About Pandora and other streaming music services: The new active consumer on radio

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Abstract

For decades, radio and music have had a perfect wedding. Now the digitalization created alternatives that also transformed the role of the consumer, from passive to active one; streaming music channels let you choose when you want to listen and even what music to hear. In this paper we relate these new challenges with the responsiveness of the traditional radio.

Key words: Radio; Music; Young people; Internet, active consumption; Pandora

1. Music, young people and the radio

Music is, worldwide, the most dominant content on radio. In Portugal it represents between 70 and 80 per cent of the global listening, according to Meneses (2006: Introdução). These figures are similar to those of the United States («*the music radio is a phenomenon that at the end of the nineties affects more than 10 thousand broadcasters in the United States – 88 per cent of the total number of radio stations- and it embraces almost 74 per cent of the global radio audience*», Moreno, 1999:90), and even bigger are the ones in Spain or France. Nevertheless, one can say that this strong presence of music is very much the picture everywhere: « *the majority of stations in Britain follow a very similar format dominated by music*» (Fleming, 2002: 6). Moreno Moreno (2001:203) concludes that «*the musical specialisation is a more developed phenomenon in the United States but a more consolidated one in Europe when it comes to consider radio programming and audiences(...). The European radio stations have almost 30 per cent of the global audience of music radios, especially in Spain and France».*

On the other hand, music is a content that strongly relates to the youngsters, who are at the core of this analysis:«*music remains one of the seminal influences in the lives of young people, though we also discovered that less than one out of five teens admits that music impacts their thinking or behavior*» (Barna, 2001: 104); and for whom radio is a decisive source of information : «*91% of US seventh graders and some 96% of US ninth graders are guided by the music in their choice of radio stations. Even before unification, East German youth also selected the radio stations they wanted to listen to—often West German programmes—on the basis of the music that was played (Felber, 1991)*» (Boehnke *et al.*, 2002: 195);

Finally, music is probably the media product more affected by digital concurrence, but, at the same time, it is also the one that can get the biggest benefit of globalization, as predicted by Cordeiro (2007:82): «*the music industry has a global essence, that comes from the universal nature of its language, which reveals suitable even when the lyrics cannot be understood due to the barrier of language»;* on the same path, Wall (2004: 29) admits that «*the new technologies of the Internet, at first, seem to offer a space in which music radio can be made free of corporate interests, where innovation can take place, and therefore where variety can flourish for the public good*»;

2. The new reality of digitalized music

> «*it still exists a big demand for great cultural hits, but they are no longer the only pieces on the market. Nowadays, hits are in competition with a wide range of niche markets of variable size. And consumers are rewarding, more and more, those who offer more choices. The era of standardization is ending and something new is taking its place: a market of diversity*» (Anderson, 2007: 6).

One of the goals of this work is to try to characterize the music radio of the future, bearing in mind that, as the iPod, and in general the audio players, have shown, music is following a path towards complete dematerialization. Furthermore, there is a parallel reality that cannot be ignored: illegal downloads, freely exchanged over the internet with no respect whatsoever for the labels and the musician's legal rights.

Either legally or illegally, one can say that (almost) every music exists in a digital form. Radio, which used to be the less expensive (completely free, actually) and worldwide disseminated (because convenient) medium, faces now a strong competition from the consumers` interests point of view. Today, one can listen to any music he wants – legally or illegally- on several Internet services. On the radio, either you have the chance of asking the record you wish to listen, or you will have no alternative but to wait for the DJ to play it. And, as we know, there is a lot of music that never gets the chance to be broadcast (bear in mind the frequent complaints about the lack of variety that results from very short and endlessly repeated play-lists). «*There was a time when radio was the only way to transform a record into a hit. No other medium reached so many people and with such frequency(...)but now radio seems to have caught the wave of a terminal decay*» (Anderson, 2007:103).

Nowadays, to be nº1 on MySpace seems to be more important than to reach the biggest airplay on any given radio station. Therefore, radio is loosing its role as a gatekeeper - as Neves describes it, quoting Lopes and Ciane (*apud* 1999:142). The explanation is simple: on MySpace there are no gatekeepers, each one places there whatever he wants, whenever he wants, and using whatever form pleases him the most (streaming or even download). Since that is the case, one can not be surprised when facing statements like «*in the absence of radio play, garage bands all across America are establishing a presence on MySpace*»[1]. And the truth is there are more and more frequent examples of bands that reach success after being discovered trough MySpace.

But it was not only from a consumer point of view that musical radio has become uninteresting (or, if you wish, less competitive). Record companies, with whom radio has established a tight relation over the last decades, have also found alternatives to promote music, to move forward with their marketing campaigns. Today, that result can be achieved directly on their own internet pages, on the artists` official or unofficial pages, or on sites such as MySpace or YouTube, or even, as it is becoming more frequent, associating those to other mediums, such as the newspapers.

Nevertheless, digitalisation is not only "good news" for the record labels. Counterfeit, and, as consequence, the inevitable fall of CD sales, is, without question, the biggest problem. Compared to that, the loss of control of the distribution channels is clearly the minor of their nightmares. This reality is the reason why we cannot be surprised with the title that was given to Forrester Research`s report: «*The End of the Music Industry As We Know It*»[2].

To summarize the previous thoughts: «*both the radio industry and record business have lost control of their delivery systems, they stumble back into dreaming up ways to get their piece of traditional music-related businesses and new ones that are struggling to get off the ground*»[3]. Regardless of the faults that can be pointed to radio, considering the time that it is taking to come in terms with the new digital reality, the truth is that the very same lack of response is being committed by the music industry. Besides, one cannot ignore the fact that it controls the very core of this business.

For some more years, radio will still be the biggest record player of the world, but record labels are now aware that they have alternatives to a monopoly that has lasted for decades. There is an all new scenario that questions «*the mutual dependency relation between cultural industries*», Cordeiro (2007:51). Probably radio will continue to be used, but under other dealing conditions and having to share the business with other digital competitors.

