and the inclusion in its programming of large amounts of produced speech, (such as music, health, lifestyle and sociological documentaries) which the commercial sector would not and does not broadcast on any significant or sustained basis.

Playing 65 hours of specialist music per week, Radio 1 also takes very seriously its responsibility as a public service broadcaster to support its young audiences with informative and motivational on-air campaigns aimed at promoting healthy lifestyles, warning of dangers inherent in addiction, reckless promiscuity or self-abuse of various kinds, and providing advice to victims of abuse by others – while at the same time maintaining its street credibility with those audiences. It also broadcasts two daily 15-minute-long news programmes in daytime, at a time when hourly news bulletins in the commercial sector continue to dwindle in length to often derisory durations. Reaching those audiences of so-called 'digital natives' requires a sophisticated approach which involves connecting with them through a variety of platforms, including not only the now almost ubiquitous web

site, but also a focus on social networking, a significant presence on the BBC's popular iPlayer streaming and on-demand service and a YouTube channel with a million and a half subscribers. The station also invests resources into producing subtly self-promotional videos in the hope that they will 'go viral', as it is very conscious of the heightened networking and sharing habits of its target demographic. Each year the Radio 1 Big Weekend brings free outdoor concerts to live audiences in different locations around the UK, often in regions unaccustomed to hosting large music festivals. There is also a parallel, complementary digital-only station, Radio 1Xtra, which is less well-resourced roughly in proportion to its inevitably smaller audiences, but which also reflects in its broadcast output and parallel online and mobile device manifestations the public service ambition to provide a good deal of content that the commercial sector will not.

1. The development of public service media in the UK – radio past and radio present

Radio 1 is discussed here simply as an example of how the BBC often interprets the public service media ethos within the context of delivering popular services to large audiences. It is not an isolated case, and indeed the only exception to this model in its various radiophonic forms could arguably be the classical music and cultural radio network, BBC Radio 3, which occupies one of the corporation's four analogue FM national frequency allocations but struggles to achieve audiences above two million listeners of adults aged 15 or over, and is not represented at all in table 1, which shows the weekly reach and share of listening figures for the UK's most listened-to radio stations (RAJAR 2014). Often seen as providing a public service for a single cultural elite, the network also supports the BBC's orchestras and includes original, often fairly highbrow, drama among its output. In its often very cerebral approach to classical, but also jazz and 'world' music, it makes few concessions to the inevitable rivalry for audiences it faces from Global's Classic FM, which is ranked seventh in table 1. In fact, Classic FM is as unlike Radio 3 as Capital is unlike Radio 1, and in many ways that is for similar reasons. The commercial station, while focusing on a core output of popular classical music, running on high rotation and often sequenced in sales chart order, does offer some support to independent orchestras, mainly in terms of publicising performances. Its presentation is rarely, if ever, particularly erudite and certainly not cerebral, but instead it is intentionally popular and inclusive, and the repetition of particularly popular works – or more familiar extracts from them – has built a sizeable audience, even popularising many classical compositions that would otherwise struggle to find mass audiences if confined to what would inevitably be a much slower rotation on Radio 3.

Table 1. Headline radio listening data for the UK's most-listened-to radio services, Q1 2014

| Weekly | Reach (1.000s) | Share (%) |
|------------------|----------------|-----------|
| BBC Radio 2 | 15.568 | 17,9 |
| BBC Radio 4 | 10.954 | 12,2 |
| BBC Radio 1 | 10.532 | 6,7 |
| Heart | 9.126 | 6,2 |
| BBC Radio 5 Live | 6.174 | 4,1 |
| Capital | 7.319 | 4,0 |
| Classic FM | 5.307 | 3,3 |
| Smooth | 4.311 | 3,2 |

