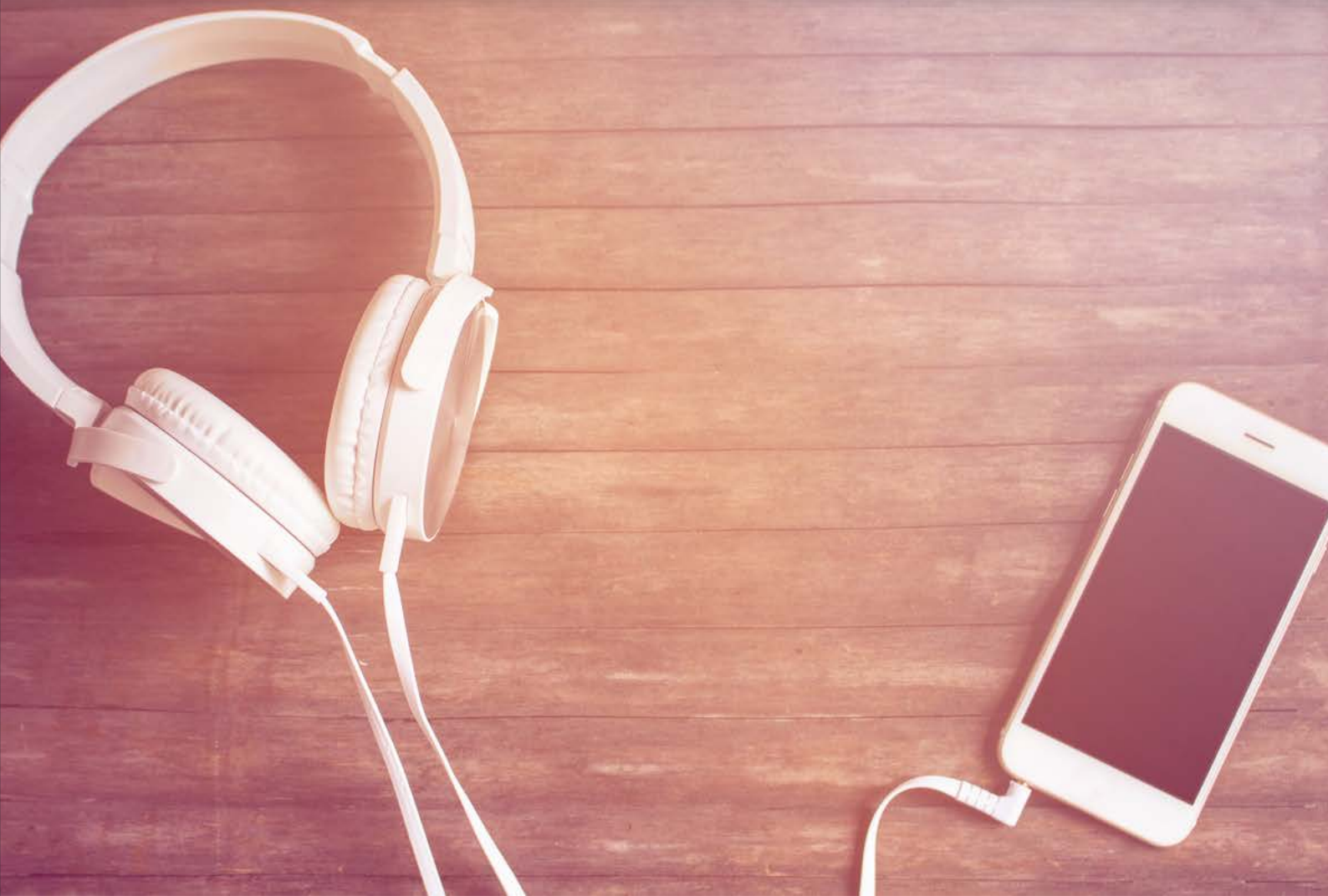


**NEWS & MEDIA
RESEARCH CENTRE**



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PODCAST TRENDS AND ISSUES IN AUSTRALIA AND BEYOND: GLOBAL PERSPECTIVES



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RESEARCH CENTRE**

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DIGITAL NEWS REPORT: AUSTRALIA

Digital News Report (DNR): Australia is an annual report published by the News and Media Research Centre at the University of Canberra. The N&MRC is the Australian partner institute of the Reuters Institute for the Study of Journalism, University of Oxford. This report is the first of N&MRC DNR Special Report Series in 2020.

REUTERS INSTITUTE DIGITAL NEWS REPORT

The *Reuters Institute Digital News Report* is an annual report about digital news consumption based on a YouGov survey of over 80,000 online news consumers in 40 markets. The News & Media Research Centre is the Australian partner of this study.

NEWS & MEDIA RESEARCH CENTRE

The N&MRC advances understanding of the changing media environment. Our research focuses on digital news consumption and the impacts of digital technology on journalism, politics, and society. Research occurs in three hubs: the Digital News+ Lab; the Critical Conversations Lab; and the Media Cultures Lab. The Centre conducts both critical and applied research projects with partners and institutions in Australia and internationally.

More information at www.canberra.edu.au/nmrc

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EXECUTIVE SUMMARY

The term podcast was first used as early as 2004¹ and podcasts have spread widely with the rise in smartphone use. By 2013, Apple had 1 billion global podcast subscribers. In 2020, it is estimated that 55% of the population will have listened to a podcast.²

Podcast genres are very diverse ranging from music, comedy, religion, sport, news, politics, and current affairs. In this report, we focus mainly on news, politics, and current affairs podcasts.

The aim of the report is to examine Australians' podcast listening habits and trends in comparison with other countries and to identify key industry issues. Part 1 of the report is an analysis of data from 40 countries surveyed in the *Reuters Institute Digital News Report 2020*. In Part 2, nine expert contributions from around the globe representing Asia, Africa, Europe, the Americas, and Oceania are presented.

¹ <https://www.onefineplay.com/latest/2019/8/2/a-brief-history-of-podcasting>

² <http://www.edisonresearch.com/wp-content/uploads/2020/03/The-Infinite-Dial-2020-U.S.-Edison-Research.pdf>

ONE-THIRD OF AUSTRALIANS LISTEN TO PODCASTS AND THE AUDIENCE IS GROWING RAPIDLY

Podcast listening is steadily growing in Australia with 32% of news consumers saying they listened to podcasts. This is a five-percentage point increase since last year. Globally, 41% of news consumers listened to podcasts in 2020.

PODCAST LISTENERS ARE YOUNG, AFFLUENT, HIGHLY EDUCATED, AND CITY-DWELLERS

Australian news consumers with higher education attainment and high incomes are more likely to listen to podcasts. Over half of Gen Z (57%) and Gen Y (51%) listen to podcasts while only 31% of Gen X and 13% of Baby Boomers listen. Only about 10% of people 74 and older are podcast listeners.

YOUTUBE IS THE MOST POPULAR PODCAST PLATFORM IN AUSTRALIA

YouTube is rising as a major platform for podcasts. Almost half of Australian podcast listeners (42%) use YouTube to access podcasts, 33% use Spotify, and 21% listen to Apple Podcasts.

YouTube is more popular among news podcast listeners. More than half of the news podcast listeners (54%) used YouTube.

PODCAST LISTENING IS GLOBALLY DIVERSE

In the 40 countries surveyed, podcast listening is the most popular in Turkey (86%), followed by Kenya (70%). In a number of countries more than half of consumers are listening to podcasts; Mexico (61%), Brazil (60%), Bulgaria (59%), the Philippines (57%), Hong Kong (55%), and South Korea (54%). However, in some countries it has not taken off. In particular, only 22% of UK news consumers listen to podcasts.

YOUNG PEOPLE ARE WILLING TO PAY FOR PODCASTS

Almost half of those under the age of 35 (43%) say they are willing to pay for podcasts. This is a much higher figure compared to older generations where only one-third of those 35 or over are willing to pay. This figure is also higher

than the general willingness to pay for news (14%) but lower than the willingness to pay for digital content subscription such as Netflix or Spotify.

NEWS PODCASTS ARE PARTICULARLY POPULAR AMONG THOSE WHO SEEK ALTERNATIVE NEWS

News podcasts are gaining popularity with 11% of Australians listening to podcasts for news, politics, and current affairs. The global average of news podcast listening is 17%; UK with the lowest (6%) and Turkey with the highest (49%).

NEWS CONSUMERS IN COUNTRIES WITH LOW PRESS FREEDOM TURN TO PODCASTS FOR NEWS

News podcasts appear to be fulfilling the needs of citizens who are dissatisfied with mainstream news coverage. Those who live in countries where press freedom is “difficult” (28%) and “problematic” (20%) are much more likely to listen to news podcasts compared to those who live in countries where the press freedom is “good” (11%) and “satisfactory” (16%).

NEWS PODCAST LISTENERS PREFER NEWS THAT SHARE THEIR POINT OF VIEW

News podcast listeners tend to seek podcasts that align with their viewpoint. News consumers who prefer news that shares their point of view are more likely to listen to news podcasts (26%) compared to those who prefer impartial news (16%) and news that challenges their point of view (22%).

NEWS PODCAST LISTENING IS NOT RELATED TO A COUNTRY'S GROWTH IN INTERNET CONNECTIVITY

While podcasts became popular along with the growth in smartphone penetration, this was not a necessary condition for podcasts to gain listenership. On the contrary, countries with high internet and smartphone penetration rates have lower podcast use for news. In general, news consumers in less-connected countries are more likely to be news podcast listeners with some exceptions such as South Korea. It appears that podcasting popularity is determined by a range of sociopolitical factors, including the level of press freedom rather than the technology infrastructure.

KEY FINDINGS

THE GROWTH OF PODCASTS

- In Australia, podcast listening has increased from 27% in 2019 to 32% in 2020 but is still at the lower end in the global market. The global average is 41%.
- In 2020, 11% of Australian news consumers listened to news podcasts.

PODCAST LISTENING BY GENRE

- Specialist podcasts are the most popular among Australian news consumers (15%), followed by lifestyle (12%), news (11%), contemporary life (11%), and sport (7%).
- Australian male podcast listeners (14%) engage more with news and politics podcasts compared to females (8%).

PLATFORMS FOR PODCAST LISTENING

- Almost half of Australian podcast listeners (42%) used YouTube to access podcasts, followed by Spotify (33%) and Apple Podcasts (21%).
- YouTube is even more popular among global podcast listeners (46%).

REASONS FOR LISTENING TO PODCASTS

- The top reason for Australian podcast listeners to use podcasts is to get a diverse range of perspectives (60%).
- News consumers in the US think that the podcast format gives them a deeper understanding of specific issues than they get from other forms of media.

PAYING FOR PODCASTS

- In Australia, younger news consumers (under the age of 35) are more likely to pay for podcasts (43%) than those 35 and older (33%).
- Globally, Australian and South Korean news consumers are the most willing to pay, with 39% saying they would pay for podcasts, whereas news consumers in the UK (21%) were the least likely to be willing.

WHO LISTENS TO PODCASTS?

- In Australia, 37% of male news consumers listen to podcasts, while 28% of female news consumers listen. And 14% of male news consumers listen to news podcasts, while 9% of female news consumers listen.
- Almost half (48%) of Australian podcast listeners are left-wing.
- In English-speaking countries, news consumers under the age of 35 are much more likely to listen to news podcasts than those aged 35 or above. The age gap is more prominent in Australia and the US.
- On the contrary, baby boomers in South Korea are more likely to listen to news podcasts (30%) than the younger cohorts.
- Highly educated news consumers are more likely to listen news podcast in English speaking countries. This trend is more prominent in the US with 26% of those who are highly educated listening to news podcasts compared to 14% of those who had less education.
- News consumers from countries with less press freedom are more likely to listen to news podcasts.
- News consumers who prefer news that shares their point of view are more likely to use podcasts for news.

METHODOLOGY

This report analysed data from a long-running international survey coordinated by the Reuters Institute for the Study of Journalism, University of Oxford. The *Reuters Institute Digital News Report* delivers comparative data on media usage in 40 countries and across 6 continents. The News and Media Research Centre at the University of Canberra is the Australian partner institute and publishes the annual *Digital News Report: Australia*.

The survey was conducted by YouGov using an online questionnaire in late January and early February 2020. The final sample (N=80,155) is reflective of the population that has access to the internet. To be included, respondents must have consumed news in the past month. The data were weighted to targets based on age, gender, region, and education level to represent the total population based on each country's population census data.

The questionnaire and methodology were consistent across all territories with the exception of Philippines, Brazil, Turkey, South Africa, Malaysia, Mexico and Kenya, where internet penetration is still relatively low.

In 2020, we included several questions that inquired about the podcast consumption habits of news consumers. News consumers' likelihood of paying for podcasts was also asked in selected countries: Australia, Canada, France, Germany, South Korea, Spain, Sweden, the UK, and the US.

The Reuters Institute defines a podcast as "an episodic series of digital audio files, which [users] can download, subscribe to, or listen to."³ Given that analyses in the current report rely on data from the *Reuters Institute Digital News Report* project, we used this definition in this report. However, as we will see in the analysis, respondents did not differentiate between audio and video podcasts in their responses. In order to have a more complete picture of how people produce and consume both audio and video podcasts, a more inclusive definition of podcasts that includes video podcasts is needed in the future.

To examine country-level factors that may influence podcast listening, we included publicly available international datasets in the analysis; World Press Freedom Index 2020 (Reporters Without Borders (RSF)), the International Telecommunication Union (ITU) (2019), and Global Mobile Market Report (2018).

2020 PARTICIPATING COUNTRIES

	Argentina	ARG
	Australia	AUS
	Austria	AUT
	Belgium	BEL
	Brazil	BRA
	Bulgaria	BUL
	Canada	CAN
	Chile	CHL
	Croatia	CRO
	Czech	CZE
	Denmark	DEN
	Finland	FIN
	France	FRA
	Germany	GER
	Greece	GRE
	HK	HK
	Hungary	HUN
	Ireland	IRE
	Italy	ITA
	Japan	JPN
	Kenya (new)	KEN
	Malaysia	MYS
	Mexico	MEX
	Netherlands	NLD
	Norway	NOR
	Philippines (new)	PHL
	Poland	POL
	Portugal	POR
	Romania	ROU
	Singapore	SGN
	Slovakia	SVK
	South Africa	RSA
	South Korea	KOR
	Spain	SPA
	Sweden	SWE
	Switzerland	SUI
	Taiwan	TWN
	Turkey	TUR
	UK	UK
	USA	USA

³ Nic Newman and Nathan Gallo, 'News Podcasts and the Opportunities for Publishers': <http://www.digitalnewsreport.org/publications/2019/news-podcasts-opportunities-publishers/> (see page 8)

A black and white photograph of a person recording a podcast. The person is wearing a dark jacket and is holding a smartphone in their right hand. The phone screen shows a recording interface with a 'Recording 13:25' timer and a 'Stop' button. The person's left hand is also visible, holding a microphone. The background is blurred, showing what appears to be a studio or office setting.

PART 1:

**PODCAST TRENDS IN
AUSTRALIA AND THE
WORLD**

PODCASTING IN AUSTRALIA

According to ABC's fourth annual podcast survey, nine-in-ten Australians were aware of the term 'podcasting'.⁴ In this year's *Digital News Report: Australia 2020*, 32% of Australian news consumers said they listened to podcasts.⁵

During the COVID-19 lockdown, there was an increase in podcast listening by 15%⁶ indicating a growth in podcast listening in Australia. According to a report by Edison Research, among Australians aged 12 years and above who listen to podcasts, one-fifth listen every day, and more than half (57%) listen to the entire episode.⁷ These industry statistics indicate that podcast listeners are engaged audiences.

PODCAST GENRES

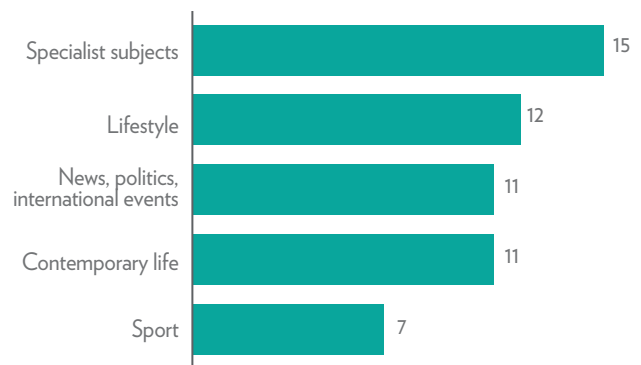
The survey included a question on whether respondents had listened to podcasts in the past month, giving them five different podcast genres to choose from: 1) news, politics, international events (hereafter referred to as news); 2) contemporary life (e.g., crime, societal issues); 3) specialist subjects (e.g., science and technology, business, media, health); 4) sport; 5) lifestyle (e.g., food, fashion, arts, literature, travel, fun).

In Australia, specialist podcasts (e.g., science and technology, business, media, health) are the most popular genre (15%), followed by lifestyle (e.g., food, fashion, arts, literature, travel, fun) (12%), news (11%), contemporary life (11%), and sport (7%) (see **Figure 1**).

Figure 2 shows that there is a gender difference in podcast genre preference. Overall, men are more likely to listen to podcasts compared to women. Furthermore, men (14%) listen to news podcasts more than women (8%). Male news consumers are much more likely to tune into sport podcasts (12%) than females (3%).

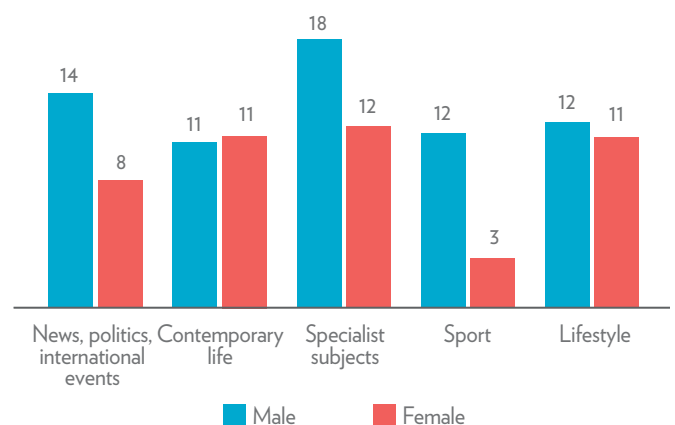
By the end of 2020, the annual revenue of the Australian podcast market is expected to reach \$47 million.⁸ According to PricewaterhouseCoopers (PwC), Australian podcasting market is expected to reach \$110 million in 2022.⁹ Coinciding with the market growth, new business models are emerging. While the majority of podcasts are currently free of charge, podcast producers are experimenting with paid subscription beyond ads and sponsorships.¹⁰

FIGURE 1: PODCAST LISTENING BY GENRE IN AUSTRALIA (%)



[Q11F_2018] A podcast is an episodic series of digital audio files, which you can download, subscribe or listen to. Which of the following types of podcasts have you listened to in the last month? Please select all that apply [Base= Australian news consumer 2131]

FIGURE 2: PODCAST GENRE PREFERENCE BY GENDER IN AUSTRALIA (%)



[Base= Australia 2131]

⁴ <http://www.abc.net.au/cm/lb/11563738/data/download-2019-abc-podcast-research-pdf-data.pdf>

⁵ Sora Park, Caroline Fisher, Jee Young Lee, Kieran McGuinness, Yoonmo Sang, Mathieu O'Neil, Michael Jensen, Kerry McCallum, and Glen Fuller, *Digital News Report: Australia 2020*: <https://apo.org.au/node/305057>

⁶ <https://podnews.net/press-release/arn-podcast-covid>

⁷ Edison Research, 'The Infinite Dial 2020 Australia': <http://www.edisonresearch.com/wp-content/uploads/2020/05/The-Infinite-Dial-2020-Australia.pdf>

⁸ <https://www.radiotoday.com.au/australian-podcasting-revenue-2020/>

⁹ <https://www.bandt.com.au/australia-entering-golden-age-podcasting/>

¹⁰ <https://medium.com/the-raabithole/the-future-of-podcasting-is-subscription-lessons-from-the-history-of-media-d486bd693141>

PLATFORMS FOR PODCAST LISTENING

Among podcast listeners, 42% access podcasts mainly through YouTube (see **Figure 3**). This suggests that news consumers consume both audio and video podcasts. About one-third of users listened to podcasts on Spotify (33%), 21% on Apple podcasts, and 16% used ABC Listen.

