The Rise of IP Radio and the Future of Broadcast Platforms

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1 Growth of Internet (IP) Radio Consumption

Internet-based radio listening has surged recently, driven by the proliferation of smartphones, smart speakers, and broadband connectivity. In the UK, online/IP radio consumption reached a record high in early 2025, accounting for about 28.5% of all radio listening – up from roughly 22% in 2022[1]. Notably, online listening overtook traditional AM/FM radio by share for the first time in 2024, marking an important industry milestone[2]. This growth is fuelled in part by smart speaker usage, which now contributes around 17–18% of total radio hours (up sharply from 0% in 2016)[3][4]. Listeners are increasingly tuning in via internet-connected devices – from mobile apps and web players to voice-activated speakers – instead of or in addition to terrestrial broadcast receivers[5].

Demographic and technological shifts underlie this trend. Younger audiences and those with high connectivity have gravitated to streaming audio and on-demand content, while even older listeners are gradually adopting digital platforms. By Q1 2024, an estimated 73% of all UK radio listening was on digital platforms (DAB, online, or TV), with only ~27% remaining on analogue AM/FM[6]. Within digital, internet streaming (online) now represents roughly one-quarter to one-third of listening hours[6][1]. This rapid rise of IP-based radio indicates that listening habits are evolving toward more personalized and convenient delivery methods, blurring the lines between "radio" and other forms of audio media.

2 What the Shift Represents: Industry and Public Commentary

Commentators in the media and radio industry have noted that this shift to IP delivery represents both opportunity and disruption. On one hand, it expands audience choice and content diversity. Broadcast executives point out that radio has "embraced innovation to keep radio strong and relevant" by making content available on connected devices, thus ensuring radio remains a vital part of daily life in a multi-platform environment[7]. Social media discussions and industry blogs often

frame the growth of internet radio as evidence that radio is adapting to the digital age rather than dying. For example, analyst James Cridland highlighted the new milestone of online listening surpassing analogue and put it in context: broadcast radio (especially DAB digital radio) still delivers the majority of listening, but the future will be multi-platform*[8][9]. In essence, radio is increasingly delivered via a mix of broadcast and broadband, and listeners enjoy the flexibility of accessing radio content live or on-demand, at home or on the go.

On the other hand, the shift represents a challenge to traditional business models and regulated markets. Radio industry groups note that the surge in online listening has led to audience fragmentation and greater competition for advertising spend, since listeners can as easily choose a global streaming music service or podcast as a local station[10]. Existing broadcasters accustomed to a protected market (with limited FM/DAB spectrum and licensing requirements) now find themselves competing on the open internet against countless new audio outlets. This has prompted calls for updated regulations: for instance, the UK's Digital Radio and Audio Review (2021) warned that tech platforms (smart speaker and app providers) might "leverage their market strength" by charging radio stations for carriage or inserting their advertisements[11].

Broadcasters and policymakers alike recognise that radio's value to audiences remains high, but its distribution channels and competitive landscape are changing fast. A parliamentary committee noted that radio's regulatory framework (largely unchanged since the 1990s) must adapt, given live radio's share of total audio listening fell from 75% in 2017 to 63% in 2022 amidst the rise of streaming services and smart speakers[4]. In public discourse, this shift is often framed as a balancing act: preserving radio's public service and local content benefits while embracing new platforms.

Community media advocates, in particular, see IP distribution as a double-edged sword – offering low barriers to entry for new voices, but also removing the inherent localness/protections that come with regulated spectrum. Overall, the rise of IP radio is portrayed in the news and on social channels as a transformative trend that represents radio's "third revolution" (after AM and FM): one that will demand innovation from broadcasters and responsiveness from regulators.