Source: RAJAR

The BBC's other national networks, though, do achieve some of the largest audiences in this population of 53 million 15+ adults. BBC Radio 2, the popular music station for older listeners, is the network to which the corporation has, since the last major reorganisation of its national radio provision in 1967, hoped maturing Radio 1 listeners would naturally migrate. It is the clear leader in this radio market, with a mix of popular music in daytime and comedy, specialist music and documentaries in the evenings and at weekends. Second placed in order of audience size is the mostly-speech station, BBC Radio 4, which is driven by news and current affairs at breakfast, lunchtime and afternoon drive time, but which also features many hours of high production value 'built' discussion, comedy, drama, soap opera and documentary programmes in a very popular schedule which is linked by formal continuity announcements and almost hourly news bulletins, and with which network controllers tamper at their peril because they know how many complaints from listeners even the simplest of programme changes would provoke. Starkey (2004: 26) recalls the objections raised in response to moves in 1991 to displace the general programming in favour of permanently extending the news and current affairs coverage outside its existing slots, and Hendy's history of Radio 4 records more such instances (2007). That some of the BBC's audiences cherish its output so much that they so often resort to protest in response to change, demonstrates in part some of their great affection for the corporation's output, which in turn clearly contributes to its market leadership of radio broadcasting. BBC Radio 5 Live's ranking below another of Global's quasi-national commercial brands, Heart, may be partly attributed to that network's analogue broadcasting being confined to the AM waveband and its consequent absence from FM except as an overnight relay on some of the BBC local radio stations. Its diet of news talk and sport, as interruptible for coverage of breaking news as for premium-event live sport commentary, does however, beat both Capital and Smooth in the ratings. The popularity of the BBC is also re-

flected in its domestic web site bbc.co.uk being one of only two broadcasting organisations, (as opposed to BT whose core business is as a phone and broadband provider,) to feature in the Alexa chart listing of the top 40 UK websites (2015). They are the BBC, placed seventh, and the premium-channel satellite television operator BSkyB, whose sky.com is twenty-ninth.

How is it, then, that the BBC has the resources to consistently beat the commercial radio sector's mainly music offer in the audience ratings? Or might it simply be that the commercial sector is constrained in some way that still prevents it from taking on the BBC on equal terms? In needing to justify its funding and its still protected status in the broadcasting landscape of the UK, the BBC puts considerable effort into reinforcing and publicising the many public service aspects of its output, as we have already suggested in our very brief introductory overview. In the now fiercely competitive context of today's media industries, in order to preserve its public funding and protected status, especially as the royal charter under which it is legally constituted is reviewed every ten years, and has been since it was first established as a public corporation in 1927, the BBC must now demonstrate more clearly than ever before the many ways in which it serves a public need with content in which the commercial sector would not invest. However, it was not always so. Radio 1, for example, was conceived with very different intentions when in 1967 the then government was legislating against offshore pirates, such as Radios Caroline, London and 390, which had proven very popular with audiences that the BBC had not previously known existed for all day long transmission of pop music sequences presented by live on-air personalities then known as disc jockeys. In 1964, the private sector had spontaneously provided a service the BBC did not wish to provide, but three years later the BBC was acting on the will of the government to close down the private sector pop pirates and replace them with something similar that presented few of the challenges of the unauthorised broadcasts from outside British territorial waters.

There are various accounts of the history of the BBC since its origins in the first private radio services of the early 1920s set up by receiving equipment manufacturers in order to create public demand for their receivers. Among them are the extensive works of Asa Briggs, detailed volumes chronicling in detail almost every era of the BBC and beginning with the birth of broadcasting (1961). Then there are more concise overviews, such as those of Crisell (1997) and Street (2002). Some more specialised histories have been written, too. For example, a former radio regulator turned radio scholar, Tony Stoller, traced the development of the UK commercial sector (2010), Baron provided an almost contemporaneous account of a particular era (1975) and the former radio producer David Hendy devoted years to trawling through the BBC archives at Caversham, researching the history of Radio Four (2007). Starkey (2015) concentrates on the rise and fall of *local* radio, both BBC and commercial, while Rudin (2011) discusses some contemporary issues relating to both radio and television broadcasting in the United Kingdom. All tend to agree that of great significance in this story was the official monopoly of radio broadcast-

ing on the mainland accorded to the BBC until as relatively recently as 1973. Of particular interest to this current discussion is the detailed analysis by David Hendy of the public service imperative which both inspired and led the BBC from the days of its first director general, John Reith, to, in more modern terms, the present (2013).