42% listen to podcasts
on YouTube


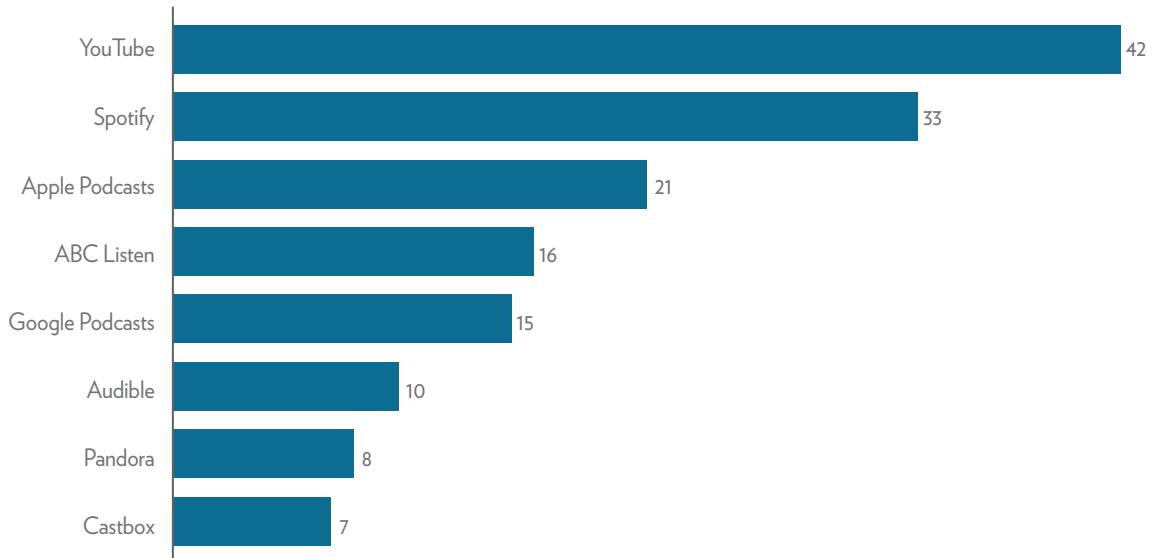


FIGURE 3: PODCAST LISTENERS BY PLATFORM IN AUSTRALIA (TOP 8 PLATFORMS) (%)



POD2. Which of the following apps or websites do you mainly use to find and play podcasts? Base: All that listened to podcasts in the last month [Base= Australian podcast listeners, 692]

Among Australian podcast listeners, YouTube is the most popular platform, followed by Spotify and Apple Podcasts, regardless of genre.

For news, contemporary life and specialist subjects ABC Listen was the fourth ranked platform (see **Table 1**).

TABLE 1: PODCAST PLATFORM USED BY GENRE IN AUSTRALIA (TOP 8 PLATFORMS) (%)

	News, politics, and international events	Contemporary life	Specialist subjects	Sport	Lifestyle
1	YouTube 46	YouTube 39	YouTube 46	YouTube 42	YouTube 44
2	Spotify 33	Spotify 38	Spotify 36	Spotify 35	Spotify 40
3	Apple Podcasts 26	Apple Podcasts 27	Apple Podcasts 24	Apple Podcasts 23	Apple Podcasts 24
4	ABC Listen 24	ABC Listen 20	ABC Listen 17	Google Podcasts 22	Google Podcasts 17
5	Google Podcasts 21	Google Podcasts 15	Google Podcasts 17	ABC Listen 14	ABC Listen 15
6	Pandora 12	Audible 9	Audible 11	Audible 13	Audible 11
7	Audible 10	Pandora 9	Pandora 9	Pandora 13	Pandora 11
8	Deezer 10	Deezer 7	Castbox 8	Castbox 12	Deezer 10

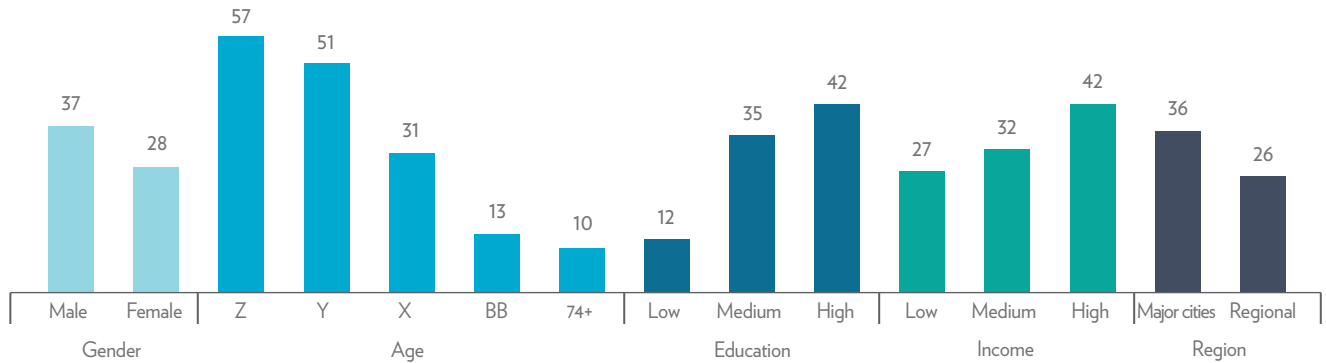
[Base= Australian podcast listeners, 692]

WHO LISTENS TO PODCASTS IN AUSTRALIA?

In Australia, men are more likely to listen than women; 37% of male news consumers listened to podcasts, while 28% of female news consumers listened. Younger people, highly educated news consumers, affluent news users, and city dwellers are more likely to listen to podcasts. Over half of Gen Z (57%) and Gen Y (51%) listen to podcasts while

31% of Gen X and 13% of baby boomers listen to podcasts and only 10% of people 74 years and older. Podcasts are particularly appealing to younger people, and there is a clear relationship between socio-economic status such as educational attainment and income and podcast listening.

FIGURE 4: AUSTRALIAN PODCAST LISTENERS BY DEMOGRAPHICS (%)



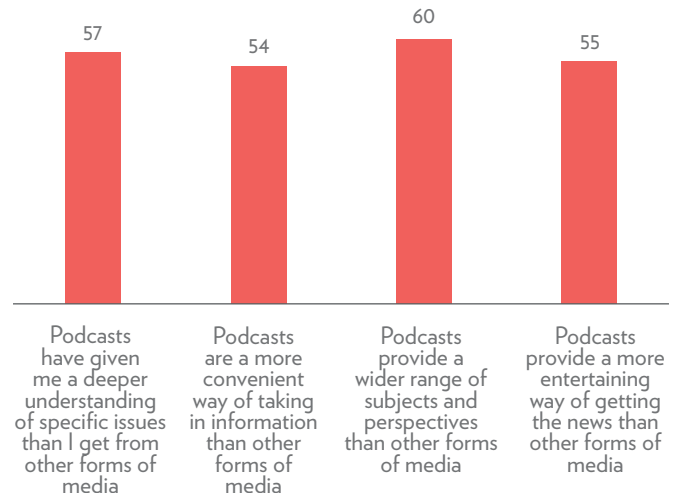
REASONS FOR LISTENING TO PODCASTS

The survey asked respondents why they listen to podcasts by giving four different options and their level of agreement: 1) “Podcasts have given me a deeper understanding of specific issues than I get from other forms of media”, 2) “Podcasts are a more convenient way of taking in information than other forms of media”, 3) “Podcasts provide a wider range of subjects and perspectives than other forms of media”, and 4) “Podcasts provide a more entertaining way of getting the news than other forms of media”.

Australian news consumers listen to podcasts for a variety of reasons. They can get inspired and informed while commuting or working. Some people simply listen to podcasts to entertain themselves at home or on the go. The top reason for listening to podcasts among Australians is because podcasts cover diverse subjects and perspectives compared to other forms of media (60%) (see **Figure 5**). The second most common reason is because podcasts provide listeners with “a deeper understanding of specific issues” compared to other forms of media (57%). More than half of podcast listeners also chose “convenience of taking in information” (54%) and “entertainment” (55%) as the reason they listen to podcasts.

According to the *Digital News Report: Australia 2019*, among Australian news consumers, non-task-oriented motivations including filling empty time or winding

FIGURE 5: REASONS FOR LISTENING TO PODCASTS IN AUSTRALIA (%)



[POD1a] You say you use podcasts, how much do you agree or disagree with the following statements?
[Base= Australian podcast listeners, 692]

down (or relaxing) ranked lower compared to task-oriented motivations such as learning something or keeping updated/informed.¹¹ Not surprisingly, the primary motivations for listening to podcasts varied across age cohorts. For example, 62% of Gen Z listened to podcasts to be entertained, whereas only 35% of baby boomers listened to podcasts to be entertained.¹² This suggests that podcasts are entertaining as well as informative, and that people listen to podcasts to get a range of different perspectives on various issues.

¹¹ Caroline Fisher, Sora Park, Jee Young Lee, Glen Fuller, and Yoonmo Sang, *Digital News Report: Australia 2019*: <https://apo.org.au/node/240786> (see page 105)

¹² Caroline Fisher, Sora Park, Jee Young Lee, Glen Fuller, and Yoonmo Sang, *Digital News Report: Australia 2019*: <https://apo.org.au/node/240786> (see page 106)

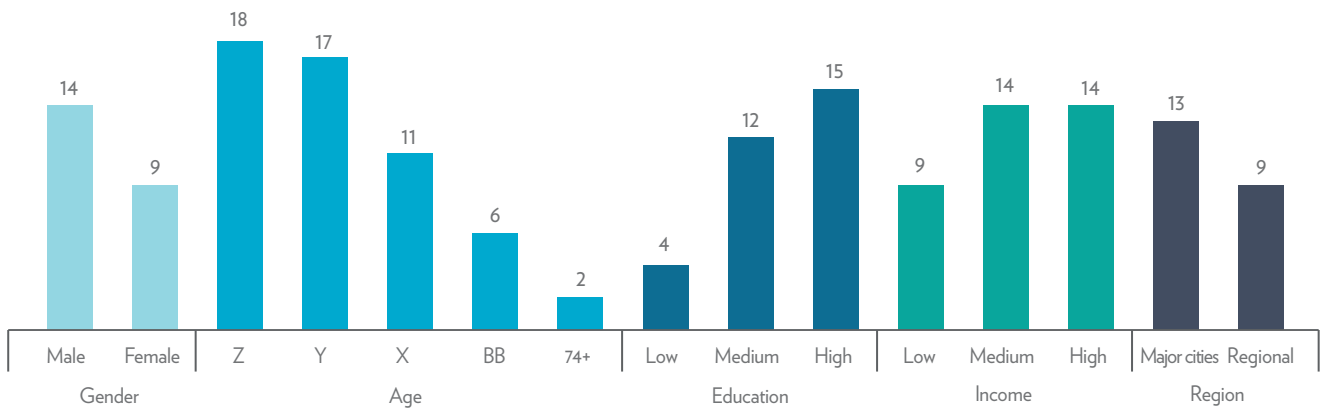
AUSTRALIAN NEWS PODCAST LISTENERS

As aforementioned, 11% of Australian news consumers listen to news podcasts.

Among male news consumers, 14% listen to news podcasts in contrast to 9% of women. Younger news consumers are much more likely to listen to news podcasts (see **Figure 6**). Only 2% of those age 74 or over listened to news podcasts, whereas 18% of Gen Z news consumers tuned into news podcasts. Overall, highly educated, high-income news consumers and city dwellers are more likely to listen to news podcasts.

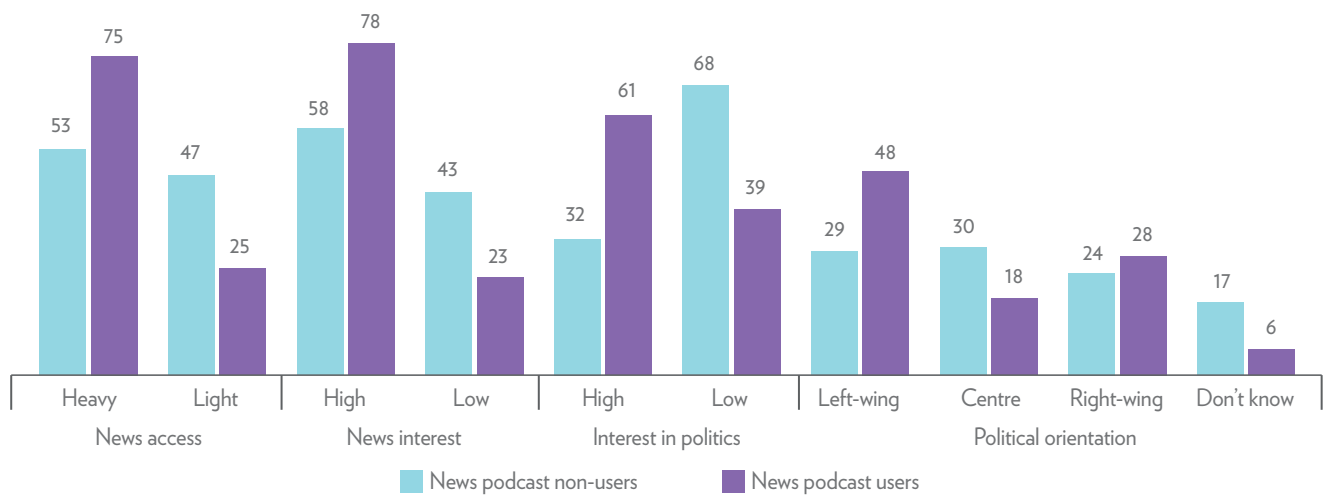
News podcast listeners are also more likely to be interested in news and politics; 78% of news podcast listeners say they are very interested in news and 61% of news podcast listeners have a high interest in politics (see **Figure 7**). News podcast listeners also have a tendency to have a left-leaning political orientation with almost half (48%) identifying themselves as left-wing. In addition, 75% of news podcast users tend to be heavy news consumers.

FIGURE 6: AUSTRALIAN NEWS PODCAST LISTENERS BY DEMOGRAPHICS (%)



Base=Australian news consumers 2131

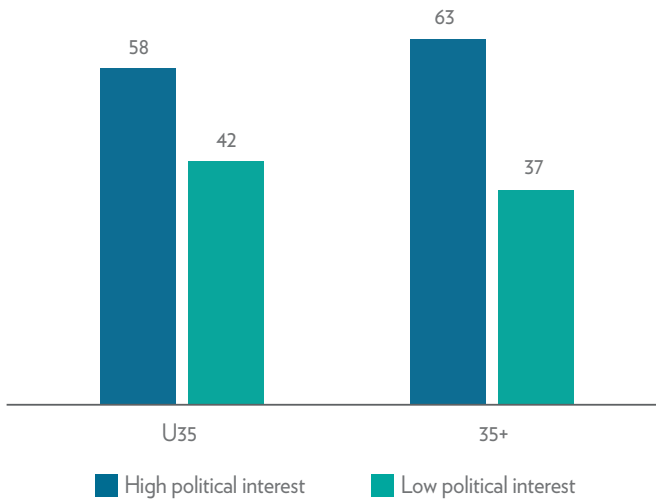
FIGURE 7: AUSTRALIAN NEWS PODCAST USERS VERSUS NEWS PODCAST NON-USERS (NEWS ACCESS, NEWS INTEREST, INTEREST IN POLITICS, POLITICAL ORIENTATION) (%)



[Base=Australian news consumers 2131]

Interestingly, **Figure 8** shows that young people under the age of 35 with low political interest were found to listen to news podcasts more (42%) than those over 35 with low political interest (37%).

FIGURE 8: INTEREST IN POLITICS: U35 VS 35+ NEWS PODCAST LISTENERS IN AUSTRALIA (%)

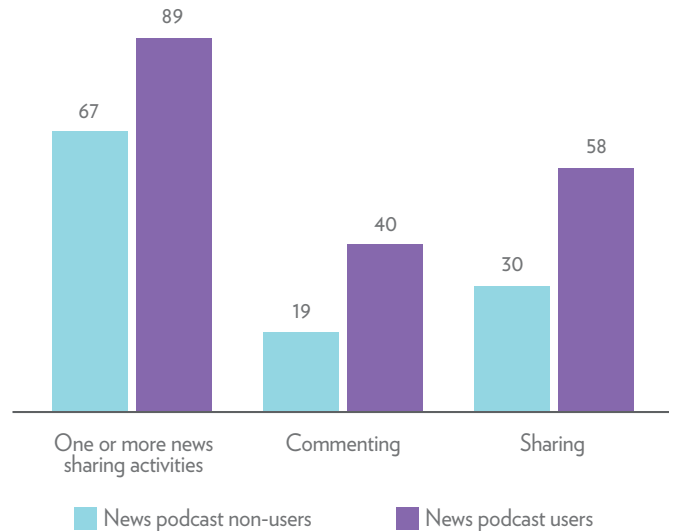


[Base=Australian news consumers 2131]

Australian news consumers who prefer news that shares their point of view (18%) are more likely to listen to news podcasts compared to those who prefer impartial news (11%) and news that challenges their point of view (13%) (see **Figure 10**). This is possibly due to the fact that news podcasts usually include commentaries and opinions of podcasters rather than deliver factual news.

