Podcast production and marketing strategies on the main platforms in Europe, North America, and Latin America. Situation and perspectives

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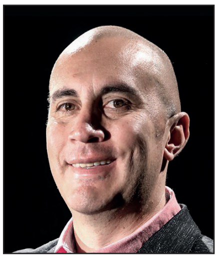

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Abstract

Fifteen years after the term was coined, the podcast is now consolidated as a sound format with a specific identity within the digital media ecosystem. The practice of podcasting is none other than radio, but one encompassing diverse production on both expressive and thematic levels whose properties (mobility, narrative fragmentation, and the integration of multiple devices) and personalized consumption generate a very different listener attitude compared with traditional radio. After an initial period of independent amateurism strongly conditioned by the technologies available, the podcast has achieved significant global popular recognition, as well as an increasingly important professional dimension thanks to the emergence and spread of new distribution platforms (podcast networks) designed to serve as alternatives to the dominant feeds (such as *Apple Podcasts*, *Google Podcasts*, *iVoox*, and *Spotify*) that rely on different catalogs and business models. This investigation identifies, describes, and systematically orders the main management and marketing models for podcasts on these platforms on the basis of a comparative analysis of fourteen of them, two in each of the eight countries in Europe, North America, and Latin America where this format is most widespread: *Acast* (Sweden); *Podimo* (Denmark); *Binge Audio* and *Majelan* (France); *Podimo Spain* and *Podium Podcast* (Spain); *PodcastOne* and *Luminary* (USA); *Convoy Network* and *Puentes* (Mexico); *Posta* and *Parque Podcast* (Argentina); and *Pia Podcast* and *Podway* (Colombia). The study measures and compares the offerings of each of the studied platforms using different quantitative and qualitative variables (age, territorial reach, content categories, dominant genres, funding, and consumption). The objective is to start to draw up a global map of the main operators in the podcasting industry, and to identify the production trends and marketing strategies of a format with increasing impact and demand, destined to become the future heir of broadcast radio.

Keywords

Podcasts; Podcasting; Digital audio; Platforms; Digital production; Marketing; Digital business models; Monetization; Audio communication.

1. Introduction

Currently, there are 7.91 billion people in the world. The population layer is immersed in a media ecosystem marked by the emergence of the Internet (62.5% of people use the web) and the normalization of devices with network access (67.1% of people use a smartphone to connect) (*We are social*; *Hootsuite*, 2022). The emergence of technology-mediated communication has given rise to the concurrence of language and media, to the multiplication of the means and points of access to content, and to the consolidation of new logics related to the digital transformation in a scenario that is clearly convergent.

The changes in the subject's relationship with the media have redefined information and enjoyment habits, thus transforming the logic of management and production by the media industry (**Nielsen** *et al.*, 2020). The digital user imposes a route of action in which content must be considered for its immediate or later consumption, from any device and at any time (**Kishigami**, 2004). Content is personalized for an audience accustomed to enjoyment –with increasing freedom and autonomy– to the possibilities of empowerment, participation, and interaction offered today by the digital environment 2.0, 3.0, and 4.0 and the tools of social networks (**García-Marín**, 2020a).

The evolution of consumption routines by audiences has caused a progressive loss in the impact and relevance of traditional television and radio programs (**Bonet**; **Sellas**, 2019). These had monopolized audiovisual consumption until the emergence of the Internet eliminated the access barriers to the audiovisual market and made it possible for on-demand audio and video distribution services to become available. The popularization of these new platforms (*Netflix*, *Disney*, *HBO*, *Amazon Prime*, *Spotify*, *Apple*, etc.) has not just diluted the nature of the traditional media with whom they compete and even substitute (radio and television concepts have acquired another dimension in the digital ecosystem), but rather they have caused the need for a deep restructuring in their business models at all levels (**Benghozi**, 2011; **Clares-Gavilán**; **Merino-Álvarez**; **Neira**, 2019). In addition to the innovative cultural offering they represent by amassing catalogs with millions of options (series, movies, songs, books, and podcasts), the great contribution of these new players –and at the same time the key to their economic profitability– lies in converting the variety and multiplicity of products, their innovative and original content, and the immediateness and easiness of access into irresistible and indisputable advantages to attract and retain the loyalty to take this offer (**Calvignac**, 2017).

The dynamics of consumption via the Internet (TV broadcast/streaming: 3h 20min, social networks: 2h 27min, paper/online press: 2h, streaming music: 1h 33min, broadcast/online radio: 1h 1min, video games: 1h 12min, and podcasts: 55 min (*We are social*; *Hootsuite*, 2022) revitalize spoken audio –as an element of communication– which is incorporated into the diet of content consumed by the youngest layers of the population. The user consumption road map invites the sound industry to delimit a period of change in which the management, distribution, and marketing models for audio content will be defined to meet the new demands and requirements of an audience immersed in the screens of their devices: smartphone, 96.6%; computer or laptop, 63.1%; tablet, 34.8%; video games console, 20.3%; smart watch 27.4%; and glasses, 4.8% (*We are social*; *Hootsuite* , 2022).

In the digital ecosystem, radio lost its monopoly on sound, users begin to compete with the production and circulation of podcast products in a scenario that calls for a review and analysis of what exactly has been extrapolated from the medium of radio, ranging from its analog context (programming, production, distribution, and marketing), to the podcast framework: technological, production, and structural variables that determine how the digital transformation of the sound industry is managed. While the term "digital sonosphere" may be considered novel and inaccurate for the research and study of audio consumption (**Torras-Segura**, 2020), it should be conceived of it as an atmosphere of sound interfaces (web, apps, social networks, and audiobook and podcast platforms) that make it possible to personalize the synchronous consumption of an antenna radio product and the asynchronous or on-demand consumption of the native material (**Newman**; **Gallo**, 2019) conceived for the digital space.

The convergence of sound via radio and podcasts obliges us to study the similarities of their content (both are audio-based) and how they bring relevance to genres and formats that were pushed aside by the radio industry in the 1980s. The features, reports, and sound-fiction –to mention a few– are regaining their value in communication and in overcoming the previous stage of the distribution and downloading of fragmented radio content or programs (**Cebrián-Herreros**, 2008). The podcast as a sound format for digital consumption and distribution subsequent to subscribing to a channel (**Gallego-Pérez**, 2010; **Sellas**, 2009) has made a genuine contribution beyond complementing radio programs and changing their concept: the reconsideration of the way that traditional radio content is consumed, produced, and distributed (**Berry**, 2006). The democratization of sound on distribution platforms poses four main challenges to its creators in positioning themselves and becoming relevant in the consumption of listeners/users: coordinated multi-channel broadcasting; convergence of sound with textual, iconographic, and visual elements; new metrics that account for the scope and specific consumption of audio and video, and their visibility on social networks; and the incorporation and recognition of new professional profiles in the sound industry.

