

RADIOCENTRE BRIEFING ON MEDIA GREEN PAPER

The Media Green Paper has significant implications for radio and audio. Government must ensure that any DTT switch-off does not impose unsustainable costs on radio and put services at risk, and that new prominence measures also recognise trusted UK audio rather than just elevating the television PSBs.

FUTURE OF TV DISTRIBUTION – THE HIDDEN IMPACT ON RADIO AND LISTENERS

The DCMS Green Paper, [Watch this space: a new strategic direction for UK Media](#) (published 23 June), sets out proposals for switching off Digital Terrestrial Television (DTT / Freeview) and moving fully to internet-delivered TV when current licences expire at the end of 2034.

While this is presented primarily as a decision about television, it will have a major impact on the radio industry. Commercial radio shares much of the same transmission infrastructure as DTT. If DTT closes, the costs currently shared between TV and radio could be reallocated to radio broadcasters, creating a significant new cost burden from 2035 onwards.

Radiocentre has commissioned economic analysis to model the anticipated impact. Initial results indicate this is likely to have a major cost impact on commercial radio broadcasters. This work will be shared with government and fed into a joint DCMS and industry Digital Radio & Audio Review which is underway.

WHY TV DISTRIBUTION AFFECTS RADIO

Traditional broadcast TV (DTT) and radio both rely on Arqiva's UK-wide broadcast transmission network, including hundreds of shared sites which carry both radio and DTT services. Many of the costs of this network (masts, sites, buildings, equipment, etc) are fixed, and do not disappear if DTT closes. A switch-off would leave radio broadcasters facing a sharp, structural increase in transmission costs simply to keep services on air.

A MAJOR COST SHOCK FROM 2035

In the event of a DTT switch-off in 2034, economic modelling estimates a significant increase in transmission costs, with a major cost shock for commercial radio in particular.

- **Severe cost shock** – commercial radio transmission costs would rise by over 50% per year with no offsetting revenue would significantly impact commercial radio's financial sustainability.
- **Particular threat to local radio** – services most reliant on shared infrastructure, such as popular national services on DAB, face the largest proportional rises. However, local and rural stations on thin margins are also especially exposed to the increase in transmission costs.
- **Stations could be put at risk** – without mitigation, the cost shock could put a significant number of commercial radio services under severe pressure, risking local coverage, listener choice and plurality, especially in rural communities.

DTT RECOMMENDATIONS

The future of TV distribution is not a TV-only question. Before any decision is made on DTT switch-off, government should:

- **Give radio a formal role** – commercial radio must be directly involved in the next stage of policy development. The impact on radio should be built into the decision from the outset and assessed alongside the Digital Radio & Audio Review.
- **Agree comprehensive cost mitigation** – if DTT is switched off in 2034, radio broadcasters should not be left to absorb the fixed infrastructure costs arising from a television policy decision. Government should agree appropriate financial mitigation, including transitional support where necessary. Without this government should adopt the 2044 timetable.

PROMINENCE AND DISCOVERABILITY – AUDIO MUST NOT BE LEFT BEHIND

The Green Paper proposes new approaches to make trusted news easier to find on social media and public service media content more prominent on third-party platforms. The policy objective is to ensure that audiences can easily access high-quality, trusted and UK-originated content in an increasingly fragmented media environment.

However, the proposals are framed mainly around television and the existing public service broadcasters (PSBs). The omission of audio is increasingly significant as listening shifts towards podcasts, video podcasts and other on-demand formats whose discovery is increasingly mediated by third-party platforms and algorithmic recommendation systems.

The same public value arguments used to justify prominence for news and public service media apply to much of the trusted, human-curated and UK-originated content provided by commercial radio and audio providers. **Without a broader approach, there is a risk that trusted, UK-originated audio content will be left behind.**

The case for action will only strengthen as AI-generated content proliferates online. Trusted media, underpinned by editorial judgement and clear lines of accountability, will become increasingly important to audiences seeking reliable sources.

WHY AUDIO SHOULD BE INCLUDED

- **Trusted news and information** – commercial radio reaches 40 million listeners each week and broadcasts more than 10,000 news bulletins each week. Its short, accessible updates particularly resonate with audiences who may not actively seek out news.
- **Public value beyond news** – commercial radio provides companionship and connection, creates shared cultural experiences and promotes UK music and talent – all through regulated, editorially accountable services.
- **Innovation with new formats** – commercial radio broadcasters increasingly complement their live output with podcasts and video podcasts that provide journalism, political analysis, education, entertainment, cultural content and companionship.

THE RISK OF A PSB-ONLY APPROACH

Defining eligibility solely by reference to the existing list of television PSBs may appear simple, but it would not be neutral. It would entrench the position of a small number of incumbents while excluding other trusted and accountable UK providers that deliver significant public value. The result could be to narrow media plurality rather than protect it, while making UK-originated audio harder to discover.

PROMINENCE RECOMMENDATIONS

- **Include radio and audio** – the proposed prominence regimes must comprehensively address UK radio and audio. Wider public service media prominence should not be confined to the existing television PSBs, and should take account of the broad public value provided by commercial radio and audio services.
- **Recognise content across formats** – commercial radio broadcasters increasingly create and distribute multimedia content – including audio and video clips, news stories, and social feeds. This content should be considered in the round when designing a prominence regime.
- **Ensure policy is joined up** – these prominence regimes should not be developed in isolation. Detailed proposals should be aligned with the joint DCMS and industry Digital Radio & Audio Review, with audio providers involved in their development before the White Paper is finalised.