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## Radio in Europe

*Der Direktor des Forschungsdienstes von BBC World Service äussert sich zur Radio Szene in Europa. Eine Prämisse seiner Ausführungen besteht darin, dass er davon ausgeht, dass die Zukunft des Radios nicht nur durch Profitmotive bestimmt sein wird, sondern dass das Radiomachen auch aus einer öffentlichen Verpflichtung heraus erfolgen sollte.*

It was about six months ago that I was invited to speak on radio in Europe at this seminar. I saw from the literature that you were using the occasion to assess the wider European media scene and the future place of the Swiss media within that, especially if Switzerland moves towards greater integration in Europe.

But as I began to think about today I soon realised I had to make some choices. Like a radio producer making a feature or documentary, I had to decide what I was going to cover. What sources would I look to? What aspects of radio in Europe would I emphasise and what would I play down or leave out altogether? In the language of public relations and propaganda, what "spin" would I be giving the subject?

It's no good expecting me to give an impartial and value-free account. Nor can I cover everything in the few minutes given to me. And in the very selection of what I do talk about, my own bias may become apparent.

Let me read something to you that might illustrate what I mean. I found the following in a recent book on radio in Europe:

Rapid progress toward more effective commercial radio is sweeping Europe. . . All markets follow the same pattern: a reduction in prohibitory regulation increasing opportunities for profitable private investment.

. . . As the obstacles to free radio are removed, the medium will be well-placed to benefit from wholesale deregulation and democratisation throughout the continent. . . .

Radio's position can only be strengthened by these changes. The removal of trade barriers and increase in cross-border cooperation and competition accompanying the move toward closer European unity will step up marketing activity to the profit of all media.

This is a short extract from the introduction to "*The 1992 Kagan Book of European Radio*", published just a few weeks ago. The writer or writers see promising opportunities for smart commercial operators who are ahead of the field in seeking out new market possibilities throughout Europe, East and West.

The book gives a lot of information about radio throughout the continent - how much is spent on

advertising on the radio, how many commercial stations there are, how much time people spend listening on an average day, how much listening there is to these so called "free radios" compared to others, what the audience trends are and so on. But especially notice the language used here. "*Progress toward more effective commercial radio*", "*obstacles to free radio are removed*", and the linking of those two words "*democratisation*" and "*deregulation*". Both are seen as a good thing and no one could possibly be against such obvious progress as deregulation unless they had sinister motives.

This book is written from an *American perspective* by people who see radio as simply a product to be marketed like any other. And that is the direction in which much European radio has moved and is moving. I could spend the next few minutes in similar vein. But I am not going to because I believe the *future of radio in Europe* is not purely or even principally to be seen in commercial terms. And I don't think you would all be here if your interest in media in Europe were solely or even chiefly motivated by profit. I proceed on the basis of assuming that we share an interest in radio as a means of communication with some intention to serve audience needs. I assume also that the whole process of radio broadcasting has, or should have, something to do with *public good*. That can, of course, include much of commercially funded radio. The distinction is not about means of finance but is about the basic motivation or *raison d'être*.

My job is mostly about radio. It is the responsibility of my department to find out as much relevant information as possible about radio listening in all parts of the world. We carry out *different kinds of research* designed to find out who listens to the BBC World Service. Where audiences are large, we can discover why this is so. We learn a good deal about the motivations and tastes of those people who choose to listen to the various services that the BBC provides. Where audiences are small, we can find out why, and whether anything can be done to change our services in order *to attract new listeners*. The fact that the BBC is the most successful international radio station has, I believe, a lot to do with the fact that for most of its sixty year history the BBC World Service has spent money on audience research. The listener matters; it is to serve the public - that is the audience - in Britain as well as around the world, that the BBC exists.

Historically, and today, most of the *BBC audience* hears the World Service on shortwave. But our research does

not concentrate solely on this. In the process of carrying out our research we find out a lot about radio listening in general. And in all parts of the world we have plotted the changes that have characterised radio so much over the past decade. I have been asked to talk about Europe but it is worth noting that many of the changes we see in Europe are happening elsewhere as well. We are seeing the beginnings of deregulation of radio in Africa and South Asia, until now almost entirely areas of state monopoly.

Monopolies, as we have known them in Europe, have ended, or they are coming to an end. Very large and mainly undifferentiated audiences have broken down. *General interest radio services* have given way to *networks with different styles and targets*. This development which began many years ago has now been refined further and station financiers expect services to be tailored to meet the demands of specific market niches, especially of course those with spending power. We see the development of a consumer based market approach to audiences. Radio managers have had to learn market research. Positioning and planning become essential to meet the challenges of the new environments.

