

The Passing of Paternalism: Public Service Television and Increasing Channel Choice

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National governments around the world have sought to harness television and radio for beneficial cultural, civic and educational purposes. They have mainly done so in two ways: they have obliged broadcasters to achieve certain thresholds of quality as a condition of permission to broadcast. And they have funded public service broadcasters such as the BBC, ARD and ZDF in Germany, and NHK in Japan. These large corporations have privileged use of the airwaves and are funded through taxation, a license fee, or a combination of both.

The Changing Audience

The continuing relevance of both these models of public service broadcasting is subject to heated and continuous debate as the structure of the broadcasting market changes, particularly as increasing numbers of consumers are able to access larger numbers of less regulated channels, via digital terrestrial, satellite and cable delivery platforms. The debate will continue in the U.K. under the regulatory scheme for broadcasting under the Communications Act 2003, and through the life of the BBC Charter and Agreement.¹

Promoting the transition to digital by 2010 was set out as a key government objective in 1999. Whether or not this target is realized in the strictest terms, it is clear that the number of channels available in the U.K. has grown rapidly over the last decade, and the overwhelming majority of households will have at least 24 channels available within the life of the next BBC Charter.

The shifting technical context of broadcasting forms the backdrop for ideological debate about the merits of commercial versus public provision. The BBC has come through successive rounds of policy debate relatively unscathed. The postwar Beveridge report was the last serious attempt to protect BBC monopoly against commercial competition.² The Pilkington

¹ The current BBC Charter is due to expire in 2006. The lifetime of the Charter and Agreement is usually ten years.

² Beveridge [Chair], *Report of the Broadcasting Committee Session 1950–51*. Cmd 8116, Cmd 8117. London: HMSO, 1949. cf www.bopcris.ac.uk/bop1940/ref467.html

Committee outlined a strong defense for public broadcasting in the early 1960s, recommending the setting up of a second BBC channel.³ Skeptical about the intrinsic value of choice and competition, the Annan Committee recommended the transfer of scheduling and advertising functions to the regulator in 1977.⁴ In contrast, Peacock, in the strongly neo-liberal context of the 1980s, stopped short of suggesting a privatized, subscription-based BBC. The committee did suggest the setting up of a public broadcasting council to administer funding to program makers, but this was not implemented, and the report concluded that radical changes could be deferred to see how the market developed.⁵

The broadcasting market has developed hugely since Peacock reported, but the ideological context has also shifted. Debate since then has tended to focus on the justification of public provision in the changing market and the extent of market failure. The Davies Committee recommended a substantial increase in the license fee, but was not asked to look at broader justifications of public service broadcasting (PSB) in the new context.⁶

With the gradual introduction of alternative channels, there has been a slow reduction in the BBC share of the overall television audience. This essay considers the previously perennial, but of late strangely neglected issue in broadcasting policy: the impact of increasing competition and choice on the relationship between public service broadcasters and their audience. In the 1920s, the Crawford Committee specifically rejected competition and channel choice for early radio, finding the U.S. experiment with commercial radio chaotic and undesirable. During the period of BBC monopoly there were two, then three national radio services to choose from, and a similar pattern was repeated for television, as set out in figure 1 below. This was the context in which the tradition and culture of U.K. public service broadcasting was formed. When the BBC made space for commercial television and radio, these channels were licensed with strong public service requirements. Similar patterns were found in other markets, such as that in Germany and Japan.

The impact of competition and increased choice on public service broadcasting continued to be at the heart of the debate when the Pilkington and

³ Pilkington [Chair], *Report of the Broadcasting Committee 1960*. Session 1961–62, Cmnd 1753. London: HMSO, 1962. cf www.bopcris.ac.uk/cgi-bin/dispbyrec.pl?searchtext=pilkington&record=/bop1955/ref698.html

⁴ Annan [Chair], *Report of the Broadcasting Committee 1977: The Future of Broadcasting*. Session 1976–77, Cmnd 6753. London: HMSO, 1977. cf www.bopcris.ac.uk/cgi-bin/dispbyrec.pl?searchtext=annan&record=/bop1974/ref3468.html

⁵ Peacock A [Chair], *Report of the Committee on Financing the BBC*. London: HMSO, 1986.

⁶ Davies G. et al., *The Future Funding of the BBC*. London: DCMS, 1999.