3 Challenges for Traditional Broadcast Platforms (AM/FM and DAB)

The growth of internet radio poses significant challenges to legacy broadcast platforms like AM, FM, and DAB digital radio. Audience erosion is a primary concern – as more listeners shift to online streaming, the share tuning in via AM/FM or even DAB is declining year by year[12]. In the UK, analogue radio (FM/AM) accounted for about 34% of listening in 2022, and closer to 27–28% by late 2024[6][13]. This decline in usage can create a feedback loop: broadcasters may invest less in analogue services, leading to lower quality or reduced content, which in turn can drive more listeners online.

A related challenge is cost efficiency and infrastructure maintenance. Broadcast radio entails high fixed costs – transmitters, antennas, and energy – which are economical for one-to-many distribution when large audiences are tuning in, but become less so as audiences shrink. For example, the power-hungry AM band is notoriously costly: carrying a national AM station in the UK can cost a "healthy six-figure sum" annually, and it's estimated that AM radio delivered only ~2% of UK listening hours but consumed ~35% of radio transmission electricity costs[14]. This imbalance has led many broadcasters to switch off AM transmitters recently to save money[15][14]. FM and DAB transmissions are more energy-efficient than AM, but running parallel analogue and digital networks still means duplication of expenses. The government's own review noted that operating dual analogue and digital systems is financially burdensome, and phasing out analogue could reduce costs in the long term[16]. Thus, as audiences drift to IP platforms that externalise distribution costs to consumers' internet connections, broadcasters face tough decisions about continuing to fund legacy broadcast infrastructure.

Another challenge is technology and coverage limitations on traditional platforms, which contrast with the ubiquity of internet connectivity. FM and AM continue to provide universal coverage and easy access but lack interactive capabilities and are limited in channel capacity. DAB digital radio offers more stations, but has its issues: Many UK DAB services use low audio bitrates (e.g. 24 kbps MP2 stereo) resulting in audio quality often inferior to FM for music[17]. DAB coverage can be patchy in some rural or indoor locations, and small-scale DAB multiplexes (meant to serve local areas) are engineered more for mobile/outdoor reception than deep indoor coverage[18]. Listeners have reported signal dropouts on DAB, which can frustrate audiences accustomed to the seamlessness of streaming (assuming good internet). In short, broadcast radio must contend with technical limita-

tions – signal quality, receiver compatibility (e.g. older DAB radios not supporting newer DAB+), and device power consumption – at a time when IP-based services continuously improve in quality and user experience[19].

Regulatory constraints further complicate the picture for legacy platforms. FM/AM radio spectrum is a regulated, finite resource – historically, incumbents have been protected from unlimited competition, which has resulted in slow innovation cycles. Obtaining a broadcast licence is far more involved than launching an online station. As the industry focuses on digital roll-out, regulators like Ofcom have issued few new analogue licences lately (virtually no significant analogue licensing since 2016 in the UK)[20]. This has arguably led to stagnation and under-use of analogue spectrum: when a station closes or relinquishes an AM/FM frequency, often no new entrant is allowed to take its place due to an expected "digital switchover" that keeps getting postponed[21].

The result is idle FM/AM frequencies (spectrum lying fallow) and lost opportunities for fresh content on those bands, as policy has been fixated on DAB expansion. Ironically, the "excruciatingly slow" roll-out of small-scale DAB multiplexes has left some communities without either an analogue or digital outlet, as they wait for a digital solution that has been years in coming. Ofcom's small-scale DAB program, while eventually promising hundreds of new local digital stations, took three years to get its first 64 multiplexes on air (115 licences had been awarded by late 2024, the majority simulcasts of existing services)[22][23] – during which time many potential community broadcasters simply had no access to any platform. In summary, traditional broadcast platforms are challenged by declining audience share, high fixed costs, technical constraints, and a regulatory transition period that has hampered agile development.