Twenty years ago, even ten years ago one could have described the European radio scene relatively simply. All countries had national public service radio, mostly funding from licence fees. Most also had some regional radio. Some had just started, or were developing, local radio, mostly public service. Now one of the few *generalisations* one can still make is that in all European countries one sees *various stages of transition* from what I have just described to something else. But what something else? Will we see other countries with thousands of *local radio stations* like Italy or Spain? Some countries have gone in a similar direction - Portugal, Greece and Belgium for example. But in each country very different systems are emerging. And in Italy where deregulation reached its apogee, there is now a kind of reregulation.

There are still some countries where little has changed, yet. But who would have believed us if we had said ten years ago that in the whole of Europe, from the Urals to Iceland, from Norway to Malta there would be only one country left in mainland Europe in 1992 still with a *public service monopoly* and that the country in question would be Austria? Even Albania and Romania have ended their state monopoly of broadcasting. But there is a great difference between allowing a wholly free market, as Italy has, and permitting the entry of private operators in a limited way designed to preserve and sustain the best of the public service tradition, as I believe to be the case in Britain, Germany, Switzerland, Denmark and others.

The European radio scene differs in other ways too. If we look at audiences, we find that Italians and Belgians listen to far more radio than do the British or Spanish. The *amount of money available from advertising* for radio differs greatly from country to country. Austria, for all its attachment to a public service monopoly, is heavily reliant on advertising money to fund radio, the second highest per capita rate in Europe after Spain. 12% of all adverti-

sing money goes on radio compared to only 2% in Britain and Switzerland. Will these figures change as the broadcasting ecology changes? The survival of effective, profitable, commercial radio looks rather uncertain in some countries because of the low levels of advertising money available.

Some things have remained and look as if they will survive the commercial challenge. All countries in Europe, with one interesting exception, have retained nationally based public service radio broadcasting. All, with the exception of Germany, have between two and five national networks. Germany is about to have its first national radio network. But public service radio broadcasting has changed. It has become more popularised, services have segmented themselves more. And only in Greece and Italy have public broadcasters not developed local or regional services. In most countries, public broadcasters have met the challenge of commercialisation by *offering new services*, especially in popular music and in local services.

I had better define here what I see as the *public service tradition*. It requires *universality* of service, both geographical and social services *have to be available for all* and *aimed at serving audiences* irrespective of income or spending power. There should be no vested interests and public service broadcasting should compete for quality more than numbers of people being reached at any particular time.

The problem in radio, perhaps even more than in television, has been *to ensure public funding* for activities which many say could be funded commercially. But there is then the acute dilemma of the direction in which to go. For if public radio services decide to occupy the high ground of culture, news and documentary, leaving popular entertainment to the commercial operators, how can they continue to justify using licence payers money from everyone to pay for something that many people hardly ever or never use?

The debate you are having here today is being replicated all over Europe in different forms and with different outcomes. Everywhere the new broadcasting environment is being shaped by both *politics and business*. The pressures for survival are intense and difficult for everyone. The room for manoeuvre is small. There is not a lot of room for imagination and invention in an environment where money is very tight and where there are commercial operators eager to take risks and to gain audience share. Quality programmes costing large amounts of money are likely to be increasingly squeezed out if public service broadcasters put as their highest priority the need to reach and retain maximum audience share. The growth in the number of choices that European listeners now, or will soon have, will inevitably force down the numbers of listeners that most of them can hope to reach. And public broadcasters have to resign themselves to a fall in their share. This has already happened in the Netherlands, Finland and France, and is beginning to happen in Britain and the Nordic countries.

I pointed out earlier that commercial radio has a rather uncertain future in some countries because too many stations are chasing a relatively small amount of advertising revenue available. The overall sums spent on radio may well increase, but it seems to be agreed that commercial stations will have to have frugal policies on programme expenditure if they are to be profitable. That means programme costs will always be judged in terms of numbers of listeners (of the right commercial profile) delivered for advertising purposes, for every pound, franc or mark spent on programmes. Quality is not very likely to survive for long in such circumstances. Tony Hall, the BBC Director of News and Current Affairs, pointed this out last month when he said that the BBC will stand increasingly alone as a provider of quality news reporting and analysis as commercial pressures pull the values of news broadcasting apart. The same could be said, in Britain and elsewhere, about documentary, drama, live music and a lot more.

Radio has distinctive and important strengths which make it a powerful medium, even in the age of satellite television. Its flexibility and portability, for example, make it a medium that will always have a role. You can't (or you shouldn't) watch TV in the car, but you can listen to the radio. I have the radio on while writing this. You can listen to radio while doing many things. It can be a friendly background sound when you are engaged in some activity requiring thought. Many young people in Britain, listen to the radio while studying. Most people in Europe still prefer the radio to television in the morning to catch up with the news.

