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Live and local no more? Listening communities and globalising trends in the ownership and production of local radio

GUY STARKEY [1]
University of Sunderland
guy.starkey@sunderland.ac.uk

Abstract:
This paper considers the trend in the United Kingdom and elsewhere in the world for locally-owned, locally-originated and locally-accountable commercial radio stations to fall into the hands of national and even international media groups that disadvantage the communities from which they seek to profit, by removing from them a means of cultural expression. In essence, localness in local radio is an endangered species, even though it is a relatively recent phenomenon. Lighter-touch regulation also means increasing automation, so live presentation is under threat, too.
By tracing the early development of local radio through ideologically-charged debates around public-service broadcasting and the fitness of the private sector to exploit scarce resources, to present-day digital environments in which traditional rationales for regulation on ownership and content have become increasingly challenged, the paper also speculates on future developments in local radio. The paper situates developments in the radio industry within wider contexts in the rapidly-evolving, post-McLuhan mediatised world of the twenty-first century.
It draws on research carried out between July 2009 and January 2011for the new book, *Local Radio, Going Global*, published in December 2011 by Palgrave Macmillan.

Keywords: radio, local, public service broadcasting, community radio

Introduction: distinctiveness and homogenisation

This paper is mainly concerned with the rise and fall of localness in local radio in a single country, the United Kingdom. However this is a phenomenon which can be traced through the histories of the radio industries of many countries in Europe and elsewhere. It has its origins in the 1920s, yet the greatest *declines* in localness have occurred since the mid 1990s, following progressive relaxation of state regulation. Because regulation is often relied upon to provide a bulwark against the excesses of capitalism, without it radio – and in particular *commercial* radio – has often fallen victim to globalising tendencies in the wider political economy. Another of the most decisive catalysts for declining localness in recent years has been technological advance, but evolving societies and trends in popular culture have also played a part. Technological advance, especially the digitisation of media production and distribution, has brought new opportunities and challenges to a range of mass media. Whatever may have created the conditions which encourage globalisation, some commentators suggest it has the potential to erode what distinctiveness remains between communities, regions and even whole countries, to diminish cultural identity, heritage and development, and ultimately to threaten the economic and political

[1] Professor of Radio and Journalism; Centre for Research in Media and Cultural Studies, England

autonomy of minorities, large and small. In 1964 the Canadian scholar Marshall McLuhan suggested that the shrinking 'global village' of an increasingly mediatised world, was not a homogenising influence on societies (2001: 334). However, since 1964, that world has become increasingly mediatised and with the recent exponential quickening of the pace of change which we have already identified, the threat of globalisation has grown. The rise and fall of localness in local radio may not be solely responsible for the realisation of such apocalyptic predictions, but it may contribute to such a scenario because one of the great strengths of local media content is that it can – and often still does - express and support cultural, socio-political and economic distinctiveness.

Many of those who claim local ownership of media institutions to be virtuous argue the following to be significant: the organisation is owned and controlled by stakeholders in the community who are more sympathetic to the concerns of the community, (even though in practice these owners may just be a privileged few); they are more likely to be inclined to resist external influences on local distinctiveness; they may also tend to resist the exclusion of local distinctiveness from the output and they might be better equipped to resist homogenising, perhaps globalising influences emanating from other cultures and centres of economic influence. Locally-produced content, it is argued, can enable local citizens to access producers directly, so that content can better reflect local distinctiveness and cultural diversity, promote audience involvement in local discourse and thereby stimulate local participation and democracy. Conversely, there are a range of pejorative claims that can be made about localness: that local ownership may bestow upon a privileged minority excessive influence over the community and the opportunity to promote perspectives and assumptions that run so absurdly counter to those of the wider contexts within which the community is situated that they reflect only values and attitudes that are extremely parochial in nature. A prevalence of parochial content and contributors, they might argue, can lead to the exclusion of more mainstream (that is, international, national or regional) content and contributors, while lower production values might be the result of smaller budgets and the lack of economies of scale. Low standards of 'professionalism' might anyway lead to low audience penetration because there are many more attractively produced national and regional alternatives on offer in the increasingly crowded media marketplace.

Before we consider some specifics around localness in radio, let us first consider some similarities between radio and other media upon which audiences have grown to rely in order to access local content, produced locally. Table 1 shows through Newspaper Society data from July 2011 that in the UK, local and regional press ownership, in many cases of titles which developed as independent, locally-owned newspapers in local communities which they reflected in their content, resides mainly with the four largest companies. Between them, Trinity Mirror, Johnston Press, Newsquest Media Group, and Northcliffe Media own 719 out of the 1,167 titles published in the UK and enjoy a combined weekly circulation of 29,660,908. Including a further sixteen publishers in a 'top twenty' excludes only 153 titles owned by a small number of relatively small 'independents'. This decline in local ownership of newspaper titles has resulted in increasingly homogenised approaches to producing the content within each group, to the imposition of standard practices across titles within groups and the loss of distinctiveness in style and content in many titles. Meanwhile the economics of television, with the high cost of original programming, have hampered the growth of any thriving local television sector while most recently threatening to curtail what regional production of news and programming remains in the commercial sector, where ITV has been allowed to progressively dilute its public-service commitments in the face of increased competition from purely national channels.