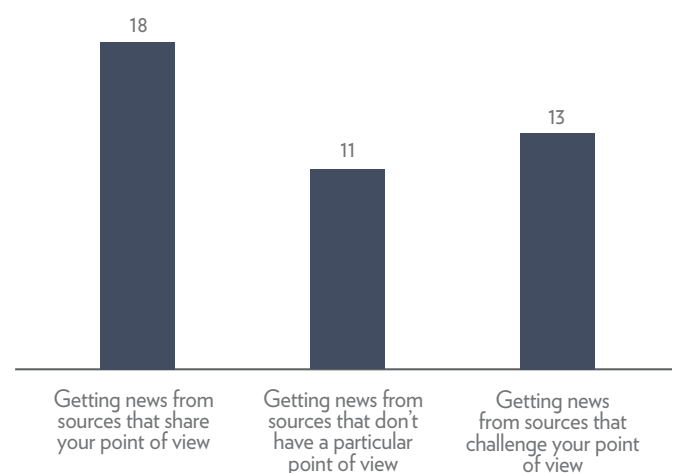
News podcast listeners are more likely to engage with news interaction activities such as sharing and commenting than those who do not listen to news podcasts. Most of news podcast listeners (89%) have engaged in one or more online or offline news sharing activities, whereas 67% of those who do not listen to news podcasts have engaged (see **Figure 9**).

FIGURE 9: NEWS INTERACTION BY NEWS PODCAST USE IN AUSTRALIA (%)



[Q13] During an average week in which, if any, of the following ways do you share or participate in news coverage? Please select all that apply. [Base = Australian news consumers 2131]

FIGURE 10: NEWS PODCAST USE BY SOURCE PREFERENCE FOR NEWS IN AUSTRALIA (%)



[Q5c_2013] Thinking about the different kinds of news available to you, do you prefer <Getting news from sources that share your point of view><Getting news from sources that don't have a particular point of view><Getting news from sources that challenge your point of view><Don't know> [Base = Australian news consumers 2131]

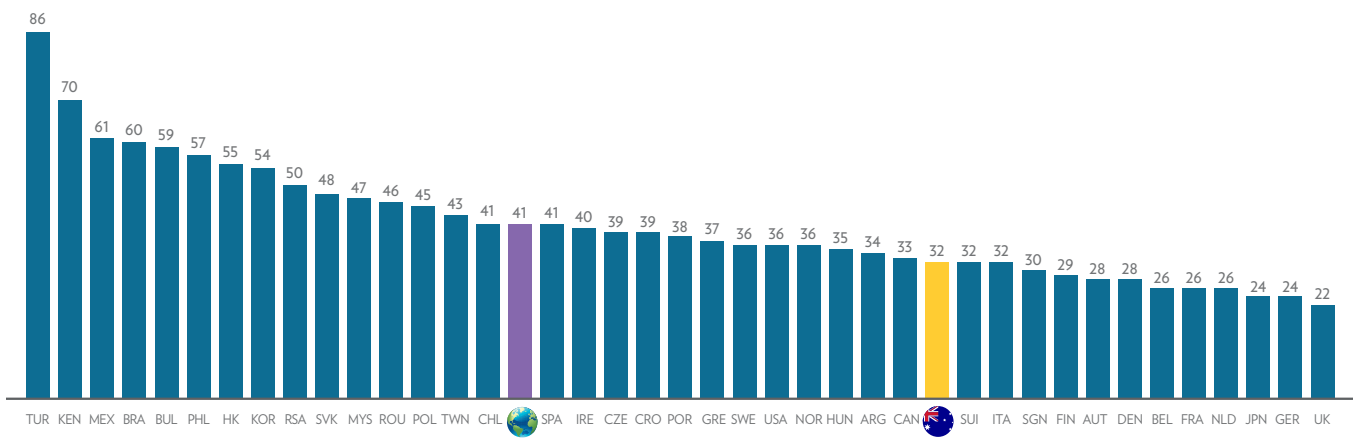
PODCASTING IN THE GLOBAL CONTEXT

Podcasting has been growing rapidly in global markets. As of September 2020, there were more than 1,000,000 podcasts available in the global market, with over 30 million podcast episodes.¹³ We analysed the data from 40 countries to provide an overview of the global trends in podcasting.

In the 40 countries surveyed, 41% of news consumers were listening to podcasts, with Turkey (86%) the highest. Podcast listening was also very popular in countries such as

Kenya (70%), Mexico (61%), Brazil (60%), Bulgaria (59%), the Philippines (57%), Hong Kong (55%), and South Korea (54%), with more than half of news consumers in these countries listening to podcasts in the past month. UK had the lowest level of podcast listening with only 22% of news consumers saying they had listened. In Australia, 32% of news consumers listened to podcasts which is a five-percentage point increase from last year (see **Figure 11**).

FIGURE 11: GLOBAL PODCAST USE (%)

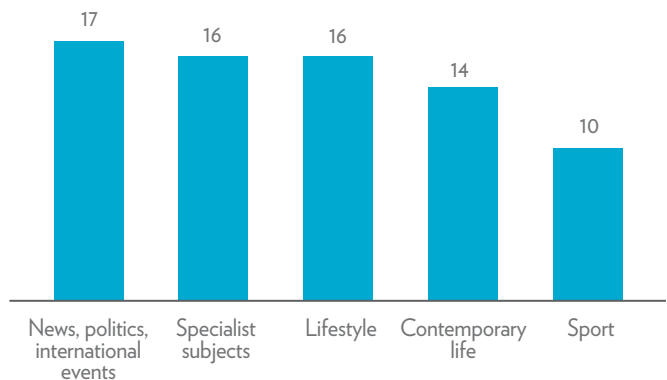


[Q11F] A podcast is an episodic series of digital audio files, which you can download, subscribe, or listen to. Which of the following types of podcasts have you listened to in the last month? Please select all that apply.

PODCAST GENRES

Among different podcast genres, news podcasts (17%) are the most popular globally, followed by specialist subjects (16%) and lifestyle (16%) (see **Figure 12**). In the Digital News Report, comedy was not included as a separate genre. However, according to Edison Research, comedy was the top genre podcast (36%), followed by news (23%), and society and culture (22%).¹⁴

FIGURE 12: PODCAST USE BY GENRE (%)



[Base= 40 countries 80,155]

¹³ <https://www.podcastinsights.com/podcast-statistics/>

¹⁴ <https://www.edisonresearch.com/comedy-news-and-society-and-culture-podcasts-most-listened-to-genres-in-podcasting/>

There is a large variation in the types of podcasts people listen to by country. Podcast listening in general is popular in Asian countries (45%) and among the different genres, news podcasts appear to be the most popular genre (22%). In the Philippines (26%), Hong Kong (32%), South

Korea (27%), and Japan (11%), news podcasts were the most popular podcast genre. Lifestyle podcasts were also popular in Malaysia (23%), Hong Kong (32%), Taiwan (26%), and Singapore (12%).

TABLE 2. PODCAST USE IN ASIAN COUNTRIES (%)

	PODCAST USE	GENRE				
		News	Contemporary life	Specialist subject	Sport	Lifestyle
Philippines	57	26	20	25	12	24
Hong Kong	55	32	19	19	10	32
South Korea	53	27	15	14	14	20
Malaysia	47	22	21	20	11	23
Taiwan	42	18	15	17	7	26
Singapore	30	11	10	12	6	12
Japan	24	11	9	7	7	10
Average	45	22	16	16	10	21

[Base= Japan 2006, South Korea 2304, Taiwan 1027, Malaysia 2013, Singapore 2014, Hong Kong 2023, the Philippines 2019]

We then compared five English-speaking countries. In these countries, the overall podcast listening was lower than the Asian countries with an average of 33% of news consumers using podcasts. Overall, specialist genre was the most popular in these countries (14%). The US had

a slightly different pattern. In the US, news podcast was the most popular genre (19%), followed by specialist subjects (15%). News podcasts comprise about 21% of the most popular episodes in the United States Apple charts, confirming the popularity of news podcasts in the US.¹⁵

TABLE 3. PODCAST USE IN ENGLISH-SPEAKING COUNTRIES (%)

	PODCAST USE	GENRE				
		News	Contemporary life	Specialist subject	Sport	Lifestyle
Ireland	40	13	12	14	11	13
US	36	19	11	15	7	12
Canada	33	13	10	14	7	12
Australia	32	11	11	15	7	12
UK	22	6	6	10	4	9
Average	33	13	10	14	7	12

[Base= Podcast listeners UK 2011, US 2055, Australia 2131, Ireland 2006, Canada 2002]

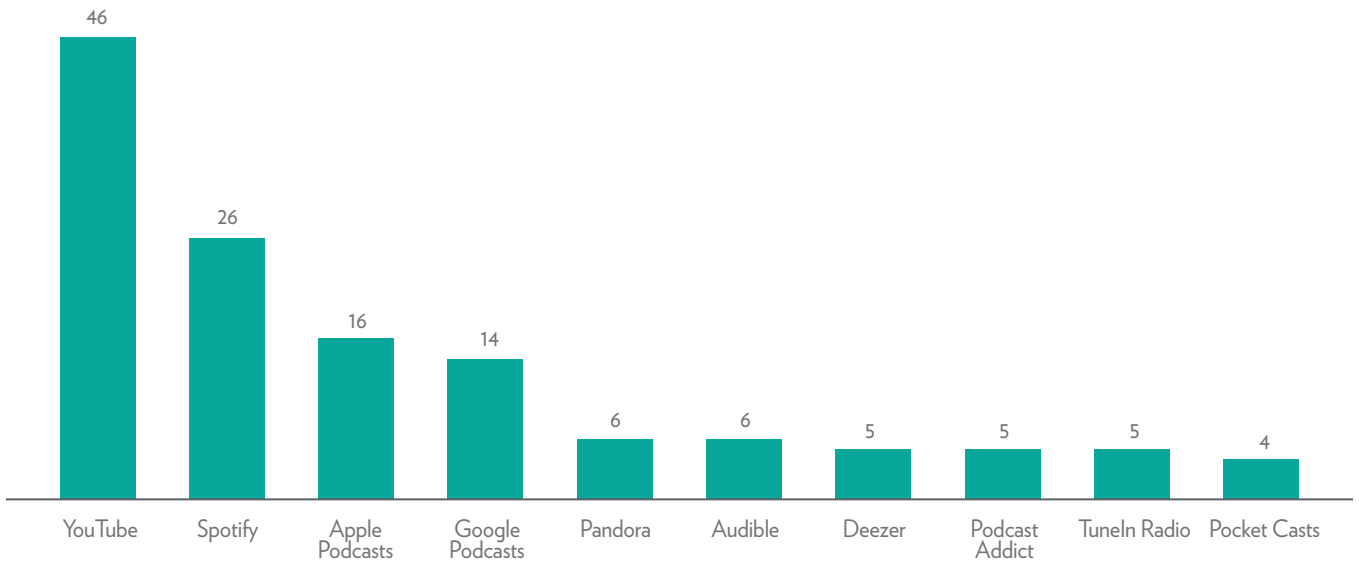
¹⁵ Nic Newman and Nathan Gallo, 'News Podcasts and the Opportunities for Publishers': https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2019-12/Newman_Gallo_podcasts_FINAL_WEB_0.pdf

PLATFORMS FOR PODCAST LISTENING

The global survey included a question on apps or websites used to find and play podcasts in ten countries, including Australia, Canada, France, Germany, Norway, Spain, South Korea, Sweden, the UK, and the US. The top platform people access to listen to podcasts is YouTube (46%), followed by Spotify (26%) and Apple Podcasts (16%) (see **Figure 13**).

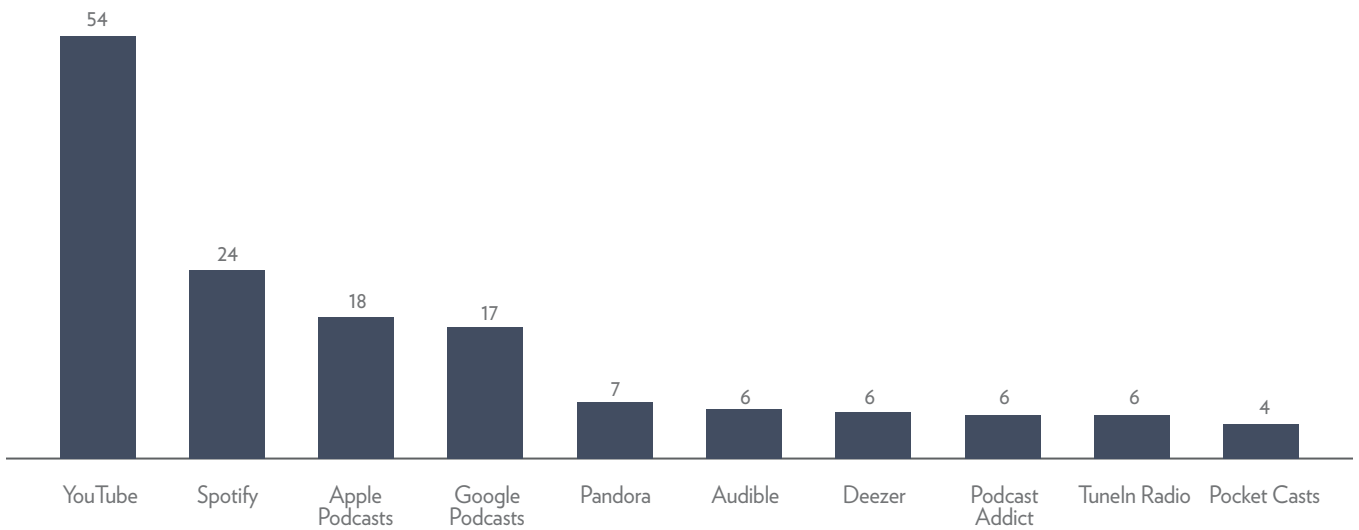
YouTube is even more popular among news podcast listeners (see **Figure 14**). More than half of the news podcast listeners (54%) used YouTube to find and play podcasts.

FIGURE 13: TOP 10 PLATFORMS FOR PODCAST LISTENING (%)



[POD2] Which of the following apps or websites do you mainly use to find and play podcasts? Please select all that apply. [Base = podcast listeners 7,078 (10 countries)]

FIGURE 14: TOP 10 PLATFORMS FOR NEWS PODCAST LISTENING (%)



[Base = news podcast listeners, 2,866 (10 countries)]

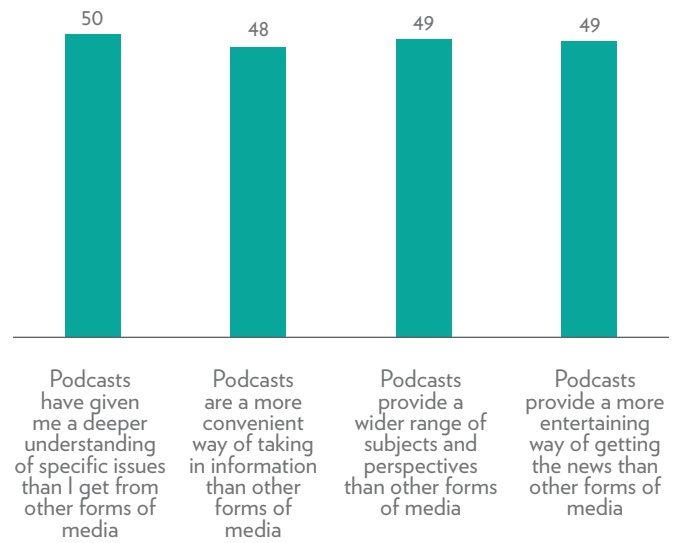
REASONS FOR LISTENING TO PODCASTS

The reasons for listening to podcasts were asked in 19 countries.¹⁶ The most important reason for listening to podcasts was to get a deeper understanding, because of convenience, to gain a wider perspective and to be entertained (50%) (see **Figure 15**).

We compared the reasons for listening to podcasts in Japan, South Korea, Australia, Canada, Ireland, the United Kingdom, and the United States. As **Figure 16** shows, reasons for listening to a podcast differed by country.

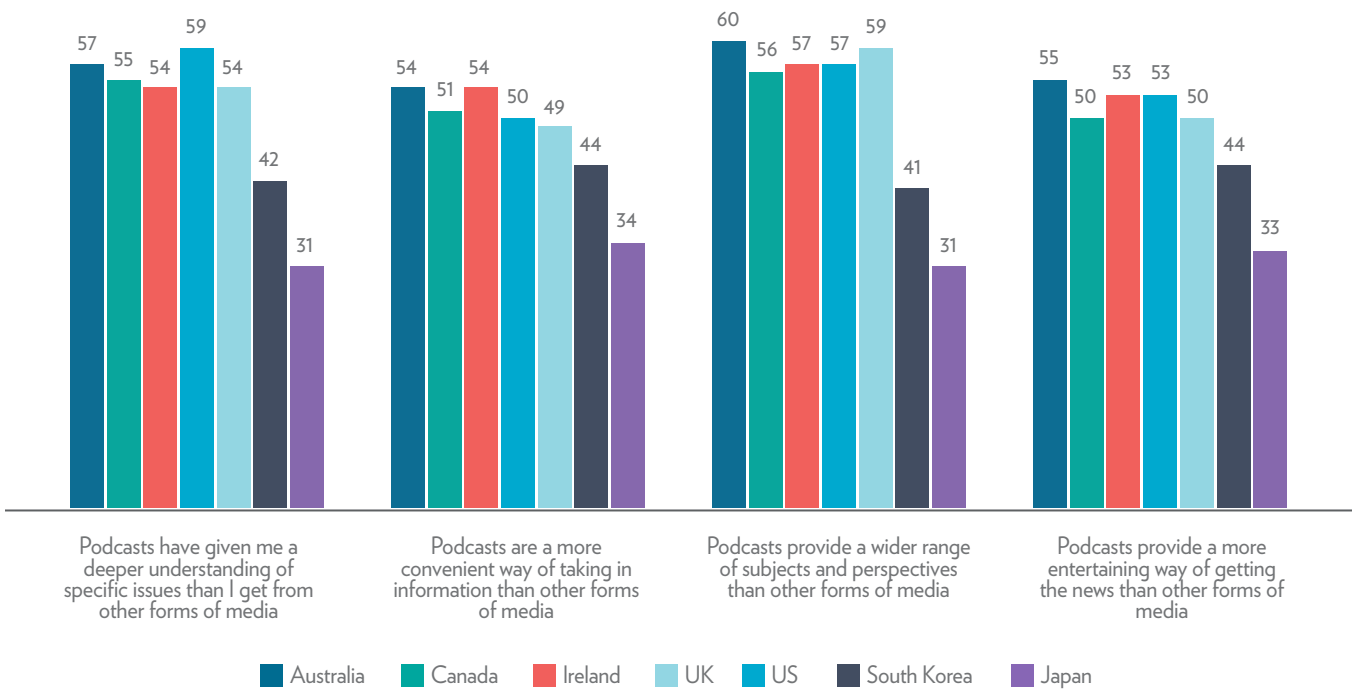
Japanese and Korean news consumers are more likely to think that podcasts are a more convenient and entertaining way of getting news and information than other forms of media. On the contrary, news consumers in English-speaking countries are more likely to listen to podcasts to gain a wider range of subjects and perspectives that they can't get from existing media. News consumers in the US listen to podcasts to get a deeper understanding of specific issues than they might not get from other media.