Figure 1. Television Channels Available in the UK

	Year	Number of television channels broadcast to UK homes			
		analogue	cable	satellite	DTTV
	1950	1			
	1955	2			
	1960	2			
	1965	3			
	1970	3			
	1975	3			
	1980	3			
First cable service launched	1985	4	(5-10)		
1989 Sky launches four channel service	1990	4	(5-30)	(4)	
	1995	4	30-100	(4-100)	
1997 Channel 5 launch; 1998 DTTV launch	2000	5	30-100	100-180 (approx.)	24
	(2005)	5	30+	200+	24
Uncertainty regarding convergence (on-demand) and DSL services	(2010)	5	30+	200+	24
	(2015)	0	30+	200+	24

Annan committees discussed the possibility of introducing new channels in the 1960s and 1970s. But it is during the current period of digital switchover that a trickle of new channels is turning into a flood. Because the U.K., in comparison to North America and continental Europe, has had relatively undeveloped cable television, the transition to digital is being experienced as a sudden ramping-up of choice with rapid satellite rollout and an increase in the number of channels available on many of the main platforms. This has coincided with the rapid take-up of the alternative platforms among all segments of society and is having a dramatic impact on the U.K. ecology of public service broadcasting. Critics of the BBC have even gone as far as to say that increased channel choice undermines the very rationale of PSB. Unfortunately, however, the debate is based on research funded by interested parties and a lack of independent data.⁷

⁷ There is in fact a very clear reason for the lack of independent audience research. The industry standard research is privately owned and almost impossible for independent researchers to use. The British Audience Research Bureau (BARB) provides no public interest data for

This essay will use audience data from the U.K. and Germany to examine the impact of increased channel choice on the audience for public service broadcasting genres. While many of the points made here can be applied to PSB in radio, this examination will focus on television, as detailed genre-based data are more readily available. German data are used as a comparison for two reasons. First, because of the broad similarity between the PSB traditions in Germany and the U.K. and second, because more than 90 percent of German television homes are already served by cable or satellite and therefore have a good deal more choice of channels. Every country has a slightly different method of gathering audience data, and a different level of market penetration of increased choice television services. They also have a different range of approaches to measurement of public service genre performance. Note that because of different measurement methodologies, in different countries, these data are not strictly comparable. They should be thought of as different and both as valid means to research the same broad questions.

What happens when viewers are exposed to increasing choice and control over what they watch? Do they cease to watch public service content? Do they prefer some genres to others? The current period is analogous in some ways to the early 1960s when the BBC adjusted to the presence of commercial television. But in contrast to previous periods in the extension of choice in broadcasting, when new channels were offered that basically conformed to a PSB framework, the current expansion includes services with very low PSB content obligations. As figure 2 shows below, most regulatory obligations fall on those channels that established themselves in analogue terrestrial transmission.⁸

Homes with Cable, Satellite and Digital Terrestrial Television

Reithian⁹ public service broadcasting has been described as soft paternalism. Schedulers, who always had one eye on the ratings graph and the other on their PSB obligations, could “hammock” public service programs between high rating entertainment and sport. In a process that would have pleased nineteenth century cultural theorists such as Matthew Arnold, the more apa-

independent researchers and as a consequence public debate in the U.K. is blind, relying on some researchers that are fed specific data tables and reports of the large corporations that fund BARB and themselves have a clear set of interests to defend. The U.K. data presented here have been provided by Human Capital, an independent consultancy.

⁸ See also Foster et al. 2004, in Damian Tambini and Jamie Cowling, ed., *From Public Service Broadcasting to Public Service Communications*. London: Institute for Public Policy Research, 2004.

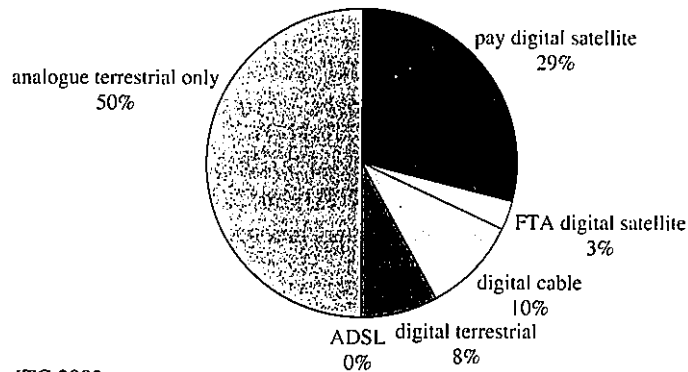
⁹ Lord John Reith was the first director general of the BBC, serving 1922–1938. He is widely credited with establishing the U.K. tradition of paternalism in public service broadcasting.