Rank by weekly circulation		Number of titles	Weekly circulation
1	Trinity Mirror plc	168	10,889,071
2	Johnston Press	253	7,046,685
3	Newsquest Media Group	183	6,399,077
4	Northcliffe Media Ltd	115	5,326,075
5	Associated Newspapers Ltd	1	3,628,870
6	Evening Standard Ltd	1	3,009,800
7	Archant	69	1,812,760
8	D.C. Thomson & Co Ltd	6	1,612,089
9	The Midland News Association Ltd	17	1,608,258
10	Tindle Newspapers Ltd	74	1,133,678
11	Iliffe News & Media	40	1,018,954
12	Independent News & Media	6	507,559
13	NWN Media Ltd	14	446,843
14	CN Group Ltd	10	371,229
15	Bullivant Media Ltd	9	369,717
16	Kent Messenger Ltd	18	355,937
17	Irish News Ltd	1	265,332
18	Dunfermline Press Group	14	224,214
19	Clyde & Forth Press Ltd	14	214,671
20	Topper Newspapers Ltd	1	212,793
	Total Top 20 publishers	1,014	46,453,612
	Total other publishers	153	1,529,774
	Total all publishers (87)	1,167	47,983,386

Table 1: UK local and regional press ownership, July 2011. Source: Newspaper Society

The rise of local radio

In the UK commercial radio sector, a trend for locally-owned, locally-originated and locally-accountable commercial radio stations to be acquired by national and even international media groups gathered pace from the mid-1990s. The prospects for local radio in the public sector are suddenly deteriorating as the BBC searches through an initiative called Delivering Quality first, for ways to reduce its costs in order to accommodate a 16 per cent cut in its funding, imposed by a coalition government anxious to reduce state borrowing (Plunkett 2010). It will probably achieve some of the savings required by imposing on its local radio network large-scale programme sharing by groups of stations or all of them in a part-time quasi-national network. However, the outlook for local radio has not always looked so gloomy. At the point of its incorporation, in 1927 the British Broadcasting Corporation (BBC) was a state-owned body benefiting from a compulsory licence fee imposed on every household which used a broadcast receiver to listen to its broadcasts. In return, the BBC was required to provide for its public broadcasting of a quality which private companies were considered unlikely to offer. Thus was born the notion of public service broadcasting, one that was quite different to the American model, which mainly left broadcasting to a growing private sector. There would be neither a licence fee nor a monopoly for any single broadcaster in the US, because radio was to be the preserve of multiple private companies or individuals intending to make a profit out of advertising. This relative anarchy, as it may have appeared to the British, was both organised and regulated, (by a number of different bodies, and from 1934 this has been the remit of the Federal Communications Commission or FCC).

This established much more than two dissimilar radio industries: an ideological divide between bullish free-marketeers in the US and the advocates in the UK of a form of public service broadcasting that would be able to provide not only what listeners wanted, but also what was considered good for them. The British PSB model was adopted in various permutations in a number of European countries who were also clearly ideologically opposed to the notion that unfettered capitalism should be relied upon to run radio (Starkey 2007: 23). In the United Kingdom early radio developed on a local, or at least regional, basis. In 1920 the Marconi Company had begun intermittent broadcasts using the call-sign 2MT to small numbers of early radio listeners, using a low-powered transmitter in the county of Essex. A formal licence followed, to regularly broadcast a service to London with the call-sign 2LO. The next locations to benefit from regional radio stations were Birmingham, Manchester, Newcastle, Cardiff, Glasgow, Aberdeen, Bournemouth, Sheffield, Plymouth and Belfast, each station using its own call-sign with which to identify itself on air. Additional relays of neighbouring services were rolled out in Edinburgh, Liverpool, Leeds and Bradford, Hull, Nottingham, Dundee, Stoke-on-Trent and Swansea (McCarthy 2007: 1-9), each one demonstrating how a community, even if rather large by today's standards, might appear to benefit from a radio service of its own or simply through the extension of another station beyond its original editorial area.