4 Mobile vs. Fixed-Point IP Listening Patterns

Internet radio consumption differs in important ways between mobile and fixed (at-home) contexts. The choice of devices for listening often depends on where the listener is: for instance, at home, smart speaker devices account for roughly 20–26% of radio listening, whereas across all locations they average about 18%[24]. Many people find it convenient to just ask their Amazon Echo or Google Nest to play a station when they're in the kitchen or living room, replacing the traditional kitchen radio. In contrast, at work or on the move, laptops and smartphones constitute a higher proportion

of listening (around 18% in those places vs. ~11% overall)[24]. This implies that when people are outside the home – commuting, in offices, or otherwise on the go – they are more likely to use a phone app, car interface, or computer to stream radio. Mobile listening over cellular networks enables radio on the move beyond the reach of local FM/DAB signals, but it comes with considerations like data usage, signal coverage, and battery drain. Users have noted that mobile data networks can occasionally drop out or buffer, meaning internet radio isn't yet as consistently reliable as FM/DAB for in-car reception or remote areas[25].

By contrast, fixed-point consumption (e.g. at home on Wi-Fi) usually offers stable broadband bandwidth. Home listeners leveraging Wi-Fi can stream stations at higher audio quality (even HD audio streams) without worrying about mobile data caps or coverage dead zones. This partly explains the surge in smart speaker usage at home – these devices stay plugged in and connected to unlimited broadband, making them a seamless replacement for an FM set. We also see differences in listening duration: someone tuning via a smart speaker or smart TV at home might leave a station playing for hours as background, whereas a smartphone listener might consume radio in shorter stints (between other app uses). Additionally, in-car listening remains a last bastion of broadcast: as of a few years ago, around one in four hours of live radio was listened to in vehicles, mostly via FM/DAB sets[26].

While newer cars support smartphone streaming (and some services like Apple CarPlay/Android Auto integrate internet radio apps), a large portion of drivers still rely on the built-in radio tuner for simplicity. Notably, many vehicles – especially older models – only have analogue (FM/AM) radios and upgrading them is costly or impractical, so those drivers stick to broadcast signals[27]. This underscores that mobile IP listening hasn't entirely supplanted broadcast in cars and portable use cases yet. In summary, IP-based listening is most dominant in fixed environments (home/office) where connectivity is strong, while broadcast radio retains advantages in mobile scenarios (especially car travel) due to its plug-and-play reliability. However, with expanding 5G networks, unlimited data plans, and new cars shipping with internet connectivity, the gap is expected to close, making mobile IP radio ever more commonplace.

5 Viability and Sustainability of Radio Services in the IP Era

The proliferation of streaming radio services raises questions about the viability and sustainability of the many "programme services" (stations and content streams) now available. On one hand, the low cost of entry for internet radio has unleashed a profusion of niche and community services – anyone with a modest budget can start a streaming station, reaching potentially global audiences without needing a broadcast licence. This has led to a long tail of specialised stations (from genre-focused music streams to community talk and hobbyist stations) riding on IP platforms. The small-scale DAB rollout in the UK similarly enabled hundreds of new local and specialist stations (over 590 new program services on 64 multiplexes so far), many of them unique offerings for underserved audiences[28]. These new services often operate on shoestring budgets or as volunteer-led projects. While choice and diversity have increased, sustainability is a concern: can these stations find viable business models to survive in a crowded audio market?

Most traditional radio stations (BBC aside) rely on advertising, but as audiences fragment across thousands of streams and podcasts, advertising alone may not sustain smaller outlets. Indeed, radio groups report that digital listening growth has intensified competition for ad revenue, squeezing the finances of broadcasters who must now share the pie with music streaming giants and tech platforms[29]. Small IP-based stations, in particular, often cannot generate significant ad income due to limited listenership and lack of ad sales infrastructure. Moreover, content costs and royalty payments (for music rights, for example) apply to online radio just as they do to FM, which can burden small operators if not managed. There is evidence that many internet radio ventures struggle: *the barrier to entry is low, but the barrier to growth and profitability is high* – "all can't be profitable; there are too many", as a Wharton digital media study observed about internet radio startups[30]. This has led to high churn, with stations launching and shutting down frequently in the IP space.

