Qualitative approach to the formalization of a professional podcasting culture. Evolution and trends

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Abstract

The podcast has expanded as a consumer product within the online audio ecosystem. The term has become popular, and its fame is increasing in the public sphere, whereas its definition and distinct identity, especially with respect to radio, are still being constructed. While different players, including large platforms and multimedia companies, are positioning themselves in this environment, a podcasting culture distinct from the original amateurism is also taking root. The aim of this paper is to explore the extent to which and in what way the routines and practices of creation, production, and distribution have been formalized to determine whether these processes are fostering a specific professional podcasting culture in Spain. Using semistructured in-depth interviews conducted with professionals linked to the podcasting sector, we aim to determine some of the practices that these players are starting to see as well-established within and unique to the industry, as well as those practices that have yet to become established. On the one hand, thanks to the increase in business volume and investment from production and distribution companies, the space for professionalization has been consolidated. The production standards and perceived quality of this audio content have been affirmed. On the other hand, definitions and categories related to this medium's identity; the requirements with respect to understanding an audience, especially in its qualitative dimension; and the professional profiles and dynamics that must be established remain to be explored.

Keywords

Podcasting; Podcasts; Online audio; Professional culture; Cultural industry; Radio; Professionalization, Audience; Media ecosystem; Platformization; Professional dynamics; Audio culture; Digital; Audio communication.

1. Introduction

1.1. An identity under construction

In the list of the "80 Podcasting tips to start a successful podcast" (**Brooke**, 2021) offered by industry experts and professionals, the hosting service *Buzzsprout* ranked the following piece of advice as first on the list:

> "Subscribe to all podcast industry and podcast recommendation newsletters out there. Your podcast is part of the very large –and growing– landscape of podcasts and you need to know what else is out there!" (**Brooke**, 2021).

We deduce from this that, first, there is no doubt that an industry exists and, second, that, by providing information about its products and innovations, it creates shared knowledge that can be useful in integrating new members. Eighth place on that list was occupied by the clear dichotomy in motivation that beginners must face right from the start:

> "If podcasting is a passion, focus on that. If it's a business, invest in it like one. People who don't choose a lane are the ones who find themselves most frustrated by the industry." (**Brooke**, 2021).

This implies that industry logic is not without its share of disappointment for these hypothetical new creators, even if the reason for this disappointment is measured in commercial terms. The verb that inevitably appears in entries from a large number of the sector's online publications, blogs, workshops, etc., is "*monetizar*" ["monetize"], or "to convert an asset into money" ["*convertir un activo en dinero*"] according to the definition that the *Real Academia Española de la Lengua* is considering incorporating in future editions of its dictionary; unlike the verb "*rentabilizar*" ["to make profitable"], it limits this benefit or profit to the purely monetary (*FundéuRAE*, 2013).

This is just one example of the hundreds of tips and lists of recommendations that we found recently about the dynamics, tools, and protocols that should be considered when designing, producing, and distributing a podcast. In 2022, now that podcasting has come of age, it seems undeniable that it has evolved from an amateur pursuit into one that supports different business models. In his fundamental approach to the evolution of this practice, which he described as a "second age" of podcasting, Tiziano Bonini observes:

> "What is happening to podcasting, 11 years after its invention, is its transformation from a do-it-yourself, amateur niche medium to a commercial mass medium: from narrowcasting to broadcasting." (**Bonini**, 2015, p. 27).

This article sets out to explore the extent to which such production and dissemination routines and practices as well as business models have been formalized, and how this is happening, resulting in a specific professional podcasting culture.

However, beyond this particular format, it is becoming certain that the audio ecosystem will be a privileged communication space, and the concepts of online audio, the audiosphere, the audification era (**Ormaechea**; **Fernández-Delkader**, 2019), and audiostreaming (**Celaya**, 2022) are used to encompass the upsurge in a series of practices and products that include smart speaker use, the growth of voice messages, audiobooks, on-demand radio, streaming music consumption, and podcasts in the new millennium (**Martínez-Costa**; **Legorburu**, 2021).

That "out there" mentioned in the aforementioned tip (if indeed there is a space "outside" of digital communication, which by its very nature is embedded in a continuum of production and consumption) is difficult to delimit, since podcasting follows diverse practices of production, distribution, and consumption, and identifying the boundaries between inside and outside requires observing an ever-changing landscape from a certain place and at a given time. Therefore, this article tries to delimit the podcasting culture within the audio ecosystem mentioned by Richard Berry:

> "podcasting is an ecosystem that is shared between varying, but not necessarily competing, auditory forms that span entertainment, education and amateur audio work" (**Berry**, 2018, p.26).

It will be delimited at this precise moment in time, with the understanding that this will create a snapshot of what sector professionals in Spain think of their own practices.

Furthermore, although limiting the analysis to Spain will affect the transnationality inherent to this form of digital audio, which is capable of creating communities of listeners/producers scattered all over the planet but also of drawing attention to local phenomena that are difficult to convey outside their natural audiences, this approach permits advances in research about the landscape that then can be augmented or modify. In this sense, the present research recognizes the important influence of two previous works with which it can be closely associated: on the one hand, the work of **García-Marín** (2019) regarding the evolution of podcasting in Spain, focusing on its participatory, open, and amateur character, and on the other hand, the analysis of **Sellas** and **Solà** (2019) on the configuration of the *Podium Podcast* platform in Spain. Both studies used in-depth interviews to unpack the technological, economic, social, and cultural conditions underpinning the construction of a podcasting culture, and both included a term in their title that they address: "radio".