In considering how, forty years later, the offshore pirates which began broadcasting from international waters off the coast successfully challenged the BBC's monopoly of daytime radio, most commentators concentrate on the introduction of Radio 1 in 1967 as a national service of pop music aimed at young people, to complement three other national radio services which were rebranded at the same time as Radios 2, 3 and 4 (Fleming 2002: 32; Wilby & Conroy 1994: 19). However, a cause-and-effect relationship also exists between the arrival of the pirates and the birth of local radio in the UK (Crisell 1994: 33). The first 'experimental' BBC local radio station, Radio Leicester, was launched on 8th November 1967. Initially there would be only a trial involving eight stations, but by the end of 1973 there were twenty on air and the number rose to forty during the 1990s. With the offshore pirates now outlawed, most had disappeared, so it was to be the state provider that would enjoy a monopoly of local radio provision. Choice was to be between services, but not between providers, with the minor exception of Radio Luxembourg, originally one of a wave of continental radio stations deliberately challenging the BBC's monopoly in the 1930s by broadcasting from the European continent. Luxembourg, though, due to the characteristics of the ionosphere upon which long-distance radio transmissions depend in order to reach audiences over the horizon, was only audible in most of the UK in an evening 'ghetto' after darkness had fallen. However, the 1970 general election campaign was a clash of broadcasting ideologies: the victorious Conservative Party promised to establish a sixty-station network of 'local private enterprise radio', extending local broadcasting to many more what their manifesto described as 'local communities' (1970). Earlier, it had been fears of anarchy on the airwaves and a cacophonous overcrowding of the scarce resource of electro-magnetic spectrum allocated by international agreement to broadcasting that had favoured the granting of a monopoly to the BBC. Such chaos on the newly-liberated broadcasting landscape was to be avoided however through strict – some would say, heavy handed - content and ownership regulation. This would be assured by a regulator for the new commercial radio sector and the already well-established commercial television service, ITV: the Independent Broadcasting Authority (IBA). Fixed-term franchises were awarded through what was soon dubbed a 'beauty contest' selection process, through which the IBA determined which of those private companies which applied to run commercial radio in an area would provide the best service for the local community.

Firstly, the IBA would identify an area with the potential to sustain through advertising income an Independent Local Radio (ILR) service. Then it would publicly advertise the franchise with a deadline for applications to be submitted, and choose which applicant deserved to be successful. Several criteria were applied by the IBA in making the selection, but alongside credibility of governance and financial robustness – in order to ensure that incomes covered outgoings and generated at least a modest profit - were most certainly local ownership and local content production. Unlike BBC local radio, which relied from its inception upon regular relays of programming from the BBC's national networks in order to stretch meagre budgets to cover the entire broadcast day, the content broadcast by ILR was all to be locally originated in order to best serve the local interests of the communities which they were intended to cover. The journalist Mike Baron, commenting on the delicate balance victorious applicants for ILR franchises had to strike between meeting the programming commitments they had made in their applications and breaking even financially, warned that if some smaller stations were to be overwhelmed by losses, such failures 'would have serious repercussions for the entire network' (1975: 163). The public service obligations imposed on the stations by their own initial promises and the heavy hand of regulation by the IBA made more precarious that balance between advertising income and necessary expenditure - not least because locally producing 'quality' speech is measurably more resource-intensive than simply playing music off records.

Choosing the first of the ILR franchisees and getting the first nineteen of them on air presented many challenges, partly because radio had for so long been widely considered to be the preserve of the BBC. There was no ready-made radio advertising market and some successful franchisees found raising the capital they needed to begin broadcasting unexpectedly problematic. The first two to launch were in London in 1973. LBC was to be an all-speech station and Capital for 'general entertainment'. The network's growth was unexpectedly stalled at nineteen stations because ILR almost immediately suffered from another change of government in 1974 and an ideological repositioning of official attitudes to radio, as Labour returned to power and forbade any further expansion of the network (Baron 1975: 160-6). As the growth of the network stalled, it failed to gain a critical mass which might have made it more robust financially. Consequently, there was less national advertising than at first envisaged and so few stations made a profit in their first years of trading. This was because - in the midst of a difficult economic climate - unlike in the United States, France and many other countries where commercial radio had emerged and begun to thrive earlier in the century, radio was simply not on the agenda of the media buyers with the largest advertising budgets at their disposal. As far as these mainly London-based marketing executives were concerned, radio was a medium they did not readily associate with advertising, and diverting their budgets to the medium was contrary to established practice - despite the brief appearance of the offshore pirate stations of the 1960s and the continuing presence of Radio Luxembourg, now firmly pitched at an evening teenage demographic. They found it challenging to include in their plans a handful of small stations that could provide only patchy coverage of the provinces, most of which could not be heard in London and which operated using unfamiliar branding. By restricting the network to the first nineteen stations - fewer than one third of the number originally envisaged - ILR was prevented from being able to deliver to national advertisers a national audience. One of the consequences of all this was that, until the 1990s the share of the total UK advertising market that found its way to radio barely reached even a meagre two per cent. In its first year of trading, 1974-5, the fourth station on air, Greater Manchester Independent Radio (branded as Piccadilly Radio 261), made a modest first-year profit. Unfortunately, many other stations could not break even. LBC was obliged to bear the additional expense of running a national and international news service for an incomplete network that was unable to pay its way. This was a network which - even without the moratorium on expansion - would have taken years to grow large enough to provide the service, Independent Radio News (IRN), with sufficient income to cover its costs. Each subscribing station in the network was obliged to pay LBC £20 per thousand listeners for the IRN service, which - in order to be both credible and practical – was operating on the twenty-four hour, seven day per week basis that some stations needed, and which was, after all, one of the essential elements of a network with clear public-service obligations.

