

Trends in Radio Research

Trends in Radio Research:

*Diversity, Innovation
and Policies*

Edited by

J. Ignacio Gallego,
Manuel Fernández-Sande
and Nieves Limón

Cambridge
Scholars
Publishing



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This book first published 2018

Cambridge Scholars Publishing

Lady Stephenson Library, Newcastle upon Tyne, NE6 2PA, UK

British Library Cataloguing in Publication Data

A catalogue record for this book is available from the British Library

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ISBN (10): 1-5275-1349-1

ISBN (13): 978-1-5275-1349-5

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PROLOGUE

PETER LEWIS

On my workroom shelf is a crystal radio receiver from the early 1920s—my father's; in my living room two radio receivers from the following decade—decorative furniture now. On their dials, lit up by the slowly heating valves inside, a reminder of the magical journeys that transported listeners across Europe on long and medium wave to Hilversum, Madrid, Paris, Stockholm, Berlin, Aberdeen, Belfast, London.

As we approach the centenaries across the world of the birth of broadcast radio, the contributions to this book mark another journey, of geography, of time and of discourse. Of geography in that the organisers of the Madrid conference where these papers were first presented wanted to “strengthen the relations between associations and researchers of Europe and Latin America”. Their selection is a strong answer to the complaint of Alfonso Gumucio Dagron, well justified when he wrote in 2001 in his introduction to *Making Waves* that Latin American media scholarship had been for a long time ignored in the Anglophone world. The majority of the contributions here are from Hispanic and Lusophone radio researchers.

It is a journey in time in the sense that radio research has come a long way since the pioneering work of Cantril, Lazarsfeld and Herzog in the 1940s. After television killed the radio star at the end of that decade the research money followed the more glamorous medium. For many years, radio remained a private passion but suffered public and academic neglect. This began to change: starting in the late 1970s community media became an object of interest to both UNESCO and the Council of Europe, stimulating a growing range of publications, while in 1982 the Local Radio and Television Group was formed at the International Association for Media and Communication Research (IAMCR)'s Paris conference. In the UK, the “Hearing is Believing” conference at the University of Sunderland in 1996 led in the following years to the *Sounding Out* series, which brought together radio researchers, sound artists and film sound practitioners. In 1998 the Radio Studies Network was founded in the UK and GRER (Groupe de recherches et d'études sur la radio) in France. From

2004 the IREN project (a play on acronyms in different languages to spell “International Radio Research Network”) involved 13 partners from 10 countries: Belgium, France, Germany, Greece, Ireland, Italy, Poland, Spain, Sweden and the UK. When European Union funding for IREN ended in 2006, the network of researchers was fortunate to find a home in ECREA (European Communication Research and Education Association), itself formed the previous year from previous European-wide associations; IREN morphed into the Radio Research Section of ECREA.

What can now be said about radio? A quarter of a century ago, as Jerry Booth and I wrote, it “lack[ed] a language for critical reflection and analysis” (Lewis and Booth 1989, xiii), for “though words are what radio uses above all else, it is as if there are no words to describe what radio is about” (Lewis 2000, 164). The contributions to this book, demonstrating indeed diversity and innovation, illustrate the opening up of the discursive space which radio now enjoys, supported by the infrastructure any academic subject requires—conferences, book publication, journals—with ECREA’s Radio Research Section entering the field to join the *Journal of Radio Studies* and *The Radio Journal*, membership associations.

Where is all this going? A number of the contributions to this book discuss a future that is already with us. The individual selection of recorded music conveyed through headphones might suggest that radio was only a transitional means of disseminating and sharing aural culture, yet the spoken word lives on. True, many of us find it a struggle to get our students to open their ears to the acoustic space around them, but podcasts like *S-Town* and its predecessor, *The Serial*, attract massive audiences, while the Radio Garden seems to offer the same pleasure in sharing live broadcasts with family and friends across the globe as was once made possible by those museum pieces in my living room.

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CHAPTER ONE

CHALLENGES FOR RADIO IN THE DIGITAL ERA: DIVERSITY, INNOVATION AND POLICIES¹

MANUEL FERNÁNDEZ-SANDE AND
J. IGNACIO GALLEGO

This chapter provides an overview of the three concepts cross-cutting this work. This is a collective work aimed at presenting a series of works from around the world to review some of the current trends in radio research. We broach broad concepts that help to establish drifts towards various levels but which ultimately all have something in common: they look at how academia seeks to systematise the changes taking place in radio in its adaptation to the digital era. Diversity, innovation and public policy are used to frame the different chapters of the book, which seeks to provide a snapshot of trends in current radio research.