Finally, also musicians are no longer dependent on the promotion that was granted (bargained or paid) by radio stations. They can release their records on their own or, has it is becoming more and more usual, to just place independent songs on the Internet, defining the right timings, answering fans through their own channels, and hopping that the radio stations, because they need music, will join and follow the process.

[1] COHN, David, «Bands Embrace Social Networking», Wired, 18/05/05 [http://www.wired.com/culture/lifestyle/news/2005/05/67545].
[2] «Report: Digital Music Will Pass CD Sales By 2012», Radio Ink, 20/02/08 [http://www.radioink.com/HeadlineEntry.asp?hid=141106&pt=todaysnews].
[3] COLLIANO, Jerry Del, «Radio & Vultures», Inside Music Media, 04/03/08 [http://insidemusicmedia.blogspot.com/2008/03/radio-vultures.html].

Although it goes beyond the scope of this work, it is possible to conclude that musicians are now less dependent of labels, namely the so called majors, that exist and work in oligopoly**,** as it is characterized by Neves (1999:159) using data like this «*in Portugal, in 1997, 83,5% of the total invoicing was shared by only six companies, of whom only one was Portuguese, even if the position of the independent labels has become stronger».* The news about Last.Fm starting to pay copyrights to musicians who have no bound with the record labels is just a sign of the new times.

In this necessarily brief characterization of the changing that took place in the last few years- and will still go on- , it becomes clear that radio has lost is role of leading figure in promoting music. It is no longer necessary to listen to radio in order to get musical variety. Even the last argument, that radio is the best source of information regarding new music, seems to be losing ground, due to digital alternatives, and also as a consequence of the new reality of social networks**:** «*young consumers don't have that need that we older folks have to have someone knowledgeable about the music tell them what's new. They have their social network to tell them what's cool*»[4]. Nevertheless, and according to several sources, radio still reigns on this matter. What did not change – on the contrary, as some figures seem to indicate- is the consumers' interest in music. «*Music has not become unfashionable, on the contrary. Times were never so favourable to an artist or a fan»* (Anderson, 2007:38). Music free of any charge is not synonymous of illegality. The media are developing models which are based in advertising. Still, the five million downloads sold in five years by iTunes Music Store surely means something. At the same time, CD sales keep on falling. The music interest on the Internet is unarguable and it will tend to grow as soon as labels adopt a new attitude towards the digital scenario. Apprehensive at the beginning, and incapable of understanding that the future of promoting music lays on that ground, labels are now giving the first signs of cooperation. As Anderson (2007:103) puts it:«*labels know that the answer lays on the Internet (...)but they still are trying to figure out the best way to do it».* An example of this are the DRM restrictions that are imposed by the iTunes store, which result in a loss of portability and convergence, but that are not applied to other providers, like Amazon, Napster, Walmart or e-Music. This happens as a result of the effort that is being made by the labels in order to reduce iTunes dominant position in the market, which is around 80% of the global market.

[4] FISHER, Marc, «Name That Tune-In: Who Will Emerge as The Future of Radio?», Washington Post, 23/03/08 [http://www.washingtonpost.com/wp-dyn/content/article/2008/03/21/AR2008032101038.html?hpid=sec-tech].

3. The new "on demand" music services: uses of active consumer, and the quest for a different business model

Reflecting on the existence of new active consumers is not a mere exercise of checking theoretic possibilities. Until some years ago we could do it, but today there are already some services that prove this possibility. They are those that provide music on demand, and, in most cases, they allow us to listen to the music we want and whenever we decide to- further on, we will check the existing limits. These services have shown that the active consumption is possible. But, more important, they made clear that the threats to radio caused by digitalisation did not end with the iPod. This one carries the music we decided to download; as for the music on demand services we have «all» the music, with a special underline to the one we do not know (new artists, independent or not, and less known recordings by famous performers), side by side with the commercial hits.

These services have two decisive and associative characteristics: they are free (a little advertising is enough to support them) and they strongly appeal the consumer to participate – in many cases, he can personalize his choices, creating and updating his own play-lists. But, due to the fact they are recent, these services are still finding out the multiple paths they may take, especially regarding their viability. This point reflects the several lines of investigation, taking, as a starting point, Pandora, which is one of the oldest and also one of the most pioneering among these services.

3.1 The revolution started by the Pandora service (the musical recommendation)

The Pandora project was born in 2000, created by the former musician Tim Westergren. Pandora was not the first to see day light and is not even the most popular among all those that can be classified as «live streaming services»- as we will see there is no consensual denomination, therefore, in this context we will adopt the designation «streaming channels», following the example of Albarran *et al.* (2007:100) «*we use the term "streaming" to represent listening to music through a live stream on the Internet as well as to represent Internet or online-only radio stations. Therefore, the term streaming covers listening to music via the Internet regardless of the source»*. In this context the term marks the opposition to «download». While in download we listen to what became ours, in «streaming» we listen, but we do not own the music. There are also those, like Meditsch (2001: 4) who talk about «online jukeboxes», which makes some sense since we are in the presence of a new jukebox version. In the past, we could put a coin and listen to our favourite music, now «*by using bits, we do the same thing that analogical paths provided before(...) that music selection recorded in audio tapes, that fuelled teenagers dreams and anguishes, was it not, in a way, some sort of a radio station?*» (Salomão, 2006:4). There are also those who suggest the designation «on-demand music service».

If Pandora is not the first (though one of the oldest running) and not the most used of all internet music services, what is it that justifies its distinction from the others?