Naturally, it was the public-service obligations that would most concern both applicants for ILR franchises and the officers of the IBA who had to choose between them. In particular, speech, including news and current affairs, had the highest profile even on the vast majority of stations which - inevitably - relied upon mixing it with large amounts of music programming so that audiences would tune in in large enough numbers for the service to be viable. Most stations winning franchises also promised to complement their more mainstream daytime schedules with a range of specialist music programmes in the evening. Some even offered programmes featuring the arts in general or some aspect of the arts, such as books or theatre. Several stations had committed themselves to weekly news or current affairs round-ups, drawing on the output of their newsroom over the past seven days. Similarly, some programmed a sports review of the week on a Friday or at the weekend. The public service commitment which evolved in an unsystematic way through the beauty contest system, together with the diverse ownership base of the first stations in the ILR network, produced distinctiveness in approach and style that reflected at least in part the diversity of the different local areas being served. The first station to open in Wales, Swansea Sound, had committed itself to broadcasting for at least part of the day in Welsh, so eight minutes of Welsh were broadcast at 06:00 from Monday to Saturday, in addition to thirty minutes on Sundays and ninety minutes every evening. Daily Welsh lessons were broadcast for non-Welsh speakers. Among some of the most original programming on the network, Liverpool's Radio City produced original comedy written by Alan Bleasdale and John Gorman. Each week a feedback programme featured listeners' letters, presented by the Programme Controller, Gillian Reynolds. Some stations broadcast what was then becoming known as 'access' programming, giving a voice to individuals or groups with common interests who were enabled to create their own original programming, with suitable levels of support and supervision from the professional broadcasters. Children also featured in the programme schedules of many stations, not just because they had been considered to be a beauty-contest winner, but also because the BBC national and local stations already included children's programming alongside more adult material. Unlike the narrow targeting of today, early ILR seemed to promise at least something for everyone in the local area. Systematic analysis of the programme schedules of the era reveals a range of programming elements that were common across many stations, and many other instances in which individual stations would innovate, bringing their own local identities to bear on their output (Starkey 2011: 49-54, 63-76).

Relaxation of regulation – and hello to homogenisation

When in the 1979 general election the Conservatives regained power, work began on completing the network. The consensus politics of the post-war era was over, and the country became more polarised. With the rise of the political right as the Thatcher era dawned came a decade of rapid expansion and de-regulation in commercial radio. In total, fifty ILR broadcast licences had been awarded by 1984 and the stations were either already on-air or about to launch. Otherwise, for commercial radio the mid-1980s was a period of 'relative stability', a number of stations being financially successful, despite their obligation to meet previous promises to provide public service broadcasting for their local communities (Stoller 2010: 124-5). Stoller's detailed history of Independent Radio, Sounds of your Life, pinpoints one regular meeting of the Association of Independent Radio Contractors (AIRC) on 23 June 1984, held at the Heathrow Sheraton Skyline Hotel, as crucial in the way the sector began to take advantage of the changed political environment and metamorphose from its beginnings as ILR to a quite different model: the commercial radio industry we know today (2010: 144-53). At this conference of chairmen and managing directors of the existing ILR companies, a new militancy developed out of expressions of unease and this single event proved to be an important catalyst for change. Key concerns included renewed talk in government of proposed legislation to free the commercial radio sector of the constraints of local broadcasting and establish a service of Independent National Radio (INR). This showed how different from those of the 1970s the expectations of the establishment had now become, as the old left-right consensus around restricting the potential excesses of privately-owned and operated commercial radio in the UK evaporated. Many of the ILR stations were fearful that any credible 'INR' might bring increased competition for what little national radio advertising existed and damage what was for them a modest but still important income stream. There had also been talk suggesting that now revenues and profitability in ILR were finally improving, a levy on the ILR stations' hard-earned income might be used to finance the launch of any new competitors in the form of INR. The richest ILR stations were already subject to a levy – or 'secondary rental' – which was used to support the less successful local stations in the network in meeting their PSB commitments, and the levy was paid to the IBA once they had reached certain levels of profitability. The IBA was required to redistribute this money 'in the interests of the system as a whole' (Stoller 2010: 38). Another cause for disgruntlement among some ILR station owners was a renewed challenge to the duopoly from a number of offshore pirates which had either continued to broadcast in contravention of the Marine Offences Act 1967, such as Radio Caroline, or recently appeared, such as Laser 558, Radio Northsea International and Radio Atlantis - the former proving particularly successful at attracting audiences in the south-east of England.

