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The Challenges of Podcasting Platformization: Exploratory Analysis on Podcast Audiences and the Transition to New Competitive Structures

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Abstract — This paper aims to reflect upon the origins of Podcasting and to place the format's contemporary relevance within wider market shifts towards platformed business models. Platforms have been rapidly evolving, absorbing previously untouched spheres such as the news or entertainment industry. Being data-oriented structures, we materialize in this contribution the underlying threat platformization may pose to genetically open ecosystems such as the podcasting sphere, exploring the cultural, technological and managerial implications.

Presented reflections were supported with global data on podcast usage from the 2019 and 2020 editions of the Reuters Digital News Report from the Reuters Institute for the Study of Journalism. Analyzed data corroborates the massification/normalization of podcasting, both in the whole sample and younger audiences, with podcast listeners having an overall positive view of the format when compared to other media.

While underlining the specific changes platformization may cause to Podcasting, we suggest that much can be learned from the experiences of other media spheres. The disruption

caused by infrastructural changes to content ecosystems cannot be avoided but may be predicted through efficient managerial decisions and the safeguard of both established brands in the market as well as smaller, innovation driven, and independent producers who were and still are vital to the wealth of the Podcasting ecosystem.

Keywords — Podcasting, Podcast, Platformization, Disruption.

1. Introduction

The term Podcasting, which Bottomley (2015) defined a few years ago as the new audio medium that gained its roots back in 2000 and came of age in 2005, has been evolving through the years, referring to “both a process and a practice, operating as both a verb and a noun” (Berry, 2019, p. 1) as it encompasses both a specific kind of media production as well as a form of content distribution with audio (or video) files being distributed online using RSS (Really Simple Syndication) to subscribers, a decentralized architecture predating social media or cloud storage (Sullivan, 2019). Having emerged at the beginning of the 21st century as a new instance of listening (Morris & Patterson, 2015), outside social media or cloud-based structures, podcasting has since been a rather unique and curious sphere of content production and distribution, as well as audience building, where independent creators live side-by-side with legacy brands and players who saw in the medium the opportunity to quickly distribute their content digitally. According to McClung & Johnson (2010, p. 83), “While podcasts were initially created primarily by amateur producers [podcast users tend to be active social networkers who belong to Facebook and MySpace (Webster, 2008, apud McClung &

Johnson, 2010)], mainstream media has also recently joined in by providing a variety of podcast content”.

However, exponential growth is attracting new players, on a much bigger scale. With Joe Rogan signing a \$100M deal with Spotify to distribute his popular The Joe Rogan Experience show, the Podcasting phenomenon gains unprecedented market relevance, with some questioning whether this form of media has finally turned mainstream (Weiss, 2020) and the issue of platformization becoming central to any discussion regarding Podcasts.

While it may be exaggerated to refer to podcasting as revolutionary or as an abandonment of traditional broadcasting, it may be understood as the materialization of an “alternate cultural model of broadcasting” (Sterne et al. 2008) that may bring benefits not only to the news and entertainment spheres but also to the educational and medical fields. (Campbell, 2005; Zanussi et al., 2011). Simultaneously, Podcasts, especially public-purpose ones, have “created a unique and uniquely valuable space of public discourse in the pre-commercial phase of podcasting” (Aufderheide et al, 2020, p. 1697).

Regardless of genre, Podcasting has established itself as the intersection of culture and interpretation and can be seen as an innovation in terms of the usual media narratives. (Zelizer, 2017). Also, in the fast-changing media environment, podcasting is a media concept and product much related to the innovation and revolution in the media value chain, namely because of the platformization (new intermediaries), consumer behaviour, or business models (Deuze & Prenger, 2019), without forgetting the trend (or need) to reinvent media contents as entrepreneurial enterprises (Singer, 2017) in the path towards a sustainable model for systemic innovation. (Posetti, 2018).

To conduct this research, the following research question was elaborated: RQ1 – what are the systemic implications of

recent structural changes to the podcasting sphere? We aim to offer a response by crossing a wide spectrum of theoretical contributions as well as recent figures from several markets around the world.

This article brings extra knowledge to studies on podcasting, which continues to constitute an area of study not fully explored, an aspect denounced by Chadha, Avila & Gil de Zuñiga in 2012 that still holds true. The authors refer for example that little is known about podcast users and their role within democratic societies. In this article we corroborate this contribution, adding that platformization makes it an even more pressing matter.

2. Literature Review

Permanent reconfiguration and reshaping have become a staple of the media ecosystem and its underlying economic structures, particularly regarding production, distribution, and content reception (Cardoso, 2006).