Despite the delayed emergence of a specialized academic field, the "podcast studies" field **Berry** (2018) advocated for and, conversely, the proliferation of specialized publications about different players and agents outside and inside the industry, the prevalence of radio and broadcasting as forms of media linked to podcasting is still undeniable (**Gallego-Pérez**, 2012; **Berry**, 2016; **Markman**, 2015). This is even more so when media convergence and the digital transformation of the media have made it clear that the radio industry must rethink its modes of distribution, insight into its audiences, product design, and business strategies (**Bonet**; **Sellas** 2019; **Pedrero-Esteban**; **García-Lastra**, 2019). Therefore, the

starting point for the study of podcasting has been to establish its similarity to radio, especially in the English-speaking sphere, which is marked by the fact that the major players in the professional development of podcasting have been public broadcasters such as the BBC and NPR. However, according to Glen Weldon –host of NPR's *Pop Culture Happy Hour* and author of a recent manual on how to start a podcast– broadcasting and podcasting rhyme, but that is where the similarities end, since the characteristics specific to podcasting are its on-demand and on-the-go nature (**Weldon**, 2021, p. 9). In addition, he points out two conditions that must be taken into account: the fact that the consumer becomes the curator of the media offering that, in this case, they are going to listen to, derived from those mentioned above, and (the central idea for a creator) that what they can control in this changing landscape is the quality of their work. Thus, the potential to build a loyal audience lies in the practices that make their storytelling effective and their audio production high quality (**Weldon**, 2021, p. 16).

Defining podcasting thus involves one to narrow down which genetic traits this "new" format takes from its predecessor and determine those specific attributes that set it apart from its predecessor. In this sense, it is becoming increasingly clear that podcasting is not a mere extension of radio but rather a "new species of media" ["*nueva especie mediática*"] (**García-Marín**, 2019, p. 194) that coexists with it, exhibiting continuities and discontinuities in their production routines, ways of appealing to their audiences and their funding sources, and ways of distributing their content and shared knowledge, all of which confirms that podcasts are media products with specific features. This is due to their technological characteristics, but

> "The evolution of independent podcasting and expansion of podcasts beyond the radio industry, not only in the amateur scene but also in areas such as education, marketing, arts and public relations, and the consolidation of a podcasting culture (**Llinares**; **Fox**; **Berry**, 2018) show the progressive construction of a self-identity for podcasting" (**Sellas**; **Solá**, 2018, p. 67).

1.2. Platformization and formalization of the podcast industry

While a narrower definition is based on the technical infrastructure provided by really simple syndication (RSS), podcasting as a medium is similarly defined by industrial, textual, and cultural criteria that grant it its distinctiveness (**Berry**, 2018, p.27).

However, that unique identity is not set in stone: in 2015 Bonini described a "second age" of podcasting and, in 2019, Nicholas Quah announced that we were entering the era of "Big Podcasting" (**Quah**, 2019), an assertion that was supported by the observation that large platforms and multimedia conglomerates had entered the on-demand audio ecosystem and that their presence was going to transform professional practices, business models, and the consumption logics of their audiences. The recently dubbed "Podcast Wars," which have rocked the media landscape owing to powerful platforms (*Apple Podcast*, *Spotify*, *Google Podcast,* or *Amazon*'s *Audible*) vying for the control of distribution and the monopolization of podcast audiences, are proof of this and demonstrate that, as summarized by **María-Jesús Espinosa-de-los-Monteros** (2021), we are witnessing "the platformization of audio and the audification of platforms" ["*la plataformización del audio y la audificación de las plataformas*"]. A detailed description of this transformation process can be found in the work of Terol-Bolinches, Pedrero-Esteban, and Pérez-Alaejos, in which they point out how, in the case of the podcast,

> "the focused interest of the large technological companies has ended up subjecting this audio format to the same distribution and marketing dynamics as those of music, cinema, fiction series, and video games" ["*el decidido interés de las grandes compañías tecnológicas ha acabado por someter este formato de audio a las mismas dinámicas de distribución y comercialización que las de la música, el cine, las series de ficción o los videojuegos*"] (**Terol-Bolinches**; **Pedrero-Esteban**; **Pérez-Alaejos**, 2021, p. 483).

The authors note that the benefits of this transformation will not be the same for the different players operating in this market (producers, distributors, and advertisers) and that

> "the challenge remains to find monetization models that make the editorial gambles on distinctive and innovative titles and treatments viable" ["*el reto sigue siendo encontrar modelos de monetización que hagan viables las apuestas editoriales por títulos y tratamientos diferenciales e innovadores*"] (**Terol-Bolinches**; **Pedrero-Esteban**; **Pérez-Alaejos**, 2021, p. 483).