Figure 2. Regulatory Obligations of the Main Television Broadcasters

Tier	Channel	Examples of obligations
1	All TV broadcasters on all platforms	Program content standards, subtitling, advertising/sponsorship rules
2	BBC 1, 2 Channel 3, 4, 5 teletext	All the above and: Production quotas, quality news and current affairs, schools programming, regional programming
3	BBC 1, 2 Channel 3, 4, 5	All the above and: Self-imposed obligations within a general PSB remit (eg C4 Charter, statements of program policy).

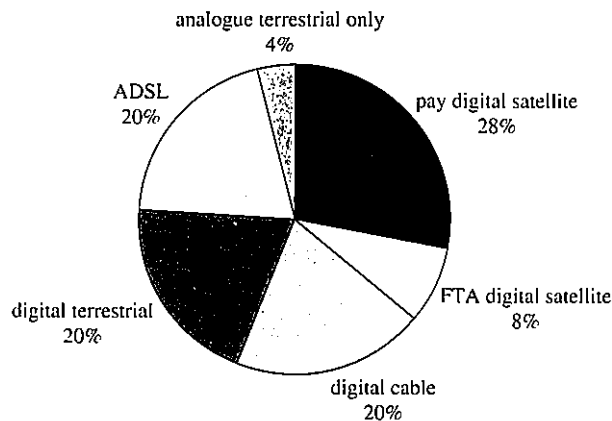
Source: Communications Act 2003

Figure 3. TV Households in the U.K. by Platform 2003



Source: ITC 2003

Figure 4. TV Households in the U.K. by Platform 2013 (PCMLP estimates).



Source: Oxford University Programme in Comparative Media Law and Policy (based on ITC BBC projections published in 2002)

thetic the couch potato was, the less likely he was to switch off when ambushed after *The Generation Game* with some improving *Civilization*. The U.K. approach to PSB has embraced this vision by requiring the broadcast of specific genres of programming at peak time.

Several authors have measured PSB performance in terms of the relative performance of channels with significant PSB obligations in terrestrial only versus multi-channel¹⁰ homes. The Independent Television Commission (ITC) regularly monitors performance and, as one would expect, finds that the share and reach of the main five channels is consistently lower in multi-channel homes. This approach has been taken by Collins¹¹ and also by Barwise.¹² On the basis of these measures of channel performance, these authors claim that, "viewing habits in the U.K. and U.S. have changed little in response to the huge investment in new television channels."¹³ This is a matter of degree. Whereas it is true that the "big five" channels,¹⁴ which have stronger PSB duties, have held up well, they are uniformly in decline. The audience share of BBC1 in all U.K. homes declined by only 1.4 percent between 2000 and 2003, but it and the other PSB channels all notched up declines in audience. And while the BBC has continued to record 30-35 percent of audience share in analogue terrestrial homes between 2000 and 2003, their share in multi-channel homes, which represent the future, has declined by one percent and remains around 20 percent.¹⁵

The PSB channels do lose audience in multi-channel homes, but viewed in terms of reach, not by such a great deal, as shown in figures 5 and 6. These figures show what one might expect: that the audience for the top five channels, which are those with the most public service requirements, is declining. Interestingly they do not show that performance in multi-channel homes is inversely related to the level of PSB obligations. Although BBC2 does take a big hit, down 30 percent in SkyDigital as compared with analogue only homes, Five performs rather worse, and both BBC1 and Channel 4 audiences maintain their share.

¹⁰ Those channels that are not available through analogue terrestrial television broadcast signals and are only available through the digital terrestrial, direct-to-home satellite and cable platforms.

¹¹ Collins et al., "The Future of Public Service Broadcasting in the United Kingdom," in P. Donges and M. Puppis, *Die Zukunft des öffentlichen Rundfunks*. Koeln: Herbert von Halem Verlag, 2003, pp. 111-130.