Digitalization, as a principal-agent of globalization (Giddens, 1991, 2000; Bauman, 1998), claims a leading role in new systemic integration processes centred on the close relationship between technology and society (Castells, 1989, 2002) with particular impact on the way humans relate to one another (Carroza, 2018).

With digitalization at the core of a new economic order, disruption became an integrating aspect of transformation in the media sphere. Galloway 2005 (apud Bonini, 2015) mentions the underlying disruptive component of the Podcasting phenomenon, as a “peripheral technology” that allows the distribution of radio content without the need for traditional broadcasting and communication structures, while Croft et al. (2005, apud Bonini, 2015) underline the transitional aspect of massified radio

broadcasting towards the personal media and on-demand universe.

Berry (2006) defines Podcasts as communicational artefacts, converging audio, web structures, and portable devices, three central elements for human communication frameworks in the XXI century. In his seminal work “Will the iPod kill the radio star?” the author prophesized the survival of Podcasting as a concept, beyond the demise of the iPod and the MP3 player, by migrating to personal and highly connected communication devices such as the smartphone. However, McHugh (2020) underlines the importance of the cultural side on Podcasting becoming an industry, on pair with the technological progress, two key developments that should not be separated, while Knoblauch (2014) states that “podcasting is powerful not only because it has the ability to relate complex arguments into digestible bits of information, but also because it can transform those arguments into relatable stories”.

On the technology side, the embedding of podcasting app/software in its core system by Apple allowed millions of users to access a wide range of content, both in quantity and in quality. Culturally speaking, the release of Podcasts such as “Serial” (2014) – that Berry (2015) defines as a historical landmark and the precursor of a Golden Age of Podcasting – resulted in a “seismic cultural shift that introduced millions to the Podcast format” (McHugh, 2020, p. 7). Through the creation of both a new reception framework and new audiences, Podcasting paved the way for potential genre diversity and new forms of inclusion (Hugh, 2020, p. 9).

In their maximalist proposition, McClung & Johnson (2010, pp. 93-94) concluded that podcast users are a highly desirable demographic who rely on podcasts for a number of reasons: entertainment, time shifting, library building, and social aspects.

Despite the acceptance of Berry's (2006) proposal on the importance of culture and technology to this discussion, Bonini (2015) argues that economic variables must also be considered to fully understand the transformation of Podcasting into a profitable / commercially productive activity and, ultimately, into mass media, a transformation mostly driven by business model innovation that allowed for the sustainability of smaller independent structures – a process the author describes as the “second age of podcasting” (Bonini, 2015). Among other aspects, Bonini (2015) attributes the massification of podcasting to several independent yet interacting factors: the democratization of smartphone devices (as well as the appropriation of new forms of communication and interactivity linked to portability), the popularity of micro-patronage and alternative funding systems (such as crowdfunding and others) and the development of audio related social networks (preceding social media giants such as Facebook, Twitter, etc.). Combined, these aspects contributed to the development of technologically literate and potentially connected audiences which, due to exponential growth, quickly became financially relevant as a whole independent market. Social media is a “group of Internet-based applications that build on the ideological and technological foundations of Web 2.0 and that allow the creation and exchange of user-generated content” (Kaplan & Haenlein, 2010, p. 61; Kaplan, 2015, p. 197). Aside from the original amusement purpose for younger demographics, social media became an overwhelming marketplace for business. Issues such as data-ownership and consumer tracing invaded the corporate sphere as a consequence, bringing along both risk and opportunity. While social media and platforms, in general, have undoubtedly brought opportunities for business and innovation in business model creation, they have also exposed creators, distributors (and consumers) to new risks and challenges (Kaplan & Haenlein, 2010).

Recent industry consolidation through platformization poses significant challenges to a previously decentralized production, distribution, and consumption environment, now enriched not only by traditional professional structures such as radio broadcasters, journalists, and educational institutions but also by independent and decentralized content producers (Benkler, 2006), artists, and non-professional actors (Bonini, 2015). The diversity of agents who resort to Podcasting as a medium of production and distribution is a relevant aspect of these rapidly evolving broadcasting structures as it promotes a rich and thematically diverse content environment, previously untapped by high-density agglomeration structures which, in other consumption frameworks, have been known to homogenize available content, consumer desire, and practices. Referring to the music industry, Hughes (2003) underlines the media spheres' vulnerability to the concentration of "power and wealth in just a few conglomerates that simultaneously compete and collaborate" with growing leverage over "institutional decisions and public opinion (Hughes, 2003, p. 187).