There are some features that we find very interesting to guide us in this particular part of the reflection we are carrying:

- It presents itself as «Pandora radio; listen to free Internet radio»;
- It has created a recommendation system of its own, designated as «music genome project», that has been praised and made it quite notorious;
- It is one hundred per cent legal, it pays copyright and therefore it is only available in the United States (even if, and that proves its importance, there are alternative ways to receive the service in the rest of the world- we used them in order to write this study). «*We operate in the U.S. under a statutory law, and that is not available in any other country. So no other country has actually put that one-stop licensing in place. So as soon as they do that, we are going to be able to jump right in, hopefully this year*»[5];

- It has a free version, with advertising, and the «premium» one, which is paid (with fewer restrictions;

- It allows consumers to create what is called personal «radio stations» (as we will see, they are not really play-lists);

Basically and generically, these services provided through streaming are characterized for, at different levels, allowing free of charge:

- choosing music or a band;
- rejecting music or a band;
- building a play-list with music chosen by the consumers;
- building profiles from a simple login (some services do not even require this step)

Having millions of songs available is perfect when we want to listen to the music we're already familiar with, but let's face it: no one wants to always listen to the same music. On the other hand, if radio is the main information source on new music, that happens because we all want to discover new material from artists or genres, indulging ourselves in pure discovery.

On the radio there is someone (the gatekeeper, who can define the play-list or be the author of a show) who offers us that new music; he does all the work for us. He is the one who makes the synthesis from millions of choices that, at least theoretically, are available.

[5] HEAD, Daniel, «Founder of Pandora talks about future of online radio business», The Daily Northwestern, 05/06/08 [http://media.www.dailynorthwestern.com/media/storage/paper853/news/2008/05/06/Campus/Founder.Of.Pandora.Talks.About.Future.Of.Online.Radio.Business-3365491-page2.shtml].

In the streaming channels, computer is the medium, therefore the joker would be, first of all, making available the biggest possible number of music, and, secondly, setting them in order, categorizing to have them available in the most clever and easy way to the consumers.

Pandora has distinguished itself exactly for that:

> «*every time a song arrives in this musical DNA shop, an analyst will devote twenty to thirty minutes of intense concentration to identifying as many as our hundred distinct variables, or "genes". Just to capture the emotional metrics of the singing voice, there are thirty-two variables: things like timbre, vibrato, pitch, and range. "Any voice can be understood as the combination of these genes", says Westergren. When this system is applied to all the instruments as well as the traits of the song - tempo, amplitude, etc. - the analyst produces a précis. If done right, says Westergren, another analyst can look at and virtually play the whole song in his or her head. More to the point, using this Music Genome Project, you can automate what a disk jockey does to customize a set according to your tastes*» (Levy, 2006: 252).

Before the «music genome project» and Pandora, music was set in order according to the genres that the label system attached musicians (namely, for the need to distribute music by the correspondent radio formats and, afterwards, on the sales boards, with special highlight given to Billboard): rock, pop, blues, reggae, world music, etc.

If this system of categorizing has always been the target of critics within the analogical regime (basically, the finger was pointed to its lack of flexibility and to the absence of quality patterns «*listeners have tastes, radio has genres*», says Ramsey[6]), its limitations became much more clear in the digital environment.

The industrial taxonomy leaves little space for surprise, for the unexpected, for what is not mainstream- the active consumers from the «iPod generation» want more than the mainstream (or, beyond mainstream). Comparing the most sold music in 2000 and 2007, it becomes clear the great difference between the analogical top and the digital one «*music sales are clearly trending toward greater diversity and choice. One possible reason is that across that seven-year period, online music stores have made it possible to search, browse, sample and purchase a far wider variety of music than consumers ever could in any physical store*»[7]. Concluding: the «tale» is longer, broader and wider.

Pandora has created a system that works well. In fact so well, that probably no one dared to copy it (Not only because of the investment that would be necessary, but also by the knowledge it would take). In

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[6] RAMSEY, Mark, «Radio's in the "scarcity" business», Hear2.0, 11/09/06 [http://www.hear2.com/2006/09/radios_in_the_s.html].

[7] PIZZI, Skip, «Toward an Embarrassment of Niches», RWOnline, 13/02/08 [http://www.rwonline.com/pages/s.0054/t.11226.html].

alternative, other systems of recommendation, equally or even more efficient, were developed, based on the recommendation model of Amazon online library «customers who bought this item also bought». «*Amazon.com's approach to book reviews is also indicative of a new gatekeeping without gates. Amazon.com seems further instructive of how a digital future might operate along the lines of McLuhan's "everyone a publisher"*», says Levinson (1999: 128).

Of all the models that allow access to music through streaming, the most interesting seems to be the one of Last.Fm, known as scroblling. Basically, it works following the advising pattern of Amazon, multiplied by millions of users. While «*Pandora's recommendations are based on the inherent qualities of the music. Give Pandora an artist or song, and it will find similar music in terms of melody, harmony, lyrics, orchestration, vocal character and so on. (...) Last.fm is a social recommender. It knows little about songs' inherent qualities. It just assumes that if you and a group of other people enjoy many of the same artists, you will probably enjoy other artists popular with that group. Like Last.fm, most music-discovery systems have been social recommenders*»[8].

Some more differences, noticed in 2008: «*Pandora's interface is easier to use and you don't have to download anything. It's best for people who don't have a lot of music saved on their computers and want to quickly and easily find something new. Last.fm is great if you have a huge digital-music collection or are a heavy iPod user. It does a better job connecting you with friends or people who share your taste in music. Only Last.fm lets you type in a song and listen to it instantly*»[9].

Recommendation, as the result of an unconscious and collective act, is joined, on Pandora, by the classification that each consumer gives to each music, by listening it more than one time or by not repeating it.

Also on this matter, Pandora`s thumbs up and thumbs down were pioneers, since it has a direct and immediate influence in consumption trends, granting the customer the power, the power of controlling. This is what Scmiddt referred to as «matchmaking» (*apud* Levinson, 1999:129).