The interest of these large multimedia companies, roused by audience milestones –and high-quality audio narratives– such as *Serial* (2014), is driven not only by the creative possibilities that podcasts offer but also by their potential to attract and build massive audiences. Thus, the propensity to predict which business model will sustain the productions from not only the major platforms but also the catalogs of independent production companies and the ventures of podcasters who continue to work outside professional structures runs up against a variety of unknowns that are potentially more negative for independent creators (**Sullivan**, 2019, p. 10). In this new context, as Cwynar states, "the gap between the producing minority and the listening majority grows ever wider," and the possession of social and cultural capital becomes even more important, given the inherent difficulties of accessing these new platforms and gaining visibility once access has been obtained (**Cwynar**, 2019, p. 14). In the same vein, studies such as that of Wade-Morris warn that *Apple* and *Spotify* are progressively becoming the default distribution method and how the need to be discoverable on these platforms poses technical and cultural challenges that, in the end, affect podcasters and the content they create (**Wade-Morris**, 2021).

In parallel, as podcasting has become profitable, it has begun to formalize, developing its own set of practices, discourses, and institutions. Processes have become professionalized and institutionalized, with more specific production practices, which has allowed podcasters to differentiate their work (usually from radio) with greater confidence (**Sullivan**, 2018). We are therefore faced with a transforming media ecosystem in which the professionalization of practices, the establishment of uses and protocols of production, the creation of distinct professional roles, and specific training are essential for the survival of projects. In addition, dissemination strategies in this ecosystem entail the popularization and public legitimization of this audio content so that not only do podcasts win over larger and more devoted audiences but these audiences also associate the symbolic value of cultural products with them, a value that can be measured by criteria beyond simple metrics.

In Spain, recent initiatives and business alliances attest to the volatility and growth of the sector. *PRISA Audio* consolidated all its nonlinear audio services for its different titles (*Prisa*, 2022) and, in March 2022, closed a deal with *Spotify* to launch new original podcasts on that platform (*Cinco días*, 2022). Meanwhile, Atresmedia, under the direction of Toni Garrido, recently launched *Sonora*, a new on-demand podcast platform offering exclusive content (**Zumeta**, 2022).

In addition, diverse broadcasting and dissemination proposals attest to the legitimization of podcasting in the cultural landscape. At the end of last year, the *Observatorio de la Cultura* [Cultural Observatory] announced that, in general terms, the podcast ranked ninth on its list of "The best of digital culture" ["*Lo mejor de la cultura digital*"]. A few weeks earlier, the winners of the first edition of the Global *Ondas* Awards in Podcasting, the awards given by *PRISA Audio* and *Cadena SER* in collaboration with *Spotify*, were made public, with a record number of nominations for awards of this nature. Following the lead of the publication of the blog "Days of wine and podcasts" [*Días de vino y podcast*] in *El País*, *Prisa Audio* launched *Sonograma*, a new newsletter about podcasting, audio, voice, radio, and audio culture. At nearly the same time, *Forbes* magazine published a list of the 50 most important personalities in the Spanish podcasting world (*Forbes*, 2022). However, despite the number of professionals referenced, the uproar on social media about who had been left out could not be avoided. The same publication also announced the creation of *Estación Podcast*, the First Ibero-American Festival of Audio Creation, to be held at the *Círculo de Bellas Artes* (Fine Arts Circle) in Madrid (**Aparicio**, 2021). Among other events, March also saw the second edition of the *Podwoman* online meetup, dedicated to women in the podcast industry, organized by EkosMedia and sponsored by *Podimo*, *Ivoox*, and *Amazon Music* in collaboration with *Spreaker*. These are some examples of the new dimension that demonstrate that podcasting has entered mainstream consciousness in such a way that it takes on a new cultural meaning (**Llinares**; **Fox**; **Berry**, 2018).

2. Method

The aim of this article is to understand how a professional podcasting culture is taking shape in Spain. To this end, data collection was carried out through semistructured, individual, in-depth interviews with an average duration of one hour. This type of interview allows researchers to understand the subjects' perspectives more naturally, since it offers subjects greater freedom to externalize their feelings, meanings, and experiences (**Trindade**, 2016), and it allows topics to be addressed via trigger points so that interviewees can express themselves freely.

In this case, we designed an ad hoc interview, divided into two basic sections containing different dimensions: the first of these was dedicated to the podcasting ecosystem (definition, criteria, industry framework, platforms, and audience), and the second to professional culture (self-perception, processes, tools, working environment, professional roles, knowledge-sharing spaces, etc.). Before this, there was a section about participant identification and informed consent regarding study participation and the use of their statements in the subsequent publication.

The division of the sections and the dimensions of the interviews were structured as shown in Table 1.

Table 1. Sections and dimensions of the interviews

Informed consent	Professional role and affiliation Consent for recording and quotation
Audio ecosystem	Definition (medium, format, product) Evaluation criteria and opinion Platformization and future outlook Audience (relationship with content, measurement, profiles, etc.)
Professional culture	Self-perception Industry framework (business models and production structures) Professionalization/amateurism Dynamics and professional roles Professional networks Enquiries and leading professionals

In the subsequent analysis of the informants' statements, other recurring features that emerged during the conversations (listener communities, creativity, freedom, etc.) were also incorporated into these parameters. This paper presents the most relevant information collected during the more than 10 hours of audio analyzed. Note that some of these dimensions are explained succinctly herein, while others receive greater depth and detail. The participants' freedom of expression, which semistructured interviews encourage, uncovered topics that they considered important when explo-

ring how a professional podcasting culture is being created; in the end, these were grouped into four sections: definition and identity, knowledge of and bond with the audience, industry framework and professionalization of the sector, and professional dynamics and profiles.