The penetration of on-demand video subscription platforms (*Netflix*, *Disney*, *HBO*, and similar platforms) exceeds 93% globally. The same position is held by audio (*Spotify*, *Apple*, *Deezer*, etc.) and through podcasts it exceeds 20% inclusion globally: Mexico, 34.5%; Sweden, 28.9%; Portugal, 24.6%; United States, 23.5%; Colombia, 21.5%; Spain, 21.3%; Denmark, 20.6%; Argentina, 16.9%; France, 12.5%, etc., (*We are social*; *Hootsuite*, 2022). Podcast presence is growing as the result of the general expansion of landline and mobile connectivity, the spread of devices, and the consolidation of on-demand digital content platforms.

According to the data provided by *VoiceUp* (2021), 55% of US citizens have listened to a podcast, a figure which was less than 25% in 2009. On balance, 75% of the US population (around 211 million people) are familiar with the term, compared with 64% in 2018. The genre is also seeing strong growth in Latin America (75% interannual in 2020), where titles in Spanish had already grown 13% in 2018, and where five countries in the *Voxnest* consulting report (2020) are in the world ranking of the 10 countries with the greatest growth in podcast consumption: Colombia, Argentina, Brazil, Chile, and Mexico. In addition, the latter's capital has become the city with the highest number of streaming listeners (**Martín**, 2019). In Spain, the *IAB Spain's Annual Online Audio Study* (2020) observes that almost seven of every ten Internet users (68.5%) listen to online audio daily, 3.7% more than in 2018. Although music is the dominant content (43%), 19% of those surveyed mentioned the podcast, doubling the 7.2% of Internet users who listened to or downloaded podcasts in 2019 according to the *General Media Framework* (*AIMC*, 2020).

To identify the role of digital podcasting platforms and their impact on the structure, management, production, and marketing of podcasts, this study intends to explore some of the main experiences in the global market apart from *Apple*, *Google*, or *Spotify*, considered as models of global podcast platforms in the studies and reports carried out to date (**Sullivan**, 2019; **Nieborg**; **Poell**, 2018; **Morris**; **Patterson**, 2015). The intention is to recognize, compare, and assess the experiences that are now established, from both the perspective of commitment to the public and that of the testing of new means to generate income. The paper entails an exploration of an unprecedented ecosystem whose creation, production, and broadcasting routines have been altered by the convergence of technologies, the confluence of channels, and hybrid narratives: content via antenna, apps, web pages, social networks, push notifications and smart loudspeakers that do not exempt it from the requirement to continue cultivating its intrinsic value of authenticity, the demands of objectivity, independence, and clarity that are inherent to communication (**Singhal**; **Kim**, 2021).

2. Theoretical framework

In order to talk about podcasts, we must review their history and acknowledge a series of milestones that have marked their evolution since they were recognized and characterized at the dawn of the 21st century. The conceptual precedent of the sound phenomenon now materialized in the podcast is radio (**Murray**, 2009; **Edmond**, 2015), and its earliest precedent in the digital ecosystem was the first five years of 2000, with the convergence of the *MTV* journalist and blogger Adam Curry with Dave Winer, a computer scientist and content syndication developer, that led to audio being linked to blogs (**Hammersley**, 2004).

The innovation in the concept of audio via the digital sonosphere led to two things that sustained its success with the public: the introduction of the enclosure tag by Dave Winer that resonated with a society comprising an audience impacted by the boom in music created by the rise of the MP3 format and portable multimedia players. Influenced by this technological event, the media biosphere caused a disruption with radio in listeners by personalizing content and creating playlists. These latter were subsequently leveraged by those who understood that this sound medium could be successfully used to get –besides music– information and entertainment to listeners/users (**Perse**; **Butler**, 2005). The first stage of the podcast (curiosity, experimentation, and expansion), which extends from its beginnings to 2012, has a second phase. This occurred when some successful podcasts on US public radio decided to emancipate themselves economically and seek return on investment via crowdfunding platforms and donations from their listeners and thus enjoy a certain independence (**Bonini**, 2015).

The *Serial* podcast by the *NPR* journalist Sarah Koenig, marks a before and after in podcast history: its high number of downloads (more than one million a week during its first season) caused several theorists to name this phase the "Second Golden Age" of podcasts, a format that brought back one of the classic genres of the radio medium, radio serial (**Terol-Bolinches**, 2016). It became a distribution technology comparable to a mass communication medium (**Bonini**, 2015). *Serial* gave podcasting a hopeful future thanks to the increase in users with network access and, especially, the exponential penetration of smart phones during those years (**Berry**, 2015). The transition from an amateur to a professional environment in the distribution of sound content based on its profitability thanks to inserted advertising (**Bonini**, 2015) does not prevent the continued presence of domestic creators in this sound environment, open to both authors who try out this format on an individual basis and producers who take a chance on podcasts as alternative channels to radio, television, or even printed media.

The third milestone that will mark the history of the podcast is at the end of the second decade of the 21st century, and it refers to the fight of the sound content aggregation platforms to capture the attention of a volume of creators and users that will attract the investment of advertisers and brands. **Gallego-Pérez** (2021) claims that the current digital landscape is a form of platform capitalism in which multiple services (music platforms, instant messaging services, live music companies, vendors, device companies, major record labels, radio players) compete to gain control over the sound market. It is interesting at this point to clarify the differences between aggregators and podcast platforms. As explained by Arense-Gómez, Terol-Bolinches and Pedrero-Esteban:

> "There are substantial differences between music streaming platforms and aggregators (websites or mobile applications that collect content generated by third parties, who may be producers or media users) in terms of labeling and categorizing the podcasts they host and offer to their users. In the process of indexing a podcast, some distributors allow the creator to classify their content by assigning tags, while in other cases it is the platform itself that determines the category of the podcast when registering the feed (**Kischinhevsky**, 2017). Aggregators such as *iVoox*, for example, allow users to categorize their sound content into the ontologies proposed on the website when uploading the audio files" (**Arense-Gómez**; **Terol-Bolinches**; **Pedrero-Esteban**, 2019, p. 5).