Following, but not entirely because of the Heathrow Conference, in 1990 the IBA was replaced by a new regulator for UK commercial radio: the Radio Authority. With this change of regulator came an increasingly 'lighter touch' regulation of content and ownership. An increasingly permissive attitude in government, combined with an empathy for private enterprise struggling under what was now being depicted by the political right as burdensome 'red tape', was reinforced by the first actual closure of an ILR station, Centre Radio in Leicester. Ironically, this had been the birthplace of BBC Local Radio, but it was the failure of Centre Radio that first heralded the death of localness in its commercial counterpart, because sacrificing localness in favour of financial stability seemed to the Conservative government like an appropriate response. While other stations had struggled to remain financially solvent, such as CBC in Cardiff and Radio Aire in Leeds, and while others were rescued from closure by new investors, Centre Radio was allowed to fail in 1983, after broadcasting for only two years. A new contractor, Leicester Sound, soon took over the franchise, but an actual failure did little to enhance the reputation of the IBA or promote ILR as a business model. The Conservatives wanted to expand the network, but many more business failures in the sector would inevitably have dismayed potential investors and threatened that future expansion. The rescue of Centre Radio happened relatively quickly because the neighbouring station in Nottingham, Radio Trent, became the majority shareholder of a new company, Leicester Sound, and the two stations were allowed by the IBA to share twelve hours per day of programming outside daytimes. They also achieved joint savings by sharing resources for accounting, administration and commercial production. According to Stoller, 'such almost covert takeovers began to be routine as the eighties progressed' (2010: 124). A clear precedent had been set and, because continued expansion of the network meant stations were opening in much less financially viable markets than the large metropolitan cities where much of the original network had begun, a gold rush by some cash-rich stations for mergers and acquisitions became unstoppable. Most significantly perhaps, early in 1985 Wiltshire Radio in Swindon took control of Radio West in the neighbouring city of Bristol. At Wiltshire Radio the journalist-turned-managing director, Ralph Bernard, developed a keen appetite for empire building, and this new strategy was stimulated by the passing of a new Broadcasting Act in 1996, which effected a comprehensive overhaul of the law on cross-media ownership (Kuhn 2007: 96). Wiltshire Radio became GWR and by March 2001 the company owned or controlled a total of forty seven stations, both nearby and even great distances away. GWR were not the only opportunists to use savings in operation and management costs to bring economies of scale to ever-growing radio 'groups' - exploiting to the full the relaxation of rules on cross-media ownership in the 1996 Act, which was, after all, intended to strengthen media companies financially and develop their ability to weather economic storms.

GWR may have had the highest profile, not least because a GWR takeover of a station resulted in an almost immediate 'makeover' of its on- and off-air branding, management and programming, which resulted in an abrupt loss of whatever distinctiveness had previously existed in a station. A number of other groups developed, though, with each one taking over whatever stations around the country became either willing or financially vulnerable to them. If the dominance of the sector by a company which began life as a small station based in rural Wiltshire was surprising, the growth of London's Capital Radio into an entirely separate group was less so. A multitude of acquisitions and mergers, takeovers and boardroom manoeuvres gathered pace over the 1990s and 2000s and Stoller (2010) records these in detail. We should note here that the frenzy into which this developed was deeply detrimental to the sense of localness in ownership and in content generation which had been a sine qua non of the introduction of ILR. Different groups had different attitudes to distinctiveness among stations in their portfolios, and not all stations losing their independence were developed into clones of a perceived successful template, applied without sensitivity to local interests or heritage factors, but in many instances stations became mere cogs in much larger operations which perceived progress to be the homogenisation of processes and output. What had once been locally-owned and managed radio stations, making locally all decisions about local content, became subject to decision making and management from far beyond the boundaries of their editorial areas. The Communications Act 2003 replaced the Radio Authority with a new regulator, Ofcom, and promised an even lighter approach to the regulation of content and ownership. This homogenisation of the output of local commercial radio in the UK has quickened in pace ever since. Of great significance to this trend has been the development of digital technology used in radio for content storage and playout. In turn, this technology has brought greater ease of automating programming so no human needs to be present in the studio, and syndicating programmes across several stations in a group at a time. Often the only concessions to localness are the incorporation of short bursts of bespoke local news and advertising within more generic programming that is being relayed to audiences in many different editorial areas. Another innovation in using technological advances to increase the profitability of individual stations, and so the groups which own them, is co-location, meaning two or more stations actually broadcasting from the same studio building, even if that building is outside the area to which one or more of those stations is licensed to broadcast.