In terms of selecting informants, we contacted subjects who were leaders in the field owing to their direct relationship to the Spanish podcasting sector and their proven track record in this field. These informants are privileged, special, and important to the research objectives, as they hold prominent positions within the group being researched (**Vallés**, 1999).

Ten semistructured interviews[1] were conducted online through the platform *Teams*[2]. This allowed us to record and transcribe their statements, in accordance with the participants' informed consent. Six women and four men participated in the interviews.

Informants with existing ties to the media and, more specifically, to audio, either through specific training or through a professional career related to radio or in the podcast sphere itself, fit the profile. Currently, these informants work in Spain for audio platforms or independent audio production companies and have very diverse professional profiles: management, creative, production, design, distribution, scriptwriting, or training, among others.

Table 2. Profiles of the interviewees

Interviewee	Profile	Current professional position
Ana Alonso de Blas	Philologist, journalist, and actress; professional career in radio	Director of *SER Podcast* and audio fictions
Ana Ribera García-Rubio	Degree in geography and history; professional career in audiovisual media	Editor-in-chief at *Prisa Audio*
Chuse Fernández	Industrial engineer; professional career in radio	Coordinator of *Escuela de Radio TEA FM*; podcast producer and sound designer at *Resonar Producciones* and *Viva Voice*, UK
Eugenio Viñas	Journalist and digital positioning consultant	Journalist, producer, and creator of video and audio for media and platforms; Director of the masters degree in podcasting and digital audio at *Barreira A+D*
Francisco Izuzquiza	Radio journalist	Podcast producer and founding partner of *YesWeCast*
Iván Patxi Gómez Gallego	Communicator; professional career in radio	Head of audio content at *Zinet Media Group*
Jimena Marcos	Journalist, scriptwriter, and audio creator	Contributor to *Podium Podcast* and *Adonde Media*
Lourdes Moreno Cazalla	Professional career in radio and digital transformation; doctorate in audiovisual communication	Executive producer of *Podium Podcast*, in charge of audience distribution for *Prisa Group*'s production and distribution company
Mar Abad	Journalist and digital communication	Editorial director and co-founder of the podcast label *El Extraordinario*
Mona León Siminiani	Journalist; master's degree in radio; professional career in content creation	Podcast creator; director, screenwriter, filmmaker, podcast producer; founder of the label *Formidable Son* (formerly *La Sonora Podcasting*)

Once the interviews had been conducted, the discussion analysis phase was carried out by using a qualitative-interpretative approach, on the basis of their transcriptions, to observe how the informants made sense of their personal experience (**Sellas**; **Solà**, 2019). This is a reflective process, leading from the data to their deep understanding and comprehension (**González-Gil**; **Cano**, 2010) to discover recurring themes related to the object of study, as well as emerging ideas, conflicting concepts, and discursive absences.

3. Analysis

As mentioned above, in 2015, Bonini published "The 'second age' of podcasting". In it, he ties the evolution of podcasting to technological developments, in particular, the proliferation of smartphones; creativity; the development of podcast networks; and the work of podcasters, along with other conditions that, together with issues such as the emergence of podcast applications or the use of new narratives, would be sufficient elements to describe this as a second era of podcasting. From 2004, when the term "podcast" was first used (**Hammersley**, 2004), to the present day, the transformations in this field have been numerous. One might ask, then, whether such a level of development has been reached that it has given rise to a podcast industry, with multiagent involvement, a variety of topics, and forms of organization and production, as **McHugh** (2016) indicates.

3.1. Identity and definition of the podcast

As seen above, the definition of the podcast has revolved around its technological characteristics and its subscription model of distribution since its inception. To this definition, which focuses on the hosting of audio and its dissemination, various nuances must be added, as was evident from the interviews conducted during the study. In fact, none

of our informants defined podcasting in this way, or at least not only in this way, and they all agree that, at this moment, there is no definitive definition of or consensus on what podcasts are, not even among those involved in their production and distribution spaces. The concept has been diluted, and the notions that concretize it have been broadened. An example of this is Francisco Izuzquiza, who offered this definition in 2019:

> ‘ There is no definitive definition of or consensus on what podcasts are, not even among those involved in their production and distribution spaces ’

"a series of audio files (or videos) uploaded to the Internet and distributed through an RSS feed" ["*serie de audios (o vídeos) subidos a Internet y distribuidos mediante un* feed *RSS*"] (**Izuzquiza**, 2019, p. 24);

during his interview, he suggested that it is the audience itself that establishes what a podcast is, and he even sees this as a trend in the industry:

"If the audience decides that canned radio is a podcast because they consume it that way, excellent; if the audience decides that video, now on *Apple*'s podcast app, is a podcast or if they decide that an interview, a narrative or whatever else is, wonderful. I am increasingly moving away from the purely technical definition, because by eliminating RSS, I don't even have that element to define it" ["*Si la audiencia decide que la radio enlatada es un podcast porque lo consume de esa manera, fenomenal; si la audiencia decide que el video, ahora en la aplicación de podcast de Apple, es un podcast o si decide que una entrevista, un narrativo o cualquier otro lo es, maravilloso. Cada vez me voy más de la definición puramente técnica, porque al eliminar el RSS, ya ni siquiera tengo ese elemento para poder definirlo*"].