In the 1920s the British 'establishment' wanted to keep the new medium of radio free of commercial influences precisely so it could fulfil a 'public service' remit without the distortions and constraints upon it that inevitably, it was widely thought, would be unintended consequences of private ownership and funding through advertising and sponsorship. Even though commercial television began broadcasting in the UK in 1955, this high ambition for radio persisted until the Sound Broadcasting Act 1972 paved the way for the first licensing of mainland commercial radio to enable the first such *local* stations to begin broadcasting to London in 1973. The 'arms-length' (from the government) royal charter arrangement and the financing of public service broadcasting through a receiving licence fee payable by households, initially for the use of a radio, or 'wireless' receiver, and then for the use of a television receiver, provided, as far as most decision makers were concerned, a suitable mechanism for ensuring the independence of the BBC. Despite the brief, transnational incursions into the airwaves of the UK by the advertising and sponsorship-funded 'continental' broadcasters of the 1930s, (such as Radios Luxembourg, Normandy, Lyon and Côte d'Azur,) the persistence of Radio Luxembourg in broadcasting an evening English language service into Britain until the 1990s, an imitator broadcasting from the republic of Ireland throughout the 1990s, Atlantic 252, and of course the offshore pirates, the BBC's *official* monopoly persisted until the breakdown of a previously unassailable political consensus led to the introduction of Independent Local Radio (ILR) in 1973.

Nonetheless, in that ideologically-motivated concession to the private sector of the introduction of a network of up to sixty ILR stations intended to challenge the BBC with new competition in the provision of radio services, there persisted a cautious approach to abandoning the political establishment's by then very well-established ambitions for broadcasting as a public service. The privately-owned franchisees entrusted with the very first ILR licences had to demonstrate and adhere to some considerable public service commitments around the provision of a 'full service' in their content to a wide range of demographic and interest groups within their editorial areas. This was most obvious in the amount of news they were required to produce and broadcast, the nature of the speech items they integrated within their music programming and the specialist programmes they included on the margins of their schedules, which are further discussed in a detailed analysis of the programme listings of the 1970s in Starkey (2015: 63-76). This meant many of the early independent stations struggled to be profitable, and as the network grew and a snowballing of mergers and acquisitions from the mid-1980s onwards led to the formation of relatively powerful groups of ILR stations, their increasingly vocal campaigning against rules on ownership and tight regulation led to a significant relaxation of

both. Stoller (2010) and Starkey (2015) chart in different ways the growth of the UK commercial radio sector well beyond the initial 1972 proposals for up to sixty stations and the ways in which the initially very strong regulation of the sector by the Independent Broadcasting Authority (IBA), requiring each station to broadcast extensive public service content, was replaced by 'light touch' regulation by the Radio Authority (1991-2003), which relieved them of all but very few public service obligations, and then from 2003 by the Office of Communications (Ofcom) which opened the way for increased syndication and automation of programming and the dilution of news output in terms of breadth and depth of coverage, as well as removing the original requirement to maintain local newsrooms inside their editorial areas.