Audio aggregators offer greater segmentation based on themes and content, although the number and diversity of categories and subcategories makes it difficult to locate a podcast quickly and effectively. The platforms provide simpler categorizations, if any, and offer simpler and more intuitive searches of the audios, but their classifications are too general. Third-party content aggregators, through RSS links, incorporate them into the podcast library platforms so that users can listen to and organize them, and even subscribe (**Arense-Gómez**; **Terol-Bolinches**; **Pedrero-Esteban**, 2019; **Sullivan**, 2019; **Gallego-Pérez**, 2021). The so-called Era of Big Podcasting (**Quah**, 2019) comprises the global dimension of the sound universe in which the ease with which one can create, distribute, and listen to a podcast has brought this format –which has more than a million titles registered in *Apple Podcasts* (it took 16 years to reach this amount), along with an increasingly globally heterogeneous platform in creation, distribution, and marketing models (**Espinosa-de-los-Monteros**, 2020)– to a turning point that positions it in a growing market.

Initially, the podcasting platform was globally focused on the *Apple iTunes* portal which, when it launched version 4.9 June 2005, added podcasts to its music catalog. In just two years, it attained one million subscribers, which reached 5 million in 2013. It gradually caught the attention of audio-kiosks such as *iVoox*, the most recent sound repositories of *Himalaya* and *Google Podcasts*, or the unexpected commitment of *Spotify*, which now concentrates on this format. The Swedish company *Spotify*, world leader in music streaming services (in July 2021, it had 365 million users, 165 million of whom were paying users), acquired *Gimlet Media* in 2019 as proof of their firm commitment to competing for the attention of digital audio listeners. In addition, they purchased the startup *Anchor*, an application that makes it possible for even novel users to record and distribute podcasts. These moves have converted *Spotify* into the world's second-biggest platform in the sector, second only to *Apple* (**Rodríguez-Canfranc**, 2020).

Table 1. Global share of the subscriber market

Global users: 487 million			
	32%		16%
	13%	Tencent	13%
	8%		4%
deezer	2%	Yandex	2%
PANDORA	1%	**Otras**	9%

Source: *MIDiA Research Music Model* (**Mulligan**, 2021)

As in other sectors of the digital content industry, the podcast is still searching for a solid revenue model that guarantees its profitability. In this case, the sector has few entry barriers, as the recording and distribution of acceptable-quality audio does not require a large investment (**Izuzquiza**, 2019). However, for the same reason, the podcast is still associated with a repertoire of overly heterogeneous productions that extends and experiments with more and more creative and narrative variants (seasonal, episodic, multiple, etc.), and mixes works from very disparate origins and accounts (**Orrantia**,

> The podcast denotes divergent logics that give context to information, leisure and entertainment in a world that concentrates consumption through screens and normalizes the paradigm of connectivity, ubiquity, timelessness, interactivity and subscription of users to various services to meet their needs within the framework of media convergence

2019; **Ribes-Guàrdia**; **Pérez-Alaejos**; **Porta**, 2019), which gives even more relevance to the configuration). This makes the configuration of aggregators and platforms trying to make a dent in the headphones and smartphone ecosystem even more important (**Fernández**, 2018).

2.1. World podcast markets

The podcast phenomenon is a global phenomenon, and the podcasting industry has invaded the market worldwide via platforms for the production and distribution of the most diverse sound content. Despite the fact that COVID-19 has slowed investment in advertising, the forecast for the growth of podcasts will remain at 30% interannually in this period, reaching 3.3 billion dollars, thanks to revenue derived from subscription platforms. The market is extremely dynamic and many large companies are investing in the industry. The audiobook and podcast markets are growing much faster than the market for global entertainment content –between 2% and 4%– although the revenues from advertising in the audio world are notably different in the USA than in Europe: advertising investment in European podcasts will reach 232 million dollars only in 2023, in comparison with approximately 1.5 billion dollars in the USA (**Gelado**, 2020). These figures are, without a doubt, one of the symptoms that identify that, despite the industry expanding globally, the growth rates and levels of progress are not equal in all countries. In this context, four different markets can be differentiated:

US market

Currently handles podcast advertising investment of around 1.5 billion dollars. *The New York Times* is one of the main global audio producers and its brand has led it to lead the sector, establishing synergies and coalition strategies with *This American life*, for example, first *Pulitzer Prize* winner in the audio category. The consumption of weekly podcasts has also increased considerably, and some of the main world podcast editors achieve millions of transmissions and single downloads per month. In addition to a niche format, podcasts in the USA have become part of the strategy of conventional media. Podcasts are also often used as part of marketing strategies or to generate commitment between bloggers, news publications, or even different departments within a company. Some examples of the podcasts most listened to in the USA according to *Apple Podcasts* data are (*Podtail*, 2020)

- *Crime junkie* (true crimes);
- *The daily* (news);
- *Let's not meet: A true horror podcast* (true crimes);
- *Something was wrong* (culture and society);
- *The Joe Rogan experience* (comedy, culture, and society);
- *SmartLess* (comedy, education);
- *Call her daddy* (comedy).

Asian market

The Asian market has a Chinese digital audio giant called *Ximalaya F.M.* with more than 40 million daily users. The revenue model in China is based on final user payment, whether via subscription or listening to individual pieces. Another distinctive feature of Chinese podcast platforms is that they use social elements and gamification. Users of the *Ximalaya* podcasting app win coupons for listening to audios or for spending money on the service, which increase based on the number of points won. *Ximalaya* stated that it had 450 million users and more than 5 million hosts, including numerous opinion leaders and key online celebrities (**Jie**, 2018). Moreover, another of the big media, *Dedao*, functions as a social network in which the customer can create a profile. For the hundreds of millions of new users of smart phones/Internet in small cities, towns, and rural villages in China, the first wave of applications adopted were fun social applications such as *Douyu* (live broadcasting) and *Weibo* (microblogging). However, there is a growing tendency for this giant group of users to move towards applications with more intellectual sustenance. The educational audio course is one of the major types of paid content. These are, according to **Chen** (2018) some of the most popular paid content:

- 好好说话 (*Speak properly*) (198 RMB/year), a training program in the art of conversation, with a focus on workplace communication.
- 李翔商业内参 (*Li Xiang Commercial Internal Gins*) (previously 199 RMB/year, now free), a daily business news audio/text update. It had more than 60K paid subscribers.
- 凯叔讲历史 (*Uncle Kay tells the history*) (199 RMB/year), an introduction to Chinese history program for small children.