FIGURE 15: REASONS FOR LISTENING TO PODCASTS (%)



[Base = podcast listeners 12,448 (19 countries)]

FIGURE 16. REASONS FOR LISTENING TO PODCASTS BY COUNTRY (%)



¹⁶ UK, US, France, Germany, Denmark, Finland, Italy, Spain, Japan, Australia, Ireland, Austria, Netherlands, Belgium, Norway, Sweden, Switzerland, Canada, South Korea

GLOBAL NEWS PODCAST LISTENERS

There was a large variation in the listenership in news podcasts among the countries surveyed. About half of the news consumers in Turkey (49%) reported listening to a news podcast in the last month, while only 6% of UK news consumers listened. In Australia 11% listened to news podcasts (see **Figure 17**).

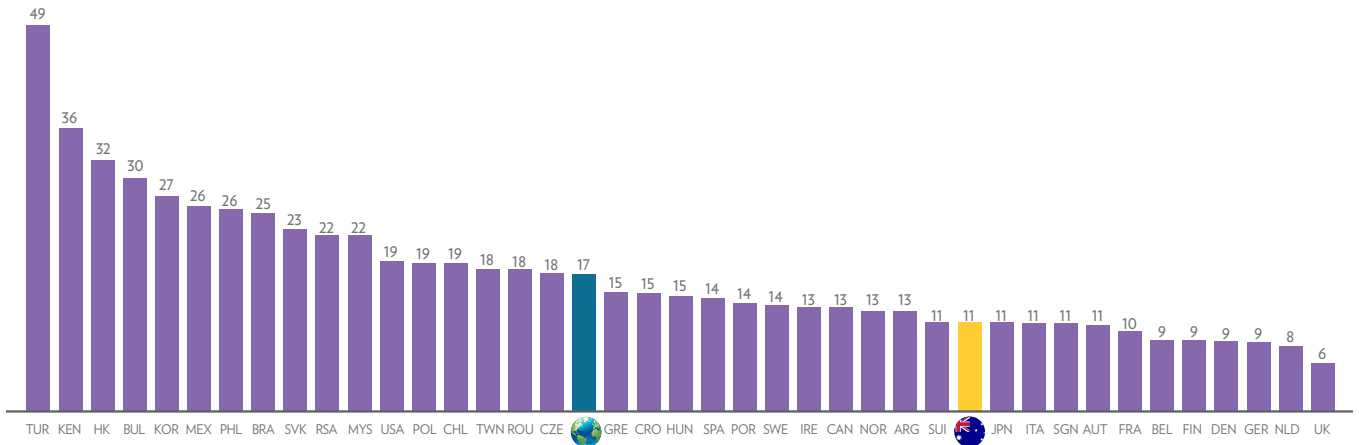


News podcast listening

Global 17%

Australians 11%

FIGURE 17: GLOBAL NEWS PODCAST USE (%)



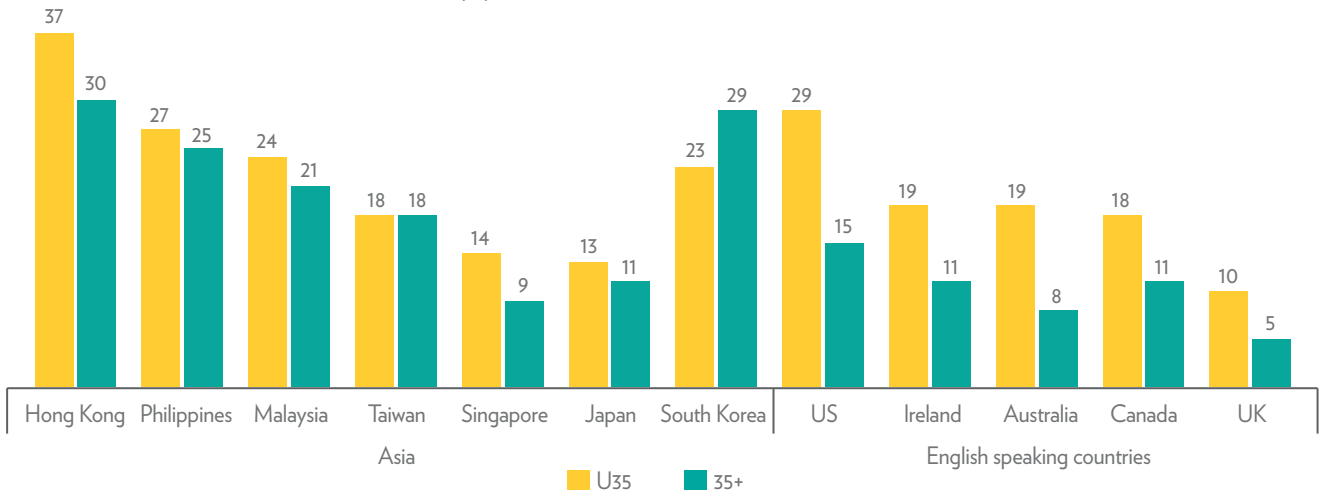
We analysed the demographic characteristics of news podcasts listeners in seven Asian countries and five English-speaking countries.

News podcasts tend to be popular among younger people in the surveyed Asian countries with an exception of South Korea. This is particularly the case in Hong Kong where more than one third of news consumers under the age of 35 (37%) listen to news podcasts. Interestingly, this is not the case in South Korea. Korean news consumers aged 35 or above are more likely to listen to news podcasts (29%)

compared to those under 35 (23%). It is worth noting that South Koreans largely do not trust coverage of mainstream news media.¹⁷

In English-speaking countries, younger news consumers under the age of 35 are much more likely to listen to news podcasts than those aged 35 or above (see **Figure 18**). The age gap is more prominent in some countries like Australia and the US, where the rate of news podcast listening under the age of 35 is twice that of news consumers aged 35 or above.

FIGURE 18: NEWS PODCAST USE BY AGE (%)



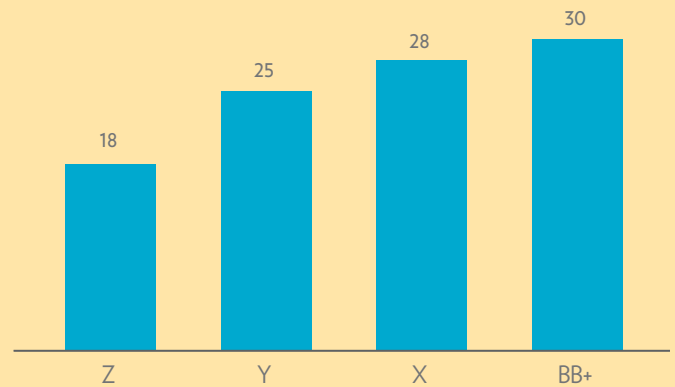
[Base= Podcast listeners Japan 485, South Korea 1232, Taiwan 436, Malaysia 950, Singapore 600, Hong Kong 1120, The Philippines 1155, UK 439, US 746, Australia 692, Ireland 796, Canada 657]

¹⁶ <https://asia.nikkei.com/Politics/South-Koreans-deeply-distrustful-of-domestic-media-Pew-finds>

BABY BOOMERS ARE THE BIGGEST FAN OF NEWS PODCASTS IN SOUTH KOREA

South Korean podcast listeners showed different demographic characteristics compared to other countries. As the case was quite unique, we further analysed South Korean news podcast listeners by age group and found that baby boomers are more likely to listen to news podcasts (30%) than the younger cohorts at almost double the rate of Gen Z (18%). This is in contrast to most countries where podcast listeners are mostly younger generations. In South Korea, baby boomers are the post-Korean War generation who experienced a miraculous economic growth and are currently exerting their influence in the digital content and media markets.¹⁸ They have also gone through political upheavals, witnessing a democratic breakthrough. They are avid news consumers and have high engagement with current affairs. These embedded experiences may have led Korean baby boomers to listen to news podcasts that are quite different from the coverage of traditional news media.

FIGURE A: KOREAN NEWS PODCAST USERS BY GENERATION (%)

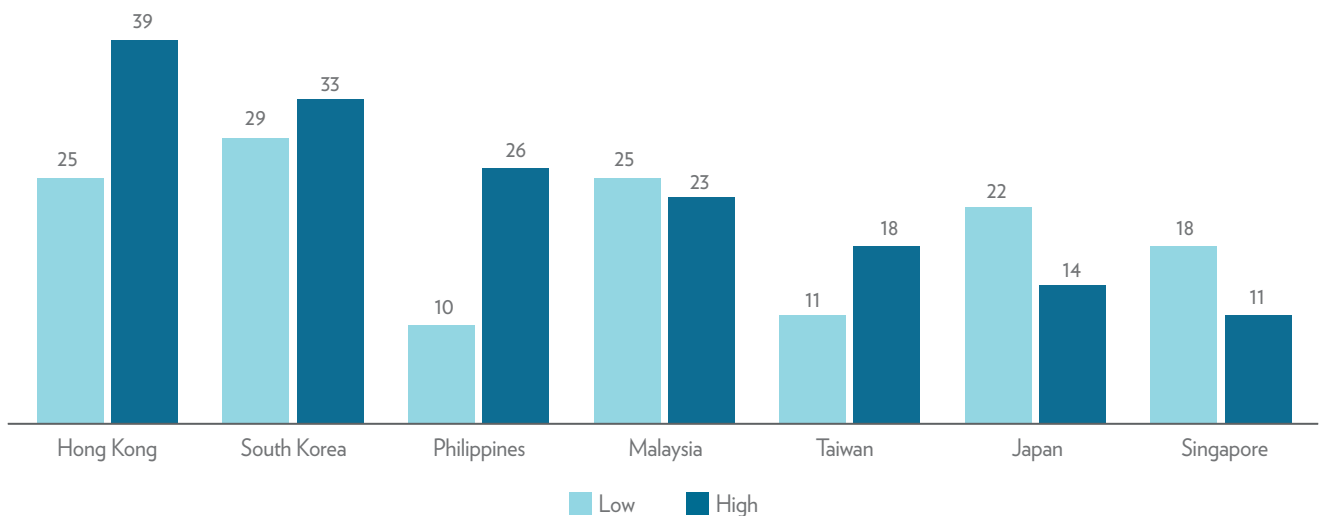


[Base= Korean podcast listeners 1252]

In most countries, podcast listeners tend to be from more advantaged population groups such as high income and highly educated and those living in the city. In a small number of countries, the opposite trend was found to be the case. In Japan and Singapore, those with low levels of education were more likely to listen to news podcasts (see **Figure 19**). In Japan, traditional news outlets are far more popular among highly educated news consumers compared to those with low levels of education. However, the opposite is true in other Asian countries such as Hong Kong, South Korea, Taiwan, and Malaysia, as well as in English speaking countries. Given this pattern,

alternative news sources such as news podcasts may not be so appealing to highly educated news consumers in Japan. In Hong Kong, South Korea, the Philippines, and Taiwan, those with a higher level of educational attainment were more likely to listen to news podcasts. The gap was particularly prominent in the Philippines where 26% of those who have a higher level of education listened to news podcasts, compared to only 10% of those with a lower level of education. On the other hand, education is not a significant factor of influencing the likelihood of listening to news podcasts in countries like South Korea and Malaysia.

FIGURE 19: NEWS PODCAST USE BY EDUCATION (%)



[Base= news podcast listener, Japan 646, South Korea 630, Taiwan 186, Malaysia 450, Singapore 225, Hong Kong 646, The Philippines 519, UK 124, US 393, Australia 241, Ireland 267, Canada 264]
 *Education levels: low (secondary education or below) / high (bachelors or above)

¹⁸ https://www.koreatimes.co.kr/www/culture/2019/11/142_278975.html

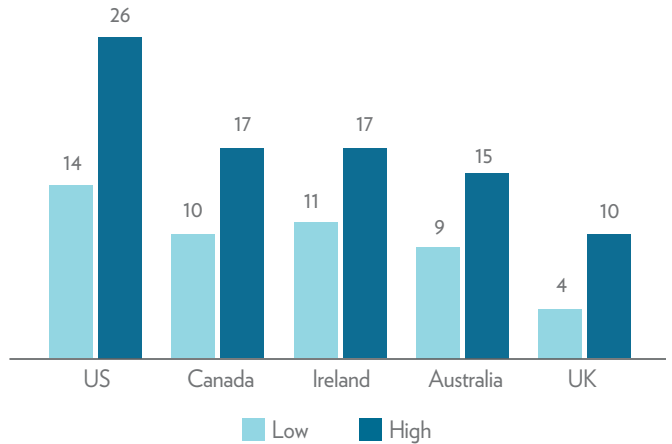
Interestingly, news consumers in English-speaking countries show very similar patterns regarding education levels and news podcasts use (see **Figure 20**). In the five English-speaking countries that were surveyed, those who have higher educational levels are much more likely to listen to news podcasts. The gap was prominent in the US, showing 26% of those who are highly educated listened to news podcasts compared to only 14% of those who had low education attainment.

NEWS PODCAST USE AND POLITICAL ORIENTATION

Similar to Australian podcast listeners, globally, those who are left-leaning in their political orientation are more likely to be podcast listeners; 32% of left-wing consumers listen to podcasts compared to 27% of right-wing consumers.

This was the case in Asian countries and particularly so in Hong Kong. Forty one percent of left-wing news consumers listened to news podcasts, whereas 30% of right-wing consumers listened. The Philippines was an exception with about one-third of both left-wing (31%) and right-wing (31%) news consumers listening to news podcasts.

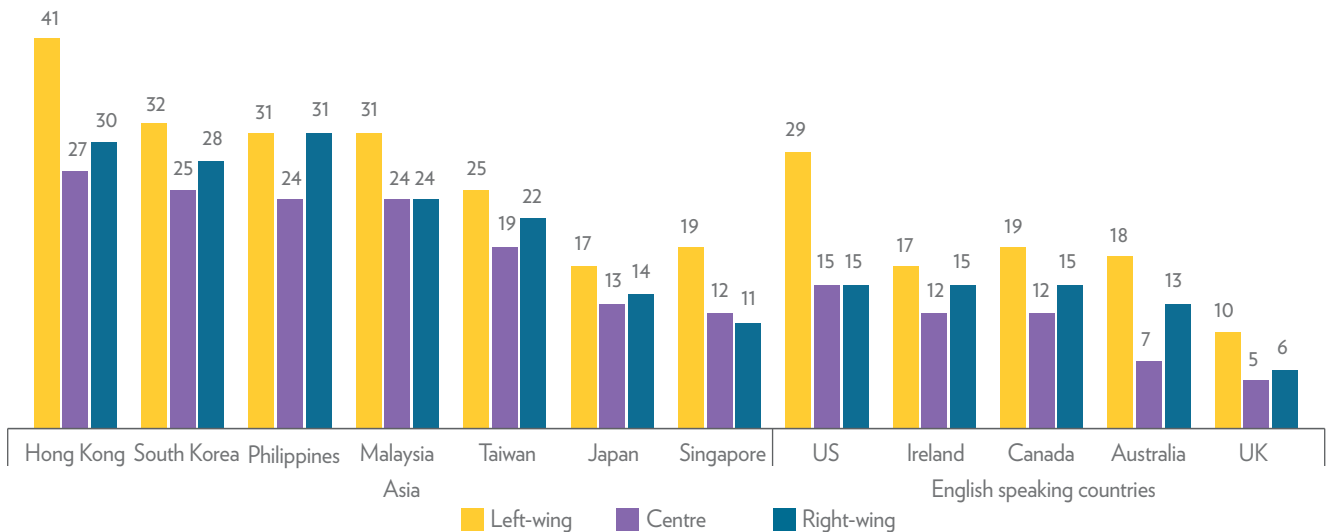
FIGURE 20: NEWS PODCAST USE BY EDUCATION (%)



*Education levels: low (secondary education or below) / high (bachelors or above)

Similarly, the higher popularity of news podcasts among left-wing news consumers was evident in the English-speaking countries, most prominent in the US, with 29% of the US news consumers who identify as left-wing listening to news podcasts compared to 15% of right-wing consumers (see **Figure 21**). Like Hong Kong, the US is going through political turmoil. Interestingly, the listenership gap between left-wing news consumers and right-wing news consumers was largest in the US. Progressive news consumers (29%) were almost two times more likely to listen to news podcasts than conservative news consumers (15%).

FIGURE 21: NEWS PODCAST USE BY POLITICAL ORIENTATION (%)



PAYING FOR PODCASTS

Most podcasts are free to listen to. However, producing a quality podcast requires money and resources, and an increasing number of podcasters are seeking to generate multiple revenue streams as the industry continuously grows.

When compared to spending for Internet ads and even for traditional radio advertising ads, podcast ad sales are still relatively low,¹⁹ but globally, an increasing number of advertisers are devoting their budgets to podcast

¹⁹ Patricia Aufderheide, David Lieberman, Atika Alkhalouf, and Jiji Majiri Ugboma, 'Podcasting as Public Media: The Future of U.S. News, Public Affairs, and Educational Podcasts': <https://ijoc.org/index.php/ijoc/article/view/13548>

programs.²⁰ In addition to ads, podcasts are increasingly making profits through subscription models. For example, Luminary, a podcast network, has recently adopted a subscription model for exclusive shows. Today, podcast listeners are asked to pay 4.99 USD per month to access Luminary's premium podcast programs. Another noteworthy trend in the podcasting industry has been the "platformisation" of podcasts. After a series of acquisitions of podcast companies such as Gimlet Media, Anchor FM Inc., and Parcast, podcast consumption via Spotify has more than doubled and about one fifth of Spotify listeners (21%) use the platform for podcasts.²¹

This year Spotify announced the acquisition of The Ringer, one of the biggest sports and pop culture podcast networks, in an attempt to become "the world's leading audio platform."²² In addition, YouTube is drawing a growing number of podcasters to its platform by giving creators access to its advertising tools.²³ YouTube is also trying to exert its influence on podcast markets based on subscription services such as YouTube Premium, offering profitable pathways towards monetisation. It is also important to note that Patreon, a U.S. based membership platform for creators and their followers, provides an opportunity for podcasters to connect with their royal listeners through a subscription-style payment model.²⁴ As of now, there are more than 6 million monthly active patrons.

In Australia, recognising the opportunity to reach new audiences, some networks such as Network 10 and Channel 7 have recently entered the world of podcasting. PwC predicts the Australian podcast market will grow from \$5 million in 2018 to \$110 million in 2022.²⁵

As shown in this report, young people are drawn to podcasts and they are more willing to pay for podcasts than older people. With its appeal to young audiences, podcast advertising can be effective because advertisers can reach millennials and Gen Z who may otherwise have not been reachable and drive brand preference.²⁶ As far as podcasting is concerned, it would be interesting to see how the subscription-based revenue model and platformisation of podcasts will shape the podcasting industry.

News consumers' likelihood of paying for podcasts was asked about in nine selected countries: Australia, Canada, France, Germany, South Korea, Spain, Sweden, the UK, and the US. Across the nine countries where willingness to pay was asked, 34% of respondents said they would pay for podcasts. This is more than double the figure of the willingness to pay for online news in general (14%). Among the consumers in nine countries, Australian and South Korean news consumers are the most willing with 39% saying they would pay, whereas news consumers in the UK (21%) were the least likely to pay for podcasts (see **Figure 22**). It is worth noting that Korean news consumers' willingness to pay for online news is below the global average, with 10% of Korean news consumers having paid for online news (global average 14%, Australia 14%).