Plantin et al. (2018) go further in the digital / web related study field, by analyzing theoretical frameworks related to both "infrastructure" and "platform". Both concepts relate to structures that are the underlying support for something relevant in the digital world, but infrastructure studies and platform studies have at their basis very different theoretical and genetic builds (Plantin et al., 2018). However, and despite those differences, the analysis of case studies such as Google, Facebook, or the Open Web may benefit greatly from complementary theoretical frameworks based on these two propositions. Despite their genetical differentiation, the authors explore the close links between both concepts throughout the development of the connected world: since the 1970s, systemic competition gains through cost reduction/profit increase benefited heavily from the "platformization of

infrastructures” while, later on, it was the “infrastructuralization of platforms” that allowed companies like Google and Facebook (or Spotify, at a cultural level) to become contemporary equivalents of the railroad, telephone or energy supply monopolies from the late XIX century (Plantin et al., 2018, p. 306). At the strict economic or competition level, platformization threatens the balance between different scale competitors in any given market, promoting “winner-takes-all” market structures and shifting power balances in favour of already big sized players (Plantin et al., 2018).

Despite the centrality of platformization in the Podcasting sphere, this challenge is becoming relevant at a time when previously significant issues are still under discussion. Despite its most benign aspects, innovation through digital transformation may act as a disruptive force when turned into a market-wide trend which pressures all structures alike, regardless of their ability to handle sustainable change “with all the new opportunities and challenges emerging from the digital transformation, ignoring it puts organizations at risk of falling behind the competition.” (Muthuraman, 2020, 1100). Thus, growth potential can only be accomplished through “transformational changes” based on the solidification of strategic, leadership and organizational structures (Schwertner, 2017), adaptive resources that promote a disruptive digital and entrepreneurial ecosystem in which successful companies such as Amazon, Facebook, Google, Uber, Airbnb, etc. have thrived (Wåge & Crawford, 2020) but where smaller independent enterprises struggle to fulfil basic business needs such as production, distribution and audience measurement in heavily platformed markets.

Traditional funding structures such as advertising, a sector the whole media ecosystem relies on, are also threatened by platformization, with Podcasting being no exception, with many

challenges to its underlyingly diverse public sphere of content: “[platforms] threaten the growing advertising revenue that fuels public podcasting’s most interesting (and expensive) new productions, and they challenge the ability of a public Podcasting sphere to maintain itself” (Audferheide et al., 2020, p. 1697). Furthermore, the impact of platformization may implicate the loss of the media’s inherent collaborative structure, if not its destruction, with the migration of podcasts from a benign, open distribution RSS architecture to platforms whose business model relies on user/consumer data gathering (Audferheide et al., 2020). The genetic user freedom of Podcast usage is explained by Perks and Tollison (2019) in a four-factor analysis, comprised of “Controlling Edutainment”, “Storytelling Transportation”, “Social Engagement” and “Multitasking”, which the authors use to “demonstrate that podcasts enable listeners to connect to the world and the people around them – on the listeners’ own terms (Perks & Tollison, 2019, p. 630). The specificity of podcast usage, compared to other media, derives from the formats’ ability to “captivate audiences as well as expanding their minds” (Perks & Tollison, 2019, p. 631) through the exposure to new ideas as voiced by meaningful others in the social spectrum. At the same time, the formats’ “Storytelling Transportation” aspect refers to the immersive component of the experience, despite the light sensory engagement it implies. While Audferheide et al. (2020) highlight the negative implications of podcasting platformization, Perks & Tollison (2019) regard the “Social Engagement” factor as a positive incentive to “listener-to-listener engagement” as “social media can be particularly useful to connect with niche listener or fan communities” (Perks & Tollison, 2019, p. 631), a connected side that compensates for and provides additional meaning to an otherwise solitary experience. Similarly, Mou & Lin (2015) underline that the apparent and superficial solitude of Podcasting hides a very significant “social dimension through interpersonal

discourse” (Mou & Lin, 2015, p. 490) that becomes a deciding incentive for non-users to adopt podcasts.

The “Multitasking” factor mentioned by the authors relates to a rich universe of other tasks and activities that are not related to Podcasting, as a practice, but happen simultaneously, with the Podcast being mentioned as a productivity booster. Despite the rejection of linearity and disconnection? (Meserko, 2014), Podcasting remains intrinsically connected to traditional broadcasting, a structure that retains relevance regardless of evolutionary or revolutionary new formats (Geiger & Lampinen, 2014).

