Reuters Institute Fellowship Paper

University of Oxford

SO YOU HAVE A PODCAST?
What broadcasters and newspapers are doing with new forms of audio

by Aura Lindeberg

July 2019

Michaelmas, Hilary, Trinity Term

Acknowledgements

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1 Podcasts are everywhere

Working in the media industry in the late 2010s it appears to be impossible to escape the trend of audio. According to Reuters Institute´s Digital News Report 2019, 36% of the audience listen to a podcast every month. However, deeper inspection of the audio boom is still lacking and restricted to internal seminars, popular newspaper articles and a few audio enthusiasts trying to figure out the scale of podcasting.

This research paper will try to provide deeper insight into the podcast phenomenon by looking into the processes and transformations behind the audio boom, as well as interviewing media professionals to gain from their insight about the future of the audio business.
In this research paper, I will describe podcasting as a story of an evolving old media — radio — in the procress of making a fresh start. It is also a story of technological and digital development of media organisations and newsrooms.

The past 15 years of turbulence has profoundly changed the media business. Newspapers, once stable money-making machines, have lost advertisers and struggle with disappearing subscribers. Broadcasters see their young audiences lured into Netflix and YouTube. All media organisations have more or less digitalised their business models to different degrees. In this research paper, I will look into the process of digitalisation and how it applies to the podcast phenomenon, but also focus on the actual process of making a podcast. What does it take to start experimenting with a new type of audio product?

When I started my research, I had several questions on my mind. What is going on in newsrooms that want to start producing podcasts? Why do newsrooms want to hop on this bandwagon and what do they hope to achieve? How will journalists adapt to a new medium and new forms of storytelling? From these questions I formulated three main research questions:

- How are broadcasters and newspapers using podcasts in their media strategies? What are the challenges that emerge as they adopt a new medium, podcasts, in their practices?

- What kind of content or formats are produced and what do media companies know about their podcast audiences?
- How are podcasts evaluated in media companies?

By answering to these questions, I wish to develop a view of the podcast phenomenon in media organisations and also offer some advice for future ventures into the audio business.

1.1 Outline

In this paper, the main aim is to dive deeper into the practical level questions that arise when companies produce and manage podcasts in their newsrooms. It is not a study about business models and monetisation of podcasts. That would need a different approach as well as a different set of questions.

Chapter two deals with the academic discussion on the definition of a podcast and describes the evolution of the podcast industry since the mid-2000s.

Chapter three provides a short overview about the four countries and eight companies investigated in this paper. This chapter also discusses the reasons for these companies to go into podcasting.

Chapter four covers two topics: The audiences of podcasting and the content market in the selected four countries.

To go deeper into the problems of podcasting, chapter five identifies main internal and external problems both broadcasters and newspapers face in developing and producing podcasts and then concludes with some notes on the problem of measuring podcasting.

In chapter six, I discuss what success in podcasting means to the eight companies studied, and how the companies see the podcasting market evolving in their countries.

The ending chapter of this paper draws together the answers to my initial research questions and offers some ideas about future research.

1.2 Methods

I conducted eight interviews with members of staff from four public broadcasting companies and four newspapers in the UK, Australia, Germany and Sweden. This selection of countries and companies allowed me to compare markets and see the differences between countries as well as

between different types of companies. All interviewees had relevant expertise, i.e. they either oversee or directly work with podcasts and audio in their company.

The interviews took place between January and April 2019. Two of the interviews were conducted face to face and the rest via Skype. A list of interviewees is provided in Appendix 2

 In addition to this, I analysed the content of the 100 most popular podcast shows in each country. On two separate days, I collected data from Apple Podcasts on the 50 most popular podcasts in each country . The most popular podcast were categorised for two variables, namely main content category and publisher of the show. This analysis is explained further in chapter 4, together with a discussion on the problems of using Apple Podcasts as a data source.

2 What is a podcast?

Radio broadcasting is the oldest form of broadcast technology. The term implies transmission by radio waves intended to reach a wide audience, and the signal types can be either analogue audio or digital audio. Radio programmes are broadcast from certain channels that compete against each other, and indeed often aspire to reach as large part of the audience as possible.

Podcasting as a technology and as term dates back to 2004, when the word "podcast" was invented by Guardian journalist Ben Hammersley[1] to describe the burgeoning "audible revolution" of independent online radio. The word "podcast" was put together from "iPod" and "broadcast". One of the first journal articles about podcasting was published by Richard Berry. The article *"Will the iPod kill the radio star*?" was published in the journal Convergence in 2006. It became one the journal´s most accessed articles. Central to Berry's question was the, at that point quite new, phenomenon of the podcast. Berry described podcasting as a new technology offering listeners the opportunity to escape the linearity of radio by simply ordering regular downloads of something akin to a radio broadcast. This was thought to be potentially damaging enough to someday cause the radio "star" to fade (Starkey 2017).

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[1] https://www.theguardian.com/media/2004/feb/12/broadcasting.digitalmedia

It is worth noting that, although he profiled podcasting as "radio" in his pivotal 2006 paper, Berry has later changed his view on the medium. In view of the evolution of the medium, Berry (2016) questions the usefulness of hie earlier framework for evaluating a new phenomenon.

In this research paper the focus will be on podcasts, leaving out a number of digital audio products available online. What is meant by the term podcast still varies.
Bottomley (2015)notes that many experts emphasise "time-shifting" (i.e. the ability for listeners to hear the audio "anytime, anywhere" in contrast to the streaming model of broadcasting) as the defining characteristic of podcasting. Further confusion comes from the fact that *podcast* can refer to both the program (or "series") as well as the individual unit (or "episode").

Technical qualities are, however, merely one way of defining the word. According to Cordeiro (2012), radio-audio is now "interactive, (more) participatory, shareable, asynchronous, repeatable, reproducible, searchable, customisable, discontinuous, hypertextual, not linear, convergent and on-demand". It is fair to say that podcasting has developed an aesthetics of its own. Berry (2016) suggests that podcasts have developed features that are distinct from radio – in fact distinct enough to be considered alongside radio, rather than part of radio. He also notes that podcasts are in many senses" hyper-intimate": they are often consumed alone, using headphones, with a human voice speaking directly to the listener. The podcast listener also actively searches for content and puts aside time to listen to the selected programmes. These behaviours and patterns create a privatised and personalised experience that is unique to podcasting.

2.1 iPods and smartphones — technological development

Another way of defining the term podcast is to look at the manner in which the listener engages with a podcast. The rise of Apple´s iPod in the early 2000s was a key factor contributing to the early success of podcasting. It allowed users to create their personalised auditory experience. *Wired* magazine[2] even ran a front page suggesting the "End of Radio" in 2005. Even though radio still has

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[2] Issue 13, 3rd March 2005

not died in 2019, the technological change of the early 2000s kickstarted alternatives to traditional broadcasting.

Later in the 2000s, the growth of smartphone ownership and rise of podcasting apps have been considered by many as factors powering the change towards podcasting. According to Pew Research Center's Internet & American Life Project, in 2015 64% of American adults owned a smartphone, up from 35% in 2011 when Pew first started tracking smartphone ownership (Markman 2015). In October 2018, 77% of American adults had a smartphone. By contrast, Pew found that only 20% of adults owned an MP3 player in 2006. For early adopters of podcasting, listening was frequently a manual process of finding, subscribing to, downloading, and uploading podcasts onto a listening device.[3]

But how many podcasts are there? This is a difficult question, since not all platforms share their data on how many shows are available. Apple still remains the biggest platform, so its numbers might give some scale of the size of podcasting today.[4] In 2014, there were 7 billion downloads on Apple Podcasts. In 2016, that same number was 10.5 billion and in March 2018, Apple podcasts passed the 50 billion mark for all-time episode downloads and streams.