Without surprise, we may conclude that «*services that allow users to customize their channels generate large, loyal audiences*»[10] and that «*as popular online services such as LAUNCHcast and Pandora demonstrate, the online audio consumer is looking for programming that realizes the possibilities offered by the Internet for personalized, customizable content*» (*idem*, 29). At this point, we go back to Eco to remember that what really is at stake is, finally, the control of reception: « *reception is the moment of the communicative process that clearly determinates the influence of the messages: Umberto Eco has warned*

[8] KRAUSE, Steve, «Pandora and Last.fm: Nature vs. Nurture in Music Recommenders», SteveKrause:blog, 30/01/06 [http://www.stevekrause.org/steve_krause_blog/2006/01/pandora_and_las.html].
[9] HOROWITZ, Etan, «Internet radio services help you discover new artists», Orlando Sentinel, 23/02/08 [http://www.orlandosentinel.com/technology/orl-horowitz2308feb23,0,3605742.column].
[10] «The radio futures study» (2008), RadioNext (pág. 22).

us, long ago, that, even if we control the emission, we will achieve nothing until we control the reception» (*apud* Sanchéz Noriega, 1997:140). On the same path Wolton (2000:79) says that the fact of « *new technologies satisfy the need to act. It`s the "do it yourself" philosophy that it`s present on all the aspects of practical life*».

In short: «*digital technology is creating an iPod generation who see radio, and content, as something they can create and control themselves and is fuelling a wildfire global network of niche, net-based 'radio' channels*» (Shaw, 2005: 2).

3.1.1 Final notes: searching for a categorization

Especially (but not only) because of novelty, a characterization of these channels of streaming does not seem an easy task. Even so, here are some ideas that are worth keeping:

- there is no reference service, one that clearly dominates the market; on the contrary, each week we witness the coming on sight of new operators: «*by our count there are close to 150 music subscription and download services offering a wide range of digital delivery methods including on-demand streaming, CD burning, time and/or location limited (tethered) downloads, unrestricted downloads, and a variety of interactive radio options*»[11]; Pandora, as the reasons we mentioned demonstrate, marked a certain moment, but, in the last few years, new services much more interactive (as we will see on the next point), or more dynamic in several levels, like Last.fm, have appeared. Will there be space for a clear leadership similar to the one of YouTube on video, Flickr on photo sharing or MySpace on social networks? And, will that leadership be conquered by buying the enterprises that exist today? Even so, and mainly because of its bet on the «DNA» of music (that basically matches one music with another, a result that was probably unexpected), Pandora is the object that deserves more passion from those who study this matters («*Pandora: Web Radio That Listens to You*»[12] is an example of how metonymy works with Pandora), and it is the one with whom all the others compare themselves.
- Remembering what has been written before, Pandora was not the first nor the most visited service, but it is the one that opened the box from which many more continue to emerge;
- It is uncertain how these services will survive, even more since there is not a clear commitment from the labels. Advertising is the main source of profits, but, along with a great competition for each slice of the "cake"- and even if it is growing-, there is still a another strategic problem: if publicity is only visual, how can these services assert themselves as essentially musical? The

[11] «3. Getting Paid For Your Music Online – Digital Music Rights», IODA, 2008? [http://www.iodalliance.com/guide_rights.php].
[12] FULLER, Brad, ««Pandora: Web Radio That Listens to You», O'Reilly Media, 17/08/06 [http://digitalmedia.oreilly.com/2006/08/17/inside-pandora-web-radio.html].

sound element – music- is not fit to be a primary content (that is why there is no audio`s YouTube), therefore, an effort is being made to introduce visual items- the history of the musicians, the songs lyrics, the video-clips (and Last.fm is leading it). By developing this way, will they stay (only) streaming channels? Will they become, in the middle term, uninteresting as a business? Some of the services, as the LAUNCHcast, already oblige consumers to regularly signalise its activity; others, like Last.fm identify the music at the bottom of the computer screen, when the service window is minimized. It will also be important to understand if radio`s publicity, that did not succeed on Pandora, will work on other services.

The market is always watching, each pioneering experience is absorbed by thousands of operators (or pre-operators), as it comes clear in these words by someone in charge of the Jango service: «*they can insert commercials into their playlists, which is fine as long as their competitors do the same. Or they can try to keep listeners glued to their websites, where they can be shown targeted ads that might seem less intrusive and tiresome than commercials*»[13]. In other words, if the competitors have done it, it will be wise for a service to keep consumers` eyes "glued" on it.

- It will also be interesting to observe if downloading will conquer space to streaming (or, on the contrary, if streaming will make the download disappear); if, in alternative, they will coexist like it happens now; and what relation will they establish with digital audio readers, especially with those of Apple; and, last but not least, what will be the role of the subscription business.

- Besides the increasing of visual contents, there are also tools that promote socialization, the possibility to create communities, of sharing tastes and recommendations. These channels of streaming are clearly becoming social gates, but how far will they go? «*its personal management autonomy is joined by the flexibility of a ultra-light technology that knows no limits but the imagination of those who created it*» (Toral e Murelaga, 2007: 63);

To close the subject, we propose a categorization of these services, based on the gathered information and on the observation of the market, as it has behaved so far (we only considered services that are legal and we tried a simple taxonomy):

(table nº 1)

Streaming channels categorization	
Streaming channels	Download
With «playlist»	with publicity
Without «playlist»	With subscription

[13] HEALEY, Jon, «How to get ahead in webcasting», Los Angeles Times, 21/03/08 [http://www.latimes.com/news/opinion/la-oew-healey21mar21,0,6861827.story].

3.2 Empiric-deductive observation of the new «on demand» services

We have decided to complete this work of investigation on the new active consumption reality adding an analysis on some of the services provided by the music «streaming» operators.

The goal is, through an empiric-deductive observation, to obtain a comparative study on the power that each of them gives to the consumer, acknowledging eventual differences and hierarchizing them, following the perspective of Saad Corrêa (2008:311), who found inspiration in Braga: «*empiric observation and openness towards analogy would be the elements on which an epistemological model for the study of new medias would be built*».

In short, and by taking this path, the purpose is to discover which are the more 'active' services.

Obviously, due to the fact mentioned before that there are 150 operators (summed at the time of this work), it would be impossible, in this context, to analyse all of them.

Therefore, we have established a criteria that we will explain afterwards. Even so, they would be more than the 12 services analysed, and that is why we choose to make a selection based on some subjectivity (for example, curiosity, external notoriety or diversity). As mentioned, there is not even a hierarchy, recognised by the industry or by independent observers that could guide us on this matter. For example, Wall (2004:35-38), on what must have been the first work about this subject, compares services on «simulcasting» and services that do not allow personalization with others that permit it. We think that is something that should not be done when the task is to estimate the possibilities of active consumption.