Back in 2010, Lawson-Borders (2010) questioned readers on whether a media reset was needed to start once again with new business models, with the readers quickly replying to her question by arguing that any effective business model would have to be a wider economic model. Ten years later, we have witnessed the reconfiguration of the digital world, the disruption of newsrooms, studios, broadcast structures, etc. The platformization of once untouchable (and seemingly eternal) forms of content distribution caused systemic changes, and the questions media managers and key stakeholders ask themselves are of the existential sort.

3. Methodology

The following exploratory analysis was conducted using data from the 2019 (38 markets, n=75749) and 2020 (40 markets, n=80155, Kenya and the Philippines were added) editions of the Reuters Institute for the Study of Journalism Digital News Report (RDNR). In both editions of the report, data was collected by YouGov in late January / early February (2019 – from January 24th to February 21st, 2020 – January 14th to February 17th),

therefore, fieldwork precedes the Covid19 pandemic and its impact on media practices and consumption.

Both samples follow the probability sampling criterion and were exclusively applied online to internet users, and are stratified on four factors: age, gender, education, and region, except for Greece, Turkey, Malaysia, Philippines, Brazil, Argentina, Chile, Mexico, Kenya, and South Africa, where only age, gender, and region stratification was applied.

Online samples tend to under-represent the consumption habits of people who are not internet users (typically older, less affluent, and with limited formal education). Therefore, overall RDNR results should be considered as representative of online populations who consume news at least once a month.

The main question we used in this analysis of the global Podcasting market was “A podcast is an episodic series of digital audio files, which you can download, subscribe or listen to. Which of the following types of podcast have you listened to in the last month? Please select all that apply”. By using a net aggregation for all podcast genres we were able to consider all respondents who listened to at least one podcast in the previous month regardless of genre.

Analysis was deepened by the comparison of general global and country samples with the respective “Under 35” (U35) sub-samples, as age appears to be a relevant factor in podcast adoption.

4. Results

The reason for the added focus on Podcasting in the Reuters Digital News Report lies in the relevance of the format for information purposes. Overall, podcast usage grew by 4 percentage points (pp) in a single year, between 2019 and 2020,

with Brazil (+8,5 pp), Poland (+7,3 pp), South Africa, Turkey (both with +6,8 pp) and Romania (6,1 pp) leading.

National U35 populations show considerably higher adoption rates when compared to the general sample (+7 pp). Younger audiences appear to be growing at a faster rate in the Netherlands (+15 pp), Portugal (+12,7 pp), Australia (+11, 7 pp), Romania (+10,9 pp), and urban Brazil (+10,0 pp). However, the proportion of podcast users is considerably higher in Turkey (urban, 85,5%), Kenya (69,8%), Mexico (61,1%), Brazil (59,6%) and Bulgaria (59,1%). On the opposite side of the spectrum, we find the UK, where only about 20% of the population listened to a podcast in the previous month, with Germany, Japan, France, Netherlands, and Belgium following closely.

Table 4.1: Podcast Usage in the Previous Month per Market / Global, General Country Samples / U35, 2019 & 2020

	General Sample			U35		
	2019	2020	Var. 2019/20 (pp)	2019	2020	Var. 2019/20 (pp)
Argentina	31,1%	34,1%	3,0	38,9%	42,1%	3,2
Australia	27,0%	32,5%	5,5	43,2%	54,8%	11,7
Austria	31,5%	28,4%	-3,1	48,5%	49,1%	0,6
Belgium	22,6%	26,3%	3,8	42,4%	48,6%	6,1
Brazil	51,1%	59,6%	8,5	59,1%	69,0%	10,0
Bulgaria	55,8%	59,1%	3,3	63,0%	69,3%	6,3
Canada	29,0%	32,8%	3,8	45,9%	52,5%	6,6
Chile	37,6%	41,2%	3,7	43,9%	47,6%	3,7
Croatia	37,0%	38,5%	1,5	45,8%	51,6%	5,9
Cz. Republic	37,4%	39,0%	1,6	48,2%	55,6%	7,4
Denmark	24,2%	28,3%	4,1	45,5%	51,3%	5,8
Finland	25,6%	29,2%	3,6	43,0%	52,1%	9,0
France	24,8%	26,1%	1,3	41,1%	42,3%	1,2
Germany	21,1%	23,9%	2,8	37,9%	46,6%	8,7
Greece	35,7%	37,1%	1,4	53,0%	58,8%	5,8
Hong Kong	53,3%	55,4%	2,1	61,5%	61,1%	-0,4
Hungary	31,7%	35,2%	3,5	45,8%	54,6%	8,8