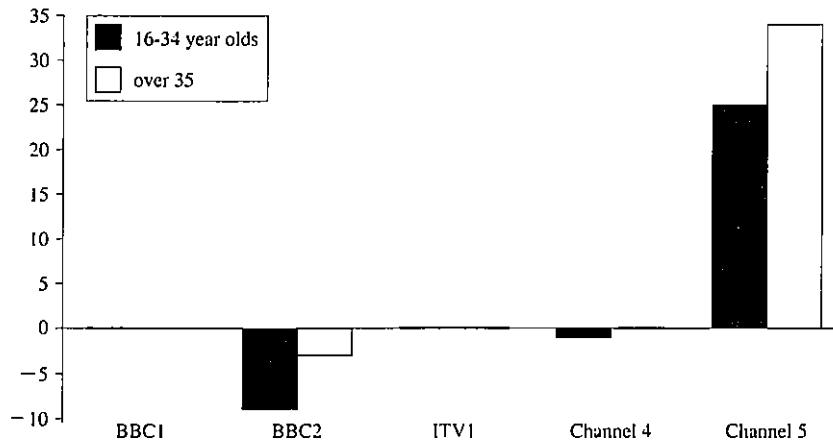
¹² Barwise 2003.

¹³ Collins et al. 2003: 1.

¹⁴ These are BBC1, BBC2, ITV1, Channel 4 and Five.

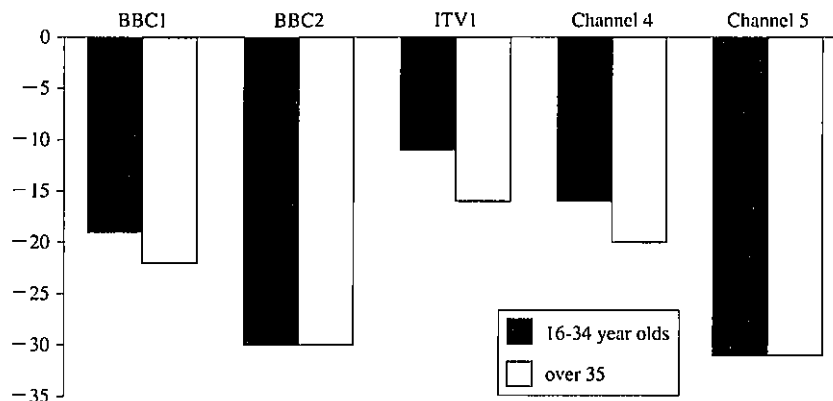
¹⁵ ITC, "The Broadcasting Acts of 1990 and 1996," ITC Note 3. London: ITC, 2003. Available at www.itc.org.uk

Figure 5. Percent Change in Reach: Sky Digital vs. Analogue



Source: MTV/Human Capital

Figure 6. Percent Change in Average Minutes Viewed: Sky Digital vs. Analogue



Source: MTV/Human Capital

Analysis of public service broadcasting channels on the various platforms shows that their audiences are consistently lower among consumers with access to the new platforms, but not perhaps as bad as one might have thought when one looks at the quantity of channels available, as shown in figures 5 and 6. Looking at channel ratings alone is a very limited way of assessing the impact of multichannel. Merely measuring audience by channel tells us nothing about the possibility that those audience performances have been achieved by leveraging brand and existing popularity, while watering down less popu-

lar public service programming. The policy debate surrounding the BBC in recent years has certainly been focused on accusations of “dumbing down.” Equally, in mixed-schedules, people may continue to watch the public service channels, but not PSB programs on them. So the continuing popularity of public service broadcasters might mask an overall decline in viewing of public service programming.

Genre Measures

There are therefore limitations to an approach based on the measurement of audiences of specific public service broadcasting channels. Such an approach may chart the health, or decline, of public service channels but completely miss trends in the performance of PSB genres. Luckily, both U.K. and German audience data do permit us to interrogate the performance of genres.