Technological development has enabled listeners to choose content more freely, but to genuinely break through, the podcasting medium needed a hit series. In 2014, it finally happened with the success of *Serial*.[5] The first season of *Serial*, an investigative journalism podcast narrated by Sarah Koenig, investigated the murder of a high school student in Baltimore. Episodes of seasons one and two have been downloaded over 340 million times, establishing an podcast world record that is yet to be broken. As Berry (2016) notes, the success of *Serial* has moved podcasting into a "second age", where accumulated experience has created a sector of professionalised business and spearheaded the movement into the mainstream.

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[3] http://www.pewinternet.org/fact-sheet/mobile/

[4] https://www.fastcompany.com/40563318/apples-podcasts-just-topped-50-billion-all-time-downloads-and-streams

[5] https://serialpodcast.org/

In this research paper I am using the term *podcast* in a liberal sense: podcasts are all non-linear, on demand audio files a user can listen to online or download onto their own devices. They may or may not have had a life in FM radio. A podcast can be as niche as a show about classical music in Finnish, or as popular as *Serial.*

3 Podcasts in four countries

In this research paper, I look at four different podcast markets in four countries: the United Kingdom, Sweden, Australia and Germany. The countries were chosen to represent the different audio markets of the world. My hypothesis was that in all of the countries chosen, there is either a stable market or a growing market for podcasts. The companies chosen are either broadcasters with a history of FM radio or newspapers with experience in producing audio products.

However, researching the podcast market is not easy at the moment. The best numerical data available comes from Reuters Institute´s Digital News Report, which I used to estimate the popularity of podcasts in each country. In addition to Digital News Report´s podcast data, I used data on internet use and smartphone penetration in each country as a baseline for understanding the digital market and readiness for the podcast market to grow.

First, I will give a short overview about all the countries and companies that I investigated and also discuss the reasons why these companies wanted to go into podcasting.
I will then look separately at broadcasters and newspapers across countries to highlight the differences between these two types of companies.

The United Kingdom

78% of the population have access to a smartphone[6]

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[6] https://www.ofcom.org.uk/__data/assets/pdf_file/0022/117256/CMR-2018-narrative-report.pdf

90% listen to the radio on a weekly basis[7]

21% listened to a podcast last month [8]

BBC (the British Broadcasting Corporation)

- The world´s largest and oldest public broadcaster, founded in 1922.
- Principally funded by an annual television licence fee.
- Ten pan-British radio networks and two national radio services each in Scotland, Wales and Northern Ireland. 40 local radio stations across England and the Channel Islands. BBC World Service radio channels in over 40 languages.
- In June 2018 launched its own radio and audio platform and mobile phone application, BBC Sounds.

The Guardian

- A daily newspaper
- Founded in 1821 as Manchester Guardian. Changed its name in 1959.
- Part of the Guardian Media Group owned by the Scott Trust.
- Has an online edition and two international websites, Guardian Australia and Guardian US.
- Has 24 podcast series on Apple iTunes (May 2019).

Sweden

93% of adults have access to a smartphone (2017)[9]

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[7] https://www.ofcom.org.uk/__data/assets/pdf_file/0014/105440/uk-radio-audio.pdf

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

[9] **https://2017.svenskarnaochinternet.se/allmant-om-utvecklingen/internet-i-mobilen/**

62% listened to radio on an average day (2017)[10]

35% listened to a podcast last month[11]

Sveriges Radio

- Public broadcaster, founded in 1925.
- Funded by standard taxation (from 2019 onwards), previously by a licensing fee.
- Four national FM radio channels, 27 regional radio channels and 10 DAB channels distributed through digital audio broadcasting and the internet.
- Has its own radio and audio application for mobile phones, Sveriges Radio Play.

Dagens Nyheter

- A daily newspaper
- Founded in 1864.
- Owned by Bonnier Group.
- Online edition available at dn.se.
- 2 podcasts series available on Apple Podcasts (May 2019).

Australia

88% of adults own a smartphone[12]

82% listened to radio on a weekly basis[13]

27% listened to a podcast last month[14]

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[10] **https://www.mprt.se/sv/mer-om-media/medieutveckling/mediekonsumtion/**

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

[12] www.businessinsider.com.au/smartphones-use-australia-deloitte-2018-11

[13] https://www.cbaa.org.au/sites/default/files/media/McNair%20yellowSquares%20-%20NLS%20-%20Main%20Report%202018%20-%20FINAL-nopg13.pdf

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

ABC (the Australian Broadcasting Corporation)

- Founded in 1923.

- Principally funded by direct grants from the Australian government.

- Four national FM networks, 54 local radio stations, one international service and three digital radio channels.

- Has a mobile phone application, ABC Listen.

The Australian

- Newspaper published from Monday to Saturday.

- Founded in 1964.

- Owned by News Corp Australia.

- Has eight podcast series on Apple Podcasts (May 2019).

Germany

78% of adults own a smartphone[15]

77% listen to the radio on a weekly basis [16]

21% listened to a podcast last month [17]

Bayerischer Rundfunk (Bavarian Broadcasting, BR)

- Founded in 1924 (as Deutsche Stunde in Bayern). It is a member organisation of the ARD consortium of public broadcasters in Germany.

- Principal source of income are licensing fees. In part funded by commercial activity.

- Five FM radio channels and five DAB channels distributed by digital audio broadcasting and the internet.

- Mobile application called ARD Audiothek available for smartphones, covering radio and audio all over Germany.

[15] https://www.bitkom.org/Presse/Presseinformation/Mobile-Steuerungszentrale-fuer-das-Internet-of-Things.html

[16] http://www.radiozentrale.de/studien-und-daten/themen-module/radiohoerer-im-fokus/

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

> **Die Zeit**
>
> - Weekly newspaper based in Hamburg.
>
> - Founded in 1946.
>
> - Owned by Zeit-Verlag Gerd Bucerius GmbH & Co.
>
> - Online edition (Die Zeit Online).
>
> - Own mobile application Zeit Audio, which includes articles from the Zeit magazine (for subscribers).
>
> - 11 podcast series available on Apple Podcasts (May 2019)

3.1 Broadcasters: "I had to ask for an MP3 player just to hear my own show"

All four broadcasters have been involved in internet publishing from early 2000s onwards, publishing their radio programmes for listening online.

All of the companies mentioned an international (mainly US-based) wave of podcasting as a reason to invest more in podcasting. Technological development, e.g. smartphones and headphones as a way of consuming music and audio on the go, was also mentioned as an important factor in the rise of podcasting.

The BBC started publishing audio content online in 2004. The company says it has always seen potential in distributing and adapting content online via RSS. However, because BBC is mandated to do live broadcasting, podcasting remained a secondary form of publishing content for a long time.

The change towards focusing on on-demand content happened through observing the US podcasting boom in 2014–2015 (in the wake of the record-breaking podcast Serial). In 2015, BBC started to invest more in delivering non-broadcasted content that could only be listened to online. At the scale of the BBC's total production, this was not a huge investment, but a step towards creating something new.

Sveriges Radio has also published its radio shows on their website since the mid-2000s. For SR, the turning point was the success of a podcast series called P3 Dokumentär (P3 Documentary). The show, affiliated with Swedish Radio's youth channel P3, covers events in history, trying to contextualise important events by for example interviewing people who were present at the time. The first episode was published in 2004 and the show quickly became popular in Sweden. The success of the show became a trigger for Swedish Radio to genuinely put effort into podcasting, as the company saw listenership grow on the internet. SR made a very conscious decision to focus all digital development work on audio, and not to explore all the opportunities that digital offers. Instead the company concentrated on how text, video and pictures might be used online to support and complement audio.

For Bayerischer Rundfunk, the first wave of podcasting happened around 2006. The company started to archive aired radio programs online. The main purpose of this was to enable people to listen to shows they might have missed on the radio.