Ireland	37,1%	39,7%	2,6	59,9%	63,7%	3,8
Italy	30,3%	31,7%	1,4	44,3%	47,8%	3,5
Japan	23,3%	24,2%	0,9	31,2%	33,8%	2,6
Kenya*	-	69,8%	-	-	70,3%	-
Malaysia	41,7%	47,2%	5,5	49,6%	58,6%	9,0
Mexico	56,5%	61,1%	4,7	62,8%	66,9%	4,1
Netherlands	20,7%	26,1%	5,4	43,3%	58,3%	15,0
Norway	30,7%	35,9%	5,3	52,2%	59,5%	7,3
Philippines*	-	57,2%	-	-	68,3%	-
Poland	37,9%	45,2%	7,3	54,3%	60,3%	6,0
Portugal	34,3%	38,4%	4,1	49,4%	62,1%	12,7
Romania	39,4%	45,5%	6,1	56,0%	67,0%	10,9
Singapore	27,8%	29,8%	2,0	34,8%	37,9%	3,1
Slovakia	43,4%	48,3%	4,9	55,9%	61,3%	5,3
South Africa	42,8%	49,6%	6,8	55,5%	62,4%	7,0
South Korea	52,9%	53,5%	0,5	58,9%	57,3%	-1,6
Spain	38,9%	40,7%	1,9	53,2%	55,3%	2,1
Sweden	34,9%	36,4%	1,6	57,1%	57,2%	0,1
Switzerland	30,1%	31,8%	1,8	45,6%	52,1%	6,4
Taiwan	37,5%	42,5%	4,9	45,8%	52,7%	7,0
Turkey	78,7%	85,5%	6,8	80,8%	85,8%	5,0
UK	20,6%	21,8%	1,3	37,8%	41,1%	3,3
USA	34,5%	36,3%	1,8	53,5%	57,7%	4,2
GLOBAL	36,1%	40,6%	4,5	50,3%	57,2%	7,0

Source: Reuters Institute for the Study of Journalism, Reuters Digital News Report 2019 & 2020. 2019 Base: Global=75749; Argentina=2006; Australia=2010; Austria=2010; Belgium=2008; Brazil=2013; Bulgaria= 2018; Canada=2055; Chile=2004; Croatia=2009; Czech Republic=2023; Denmark=2011; Finland=2009; France=2005; Germany=2022; Greece=2018; Hong Kong=2056; Hungary=2007; Ireland=2013; Italy=2006; Japan=2017; Malaysia=2101; Mexico=2015; Netherlands=2026; Norway=2013; Poland=2009; Portugal=2010; Romania=2004; Singapore=2033; Slovakia=2045; South Africa=2009; South Korea=2035; Spain=2005; Sweden=2007; Switzerland=2003; Taiwan=1005; Turkey=2074; UK=2023; USA=2012. 2020 Base: Global=80155; Argentina=2007; Australia=2131; Austria=2005; Belgium=2010; Brazil=2058; Bulgaria=2006; Canada=2002; Chile=2005; Croatia=2009; Czech Republic=2006; Denmark=2061; Finland=2050; France=2038; Germany=2011; Greece=2015; Hong Kong=2023; Hungary=2011; Ireland=2006; Italy=2015; Japan=2006; Kenya=2003; Malaysia=2013; Mexico=2023; Netherlands=2014; Norway=2010; Philippines=2019; Poland=2008; Portugal=2012; Romania=2017; Singapore=2014; Slovakia=2018; South Africa=2006; South Korea=2304; Spain=2006; Sweden=2091; Switzerland=2012; Taiwan=1027; Turkey=2017; UK=2011; USA=2055.

Higher usage rates for the U35 sub-samples in Turkey and Kenya suggest that high adoption in the overall population is mostly driven by the U35 population (over a third of the Turkish and Kenyan samples is U35, 36%, and 37%, respectively), with 85,8% of young Turks and 70,3% of young Kenyans having listened to at least one podcast in the previous month.

While higher rates of media adoption and consumption have been associated with higher literacy or technological proficiency (Livingstone, 2008; Quintanilha, Paisana & Cardoso, 2020), countries such as Japan, Denmark, Finland and Sweden situate themselves below the global average rates.

2019 data also suggests that while the portability aspect of the format may be true, almost 6 out of 10 podcast listeners (57,5%) used a podcast at home (suggested examples were while getting ready to leave, doing housework, ironing, cooking, etc.) with lower proportions of users saying they listened to a podcast on a public transport (24,3%) public transport (20,3%) or out and about (17,5%). Overall, 52,5% of users listened to a podcast while they were out, a proportion that falls short of the almost 60% who used one while at home.

The portability aspect of the media appears to be more relevant to the U35 population: 63% of U35's say they used a podcast while they were out (28,4% on public transport, 24,8% on private transport and 21,0% at work) with 51,9% still declaring they used the format while at home.