For Ana Ribera, however,

"A podcast has to be natively created content, meaning it doesn't come from online radio. It has to be content designed as a podcast from the first minute" ["*Un podcast tiene que ser un contenido creado nativo, es decir, que no venga de la radio online. Tiene que ser un contenido pensado como podcast desde el primer minuto*"].

The new conceptualization of the podcast is determined by the evolution of the online audio ecosystem, and not only by those primitive audio files hosted in a digital space and accessible through subscription; it also encompasses other broader processes around creation, diversification of distribution, access, or forms of consumption. First, according to our informants, the difference lies in the possibilities of offering timeless audio content, in contrast with radio's immediacy and inherent periodicity. This view confirms the perception of **Ganyet** (2021), for whom radio can be identified with immediacy, proximity, and information, whereas podcasts are more universal and timeless and convey knowledge according to the author's own vision. In this vein, Ana Ribera noted:

"For me, not being subject to current affairs also defines a piece of content as a podcast. It has been created to be listened to at any time. And another thing that to me very much defines something as a podcast is identification with the narrator, with the person or with the hosts, since this forms a bond that is created with the narrators" ["*Para mí que no esté sujeto la actualidad también define un contenido como podcast. Se ha creado pensando en que se escuche en cualquier momento. Y otra cosa que para mí lo define mucho como podcast es la identificación con el narrador, con la persona o con los* host*, que se crea el vínculo que se crea con los narradores*"].

Second, the specificity of the podcast is tied to the emergence of new forms of storytelling. The fact that the narrative quality is as important as the quality of the sound design is another of the issues highlighted by the informants:

"it has the resilience of a product forged over low heat, having attention to detail" ["*tiene voluntad de producto hecho a fuego lento, de cuidar los detalles*"] (Jimena Marcos).

They talked about freedom, creativity, and room for experimentation (Ana Alonso, Mar Abad, Chuse Fernández, and Mona León Siminiani), which make it possible to create podcasts without the constraints of live broadcasting or the immediacy of news. The podcaster emerges as an explorer and discoverer of a new territory with the

"liberated sensation of not taking on certain baggage or routines" ["*sensación liberada de no estar asumiendo según qué hipotecas ni según qué rutinas*"] (Eugenio Viñas).

They considered freedom to be a treasure that must be protected, and some of the informants (Chuse Fernández, Mar Abad, and Mona León Siminiani) were concerned about maintaining this freedom after the arrival of large companies in the podcasting sector:

"there is concern that data on the audience, profit, and profitability will begin to take priority" ["*preocupa que empiecen a primar los datos de audiencia, de beneficio y de rentabilidad*"] (Chuse Fernández).

Third, they highlighted the possibilities for podcasts to offer content (which radio, owing to its own production and distribution processes, cannot do) to minority, non-mass, niche audiences (Jimena Marcos, Lourdes Moreno, Ana Alonso, and Eugenio Viñas), through on-demand consumption:

"The podcast is not about rankings; it's about niches, micro niches, or nano niches. It is about niches, it is about loyal audiences, and it is about communities" ["*El podcast no va de rankings, va de nichos, de micro nichos o de nano nichos. Va de nichos, va de audiencias fieles y va de comunidades*"] (Eugenio Viñas).

3.2. The audience

Within the industry logic, knowledge of the audience is a deciding factor driving changes in some professional dynamics, as the informants explained. In recent years, the measurement and understanding of quantitative data related to podcast audiences has developed. Not only can you now determine how many people listen to or download a piece of content, but you can also examine at what point they stop listening, how many times they come back and listen to a piece of content, and how many downloads never get listened to at all. This better understanding of the audience makes it easier to create audio projects that are better suited to their demands, in terms of not only quantifiable variables such as duration but also the development of content from its script:

> "We already create the stories, and we think of them keeping in mind that they have to work, even if people hit pause. We will have to rack our brains for the script and for a wonderful structure" ["*Las historias ya las creamos y las pensamos teniendo en cuenta que tienen que funcionar, aunque la gente le dé al pause. Tendremos que rompernos la cabeza con el guion y con una estructura maravillosa*"] (Eugenio Viñas).

Even with the development in metrics and technology applied to the study of audiences, another of the issues that arose during the interviews is that their development still has a long way to go, especially to achieve a reliable standardization of data –something especially relevant for advertising investment, which has exceeded 60 million in digital audio in the last year, according to the *IAB* (2022). Even if such quantitative information is relatively accessible, despite the fact that each platform provides its own data (number of downloads, number of completed plays, number of times listeners returned to listen, listens more than 1 minute long, etc.), qualitative research has yet to be taken advantage of, as **Espinosa-de-los-Monteros** (2022), director of *Prisa Audio*, explained in the podcast *The Coffee*, all about the creation of the world's largest Spanish-speaking audio producer:

> "It is essential to have a technology that allows us to determine value propositions, making audio content enormously reliable for brands. There is a lot of room for improvement there: more precise metrics and more qualitative profiling. Being able to break down the audio data further is one of the things that can be improved in the coming years, and if it hadn't been done before, that has to do with the fact that the industry had not blossomed as it has now" ["*Es indispensable disponer de una tecnología que nos permita detectar propuesta de valor, que para las marcas sea enormemente fiable el contenido en audio. Queda mucho por mejorar ahí, mayor precisión en las métricas, alcances más cualitativos. Poder desmenuzar más el dato en audio es una de las cosas en las que se puede mejorar en los próximos años y si no se ha hecho antes tiene que ver con que la industria no había eclosionado como lo ha hecho ahora*"].