1. The Logic of Diversity and Radio in the Digital Era

The question of diversity in and of the media has become a set of problems increasingly addressed by international agencies, governments and academics from around the world (Albornoz and García Leiva 2017, 15). If we apply the logic of diversity to radio, we find a variety of approaches which can start with the definition of the concept we work with in our research group, Diversity of the Audio-Visual Industry in the Digital Era.

¹ This work is based on research undertaken for the project ‘Diversity of the Audiovisual Industry in the Digital Age’ [CSO2014 52354R], diversidadaudiovisual.org, supported by the Spanish Ministry of Economy and Competitiveness within the National RDI Program Aimed at the Challenges of Society

The diversity of an audio-visual system depends on a multiplicity of factors. To evaluate it, it should at the very least be taken into consideration that:

- Capacity for production, distribution and exhibition/broadcast of audio-visual content should not be concentrated in the hands of a small number of agents and that these agents should exemplify different types of ownership, size and geographical origin.
- Audio-visual content exhibits differences of variety, balance and disparity in terms of values, identity and aesthetics. These should reflect the multiple groups co-existing in a given society and should reflect foreign cultures.
- Citizens can access and choose from a wide range of audio-visual content and even be able to create and broadcast them.
(diversidadaudiovisual.org 2017)

Consequently, when we talk of evaluating the diversity of radio in the digital era, we should look to the property of producers, intermediaries and broadcasters. We are talking about a sector where there has been a global tendency towards concentration, with major actors dominating the market. This dominance is concentrated primarily in private media, with public radio in Europe, for example, accounting for 37.7% of the market of audiences (EBU 2016, 7). This figure is significant, as it is on the European continent that public service radio has developed most conspicuously. Radio as a medium has also been marked historically by a high degree of vertical integration. The broadcaster pre-produces, produces, programmes and broadcasts from the same institution/company. There is no national/global content market, nor are there any programmers who—with the odd exception—build their programme schedule on content produced by others. These logics decisively mark the impact in the global aggregators, in which they are generally positioned as leaders of the content coming from “traditional” radio stations. In countries with significant channel development (such as Spain and the United States) we do find a certain diversity in the ownership of broadcasting licenses, but most of these radio companies go about their activities based on the schedules developed by the major broadcasters; the number of independent broadcasters is truly small.

Following on from Hertzian logic, due to its oral nature radio—unlike television—is a highly local medium closely bound up with a country’s culture. Radio distributes a product that is difficult to export; unlike television, we cannot dub, we cannot subtitle (although there are exceptions, with subtitled sound products on audiovisual platforms), and there is not even an international market for the radio medium. The established logic of the medium therefore makes the development of

platforms like Netflix or Amazon, which produce and distribute content at a global level, virtually impossible. Transnational actors therefore focus on the task of aggregation and dissemination and try to monopolise content to make audiences profitable through data and advertising. Here we come across aggregators like Tune In, platforms like SoundCloud or more music-oriented services like Deezer or Spotify, which are starting to take an interest in other audio and podcast content that will lend them exclusivity and give an added service to their customers.

Quite different is the case of music radio, where the main content has been supplied by various record companies. In Spain, for example, there is high concentration in this area due to the predominance of the private music radio formula, which primarily broadcasts music from the big three transnational record companies (Universal, Sony and Warner). These companies supplied 96% of the top-50 songs broadcast in 2016 in Spain, according to the annual report from Promusicae (2016).

Where content diversity is concerned, digitisation clearly offers a wide range of audio content. Internet radio and audio content has indeed led to greater diversity: in terms of the development of independent producers, the emergence of new formats and narratives and the number of radio services on offer has grown. If we look at some of the other variables defined by Napoli (1999), however, we can see that the concentration is predominantly in demand, consumption, advertising revenues and even ownership of the main Internet platforms. As with the other cultural industries, traditional actors seek to replicate the same economic logics they have always applied when operating in their markets. In Spain, the PRISA Group recently presented its podcast platform, *Podium*, through which it is trying to achieve domination of Spanish-language podcast distribution and to accrue business with the production and distribution of quality audio content. For their part, the emerging agents are seeking to gain a competitive edge by using tactics and strategies that often draw on earlier business models.

The reality is that achieving visibility amid the mass of web-based audio content is becoming extremely complex, with a significant trend towards audience concentration. Large corporations have a significant competitive edge (budgets, hiring stars) that allows them to operate far more robustly within the logic of the algorithm. The tendency to develop and expand radio to platforms like YouTube or Facebook makes the importance of stars and these multimedia corporations' synergies with other media increasingly important. In parallel, we are faced with the emergence of new forms of production and distribution based on financing options like crowdfunding (Fernández-Sande and Gallego 2015), which

enable the development of spaces specifically targeting niches that in some cases form significant global audiences that make them sustainable.