Exploring the motives that support consumption, 46,3% of respondents in the aforementioned selected markets sample say they use podcasts to keep updated/informed about topics of their interest, 39,0% for educational purposes and about a third (33,8%) to be entertained. Similar proportions justify their choice with the need to kill/pass time (24,9%), to wind down / relax (22,8%), and as a change from listening to music (22,1%). The entertainment side of the appeal is proportionately more relevant

to the younger audiences with almost 40% (39,5%) of U35's saying they use it to be entertained, 30,4% to fill empty time, and a quarter, 25,4% to relax. The proportion of young people who use podcasts to learn something is remarkably close to that of the general population (38,4% compared to the mentioned 39%), an interesting figure considering that U35's are more likely to still be completing their formal education and a suggestion that, regardless of its educational potential (Campbell, 2005), podcasting may not yet have found its way into traditional education structures. The aforementioned relevance of podcasting in entertaining younger audiences is perhaps made clearer by the fact that only 37,9% of young respondents say they use it to stay informed or updated, -8,4 pp than in the general sample (46,3%). In any case, and whether we consider the overall population or the younger audiences, response dispersion suggests that as a format, podcasting offers a multiplicity of incentives to consumers, regardless of location for its use.

Both the general global sample and U35 sub-sample tend to have an overwhelmingly positive view of podcasting compared to other media in terms of convenience linked to information, entertainment, range of covered subjects and perspectives as well as the provision of a deeper understanding of covered themes. However, U35 interviewees tend to have a more positive view of the format in terms of its ability to incorporate the news and entertainment genres (50,4% in the U35 sub-sample compared to 48,6% of respondents in the general sample).

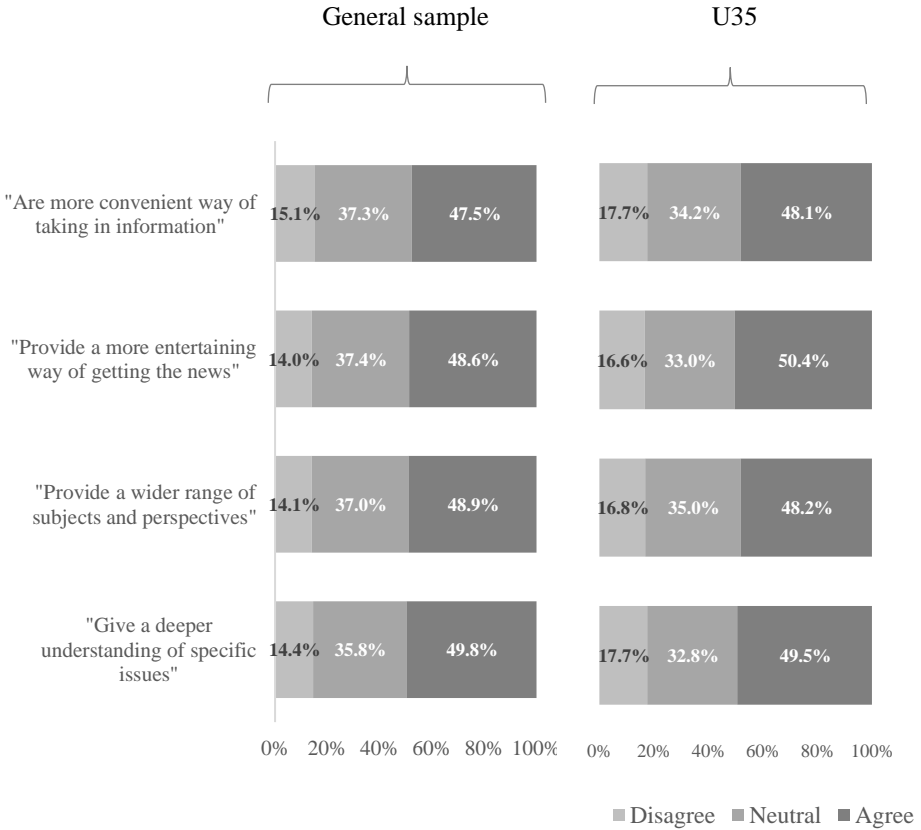


Figure 4.1: Opinion on Podcasts Compared to Other Forms of Media, 2020, Selected Markets

Source: Reuters Institute for the Study of Journalism, Reuters Digital News Report 2020, Selected markets. Base=12448 (Respondents in Australia; Austria; Belgium; Canada; Denmark; Germany; Ireland; Italy; Japan; Netherlands; Norway; South Korea; Spain; Sweden; Switzerland; UK; USA.)