Table 2 shows the rapid growth in the number of licensed *commercial* analogue radio stations in the UK on AM and FM under the Radio Authority, compared to very little expansion of the number of BBC national, regional and local radio services over the same period. Unsurprisingly, the expectation in the commercial sector as it began to grow was that before long it would achieve sufficient coverage of the main population centres of the UK, and through duplication in the most populous areas offer so great an element of choice to audiences almost everywhere in the country, that its weekly share of radio listening would overtake that of the BBC. Figure 1 uses data from first JICRAR, and then its industry 'gold standard' successor body RAJAR, to show the commercial sector's audience share was indeed very briefly greater than the BBC's, between 1997 and 1998. Since then the BBC has consistently maintained a decisive lead over the commercial sector, so that in the first quarter of 2014 its share was 54,9%, compared to 42,0% for the commercial sector, with the balance being accounted for by 'other listening' (RAJAR 2014). This disparity cannot be accounted for by the commercial sector being limited to local radio stations, because three national commercial stations were launched in the 1990s, (although two of the three were disadvantaged by their allocation of only AM frequencies, and the original licensing terms of all of them deliberately imposed format restrictions that would prevent them directly challenging the BBC's Radios 1 and 2). Nonetheless, the speech station now branded as TalkSPORT achieved a reach of only 3,196 millions in the first quarter of 2014, little more than half the audience of BBC Radio 5 Live, and a share of only 2%, compared to the 4,1% share of 5 Live. Both stations broadcast their analogue transmissions only on AM and both have national coverage, but the BBC station has almost twice as many listeners.

The commercial sector's challenge to BBC Radios 1 and 2 is not now restricted to the national popular music AM station, Absolute Radio, either. On FM there are several clear 'quasi-national' challengers to the BBC's popular music networks in the form of Heart, Capital and Smooth. They are all brands operated by Global which exploit the latitude given them by Ofcom to syndicate programming and share branding across a large number of what were once independent local or regional licences, but which have now lost almost all of their original local or regional identities (Starkey 2015: 156-59). By strategically spreading these three brands

across the FM licences they control, Global have managed to achieve almost national coverage for all three, yet the combined share of listening of the three services amounted to only 13,2% in the first quarter of 2014 (table 1). This compares with a share of 17,9% for BBC Radio 2 and 6,7% for BBC Radio 1. Before this consolidation took place, the lower share of listening of the commercial sector could easily be attributed to a lack of diversity in programme formats and duplication in music playlists on stations with overlapping transmission areas (Starkey 2003). Now there are more competing radio services than ever and the BBC faces a newly aggressive commercial sector, following the major consolidation and homogenisation of local commercial stations into Global Radio's quasi-national brands which operate alongside a number of other radio groups in the commercial sector, including the second largest, Bauer Media. Yet, in the UK the available audiences still seem to prefer the public-service motivated offer of the BBC to the profit-oriented offer of commercial radio.

Table 2. Growth of licensed analogue radio stations in the UK on AM and FM

| In Q1 | All commercial | All BBC (national/regional/local) |
|-------|----------------|-----------------------------------|
| 1982 | 40 | 4/3/22 |
| 1991 | 115 | 5/4/39 |
| 1996 | 172 | 5/5/41 |
| 1997 | 183 | 5/5/41 |
| 1998 | 201 | 5/6/41 |
| 1999 | 225 | 5/6/41 |
| 2000 | 246 | 5/6/40 |
| 2001 | 255 | 5/6/41 |

Source: Radio Authority and BBC

There is one final issue regarding the relative success of public service and commercial radio in the UK, and that is digital migration – particularly to the basic Eureka 147-standard DAB network of one national and one commercial national multiplex and a network of local multiplexes shared between the commercial and BBC local and regional services. Table 3 shows the significant trend towards DAB adoption by audiences, with the DAB digital radio transmitter platform considerably ahead of the longest-established alternatives, listening through digital television platforms and the internet. Mobile device listening, whether through integrated tuners or on-board applications is growing, but suggested a *monthly* reach of 36%, rather than a significant share. However, for the purposes of this discussion, this clear migration to digital listening is having a levelling effect upon the oppor-

tunities for the BBC and the commercial sector to reach potential audiences. Even those national commercial services on AM, TalkSPORT and Absolute Radio, are now able to achieve near national coverage with almost studio-quality signals, so the effect of previously being confined to AM is now being progressively weakened. In addition, the commercial sector broadcasts a much larger range of digital-only alternatives than the BBC, with a number of variants of Absolute Radio based on musical era or genre and such niche services as Gold, Planet Rock, XFM, LBC, Heat and Kiss widely available on DAB.