According to the *Digital News Report*, the proportion of British people who have paid for online news is the lowest. As noted in the previous section, in the UK, both podcasts and news podcasts are not as popular as they are in the rest of the world, and this tendency is translated into paying intention. As shown in **Figure 22**, the willingness of consumers to pay for podcasts was relatively low in Sweden (24%), and lower than they are willing to pay for news (27%).

FIGURE 22: LIKELIHOOD OF PAYING FOR PODCASTS VS. NEWS BY COUNTRY (%)



[POD3a] Some providers are starting to ask for payment to access certain types of podcasts. If asked, how likely or unlikely would you be to pay for a particular podcast that you like? Very likely; Somewhat likely; Somewhat unlikely; Very unlikely; Don't know [Q7a] Have you paid for ONLINE news content, or accessed a paid for ONLINE news service in the last year? (This could be a digital subscription, combined digital/print subscription, a donation, or one off payment for an article or app or e-edition)

²⁰ Nic Newman and Nathan Gallo, 'News Podcasts and the Opportunities for Publishers': https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2019-12/Newman_Gallo_podcasts_FINAL_WEB_0.pdf

²¹ <https://www.theverge.com/2020/7/29/21346339/spotify-q2-2020-earnings-podcasts-coronavirus-covid-19-consumption-recovery>

²² <https://www.cnbc.com/2020/02/05/spotify-spot-earnings-spotify-acquires-the-ringer-to-boost-podcasts.html#:~:text=Spotify%20announced%20its%20plans%20to,three%20podcasting%20companies%20last%20year>

²³ <https://www.buzzsprout.com/blog/google-adwords-for-podcast>

²⁴ <https://www.patreon.com/about>

²⁵ <https://www.adnews.com.au/opinion/why-podcast-advertising-is-effective>

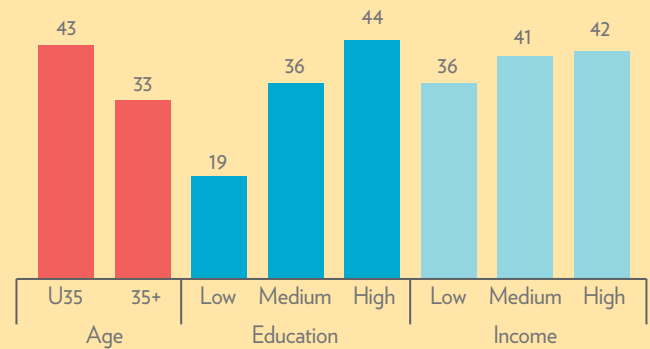
²⁶ <https://www.adnews.com.au/opinion/why-podcast-advertising-is-effective>

WHO IS WILLING TO PAY FOR PODCASTS IN AUSTRALIA?

In Australia, younger news consumers (under the age of 35) are more likely to pay for podcasts (43%) than those 35 and older (33%). News consumers with higher levels of education are more likely to pay for podcasts. There was little difference between middle-income and high-income news consumers (41% and 42%, respectively), but not surprisingly, there was a considerable difference between low-income (36%) and high-income (42%) news consumers. This trend can also be found in people’s willingness to pay for news in general.²⁷

²⁷ Sora Park, Caroline Fisher, Jee Young Lee, Kieran McGuinness, Yoonmo Sang, Mathieu O’Neil, Michael Jensen, Kerry McCallum, and Glen Fuller, ‘Digital News Report: Australia 2020’: <https://apo.org.au/node/305057>

FIGURE B: LIKELIHOOD OF PAYING FOR PODCASTS BY DEMOGRAPHICS (%)



[Base=Australian podcast listeners, 692]

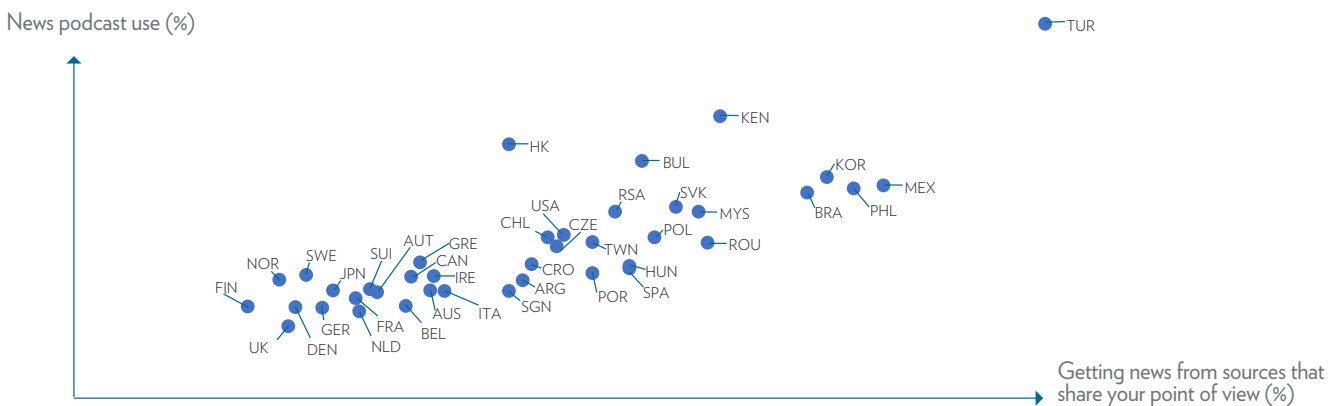
NEWS PODCASTS AS AN ALTERNATIVE TO MAINSTREAM NEWS

We asked respondents their preference of getting news from sources that share their point of view. We examined the average percentage of news podcast use by source preference. News consumers who prefer news that shares their points of view (26%) are more likely to listen to news podcasts compared to those who prefer impartial news (16%) and news that challenges their point of view (22%).

To further explore the relationship between news consumers’ preference of getting news from sources

that share their point of view and news podcast use, we conducted a correlation analysis. As **Figure 23** shows, there is a strong positive relationship between the percentage of news consumers who prefer news that shares their point of view and news podcast use. This is particularly the case for Turkey which holds the highest number of news podcast listeners and news consumers who like to access news that aligns with their worldview. This is another indication that podcasts are serving as an alternative to mainstream news.

FIGURE 23: GETTING NEWS FROM SOURCES THAT SHARE YOUR POINT OF VIEW AND NEWS PODCAST USE



[Q5c_2013] Thinking about the different kinds of news available to you, do you prefer <Getting news from sources that share your point of view><Getting news from sources that don’t have a particular point of view><Getting news from sources that challenge your point of view><Don’t know>
[Pearson Correlation = .824 (p < .001), N=40]

NEWS PODCAST USE AND PRESS FREEDOM

The use of podcasts for news varies between countries, reflecting each country’s political environment as well as media landscape.

We analysed what factors are related to news podcast use at the country level using the *Digital News Report* data from 40 countries as well as other external data including

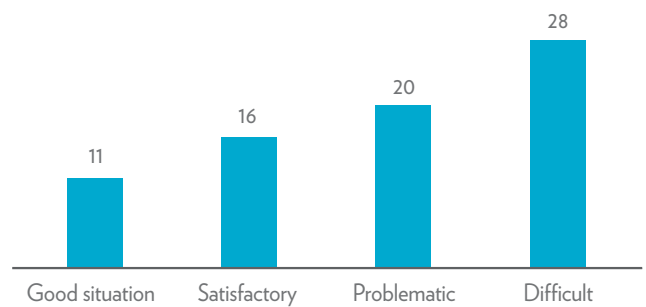
the 2020 World Press Freedom Index scores by Reporters Without Borders (RSF). The Press Freedom Index is based on the total scores allotted to seven criteria: 1) pluralism, 2) media independence, 3) environment and self-censorship, 4) legislative framework, 5) transparency, 6) infrastructure, and 7) abuses. The scores are calculated “on the basis of the responses of the experts selected by RSF combined

with the data on abuses and violence against journalists during the period evaluated”.²⁸ Countries have been given scores ranging from 0 to 100, with 0 being the best possible score and 100 the worst. Full methodological information including the questionnaire is available online (<https://rsf.org/en/detailed-methodology>). The level of press freedom is categorised as follows: 0 to 15 points (good situation), 15.01 to 25 points (satisfactory situation), 25.01 to 35 points (problematic situation), 35.01 to 55 points (difficult situation), 55.01 to 100 points (very serious situation).

Roughly one-third (28%) of people who live in countries with a “difficult” press freedom situation consume news podcasts. News consumers who live in countries where the press freedom situation is “difficult” (28%) or “problematic” (20%) are more likely to listen to news podcasts compared to those who live in countries where the press freedom situation is “good” (11%) or “satisfactory” (16%).

There is a negative relationship between the level of press freedom and news podcast use (see **Figure 25**). News consumers from countries with less freedom of the press are more likely to consume news podcasts. In other words, in countries with low levels of press freedom, a higher proportion of news consumers tend to listen to news podcasts. This suggests that news podcasts are somehow fulfilling the needs of citizens who are dissatisfied with mainstream news media coverage. In Turkey, the country’s social environment may play an important role in driving podcast listenership. Some of the top Turkish-language podcasts are known for their critical views of the government.²⁹ The popularity of news-related podcast platforms in Turkey may be providing an alternative site for the free press.

FIGURE 24: PRESS FREEDOM AND PODCAST USE (%)



* Base = Good situation (9 countries), Satisfactory situation (13 countries), Problematic situation (12 countries), and difficult situation (5 countries) (*Among the 40 countries included in the DNR survey, only one country (i.e., Singapore) was included in the “very serious” category. When we examine the relationship between news podcast use and press freedom, Singapore was excluded from the analysis.)

Interestingly, using data from the International Telecommunication Union (ITU) (2019), Global Mobile Market Report (2018), and the DNR data, we found that news podcast use has a negative correlation with smart phone and internet penetration. In general, news consumers in less-connected countries are more likely to be news podcast listeners with some exceptions such as South Korea.

This report demonstrates that news podcasts are serving as an alternative to traditional news media, covering diverse subjects, providing in-depth reporting, and delivering various perspectives on a wide range of issues. As evidenced by the report, news podcast consumption is influenced by both individual differences and structural factors such as the level of press freedom in a country. Future research on podcasting needs to pay more attention to cultural differences in podcast consumption in general and news podcast use in particular.

FIGURE 25: THE RELATIONSHIP BETWEEN THE LEVEL OF PRESS FREEDOM AND NEWS PODCAST USE



Note: According to the World Press Freedom Index, a smaller score corresponds to greater freedom of the press; Pearson Correlation = .664 (p < .001), N=39 *Singapore was excluded from the correlation analysis.

²⁸ <https://rsf.org/en/detailed-methodology>

²⁹ Nic Newman, Richard Fletcher, Antonis Kalogeropoulos, David A. L. Levy, and Rasmus Kleis Nielsen, *Reuters Institute Digital News Report 2018*: <http://media.digitalnewsreport.org/wp-content/uploads/2018/06/digital-news-report-2018.pdf>



PART 2:

KEY ISSUES AND TRENDS IN PODCASTING: GLOBAL PERSPECTIVES

This section of the report aims to better understand different podcasting markets, covering some of the key issues and trends in podcasting from several countries. The authors are very grateful to the commentators who gave their time to write a commentary that provides a brief overview of each country's podcasting scene. This is one of the most comprehensive reports to date focusing on podcasts. It provides a clearer picture than ever before of how podcasts are currently being consumed both within Australia and globally. We hope readers will find that the commentaries in the report provide valuable insights and perspectives on podcasting.

The commentaries included in the report are presented based on alphabetical order of each region (i.e., Africa, Americas, Asia-Pacific, and Europe) and the commentators' last name.



AFRICA

PODCASTING IN AFRICA: CURRENT AND FUTURE TRENDS

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Whilst in North America, Europe and Asia, podcasts have reconfigured and disrupted the radio sector by opening up new avenues for ordinary people to communicate and broadcast far and wide; this disruptive phenomenon is only beginning to take shape in Africa, albeit at a rather slow pace. This is not surprising given the developmental and digital divide challenges that the continent is still saddled with.

Over the last few years, podcasting has emerged as a veritable site for cultural production and exchange. It has been viewed as providing an opportunity for neglected and under-reported stories to see the light of the day, thereby circumventing gatekeeping practices (corporate and self-censorship) associated with the traditional broadcasting sector. In Africa, where countless stories go unreported because of deep-seated fear of political reprisals, surveillance, repressive official secrecy laws and arbitrary arrests, podcasts were reified as alternative sites of storytelling, uncensored communication and public discourse.

There are several explanations, which have been proffered as to why the podcast sector was going to be disruptive in Africa. Unlike radio, podcasts were expected to meet listener's flexibility and customized needs and expectations. In a continent which has been described as 'mobile-centric' partly because of the mass permeation of the mobile phone, it was also expected to allow to choose, not just when, but also where and how they listen to an episode.

Notwithstanding, the above technologically optimistic evaluations of the potential of podcasts in Africa, reality has since dawned that like previous disruptive technologies podcasts are increasingly become the preserve of the connected, urbanites, digital influencers, mainstream media organizations and individual journalists. This means that those without access to internet and digital technologies are left out of the conversation. They cannot upload and download the content.

At face value, it seems relatively easy to produce and distribute content via podcasts. However, it is important to note that podcasters should have access to a computer, a microphone or mobile phone, and internet in order to download free or cheap software to record and edit their stories. In Africa, this requires reliable access to electricity

and broadband wifi connection.

Instead of opening up spaces for ordinary people, the platform has been occupied by digital influencers, journalists and media organizations. As a result, podcasting has *reproduced and magnified elite continuities*, where traditional voices, who have access to the print and broadcasting spaces have emerged as the major producers of podcasts. This *consolidation trend* is likely to continue as media organizations look for newer alternatives to increase their revenue.

Radio stations such as Jacaranda FM in South Africa have transitioned into the podcast market by constantly uploading its content on SoundCloud. For instance, the *Breakfast with Martin Bester* show achieved over 100 000 downloads in just one day in November 2019. This is not unique to South Africa. iHeartRadio in the US has launched its own podcast app.

As a result, media organizations in Africa looking for ways to diversify their revenue and distribution channels have occupied the podcast market. A cursory analysis of who are the main podcasters in Africa reveals that public intellectuals, journalists, digital entrepreneurs, talk show hosts and broadcasting companies have joined the podcasting bandwagon.

For instance, in Namibia, Gwen Lister, a veteran journalist and media owner, runs her own *#FreeSpeak Podcast*, focusing on freedom of speech and current affairs. South Africa also boasts of a significant population of active podcasters on the continent. Some of the most popular podcasts include: *Sound Africa*, *Alibi*, *First Person*, *African Tech Round-Up* (about technology in Africa), *Amabookabooka* (about South African authors), and *The Sobering* (about South African hip-hop). Genres of these podcasts range from general to niche-based productions focused on a particular market segment.

In Nigeria, there are several podcasts such as *Not Your African Cliché*, *How Nigeria Works (...but doesn't)*, *Jesus and Jollof*, *After the Whistle*, *The Unartiste Podcast*, *My Africa* and many others. These podcasts address a wide range of topics including interviews, chats and banter about various socio-economic and political issues affecting Nigeria.

In Zimbabwe, public intellectual, lawyer and academic, Alex Magaisa has introduced a podcast series for his popular *Big Saturday Read* (BSR), which looks at the complex intersection between law and politics. In Kenya, Dickens Olewe, a BBC journalist based in London also runs a hugely popular edition known as *The Dickens Olewe Podcast* hosted on SoundCloud, Podbean, Podcast Addict and so forth. There are also several other podcasters focusing on politics, financial literacy, culture, entertainment, travel and tourism, sports and celebrity gossip.

Compared to the rest of the continent, Kenyan podcasters are considered to be some of the most *innovative and forward looking* when it comes to dealing with the sustainability of the podcasting sector. Most podcasters in Kenya generally target younger audiences who are very active on the internet and social media platforms. Some popular podcasts in Kenya are *Africanah* (which tackles culture and current affairs), *The Spread* (which deals with sex and relationships), *Kenyan Queer Questions* (which is about lifestyle, gender and culture), *Otherwise?* (it is about politics, economy and society), and *The Benchwamerz* (specializes in sports).

Although the podcast sector has witnessed significant growth in countries such as South Africa, Nigeria, Kenya, Zimbabwe and Egypt, it is important to highlight that the audience figures are generally low when compared to those who use social media platforms (such as Facebook, Twitter, WhatsApp, TikTok and Instagram) on a regular basis.

Like elsewhere across the world, the podcast apps market in Africa is dominated by US-based tech companies like Spotify, Apple and Google. Globally, statistics show that Apple Podcasts has over 60% of the market share in terms of downloads, followed by Spotify with slightly above 6%, Overcast with 2,98%, Podcast Addict with 2,19%, Castbox with 2,14%, Stitcher with 2,06% and Pocket Casts with 1,58%. The rest of the podcast apps have less than 1% of the market share. Clearly, from the above list, *there are no African-based podcast apps on the market*, which indicates that podcasters have to rely on applications from other regions of the world.

Whilst global statistics suggest that 1 in 3 people listen to podcasts, audio listening figures in most African countries are hard to come find.¹ A number of reasons account for this state of affairs. Firstly, there is *no disaggregated data on podcast consumption* in most African countries with the exception of South Africa, Kenya, Egypt and Nigeria. Empirical evidence² in South Africa suggests that 43% of the online population have listened to a podcast in

the recent past. Reasons for this relatively high figure are varied. They include increased awareness of the format, accessibility, better quality content, and easier discovery, which have assisted to drive the popularity of podcasts.³

Secondly, statistics⁴ show that *only 39.3% of people in Africa have access to the internet*. This makes it difficult for podcasters to grow their audience figures. Thirdly, most people rely on social media internet (a partial version of internet). Most mobile service providers in Africa have introduced *data bundles and zero-rated*⁵ services for popular social media platforms, which have fuelled the upsurge of internet connectivity. Mobile phones are the primary way of connecting to the internet for most Africans. Unfortunately, the high data prices have contributed immensely to stunted growth of the online radio sector, as it is generally unaffordable to stream on the go.

Unfortunately, *podcast advertising revenue is still only a fraction of what radio advertising makes in Africa*⁶. However, given the ongoing coronavirus (COVID-19) disruptions, which have been accompanied by the *migration of advertisers from print media towards digital platforms*, it is most likely that interest in podcasting from both advertisers and audiences is going to spike significantly in the short-to-medium term.

As intimated earlier, despite the popularity of mobile phones in Africa, *podcasts have struggled to carve a strong niche for themselves*. There are significant obstacles hindering the growth of podcasts in Africa. Three key ones are *high data costs, language, and low uptake by advertisers*. The high cost of data and mobile phone negatively affects the downloading or streaming of podcasts.

Evidently, there are *several structural factors, which militate against the fast growth of podcasting in Africa*. Unlike in the global North, the high cost of broadband and mobile data negatively affects podcast production and consumption. Because most people in Africa rely on social media bundles to access the internet, it is generally difficult for them to download or stream data heavy content.