In Germany, the second wave of podcasting started around 2016–2018, when many German media companies and newspapers started their own podcasts. This was also when Bayerischer Rundfunk woke up to the podcast phenomenon and started to produce more shows as online-only.

In Australia, the ABC also started their first podcast experiments in 2004 and 2005 by publishing its existing radio shows as MP3 files on the internet. After publishing one of the first shows online, the journalists had to convince their station manager to buy them a MP3 player so they could check that the show had, in fact, been published online.

In 2013–2014, the company could see that audio on demand was growing bigger and moving away from the scheduled programme chart of traditional radio. Combined with the insight that that the audience was listening to online content in a different way, the company saw an opportunity to start creating new types of content — that is, content for a younger audience. ABC assigned a small team of employees dedicated to digital first, on-demand shows. This early experiment resulted in one of the ABC's early podcast successes, a science show called *Science vs*. The show and its host, Wendy Zuckerman, were quickly snatched up by Gimlet, a US podcast company. In 2017, ABC Audio Studios was created to focus neither on the radio schedule nor on or turning radio programs into podcasts, but instead on creating authentic podcasts to suit audiences in their 30s and 40s.

3.2 Newspapers: "We look so much bigger than we are!"

Newspapers lack the technological advantage of broadcasting companies, which through their own digital platforms already have an existing online presence. Thus, the push for newspapers to start podcasting has not evolved from publishing existing content online, but from creating something entirely new.

At the Guardian, podcasting was a thing already back in 2004 — in fact, a Guardian journalist, Ben Hammersley, invented the term in his article about "online radio".[18] The Guardian is one of the first newspapers to get involved in podcasting (an early example includes publishing the *Ricky Gervais show* online). The Guardian's headstart was a result of investing heavily into the internet in general, and also of having employees who were interested in podcasts.

Most of the first shows were subject-based, weekly discussions that "probably sounded much more like radio than podcasts", as the Guardian journalists describe the style of the early days. Like most of the other interviewees, the Guardian describes the current era of podcasting as post-Serial. However, the Guardian interviewees think that the post-Serial era has brought new

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[18] https://www.theguardian.com/media/2004/feb/12/broadcasting.digitalmedia

audiences who are literate in podcasts and also a new line of audio producers who have working experience outside the strong BBC tradition of radio production.

At Dagens Nyheter, the decision to start investing in podcasting was inspired by Sweden´s rapidly growing podcasting market. The newspaper started experimenting with a limited number of podcasts a few years ago, and the "new launch" of its now ongoing three shows was in 2018. The decision of investing in podcasts was backed by the management as a new way to reach audiences. The newspaper saw a clear similarity between its existing newspaper articles dealing with investigative reporting and international politics and the kind of podcasts people were interested in listening to. This resulted in the decision to develop content further to fit the podcast format. Dagens Nyheter also believes that newsrooms should choose their field carefully and not try to do everything. Accordingly, the company decided to focus on podcasts and recently also audiobooks, but step away from television and video.

In Germany, Die Zeit describes itself as still being in the experimental stage with podcasts, although some of its shows have been running for two years. The newspaper publishes 11 shows and has hired two podcast editors tasked with handling the production of podcasts.
In 2017, the newspaper wanted to acquire a bigger share of the German podcast market and launched three new shows.
Some of the podcast content is made and curated in Hamburg and some in Berlin, where the online newsroom of Die Zeit is located.
Although Die Zeit has a growing number of podcast shows and the interviewee describes the current status as "it looks like we are big", they also feel that they are still experimenting to find out what to do next and how to grow. The podcast workflow is not yet institutionalised into the newsroom practices. Some of the push to expand podcasting at Die Zeit has come from competitors, as German newspapers have all picked up audio in the recent years and many new shows have been launched.

At the Australian, the podcast phenomenon sprung from the personal interest of a few journalists. The journalists had no particular audio strategy to work with, but felt a need to take audio more seriously in the newsroom. This led to the journalists pitching some ideas to the

newspaper as well as doing investigative journalism in podcast form, mainly in their own time. Despite the lack of a strategic plan of podcast growth, the audience gained helped to convince the management of the potential in podcasting. Especially the Australian's hit show *Teacher's Pet* from 2018 helped the newspaper realise its potential in podcasting, but the newsroom still works very much on a "case by case" basis without a larger strategy.

3.3 Takeaway: How to build a podcast strategy

First and foremost: Start with great content. It does not matter how good your podcast strategies are if the people do not continue to the second episode, or even finish the first episode.

Have someone to help audiences find your content. For example, the ABC Audio Studios employs a digital and engagement editor. His job is to seek out niche audiences and make sure that content is promoted to the audiences in a "guerilla" sort of way.

Find ways of producing other surrounding content. The problem for audio in a digital world is low shareability compared to video. One option to promote audio content on social networks are audiograms (short videos or still images with audio) or short form videos to highlight episodes. Do not forget to do traditional marketing, i.e. sending out press releases and telling other media about your work.

Podcast to podcast cross promotion is absolutely key. Use it across your shows. Some companies even cross promote each other's shows (e.g. the ABC and the Canadian Broadcasting Corporation) — but only if it fits editorially.

3.4 Conclusion

In all of the four podcast markets, there was a "first wave" enabled by technology in the early 2000s, which mostly meant publishing FM radio content online or trying out online-only content. The demand for podcasts and the output of content stayed more or less the same between 2004

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and 2014, when the "second wave" began, following the US hit podcast series *Serial*. Only after this did podcasting become an interesting medium to invest in, or to develop further to find a distinct voice separate from radio content.

Newspapers and broadcasters both felt a push from the "outside" (in most cases, US media companies) to invest time and money into podcasting. The decision to do so was, mainly, not made at the level of upper management, but rather emerged as experiments or pet projects by a few enthusiastic employees.

Few companies said they had a podcasting strategy to begin with. The early podcasting stage was mostly defined by doing what was possible with limited resources in the newsroom, and by vague thoughts about what the audience might want from a podcast.

4 Audiences and Content

In this chapter, I cover two topics: The audiences of podcasting and the content market in the four countries investigated.

The podcast audience is generally younger than traditional radio audience. The Reuters Institute´s Digital News Report (2019) states that for podcast users, the ease of use is the core appeal of podcasting. Listeners also appreciate the authentic voices and control of choice that podcasts offer. Podcasts are mostly accessed by smartphones. Younger audiences of podcasts are more likely to listen to them when they are out and about, while older groups often consume podcasts in bed, walking the dog or doing chores at home.

I was interested to find out what the companies interviewed know about their digital and podcast audiences, and how they define their target podcast audiences. While doing my interviews, I quickly ran into the same problem I already knew existed in audio audience research in general: podcast audiences are not yet well researched, and no one in the business of podcasting wants to reveal their metrics and audience data. I will cover the question of metrics in more depth in

chapter 5. Also, in addition of not wanting to make their private data public, some companies honestly say that "podcasting is still such a black box in terms of analytics around demographics", which is also true to most companies in the podcast industry. Everyone interviewed for this paper acknowledged this problem. Thus, in this chapter I cannot reveal any numbers on audience sizes, nor can I make any comparison between companies. Instead, I will present a more holistic approach to thinking about audiences and content creation in both broadcaster and newspaper newsrooms.

4.1 Broadcasters: "We are not doing mass media any more"

The broadcasters all find their podcast audiences to be younger than their traditional broadcast audiences. For instance, ABC in Australia says their podcast audience skews much more to people in their 30s to 40s, whereas the radio audience is in their 50s and 60s. Bayerischer Rundfunk in Germany finds their Spotify audience to be 75% under 35s, and over half of that audience is female.