Audio entertainment programs are becoming a popular learning channel. The American business model, based above all on advertising revenue, has started to steal glances at the Chinese. And there is good reason: while the US podcasting market generated 314 million dollars in advertising in 2017, estimates value China with figures that oscillate between three and five billion (**Rodríguez-Canfranc**, 2019).

European market

In Europe the concept of podcasts is still associated with a repertoire of overly heterogeneous productions that extends and experiments with more and more creative and narrative variants (seasonal, episodic, multiple, etc.), and mixes works from very disparate origins and accounts (**Orrantia**, 2019; **Ribes-Guàrdia**; **Pérez-Alaejos**; **Porta**, 2019). Europe is a highly fractured market due to, among other things, the multiplicity of languages that make it up, but following the theory of **Sojka** (2019), it is in constant growth and will fragment even more after Brexit. The author establishes six levels of maturity in the podcast market.

- At this stage, podcasting is a small niche boosted by amateur creators, with an existing, non-monetized local podcast ecosystem.
- Countries like Poland go a step further, with significant growth in recent years, where the most popular podcasts are 100% recycled radio programs.
- On the third level, amateur creators coexist with professional producers, and although monetization has begun to be discussed, it is not yet very common. This is the case in Spain and the Netherlands, where many of the podcasts produced are already professional, but there are still recycled radio programs.
- At the fourth most advanced level of the ecosystem, the ecosystem is becoming increasingly more mature and produced with a higher budget and monetization efforts. Creators in countries such as Germany, France, and Scandinavia produce a large quantity of high-quality content.
- The United Kingdom is already in Phase 5 with a mature podcasting market with real monetization. We are faced with a medium-sized media channel with high-quality programs.
- The highest level, according to Sojka, corresponds to the dynamics of the USA, where 70% of US citizens are familiar with the podcast concept and production expenses are immense for a monetization that has become a central axis.

Spanish-language podcast market

The Spanish-language markets are in the top ten ranking of the countries with the greatest production of new podcast in the last period. The market that uses Spanish as its language is the fastest growing market and according to the arguments of **Espinosa-de-los-Monteros** (2020), after the success of *Serial* in the USA, the ambitions of Spanish-speaking creators increased. The evolution of podcasting in Spanish is no different than that of other markets. It all begins with productions by amateur producers which then group into networks. Some of progress towards becoming professionals with the aim of making the medium economically profitable. Alongside *Podium Podcast* and *Cuonda* as pioneering projects in Spain (**Izuzquiza**, 2019), worthy of mention is the 2012 founding of *Radio Ambulante*. Its objective was to tell stories from Latin America from within the USA with the collaboration of local producers. Mexico, Argentina, Colombia, and Peru are the leaders in Latin America. In the case of Mexico, the oldest producer is *Dixo*, with a trajectory of more than 15 years. Together with *Dixo*, others such as *Convoy* and *Puentes* have achieved support for their growth by managing to change their business structure to a functional company structure. With regards to Argentina, interest in podcasting has gone beyond the commercial sphere with the *Podcast Union* initiative. Founded in 2017, it is intended to be a link among Latin American podcaster communities. In addition, we must highlight the work of platforms such as *Posta* and *Parque*, both created by radio professionals.

It is important to point out that the best Latin American narrative podcast was created by a Peruvian, Daniel Alarcón. It is the precursor to the podcast in Hispanic America with *Walking Radio*. One of the oldest Peruvian podcasts is *El Langoy Podcast*, which was created in 2014, founded by Carlos Wertherman. We must highlight *Ponycorn Podcast*, affiliated to *Ponycorn Design Club*, and *IGDA Peru*, a program that discusses matters on the production and creation of video games from the perspective of professional developers. In Colombia, both the press and the public radio have given the podcast business a strong boost and some radio presenters have decided to jump into production, taking their listeners to this format. The current reference platforms in Colombia are *Podway*, *Akorde*, and *PIA Podcast*.

3. Analysis methodology

The transformation of the audiovisual industry and the novel production and marketing models developed in the online sound ecosystem revitalized the value of sound in user consumption agendas in on-screen devices. The spread of podcasts in the media ecosystem of each analyzed nation, with the regional particularities of the different settings, are the focus point of this work which makes a comparative evaluation of the diverse experiences of podcasting platforms in the world. The investigation is carried out via a descriptive methodology (**Guevara-Alban** *et al.*, 2020), analysis of the cases selected in the sample (Table 2), the intention of which is to learn about the contexts in which these platforms arose, and to establish a systematic objectification of the trends on which it will be possible to create a guideline to extend and apply the studies to selected cases.

For the selection of the study sample, representativity and regional balance criteria were considered together with the platforms: on the one hand, from a geographical perspective, on the other, a numerical perspective. Hence, places with a consolidated offer have been chosen that will allow for two options to be selected in each territory. The research seeks to extend the results beyond the Spanish language market, to carry out a comparative analysis (**Marolla**, 2019) understood as a social research field tool that allows for conclusions to be set and trends to be perceived regarding the differences and similarities, which contributes to the formation and systematization of concepts.

From the analysis of different real patterns of common denominators, but also facets, and which are at different stages within a market under construction, this research bases its methodology on the model of analysis proposed by Terol-Bolinches, Pedrero-Esteban and Pérez-Alaejos. It starts from the basis that

> "the characteristics of each analyzed platform (the dependent variable) are the result of interaction between its territorial reach, the genre categories and content, the dominant topics, the funding model, and the way users relate and consume (the independent variables)" (**Terol-Bolinches**; **Pedrero-Esteban**; **Pérez-Alaejos**, 2021, p. 478).

Table 2. Study object sample

Continent	Platform	Countries	Population	Internet uptake regarding the population	Podcast uptake in Internet users
Europe	*Acast*	Sweden	10,218,972	98%	28.9%
	Podimo	Denmark	5,834,952	99%	20.6%
	Binge Audio	France	65,584,513	93%	12.5%
	Sybel				
	Podium Podcast	Spain	46,719,147	94%	21.3%
	Podimo				
North America	*Luminary*	United States	334,805,268	92%	23.5%
	PodcastOne				
Central America	*Convoy Network*	Mexico	131,562,775	74%	34.5%
	Puentes				
South America	*Posta*	Argentina	46,010,233	83%	16.9%
	Parque Podcast				
	Podway	Colombia	51,512,776	69%	21.5%
	PIA Podcast				

Source: Prepared using *2022 Digital Data: Global overview report* (*We are social*; *Hootsuite*, 2022)

Thus, three more detailed context levels are distinguished whose analysis is fundamental (Table 3). Methodologically speaking, this research identifies, describes, and systematizes the business model in fourteen networks located in seven countries based on the indicators corresponding to each level.