The following services were analysed (in alphabetic order): AccuTunes; Cotonete; Deezer; Finetune; Imeem; Jango; Last.fm; Launchcast; Musicovery; Pandora;

Playlist; We7.

11 of these 12 services offer music, for free and legally, through «streaming» transmission (one of them also provides it through downloads). The legal question is, once more, a bit dubious, since we are taking for granted what the service declares on the matter – that is why we include Project Playlist (we aim to understand if some legal «engineering» ends up giving some benefit to the consumer). Of these 12 services, there is only one, Pandora, who is not available in Portugal, therefore, we had to make use of an alternative system (building a «shadow» on our IP) to accede it.

On the Internet, the geographic origin of the projects is quite irrelevant- even if, as we saw, Last .fm seems to have some advantages over Pandora due to the fact that it is based in England- other criteria was to include projects with origin outside the United States, who, even so, are in majority. Therefore, we included, for instance, a Portuguese service (Cotonete), two of French origin (Deezer and Musicovery) and, besides Last.fm, another British one, the We7. Nevertheless, and we insist, once four major labels dominate the world market, local specificness becomes almost irrelevant. Still, on a local level, one of the criteria of analysis that we introduced was the inclusion of a Portuguese music (from a worldwide known band) among the four that have been chosen.

For these services, independent authors and, especially, unknown ones are very appealing - even more, if the tunes (still) do not pay rights or if the fees are minimum.

For musicians, this can also be an interesting possibility to move forward.

Still, and beyond any doubt, no service can conquer its territory without having access to the catalogues of at least two of the four major labels. Despite the millions of users, these services are still a niche and they can not survive offering «minority» music only.

The 12 services analysed do not have exactly the same musical offer (they do not have access to the same digital library, with millions of tunes), but it does not seem to be that access that makes the difference when it comes the time to chose, since the global offer looks very similar.

From the point of view of many consumers – the one that mostly matters to us s- what really is decisive is the ability to influence or not the final product.

We have tried to measure the consumer`s power using two criteria:

1) by asking for tunes («Haja o que houver», by Madredeus, «Round Midnight» by Thelonius Monk, «Feel», by Robbie Williams e «Walk on the wild side», by Lou Reed) that we tried to listen on each one of the services (the list is, of course, subjective but reaches different markets and targets);

2) by analysing 22 factors of utilization:

(table nº 2)

User criteria
Selecting a specific music?
Complete running time of the music?
Choosing the artist?
To pick up a genre?
Does the service suggest other tunes?
Is the suggestion made by affinity?
Is it possible to chose/skip a music?
Are the refusals unlimited?
Is it possible to pause and re-start?
Is it possible to repeat a music?
Is it possible to create your own play-list?
Is it possible to create an unlimited play-list ?
Is it easy do add music?
Is it easy to edit the play-list?
Is it possible to rate/classify tunes/groups?
Does the ratting influence the number of times a tune plays?
Is it possible to recommend music to other people?
Are the Play-lists embedded on other sites?
Does it allow to download?
Is there an associated social net?
Does it provide extra information on the musicians?
Is it possible to add personal choices ?

This evaluation grid (or simply a usability checklist) was established, on a personal observation perspective, due to the inexistence of works in this area that, directly on this matter, could help us, that could provide us any sort guidance.

The rare experiences done so far in the journalistic area use less criteria than we did[14].

Our aim, by the way, cannot be framed on «uses and gratifications», because we do not intend to analyse the user's satisfaction level. What we aim is, following the logic of the reception studies, to elaborate an exploratory analysis on the power given to the users/consumers by the services.

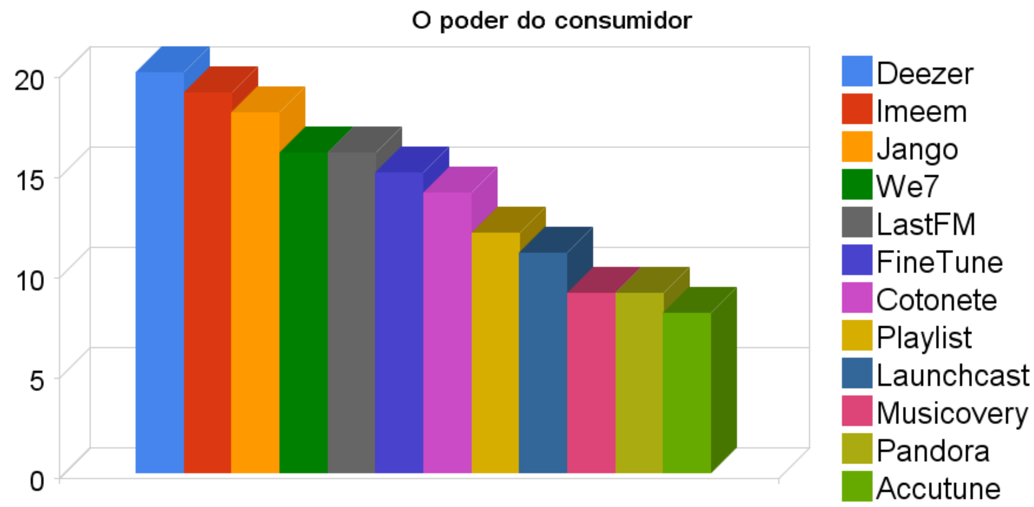
[14] Cfr. NICOLAS, Jacob, «Listen In Special Feature: Deezer Vs. Pandora, The Internet Radio Showdown», Listening.com, 05/05/08 [http://www.listeninmusic.com/2008/05/05/listen-in-special-feature-deezer-vs-pandora-the-internet-radio-showdown/]

We dedicated two straight hours of listening, on a daily basis, to each service, initiating the process with the login and trying, during that time, to answer the questionnaire.
We tried to do the observation in sequent days, but at the end it would not be relevant to the final result- unless some service was not available or in maintenance, which did not happen.
Anyway, and in order to avoid any doubts about the comparison, we did the work between April the eleventh and April the twenty nine of 2008.
In order to build the relative tables - and from the moment that it was decided that we would work with «yes or no» answers- we have established that each «yes» would represent one point (a «yes» means one more toll at the disposal of the active consumer).