Radio has speed and immediacy which still enables it to be ahead of television, even with the new technology of portable cameras and satellite news links. During the Gulf War, radio was more important than television in most countries for war news. Audience research in Europe and in the Gulf area showed an increase in the amount of radio listening. People watched more television as well, but radio gained more than television. How should radio broadcasters respond to these facts. In Britain, the BBC now proposes, partly on the strength of what happened during the Gulf War, to start a 24 hour news service taking away Radio Four's present longwave frequency for the purpose. The public response has been disturbing for the planners but it is an illustration of the fact that no one should doubt the public's affection for and commitment to radio. Radio Four would be left on FM. But you know the problem of FM very well here in Switzerland. Multi-path distortion, especially when driving in a car, make it unreliable and patchy and you have to keep retuning unless you have an expensive RDS set. A school teacher in Winchester started a national campaign to save Radio Four on longwave. The reaction was amazing. A march of angry listeners was planned and it looked as if we would see the first such demonstration of public attachment to the status quo. The march was called off only when the BBC Governors promised that the all news network would not start until a better service was provided nationally for Radio Four on FM. The campaign won't

end there for it is very unlikely that FM services can be sufficiently improved to cover the country adequately. There are simply not enough frequencies left, now that so much of the spectrum is allocated to commercial operators. This problem won't go away until we have Digital Audio Broadcasting and that is still some years in the future.

Radio is also used for much more than news and background music. These are the programme genres which attract the biggest numbers of listeners, but I want to warn about what I believe to be the misuse of audience figures. They are not the whole story; everybody knows that. But I believe they are still given far too great an importance. Or rather, they are assigned a meaning that they should not have. Consider the following example. If we look at the ratings for some "highbrow" cultural networks we usually see quite low figures, sometimes too low to be reliable. Hungry commercial radio predators may say "There is no audience. Give up the frequency to someone who can attract more listeners." Sometimes the predators will be inside the public service radio itself. "Stop wasting resources on minorities." It is even alleged to be unfair and even not a public service since public money is being used to fund programmes for a minority, often an educated elite.

There is no doubt that replacing a minority interest cultural channel playing drama, documentaries, programmes of poetry or other minority interest subjects, by a network offering more popular fare (and at much lower cost) will attract a larger audience. And planners will be impressed by a far better performance in terms of numbers of listeners reached per franc, mark or pound.

The inexorable logic of this would be to remove most radio programmes of serious quality from Europe's airwaves and to bring to an end most networks designed to bring unusual, challenging, demanding and innovative radio to the public. It could also threaten the survival of programmes for all minorities however such minorities are defined. And worst of all, we audience researchers would get the blame!

Audience research has rightly been used in public service radio as part of the system of public accountability. Commercial broadcasters use it principally to assist in their market strategies and of course to help them sell advertising time. For public service broadcasters also it helps better planning of programmes and schedules. But it is the most important way there is to demonstrate that public money and resources are being used wisely, efficiently and effectively. The problem is that in this respect we look mainly, if not solely, at *audience size*, as if this was all that mattered. Radio managers in Europe are far too preoccupied with audience figures. It is easy to understand why. They are under pressure to justify themselves and what they do. And audience figures are virtually all they have with which to measure their own performance. The problem is that this "currency", with which decisions about programmes, network schedules and budgets are made, tells only a part of the story. We urgently need

something else to add to audience figures which tell us something about *quality* - the quality of listening that we are measuring.

A few weeks ago a concert of Portuguese music was broadcast live from a cathedral in Lisbon. The concert was part of the city's celebration of the 500th anniversary of Columbus' arrival in America. The music was quite new to me and I imagine to most of those listening. It was a memorable concert, vivid, exciting and new. I listened. I did nothing else. That was my personal reaction. I don't know what the audience figures around Europe were. They will probably have been very small. But it seems a great pity if all we audience researchers can say to the Portuguese musicians and the production team "You had an audience of less than 0.1%. Too small to measure accurately. Sorry." The actual number of listeners reached matters far less than what they made of the programme. Were there many like me who found the experience to have been immensely worthwhile? It is time we paid far

more attention to measuring the quality of listening so that we can show what the real value of programmes are to those who receive them. This is the great challenge of the nineties for my part of the radio business.

It is part of a wider challenge to all those who want to see the survival of quality in radio. Radio in Europe is moving towards a new landscape and it is still very difficult to be sure what it is all going to look like. Will we look back on the past, and present, as a golden age of radio? Are we moving in to an era in which quality has been replaced by services and programmes devised by market researchers and media planners? It could happen if everything is left to market forces.

Radio will continue to serve special needs, continue to challenge and be innovative and do things that the market left to itself will never do only if people with creativity and vision continue to work in the business. Someone said once *"Please don't give us what we want. We deserve better than that."*