2. Reflections on Innovation in the Radio Industry

Over the last 20 years the production, distribution and consumption of radio products have seen a transformation that is still ongoing. If we compare them with audiovisual content or with the online press, the process of change in radio has been far less disruptive, although it is clearly impossible to retain our previous understanding of the cycle of content broadcasting and distribution.

For more than a decade we have been reading in scientific literature various assumptions about an imminent change in the radio industry: different authors have spoken of radiomorphosis, radio 2.0, radio 3.0, post-radio, hybrid radio and so on. For the time being, however, the reality we can observe in our countries is not in step with the predictions coming from academia. Many of these views have limited themselves to extrapolating models and concepts arising in the transformations of other cultural industries to radio without taking into account the sector's characteristics and specificities. There is no doubt that radio is immersed in a process of change, but this is far slower than expected and involves an incremental change, judging by the concepts of incremental and disruptive innovation (Christensen 1997). There are various critical factors affecting this slowdown.

As has happened in the past with the written press, rather than facilitate the transition to the new environment, the radio industry has tried to cling on to old business models, and this has led to a significant loss of opportunities. Generally speaking, business strategies that have limited themselves to trying to maintain the results of exploitation and competitive advantages arising from concentration have so far predominated, rather than the industry opting for innovation strategies to explore new pathways of production, broadcasting and marketing made possible by the digital environment.

If it does not systematically introduce innovation into all its business processes, radio will continue to fail to keep up with the changes required by audiences' new habits of consumption of information and entertainment content, nor will it be able to generate the value required by its advertisers.

If it does not wish to lose market share in the digital ecosystem, the radio industry will have to undertake a thorough review of its model in the coming years; yet, faced with the uncertainty entailed by the process of

change in the sector, radio companies' strategies are characterised by their conservative stance (Martí et al. 2015).

Implanting a culture of innovation in radio companies will be no simple process, as their business strategies are still focused on trying to maintain their position in the traditional market. The sector's inertia is not helpful when it comes to differentiating strategies aimed at making the most of the opportunities presented by the new digital market. On the contrary, in the past few years the sector has shown a tremendous reluctance to adopt any radical change, as evidenced by the partial or total lack of political will since the 1990s to address digitisation and the inability of public institutions to draw up a feasible timetable for the implementation of Digital Audio Broadcasting (DAB).

Both the technological context and the media context have evolved at far higher speeds than radio; the radio industry has still not managed to adapt to the needs of today's society (Soengas 2013). While the sector has indeed started a process of change in recent years, it still clings on to its more traditional features in terms of structure, programming, audience and funding (Bonet 2017).

Traditional radio stations (the main channels continue to amass most of their audiences through this medium), other radio stations and other independent producers that only broadcast their contents over the Internet, new platforms that become radio content prescribers and/or producers, and various automated background music services, all co-exist on the Internet. It is a market with far lower entry barriers, in which the geographical bounds of analogue broadcast licensing have also been broken. Radio distributed via the web has allowed both live and deferred broadcast options to multiply (Martínez-Costa, Moreno and Amoedo 2015). The new Internet radio industry is far more complex than analogue: elements from local markets (determined by language barriers) interact with new global market logics.

Faced with the radio industry's passivity, new producers of audio content have emerged on the Internet—podcasters, online radios, audio content, aggregators, independent producers, etc.—and initiated processes of renewal in terms of formats, narratives, organisational practices, marketing, broadcasting formats or collaborative production. We can see how these processes, initiated in the environment of independent producers, some of whom we may consider disruptive, are starting to be incorporated by traditional radio companies in an attempt to modernise their content and to experiment in developing new lines of business. These new agents play an important role as accelerators of change, since their

innovations, once tried and tested on the Internet, are then adopted by traditional media in order to rebuild their markets (Campos 2015).

Innovation, which in economic terms involves an increase in competitiveness (Schumpeter 1943; Porter 1991), is always bound up with knowledge and research. Any innovation business strategy is the result of a systematic process aimed at improving the efficiency of its processes and at making the most of all the opportunities presented by the market. Very often the technological evolution of radio has been interpreted as a determining factor in innovation, but its evolution over the past few decades shows us this has not always been so. Certain technological advances directly impacting radio production or broadcasting have not involved deep processes of innovation in the sector. Innovation is a transverse process cutting across all of a company's functional areas and is also the result of various interacting endogenous and exogenous factors.