Table 3. Levels of analysis

Level	Description	Theoretical reference point
Content production process	This revolves around creative development, the treatment of topics, the frequency of productions and their duration, and the determination of the nature of the platform as an aggregator of own- or third-party content.	Capital logics (**Sullivan**, 2018). Content via podcasting (**Sellas**; **Solà**, 2019).
Content distribution methods	Options and alternatives that are offered from the user platform to enable access to podcasts and different user connection routes.	User participation (**García-Marín**, 2020b). User behaviors and routines (**Heshmat**; **Yang**; **Neustaedter,** 2018).
Business model	Ways to monetize content and ownership structures that can be accounted for.	Podcasting as a company (**Gallego-Pérez,** 2012). Capitalization of listeners using podcasts (**Schmitz**, 2015).

This study measures the offers of each network via twelve indicators: production process; topics; frequency of production; duration; distribution; social networks; interaction with listeners; user profile; ownership structure; monetization; advertising; and evolution of the business model. Its objective is to begin drawing up a global map of the main operators in the podcasting industry and to continue identifying world production, distribution, and marketing trends that generate the necessary measurement indicators to observe and compare the dynamics that currently occur on the markets, so that we can describe and analyze models from various parts of the world, even different models in the same country.

The market trends observed in the value frequencies taken in the observation process for each platform contrasted in a second stage with the discursive construction of the directors of the selected platforms. Using a semi-structured questionnaire covering the three levels of analysis (podcast production, distribution, and marketing), six interviews were conducted with the aim of obtaining first-hand insights on the trends observed in the empirical data. The individuals to be remotely interviewed were selected by means of random probabilistic sampling among agents of each platform who are considered to have influence on their respective strategies (**Toro-Jaramillo**; **Parra-Ramírez**, 2006):

- Alejandro Vargas, Director of *Podway*;
- William Ospina, Director of *PIA Podcast*;
- Luciano Banchero, Director of *Posta*;
- Olallo Rubio, Director of *Convoy México*;
- Guido Lautaro Padín, Director of *Parque Podcast*;
- Andrés Ruzo, Director of *Puentes México*.

Their narratives would enable us to understand the strategies that radio networks and sound content platforms have adopted to address the creation and dissemination of podcasts. The analysis focuses on four categories: distribution strategies, business model, work routines, and audiences. The content analysis of the podcast platforms (**Barredo-Ibáñez**, 2015), the eventual hearing of the material and in-depth interviews (**Blasco**; **Otero**, 2008), allowed for a methodological triangulation of the detailed study of the fourteen platforms via the application of a systematized analysis protocol and the subsequent comparison of their experiences.

> Methodologically, this research identifies, describes and systematizes the main models of production, distribution and marketing of the podcast in fourteen networks located in seven countries, based on the indicators corresponding to each level

4. Results

In order to achieve certain standardization in the sample selection, the fourteen platforms chosen are based on similar experiences and models and have spent time developing an accumulative offer in the emerging podcast market. The US *PodcastOne* is the oldest (2013). It is followed by *Puentes* (Mexico), *Posta* (Argentina), and *Acast* (Sweden) in 2014. *Convoy* (Mexico) was founded in 2015, while *Podium Podcast* (Spain), *Parque Podcast* (Argentina), and *Binge* (France) were established in 2016. Recently created podcasts are the Colombian *PIA Podcast* (2018) and the French *Sybel*, the Danish *Podimo* (which arrived in Spain the year after it was created), the Colombian *Podway*, and the US *Luminary Media*, all in 2019.

Following the levels established in the research methodology, the results of the analysis show different trends regarding the production processes, content distribution methods, and the business model of the analyzed platforms.

4.1. Production process

The production of content is focused on three actors within the corpus study:

> "own content material, pieces from commercial clients and initiatives with independent producers that approach us looking for a place to upload their content" (William Ospina, Director of *PIA Podcast*),

as the main challenge is having a large catalog with an offering of original content. The work modality brings together

> "radio personalities, script teams, screenwriters, and technicians, that join the administrative and financial area to offer a service model like any other start up" (Alejandro Vargas, Director of *Podway*).

Sound production has stopped being identified only with the technical procedures that affect product design to consider all the creative and design strategy processes of this content. The complementary nature of the processes covers aspects such as the frequency or duration of productions, among others.