Local radio, going global

A major problem with reporting on the ownership of individual stations by different groups lies in the ability for boardroom control to change overnight, as assets are not only traded because of the few remaining requirements of cross-media and competition regulation, but they can be sold or merely exchanged between current and emerging groups simply because the time seems right for such a move. This might be, for example, in order to cluster a portfolio of stations around a tighter-knit geographical area and thereby rationalise operations to cut group management costs. The data shown in table 2 cannot therefore be considered particularly durable, but do represent a snapshot of ownership in 2011. The table also serves to demonstrate the relationship between the major groups in the UK commercial radio sector and those with much less significant portfolios at the time of researching the book Local Radio, Going Global (Starkey 2011). Even the smallest groups are significant players in the local media landscape where they own or operate stations. As with many institutional studies, other factors can complicate matters. One apparently modest group, UKRD, either owned or controlled Eagle Radio and County Sound (Guildford), KL.FM (King's Lynn), Star Cambridge, and Pirate FM (Redruth), but also owned one third of Heart (South Hampshire) and a third of Nova (Weston-super-Mare). UKRD also owned sufficient shares in The Local Radio Company group (TLRC), and so it also effectively controlled Mix 96 (Aylesbury), Spire FM (Salisbury), Wessex FM (Dorchester), Spirit FM (Chichester), 2BR (Burnley), Minster FM (York), Stray FM (Harrogate), the two

Yorkshire Coast Radio licences in Scarborough and Bridlington, Sun FM (Sunderland), and a cluster of three stations in Darlington, Durham and Northallerton which all but merged in 2010 and now broadcast under one of the group's favourite brands: Star. Through TLRC, UKRD also controlled one third of The Bee (Blackburn).

Group	Number of commercial analogue radio licences held	National *broadcast* radio brands operated, analogue and digital
Global	47 FM (including Classic FM), 23 AM	The Arrow, Choice, Classic FM, Galaxy, Gold, Heart, LBC, XFM
Bauer	24 FM, 13 AM	Heat, The Hits, Kerrang, Kiss, Magic, Q Radio, Smash Hits
GMG	13 FM	Real, Smooth
UTV	11 FM, 4 AM (including TalkSport)	TalkSport
Absolute Radio	1 AM (Absolute Radio)	Absolute Radio, Absolute 80s, Absolute Radio 90s, Absolute Radio Classic Rock, Absolute Radio Extra
The Local Radio Company Group (UKRD controlled)	13 FM	
Lincs FM	9 FM	
UKRD	4 FM, 1 AM	
Sunrise Group	4 FM, 3 AM	Sunrise Radio, Kismat Radio, Punjabi Radio
Tindle Radio	9 FM	
Town & Country Broadcasting	7 FM	
Quidem	6 FM	
KMFM	7 FM	
Orion	5 FM, 3AM	
CN Group	3 FM	

Table 2: Station ownership and control by the principal UK commercial radio groups* in January 2011, shown by analogue licences held and national *broadcast* brands operated, (whether available through analogue or digital-only means). Source: Starkey (2011). * Excludes digital-only groups/stations, such as Planet Rock and UCB.