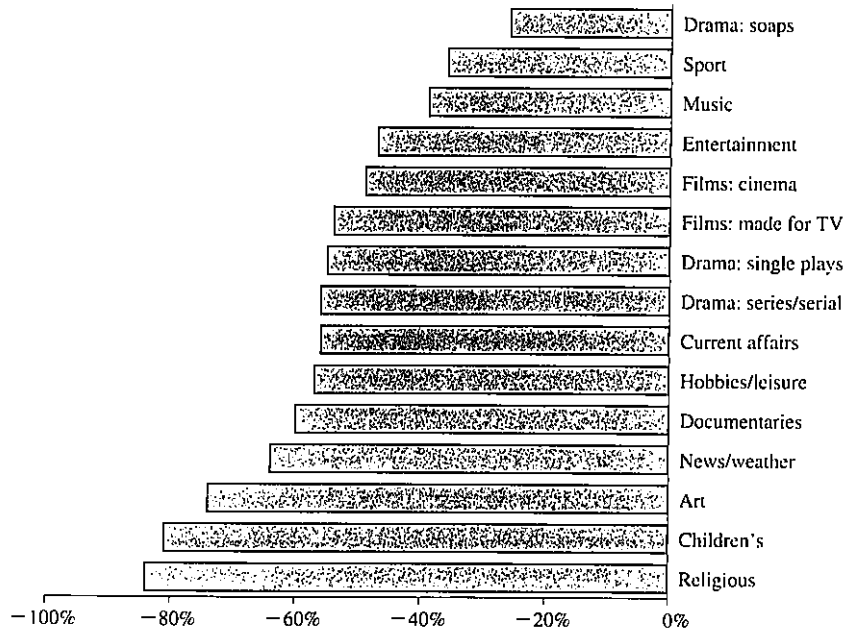
Traditionally, PSB has attempted to deliver content of superior quality and production values to the greatest audience. Specific public service genres, such as news, information, and education, have been more favored than others, such as sport, erotica and game shows, and the mixed schedule has been a vehicle for ensuring higher audiences for that material. In a situation where audiences are high and choice is low, public service broadcasting obligations were a very effective instrument of doing that. For example, in 1950 there were around one million television sets in the U.K. and one television channel. However, as choice increases, it becomes more difficult to deliver public service genres to homes.

Figures 7 to 10 clearly indicate the relative levels of popularity of public service genres in multi-channel homes. Note that in the U.K. data we are measuring the performance of these genres of programming within the top five channels in multi-channel and terrestrial homes, not the size of the total audience for this form of programming.

A similar effect is observable in Germany. We have not chosen here to restrict the analysis to the top five channels as the U.K. data did, but to show the total effect on PSB genres across all households. Figure 9 shows the extent of the drop in share of the total number of minutes spent watching television of the key public service genres. In short, they show that people watch less programming of the traditional public service genres when they have more choice.

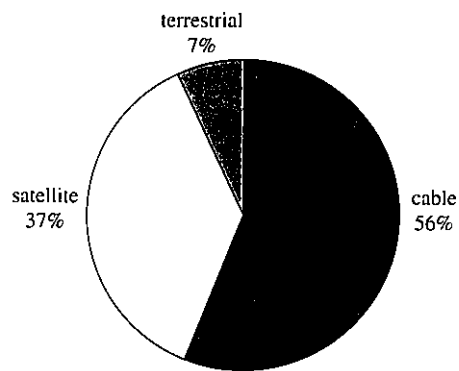
The multi-channel effect is just as clear in the case of children. Figure 11 shows that children watch less drama and markedly less factual content when they have access to multi-channel television. The proportion of viewing of factual content declines from 5.2 percent to 1.6 percent of all viewing. The same ITC report showed that multi-channel children watch markedly more