Table 4. Content production variables

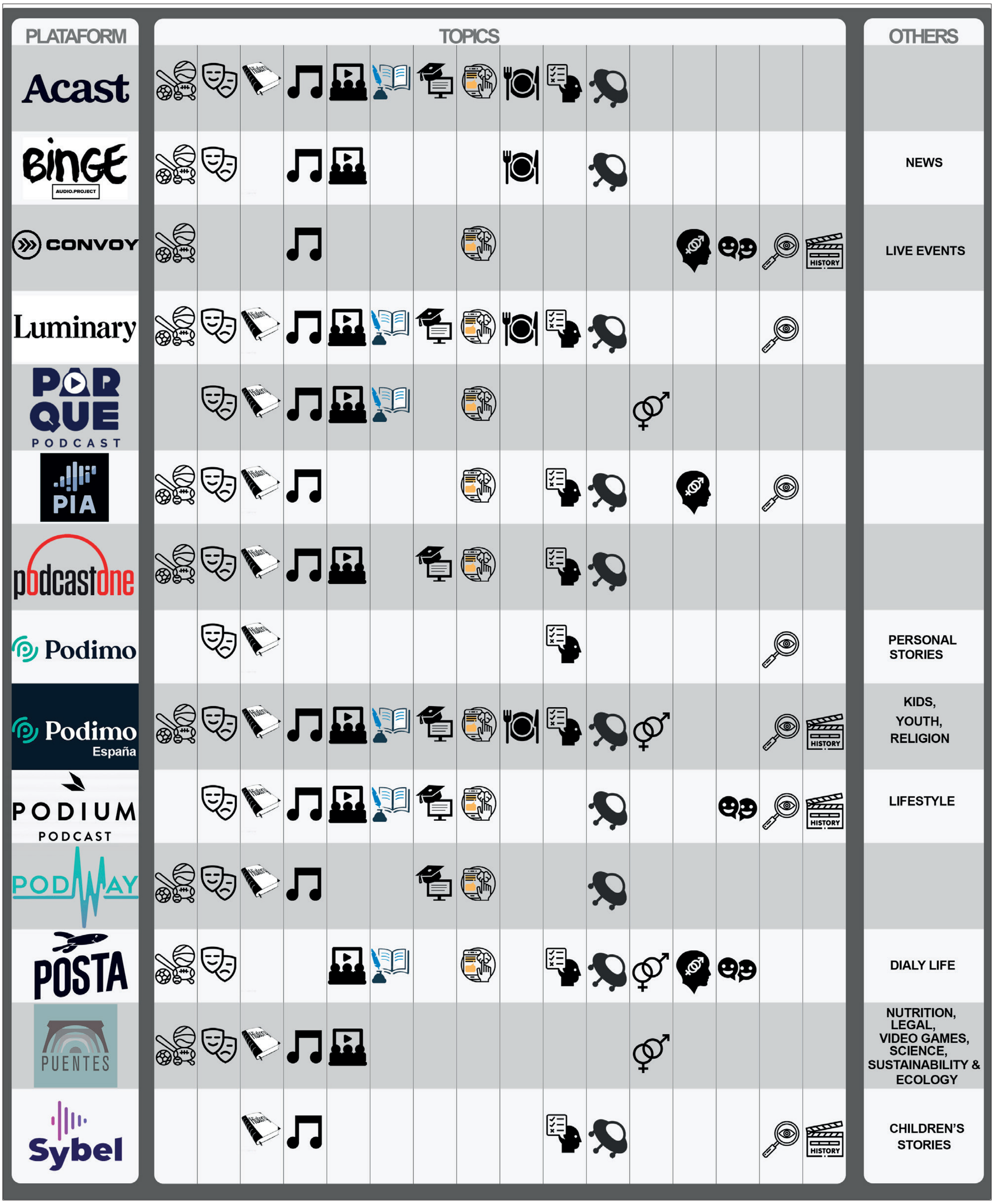
Production origin	Section and subjects	Interaction routes	Renewal of content
Own production only	Sports, Culture, History, Literature	Daily	5 to 10 minutes
Accommodates radio broadcaster content	Music, Cinema and Series, Education	Weekly	11 to 30 minutes
Accommodates content from other producers	Technology, gastronomy, self-help	Monthly	31 to 50 minutes
Accommodates amateur content from their listeners	Fiction, Mystery, Other…	Complete season / Production discontinued	More than 50 minutes

Ten out of the fourteen platforms declared they have a dynamic content production. 43% (six out of fourteen) produce and host only their own material: *Puentes*, *Convoy*, *Posta*, *Parque*, *PIA*, and *Binge Audio*. The three that do not have their own production infrastructure (*Acast*, *Sybel*, and *Luminary Media*) base their content offer on other producers. In seven of the fourteen recorded cases, two or more content production methods are observed. In addition to their own, we see content from other producers, content produced by radio broadcasters and even, in the case of *Acast*, *Podimo* Denmark and Spain, those produced by members of the community. Only three platforms show disruption in their content model: *Podway* –hosts episodes with distribution schemes– and *Podimo* Denmark and Spain, which created their own revenue share system: exclusive to the platform, 50% share of revenue; and non-exclusive, 20%.

In terms of the frequency of content renewal, the majority renew content weekly. Ten out of fourteen produce weeklies. However, it should be mentioned that half of those analyzed also produce content daily. Fortnightly production (four out of fourteen), and complete series (four out of fourteen) are less frequent, while the Mexican podcast, *Puentes*, and the Colombian, *Podway*, are produced monthly. The Argentinian podcast, *Parque*, has sometimes produced intermittently. Analyzing the average duration of the content hosted by the different platforms, it is clear that podcasts of 31 to 50 minutes dominate production. *Parque*, *Podimo* (Denmark and Spain), *Sybel*, and *Podway* most frequently produce shorter spaces of 11 to 30 minutes. *PIA Podcast* is the only podcast with an average duration of five to ten minutes, while on the American *PodcastOne* longer podcasts that exceed fifty minutes predominate.

Table 5. Categorization by platform

Sports	Culture	History	Music	Films and TV Series	Literature	Education	Technology
Food	Self-help	SCI-FI	Gender	Sexuality	Humor	Mistery	Documentary



Regarding the topics on which content is based, it is interesting to note that *Podimo* Spain, one of the youngest, is the podcast with the most diverse topics, producing content in practically all the categories established in the research, except for the sexuality and humor categories. The most popular spaces are those related to music, produced by twelve out of fourteen; eleven out of fourteen have culture and history; sports, technology, and fiction are presented in ten out of the fourteen analyzed. Films and television series podcasts are produced on nine of the platforms studied, self-help matters on eight, mystery on seven, and literature and education on six. The least frequent are gastronomy, gender, and documentaries (four out of fourteen), and sexuality and humor (three out of fourteen). In this section, it is also interesting to note that this study has taken account of the topics that are subjects of specific content on the platforms, diversifying the topics offered and under the epigraph "other". These topics range from stories for children, nutrition, law, video games, science, sustainability, ecology, daily life, youth lifestyle, religion, personal histories, coverage of events, news, and current affairs.

> Audiences formed in communities require guiding efforts to manage cores of people who identify with a common goal, increasing the lifespan of each content in the digital sonosphere

> "What we did was make contacts with cultural or research journalists or music artists, sports, gastronomy, and tourism specialists, and we proposed that they create specific content in their specific area of knowledge in podcast format. We were going to turn this content into a series that was going to have a certain continuity that would have been built on an aesthetic line, on a concept" (Guido Padín, Director of *Parque Podcast*).

4.2. Distribution process

The spread of digital devices for the consumption of online audio and the increase of audiences searching for personalized content with which to interact as a prosumer has led to the global surge in the last decade of these podcast platforms that have revolutionized the sound world.

> "Sixty percent of our audience listens to us on *Spotify*, 25% on *Apple Podcasts*, and the rest is quite evenly spread between the web and the rest of the listening applications. We are on all the content distribution platforms, but we take this metric as an example that people are trying to tell us something" (Luciano Banchero, Director of *Posta*).

The formulas that seek to interact with users are multiplied, enabling access to content, and looking for specific targets to create listener communities.