In amateur podcasting, the audience is found and attracted after the creation of the podcast, whereas in this incipient industry, as confirmed by the informants, the appearance of certain proposals created in reverse can be observed: first searching for and detecting niches yet to be filled and then producing specific content for them. Some informants have their doubts about this process owing to the fact that, during this process, the originality and authenticity of generating content are lost and it must succumb to audience demands (Francisco Izuzquiza). However, from the platforms, as Ana Alonso explained:

> "Both ecosystems coexist [...] although the starting point is that, to fill a need, we always look for someone very specialized who has that passion because, obviously, if not, it doesn't work" ["*Ambos ecosistemas conviven [...] aunque el punto de partida sea ese, llenar una necesidad, siempre buscamos a alguien muy especializado con esa pasión porque, obviamente, si no, no funciona*"] (Ana Alonso).

Audiences are also playing a prominent role in the evolution of the podcast industry by creating communities loyal to specific content or podcasts. The informants emphasize the need to have feedback from the audience, who can express what they think of the product that was made.

> "Beyond awards, I think that fundamentally it's listening to your listeners and the feedback you can get about what you do, whether good or bad, that gives value to the product you create" ["*Fuera de los premios creo que fundamentalmente es la escucha de tus oyentes y el* feedback *que puedas tener respecto a lo que haces, sea bueno o malo, lo que da valor al producto que creas*"] (Chuse Fernández).

Subscribing to a given podcast and the prospect of receiving new content directly from it build audience loyalty, make them a part of a community that shares a passion (Francisco Izuzquiza), and strengthen their sense of belonging: "There is no successful podcast that does not have a community, none" ["*No existe ningún podcast de éxito que no tenga una comunidad, ninguno*"] (Eugenio Viñas), because most of them have been building a community for a long time with the help of social networks; "Understand your mind" [*Entiende tu mente*] with Molo Cebrián or "The good morning club" [*El club de los buenos días*] with Oliver Oliva are examples of this (Iván Patxi Gómez).

> The appearance of *Podium Podcast* in 2016 in the audio landscape and the emergence of the large platforms for podcast distribution and production would be the two jumping off points for discussion surrounding the industry in Spain

3.3. Professional culture within the podcast industry

The professional dynamics that are developing within podcasting could shape a specific professional culture that, although it is complex and intangible (**García-Avilés**, 2021), we understand as the set of meanings, behaviors, codes, and conventions shared by the players in a specific field that determine its functioning and their individual and collective achievements in a specific spatial and temporal framework (**Pérez-Gómez**, 1995). The professional culture surrounding podcasting seems to be taking shape as a result of the professionalization of the sector, which is driven

> "by transmediality, the mushrooming use of this format by radio broadcasters (and other media) in their digital progression, and the interest of large platforms" ["*por la transmedialidad, la proliferación del uso de este formato por parte de las radios (y otros medios) en su progresión digital, y el interés de las grandes plataformas*"] (**García-Marín**, 2019).

According to the analysis of the interviews, the appearance of *Podium Podcast* in 2016 in the audio landscape and the emergence of the large platforms for podcast distribution and production (*Spotify*, *Audible*, *Apple*, etc.) would be the two jumping off points for discussion surrounding the industry in Spain. This was also the opinion of **Espinosa-de-los-Monteros** (2022), in the podcast *The Coffee*:

> "Absolutely it is a business, and I would say it is already shaping up to be an industry. The podcast is already a powerful medium. The entry of all the major technology companies and the main media outlets confirms the creation of an industry, of a business. [...] It is 18 years old, it is already coming of age, but it is true that this latest era, for which the pandemic was a pivotal moment, has accelerated everything. I think it's a business, that it's an industry and it's a format that is here to stay" ["*Absolutamente es un negocio y yo diría que se está conformando ya una industria. El podcast es ya un soporte de gran alcance. La entrada de todas las grandes tecnológicas y de los principales medios de comunicación constatan esta generación de una industria, de un negocio. [...] Tiene 18 años de vida, está ya en la mayoría de edad, pero es verdad que esta última era, que tiene como punto de inflexión la pandemia, lo ha acelerado todo. Yo creo que es un negocio, que es una industria y es un formato que ha venido para quedarse*"].

Investment is causing "a dynamization of this industry at an economic level" ["*una dinamización de esta industria a nivel económico*"] (Viñas) and is opening the possibility of promoting large-scale professional projects with high production quality, which "is what makes a substantial difference" ["*es lo que marca una diferencia sustancial*"] (Ana Ribera) between professional and nonprofessional projects. An example of this is audio fiction, a genre that has all but disappeared from radio schedules and has been bolstered in recent years by large production companies, especially *Podium Podcast*. These projects are gaining prominence, not only because of the number of productions but also because of their audience data. Lourdes Moreno summarized the elements that make up and underpin this podcast industry:

> "there is public demand, there is an increase in supply, there is exclusive content, there are a multitude of platforms, and there is investment" ["*hay demanda del público, hay aumento de oferta, hay contenidos exclusivos, hay multitud de plataformas y hay inversión*"].