Figure 7. Drop in Share through Dsat Platform

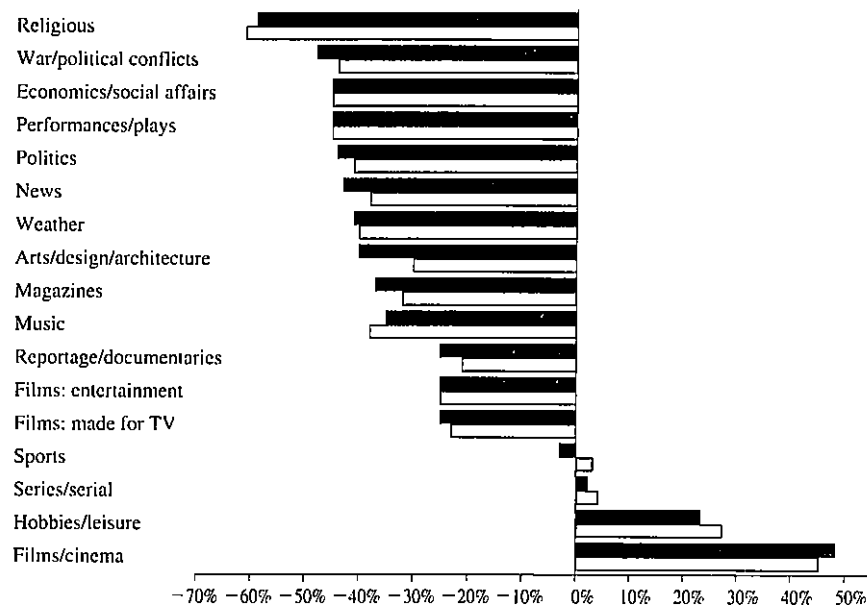


Source: Human Capital

Figure 8. German Market: Share of Audience by Platform



Source: AGF/GfK Fernsehforschung, methodenbericht

Figure 9. Drop in Share through Cable and Satellite: Germany

Source: AGF/GfK Fernsehforschung, methodenbericht

Notes: Period of data collection: Jan. 1, 2002–Dec. 31, 2002. Diagram illustrates the drop in share according to market shares of the different genres. The data used for this diagram refers to all TV-viewers who actually watched the programs. For reasons of economy and organization GfK's surveys do not include all households in Germany. In fact a representative panel is built up on specific statistical methods. In the panel's households a GfK-meter is installed that measures the TV-viewing behaviour of all TV-viewers in the household up from three years detailed on a second. The data are saved in the meter and are transmitted to the GfK during the night via modem. The data collected from the panel are extrapolated on all German households. The panel consists of 5,640 households with 13,000 TV-viewers over three years.

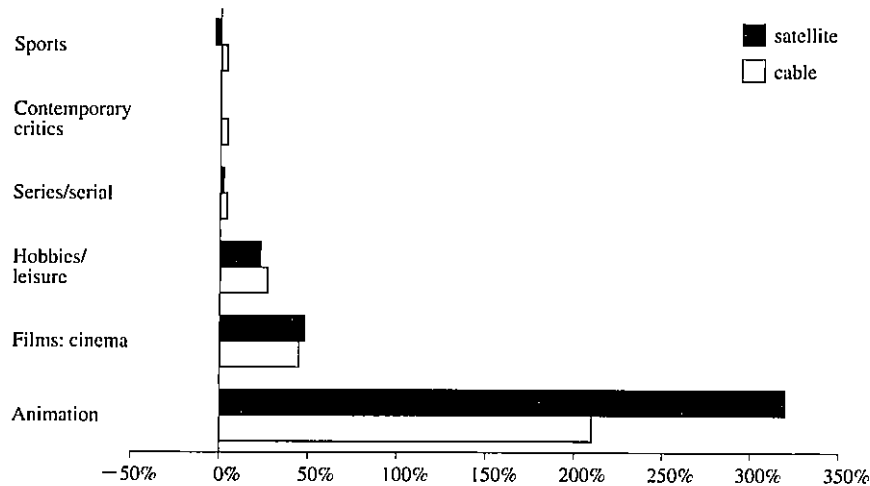
animation, 54 percent of total television time, than do terrestrial only kids, 39 percent.¹⁶ If factual and drama, in the traditional sense of paternalistic public broadcasting "do you good" then in the new environment it is clear that television does kids less good.

Can You Take a Horse To Water? Is It Thirsty?

Clearly, the effect on PSB genres is not uniform. Although the reporting cate-

¹⁶ Atwal et al., *What Children Watch: An Analysis of Children's Programming Provision Between 1997–2001*. London: ITC/BSC, 2003.

Figure 10. Drop in Share through Cable/Satellite: Germany (all Genres)



Source: AGF/GfK Fernsehforschung, methodenbericht

Figure 11. Viewing to Children’s Programming 2002

Average minutes of viewing per day	Terrestrial children	Multi-channel children
Total	30	39
Drama	3.6	1.6
Factual	5.2	1.6
Light entertainment	5.0	3.0
Pre-school	3.8	4.6
Miscellaneous	0.7	2.4

Source: Atwal et al., *What Children Watch*

Note: BARB Monday through Sunday. Terrestrial television children watch: BBC1, BBC2, ITV1, Channel 4, Five. Multi-channel television children watch: BBC1, BBC2, ITV1, GMTV, Channel 4, Five, Boomerang, Cartoon Network Total, Disney Channel Total, Playhouse Disney, Toon Disney, Fox Kids Total, Nickelodeon Total, Nick Jr. Trouble, CBBC, CBeebies.

gories in Germany and the U.K. are not identical, we can see that religious programming is the genre that declines most sharply in both German and U.K. cases. News and information, the other main PSB genre, seems also to lose viewers when viewers have the choice of watching other content. The figures for Germany apply to the genres across all channels, rather than just the big five as do the U.K. figures. Therefore they illustrate that the time spent watching television news by satellite viewers is actually 43 percent lower than the time terrestrial only viewers spend watching news.