The BBC, especially, is taking its quest for young audiences very seriously. According to my interviews, the BBC is the only company who conducted research on the under 35s audience to investigate preferences and listening habits. The research resulted in a framework to serve the target audience (20- to 35-year-olds) better. The BBC specified four needs that on-demand content needs to fulfil: social connection, mood management, learning and discovery, and independence.
[19] The needs reflect an enormous shift in the way the younger audiences make sense of media content, which is partly driven by the external services reframing their world.

In general, podcast audiences are seen as highly engaged and more active than traditional broadcast audiences, but accordingly, the ways in which they need to be approached are different. At the ABC, the news division created a successful daily news explainer called *The Signal* for

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[19] https://www.bbc.co.uk/programmes/articles/403C7htQdBtQ9nQZXs2MJfY/bbc-sounds-audience-needs

people in their 20s and 30s, i.e. those who will not turn on the news bulletin on TV at night, but choose to consume their news on their mobile phone or through their social media feeds.

Broadcasters face a dual challenge: On the one hand, they must find podcast content that appeals to a bigger audience, on the other hand, they must accept that the age of broadcasting to mass audiences just might be over in the digital world.

> *"A company like ours has to learn that we're doing not mass media anymore in the audio context but having especially audio products for several target groups. The people who are listening to for example the Tagesticket [daily news show] are not listening to all of our other podcast products."*
> *(Philipp Grammes, Digital Chief , Bayern 2, BR)*

4.2 Newspapers: "A young, urban, educated, and progressive digital native"

At the Guardian, the joke is that the Guardian podcast audience is like "a hyper version of a Guardian reader": a young, urban, educated, and progressive digital native. This is true for all newspapers interviewed for this research paper. The podcast audiences are significantly younger than the readers.

For example, the Guardian mentions an age gap of 15–20 years between the podcast listener and newspaper reader. At Dagens Nyheter in Sweden, the average podcast listener is around 35 to 40 years old and female, whereas the daily paper is read by a 67-year-old male reader.

The main difference between broadcasters and newspapers is the focus of podcasting. Whereas the broadcasters are focused on reaching (new) young audiences, the newspapers see podcasts as a way of serving their existing audiences with new and more varied content.

"It is more a question of in which format they should consume the journalism", says Martin Jönsson, the Head of Digital for Dagens Nyheter. At Dagens Nyheter, the staff knows their audiences are interested in quality reporting of politics or foreign news, so their podcasts aim to deepen or broaden these themes.

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In Australia, the Australian´s core traditional audience is a older, conservative audience. However, with recent popular true crime shows such as *the Teacher´s Pet* and *Who the Hell is Hamish*, the newspaper has been able to reach a very large, international audience.

> *"I think we're not we're not really just looking to engage our own readers; it's about trying to place our masthead amongst the kind of people who are doing this well in Australia and internationally."*
>
> *(Eric George, Multimedia Editor, the Australian)*

A recurring theme for podcasting at newspapers is also the loyalty of the listener, as well as the relationship between a show's hosts and the audience. The audience has a more emotional relationship to the podcast shows than to other products. At Die Zeit, the staff have noticed how the comments section of podcasts maintains much higher quality than the comments sections of online articles. "I think they feel attached to us in a different way", says Mounia Meiborg, responsible podcast editor of Die Zeit Online. She also says that emails to the podcast hosts are written in an informal and personal way, very different from comments made on an article. As a result of this intimate relationship, Die Zeit is now planning to work even more with the engaged audiences, e.g. through organising events or gatherings around their podcasts.

Through their intimate relationships between the host and the listener, podcasts seem to be able to build trust to a larger extent than other types of content produced by mass media outlets.

> *It's about having a quality relationship with your audience as well and I think an engaged 20 to 30 minutes or an hour on some of our podcasts multiple times a week is a really exciting amount of time to be able to spend with someone.*
>
> *(Christian Bennett, Global Head of Video and Audio, the Guardian)*

4.3 Podcast content

In a podcasting industry newsletter, a podcast creator shared her favourite podcast series. Her favourite shows included podcasts with subjects varying from Canadian history to agriculture,

Jewish demonology, wine, art history, wine, and breakfast foods. This is very telling — if you can think of a subject, there probably is a podcast out there about it.

Still, according to an Edison Research survey[20], 59% of Americans who do not listen to podcasts say podcasts do not provide anything that they cannot find anywhere else.

4.3.1 What kind of content works well in podcasts?

The Reuters Institute´s Digital News Report (2019) lists reasons for listening to podcasts. The main reasons for listening are to keep up to date about topics of personal interest (46%) and to learn something new (39%). Other motivations include to fill empty time (25%) and as a change from music (22%). The reasons for listening differ across age groups: Young listeners look for podcasts that entertain them or fill empty time, whereas older listeners are more interested in keeping updated. How do companies respond to these needs?

To answer this question, I picked some recurring themes from the interviews, where companies were asked to describe successful podcast content created by them in the last few years. Although the diversity of successful podcasts is increasing, these three formats occurred in many of the answers.

News explainers

All eight broadcasters and newspapers interviewed for this study produce a "news explainer" show. The explainers are focused on daily news and try to explain some of it in depth. The length is often around 20 to 30 minutes, timed for the daily commute.

The Guardian´s Christian Bennett thinks their daily news explainer show, *Today in Focus*, works particularly well for a younger audience because the aim of the podcast content is to make shows that can be enjoyed even if you have never heard of a certain subject. "We have a generation that feels really excluded: they feel they don´t understand the news", he says.

True crime

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[20] https://medium.com/s/story/podcastings-next-frontier-a-manifesto-for-growth-7e8b88d32fde

True crime is probably the most popular format for podcasts, and this was reflected in the interviews. True crime podcasts are often engaging and consumed in "binge mode" as the mystery unveils itself. Some companies say they have also been an excellent way to attract a more female listenership.

At Die Zeit, one of their most popular podcasts is a crime podcast where a crime reporter goes through old cases. "She is also a very strong personality, a grande dame with a big aura and very specific in a way, and I think it (the success) is the combination for this podcast", says Mounia Meiborg from Die Zeit.

Timeless and subject-based shows

These are mostly timeless pieces; things that the listener can listen to at any given time with the content remaining fresh. This format often has a more or less niche theme or topic, such as BBC Radio 5:s *That Peter Crouch Podcast*, which is basically a conversation between a sports journalist and a footballer talking about football life.

Another example is the Swedish *P3 Dokumentär*, a hugely popular show that goes deep into current history, explaining why and how things happened. The success of the show has also spawned other podcast series such as *P3 Dystopia*, which tells stories of worst case scenarios. "*P3 Dokumentär* has a 10 -year long catalog of content. You can go back and listen to documentaries made some ten years ago and they are still relevant", says Simon Gooch, Head of Insights & Industry Relations at Swedish Radio.

4.3.2 Content analysis of popular podcasts on Apple podcasts

How do podcast markets in these four countries divide up the most popular podcast genres, and who makes the most popular content at the moment?

To dive further into the current podcast markets in each country, I looked into Apple Podcasts "top podcasts" lists provided by Chartable.com. [21]

Unfortunately, no websites provide flawless podcast charts or data about podcasts. In the case of Apple Podcasts, it has been argued that the Apple algorithm favours new shows, and therefore

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[21] https://chartable.com/charts/itunes

does not give a very clear picture of what is actually consumed in reality. As *the Verge*[22] notes, podcasts don´t have a major public facing popularity metric apart from these charts. These charts are also a way for media outlets to evaluate their competition. Even if Apple is not very transparent about the creation of its charts, they still remain important for the podcast industry .

However, as I could not find any other way to compare four different countries from the same source, I decided to use Apple Podcasts´ "top podcasts" ranking , which at least gives a rough picture of the most popular shows at any given moment. With this information it is possible to form some idea of the most popular types of content and the publishers of popular shows in each of the four countries.