According to Chuse Fernández, there has been "a leap from amateur podcasting to a space in which professional projects have a place" ["*un salto del podcasting amateur a un espacio en el que tienen cabida proyectos profesionales*"] owing to the arrival of investment (Jimena Marcos) and, for amateur podcasters, this means finding ways to improve operation. Until now, time and effort would be invested in the creation of an audio project without knowing whether there would be an economic return. With the arrival of investment, it is possible to offer/sell a project idea or a business plan (Iván Patxi Gómez and Francisco Izuzquiza) to various platforms, which may be interested in buying it if they find that they can make a return from its operation in the short or long term (Lourdes Moreno). The informants also observed that brands are gradually moving into podcasting and that there has been an increase in advertising projects and investment in advertising, which, they believe, will increase in coming years (Iván Patxi Gómez).

Although the general feeling among informants regarding the platforms is positive, three contrasting ideas have arisen that highlight the risks. First, the risk of a rift between platforms –which finance, produce, host, and distribute professional projects– and independent creators, who still produce on low budgets and with fewer material and human resources and who must keep working to find their audience. Second, the risk of concentration through the union and merger of the few current players, which may result in a less diverse and democratic ecosystem: "What I'm seeing in audio, and it's a difference from the advent of the Internet, is a terrifying tendency toward concentration" ["*Lo que estoy viendo en el audio, y es una diferencia con respecto a la llegada de Internet, es una tendencia terrorífica a la concentración*"] (Mar Abad). Third, they also perceive that there is a risk that the platforms will conceive of the podcast exclusively as a business, more focused on marketing than on creation (Mona León Siminiani). As several informants pointed out, out of this risk can emerge strategies to find a quick economic return through content with lower production costs, where profit and profitability data take precedence over podcasts' capacity for creation and experimentation. Informants point to the proliferation of talk shows as an example of these practices.

> Investment is causing "a dynamization of this industry at an economic level" (Viñas) and is opening the possibility of promoting large-scale professional projects with high production quality.

"Often, what the tyranny of numbers is actually doing is creating very conservative audio landscapes because they're going to make what people listen to, but it's just that sometimes people listen to that because that's what you give them. If you offer them something experimental, you would discover many more things that otherwise you are not giving them the opportunity to try" ["*Muchas veces la dictadura de los números en realidad lo que está haciendo es crear escenarios de audio muy conservadores porque van a hacer lo que la gente escucha, pero es que a veces la gente escucha eso porque es lo que le das. Si le ofreces algo experimental, descubrirías muchas más cosas que de otra forma no le estás dando la oportunidad de probar*"] (Mar Abad).

3.4. Professional profiles

In the section of the interviews covering self-perception, all the informants defined themselves as podcasting professionals. Although it is true that job status varied –there are differences between salaried professionals, freelancers, entrepreneurs, etc.– and that, whereas some work exclusively for a single company, others work for different labels and production companies on various projects and in a variety of roles, all of them acknowledged that they work exclusively in this sector.

The consolidation of new production structures has also led to the emergence of specific professional profiles. Until a few years ago, podcasters were "a one-man/woman band" ["*hombres/mujeres orquesta*"] (Ana Alonso, Lourdes Moreno) and performed all the tasks necessary to run a podcast. However:

"A person who produces content, writes scripts, edits, publishes, distributes, promotes... it is not sustainable if we want to create a true one hundred percent professional industry. On the radio, on television, in the press, in the movies, in any other media, you don't have just one person doing this whole process" ["*Una persona que produce contenido, guion, edita, publica, distribuye, promociona... no es sostenible si queremos crear una industria profesional verdadera al cien por cien. En la radio, en la televisión, en la prensa, en el cine, en cualquier otro medio de comunicación, no tienes una sola persona haciendo todo este proceso*"] (Francisco Izuzquiza).

With the entry of platforms into the sector and the economic injection they have brought with them, this multitasking has shifted to diversification and specialization (Ana Ribera), as can be seen from the analysis of the interviews. Specific profiles are emerging for different tasks: podcast editors, scriptwriters, producers, directors, developers, sound designers, etc. This is just the opposite of what is happening in radio, where there used to be more specific roles and now, more and more, professionals are taking on a greater number of increasingly diverse tasks.

Those informants who work as part of larger platforms or production companies sensed that a consensus is beginning to form around certain dynamics and professional profiles, and they mentioned "collective work" ["*obra colectiva*"]:

"It's like a relay race; everyone enters and leaves the project at the exact moment as in a big orchestra. There is the score, and each one knows what their instrument is and that they have play the best they can when their day comes. The people who work with us understand that we are very professional, and each of us knows what our role is" ["*Es como una carrera de relevos, cada uno entra y sale del proyecto en el momento exacto como en una gran orquesta. Está la partitura y cada uno sabe cuál es su instrumento y que tiene que dar la mejor nota el día que le toca. La gente que trabaja con nosotros sí que entienden que somos muy profesionales y sabemos cada uno cuál es su rol*"] (Lourdes Moreno).