We saw that the data provided on channel performance are inconclusive with regard to the broader challenges facing PSB. If they demonstrate anything, they demonstrate that the existing PSB channels audiences are holding up very well in comparison to the picture painted by their competitors. Data on performance by genre is more sobering for PSB enthusiasts. There seems to be overwhelming evidence to support the thesis that PSB genres suffer much more in multi-channel homes than do entertainment and sport genres. In other words, when they have the choice between watching public service genres and watching other genres, the viewing of public service genres tends to decline.

There might be some methodological problems with this data. It might be asserted that we are in fact measuring the effect of the fact that the early adopters of digital are not representative of the population as a whole. That is just about plausible in the case of the U.K., where approximately half of households receive TV. However, the German data represents a market at a different state of development, in a more developed market where multi-channel availability is not restricted to early adopters. In Germany, those who have access to multi-channel television make up the majority of consumers. What we appear to be measuring here is the impact on increased choice on the propensity to watch PSB.

Clearly, there is a need for more research, but these data are illustrative of a major current change in our broadcasting culture, with far-reaching consequences for the PSB framework. In fact, the main U.K. public broadcasters have all but accepted these trends. Mark Thompson, when still at the BBC in 2000, summed up their strategy for abandoning the mass, mixed-schedule public service channel in the light of increased competition and choice. "Now I don't think it would be right (or possible) to move overnight from our traditional mixed schedules into fully genre-based or attitudinally focused channels, but I believe that unless we start the journey soon, we risk becoming irrelevant."¹⁷

Evidence from psychological and social psychological studies supports the view that people will tend to use broadcasting services almost regardless of what is on.¹⁸ In that context, a restriction of choice of broadcasting services is a particularly effective way of delivering selected genres. Where there is increased choice and control, however, entertainment will win. Education and culture are, almost by definition, cultural phenomena that require external discipline. Public service broadcasting has provided some of that discipline, but

¹⁷ Thompson M., "Zapped: Why Public Service Television Has to Change." Speech Banff, June 12, 2000.

¹⁸ Silverstone R., *Television and Everyday Life*. London and New York: Routledge, 1994.

as channel choice has increased, it is no longer able to make viewers' choices for them.

The choices are starker when viewed in a broader public policy context. It may be seen that devoting resources to education delivered over the airwaves is no longer the most cost-effective way of doing this. It may be that the same public funding given to existing educational institutions might be more effective than funding educational TV. Equally in the area of news and information, television remains the primary source of news, but it is by no means the only source, and others, including traditional newspapers and online news providers do provide what citizens need. So it would be a mistake to assume that public service television is the only potential supplier of public service information goods. There are areas, however, such as local and regional news, where it is clear that a decline in provision would result in very serious consequences for citizens and consumers, and research is required on precisely what we are confident could be delivered by the market with no loss to public welfare.

It is of course important to note that even if the classic PSB genres are watched less in a multi-channel environment, it may remain the case that public service values in other genres such as entertainment remain strong. Public service drama, according to many in the industry, remains distinctive, though public service provision in sport may be harder to defend.

Conclusions: Public Service Communications after Paternalism

PSB has always been ideologically ambivalent. In terms of the key cleavages of contemporary politics, it has appealed both to social conservatives and to statist anti-capitalists. Public provision and regulation have generally troubled British liberals on the other hand, and with the extension of new technology they are likely to do so to a growing extent.

The debate is also split between fatalists who may not like the new age but think it is inevitable, and activists, who think that the degree of change is wildly exaggerated. The latter claim that venerable PSB institutions could be maintained more or less as they are if only the political will were there. Both are wrong. Public service in communication must survive and must change to survive.

Clearly the old paternalist-hypodermic civilizing mission of PSB has seen its zenith. The new era of public service communications (PSC) will be different, both for publicly owned or funded broadcasters and for those commercial broadcasters whose public service obligations are conditions of license.