I collected data on two separate days (March 23rd and May 14th 2019) on the 50 most popular podcasts in the UK, Germany, Australia and Sweden. I ended up with data on the 100 most popular podcasts from each country. I annotated the podcast lists using two criteria: the main content category of the podcast and the publisher of the show. It is mandatory to include a main category when uploading content to Apple Podcasts, in order for the shows to be listed and searched for in these categories.

If the publisher of a show (e.g. BBC, the New York Times, Cadence13) was not clearly indicated in the show description or show image, I searched for it online. In cases of no publishing company, I marked the show as "independent".

I was also interested to see whether true crime — arguably the most popular type of podcast — still interests audiences in the countries investigated, and whether there a visible difference among the countries in the popularity of true crime. Therefore I counted the number of true crime shows as well.

Full details of the analysis are provided in Appendix 2. All charts of the four individual countries are also provided in the Appendix.

The United Kingdom

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[22] https://www.theverge.com/2018/11/29/18097381/apple-podcast-charts-click-farm-advertiser-revenue

In the UK, the most popular podcast genre was comedy (27%) followed by society and culture (26%), followed by shows in News and Politics (11%) and Arts (10%). The Sports category was in 5th place (8%).

Compared to the three other podcast markets, comedy and sports shows did particularly well in the UK market. These included podcasts such as BBC´s *That Peter Crouch Podcast* (sports) and an independent podcast, *the Guilty Feminist* (comedy). The UK chart was also the only one that featured a music podcast among the 100 most popular podcasts: BBC´s *Desert Island Discs.* Nearly half of the shows were published by independent creators (49%), with public radio podcasts in second place with an 18% share and podcast companies in 3rd place (12%). Shows published by newspapers or magazines made up 6% of the total. Of all the 100 podcasts, 13 true crime shows were identified.

Sweden

In the Swedish podcast market, the most popular category for podcasts was society and culture (30%). This includes shows like *Mordpodden* (a murder podcast) by Bauer Media´s Radioplay or *Paradise Hotel-podden* (a show about the tv show, *Paradise Hotel*) by the commercial radio company Ilikeradio. The comedy (23%) and news and politics (16%) categories also topped the chart. In the Swedish market, podcasts made by two bloggers or tv personalities (eg. *Brita&Parisa* by Elle) are remarkably more popular than in the other podcast markets in Germany, Australia or the UK. True crime is also quite popular in the Swedish market: 14 of the 100 shows were true crime. As Sweden is one of the most advanced countries in podcasting, it is no surprise that 27% of the shows were published by independent creators and 26% by podcast companies. 13% of the shows were published by public radio and 5% by newspapers or magazines.

Australia

The most popular category in the Australian market is society and culture, with a whopping 44% of the top shows belonging to that category. Society and culture shows include ABC Audio Studio´s *the Pineapple Project,* a show about work life, or *The Teacher´s Pet*, the Australian´s true crime series. 16% of the podcasts were in the news and politics category and 10% of the shows were comedy shows. The most remarkable thing about the content on Australian top charts is the number of true crime shows: 30 out of 100 shows were true crime.

Independent creators (33%) and podcast companies (31%) are the biggest publisher groups on the market, with public radio in third place (12%).

Germany

The German market is led by podcasts in society and culture (24%). Business (22%) comes in second and comedy and health in a shared 3rd place (14% each). These podcasts include titles like *Woher weisst Du das,* a podcast featuring interesting explanations of the world by Die Zeit, a health oriented independent show called *Happy, holy and confident*, and *Gemischtes Hack*, an independent comedy show.

In the German top charts there are many business shows: 22% of the shows are in the business category. On the other side, the true crime trend does not attract the German audience as much as in the other three markets: only five out of 100 shows were true crime.

55% of the German shows were made by independent creators, with public radio and newspapers/magazines both taking an 8% share. Podcast companies produced 7% of the top 100 podcasts.

4.4 Conclusion

For the four broadcast companies interviewed for this paper, podcasts represent a new and perhaps even an innovative way of getting out of traditional, linear radio. Broadcasters seek to attract a younger audience with podcasts, and admit that the audience is very different from their existing one. Their main challenges revolve around building an attractive library of on demand-only shows, maintaining a balance between their "old" and "new" audiences in broadcast and digital, and teaching their audiences to actually find and consume podcasts.

For newspapers, new, younger audiences are also important, but they were less emphasised in the interviews. To the four newspapers, "strengthening the brand" or "finding the voice" is more important than a younger audience. Podcasts are seen as more of a tool in the toolbox than a replacement of something old. Nevertheless, as a brand extension podcasts can be very important and help newspapers to stand out from the crowd.

These differences are due to the very different traditions of broadcasters and newspaper companies – mainly because the former already possesses the narrative skills of audio, whereas the latter needs to learn them.

This comes down to finding skilled workforce. The Guardian especially mentioned that "everyone has been trained at the BBC", whereas people working in broadcasting felt the need to re-educate their workforce to better understand the podcast form.

There are high hopes for podcasts to finally go mainstream. content of podcasts need to be more mainstream too. In a *Pacific Content* [23]article about podcasting trends in 2019, several industry leaders voice a need for more mainstream formats such as reality and game shows as well as mainstream host talent. These aspirations seem not to have become true yet.

In the small analysis I conducted, it seems that podcast markets are quite well established in all four countries. All four markets have legacy media and a very significant number of independent creators producing podcast content.

In terms of the content published, all markets are very well served in terms of news and entertainment. Interestingly, the top 100 charts in each country were mainly filled with national content: only a few big time international hit shows like *The Joe Rogan Experience* or *The Dropout* were able to make it to two or more charts. This is true also of the English-speaking countries, as American content did not dominate the charts.

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[23] https://blog.pacific-content.com/13-predictions-for-podcasting-in-2019-d52e7ed536ed

The one big thing still missing entirely from the podcast charts is music. This is due to copyright laws. As Tom Webster predicts [24], having music in podcasts would change the podcasting scene in a massive way.

5 Internal and external problems with podcasting

What kind of internal and external problems are involved in doing podcasts?
In this chapter, I will identify the main internal and external problems identified by the broadcasters and newspapers I interviewed. I will conclude with some notes on the measuring problem of podcasting and some suggestions for a successful start in podcasting.

5.1 Broadcasters

Internal problems: Journalists are still living in the radio age

Many broadcasters say that the hardest thing in moving towards podcasting is trying to get the workforce to understand the differences between linear radio and podcasting — when the differences matter. The companies employ a lot of talented radio professionals (journalists, editors and presenters) whose relationship to the audience has to change when moving to podcasts. "Until now, we had to be interesting for everyone out there, and this is something we have to change. What we do with podcasts is not for everyone out there, it is just for one kind of people", says Philipp Grammes of Bayerischer Rundfunk.

This shift in thinking is a large one for broadcasters, who have in the past tried to reach as wide an audience as possible. What does it mean to narrow the audience reach to maybe only some thousands of people? Some of the interviewees mention that creating a podcast team inside a broadcasting house is seen as a disruptive force. Kellie Riordan from ABC says that for young audiences, radio equals the mobile phone in their hands. It is necessary to understand how this

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[24] https://medium.com/s/story/podcastings-next-frontier-a-manifesto-for-growth-7e8b88d32fde

fact will change the audio business, in the same way that the internet and digital have disrupted print media.

"We've got to have an in-house team that is disrupting the traditional radio model. That's everything from work flows through to the creation of content through to being innovative on the way we deliver it, because if we didn't do that, we were just kind of going to be irrelevant in 20 or 30 years' time", Riordan says.