Another problem relates to the multilingual nature of the African continent. Most *podcasts on the continent are published in foreign languages such as English, French and Portuguese*. Although English is considered an official language by most African countries, not everyone is able to write and speak in it fluently. This suggests that in the long run podcasters in Africa have to find creative ways of producing content in vernacular language and circulating it via popular social media platforms to reach a wider audience.

There is an urgent need for podcasters in Africa to master the art of using *standard measurement techniques such as IAB v2 to measure their podcast downloads*. A number of podcast analytic systems are already in place which can assist podcasters and advertisers to measure the amount of people who heard a podcast who then went to a website and purchased a product.

In future, we are likely to see a shift in the African podcast scene from an *overreliance on pre-recorded podcasts towards live events*. For instance, in the UK, there is a company by the name of Podcast Live, which has pioneered the push towards embracing live shows.

Furthermore, *high quality and community-building content* is likely to receive more attention as podcasters compete with each other for the advertising cake and fleeting attention of digital audiences. Another future trend will be the development of podcast apps from Africa, *specifically addressing contextual specificities of the continent*. Currently, most podcasters on the continent rely on platforms such as SoundCloud to host their content.

¹<https://whatsnewinpublishing.com/three-key-south-african-podcasting-trends-and-why-they-matter-to-publishers/>

²https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2019-06/DNR_2019_FINAL_0.pdf

³<https://www.dailymaverick.co.za/article/2019-07-07-listen-up-there-is-profit-in-podcasting/>

⁴<https://www.internetworldstats.com/stats1.htm>

⁵This practice constitutes a competitive tool for introducing both Internet access and relevant online content to low-income communities, by granting free access to some websites but charging for others, it entails preferential treatment of certain sources of content.

⁶<https://themediainline.co.za/2020/06/podcasting-an-opportunity-for-south-africa/>



AMERICAS

THE PIVOT TO PROFIT IN PODCASTING: WHAT HAPPENS TO U.S. “PUBLIC PODCASTING”?

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Podcasting has finally become a business in the U.S. As its popularity and profitability increase, so do questions about the unique ecology generated by the most popular and successful podcasts—many of them created through public broadcasting.

PUBLIC PODCASTING?

Since 2005, podcasting has grown from what Steve Jobs denigrated as “Wayne’s World for radio” [referring to a movie comedy about goofy teen boys on a home-made access cable show] to a form of media that is a household word today for a third of Americans. Americans spend on average six hours a week, listening to six different shows,¹ and the ad-supported services are usually free. Historically, podcasts have been available on multiple apps through RSS feeds, including Pocket Casts (designed in Australia). The majority of podcast listeners regularly listen to news, and a third listen to educational material.

As in the early years of radio, the pioneers of the form have often been nonprofit actors, seizing upon a new medium to serve underserved audiences in innovative ways. Listeners look ethnically pretty much like the country overall, and they’re substantially younger. A lot of what they are listening to is news and information either produced by public broadcasting—11 of the top-rated, most-listened-to shows² are produced by public broadcasters—or through prestigious or reliable news services (another two). Only two shows in the top 20 come out of the right-wing, opinion-based media universe. (The other five are entertainment.) Compared with the readership of prestige daily newspapers or the audience for public broadcasting, podcasting’s audience is robustly diverse.

The podcasts that make up the majority of the popular shows that emerge from public broadcasting and fact-based news are rich in fact-checked content, relevant to issues of public concern, and go further than the headlines of issues. Along with straight-up news like National Public Radio (NPR)’s *Up First* and the New York Times’ *The Daily*, there are storytelling shows like *This American Life*, economics shows like *Planet Money*, science shows like *Hidden Brain*, and the news quiz show *Wait Wait...Don’t*

Tell Me! True-crime shows like *Serial* and *Crimetown* go beyond sensationalism to ask questions about justice and corruption.

In a recent article in the *International Journal of Communication*,³ my coauthors and I argued that this more-or-less accidental media ecology, which we call “public podcasting,” deserves to be considered as an important asset in the circulation of knowledge in the body politic. We argue that it is part of the essential information ecology for an open society. Furthermore, we argue, it is at risk. Two years ago, we counted 17 such shows in the top 20; it has already declined to 13. And big structural changes are afoot.

COMMERCIALIZATION

Podcasting grew up in a fairly sheltered environment. Many public broadcasting and news entities leveraged their in-house resources or repeated radio content for their experiments in podcasting. Their incentives were about mission as well as money.

Now the podcasting business is pivoting toward profit, attracting new players and an aggressive new business model. NPR recently projected that podcasting would account within three years for 20% of its revenues. *The Daily* reportedly made millions last year, and Slate draws half its revenues from podcasting. Venture capital started showing up in 2018. iHeartMedia, the biggest terrestrial radio broadcaster in the U.S., is aggressively promoting its often-lightweight podcasts on its stations, in hopes to become the most convenient one-stop shop for audio advertising.

The ad business is moving from the direct-to-consumer ads that used to dominate podcasting toward standard ad buys, and away from announcer formats to conventional commercials. Podcast ad revenues grew 48% in 2019,⁴ with healthy growth predicted despite the pandemic for 2020.

PLATFORMIZATION

But the big news is in what scholar John Sullivan calls “platformization.”⁵

Podcasting has always been markedly decentralized. You can pull in an RSS feed on lots of apps. That was actually an impediment to growth—plenty of potential listeners couldn't figure out how they could find podcasts—until the iPod launched. Although Apple became one-stop shopping for many, the podcasts could appear on many other platforms, and do. Google Play has launched its own podcast app; Google Play caches non-Google podcasts, making it impossible to do dynamic ad insertion, which creates an advantage for Google podcasts. Google Play execs believe their service will double podcast listening in the next few years.

Recently, with venture capital, companies like Quake Media and The Athletic have launched subscription podcast services, which lock viewers to one platform the same way Netflix does for movies. Luminary's subscription service, another venture-capital-backed project, launched splashily, with some big names, although it then limped into its first year.

The biggest new entrant, the music subscription service Spotify, came to podcasting with a splash in 2019. It bought Gimlet Media, a podcast production company built by public broadcasting veterans, and made Gimlet's shows exclusive. It also bought Parcast, a high-end storytelling podcast producer and sports media company The Ringer, making their shows exclusive. And then Spotify purchased exclusive rights to the popular *The Joe Rogan Experience*, featuring a sportscentric comedian. In July 2020, Spotify signed a podcast ad mega-deal with huge ad broker Omnicom—a sign of trust by big advertisers in its ability to do targeted, timely ad placement. As well, Spotify now owns Anchor, the largest podcast host service.⁶

In 2020, Spotify's rival Pandora, through its company SiriusXM, entered the subscription-only podcast game. It purchased the podcast host service Stitcher, which also includes the content network Earwolf and an advertising service.⁷

ENCLOSURE

Platformization changes podcasting. The subscription model turns podcasting into paid-for content, and the subscription model puts the bottom line over the informational mission in a way that podcasting hasn't rewarded before. Fluffier, cheap programming in top listening categories such as comedy, true crime, and sports, is expanding. Listeners are both milked for their data and manipulated through predictive algorithmic programming—something Spotify, Pandora and Google all are really good at. Their data is also monetized; a platform can finally offer advertisers the kind of granular targeting that make Facebook and Google dominate the current ad market.⁸

A platform also controls the relationship with producers too, different from the decentralized, RSS-feed era. Platforms control the producers' terms of access to the service; Amazon's forthcoming podcast hosting service will not even let you criticize Amazon. They can remove your podcast for any reason, including spurious copyright claims, as Anchor did to one podcaster. And even when a platform carries other podcasts as well, it can algorithmically, and through techniques like Google's caching, favor its own podcasts.⁹

Public broadcasters in the U.S. don't currently have a response to the corralling of producers and listeners alike, although NPR works hard to create aggregated sites like NPR One. Public broadcasting might still have time to protect the fragile ecology of public broadcasting. That way, its early and experimental gains for public knowledge and action can become a resource for a robust civic media culture. But such protection would also probably take an investment from a government committed to an educated citizenry and a functional, diverse media environment.

¹ Edison Research (2020), *The Infinite Dial 2020*, available at <https://podnews.net/article/anchor-automatic-delete-accounts>

² Podtrac Analytics (2020), *Podcast Industry Ranking: Top Podcasts*, available at <https://analytics.podtrac.com/podcast-rankings>

³ Aufderheide, Patricia, Lieberman, David, Alkhallouf, Atika, and Ugboma, Jiji. "Podcasting as Public Media: The Future of U.S. News, Public Affairs, and Educational Podcasts." *International Journal of Communication* [Online], Volume 14(27 February 2020). For information referred to here before 2020, kindly consult this journal article.

⁴ Interactive Advertising Bureau (July 13, 2020), *IAB U.S. Podcast Advertising Revenue Study: FY 2019 & 2020 COVID-19 Impact*, available at <https://www.iab.com/insights/iab-u-s-podcast-advertising-revenue-study-fy-2019-2020-covid-19-impact>

⁵ Sullivan, John (2019, May 6). The platforms of podcasting: Past and present. *Social Media + Society*, 5(4), 1–17.

⁶ Weissbrot, Alison (July 8, 2020), "Omnicom's \$20M Spotify Buy Proves Better Measurement Draws Big Brands To Podcasting," *Ad Exchanger*, available at <https://www.adexchanger.com/digital-audio-radio/omnicoms-20m-spotify-buy-proves-better-measurement-draws-big-brands-to-podcasting/>

⁷ Anonymous (July 7, 2020), "SiriusXM 'to buy Stitcher,'" *Podnews*, available at <https://podnews.net/update/a-stitch-in-time-for-siriusxm/>

⁸ Anonymous (July 15, 2020), "Leo Laporte/Wil Williams/Tracy Clayton/Samantha Bee," *Inside Podcasting*, available at <https://inside.com/campaigns/inside-podcasting-2020-07-15-2378>

⁹ Cridland, James (July 23, 2020), "Podcast host terms and conditions," *Podnews*, available at <https://podnews.net/article/podcast-hosts-tos>; Cridland, James (August 11, 2020), "Exclusive: Anchor could automatically delete your account without warning," *Podnews*, available at <https://podnews.net/update/anchor-deletions>

PODCASTS IN LATIN AMERICA: ENTANGLED TRANSITIONS BETWEEN NATIVE MEDIA AND TRADITIONAL MEDIA IN PODCAST CREATION

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Podcast production, distribution, and consumption have skyrocketed in Latin America since 2018. The podcast boom in the region is partially explained by established companies and platforms entering these markets, and the growing interest of brands and advertisers in Portuguese and Spanish-language podcast creation. A recent report published by Voxnest shows that during the first five months of 2020, “the number of monthly active Spanish-language podcasts grew by 94 percent” whereas Portuguese podcasts increased by 103 percent in the same time span¹. Given the rapid expansion of this audio format in Spanish and Portuguese, it is no surprise that the same report indicates Brazil, Colombia, and Mexico made up the top 10 fastest growing podcast creation countries from January to May 2020, surpassing other fast-podcast producer countries like the United States and Spain². Likewise, Colombia, Argentina, Brazil, and Mexico made the top ten fastest growing podcast consumption list³.

In this flourishing digital audio environment, there are two main trend-setting features in Latin American podcasting. The first one has to do with tensions between digital native media and traditional media’s podcast creation in the region. Research has shown that these two types of media hold differences in innovation, timing, practices, purpose, and audiences⁴. Due to the fragmentation of content distribution and consumption, it is also important to recognize that there are key variances among digital native media themselves. The origin of podcasting in the region is attributed to those entrepreneurial digital native media that innovated with digital audio formats and storytelling at the beginning of 2010s. *Radio Ambulante*, for instance, is one of those online native pioneers founded in 2011 that began producing unique digital audio content and podcast chronicles to tell Latin America and its social problems from a different perspective, opening a regional conversation that was very limited before within the boundaries of mainstream national media⁵. Digital native media not only took advantage of the low cost of digital audio production and distribution— even in comparison with other popular online formats such as video— but also they were created with the mission of filling the information gap left by traditional media companies, which did not cover important communities and specialized topics⁶. Given the concentration of power and advertising that traditional media has amassed in

some Latin American countries⁷, digital native media outlets became unconventional sources that provided reliable-plural perspectives⁸. In fact, the emergence of Latin American digital native media gave listeners more choices and the possibility to select new interpretations of their social reality. Users found in these digital native podcast producers the possibility to search, disseminate and interact with content in compelling ways that are distant from conventional radio consumption practices.

Despite the fact that some of these independent podcast producers report more than one million downloads monthly⁹, Rojas and colleagues’ research shows that they are still in “an early phase of expansion and experimentation in Latin America, are a field of interest among entrepreneurs, are small in scale, and they are searching for business opportunities, new relationships with audiences, and strategic alliances with clients” (p. 166). Additionally, the same research indicates that digital native podcast media’s business models and target audiences are still unclear, although content production for private and public organizations, as well as sponsorships seem to be the main revenue sources, and only a few of them consider themselves alternative media¹⁰.

Noticing the fast-growing market for podcasts and the economic instability of digital native podcasters, traditional media organizations and conglomerates in Latin America have become recently major players in podcast creation¹¹. In some cases, conglomerates are gaining ground by adopting early innovations and storytelling techniques implemented by digital native producers. Moreover, mainstream media have been successful recruiting independent producers (and voices) who are looking for more established audiences, institutional networks and platforms to brand their content. According to a report published by the specialized firm Triton Digital, the recent podcast expansion in Latin America is in large part due to mainstream media content production. For instance, from July 6 to August 2, 2020, the Triton Latam Podcast Report showed that *O Assunto*, a Brazilian podcast about news and current events produced by journalist Renata Lo Prete, who works for powerful conglomerate *Radio Grupos Globo*, obtained more than 814,000 weekly downloads, followed by *La Corneta* from Spanish media conglomerate *Prisa Radio* with more than 546,000 weekly downloads.

Also, Triton reported that 37 of the top 100 podcast in Latin America are produced by the Globo Group, 10 from Warner Media, 9 from media conglomerate Prisa Radio, 9 from Audioboom, , 7 from Blue Radio (Colombian Santodomingo Group), and 5 from Peruvian RPP Group¹². Therefore, global media conglomerates have not only understood the growing importance of podcast consumption in Latin America but also they are producing very popular shows that are contributing to the fast-pace expansion of podcasting in this region. Focusing on specialized audio content (News, Science, Health, Society and Culture, etc.) and niche audiences that had been disdained historically, mainstream media are producing now successful podcasts and gaining ground to take control over regional audiences that were previously targeted and served by digital native media producers.

The second characteristic of podcasting in Latin America has to do with the expansion and rivalry among music/ audio content distribution platforms that aim to dominate the Spanish and Portuguese podcast market. Tech giants such as Spotify, Apple and Google are competing furiously to control the regional podcast market, noticing the exponential growth of mobile devices in Latin America and changes in audio-content consumption, particularly among the youngest population who are not attached to traditional radio listening practices. The Voxnest report predicts that during the next few years there will be “a tug-of-war” among these platforms as Spotify continues to grow its podcasting efforts exponentially in the region¹³. With the exception of Venezuela, French Guiana and Cuba, Voxnest states that Spotify controls podcast distribution throughout Latin America. Similar to what is happening in other regions such as in Europe and Southeastern Asia, this trend is explained due to the massive use of Android devices in Latin America, which do not allow users to access Apple’s podcast services. According to Global Stats, from August 2019 to August 2020, Android obtained 88.94% of the mobile operating

system market share in South America while the second competitor IOS only got 10.43%¹⁴. Another important factor that has contributed to Spotify supremacy in the region is that most media corporations and independent podcast producers have come to agreements with non-proprietary platforms, mainly the major player Spotify, to reach broader audiences and reinforce their brands regionally, although some of them have also created their own podcast distribution platforms. Apple and Google, however, continue to claim new territories and they have not given up on Latin America. Therefore, not only do tech giants and their platforms shape podcast production, distribution and consumption, but also the socioeconomic context of the region seems to play an important role in shaping the implementation of technology and the adoption of digital audio content.

¹ <https://blogvoxnest.com/2020-mid-year-podcast-industry-report/>

² <https://blogvoxnest.com/2020-mid-year-podcast-industry-report/>

³ <https://blogvoxnest.com/2020-mid-year-podcast-industry-report/>

⁴ García-Perdomo, V. (2020). Re-digitizing television news: The relationship between TV, online media and audiences. *Digital Journalism*. <http://doi.org/10.1080/21670811.2020.1777179>

⁵ https://verneelpais.com/verne/2020/01/07/mexico/1578358201_643869.htm & <https://radioambulante.org/>

⁶ García-Perdomo, V., & Magaña, M. I. (2020). The adoption of technology and innovation among native online news media in Colombia. *International Journal of Communication*, 14, 3076–3095. Retrieved from <https://ijoc.org/index.php/ijoc/article/view/12124>

⁷ Mastrini, G. & Becerra, M. (2011) Structure, concentration and changes of the media system in the Southern Cone of Latin America. *Comunicar*, 36(18), 51–59.

⁸ Tsifti Y (2010) Online news exposure and trust in the mainstream media: Exploring possible associations. *American Behavioral Scientist*, 54(1), 22–42.

⁹ <https://viapodcast.fm/los-100-podcasts-mas-importantes-de-america-latina-segun-triton-digital/>

¹⁰ Rojas-Torrijos, J. L., Caro-González, F. J., & González-Alba, J. A. (2020). The emergence of native podcasts in journalism: Editorial strategies and business opportunities in Latin America. *Media and Communication*, 8(2), 159–170. <http://doi.org/10.17645/macv8i2.2699>

¹¹ <https://es-us.finanzas.yahoo.com/noticias/podcast-mas-escuchados-latinoamerica-180448863.html>

¹² <https://estritondigital.com/resources/podcast-reports>

¹³ <https://blogvoxnest.com/2020-mid-year-podcast-industry-report/>

¹⁴ <https://gs.statcounter.com/os-market-share/mobile/south-america/#monthly-201908-202008-bar>



ASIA-PACIFIC

TRENDS AND DEVELOPMENTS OF PODCASTS IN SOUTH KOREA

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THE PODCAST MARKET IN SOUTH KOREA LED BY *PODDBANG*

The rapid growth of podcasts in South Korea is expected to continue for the immediate future. Since the Korea Press Foundation began a survey of podcast users in South Korea in 2016, the number of people who used podcasts, including during the past week, has shown consistent increases.¹ Among podcast users who participated in the 2019 survey, podcasts are found to be the most popular among users in their 20s, followed by those in their 30s. However, among people in their 60s, podcasts are of far less interest.

Since its introduction in 2012, *Poddbang*² has been the leader of the podcast market in South Korea. As of April 2020, *Poddbang* accounts for 76% of the total podcast utilization on Apple podcasts, a global podcast player, with *Naver audio clip*, created in 2018 by South Korea's most influential portal site, following closely behind.³ The total number of *Poddbang* listening times per year was 40 million hours in 2017, 56.83 million hours in 2018, and 174.46 million hours in 2019.⁴ In 2019, 10 million people visited the site and listened to 174 million hours, which was more than triple the 56 million hours in 2018.⁵

Since the South Korean government's social distancing policy was mandated in response to the first confirmed COVID-19 case in the third week of January 2020, the listening time of *Poddbang* has increased exponentially to more than 3.55 million hours.⁶ Beginning in the second week of March 2020, when the number of people confirmed to have the coronavirus began to rise sharply, the listening rate increased 36% in eight weeks, reaching more than 4.83 million hours of listening time in one month.⁷ As of August 2020, *Poddbang* has 18,977 channels.