Table 6. Content distribution variables

Distribution channels	Social media profiles	Interaction routes	User profiles
Only platform, and own website	*Facebook*	Social media	Young people with high cultural level
Own platform, and social media	*Twitter*	Web or mail	Young and alternative
Own platform, and app	*Instagram*	Events, competitions, other activities	Not only young people
Own platform, and other aggregators	Personal profiles of platform managers	Other	Mixed
Own platform, other platforms, and social media	Others		

Eleven out of the fourteen cases choose multiple channels to get their content to users and to do so via their own platforms/websites, using other platforms, or audio aggregators such as *Spotify*, *Apple*, or *Spreaker*, and with the habitual and continued use of social networks for this purpose. It is worth mentioning that the majority of them (eight out of fourteen) do not have their own app to download into mobile devices arguing that –among other things– they are not very efficient for distribution:

> "the world of applications is very cruel and savage. Moreover, you release an application and on average only 3% of those published survive two months and of these 3%, only 1 percent survives six months, so unless it is a super addictive game or backed by something that will offer you things beyond the application, I think it is not worth it unless you have something extra to offer" (Andrés Ruzo, Director of *Puentes Podcast*).

The platforms analyzed that have their own app (*Convoy*, *Podimo* Denmark and Spain, *Luminary Media*, and *Acast*) coincide almost entirely with those whose business model is subscription. Of those who distribute their podcasts via other platforms or audio aggregates, none uses *Spotify* only. Likewise, all of them have social networks as a window and promotion for their content.

The most used social networks are *Facebook*, *Twitter*, and *Instagram*. In fact, the fourteen platforms have a profile or fan page on the three networks, interacting frequently and actively with listeners. *Acast* and *Sybel* also have *LinkedIn* or *Soundcloud* profiles. In this section, it is interesting to highlight that many of the content managers, professionals, or drivers use their personal social network as a promotion window for the platforms. Cases in point are *Acast*, *Puentes*, *Parque*, *Posta*, *Convoy*, *Podium Podcast*, *PIA Podcast*, *Podway* and *Binge*, whose resources include radio personalities, actors, producers, and people famous in the field of communication. They have thousands of followers on their personal accounts and are the best windows of access to listeners.

The fourteen platforms use social networks not just as a content distribution route, but also as the most frequent and direct communication channel with their user communities, although all of them except *Podium Podcast* also use email or the web as routes to interact with listeners. *Parque*, *Convoy*, *Podium Podcast*, *Podimo* Denmark and Spain, *Binge*, *Podway*, *PIA Podcast*, and *PodcastOne* go beyond the general formulas of interaction, with activities including events, competitions, and other occasional formulas of interaction more closely related to the feeling of belonging to a community and that allow –in addition to the interaction between the platform and user– contact and relationships among community members. In the case of the French podcast *Binge Audio*, it also programs sessions of early listening of content for clients.

In terms of the listener profile of each of the platforms that make up the study corpus, it can be said that half of them have a majority of young users, differentiating among them those with a high cultural profile –the Mexican podcast *Puentes*, the Argentinian podcast *Parque*, and the French podcast *Binge*– and those that are content users with a more alternative concept, such as the Mexican *Convoy*, and the French *Sybel* and *Binge*. In the cases of the Nordic *Acast*, the Argentinian *Posta*, the Spanish *Podium Podcast* and *Podimo*, and the US *Luminary Media*, their listener profiles are more varied. The Colombian podcasts *Podway* and *PIA Podcast* have an audience that is

> "very young, from 12 to 15 years. We have a large audience in schools and universities. Adults living in these times are also very curious about sound content" (William Ospina, Director of *PIA Podcast*).

This situation is diametrically opposed to the Danish *Podimo* and the US *PodcastOne*, which have majority adult audiences.

4.3. Business model

The third level of analysis established by the research methodology refers to the business model and the ownership structures that the online podcast platforms represent in the world, a phenomenon with a growing extension and impact considered by many as heir to the broadcast radio. It is interesting to know whether changes in the production and distribution of sound content are now affecting traditional business models and if these need to give way to other product-monetization strategies given the reality of the emergence of new models that alter the value chain.

> "The customers are the ones who pay, not the brands. *Convoy*'s engagement with its audience is impressive and many people have joined us just because of this. Maybe we are not so loud, but we have people who listen to us very closely every day" (Olallo Rubio, Director of *Convoy*).

Table 7 shows the analyzed variables in the business models of the chosen platforms.

Table 7. Variables regarding business model

Ownership structure	Content monetization	Advertising forms	Change of model over time
Independent project	Advertising only	Advertising mention	Yes
Linked to a media	Subscription to catalog	Sponsorship	No
Coalition of producers	One-part subscription and premium version	Branded content / Podcast content	
Other	Pay-per-listen for each podcast	Others	
	Crowdfunding / others		

A third of the cases analyzed have modified their business model in the years accounted for. This is the case for *Acast*, *Puentes*, *PIA Podcast*, *Podway*, and *PodcastOne*. Except *Podium Podcast*, the first podcast network in Spain whose ownership structure is related to *Prisa Radio*'s *Cadena SER*, and *PIA Podcast*, a business unit of Colombia's *WV Radio*, in the majority of cases, the rest arose from independent projects founded by various partners. In the case of the Argentinian *Posta*, it also functions as a producer of outside podcasts, for other means of communication or brands that need it.

There is more variety in the cases if we take an in-depth look at the way in which each podcast monetizes its content and makes its work profitable. Five of the fourteen platforms follow the traditional advertising-only funding system: *Puentes*, *Posta*, *Podium*, *Podway*, and *PIA Podcast*. Meanwhile, those such as *PodcastOne* combine monetization through advertising with *Spotify*-style premium subscriptions, or like *Acast*, which has some crowdfunding proposals together with the advertising model. The next most numerous case of economic profitability from production in the study sample is the prepaid monthly subscription for access to the entire catalog. *Convoy*, *Sybel*, *Podimo* Denmark and Spain (including with the premium version), and *Luminary Media* –the latter three some of the most recently created (in 2019)– have all chosen subscription to monetize their podcasts, while the Mexican *Convoy*, the oldest, was pioneer in getting listeners to pay in advance to consume its catalog. Cases apart with different business models are the Argentinian *Parque*, with a free access catalog, but with a crowdfunding production, and the French *Binge*, which is more complex and has a mixed funding formula.

Table 8. Monetization of content by platform

Monetization	Advertising	Catalog access by subscription	Advertising and premium	Subscription and premium	Pay-per-listen	Crowdfunding	Others
Acast	x					x	
Podimo		x		x			
Puentes	x			x			
Parque						x	
Posta	x						
Convoy		x					
Podium	x						
Podimo España		x		x			
Sybel		x					
Binge							x
PodcastOne	x	x					
Luminary		x					
PIA Podcast	x						
Podway	x	x					

Entre las plataformas que se financian con la inclusión de publicidad en sus espacios, no existe una única fórmula para insertar la información comercial.