Internal problem: Too many ideas, too little time and money

Broadcasters also struggle when people inside the company have too many ideas. All the companies interviewed are worried that a limited capacity to produce new things leads to saying no to people, even when the ideas are good. As mostly state-funded companies, "a finite bucket of money" means it is impossible to invest in new things while still keeping everything old, unless funding is increased.

Juggling the need to move towards a new way of generating content and the need to fill the holes in the radio schedule is demanding. Broadcasters have also tried to fit some of the podcast content back into the radio schedule. "That can work really well in some instances and it also helps to change and freshen the sound of a radio schedule", says Kellie Riordan from ABC.

Some broadcasters also highlight the need to not focus completely on the attraction of podcasting. Swedish Radio´s Simon Gooch points out that radio remains an important medium particularly around "drive time" in the morning and in the evening. "The live experience is important. We must not forget how many people we reach there (on live radio) and instead end up spending almost too much time focusing on demand", Gooch says.

Internal problem: Everything moves slowly

Working in a big taxpayer-funded broadcasting organisation is sometimes incredibly bureaucratic. This means that things inside the companies happen slowly. For the development of podcasting in broadcasting companies, this has meant a slow route for mobilising money and resources that are traditionally tied to traditional linear radio networks.

"We´ve come a little way, but still compared to a start up like Gimlet or even a company like Acast, or Spotify or Pandora or anyone else that is getting into the podcast space, we move slowly. And when you see opportunities in the market you want to jump quickly", says Kellie Riordan from ABC.

External problem: Marketing and distributing podcasts is hard

With a broadcaster's long history of linear, traditional radio, marketing new audio products as well as a new way of consuming them is difficult. Broadcasters have the responsibility to explain to everyone how to use their products, and sometimes, the podcast platforms are confusing. "People who are our audience and have not listened to podcasts before — we need to explain it to them. We need to explain where our podcasts are, how to get to use them, what do you need for that, what kind of apps, what kind of channels are out there", describes BR´s Philipp Grammes. At the BBC, a big challenge is the distribution of podcasts. The company launched their own audio platform *BBC Sounds* in 2018, and is now trying to grow the platform while simultaneously existing on other big podcast platforms. In March 2019, BBC withdrew its podcast content from all Google services. According to the BBC[25], the reason for this is Google directing users who search for BBC content into its own podcast service, rather than BBC Sounds or other third party services. BBC sees this as reducing people´s choice.

Broadcasters also struggle to find marketing resources to promote their content.

Marketing money is still largely tied up in linear schedules, which makes it hard to find extra money for marketing campaigns around podcasts, especially when podcasting is scaling up quickly. In an extremely competitive podcast market, the slowness of broadcasters hinders them.

> *"So now that podcasting has become sexy you know the fight is on to stitch up you know someone's idea and get it contracted before they go somewhere else. And again that's where we often move more slowly. "*
>
> **(Kellie Riordan, Manager, ABC Audio Studios)**

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[25] https://www.bbc.co.uk/blogs/aboutthebbc/entries/d68712d7-bd24-440f-94a0-1c6a4cdee71a

5.2 Newspapers

Internal problems: People are new to audio

For logical reasons, newspapers mostly employ people who can write for a living. Podcasting means learning a new skill, which is not always easy.

"Most of us aren´t trained to speak in front of a microphone, or not really trained. Some have worked a little bit in radio, or interned at a radio station", describes Mounia Meiborg from Die Zeit, but continues that

she also sees the inexperience as a strength, not only as problem.

"I think it also gives us some kind of credibility. It sounds a bit weird, but I think it makes it more diverse. I think people feel more related when there's not this super trained voice talking to you in a neutral tone like in a professional news radio show", Meiborg adds.

Internal problems: It is hard to make good quality content

It might also come as a surprise to some that podcast is a very labour intensive medium, and the old tricks of radio shows does not always work in podcasts.

At Dagens Nyheter, many of the people working with podcasts actually have radio experience and enthusiasm for the medium, but Martin Jönsson has still seen the difficulties of producing a great show. "It´s when you start asking the difficult questions of why and who, what´s the idea, what´s the format. Then it starts getting more difficult to get people to understand the challenges of the format because they realise it might not be as easy as they thought it would be", he says.

Producing a labour-intensive, somewhat costly podcast is also a risk for the newspaper.
The Australian´s Eric George is well aware of this. "Every time I go to the paper and ask them to do something like *Who the Hell is Hamish* we are looking at a substantial investment of time with no real guarantee of an audience", George explains. The success of previous podcast projects does give them a little bit of a launching pad, but the risk to fail with a podcast project is considerable. Audience retention is also harder compared to newspapers, as there is no existing

audience for audio. "As a newspaper I suppose our core product is still print stories, so there´s no real guaranteed audience for us that we can create through the channels that we control", George says.

External problems: Discoverability and marketing

How do you launch a new show into a very crowded marketplace? The discoverability of podcasts is a key external problem for everyone in the market, but even more so for companies with no background in audio publishing. It is important to build networks and have connections with the big publishing platforms. This is linked to the other challenge newspapers have related to audio consuming: Building listening habits, as audio consumption is generally very habit oriented. People listen to podcasts every day for the same 20 minutes on their way to work, and to get them to habitually choose and stay with one product takes time and skill.

"If they don´t like it immediately they will never try it again. When people start to listen to podcasts often up to 20 to 40 percent stop listening within the first minute because they don´t like the topic, it´s too slow, whatever it might be. So, it´s very hard to get people to onboard a new podcast", says Martin Jönsson from Dagens Nyheter.

In the end, many think that even the discoverability problem boils down to quality and finding an authentic voice for the audio medium. At the Guardian, coming from a print background means you have to be confident with what you do, says Christian Bennett: "You´ve got to be true to making something quality that you believe in rather than just following the market, where you just copy what everyone else is doing."

5.3 The Measuring Problem

The biggest problem there is to podcasting in 2019 is how to measure the success of your content. The quality of data varies wildly across the publishing platforms, and this has led to a situation where almost no one wants to share their listening figures in public.

The podcasting newsletter and website Podnews [26]has published a guide for understanding podcast metrics better.   According to Podnews, appearance on Apple Podcast charts reflects a podcast´s ability to attract a larger number of new subscriptions to their podcast over recent days, not downloads. Other Apple charts, like *New and Noteworthy,* are believed to be editorially driven. Another big platform, Spotify, uses **listens** as a way to measure podcasts. This divides into two categories, **starts** and **streams**. Starts measure any listener who clicked on a podcast episode and is thus comparable to a **download,** a measure used by other podcast platforms and described below. Streams, on the other hand, measure any listener who listened to at least 60 seconds of the podcast.

And to make matters even more confusing, all podcasts hosts measure downloads differently, and of course, "**downloads**" are different from "**plays**". A download means quite literally that someone has downloaded a piece of content on their device, whereas a play normally means actual listening.

 Thus, even a very shallow introduction to the world of podcast metrics makes it evident that measuring podcasts is a complicated business.

No one has solved this problem perfectly. However, the Swedish have come up with a unique model that works across the market. A tool called Poddindex[27] is a collaboration among Swedish Radio, two commercial radio networks, and podcast company Acast. Poddindex works in Sweden to create legitimacy for podcasting and as an industry measurement standard. In November 2017, Poddindex published its first ratings. The data presented on their web page is simple: How many people a show reaches in a week, and how many listens the shows have.

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[26] https://podnews.net/article/understanding-podcast-statistics

[27] https://www.poddindex.se/

A public display of the weekly ratings helps all companies to create a better understanding of the market. At Swedish Radio, Poddindex has had internal impacts as well. "It has helped us to understand what the definition of a successful podcast is. And that the definition for us isn't necessarily the same for a minority language editorial team than for a large big budget podcast documentary produced by one of our main stations. We have to have different criteria for success, but at least we can now measure things and get an idea of what is actually working and who is listening", says Simon Gooch.