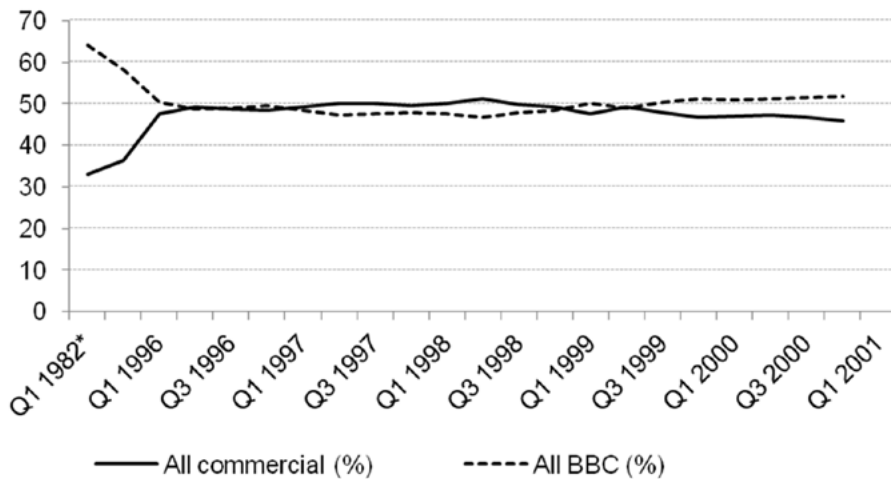


Figure 1: Share of all radio listening

Source: RAJAR/ICRAR 1982 excluding BBC regional stations and Radio Luxembourg

Table 3. Digital radio listening platform data for all UK radio

| Share of radio listening % | On any digital platform | On DAB | Through any digital television platform (Sky, Freeview, Freesat) | Internet |
|----------------------------|-------------------------|--------|--|----------|
| 2014 Q1 | 36,6 | 23,7 | 5,0 | 6,4 |
| 2008 Q4 | 18,3 | 11,4 | 3,2 | 2,0 |

Source: RAJAR

2. The development of public service media in the UK – along came television

In 1936 the BBC began an experimental television service, but suspended it for the duration of the second world war (1939-45). Reith had been unenthusiastic about this new medium and it was not seen as essential at a time of emergency, while of course radio provided national coverage and required relatively less cumbersome production facilities. Once resumed as a regular service, it began to attract more resources, so that by 1950 BBC Television was broadcasting 30 hours per week and by 1955 that had increased to 50 hours per week. It is generally recognised that the new service most effectively demonstrated its potential by televising the 1953 coronation, and as ordinary people gathered around their neighbours' television sets to see for themselves such an otherwise exclusive event, many of them quietly resolved to be the next in their street to embrace this new technology. Despite Reith's departure from the BBC it was natural that the public service values of the corporation's radio broadcasting should influence the output of its single television channel. However, in the different political climate of the early 1950s and in the absence of the caution exhibited by the establishment when strategic decisions were being taken in the 1920s over the nature of radio broadcasting, there was less natural antipathy towards allowing an advertising-funded private-sector television service to begin broadcasting in competition with the BBC.

The launch of Independent Television (ITV) in 1955 was especially significant, though, because even though it was at first only available in the most populous regions of the UK, it was the single act which ended the BBC's previously unassailable legal monopoly of domestic broadcasting to the mainland. ITV was not initially the one large, almost national, company it became in 2004 under a significant relaxation of the then legislation on ownership. Instead, and in order to prevent any commercial television company becoming too dominant in the market, it consisted of a network of licensees that were financially independent of each other, with extensive programme sharing to enable them to fill the broadcasting hours with programmes made with reasonable production values and some of them even sharing transmission rights to cover a region, under a weekend/weekday split of the available airtime. ITV was given a number of public service requirements to meet, especially over news, documentaries, investigative journalism and regional factual programming (Fitzwalter 2008), in much the same way as ILR was made to perform to certain high expectations around content that could be seen as providing a public service, rather than merely entertaining its audiences, 18 years later.