For existing broadcasters shifting to IP distribution, sustainability issues take a different form. They must maintain quality content and branding across both broadcast and online platforms, potentially diluting focus or increasing costs. Additionally, they face gatekeeper platforms (tune-in aggregators, voice assistant ecosystems) that might impose new charges or conditions. The UK radio industry has lobbied for regulatory support to guarantee free carriage on these platforms, precisely because the future viability of UK radio could be threatened if, say, smart speaker providers started demanding carriage fees or privileging their own "radio-like" streams[31].

All this suggests that new, innovative business models will be needed to sustain radio services as the sector transitions. Stations – especially community and niche services – are exploring mixed revenue streams: donations, membership models, crowdfunding, merchandise, live events, and partnerships with local businesses or institutions. In the community radio sector, some support is coming from the government; for example, the UK's Community Radio Fund has recently been boosted to £1 million per year to help small stations cover core operating costs[32]. This kind of direct support acknowledges that not-for-profit media serving social goals may not survive on commercial income alone. Other emerging models include subscription or premium content (though asking listeners to pay directly for radio is challenging in a world of free alternatives) and syndication of content across platforms (leveraging popular radio shows as podcasts or video streams that can attract sponsorship beyond traditional ads).

For the myriad stations being carried on new platforms (whether small-scale DAB or global internet directories), collaboration and cost-sharing will also be key. We may see clusters of community stations sharing studio facilities, or multiple niche streams sharing a common ad sales and streaming infrastructure, to achieve economies of scale. Automation and tech efficiencies can reduce costs too – cloud-based playout systems, AI DJs, etc., though at the possible expense of local talent. In short, ensuring the sustainability of program services in the IP era will require creativity and likely a shift from the old one-size-fits-all ad-supported model to a mix of funding sources. The goal for many smaller broadcasters is not massive profit, but simply resilience – being able to continue serving their audience without running at a loss. That may involve embracing non-traditional models of support and measuring success in social value as much as in revenue.

6 The Case for Retaining AM/FM and DAB Broadcast Platforms

Despite the growth of internet radio, there is a strong case – argued by many community media advocates and industry experts alike – for retaining traditional broadcast platforms (AM, FM, and DAB) alongside IP delivery. One key argument is that broadcast spectrum used for radio has little or no alternative commercial use. The FM band (around 88–108 MHz) and AM medium-wave band are not in demand for mobile telephony or other lucrative communications services (unlike, say, former TV frequencies that were repurposed for 4G/5G). If these bands were vacated by radio, they would like-

ly remain underutilised or face only niche uses. In other words, keeping them allocated to radio incurs minimal opportunity cost. Meanwhile, millions of radios are in circulation – from battery-powered FM sets in kitchens, to car radios, to DAB portables. The widespread availability of receivers means that broadcast radio can reach virtually everyone, including those who may not have reliable broadband or tech-savvy to use streaming.

For many elderly, vulnerable, or low-income listeners, an inexpensive radio set is a lifeline to news, entertainment, and emergency information[33]. Ensuring these listeners are not disenfranchised is a public service imperative. Even in 2023, about 27% of UK radio listening was still via AM/FM[6] – amounting to several million people daily. The government has explicitly recognised this in policy: the official stance (after the 2021 review) is that it would be "premature to consider a formal switch-off of analogue services before 2030", given the significant portion of the population that continues to rely on FM/AM[34]. FM services are now guaranteed to remain available at least until 2030, with a mid-term review in 2026, ensuring listeners can choose their preferred platform[35].

In addition to social inclusion, broadcast radio offers technical and practical advantages that complement IP streaming. Broadcast is free at the point of use – no data charges, no subscription, and it doesn't depend on having an internet connection. This makes it highly accessible and resilient. In emergencies, broadcast radio is valued as a reliable medium: as long as a transmitter is on air, anyone with a receiver can get information, even if power or internet is down. (This, of course, assumes the transmitters themselves are powered – they are "single points of failure" – but robust transmitter infrastructure with backup power can often continue when broadband networks fail[36].) Radio's role as an emergency broadcaster is one reason many countries are cautious about dismantling analogue radio networks.