Exploratory analysis of podcast sources showed platforms are extremely relevant when it comes to podcast usage. While Youtube, Spotify, Apple, and Google podcasts dominate the

spectrum, the websites or apps of news publishers/broadcasters appear in 5th place.

The diversity of resources that aggregate and distribute content is remarkable and suggests that the platformization of the Podcasting universe is still under development. Despite the weight of platforms such as Youtube and Spotify, other resources such as Pandora, Audible, Deezer, Podcast Addict, Castbox, and many others retain smaller yet significant shares of the market.

U35 users stand out in the use of Spotify (35,2%, 9,3 pp more than in the general sample) and Apple Podcasts, while respondents in the general sample are much more likely to access content using direct access to brands, a suggestion that younger users may be more used to platformed media environments. It should be noted that the proliferation of side access to branded content is itself a very significant contemporary issue in media studies, as it implies profit sharing between producers who have no other way of distributing content, and platforms that monopolize distribution.

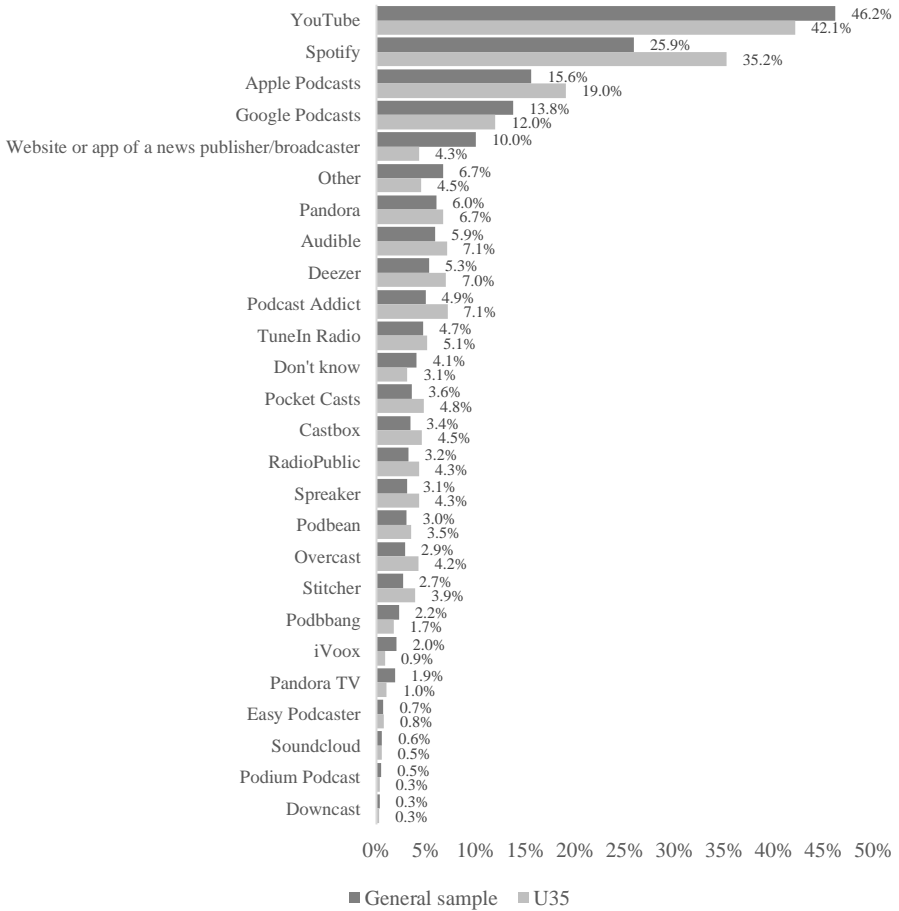


Figure 4.2: Podcast Sources, 2020, Selected Markets

Source: Reuters Institute for the Study of Journalism, Reuters Digital News Report 2020. Query question: "POD2. Which of the following apps or websites do you mainly use to find and play podcasts? Please select all that apply.", 2020, Selected markets. Base=7078 (Respondents in Australia; Austria; Belgium; Canada; Denmark; Germany; Ireland; Italy; Japan; Netherlands; Norway; South Korea; Spain; Sweden; Switzerland; UK; USA.)

The paradigm shift we discussed in the literature review is visible through reach comparison of podcasts (in the previous month) and radio news or programs (in the last week) with age.