#	Leverantör	Podcast	Räckvidd/v	% Förändring	Lyssningar/v	% Förändring
1	sveriges radio	P3 Dokumentär	▲ 378 563	56 %	▲ 1 008 318	35 %
2	acast	Alice & Bianca - Har du sagt A får du säga B	▲ 178 585	3 %	▲ 415 456	8 %
3	acast	Mellan Himmel och Jord	▲ 143 965	11 %	▲ 380 863	10 %
4	BAUER MEDIA GROUP	Framgångspodden	▲ 131 061	2 %	▲ 619 516	7 %
5	acast	En Mörk Historia	▲ 101 376	54 %	▲ 245 792	80 %
6	BAUER MEDIA GROUP	Svenska Mordhistorier	▲ 99 313	16 %	▲ 324 109	19 %
7	podspace	Filip & Fredrik podcast	▼ 97 128	-2 %	▼ 216 652	-3 %
8	sveriges radio	P1 Dokumentär	▼ 95 470	-12 %	▼ 222 775	-22 %
9	acast	Wahlgren & Wistam	▼ 86 712	-3 %	▼ 239 532	-3 %

Source: Poddindex.se

5.4 Takeaway: Three tips for a successful start

Be aware about what´s going on around you. Where is your audience? Find it and start publishing meaningful content in an easy to use format.

We should have noticed earlier that smartphones are a good publishing instrument for our on-demand audio. So when smartphones came up we had published apps for linear radio, not for on demand audio. We should have done that a bit earlier. (Philipp Grammes, BR)

Do not judge success or lack of success too quickly. Audience growth is usually quite slow in audio, unless you publish a hit crime show in a big market. Be confident with your content and follow the data from week to week.

We're talking about a medium that is asking people to invest their time quite intensively and build a relationship with a host that you come back to time and time again - that takes time. That's like any relationship to build. And I think people pull podcasts down too quickly. (Katharine Godfrey, the Guardian)

But do not overinvest in podcasting either. It still is quite difficult to make money with podcasting, and everyone is guessing what the next couple of years will look like for the actual business models. A warning example comes from the Guardian, where overinvesting in podcasting at the very start, before there was any sort of financial model, meant having to pare back and reinvest again.

"I think a lot of organisations are just blindly throwing money out because that's what we do in these situations when something is fashionable. To a certain extent, it is OK to be conservative", says the Guardian´s Christian Bennett. He also thinks there is "going to be a gold rush" in the next years, with the audience getting overserved with too much content.

5.5 Conclusions

As all the interviews and examples from the companies interviewed show, producing, marketing and distributing podcasts requires time and effort, especially when there is not much money to use.

Additionally, companies struggle with educating their employees and audiences to better understand the special characteristics of podcasts.

The industry needs an easy and understandable way to measure success. Metrics and data that work are an absolute requirement for the podcasting industry to proceed to the next level of business.

There is also fear that at some point the "gold rush" will overpopulate the podcast market in such a way that the audience actually gets overserved in some markets.

In the next chapter, we will see if the podcast markets actually already appear overflowingly full in some countries, and also look into the future plans of the eight companies investigated.

6 Success and Future

In this chapter, I discuss two themes: What does success in podcasting mean to the eight companies investigated, and how do the companies see the podcasting market evolving in their countries?

As a conclusion, I offer three trends worth following in audio and podcast development.

6.1 Success in podcasting

What does success look like for the companies I interviewed?

When asked about successful products, most of the companies did not mention audience sizes or numbers or ad revenues. Instead, they wanted to talk about concepts such as "high quality" or "understanding the medium". Listening figures and other metrics were mostly mentioned as a part of creating successful podcasts — they do not represent the entire success. My guess is that this result would be very different if the companies interviewed had been from the more strictly commercial side of the media business, where creating big audiences to attract advertisers is seen as more important.

As podcasts are not making a lot of money (yet), they are mostly considered quality products, as Dagens Nyheter´s Martin Jönsson emphasises. "We have to feel that this is of high quality, something we can be proud of. Quality is successful because this is a new format for us and it is difficult do it well." He also adds that Dagens Nyheter is not, at this stage, using podcasting to seriously grow the audience or make money, but rather, podcasts represent a slow building progress for distinctive, high-quality journalism in different channels. He predicts that in the coming years, when voice and smart speakers become more important means of technology, it will be vital for newspapers like Dagens Nyheter to have a mix of content and channels that work

"better than being an old print newspaper that also became digital".

The Guardian measures success at least partly in terms of financial gain and audience reach, but stressed that this has to be combined with a relationship with the audience that still "feels like the Guardian".

The companies also see success in terms of internal change. For the German broadcaster Bayerischer Rundfunk´s Philipp Grammes, internal success means that "classical radio journalists" start to see podcasts as an interesting medium and discover the possibilities of podcasts. This internal change benefits the whole organisation.

The companies do not, however, only define success in non-measurable terms. At Swedish Radio, both ways of measuring success are present.

"I would argue I can absolutely see where are people coming from when they say content is the only way to find success. At the same time, if you look at a good piece of content and say, hang on a minute, after a minute and 23 seconds 50 percent of the listeners have stopped listening. Why? How can we stop that from happening?", asks Simon Gooch.

Gooch also points out that especially for a public radio company, looking at the data more closely reveals different kinds of successes. At SR, a small, minority language podcast that reaches 500 people but that keeps most of its listeners all the way through is deemed a more successful product than a podcast with 100 000 listeners that maintains only 14% of its audience at the end of the episode.

Evaluating success and growth can be used to make plans for the future. Therefore, I was also interested to know how far ahead companies plan their actions, and how they see their future in the audio market.

Most companies say that planning too far ahead feels strange. "Say, five years is totally crazy because so much changes all the time", explains ABC´s Kellie Riordan.

Broadcasters seem to have longer-term plans than newspapers, mainly because audio development is tied to their core business. But even between broadcasters, the span of planning varies substantially. At ABC, the Audio Studios have a three year plan of overarching strategy, with concepts at different stages planned anywhere from six to 24 months ahead. In contrast,

Bayerischer Rundfunk says they have plans to publish two or three podcasts in the next couple of months, but "no idea what to do after that". This is because the company feels the market is changing fast around them. "I don´t want this to sound like a problem, because I think in the digital business you can´t plan for more than a year", says Philipp Grammes.

Newspapers generally report that they currently have plans for about a year ahead. Their most important focus is to continue building stable podcasts audiences. Podcasting is seen as part of everyday business, and understanding wh the next type of success might lie is considered important.

"Anyone that is like, stop everyone, pivot towards audio — that would be a ridiculous thing to do", says Christian Bennett from the Guardian. More important to newspapers is "lots of room for experimentation and figuring out what the right mix for us is", as the Australian´s Eric George puts it.

6.2 Podcast markets in four countries

Both of the UK companies still see the country as a small marketplace for podcasting. The role of BBC is seen as "fueling the industry", helping to make podcasting more mainstream. A growing commercial podcast sector is also seen as important, in addition to the public service one. In terms of content, there were calls for authentic voices and progression in the diversity of podcasting.

In Australia, the market is expected to become more competitive soon. At the moment, the ABC is a strong player in the field. Podcast hosts and producers with new ideas to pitch come to ABC first, because they think the weight of the ABC brand sets shows apart from others in the market. The "gold rush" around podcasts is expected to eventually stop, as people realise how much work they require. However, committed players will stay around, as there is no reason for people to suddenly stop consuming audio on demand.

Probably the most podcast-heavy country of the four countries interviewed is Sweden. The Swedish podcast audience have a lot to choose from on the national market, and moreover, the consumption is not limited to Swedish podcasts, as the audience consumes a lot of high quality international shows. This might lead the audience to become very selective on what they spend

their time on. "You listen to Michael Barbaro [of the Daily podcast], why should you take a crappy Swedish version of that?", asks Dagens Nyheter´s Martin Jönsson.