> "Hay varios formatos, pero trabajamos con una lógica de agencia, trabajamos la creatividad de los contenidos de marca caso por caso, no vendemos un paquete genérico de auspicios ni nada de eso, o sea nos sentamos con el potencial cliente, escuchamos cuáles son sus necesidades, a qué público quieren apuntar y alrededor de eso armamos una propuesta" (Luciano Banchero, Director de *Posta*).

En el análisis del corpus de estudio se encontraron: menciones dentro de los podcasts (6 de 14), patrocinios exclusivos de series o capítulos (7 de 14) y producción de contenido de marca (5 de 14), en la mayoría de los casos la fórmula no es única y entre aquellas que usan la publicidad comercial para asentar su modelo de negocio, es común la hibridación de las tres fórmulas mencionadas. En el caso de *Puentes*, se han observado cuñas pre y post contenidos.

Among the platforms that are funded through the inclusion of advertising, there is no single formula for inserting commercial information.

> "There are various formats, but we work with the logic of agency. We work with the creativity of brand content on a case-by-case basis. We do not sell a generic sponsorship package or anything like that. In other words, we sit down with the potential client, we listen to what their needs are, the audience they want to target, and based on this we create a proposal" (Luciano Banchero, Director of *Posta*).

The study's corpus analysis found mentions within podcasts (six out of fourteen), exclusive sponsors of series or episodes (seven out of fourteen), and production of brand content (five out of fourteen). In the majority of cases, the formula is not unique and, among those that use commercial publicity to solidify their business model, the use of a hybrid version of the three aforementioned formulas is common. In the case of *Puentes*, pre- and post-content spots were observed.

5. Conclusions

Although the indicators used for this exploration of the fourteen podcast networks analyzed in this study allow for different levels of analysis, the results can be summed up in some key points related to the initially proposed challenges:

1. Achieve a coordinated multi-channel broadcasting of content and find new ways to monetize it beyond the analog radio business model. In this vein, more differences are found in the marketing of podcasts than in the typology and variety of the content analyzed. In other words, the study platform catalogs all offer a wide repertoire of titles, genres, and topics, showing that, on the one hand, digital content platforms need variety in their catalogs to meet the demands of their users and, on the other hand, podcast production across the world is based on recognizable and standardized categories and containers. Unlike in the sound industry *par excellence* (the radio), advertising is no longer the sole source of funding for podcast platforms, which (following increasingly differential on-demand video platforms) choose new subscription and monetization formulas in exchange for added content (in the case of *Acast*) or for access to direct sound content (in the case of *Convoy*).

> Podcast aggregation platforms help to address some of the major weaknesses of the format in the context of competition for attention and time in the digital ecosystem

With the aim of standing out and, above all, justifying the subscription when chosen, the catalogs of all the platforms analyzed include exclusive content, apart from production (which in the majority of cases is its own production). This is a factor that is tending to become

> The personalization of the sound diet and the way of arriving at audio democratize sound in the digital ecosystem, an environment where the podcast generates greater closeness with the user/producer and/or consumer

a strategy as a result of the competition introduced by audio platforms such as *Spotify*, whose catalog has started to include more and more titles accessible only to their users. As **Arense-Gómez**, **Terol-Bolinches** and **Pedrero-Esteban** (2019) conclude, in the digital scenario, the audio listeners' experience is not only conditioned by the contents offered or by the design and usability of the platform interface, but also by its labeling (metadata) and its thematic classification. In the case of podcasts, and given their projected expansion through music streaming services, the categorization of content is a major element that enables associating it with the consumption profile of each user and incorporating them into their menus through recommendation algorithms. In this sense, platforms help to get to know the audience better, a key factor for the success of the subscription and for monetizing the podcasts, not to mention the boost for the advertising and electronic business sector.

2. Achieve the convergence of the semiotics of sound with other textual, iconographic, and visual multimedia elements. It is clearly necessary for them assist in discovering content, increasing listening time and improving user satisfaction with audio, whose mobility, compatibility and integration of new devices and media is gaining ground in this sphere. User expectations are improved, the listening experience is satisfactory, and this habit is reinforced, favoring readiness to receiving advertising suggestions.

3. Working on new metrics that account for scope and specific consumption, and their visualization on social networks. The platforms analyzed convert them into a tool for content distribution and advertising in which they are not just a route towards recipients, but are considered an interaction strategy that returns feedback from users and listener communities. Interaction becomes constant and up-to-date. The platforms incorporate technological tools for helping to discover content (*Google Assistant Podcasts*), interact with content (*Spotify* surveys), and to favor multi-channel consumption (including voice interfaces).

The environment of the platforms is leading to an operational strategy that places the user in control of consumption and blurs the effort for linear consumption as is traditional for radio or television; the essence of the broadcast model where personal and asynchronous on-demand content reigns, and where correlation between culture and technology is enhanced. Atomization in the offer of devices and applications becomes an opportunity for funding metrics in line with crowdfunding and subscription.

4. Incorporation and recognition of new professional profiles in the sound industry. From this point of view, the analysis shows that emphasis is placed on the creative processes, incorporating into the production specialists, investigators, artists, and freelancers that produce specialized content within the catalog labels. In addition, there are scriptwriters and technicians to complement the more technical procedures. Competition between platforms contributes to boosting innovation, creativity, improvement in product quality, and the incorporation of popular or famous professionals. This movement multiplies in cases that incorporate a payment method.

Podcast aggregation platforms contribute to resolving one of the main weaknesses of the format in the context of competition for attention and time in the digital ecosystem. The monetization of podcasting is focused on a range of options: advertising, subscription, direct sale of event tickets, sales of merchandising related to successful podcasts, content marketing, sponsorship or even donations via crowdfunding. Overall, and despite this more or less varied range, the formulas that have been established to date with a certain recurrence are subscription payment and advertising revenue, whether combined or separately. Regarding the advertising revenue generated by podcasts consumption, this is still low in comparison with other, older media, such as radio.

Finally, the aforementioned increasing competition (strong investment in *Spotify* is joined by the future expansion of *Audible*, the division of audiobooks and sound series in *Amazon*) is shown to be an opportunity for the strategic differentiation of the platforms, which, just as on-demand video, can choose to produce and boost local content or content directed at internal markets, or broadly directed podcasts, leveraging the potential of Spanish and English for audio consumption in large markets.

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