The original regulator of this fledgling commercial television sector was the Independent Television Authority (ITA), which in turn became the IBA when it was later given an additional responsibility for radio. In the same way as with radio, though, successive regulators, each with its regulatory powers and functions reigned in a little further by ever more permissive legislation, have progressively re-

laxed the regulatory requirements upon the ITV companies to the extent that the network now broadcasts comparatively little public service content. It does, though, continue to broadcast regional news programmes after its extended early evening news programme, which means the UK still benefits from pluralism in regional television news – unlike France, for example, where only the state-owned France Télévisions provides such a service on its France 3 channel. However, we are now living in a multi-channel age, in which not only does the BBC run more than one television service, but so does ITV and so do their many competitors who broadcast on terrestrial, satellite and IPTV platforms. Several television news channels currently broadcast to the UK, and among them it is clear that BSkyB persists with the relatively expensive Sky News because of the reputational value providing loss-making rolling news as a public service brings to the wider brand. Table 4 shows reach and share data for the UK's most watched television channels in a week in May 2014, and again it is the BBC with its two main full-service channels that is the market leader among them.

Table 4. Headline television viewing data for the UK's most-watched channels, May 19-25, 2014

| Weekly | Reach (1.000s) | Share (%) |
|-----------|----------------|-----------|
| BBC1 | 44.262 | 21,5 |
| ITV | 36.431 | 12,2 |
| BBC2 | 30.249 | 5,3 |
| Channel 4 | 32.442 | 4,9 |
| Channel 5 | 27.176 | 3,8 |
| ITV3 | 10.142 | 2,2 |
| ITV2 | 18.240 | 2,0 |

Source: BARB

After the launch of BBC2 in 1964, the only two national terrestrial analogue channel launches before the completion of the digital terrestrial switchover in 2012 were of Channels 4 (1982) and 5 (1997), (although an independent Welsh language channel, S4C, launched in Wales instead of Channel 4). Both of these were given limited public service requirements, and in the case of the privately-owned Channel 5 this related to the provision of 'high quality and diverse' programming, which is mainly interpreted by its successive owners as meaning an extended weekday news programme and popular documentaries in the early evenings. Channel 4, however, was constituted quite differently, as a non-profit public sector broadcaster operating outside the BBC – largely for political reasons because the still rela-

tively new Thatcher government agreed with the public service rationale for creating a fourth national channel but rejected the idea that it should be an extension to the BBC. Channel 4's public service brief includes an emphasis on innovation in programming and it was itself innovatory because of the publisher-broadcaster role it was given in order to stimulate an independent television production sector of privately-owned, relatively small-scale companies from whom it would commission original production, rather than producing programmes itself. Most recently, a small number of cities or sub-regions have begun to benefit from the introduction of small-scale local television which launched in 2014, meaning such services as London Live and Made in Tyne & Wear have been given preferential positions on the electronic programme guide (EPG) of the country's most popular television platform, the digital terrestrial broadcaster Freeview (see table 5), in return for including in their schedules a certain amount of local programming that could be described as public service in nature.