Linear radio news programs have a significantly lower reach among younger listeners (20,6% among 18-24 and 25,5% among 25-34) than in higher age intervals with podcasts, as an on-demand format, already having considerably high reach among older listeners – 30,1% of 55-64 years old and 20,8% of 65 + years old listened to a podcast in the previous month. The comparison of different time intervals (in the previous months for podcasting and the previous week for radio news programs) does limit the scope of the analysis, with usage frequency being a key variable for future research, as well as other contextual factors that may determine the choice of on-demand vs. linear listening habits.

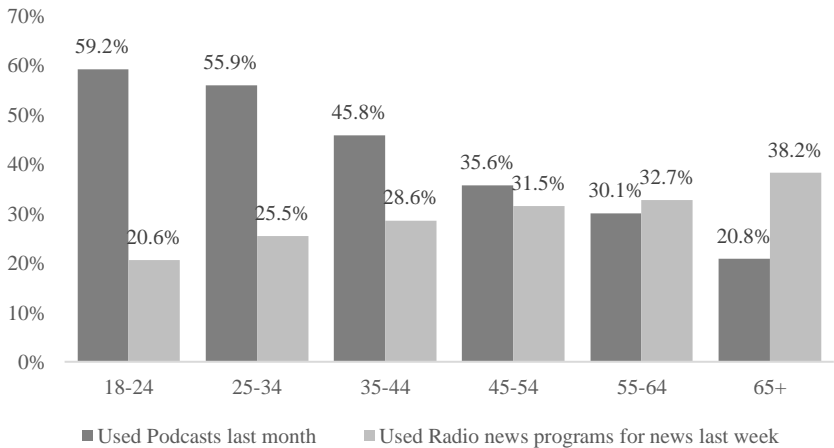


Figure 4.3: Podcast Usage (Previous Month) and Traditional Radio Usage for News (Previous Week) by age, 2020, All Markets

Source: Reuters Institute for the Study of Journalism, Reuters Digital News Report 2020. Global Base=80155

5. Conclusion and future research

By considering the present role of Podcasting in the wider spectrum of media formats, it should be noted that analysed data was collected before the pandemic crisis and therefore reflects a significantly different framework of practices. Despite being affected by this crisis, with a significant decrease in usage, recent data suggests podcasting is recovering (Quah, 2020). In spite of the much advertised mobile/portable aspect that presided the birth of the format, analysed figures imply that podcasting has found a place in listeners' homes and not only in on-the-go contexts. The growth of the Podcasting market is being fuelled not only by generalized use especially by a younger generation of listeners, socialized through platformed media structures, used to on-demand content, and heavily technologized environments.

With independent creators and legacy brands both becoming noticeable and the rise of relevant audiences, quality, and quantity-wise, platformization appears to be inevitable as are the challenges it carries along. Experiences from other media spheres, such as the news sector, may be useful to analyse and measure the evolution of the Podcasting sphere: first with the widespread paywall business model, later with the adaptation to highly connected distribution platforms that implied profit-sharing, the digital side of the news sphere became a highly standardized market, promoting winner-takes-all market systems that do allow for brands like the New York Times or The Guardian to succeed, but also for other smaller independent niche projects to perish in face of the inability to escalate to audience-driven projects.

One of the most attractive aspects of the Podcasting appears to lie in its diverse and considerably sized environment, that contains successful and established projects and startup niche endeavours

side-by-side in an equally diverse landscape of sources and distribution structures.

Mapping the different skills and mindsets entrepreneurs must equip to deal with today's media environments, Dal Zotto & Omidi (2020) speak of "a multi-paradigmatic lens within an industry such as the media, which is more and more merging with the technology-driven data industry." The issue of data is becoming increasingly relevant, as it will promote the success of "unfair and monopolistic initiatives prompted by digital platforms and/or by governmental interventions" (Dal Zotto & Omidi, 2020, p. 222). The importance of data and metrics in contemporary media business models adds several constraints to market balance as the ability to survive in data driven environments may imply the success or failure of business endeavours, especially smaller ones. This is particularly true in media ecosystems which rely on a tight balance between branded / legacy content and independent (and sometimes amateur) content proposals, such as podcasting. If the technological determination of the format is rather simple, the managerial skills needed to properly explore podcasting as a way to communicate are not, as the simple logic of easily shared audio files hides a complex media system with complex economic, political, social and cultural characteristics (Sterne et al. 2008)

The underlyingly hybrid aspect of Podcasting, as both a technological and cultural shift that may bring benefits to other fields, and even strengthen the public sphere, therefore, relies upon the ability to define sustainable frameworks that foster systemic innovation and fair practices, combining the interests of niche-oriented projects and mass audience-driven content, a remarkably hard balancing act other media spheres weren't able to maintain.

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