The foundations of public service broadcasting are shifting. The basic pact upon which it has been based is being undone and another one is being devel-

oped. On one hand, the spectrum for service deal is breaking down. When once the government could trade public service obligations for cheap use of the airwaves (spectrum) by commercial public service broadcasters, a license to use analogue spectrum is not a precondition of broadcasting now and the broadcasters are exposed to more competition. On the other hand, in a world of choice as we have seen, the audience is not going to choose what it is told to choose. This impacts all public service broadcasters, not only the public sector broadcasters.

Clearly, more research is needed if we are to fully understand the differential impact on specific PSB genres as broadcasting develops during the transition to digital. It is clear that some PSB genres suffer more than others.

The most fundamental impact of this shift in broadcasting culture is economic. If the commercial public service broadcasters lose audience as a result of their obligation to deliver worthy content, they may seek to remove those obligations in an all-digital context. This would be complex under existing licenses, but the strictest PSB obligations apply to those channels that hold an analogue terrestrial license. ITV1 and Five after switchover will be competing directly with broadcasters with much fewer obligations and will be quick to ask for a level playing field.

Much of what has been described in this essay is non-controversial among broadcasters. Indeed, the acceptance that hammocking and the mixed-schedule is in decline formed an important part of the BBC's argument for new digital channels.

The dismantling of the mixed schedule will not please those who see the role of major public service broadcasters as providing a national public forum for debate. Clearly, there will be decisions to be made regarding whether the public benefit of certain PSB content obligations, such as for example regional news, justify the opportunity cost. These decisions should be made with regard to a broad sense of the public value of programming, not merely reported individual opinion or size of audience.

Neither should the changes that have been outlined in this paper cause us to lose sight of the more general justifications of public service provision many of which become stronger in the new environment. The most significant of these, particularly in the light of a shift away from ownership rules, is the need for pluralism. Of late, leading commentators such as Andrew Graham have argued that the justification of public service broadcasting is more fundamental than correction of market failure. He argues that public broadcasting is now basic to our civil and political rights and non-negotiable.¹⁹ While this is

¹⁹ Graham A., "A Non-standard Defence of PSB." Transcript. Oxford Media Convention 2003: Public Service Communications. Oxford University, January 15, 2003. London: IPPR.

an attractive argument it still requires that PSB be watched and heard. And that is the challenge that public service broadcasters face in the coming decade.

New Directions: From Public Service Broadcasting to Public Service Communications

In the new context, existing public service broadcasters have begun their evolution into the new communications framework in the U.K. Already, new directions are opening up.

Public service communications is non-didactic. It is clear that the BBC and other public service communicators will have to focus on making the good popular as well as making the popular good. If the transition to digital does lead to a collapse in the audience for regional news, there is a particular challenge for broadcasters to make regional news more interesting and attractive. There is surely an argument for a review of regional news to make its provision relate not to the artificial boundaries of BBC and ITV transmitters, but to the cultural, political, and administrative units that make news meaningful.

Public service communications is on-demand. As the potential for new, on-demand, interactive, and online services grows, the role of public service communications (PSC) develops in 3 ways:

- *Civic Commons.* Just as broadcasting transformed democracy, so is the Internet. There is clearly an innovative role for public provision as Steven Coleman argues.²⁰ Ventures like BBCi's iCan service are a step in the right direction.
- *Creative Commons.* In September 2003 Greg Dyke announced that the BBC was launching a project known as the Creative Archive.²¹ This would, in the long term, open up the archive of the BBC to on-demand access via broadband.
- *Education Commons.* As choice expands, television in the home can no longer replicate the discipline of the classroom. Public service education needs to closely serve the curriculum and take advantage of the economies of scale of the new economy.

PSC focuses on distinctiveness and search for areas of added value and dis-

²⁰ See "From Service to Commons," in Tambini and Cowling, eds., *From Public Service Broadcasting to Public Service Communications*.

²¹ Dyke G., "Richard Dunn Memorial Lecture." Speech to Gurdian Edinburgh International Television and Film Festival, Edinburgh, August 24, 2003. Available at www.bbc.co.uk/pressoffice/speeches/stories/dyke_richard_dunn.shtml.

cernable quality. Decisions will have to be made regarding the effectiveness of, for example, drama, not sport.

To evolve such new directions as we have seen is not merely to give an open checkbook for public service broadcasters. Everything they do must be demand-led, and based on clear principles of proportionality, external regulation, and accountability.

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