It is a complex matter to estimate the consequences that the accumulated delay of radio companies has had on the digital stage in terms of their ability to instil in their organisations a genuine innovation culture. All too often self-indulgent, the line of argument regarding the historical elasticity demonstrated by the medium in adapting to any social, economic and technological change since the 1920s has probably not helped its managers to perceive the scale of the paradigm shift required if they want radio to retain market share and social function in the new environment.

The radio industry requires far more proactive management that will bet on introducing innovation in all its dimensions:

- *Innovation of Product*: an in-depth review of schedules, formats, narratives, listener interactions and content generation processes to adapt to audiences' new listening and consumption habits should not be delayed.
- *Innovation of Processes*: progress must be made in developing new knowledge management models to ensure these companies' continuous learning, and all their operational processes must be reviewed to try to increase their efficiency; "big data" analysis techniques must be introduced to improve decision-making processes in all functional areas.
- *Innovation of Organisation*: in recent years many radio companies have already faced up to organisational restructuring to adapt to the new reality of their markets—the editorial staffs of the main radio stations have been transformed and room has been made for new professional profiles; still, there is a need to deepen and expand these processes in order to achieve best business practices and new

working methods, to generate new management and leadership systems, and to explore alternative funding systems.

- *Innovation of Marketing*: the development of new sales channels, market-niche research, the development of new advertising products, comprehensive radio brand management, design of more competitive business models and innovation in audience measurement methodologies (requiring joint efforts by the sector).
- *Technological Innovation*: starting with the development of all the functionalities of the new online broadcast systems, radio apps, social networks, platforms, etc.

The development of an innovation culture that will foster the changes needed in the sector requires the major radio companies, public and private, to assume a greater commitment to research. Radio companies have no departments or units intensively engaged in research; almost all breakthroughs in innovation are generated simultaneously with home-grown production and management processes. In the absence of internal resources, when new programming or formats are needed, they very often have to resort to specialist consultants.

The experiences of “Labs” (laboratories promoted by news companies to promote innovation) linked to radio companies are almost non-existent; most of these initiatives are backed by television corporations and, to a lesser extent, newspapers (Salaverria 2015). These laboratories are interesting experiences designed to detect and exploit the opportunities present in the market in order to obtain a new competitive edge. The radio industry is at present a stranger to these trends, nor does it develop programmes in partnership with universities or specialist research groups.

Incapable of achieving innovation dynamics, the sector should not undervalue the efforts and progress made by the radio industry and its professionals in recent years to generate hybrid formats, develop apps, interact through social networks and so on. They all constitute important steps in a process currently a long way from bringing any true conceptual innovation to the medium.

3. Public Policy: Global Challenges for Radio

Radio’s traditional role and pathways of distribution have altered so much over the past two decades that previously-established political logics are being radically transformed. For member states and supranational institutions, the current scenario of technological and cultural convergence poses a complex challenge in tackling change at two different levels.

At the technological level the current picture is marked by the debate in Europe surrounding the digitisation of signals based on different standards, such as DAB+ or Digital Radio Mondiale (DRM), with wave radio being perceived as an oasis in the digital landscape (Fernández Quijada 2016, 171). In the last few years this has been reactivated, with positions ranging from scepticism at the impetus in Latin America (Valencia 2008) to the different European Broadcasting Union (EBU) reports (2016, 2017), which seem to be trying to promote digital logic in cases like Norway—which, with its FM black-out (WorldDAB 2017; *Guardian* 2017), stands as a model to be followed by other European states. At the centre of the debate are three positions: firstly, a conservative stance that defends analogue broadcasting; secondly, the reactivation of the transition to digital wave broadcasting; and finally, more of a break-away stance advocating the transition from radio broadcasting to mobile broadband. The latter position has been called into question over issues surrounding access, cost or privacy, in reports by Teracom (2013) and others, although given the influence of telecom operators at global level, attention will have to be paid to the evolution of usage and policies on airwaves devoted to wave broadcasting.

