



The Market for Web Radio

Streaming, Catch-up and Smart Radio

**Market &
Data
Reports**

Online audio services are expected to achieve revenue of EUR2.1 billion in 2012 to account for 10% of the total audio services market. This study examines the various distribution modes, tools and technologies associated with Web radio. It reviews the strategies pursued by key players and also the dynamics of audience and advertising growth in the market.

Key questions

- What will determine market growth between now and 2012?
- How will advertising revenue be affected by audience migration from broadcast radio to online audio services?
- How is radio listening being incorporated into the leading Web applications?
- What advanced features and functions complement radio (e.g., community-based websites, video offerings, etc.)?
- What strategies are players adopting: from content production to aggregation and radio program syndication, player control, in-stream advertising, etc.?



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1. Executive Summary

- Key findings
- New Internet audio services
- Radio audience trends
- Operator strategies
- High growth in online services

2. Methodology

3. Market key factors

- 3.1. Market overview
 - 3.1.1. Definition
 - 3.1.2. Market segmentation
 - Broadcast radio simulcasts
 - Elements of a radio broadcast
 - Linear radio specific to the Internet
 - Catch-up radio
 - Smart radio
 - 3.1.3. Web radio distribution
 - Direct distribution by Web radio service providers
 - Distribution via Internet aggregators
 - General-interest portals
 - Social networks
 - Media players and widgets
 - Mobile aggregators
 - 3.1.4. Product and service trends
 - Functional enhancements
 - Introduction of video
 - Linear/non-linear radio and personalization
 - New social features and functions
- 3.2. Current market estimate
 - 3.2.1. Market by segment and platform
 - 3.2.2. Market by geographic region
- 3.3. Key factors
 - 3.3.1. Key technologies
 - Program production
 - Broadcast encoding: online, unicast
 - Web radio reception
 - Transmission and reception of metadata
 - New terminals
 - 3.3.2. Regulatory environment
 - Situation in Europe
 - Royalty battles in the United States
 - 3.3.3. Usage
 - Web radio audiences
 - Audience structure
 - Content
 - New services: podcasts

4. Industry organization and strategy

- 4.1. Industry structure
 - 4.1.1. Value chain
 - PC-based consumption of audio content
 - Online audio services market
 - 4.1.2. Business models
 - Financing through advertising
 - What about a pay model?
 - E-commerce: music sales
 - Cost structure
- 4.2. Player strategies: case studies
- 4.3. Strategic options
 - Models of radio groups evolving to the Internet:
 - Spinoff
 - Aggregation
 - Syndication

5. Market forecasts

- 5.1. Growth factors
 - 5.1.1. Factors driving growth and shifts in the market
 - Web radio usage
 - Service access
 - Service use
 - The market for Web radio advertising
 - 5.1.2. Forecast assumptions
- 5.2. Market forecasts 2012
 - 5.2.1. Forecast for 2008-2012
 - Audio services in advanced countries
 - Market for broadcast and online audio services
 - 5.2.2. Detailed forecasts by region
 - United States, Japan, Western Europe (France, Germany, Italy, Spain, United Kingdom), Eastern Europe (Poland)
 - For each country studied:
 - Time spent listening to radio (hour/person)
 - . of which broadcast, online radio
 - Time spent listening to radio (billions of hours)
 - . of which broadcast, online radio
 - Audio advertising market (USD billions)
 - . of which broadcast

Case studies:

- AOL Radio • BBC • ClearChannel • Deezer • Facebook • Goom • Last.fm • Live365 • Mi-Xfm • NRJ Group • Play.It (CBS) • Sprint • Yahoo!

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