POPULARITY OF NEWS AND POLITICAL PODCASTS

The popularity of *Poddbang*, similar to other South Korean podcasts, rose because it schedules programming at convenient times in response to the public's high demand for information people want to hear, depending on their political orientation.

Logically, it would seem more likely that the popularity of podcasts would be based on demands for platforms that deliver content aligned with users' political orientation rather than demands for platforms as devices. This trend can be found also regarding a channel named "Naneun Ggomsuda," which is politically liberal oriented. The channel served as an alternative platform for conveying dissenting voices against the conservative administration at that time. With the launch of *Poddbang*, academics paid great attention to the extent to which "Naneun Ggomsuda" pluralized the public sphere and motivated public political participation.⁸ More recently, studies explored the use of podcasts in South Korea, especially regarding the context of the channels' influence on listeners' political engagement and participation.⁹

South Korean podcast users are found to be particularly interested in political podcasts that deal with political news and controversial political topics.¹⁰ This is one reason why news and political podcasts have become so popular since *Poddbang* was launched. Although users have opportunities to listen to a variety of channels that cover different topics, politics-related channels are more popular than channels featuring topics such as lifestyle, economics, science, and sports.¹¹ Politically liberal channels have consistently had the highest listening rate and as of August 2020, six of the top ten channels focus on topics related to politics.¹² Users who are politically liberal are known to use podcasts more frequently for the consumption of news and topics related to politics than those who are politically conservative.¹³ Furthermore, *Poddbang* users consider podcasts to be the most credible channels of news and information.¹⁴

THE TRANSFORMATION OF JOURNALISM LED BY NEWS AND POLITICAL PODCASTS

The podcast market, along with YouTube, has gained greater attention from legacy news media as the podcast and online video platform markets has continued to grow.¹⁵ The number of people who view online video platforms not only for entertainment but also for news and political information is predicted to continue to grow. There are several reasons for the popularity of podcast and online video platforms. One is the public perspective that the channels are more credible than legacy news

media because South Korea's legacy news media are considered to lack balance and accuracy.¹⁶ Additionally, since *Podbbang* was launched, the legacy news media have started to launch their own podcast channels, experimenting with new forms of journalistic practices that are also gaining attention from podcast users. For example, journalists of legacy news media podcasts cover stories suggested by their audiences rather than relying on their own choices or those of their affiliated news organizations.

THE PROSPECT FOR FURTHER DEVELOPMENT OF PODCASTS IN SOUTH KOREA

The podcast market is expected to continue to grow in the future, especially, in South Korea, in response to the following: (1) the expansion of the audio content consumption markets, (2) the expansion of the artificial intelligence (AI) smart speaker markets, and (3) people's increased desire to consume content that matches their own political orientation. Starting with the general elections in April 2020, 18-year-olds cast ballots for the first time in South Korean history. Considering that younger people are more likely to use podcasts and that South Korean podcast users have high demands for political news content, podcasting's impressive growth will likely continue at its current accelerated rate.

¹ <https://www.kpf.or.kr/front/research/consumerDetail.do> (Kim, S., & Kim, W. (2019). A great leap forward 'Digital News Report 2019: Key findings related to South Korea.' Media Issue, Vol. 5, No.3, Korea Press Foundation.)

² <http://www.podbbang.com>

³ <http://www.podbbang.com>

⁴ <http://www.podbbang.com>

⁵ http://www.hani.co.kr/arti/culture/culture_general/935750.html#csidxfd2fc90319b4030a1179bae001cff4a

⁶ <http://www.sisaweek.com>

⁷ <http://www.sisaweek.com>

⁸ Won, S. K., & Yoon, Y. T. (2012). The change of counter public sphere: Case of Nagoomsu. *Journal of Cybercommunication Academic Society*, Vol.29, No.3, 49-81; Lee, K., Lee, Y., Hwang, K., Chae, Z., Cheon, H., & Kwon, S. (2012). A critical analysis of I am a weasel and its implications. *Korean Journal of Communication & Information*, 74-105.

⁹ Min, Y. 2015. Political satire and participatory citizenship: Effects of political podcasts on political participation. *Korean Journal of Broadcasting and Telecommunication Studies*, Vol.29, No.3, 36-69; Byeon, S. H. 2014. Interaction effect of usage of political Pod-casts and political orientation on usages of tv, newspaper, and Internet? *Korean Journal of Journalism & Communication Studies*, Vol.58, No. 6, 90-118.

¹⁰ <https://www.kpf.or.kr/front/research/issueDetail.do> (Korea Press Foundation (2019). Media Users in Korea 2019).

¹¹ <https://www.kpf.or.kr/front/research/consumerDetail.do>

¹² <http://www.podbbang.com>

¹³ <https://www.kpf.or.kr/front/research/consumerDetail.do>

¹⁴ <https://www.venturesquare.net/794957>

¹⁵ <https://www.kpf.or.kr/front/research/consumerDetail.do>

¹⁶ <https://www.kpf.or.kr/front/research/consumerDetail.do>

POLITICAL PODCASTING IN HONG KONG: AT THE CENTER OF A POLITICAL STORM

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Like many places, Hong Kong is home to a variety of podcast programs, such as those related to food, travel, lifestyle and entertainment, etc.¹ However, among all podcasting types, political podcasting is always the focal point of public concern due to the city's distinct political situation. Without a full-fledged democracy and in face of continuing erosion of media freedom, in the past two decades more and more Hong Kong people have turned to online podcasts to seek uncensored political information and critical views. For years, political podcasting has served as an alternative voice to mainstream media and provided checks and balances on the power-holders.

Well-known as the “city of protests”, political podcasting in Hong Kong has long been tied to social movements.² Since the early 2000s, successive waves of contentious social movements have spurred the growth of political podcasting in Hong Kong. Because it was during such heightened political moments that more people felt the need to use political podcasts to make their voices heard; and more people demanded for extra political information unheard in mainstream media. As time passed and technologies advanced, the threshold for podcast production has become substantially lower. What began as a niche activity of politicians, activists and political groups two decades ago has now become a burgeoning media (sub)sector consisting of many newcomers from all walks of life. With the advent of YouTube, nowadays most content creators in Hong Kong no longer rely on streaming technology such as Shoutcast to produce programmes like what their predecessors did. The podcasters have all transformed into YouTubers.

Technological changes aside, what has affected the development of political podcasting the most is of course the city's politics. Most significantly, what just happened in 2019 could be a watershed for political podcasting in particular and Hong Kong politics at large. Last year, Hong Kong experienced arguably the most severe political crisis in contemporary times. What started as an opposition to a government-proposed extradition bill has sparked off an unprecedented mass-scale anti-government movement. The trust between the government and citizens has reached a nadir after prolonged confrontations between both sides. While this political stalemate has not ended yet, it had already impacted the political podcasting in

Hong Kong in some dramatic ways, as will be discussed below.

*First, the 2019 protests have bolstered the popularity of political podcasting.*³ As people have become thirsty for political information and views, the subscription numbers of politically oriented YouTube channels have increased substantially since the onset of the protests. For example, one popular channel, memehongkong, gained over 190,000 new subscribers from June to December 2019.⁴ Another well-received channel, Singjai, had its subscribers more than double in the same period.⁵ Such growing popularity has conferred the political YouTubers with the status of key opinion leaders (KOLs). With a broad audience base, it is no exaggeration to say that they could be more influential than mainstream media and even political figures in shaping public opinion. During the movement, their supportive or sympathetic attitudes towards the protesters have galvanized public support for the movement.

Second, public support for political podcasting has become a form of political consumerism. The phenomenon of political consumerism was a by-product of the 2019 protests. Inspired by the idea of identity economics, many movement supporters have been calling for the formation of a “yellow economic circle” (i.e. in Hong Kong politics, the yellow color is associated with the pro-democracy camp) as an alternative economy that could be free from the influence of local capitalists (who are often pro-government) and Chinese capitals. To join the “yellow economic circle”, many political YouTubers have seized the political momentum to rally the financial support of the pro-democracy citizens. Audiences who commit money to their preferred YouTubers see this as a pledge of political support.

Third, political podcasting has become a key site of political contention for different forces. Recognizing the tremendous power of political podcasting harnessed by the pro-democracy camp during the protests, the pro-government/pro-China force has wasted no time to “regain the territory lost”. For example, it has initiated a “KOL 100” plan to groom 100 pro-government YouTubers to contend with the oppositional force. In other words, political podcasting in Hong Kong has become

a contentious site of information war between different political forces.

Fourth, the perceived risk of YouTube dominance has led to diversification of podcasting platforms. As mentioned above, in recent years nearly all podcasters have moved to YouTube. The shift from simple audio podcast to YouTube has benefited the content creators in several ways: enhanced appeal of content (with visual elements), broader audience reach, and advertising revenues. However, the heavy dependency on YouTube also poses a huge risk to them. A case in point was that since early 2020, a number of political YouTubers in Hong Kong have complained that their political commentary videos about the coronavirus outbreak (at that time it was still largely confined to mainland China) and Hong Kong/China politics were often marked with a “yellow dollar sign” by YouTube which barred them from receiving advertising revenues. While YouTube explained that this mistake was due to the inaccuracy of their artificial intelligence (AI) content-filtering system, the YouTubers suspected collusion between YouTube and the Chinese government in suppressing China-unfriendly content by denying their monetisation.⁶ Following this controversy, many YouTubers have become wary of “putting all their eggs in one basket”. Instead of sticking to YouTube alone, they have now diversified their presence on other content platforms such as Patreon.

Finally, political podcasting and media freedom in Hong Kong have to face an unprecedented legal threat in the future. In response to Hong Kong’s social unrest in 2019, the Chinese government has decided to take a hardline approach to tighten control over Hong Kong, with the imposition of a national security law in Hong Kong in mid-2020. While the law is said to only target a minority of people who dare to threaten China’s national security (through subversion, sedition, terrorism, or collusion with foreign forces), it is perceived by many as a legal weapon to silence any oppositional voices in Hong Kong. Soon after the enactment of the law, an atmosphere of “white terror” started to pervade and sweep across Hong Kong. The shock and awe was specifically felt in the media arena. In the wake of the new law, some prominent political commentators shut down their Facebook pages; some political YouTubers expressed their worries, and some even left Hong Kong to relocate in Taiwan. But the most

worrying incident was the arrest of pro-democracy media owner Jimmy Lai in August, only one month after the law had come into effect, on the charge of collusion with foreign forces.⁷ As of the time of this writing, the case is still under investigation. But to many, this high-profile arrest *per se* has already dealt a severe blow to Hong Kong’s media freedom.

To conclude, in Hong Kong, political podcasting rises and falls with the city’s political developments. As long as political conflicts exist, political podcasting will continue to be sought after by the public. Yet at the same time, the conflicts have also created an uncertain future to political podcasting. Most importantly, the prospect of political podcasting in the new national-security-law era remains to be seen.

¹ <https://www.scmp.com/culture/arts-entertainment/article/2157937/podcast-renaissance-has-reached-hong-kong-eight-entertain>

² Leung, D.K.K. (2015). Alternative internet radio, press freedom, and contentious politics in Hong Kong, 2004-2014. *Lawnot/The Public*, 22(2), 196-212.

³ <https://www.scmp.com/news/hong-kong/politics/article/3049377/hong-kong-protests-spur-increase-youtube-political>

⁴ <https://socialblade.com/youtube/user/memehongkong>

⁵ <https://socialblade.com/youtube/user/kowloonsingjai>

⁶ <https://variety.com/2020/digital/news/hong-kong-creators-youtube-coronavirus-1203537882/>

⁷ <https://www.theguardian.com/world/2020/aug/10/hong-kong-media-tycoon-jimmy-lai-arrested-over-alleged-foreign-collusion>

NEWS PODCASTS IN AUSTRALIA – BREAKING AWAY FROM ITS RADIO LEGACY

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Early on, as the podcasting industry was emerging in Australia, the national broadcaster Australian Broadcasting Corporation (ABC) played a major role in its development. Through two initiatives in 2017 - the launch of ABC's Audio Studio, an in-house production hub commissioning podcasts from internal and external producers, and the competitive \$1 million-dollar podcast fund - the national broadcaster seeded content and strengthened the local podcasting industry. Other podcast players similarly had their roots in radio, for example community radio program *All the Best* on Sydney FBi radio showcased young Australian radio and podcast storytellers; and local podcast communities like *Audiocraft* and *Broadwave*, nurtured independent podcast producers. From its early links with radio, contemporary Australian podcasting has expanded into a different ecosystem. In this essay, I will outline how new players are entering news podcasting in Australia, how media companies are getting competition from government agencies and how the link with podcasting's 'radiogenic'¹ past is breaking with contemporary experimentation with news podcasts driven by non-broadcast producers.

The ABC radio program *Conversations* (with Richard Fidler and Sarah Kanowski) is a consistent high performer on the Australian iTunes Top 10 ranking of popular podcasts. *Conversations* is an example of radio programs that transitioned well into a podcast environment. Focusing on in-depth conversations about lived experiences that draws listeners 'deeper into the life story of someone you may, or may not, have heard about'², it's a perfect fit for a medium built around the intimacy of the human voice, in close-up and oft embodied listening experience through headphones or earbuds. The program's mission also aligns with podcast listeners' motivation as highlighted in this Australian News Consumers' Podcast Use report: to be entertained and to learn something new, through podcasts covering more diverse subjects and perspectives compared to other media forms.

Initially, podcasts were predominantly re-distributed radio content. Popular non-fiction radio programs like *This American Life* (TAL) reached global audiences via podcasting. Drawing on radio journalism production conventions and expertise, and extending it to serialised

podcast content, *Serial* (commonly regarded as the starting point of the global podcast movement in 2014) demonstrated how long-form journalistic storytelling was a good match for podcasting.

As podcasting evolves and matures, its tethering to radio is becoming undone. Attracted by the enormous success of *Serial*, successfully illustrating how audio journalism could capture large global audiences and growing revenue, media organisations formally-known-only-as-newspapers joined the news podcast community. The New York Times' *The Daily* single-story news podcast, launched in 2017, was an early global success. In Australia, Schwartz Media's *7am* podcast (publisher of the *The Monthly* and *The Saturday Paper*) and the *Guardian's Full Story* podcast were both launched in 2019.

Another non-fiction genre where broadcasters are getting competition from other media-and non-media-producers is true crime. The Australian juggernaut *Teachers Pet* from 2018 is an example of a highly successful podcast produced by Hedley Thomas, journalist with *The Australian* newspaper. In the 2019 Australian Podcast Awards: Investigative Journalism & True Crime Podcasts category, the contenders were an independent podcast producer, journalists from the *Australian*, the *Sydney Morning Herald/the Age* and ABC journalists. Investigative journalist Richard Baker and his team at the *Age* won the award with the podcast *Wrong Skin*. The former newspaper journalists have successfully made the transition to audio journalism, with help from consulting editors such as Siobhan McHugh bringing decades of radio production expertise to the 'print' team.

A recent example of the changing podcast landscape in Australia is a true crime podcast produced by the NSW Police Force. Known for its prowess in use of social media in communicating with the public, NSW Police Force launched its podcast *State Crime Command* in August 2020. In the show notes, the Police Force explains the podcast's mission, focused on engaging listeners by asking them to help solve crimes:

The NSW Police Force is reaching out to the public seeking information to resolve long standing cold cases, from missing persons investigations to homicides,

*domestic violence and sexual crimes. State Crime Command takes you into the minds of the investigators as they work to close active cases and bring justice for victims.*³

Previously, the Supreme Court of Victoria had won a prestigious Gold Award in the New York Festival's Radio Awards for their podcast about the Victorian justice system. With a mission to explain and provide access to the courts through audio storytelling, the podcast similarly invited listeners to engage and send in questions to Supreme Court judges. These two examples illustrate what a complex task conceptualising the Australian podcast industry is, especially when examining news podcasts. Police and courts are central rounds in news reporting, but although both podcasts are produced using methods common to audio journalism practice, are they news podcasts? Would they be considered in the Investigative Journalism & True Crime Podcasts category of the Australian Podcast Awards? This essay adds another voice to the call to establish a system for classification of podcast genres. A typology would help scholars, industry players and listeners explore and critique this expanding audio ecosystem.

The rapid evolution of podcasting and its penetration into non-media sectors shows loud and clear what a resilient and adaptive format audio is. Radio, and now followed by podcasting, has demonstrated how effortlessly audio seems to metamorphose and reinvent itself to fit with current technological and cultural trends.

Finally, in mapping what types of podcasts Australian news consumers prefer, this report lists: specialist podcasts (15%) followed by lifestyle (12%), news, politics, and international events (11%), contemporary life (11%), and sport (7%). However, Comedy wasn't included in the survey. As podcasting continues to grow in popularity, there is no doubt that new genres and innovative ways to tell audio stories will develop. Comedy is likely to continue to grow. Already, Comedy is the most popular genre amongst young Australian listeners, 14 - 34-year-old, according to ABC's 2019 Podcast Research report⁴. Another area to keep an eye-or ear-on is fictional content. ABC Radio National's new radio program-and podcast-*Fictions* is an indicator of the potential of the genre whilst also a reminder of the golden era of radio drama almost a century ago. The fictional serialised podcast audio drama

Passenger List about a mysterious flight disappearance on route from London to New York won the British 2020 Podcast Awards in the Best Fiction category. Told in the style of narrative journalism, the podcast blurred the lines between fiction and non-fiction storytelling. Not surprisingly, the production team comprised fiction writers and journalists. Expect more to come in this podcast space.

¹ Berry, R. (2006). Will the iPod kill the radio star? Profiling podcasting as radio. *Convergence*, 12(2): 143-162.

² <https://www.abc.net.au/radio/programs/conversations/>

³ https://www.police.nsw.gov.au/safety_and_prevention/policing_in_the_community/podcast

⁴ <https://www.abc.net.au/cm/lb/11563738/data/download-2019-abc-podcast-research-pdf-data.pdf>

CHINA'S PODCAST: AN EMERGING AND PROMISING MARKET

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Before talking about the podcast industry in China, one of the core questions we need to answer is whether podcasts exist in China. This is an interesting and important question as it implies some conflict of understanding in terms of Chinese podcasts. If a Chinese person is asked whether they listen to podcasts or not, the answer is probably “no” as they may not be familiar with the notion of a “podcast”. However, they may tell you there are many audio apps on their mobile.