3.2.1 Comparative results of the study

Regarding what we have designated as «consumer`s power» these are the obtained results:

(table nº 3)



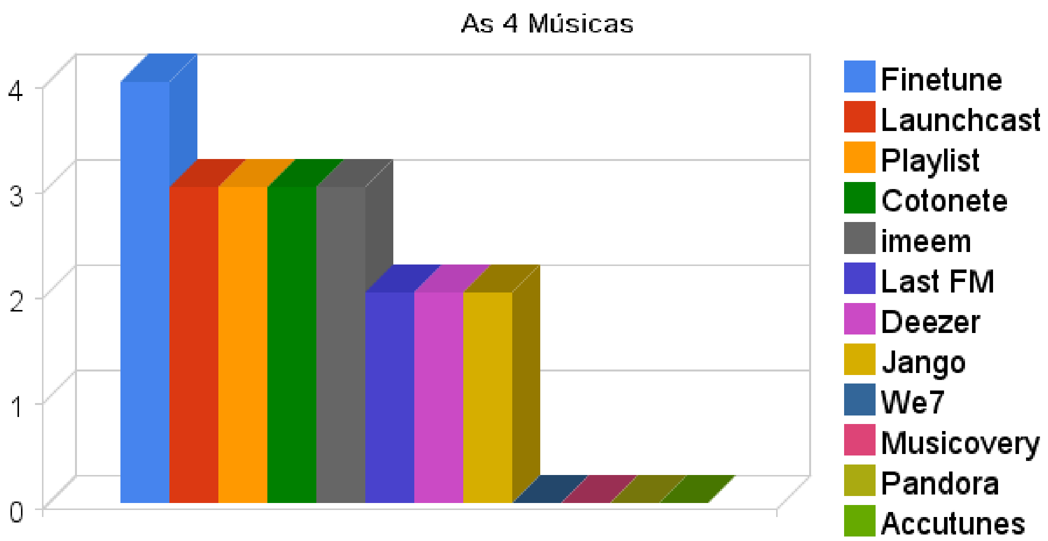
As we see, there is a great disparity between the services that give more and less power to the consumer, which already allow us to draw the following conclusions:
- there is a great offer diversity (the graphic shows a stair where the steps only repeat twice);
- there is a lack of consolidation on the level of the service offered (there is not even a general idea about «minimum service»);

- legal questions are not so decisive as one would think, in fact the service that provides more power is French, the following two are north-american (all of them, exception made to Cotonete, have «.com» as final address, and that indicates and gives relevance to their global strategy; Last.fm- that we remember is last.fm.com – also has a «.pt» address, and that shows a new stage of affirmation);

On the other hand, it is interesting to check that there are some services that come close to fulfil the maximum of criteria that we have established, and there is not a single criteria that is not fulfilled- that proves that impossible is nothing.

Regarding the four tunes criteria:

(table nº 4)

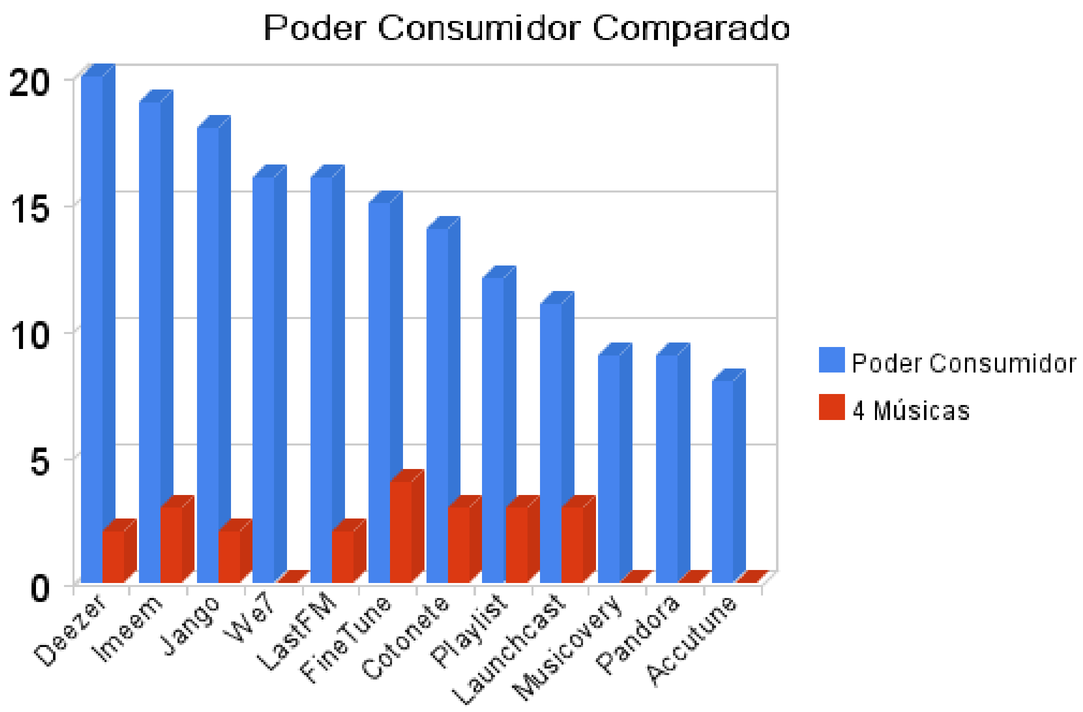


Only one service allows listening to the four tunes, and that is a relevant fact to what is the effective power of the consumers. Four of them allow listening to three tunes, and that is also significant, since one of them is Portuguese and may not be available on the online services catalogues (an individual reading shows that seven of these services do not have the song by Madredeus, but they have at least two of the others, which means that it was this specific tune what caused confusion in the final results; there is still a service, Deezer, which did not have this song, but makes available other tunes by Madredeus).