Additionally, broadcast signals have no latency and minimal distribution cost per listener. Whether one person or one million people tune to an FM station, the cost to transmit is the same – a stark contrast to IP streaming, where each additional listener consumes additional bandwidth (which someone has to pay for). This means radio is inherently scalable and can handle surges in listenership (e.g. during a major event) without the congestion issues that web streams might encounter. Coverage is another factor: a strong FM signal can blanket a region with near-uniform reliability, whereas internet coverage can be uneven and dependent on many intermediate systems (ISP net-

works, servers, etc.). For local content, FM/DAB also ensure a geographically bounded service – useful for targeting community-oriented programming and advertising, something that global internet radio doesn't do by default.

The cost of running broadcast services, while non-trivial, can be justified given these benefits – especially if new approaches are taken to mitigate costs. Large national AM transmitters may be energy-inefficient (leading to many being shut off), but FM and DAB networks can be optimized. For example, switching to more energy-efficient transmitters or sharing infrastructure among stations can cut expenses. In the UK, many commercial and BBC stations have already consolidated transmitter networks. Small-Scale DAB (SSDAB) is a case in point: it uses lower-power transmitters and open-source tech to drastically reduce the cost of broadcasting on DAB for community and niche stations[37][38].

This kind of innovation can keep over-the-air broadcasting economically viable for smaller entities. There are also proposals for alternative business models to support broadcast uses of spectrum – for instance, treating some radio transmitters as community infrastructure (with public or grant funding) rather than requiring each broadcaster to fully commercially fund their own. If commercial operators continue to migrate to national DAB or online platforms, the analogue spectrum could be opened up to non-traditional operators (community trusts, educational institutions, startups) at low or no licence cost, ensuring it doesn't sit idle. Already, where big broadcasters have closed AM services, there are calls to let community stations use those frequencies. The excess capacity on FM/DAB could be filled by experimental and grassroots broadcasters if a more permissive licensing regime is adopted. Advocates argue that "maintaining support for both analogue and digital services" in parallel, and allowing broadcasters to choose their platform at their expense, would foster a pluralistic media ecosystem that respects listener choice[39][35].

In essence, retaining legacy broadcast isn't about clinging to the past for its own sake; it's about leveraging all available platforms to maximize public value. The spectrum is there, and if it's not used for radio, it likely won't be used to benefit the public at all. By keeping FM/DAB alive, regulators can provide a safety net that complements the new world of IP streaming. It buys time for audiences to transition at their pace (preventing a forced march to digital that could alienate some groups) and keeps an alternative distribution path open – one that's decentralized and not entirely under Big

Tech's control. The cost of doing so can be managed by scaling down where appropriate (for instance, lower power at night, or regionalising certain AM transmitters) and by exploring innovative funding (such as shared multiplexes or public grants for community content). This approach ensures that, as the media landscape evolves, radio remains accessible, resilient, and diverse.

7 Avoiding Fallow Spectrum: Innovation and New Business Models

A cautionary tale in the UK radio sector has been the sight of unused frequencies and stagnation caused by overly rigid transition policies. During the prolonged roll-out of small-scale DAB, many analogue community stations waited in limbo, and some AM/FM channels went silent with no replacements allowed – effectively spectrum lying fallow. As noted, the expectation of an imminent digital switchover (which keeps being delayed) distorted the market: incumbent broadcasters could drop services or move online, but new analogue entrants were blocked from coming in to fill the gap[21]. To avoid repeating this scenario, stakeholders argue that a more dynamic and flexible approach to spectrum management is needed, one that encourages creative use of any available broadcast capacity.