Even if we disregard the BBC, ITV and Channel 4 derivatives BBC3, BBC4, ITV2+1, ITV3+1, ITV4, ITV4+1, ITV Encore, ITV Encore +1, ITV Be, ITV Be +1, E4, E4+1, More 4, More 4+1, 4/7, Film 4, Film 4+1, 4Music, 5*, 5*+1, 5USA, 5USA+1 and Channel 5+24 as well as the plethora of other mainly entertainment channels available to UK audiences, including those owned by Sky, UKTV and CBS/AMC Networks, and we further disregard the little-watched news channels, including Sky News and the BBC's news and parliamentary channels, focusing instead on the main – and most-watched – services listed in table 4, we can see that the public service broadcasters of the public sector are the clear brand leaders (BARB 2014). Combining the weekly audience shares of BBC1, BBC2 and Channel 4 produces a share of 31,7%, while that of ITV, ITV2, ITV3 and Channel 5 of only 20,2%. Admittedly, all the channels in table 4 are situated among the first ten slots on the Freeview EPG, giving them greater prominence than most other channels, but the UK population does seem to display a clear preference for the main brands operated by the public sector broadcasters over those of the commercial sector – just as in radio.

Table 5. Television platform use, 2013

| Platform use (at home) | UK adults (82%) |
|--|-----------------|
| Freeview (digital terrestrial broadcast) | 37% |
| Satellite (subscription and/or FTA) | 31% |
| Cable | 14% |

Source: Ofcom

3. Conclusion: a healthy public sector providing extensive public service broadcasting

The current popularity of both radio and television services in the UK which are run on a not-for-profit basis, be they operated by the BBC or to a much lesser extent by the state-owned Channel 4, attests to the strength of public service broadcasting in the UK. Largely, as we have seen, the strengths of the BBC and the influence of the public service ethos even in the way mainstream private-sector broadcasting, especially television, is regulated can be attributed to the importance placed upon public service media right from the beginning. This public sector ethos has, however, almost inevitably been weakened since the 1920s, as increasingly strident voices have lobbied for greater opportunities for the private sector to generate as much profit as possible from broadcasting have gained greater traction at certain critical points in the history of broadcasting. We can summarise the current situation thus: the BBC is state-owned and licence-fee funded with a need to justify its privileged funding by distinguishing itself from the commercial sector by emphasising its public service credentials; Channel Four is state-owned and advertising-funded but with a public service requirement upon its main channel that it takes seriously while often attempting to innovate and broadcast challenging programming; and there are licensing and regulatory requirements which continue to impose public service obligations on the privately-owned commercial channels, ITV and Channel 5, although commercial radio has largely been allowed to abandon such responsibilities.

Nonetheless, public service broadcasting does face some uncertainty in the UK as the BBC has already begun to respond to the challenges of the charter renewal process which occurs every ten years. Each renewal tends now to be preceded by a protracted period of public debate in which various stakeholders, from politicians to the BBC itself, to the corporation's more predatory competitors, dispute the desirability of maintaining the BBC's privileged status and its unique funding mechanism, the licence fee. Options always include restricting its size and the scope of its activities if its status is deemed anti-competitive, leaving it as it is, selling off the commercially-viable parts of its operation, such as Radio 2, to the highest bidder who promises to maintain at least a diluted public service element to the service, or changing the funding mechanism. The latter option has become more pertinent now that online viewing has replaced some viewing through television receivers, and fewer households needing to pay the receiving licence fees could significantly reduce the corporation's income. In 2014 a government-backed proposal to decriminalise non-payment and reduce licence evasion to a civil matter only failed because it was narrowly defeated in the second legislative chamber, the House of Lords (BBC 2015), and some particularly strident voices in the public debate will almost certainly be lobbying for the BBC to become an optional subscription-based service. That would be very damaging for the BBC and the probable loss of income of such an outcome would almost certainly entail drastic cuts to its operation.

The corporation faces this latest charter renewal period having suffered a number of recent reputational setbacks, including a long-running scandal over historical sex abuse allegations involving former presenters, criticisms of its internal regulator, the BBC Trust, over its ability to hold the BBC Executive Board to account and some instances of financial mismanagement. One positive note: the last renewal left the BBC broadly unscathed, despite its coming in the aftermath of the biggest ever dispute between the corporation and a serving government – one culminating with the resignations of both its Chairman and its Director-General (Starkey 2006: 6–7). It will be interesting to see to what extent this until now robust bastion of public service values and public service broadcasting will survive in its present form.

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