At the level of content there is not much room for policy-making, but in principle the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2010) enables and encourages the development of specific policies aimed at promoting the diversity of radio content. Above and beyond logics promoting the implementation of community radios and which have seen some headway in recent years in certain countries (Uruguay, Ireland, Argentina or the United Kingdom), different states have tended to think about public media in terms of encouraging the production of local content and accommodating audio content from other latitudes. The questioning of these media and their locomotive ability, marked as it is by neo-liberal bias (Bustamante 2009, 91), and the lack of openness of radio as a medium to the new forms of digital production and distribution have limited these developments. It is worth underscoring the efforts being made by certain states. In Argentina, for example, through its scheme of audiovisual centres the country has sought to decentralise digital television production (Albornoz and Cañedo 2016) with a programme that might serve as an inspiration for the development of audio production bearing the hallmark of the logic of diversity. Canada's well-known policies for the promotion of musical and radio diversity aside (Sutherland 2012), we would like to stress the potential offered by digital networks in creating new forms of distribution driven by media belonging to public networks. In this regard, the US's

Public Radio Exchange (PRX) programme stands as an excellent initiative seeking to promote the diversity of contents in the public radio network by boosting independent creation and sustainability.

Finally, at a level relating content and technology, there is the major challenge of maintaining and developing radio audiences in the digital arena. The major public and private radio companies are seeking to develop young audiences, which are falling continuously in terms of radio content listening times (EBU 2016). In this respect the development of new formulas based on complementary audiovisual content or “pop-up” radios (BBC.co.uk 2016), which are attempting to attract new audience niches to digital wave radio, stand as the major initiatives. For public institutions the challenge is how to establish formulas that bring access and visibility to citizen media in the long queue of digital content where the trend is towards invisibility.

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SECTION I

DIVERSITY

CHAPTER TWO

COMMUNITY RADIO AS A SOCIAL LEARNING INSTRUMENT FOR SOCIAL EMPOWERMENT AND COMMUNITY BUILDING: AN ANALYSIS OF YOUTH PARTICIPATION IN THE SPANISH THIRD MEDIA SECTOR

ISABEL LEMA-BLANCO

1. Introduction

1.1 Community media, instruments for social empowerment and democratisation

Using radio as the voice of the voiceless is the historical philosophy of community radio, becoming the mouthpiece of oppressed people (on either racial, gender or class grounds) and generally a tool for development (Fraser and Restrepo 2012). Community radio—also known as cooperative radio, participatory radio, free radio, alternative radio, popular radio or educational radio—has been defined as having three essential features: being non-profit-making, community ownership and control, and community participation. According to the World Association of Community Radio Broadcasters (AMARC) (2010), community media are private media actors that fulfil social aims, embodying four characteristics: ownership by the (geographic or stakeholder) community they serve; being social-aimed and non-profit-making; management by the community with no public or private, political or commercial external interference; and their programming should reflect the goals of the community. They are independent and non-governmental media that do not do religious proselytizing, nor are they owned or controlled by or linked to political parties or commercial businesses (Manyozo 2011).

The Third Media Sector is characterised, above all, by *being open to citizen participation, deepening ideals such as human rights, democracy and social change*. Such social and cultural purposes have been recognised by international organisations like the United Nations, the European Parliament and the Council of Europe. Such institutions highlight the fact that media pluralism and diversity of media content are essential for the functioning of a democratic society. In this sense, community-based media are effective instruments for ensuring the exercise of freedom of speech in all social sectors. Additionally, “this media work for the development of different sectors of a territorial, ethno-linguistic or other community, sharing their communities’ interests, challenges and concerns” (La Rue 2010, 11), becomes an effective means of strengthening cultural and linguistic diversity, social inclusion and local identity (European Parliament 2008) as well as fostering community engagement and democratic participation at local and regional level (Council of Europe 2009).

The community media sector is expected to become a suitable instrument for social development, community engagement and democratisation, which involves social participation, gaining certain competences, and implies “agency in bringing about consequences and producing specific effects at local, societal or global levels” (Scott 2001, in Manyozo 2011). In practice, community media often faces obstacles in the form of low journalistic standards, weak technical skills, lack of financial resources, and fragmented legal frameworks (McCloughlin and Scott 2010). As Mario Kaplún posits, the mentioned process of media democratisation has two prerequisites: firstly, citizens’ media literacy, in which “popular sectors should be able to deliver messages and operate in media, to handle, understand and dominate media”, which necessary involves, secondly, a process of demystification of the media (Kaplún 1983, 43), “revealing underlying truths normally hidden from our view” (Buckingham and Sefton-Green 2005, 125). In community media, the traditional object of social education (people) becomes an active agent subject to its own destiny, according to its ability to generate language, knowledge and action (Barranquero and Sáez-Baeza 2012).

Kaplún and Latin American edu-communicators were highly influenced by the work of the pedagogue Paulo Freire, as European colleagues were by Antonio Gramsci (Barranquero and Sáez-Baeza 2012). Freire’s free pedagogy, associated with the construction of political consciousness as a result of educational processes, remains today one of the pillars of Latin American community radio when designing their educational proposals, understood as tools for citizen empowerment and