The central proposition in the new book Local Radio, Going Global (Starkey 2011) is that this concentration of ownership and control, together with the loss of distinctiveness in the nature of broadcast and, now, on-line content in what were once locally-owned and locally produced commercial radio services in the UK is symptomatic of the globalisation that is evident in many sociological, political, economic and cultural developments of our age and the past few decades. The diminution of localness on one 'local' radio station does not in itself bring about a centralised, 'globalised' world. It does, however, contribute to a process of globalisation that is manifestly observable around us. However, it is important to recognise that many of those stations which have lost their distinctiveness are located in such small or sparsely-populated areas that, as the original sixty-station ILR network was originally conceived at the time of the Conservative manifesto A Better Tomorrow (1970), would not even have been contemplated as areas that were potentially viable for local commercial radio. The difficulties in the 1970s in raising launch capital or remaining solvent through difficult economic periods, clearly precursored those that far smaller stations would experience even with the financial benefits brought by the digital technology of today. Similarly, UKRD and TLRC are both groups which won licences and launched stations in some of the smallest of areas to be advertised by the Radio Authority and, later, Ofcom. Sustaining those businesses under the terms of the original licence awards has often proven very difficult. Of course it is difficult to say whether this is due to their own failings or the economic hand dealt them, or simply a combination of the two, but they and some of the other groups have certainly faced financial hardship. Significantly, in 2006 UKRD handed back the licence for Stroud in Gloucestershire, which it had been attempting to operate as Star 107.9, to Ofcom, rather than sell it on, largely to force the regulator to respond (Day 2006). This moment in the history of UK commercial radio was just as important as the Heathrow Conference, because in handing back the licence, for the first time the licensing process and the role of the regulator as the final arbiter of who should be broadcast in an area had been decisively subverted by a commercial radio company. This was a pivotal moment in that since then Ofcom has attempted to accommodate proposed changes to licence agreements that represent wide-ranging, even swingeing U-turns in the interests of maintaining stations on air. Not all such concessions have been innovative; in the 1980s the co-location of entire services or parts of services had been allowed sparingly by the IBA, and already the practice of groups gathering together their local news operations into regional centres known as 'news hubs' had been considered by the Radio Authority shortly before it was subsumed within Ofcom in 2003. Pioneered by GWR, who had received the Authority's consent to open a hub experimentally in South-West England in 2002, the very first such initiative began servicing the separate GWR stations in Plymouth, Exeter/Torbay, Yeovil and Taunton, Kingsbridge and Barnstaple. At the hub, each of the different stations' own local news bulletins were pre-recorded by a single newsreader using copy and audio produced remotely at the hub itself or by reporters working across the combined coverage area who then fed the content they created to the centre. This 'pooling of resources', as it was rationalised, was allowed on the understanding that 'a local journalistic presence' would be maintained in each editorial area (Crisell & Starkey 1998: 20-21). In a document it published in 2004, Radio – Preparing for the Future, Ofcom soon proposed taking the 'hub' concept even further, by focusing regulation on 'content' rather than 'operational' issues. Effectively recognising that successive technological developments and parallel relaxations in the regulation of ownership should be reflected in regulatory practice regarding content regulation, Ofcom began to test the reasonableness of whatever efficiency was being proposed by a group before deciding to approve or reject any request. Key to its deliberations would be any possible implications for other, competing contractors in overlapping areas, and the effect of change on the range of choice available to the listener in any given area.

The areas in which this new approach has been tested most controversially include format changes, where the very nature of the programming - including its music policy - might be amended, as well as co-location, news hubs, syndication and automation. Syndication was another legacy from the 1980s, particularly where the IBA had been reluctant to let new, smaller stations produce their own programming on a twenty-four hour basis, believing their resources would be overstretched. Overnight programming, when much smaller audiences would be listening, had often come from programming 'hubs' (although the term was not yet in common usage), and in 1986 Beacon (Wolverhampton) was supplying a five-hour long programme to its neighbours, Mercia (Coventry), Signal (Stoke-on-Trent) and Wyvern (Hereford and Worcestershire), in which only separate advertisement breaks provided a distinction between the four versions of the same programme. Other initiatives had followed, such as a part-networked service from 1987-92 called The Superstation. GWR had syndicated Late Night Love with Graham Torrington since 1996 on a number of stations they sub-branded as 'The One Network'. The TLRC group – even before being acquired by UKRD - began simulcasting their evening programmes across all their own stations, and several other such initiatives followed. Co-location has also gathered pace: at the time of writing, the three stations in North-East England in Darlington, Durham and Northallerton, which were originally branded as A1FM, Durham FM and Minster Northallerton, were all rebranded as Star and co-located in Darlington. By simulcasting the same programming in daytime but retaining the ability to broadcast separate commercials in each area, the group retained the potential to earn income from small local advertisers while saving as much money as possible and remaining on air. The two Scarborough and Bridlington services of Yorkshire Coast Radio are licensed separately but also simulcast everything apart from local commercials, and while The Bee (Blackburn) and 2BR (Burnley) remain separate services, neither actually broadcasts from its own editorial area, because they share co-located premises in the town of Accrington which lies between them.