So, we can say that five of the twelve services can, or almost, completely fulfil the wishes of those who use them. The other seven are very feeble, especially the four ones where we cannot find any of the four chosen tunes, or the three – Musicovery, Pandora and Accutunes- where it is not possible to chose any specific music.

Curiously, these three services are also the ones that, on the previous board, give less power to the consumers, and that led us, by matching the two results, trying to find more common points:

(table nº 5) Consumer`s compared power



There are some conclusions that we can take from this final board:

- it is not possible to clearly declare what is the most active service, although, by the combination of the two boards, one can say that Imeem and Jango are better positioned. One thing is clear: Last.fm, who publicly claims itself as leading service, does not achieve a coherent result on that level;

- Pandora has played a revolutionary role, but it lost a lot of its aura in the last years, which is a consequence of the reasons that have been presented but also a result of the confrontation with new and more active services; it is fair to say that Pandora is right now one of the less active services (Pandora was one of the first to risk on creating playlists), but they were not really playlists, instead, they were a kind of «radio stations», with music that we could no chose, in fact, it only gave us the possibility to reject part of it;

- And since we are talking of radio, 9 of the 12 services make reference to it, either as part of simple designations such as «webradio» or «smart radio», or as a strategy, like in the case of Last.fm («Last.fm radio», «change station» or «my radio»);

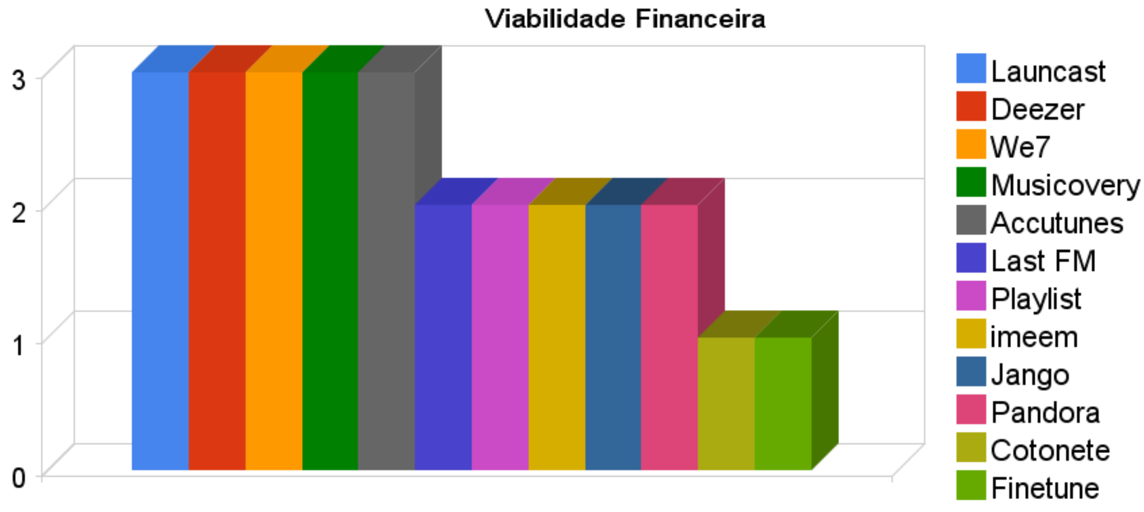
- The hypothesis on Project Playlist was not confirmed; from its dubious legal statute does not result a bigger activity;

- Cotonete, the Portuguese service, does not lose to the competition; besides allowing to listen to three of the four chosen tunes, it offers many services to the consumer, being one of them «*the inclusion of personal contents, a ´worldwide innovation` singularity, which is a commercial success; (… the service has introduced several solutions in the market and they were not limited to the traditional banner, instead, they embody video, audio and image*»[15].

Besides these elements, we also analysed the financial viability, with the purpose of understanding the commercial dynamic of the analysed services (and less the real viability of the business, which is a dimension beyond the scope of this work, due, if for nothing else, to the absence of independent data).

These are the results obtained:

(table nº 6)



[15] MORAIS, Maria João, «As novas faces da rádio», Meios & Publicidade, 23/05/08 [http://www.meiosepublicidade.pt/2008/05/23/as-novas-faces-da-radio/]

Only five services fulfil three of the six criteria, which means that there is a large space to improve the commercial results.

Other notes:

- There is no match between the services who give less power to consumers and the strongest commercial ones: if Finetune is the one who gives more power, it is also the one who less commercially explores its own service; on the other hand, a little active service such Musicovery proves to be one of the most commercially aggressive;

- It is not possible to establish a cause and effect relation between the seniority and the bigger commercial dimension of the services; Pandora is one of the oldest, but less «commercial»; We7 is one of the youngest but still one of the most aggressive;

- Visual publicity is the common factor present in all the 12 services and, in two of them, the only commercial platform; only two services include audio publicity (We7 and Accutunes);

- The fact that Cotonete, the portuguese service, is among those who less explore the several commercial possibilities is related with the dimension of the Portuguese digital market;

4. Final reflections on the future of music radio, from the experience of the active consumer

If the consumer wishes to passively receive a musical flow previously programmed he still has the ability of doing so (analogically in the short term, but, soon after, only on a digital frame). And that is radio. But the consumer who wants to be active, to make a move, has new opportunities. At this moment, and in many cases, he already can control when he listens.

Gradually, he will have the power to also chose what he listens, without being dependent of the synchronic flow (these are small steps that will give power to the consumer; if radios do not shut down their ears to what listeners want, they will make profit of the huge feedback capacities made available by the Internet).«*Any radio strategy that doesn't include listener participation and active input will fail*»[16].

Furthermore, the changes for the listener do not resume to the possibility of choosing when he listens and to influence what he listens. He can read the news, he can watch videos and photographs, he can comment on what he heard, he can vote, criticize, in a word, he can actually see the consequence of his actions.