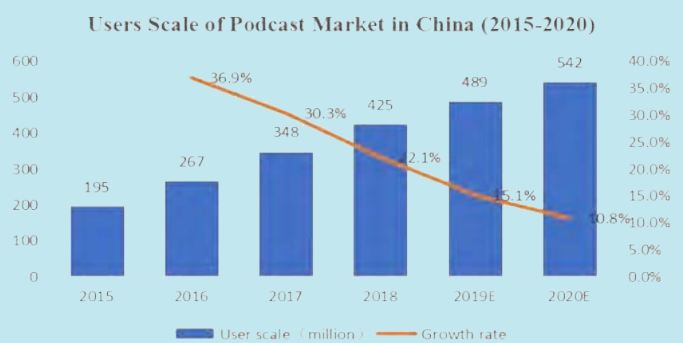
In other words, China's podcast industry is not really podcasting as the West thinks of it, rather, it has its own “Chinese characteristics”. First, the Chinese podcast industry is manifested by its constant platformization.¹ For example, in the U.S. or the Western world, there are separate applications for users in hosting services, program distributors, and RSS subscriptions, however in China, audio platform leaders like Ximalaya FM or Qingting FM have combined all the functions together. These audio platforms are more like an audio YouTube, where users can find all of the services that range from broadcasting programs to audiobooks. Some podcast platforms even expanded their business to live streaming videos, e-commerce, and short videos.

Second, the majority of content in Chinese podcasting is more user-generated than professional generated. In fact, many Chinese podcasters did not have any audio production experience before starting their own podcasts. In other words, the Chinese podcast industry does not have many professional producers like its western counterparts, most of the time, Chinese podcasters regard their audio job as a side project or hobby. Therefore, regular updates or sustainable operations are challenging for most of the amateur podcasters. Though in recent years some qualified content is being generated, most of it is made by professional audio companies or organizations, where their main goals are to make advertisements or expand their social influence.

Third, the Chinese podcast industry is embedded in a larger structure of internet industry, which is characterized by continued commercialization and datafication. Like many other internet platforms, podcasts platforms make revenue by selling ads and membership. A paid membership is preferred by many podcast users as it can help them skip lengthy and annoying ads.

Meanwhile, podcast platforms in China are widely using algorithms and AI technology in content distribution and management. The large amount of data that podcast platforms have collected gives them a head start in market analysis and product monetization.

The last decade has witnessed a rapid development of the podcast industry in China thanks to the prevalence of internet and mobile phone. According to data from iiMeia Research, the number of users in China's online audio market has reached 450 million by 2019. It is estimated that by 2020, the scale of online audio users in China will reach 542 million.² By August 2020, there are more than ten podcast platforms in the market, which include Ximalaya FM, Lizhi FM, Lanrentingshu, Qingting FM, Qi'e FM, Douban FM, Fenghuang FM, AJMIDE, Tingban, and Kuwodushu, etc. Based on their business market orientation, we can divide these audio platforms into three categories: the first is comprehensive audio platform like Ximalaya, in which users can find almost all of the audible functions that one needs; the second is audiobook platforms like Lanrentingshu, which focuses more on the production of digital audiobooks; and the third are audio-based social media platforms like Lizhi, where people can make friends, form communities, and have social interactions through their voices there.³



Source: Iimedia Research, Report on Chinese Audio Platforms, 2019

As the podcast industry in China is still in its early stages, audio platforms are actively competing with each other to expand their market share and currently, it is hard to have a dominant platform. Until now, the top three podcast platforms in China are Ximalaya FM, Lizhi FM, and Qingting FM. In 2019, the daily active users in all the three platforms have exceeded 30 million.⁴ There is no

doubt that China's podcast market is great and promising. In order to attract more users, podcast platforms in China are trying various strategies to cultivate users' loyalty and attachment to their apps. However, as China has a developed its own distinctive internet ecology, the future development of its podcast industry may also manifest interesting trends compared with its western counterparts.

Revolving around this point, the first debatable question is that if the Chinese podcasting industry could have its own *Serial* in the future. As we all know, high quality and professionalism are regarded as important premises to run one's podcast, however, it may not be the case in future Chinese podcasting if we take an audience's use habits into consideration. In China, the audience's attention is occupied by different forms of apps, so in turn, the possible time a user gives to audio platforms is limited. If this is the case, then providing users with short, interesting podcast programs will be more effective than cultivating their habit of listening to long, deep investigative content in terms of market expansion. Meanwhile, as short video apps like TikTok, shuaishou and xigua are gaining prevalence quickly in China, it is easier for short audio programs to become popularized in the era of a "short attention economy".

The second question is about the future business model of podcasting platforms. Though it is likely that China is not moving towards the same business model as its western counterpart, this does not mean Chinese podcasts will not take PGCs (professional-generated content) as its destination. For example, currently in China, the Pay-for-Knowledge model has been one of the most popular operation models among audio platforms. According to a report by Penguin Intelligence, 74.2% of internet users in China have ever paid for "targeted professional knowledge".⁵ In the information society, as users' demand for knowledge increases, audio platforms will have more chances to make revenue by creating knowledge based audio products. It is likely that professional and educational podcasts are going to be welcomed by larger audiences.⁶

¹ iimedia, China's Online Audio Market Research Report (2019), accessed August 10, 2020, <https://www.iimedia.cn/c400/65917.html>

² iimedia, China's Online Audio Market Research Report (2019), accessed August 13, 2020, <https://www.iimedia.cn/c400/65917.html>

³ iimedia, China Online Audio Market Research Report (Q1, 2019), accessed August 12, 2020, <https://www.iimedia.cn/c400/64278.html>

⁴ <https://data.iimedia.cn/page-category.jsp?nodeid=24711871>

⁵ http://www.iresearchchina.com/content/details7_43746.html

⁶ Meijun Wang, Forbes, The Future of Podcast Industry in China, accessed August 17, 2020, <http://www.forbeschina.com/technology/543>



EUROPE

PODCASTING IN THE UK: SLOW GROWTH IN A MATURE MARKET

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Although somewhat behind the developments in North America, the podcast market in the United Kingdom (UK) is continuing to mature. Despite growth, the UK has lagged behind nations like the United States and other parts of Europe; in the Reuters Digital News Report 2020 a chart assessing podcast listening showed the UK at the bottom with 22%.¹ I suspect that this is due, in no small part to the presence of the BBC as a provider of public service audio, particularly in the form of BBC Radio 4 as a leading provider of daily drama, comedy, and news. However, podcast listening has now surpassed consumption of CD and downloaded music for the first time, which reflects that audio listening is more about what we rent than what we own. The movement in major markets from Apple to Spotify as a podcast platform is testament to this.

The audience for podcasts is growing, especially amongst younger and middle-aged listeners, although Ofcom suggests this may be slowing in some age groups; but this should be seen against the backdrop of the changed media landscape of 2020² and the impact of Coronavirus on our listening habits. The report also shows the value of podcasting in the coronavirus pandemic, with more than one in ten listening to a Covid-19 related podcast. The report adds that whilst production has been affected by Covid19, the growth in new titles has not slowed down. As in other nations, entertainment remains a popular format, especially among Spotify listeners, but according to additional data from Ofcom around 6% of UK adults consume a news podcast in a typical month.³

Data from both the audience research body RAJAR (2020) and the media regulator Ofcom show that whilst live radio listening is falling in most age groups, podcast listening is growing as part of the audio diet. Although music streaming music platforms are strong among those under the age of 25, accounting for 41% of the weekly share of audio with podcasts accounting for 8%. Within this data some challenges for the UK market begin to emerge, as Ofcom notes that the average podcast listener is only 10 years younger than the average radio listener, the youngest are more likely to be listening to content from Apple and Spotify than from the BBC.⁴ By the time Ofcom published their latest report in August 2020, data began to emerge that the impact of the 'lockdown' was being felt by the media industry. Radio listening fell again to be replaced by music videos, audiobooks, and podcasts

(Ofcom, 2020, p.38). The same report also noted the growth of Spotify as a podcast producer and platform, increasing its number of weekly podcast listeners from 24% in 2019 to 37% in 2020, placing it narrowly behind Apple Podcasts and BBC Sounds in overall market share.

One of the reasons why the UK podcast market feels so different to elsewhere is the presence of the BBC. The corporation as a keen observer of technical developments was an early adopter of podcasting and is again becoming a key player in the UK market via the BBC Sounds platform⁵ as a means to engage younger listeners. During 2020 the BBC repositioned their internal production division as 'BBC Audio' and created a development unit to specifically support podcast work.⁶ Just as Spotify has positioned itself as a major player in the content market, the BBC is making similar inroads in the UK podcast market. It is gaining ground in the UK, but at present talent seems to be migrating to the BBC.

As the reports above suggest, radio popularity among the young is falling. In subsequent reports into the BBC the regulator Ofcom noted the need for the BBC to engage with younger audiences who were moving to commercial or on-demand rivals. In data for the second quarter of the year, the BBC reported an increase in use of the platform, with 136 million plays of podcast and on-demand content⁷ which appear to echo the younger skew of the podcast format. For the BBC this is about securing a future. This movement into podcasting as a distinct form is happening across the UK radio and audio industry, with commercial groups such as Bauer and Global both offering podcast-only content, through dedicated teams that sit alongside their radio brands. There are commercial benefits for brands here as the MIDAS study by RAJAR report that 65% of listeners will listen to the entire episode. This is combined with evidence on the role of audio in brand discovery might explain why the podcast market continues to grow, even if revenue might be down in places⁸ despite predictions for growth pre-lockdown⁹. I can see these departments growing in size and relevance as they grow both online audiences and revenues through podcasting. At the time of writing, a Global podcast is #1 in the Apple Podcast Chart.

The presence of BBC Sounds will help to offer a hub for UK podcasting; even for those who are now making for

it as it draws attention to the domestic market. However, it creates a different picture for other nations by adding a third audio platform; one which positions itself as a domestic hub for audio. However, despite attempts to make it younger, the BBC platforms dominate listening in those over the age of 55, but have less than half the number of users of Spotify or Apple in the 18-34 demographic.¹⁰ Outside the BBC a strong independent sector has emerged, both from established production houses and independent producers; especially in comedy. Some of these entrants, such as Listen and Broccoli Content now produce work that spans public service radio, branded content, and advertiser supported podcasts. Notably, Broccoli has also been instrumental in creating the Equality in Audio Pact¹¹, a 5-point agreement aimed at addressing diversity in the audio industries, that has now been signed by BBC Radio, Acast, Spotify, and The Guardian.

Through both BBC-funded content and work from areas such as comedy, a strong UK market is emerging, with an increasing dominance of UK-produced content in the domestic charts. Although consumption lags behind other nations, this must be viewed in the context of a vibrant and competitive radio sector. The increased attention on the medium from events to academic study suggests that more growth is still to come.

¹ https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2020-06/DNR_2020_FINAL.pdf

² https://www.ofcom.org.uk/_data/assets/pdf_file/0010/200503/media-nations-2020-uk-report.pdf

³ https://www.ofcom.org.uk/_data/assets/pdf_file/0013/201316/news-consumption-2020-report.pdf

⁴ https://www.ofcom.org.uk/_data/assets/pdf_file/0026/173735/second-bbc-annual-report.pdf

⁵ Berry, Richard (2020) 'Radio, music, podcasts - BBC Sounds: Public service radio and podcasts in a platform world' *Radio Journal: International Studies in Broadcast & Audio Media* Vol 18(1) pp63-78

⁶ <https://www.bbc.co.uk/mediacentre/latestnews/2020/creative-development-unit>

⁷ <https://downloads.bbc.co.uk/mediacentre/bbc-sounds-q2-2020.pdf>

⁸ <https://www.thedrums.com/news/2020/07/29/spotify-sees-ad-revenues-decline-21-remains-encouraged-growth-podcast-ads>

⁹ <https://thisisdax.com/wp-content/uploads/2019/07/DAX-Whitepaper.pdf>

¹⁰ https://www.ofcom.org.uk/_data/assets/pdf_file/0013/200920/podcast-research-2020-data-tables.pdf

¹¹ <https://www.equalityinaudiopact.co.uk/>

PODCASTS IN THE EUROPEAN UNION: WHY SPOTIFY WILL SHAPE THE FUTURE OF EUROPEAN PODCASTING

Michael Bossetta, Lund University

Two major, ongoing developments are shaking up podcasting. The first is Spotify's entrance to the market, and the second is a rapid consolidation of the podcast industry. While these factors have led to fierce competition over ad revenue in the United States, the battle for podcast supremacy there has had strong knock-on effects in Europe. Most pointedly, all signs point to Spotify emerging as Europe's leading podcast provider, and this has significant ramifications for how the medium will develop across the continent. In this essay, I'll outline why Spotify will exert an outsized influence in shaping the future of European podcasting.

Within one year of offering podcasts on its platform, Spotify swiftly captured the European market. Voxnest estimates that Spotify already attracts more podcast listens than Apple in nearly every EU country¹. This development, while remarkable, is unsurprising for three reasons. First, 74% of Europeans own Android devices², barring them from Apple's podcast services. Second, Europe is Spotify's largest market, constituting 34% of its 299 million users³. Third, Spotify faces surprisingly little competition over its core music streaming business in Europe. Pandora, one of its main American rivals, does not operate in the EU for copyright reasons, and Apple Music suffers from low iPhone penetration.

These structural factors primed Spotify for success in Europe, and none of these structures are set to change soon. Spotify will continue to offer podcasts to an underserved Android market, tap into its European user base of 100 million streamers, and operate in an environment of low competition. Of course, several smaller podcast providers operate in Europe, and many markets themselves on providing localized content in national languages: Ausha and Pippa in France, iVoox in Spain, or Podimo in Denmark.

However, whether any of these companies will be profitable remains unclear. It's probably not a positive sign that the Swedish Acast, one of Europe's largest podcast start-ups, recently received 25 million Euros from the European Investment Bank's "Juncker Plan". The Juncker Plan was established to "provide alternative sources of financing to innovative companies in need of financial support that struggled to obtain a traditional bank loan"⁴.

Like Ausha in France, Acast is propped up by public funds, whereas Spotify recently turned a profit and has a market cap of 50 billion USD.

If anything, the best-case scenario for these European start-ups is to be purchased by Spotify, who has recently shown no reservations in making much larger acquisitions (e.g. Gimlet Media, Anchor FM, Parcast, and The Ringer). Should they refuse an offer, Spotify can either poach their original content by offering podcasters high salaries (as they did with Joe Rogan) or develop an entirely new series (as they did with "The Michelle Obama Podcast"). Although these are American examples, Spotify has already made similar, highly successful moves in Europe. In Germany, it hired the hosts of a retired, popular radio show to pick up their work in podcast form as "*Fest & Flauschig*," and in France, Spotify produced the chart-topping fiction series "*Le Nuage*."

So as I see it, there's little stopping Spotify from becoming the EU's podcast hegemon. The question is: how will Spotify's power shape the future of podcasts in Europe? Here, I offer three rosy scenarios that would bolster the democratic potential of podcasting in Europe, tempered by three, slightly more realistic scenarios based on current market trends.

First, Spotify wields the power to increase the *visibility of podcasts* in Europe, especially in underdeveloped podcast markets like Eastern Europe. Unlike other providers, Spotify can bring new audiences into podcasting via its music streaming service. Using highly resourced, data-driven UX design and a/b testing, Spotify can convert music streamers into podcast listeners, increasing the popularity of podcasts across the continent. However, the conversion of audience streamers to podcast listeners is likely to be driven by entertainment – such as comedy or episodic fiction series – rather than civically meaningful content like news or public affairs. Early data from Germany suggests as much: Spotify podcast listeners prefer comedy (24%) or sports (16%) podcasts, whereas Apple listeners prefer podcasts about news (23%) or society and culture (16%)⁵. Thus, there is no guarantee that Europeans will become better informed citizens if Spotify increases podcast listening across Europe. Although, recent research from Sweden suggests that comedy

podcasts can discuss political issues in relatable ways that promote positive democratic outcomes⁶.

Second, Spotify can *increase the diversity of podcasters in Europe*, especially in countries where native language content is lacking. Spotify's acquisition of Anchor, a free podcast hosting platform, greatly lowers the technical and financial knowledge resources for starting a podcast. With the tagline "The easiest way to make a podcast," Anchor encourages curious individuals to start producing content, and three quarters of Spotify's new podcast releases are hosted on Anchor⁷. Crucially, Spotify's curation algorithms have the power to promote independent content; however, they are more likely to advertise Spotify's exclusive content, especially its shows with major celebrities (for example, Joe Rogan and Michelle Obama). Despite being a Swedish company, Spotify's celebrity contracts in the US will likely contribute to wide scale promotion on the platform, limiting the visibility of independent, European voices in underserved markets.

Third, Spotify offers the potential to *expand the media landscape across European national publics*. Although media systems differ across Europe, the continent as a whole lacks the same unfiltered public debate that Americans exhibit through free speech. For example, the press in Mediterranean countries have historically strong ties to political parties, public service broadcasters in the North adhere to strict norms of impartiality, and journalists in some countries—like Hungary—are experiencing media suppression. Spotify could recruit national figures like radio hosts and journalists to produce exclusive content outside of traditionally rigid media systems, which could in turn inject more unfiltered debate around issues of national or regional relevance. However, it is unlikely that Spotify will invest resources in ways that seek to challenge, subvert, or even improve existing media landscapes. As the recent experiences of other tech platforms show, getting involved with online news publishing can lead to charges of partisan censorship, algorithmic bias, or being hosts for disinformation. While Spotify may fall victim to these allegations in the future, the company is likely to strive to be as apolitical as possible in its podcast offerings by keeping a core focus on entertainment.

Undoubtedly, Spotify will grow the visibility of podcasts, increase the diversity of podcasters, and open up new avenues for public debate in Europe. The extent to which this growth will have democratic implications remains an open question. Yet, Spotify exerts an outsized role in shaping the future of European podcasting. The potential for Spotify to play "Kingmaker" in the podcasting space—either through selecting who to promote or which companies to acquire—is particularly pronounced in Europe. This power could be angled toward promoting a more informed and engaged European citizenry, but the more likely scenario is an influx of entertainment and true crime podcasts aimed at keeping users retained on the platform.

¹ <https://blog.voxnest.com/2020-mid-year-podcast-industry-report/>

² <https://gs.statcounter.com/os-market-share/mobile/europe>

³ https://s22.q4cdn.com/540910603/files/doc_financials/2020/q2/Shareholder-Letter-Q2-2020_FINAL.pdf

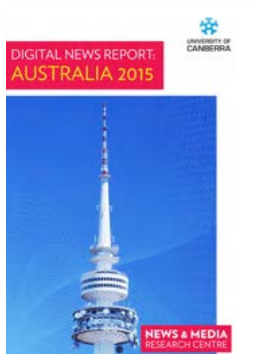
⁴ https://ec.europa.eu/commission/presscorner/detail/en/IP_19_5473

⁵ https://www.wuv.de/tech/spotify_gewinnt_an_bedeutung_apple_verliert

⁶ Ödmark, S. (2019) Making news funny: Differences in framing between journalists and comedians. *Journalism*, Epub ahead of print. Available at <https://journals.sagepub.com/doi/pdf/10.1177/1464884918820432>

⁷ https://s22.q4cdn.com/540910603/files/doc_financials/2020/q2/Shareholder-Letter-Q2-2020_FINAL.pdf

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