However, the informants also recognize that there is no consensus within the industry on the names for each of the professional roles (something that is already changing in the podcasting industry in the United States).

"In one industry, you have professions that are more defined and more separated, with a wider range, but we are still far behind the teams in the United States. For example, the names that designate the people who work in the teams in one country or another are different" ["*En una industria tienes las profesiones más definidas y más separadas, y un abanico más grande, pero todavía estamos lejos de los equipos de Estados Unidos. Por ejemplo, los nombres que designan a las personas que trabajan en los equipos en uno y otro país son diferentes*"] (Ana Alonso).

This creates issues confusion for agents in the podcast industry when it comes to providing their services or signing employment contracts. The informants also pointed out that there are no established standards for salaries for each of the roles and the work performed, such that small production companies sometimes have a difficult time setting budgets (Mona León Siminiani).

"The profiles have yet to be defined. [...] If we want to make professional products, if we want to make podcasts and make a living off of the content we make, then the people who make those podcasts have to be well taken care of" ["*Los perfiles están aún por definirse. [...] Si queremos hacer productos profesionales, si queremos hacer podcasts y vivir del contenido que hacemos, entonces las personas que hacen esos podcasts tienen que estar tan bien cuidadas*"] (Jimena Marcos).

Our informants' impression was that progress is being made informally toward this consensus and that, outside of the larger-scale platforms and production companies with stable professionals, there are still not many people who are professionally dedicated to a single task; rather, they are building their income from various services.

4. Conclusions

Sellas and **Solà** (2019) state that a unique identity is being built for podcasting, whose raw material, audio, ties it to radio but which is defined by that which distinguishes it from radio –the way in which it is created and produced: the slow production, the pre-recorded product, the timelessness of the content, and the commitment to quality and depth are indeed characteristics of professional podcasting. Just as its entire identity remains unsettled, the term "podcast" has yet to be defined: for some, the technology or the mode of distribution is the cornerstone of its identity; for others, the audience, through using the term and through its modes of consumption, will come to define it in the medium or long term.

Within the professional environment, the scale of production structures and the differences in resources, the size of work teams, and financial security, which condition professional practices within the sector, should be mentioned. In general, the level of confidence and optimism regarding the outlook of the podcasting industry is high, a feeling not only unique to the interviewed agents but also present within the industrial network, due to the proliferation of projects, the growth of investment, and the increase and diversification of professional profiles. However, this optimism is more clear-cut among those who are supported by a large company than among those who must produce independently or with small production companies; they are more circumspect about the possibilities for growth within the business and about their stability and job security. They are also the ones who most question the role of the major platforms in imposing certain production models, genres, and content, as well as in distribution and audience loyalty strategies.

One of the gaps, in the informants' opinion, was the lack of networks and contact spaces through which podcasting professionals can stay connected with each other and establish shared knowledge. Until relatively recently, this bond was more or less ensured by interpersonal relationships, but with the diversification and growth of professional teams, this will become increasingly difficult. Although tools, such as newsletters, that try to keep industry members up to date with new developments are beginning to appear, it would be a good idea to look for spaces for professionals to meet. Some of the interviewees even referred to the creation of a "Podcast Academy" as a space for meeting others, growing, and making decisions.

As observed throughout this study, we are in the early stages of the creation of a professional podcasting culture in Spain, according to the opinions of its own players. Therefore, there are issues yet to be defined: shaping professional routines and establishing consolidated and shared professional roles within the industry, as well as their salary, depending on the various production models that may be established.

Future research should focus on the role of the podcast audience. Based on these interviews, there is a need for greater refinement in the metrics, which in addition to offering reliable quantitative data with transparency could provide qualitative information that facilitates the creation of niche products. Likewise, another source of uncertainty is whether the prominence of audience quantification jeopardizes the freedom of creation that has so far led the podcast toward profitability or economic return. Other issues open to further study are the management of intellectual property between creators and platforms and the business models that are emerging or taking hold in the industry (subscriptions, the use of advertising and its possibilities, branded content, etc.).

Finally, we can conclude that, although there is optimism regarding the sector's possibilities for growth in the coming years, doubts arise as to its sustainability over time. Some of the interviewees illustrated this with various metaphors. Some talked about a "bubble," fearing that the growth in investment, the increase in the number of companies, the diversification of production companies, the size of human resources, etc. may prove unsustainable in the long term. Another image they used was that of the "funnel": we are currently in the wide part, with an emerging diversity and multiplicity of players, whereas in a few years, we will reach the narrow part, and we will have to see who can move forward. They also talked about a "big wave" that is on the rise and, in the same way, we will have to see where the water settles and which ships remain afloat in the face of a decrease in the great momentum that audio is currently enjoying.

5. Notes

1. With these ten interviews, the saturation point –when there is no genuinely new and relevant contributions to the object of study– of the discussion regarding the object of study was reached (**Taylor**; **Bogdan**, 1987).

2. Conducting interviews in an online video conference format using *Teams* allowed for better adaptability to interviewees' schedules and made it easier to meet without the need for travel, regardless of where the subjects lived, being scattered across Spain. This was the most effective way to arrange the meetings between researchers and interviewees (**Saarijärvi**; **Bratt**, 2021).

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