However, the most significant and most noticeable push at the boundaries of regulatory tolerance has been by Global Radio, a super group formed from the 2007 acquisition of Chrysalis Radio and the purchase in 2008 of GCap Media – itself a product of the merger in 2005 of Capital and GWR. In September 2008 Global began rebranding as many of its stations as possible as Heart and then set about reducing the operating costs of what became a new quasi-national FM brand by removing as much distinctiveness in content among them as Ofcom would allow. Extending syndication in daytime meant little local content remained. The rebranding meant that many long-established heritage brands were lost: 2CR (Bournemouth), 2-TEN FM (Reading), Champion (West Wales), Chiltern (Luton and Bedford), GWR (Swindon and Bristol), Marcher Sound (Wrexham and Deeside), Gemini (Exeter/ Torbay), Q103 (Cambridge), Essex FM, Severn Sound (Gloucester and Cheltenham), Ocean (Portsmouth and Southampton), Invicta (Kent), Lantern (Devon), Coast (North Wales), Fox (Oxford), Plymouth Sound, Orchard FM (Yeovil and Taunton), Southern FM (Brighton), The Buzz (Wirral), SGR (which had absorbed the two Suffolk stations Orwell and Saxon in 1992), Horizon (Milton Keynes), Broadland (Norfolk), Northants 96 (Northamptonshire), and Hereward (Peterborough). Later, in June 2010, the thirty-three separate stations now operating under the Heart brand were merged into fifteen Heart 'super stations', meaning what local output remained was moved to regional news and programming hubs. In January 2011 a second dramatic consolidation of Global's portfolio of radio stations was achieved through the merging of the six regional Galaxy stations in Scotland, the South Coast, Birmingham, Manchester, Yorkshire and North-East England with its remaining heritage ILR stations Red Dragon (Cardiff), Trent (Nottingham), Ram (Derby) and Leicester Sound under the Capital brand into another quasi-national FM network. Only the breakfast and drive programmes are now produced separately in the regions, while for the rest of the broadcast day London output is relayed and disguised through the pre-recording and voicetracking of regional variations of some of the London-based presenters' links. Regionally compiled news bulletins, traffic and travel and of course commercials, add to some apparent localness that meets Ofcom's new regulatory focus on output, as opposed to process. According to Global, this is 'local radio, delivered nationally'.

What future for local radio – live and local no more?

Global Radio's clever consolidation of its portfolio of local and regional stations into two more easily recognisable quasi-national brands that require a fraction of the production effort needed when they were launched, was a resounding triumph of the commercial over the local. Whereas the extent to which commercial radio was able to finally break the BBC's monopoly of radio broadcasting in 1973 was deliberately limited to relatively small, local audiences, the commercial sector is now better equipped to compete with the BBC's national analogue music services, Radios 1 and 2. Although this might make good commercial sense for entrepreneurs investing in the radio sector it does depend to a certain extent, on listeners not caring about the diminution of localness it has produced. Because some requirements remain to produce a minimum amount of local content, groups who would prefer to homogenise as much as possible the individual stations within their portfolios must still produce some bespoke material targeted at listening communities within each individual station footprint - but are listeners fooled? Radio is a very clever medium, and many of the people who run it or work in it are ingenious in adapting its inherent characteristics in order to exploit them to the full. However, the recreation of local radio that digital production and distribution technology allows us in the twenty-first century is not without its critics. The network of forty BBC local radio stations is not immune to challenge or change, either. At the time of writing, afternoon programme syndication in order to cut costs was being trialled at three Yorkshire stations, (BBC Radio Leeds, BBC Radio York and BBC Radio Sheffield) and two in South-East England (BBC Radio Kent and BBC Radio Sussex & Surrey) (Plunkett 2010). The BBC's Delivering Quality First initiative threatens to recommend extending syndication, to the further detriment of localness in BBC local radio.

However, the final chapter of Local Radio, Going Global (Starkey 2011) begins a discussion as to whether it actually matters whether a significant amount of radio is locally owned and operated. Perhaps the greatest test of localness in local radio may be the market – commercial and public service. In the case of the commercial sector, sometimes niche markets abandoned by big players can be exploited by new entrants into the business, and as different big radio groups abandon some key elements of local radio in favour of greater consolidation and homogenisation, community, internet or even newer forms of radio we have not yet imagined may appear, in order to fill the void. Community radio is being documented elsewhere, but typically stations depend heavily on volunteers and few have many salaried staff, if any at all. Yet, if high levels of professionalism in community radio can be achieved and sustained, they may yet keep localness alive in the medium of radio. Once, many local communities only had recourse to a local newspaper and – if they were very lucky - a local radio station or two, if they wanted to access local information or participate even passively in local discourse and controversy. These were the only media in which local and regional cultural diversity could be reflected. The arrival of the internet, with local and hyper-local websites, blogs, social networking and 'tweeting' has changed all that. Much of this content is, though, not only controvertible but highly problematic in ways that public service broadcasting sets standards and follows codes of practice to avoid. If localness in radio is still and is to remain important, preserving and stimulating it may ultimately depend entirely on the will of legislators and regulators to sustain it. Distinctiveness may be expensive compared to the relative cheapness of generic imaging and content, but the preservation of heritage – both cultural and radiophonic - may yet be worth considerable effort and expenditure as well as political will. For some local listening communities, being live and local may prove to be a cultural lifeline as well as a guarantor of local debate and democracy – and one they should not have to be without.

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