This could involve shorter-term licences, pop-up radio services, or bandwidth-sharing arrangements that let multiple content providers use one frequency (time-shared community stations, for example). Such experimentation would require alternative, non-traditional business models, since the classic commercial radio model might not fit these smaller or intermittent uses. For example, a community cooperative might jointly fund a transmitter, and each member group gets a slot to broadcast content, supported by member dues or local donations rather than ads. Another model could see local government or nonprofits sponsor broadcast content (for community health info, education, etc.), essentially treating radio as a public utility in some areas.

Policymakers and regulators are gradually acknowledging that IP-based media delivery is a fast-growing force that cannot be ignored. The Department for Digital, Culture, Media & Sport (DCMS) in its Digital Radio & Audio Review (2021) recognised that online platforms and smart speakers are transforming audio consumption, and it recommended actions like ensuring UK radio stations have prominence on voice assistants[40]. DCMS agreed with the review's conclusion that forcing an analogue switch-off too soon would be premature, and thus has kept FM on air to 2030[34]. However,

community media proponents urge DCMS to more actively embrace IP-based content as a platform for innovation. The internet allows new entrants and experimental formats that would never find space on the tightly regulated FM dial – from global niche music streams to localised podcast-like stations. These innovations can challenge existing providers who have long operated in a sheltered, regulated marketplace with high barriers to entry.

The regulatory "protection" (limited licences, ownership caps, etc.) that traditional broadcasters enjoyed is weakening in the face of global online competition. Community advocates argue that DCMS should respond not by trying to extend old protections to the online world (which may stifle innovation), but by encouraging innovation and competition that ultimately benefits listeners. This means recognising internet radio, podcasting, and streaming not as inferior or secondary mediums, but as legitimate parts of the radio/audio ecosystem deserving of support and strategic attention. For instance, support could come in the form of training and funding for community groups to launch online radio services, or ensuring that media policy (and the upcoming Media Bill) does not disproportionately favour incumbent FM/DAB broadcasters at the expense of online-only stations.

From a business standpoint, existing radio providers need to adapt their models if they are to thrive in the IP-dominated future. They can no longer rely solely on regulatory scarcity (being one of a few stations in a town) to guarantee an audience or ad base. Many are already evolving – offering podcasts, on-demand shows, interactive apps, and leveraging social media to engage audiences. The BBC, for example, has its BBC Sounds platform to blend live radio with online content, and commercial groups are launching brand extensions that exist only online or on DAB. Such moves acknowledge that audio content delivery is becoming platform-agnostic: consumers care about the content, not whether it comes via FM, DAB, or an app.

Providers dependent on old protections must innovate in content and distribution to remain relevant. We are likely to see more convergence between broadcast and IP. One could imagine a future where a broadcast frequency might carry a rotating selection of pop-up streams (curated from internet content) to maximize usage, or where internet platforms carry linear radio streams but with metadata and interactive features layered on.

In summary, IP-based media distribution is a fast-growing trend that is reshaping radio, and it demands a proactive response from both industry and regulators. Embracing this trend can lead to a renaissance of radio as a richer, more interactive medium – but it also means confronting the discomfort of competition and change. DCMS and Ofcom are urged to facilitate this by creating a regulatory environment that encourages innovation across all platforms. That includes keeping legacy spectrum in play with new business models so it doesn't go to waste, as well as ensuring fair access to new platforms so that dominant tech companies do not become the new gatekeepers of audio.

The ultimate goal championed by community media advocates is a pluralistic radio landscape – one where traditional AM/FM, DAB, and IP streaming all coexist, each used to its strengths, and where listeners have the freedom to choose their medium[39]. By retaining what works from the old and welcoming the new, the radio industry can continue to be, in the words of one Ofcom director, part of an "all-you-can-eat buffet" of content for audiences, rather than a shrinking silo[41]. The rise of IP radio is not the end of broadcast radio, but a catalyst forcing the medium to reinvent itself – and if guided wisely, that reinvention can lead to a more resilient, inclusive, and innovative audio ecosystem for the future.

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