[16] COLLIANO, Jerry Del, «Gen Y Consults Radio», Inside Music Media, 14/04/08 [http://insidemusicmedia.blogspot.com/2008/04/gen-y-consults-radio.html].

(table nº 7)

Differences between conventional radio and the streaming channels	
Conventional radio	«new medium»
Based on Hertz waves broadcast	Based on the Internet
Linear broadcast (not suitable for manipulation)	Choice, selection, personalization (play-lists)
Only sound	Sound, text, photographs, video; hyper-links
Word/speech is omnipresent	Based on music (no words/speech)
Broadcast for the masses	Broadcast for one; many broadcasts for one: one for many
Directors, Dj`s, journalists	«Producers-consumers» and computer
Reception with little or none convergence	Where there is Internet, there is convergence
Intrusive advertising	Possibility of reception without advertising
Small ground for interaction	High interaction

In order to achieve that result, one needs to eliminate the mistrust that characterizes the recent history of the relation between radio and Internet, so that, finally, they stop walking with their backs turned on each other towards the future. In other words, and once again inspired by McLuhan, may they stop looking by the rear view mirror to what already is the present. This mistrust is inevitable, but in this context, it can also be surpassed: «*as it would be predictable, the new paradigms cause disorganisation and confusion. Many times, they are received with coldness, or even worse, become the object of mockery and hostility. Installed interests fight the change. Yesterday leaders have great difficulty in accepting what is new*» (Tapscott 2008:ii).

But also the consumer needs to learn how to deal with the new reality, by abandoning the status of simple listener: « to move from broadcast towards interaction means two things: first, we have to learn how to conduct a dialogue, second, we have to learn how to communicate in a non-violent way, using forms that do not lead us to a fight» (Hamelink *apud* Cebrián Herreros, 2007: 60). Van Selm *et al.* (2006: 280) strengthen the idea - due to more active consumption- of mutual responsibilities: «*we do feel the use of interactive Internet tools has implications for both programmers and listeners*».

To leave the statute of mere listener also means that, what used to be listening only will turn out in something else: «*as listeners turn to radio for recommendations, resources and reflections of their city*»[17]. It means, for example, that listeners will lose the condition of total anonymity and embrace a strong relation. Nyre and Ala-Fossi (2008: 55-56) demonstrate that in the presence of an «*increased participation*

[17] SAXE, Frank, «NAB radio show special issue», Inside Radio, Setembro 07, pág. 6 [http://ftp.media.radcity.net/ZMST/NAB/IRNAB07.pdf].

among audiences and increased registration of their personal information by providers. (...) they have to choose either unregistered access or wide-ranging participation opportunities». And, by the way, to stop buying radios, and start to «*buy things that contain radios*»[18]. Nevertheless, it is in the hands of radio to make the first move: «*it is clear that for radio as a business to develop, it should recognize these fundamental changes in the lifestyles and expectations of the audience*» (Berry, 2006a: 149).

The future is possible. But it will not be free of problems - that will generate doubts and oppositions- confirming what said Fidler: «*there is no rising chronological line towards the absorption of the technology that came out of the laboratory. The path is more similar to a roller coaster, with several high peaks and falls. And nothing can assure that after a fall there will be a rise at the end of the line*» (*apud* Bianco, 2006: 8).

One final question: we would like, in this context, to mention one more time Brecht`s utopia of one radio that works in both ways, one that allows to receive but also to give. Could this be what Brecht had in mind? «*Can we make this two-way radio? Can I upload my stuff as well as download yours?*»[19]. More and more people believe that «*radio on the Internet allows the rebirth of some sleeping utopias such as interactive radio, alternative radio, tutor radio*» (Bufarah Junior, 2006: 7). Bear in mind that one of the characteristics that define digitalisation is that it allows a two-way communication. But, as we previously said and plead, that will no longer be radio. And the best example still is the podcasting: if before we have said that podcasting has marked the birth of a new radio, the CPA, it is also wise to remember that « *the characteristics of a podcasting are opposed to those of a traditional model of radio transmission (...) after all, if podcasting is not radio, then, what will it be?(...) a new media, a true multimedia, within the Internet. That is what we believe*» (Medeiros, 2006: 9-10). For Berry (2006a: 144) «*podcasting is* [the] *one that has already forced some in the radio business to reconsider some established practices and preconceptions about audiences, consumption, production and distribution*».

In the future, radio will necessarily be different from the actual model, which is starting to be different from the one that existed for almost a hundred years. Even so, will it still be called radio? «*if, all considered, we call it radio, it is surely because it is the product that mostly resembles it, anyway, it is possible that this feeling will last less than one decade*» (Pousa, 2006: 5421).

[18] RAMSEY, Mark, «You can't sell what folks don't buy», Hear2.0, 06/09/07 [http://www.hear2.com/2007/09/you-cant-sell-w.html].

[19] TIMPANE, John, «In radio, satellite is gaining ground», Philadelphia Inquirer, 05/03/06, em «Quatro interrogações sobre o futuro da rádio», O Segundo Choque, 10/03/06 [http://osegundochoque.blogia.com/2006/031004-quatro-interrogac-es-sobre-o-futuro-da-radio.php].

(table nº 8)

Some ideas on the future of radio	
Known facts	... and doubts
Listening, as a secondary/parallel activity, will be reduced	... at the expenses of new contents?
The consumer will take the place of the listener	... will he be prepared to this new statute and to the associated responsibilities(the loss of anonymity, for instance)?
Radio will continue to give up power	... until the point that it will let the consumer decide what he wants to listen (besides when he does it)?
Music radio will no longer be the same	... so how will it be?
There will be new contents	... will social networks and podcasts be the base of the consumption, developed from what radio is today?
Radio will remain a free service	... is the 30 seconds commercial spots model in danger?
Radio will have no boundries	... will it bet more in local or global contents?
Human criativity is irreplaceable	... will there be the need for a new language?
The new competition implicates a distribution of the media consumption time	... will radio be able of keeping a significant critical dimension?
It will be based on the internet	... will it still be radio?
Brecht is more up to date than ever	... is this what Brecht talked about?

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