Both Swedish companies expect the industry to grow in the coming years, and see a lot of development in potentially paid for exclusive content across different platforms.

The German market is still evolving, even if an enormous number of podcasts already started around 2013. A lot of media outlets are publishing shows and entering the market. Both German companies interviewed feel the growth is "a little exaggerated", but still good for building the market and creating competition.

The German podcast market is still looking for its hit series — the German version of *Serial*. "Will there be podcasters that have a really broad audience, that doesn´t stay in the podcasting world but goes beyond it? We don´t have it yet, not even close", says Mounia Meiborg from Die Zeit.

6.3. Conclusion: 3 trends of audio development

Predicting what will happen in podcasting and the audio business is difficult, as things keep moving forward very quickly. However, there are three things that the podcasting industry has been discussing lately – and which were all mentioned in my interviews.

Membership models, ad-free, exclusivity

Will people pay for podcasts? A company called Luminary thinks so. It is both a podcast app, which anyone can use for free, and a network of exclusive shows, which will require a monthly fee and only be available through the app. The startup received 100 million dollars to try out its business model that launched in April 2019. The plan is to publish exclusive, ad-free content to monthly subscribers and attract users with a great product experience.

Merging things: Podcast, radio, music

Why have several apps if you can have just one? Broadcasters are building apps that offer music, podcasts and live radio all in the same app (BBC Sounds is a good example of this

line of thought). Also, Spotify´s major investments into podcasting means that the company is trying to gain dominion over not only music, but over audio in a broad sense.

Audio content offered more broadly

People want to listen to things, and thus, sales of audio books are also expected to grow. Because people are spending more time on listening, audio consumption might become more closely merged, which will allow companies new possibilities to package different stories into an audio format, whether they be news, documentaries, or books.

7 Conclusion and future research

In this research paper I tried to answer three research questions that I think are relevant for newspapers and broadcasters in the podcasting business right now. In this conclusion, I will briefly summarise the answers to these research questions, offer some advice for successful podcasting and share some thoughts about future research in audio and podcast media.

How are broadcasters and newspapers using podcasts in their media strategies? What are the challenges that emerge as they adopt a new medium, podcasts, in their practices?

Broadcasters and newspapers use podcasts slightly differently in their media strategies. In general, broadcasters see podcasts as a way of attracting young audiences; newspapers see them more as an extension of their existing brand.
In this paper, I identified both internal and external challenges to podcasting. Internal ones include educating the existing workforce to produce distinctive content, limited capacity to produce great ideas into content, and the labour intensity of making outstanding podcasting. Externally, the biggest challenges concern distribution, discoverability and marketing of podcasts.

What kind of content or formats are produced and what do media companies know about their podcast audiences?

In the four podcast markets studied, the most popular content categories in Apple Podcasts were shows in *Society and Culture*, *Comedy*, and *News and Politics* . All of the eight companies produce some type of "news explainer" show, which often is a popular product for media companies. True crime is still a popular format, especially in Australia, where 30 out of 100 most popular podcasts were true crime.

Media companies do have an idea of their podcast audiences, but most companies admit that the data is not very good. The podcast audience in general is younger (and more female) than the traditional broadcast or newspaper audience.

How are podcasts evaluated in media companies?

Success in podcasting was described by the interviewees in terms of a qualitative approach to evaluate quality and "finding your voice", and only to a lesser extent evaluated by data-driven approaches. Making people inside the company interested in a new way of storytelling was also deemed a measure of success. One reason for not placing much weight on measuring the numerical success of podcasts is the volatile quality of data across different platforms.

But what does it take to create a successful podcast and ensure it will not drain your resources but be a meaningful part of a digital media portfolio?

Through these interviews and talking to people in the digital media business, I thought of five factors that can contribute in creating successful podcasts.

1. **Create a team dedicated to podcasting**

   Find people who really feel a passion for podcasting. Reskill them and allow room for experiment and failure.

2. **Metrics that matter**

   Use metrics that matter for you. As we have seen throughout this paper, podcasting suffers from muddled metrics, so it is important to decide what matters to you. Think ahead about what matters to you the most – time spent on your platforms? Unique starts or users? Specify your goals and communicate them to your team.

3. **Be wise about your budget**

Podcasts might seem like a cheap form of content, as audio on a basic level does not require much more that a man and a mic. In reality, good quality podcasts are often labour-intensive and require more hands-on work than predicted. Think about ways to bind your podcasts together with other content across platforms. Do not look at podcasts as a separate project, or it will become an additional cost.

4. **Have a platform strategy**

    As they say, "digital is never your own". Consider building partnerships with audio publishing platforms and learn from other products.

5. **Think about a revenue model**

    Podcasting will have to find a sustainable revenue model in order to grow. Have a plan and work towards it.

While conducting this research, I thought a lot of the concept of "shiny new things" — is podcasting just a shiny new thing that gets added to an endless list of journalistic innovations? In her Journalism Innovation project report [28,] Reuters Institute´s Senior Research Fellow Julie Posetti sums up her main findings in this way: "Relentless, high-speed pursuit of technology-driven innovation could be almost as dangerous as stagnation. While 'random acts of innovation', organic experimentation, and willingness to embrace new technology remain valuable features of an innovation culture, there is evidence of an increasingly urgent requirement for the cultivation of sustainable innovation frameworks and clear, longer-term strategies within news organisations."

This also sums some of my thoughts about podcasting in media companies. There is a lot of enthusiasm involved in podcasting, and based on my interviews, everyone really enjoys the close relationship with audiences and the authentic style of making journalism that podcasting at its best represents.

But the list of problems is long for the whole audio and podcasting industry: No one has great, comparable data on their shows. Distribution and marketing of podcasts across all the possible

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[28] https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2018-11/Posetti_Towards_a_Sustainable_model_of_Journalism_FINAL.pdf

platforms requires time and money. Podcasting is, in fact, growing quite slowly in terms of audience growth (at least in the US)[29]. And with big players such as Spotify stepping up their game, will it mean the end for the free, independent culture that podcasting grew up in?

This paper did not concentrate on money. That is mainly because of the choice to interview ad-free broadcasting companies, and also because advertising in podcasts in the countries chosen is not yet as big as in the US, where we can see relevant growth in podcast ad revenue, estimated to hit 515 million dollars in 2019.[30]

Future research on podcasting should definitely include more on the topic of money and advertisement in podcasts, as they are essential to the growth of the audio industry. Also, more detailed research on metrics and podcast data is needed in the field to better understand the audience and growth of the business.

Appendix 1

List of interviewees

BBC	Ben Chapman	Head of Digital for Radio	live	January 2019
The Guardian	Christian Bennett	Global Head of Video and Audio	live	March 2019
The Guardian	Katherine Godfrey	Head of Audio	live	March 2019
Swedish Radio	Simon Gooch	Head of Insights and Industry Relations	Skype	April 2019
Dagens Nyheter	Martin Jönsson	Head of Editorial Development	Skype	February 2019
ABC	Kellie Riordan	Manager, ABC Audio Studios	Skype	February 2019

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[29] https://medium.com/s/story/podcastings-next-frontier-a-manifesto-for-growth-7e8b88d32fde

[30] https://a16z.com/2019/05/23/podcast-ecosystem-investing-2019/?utm_source=podnews.net&utm_medium=email&utm_campaign=podnews.net:2019-05-27

				February
The Australian	Eric George	Multimedia Editor	Skype	2019
Bayerischer Rundfunk	Philipp Grammes	Digital Chief, Bayern 2	Phone	March 2019
Die Zeit	Mounia Meiborg	Responsible Podcast Editor, Die Zeit Online	Phone	February 2019

Appendix 2

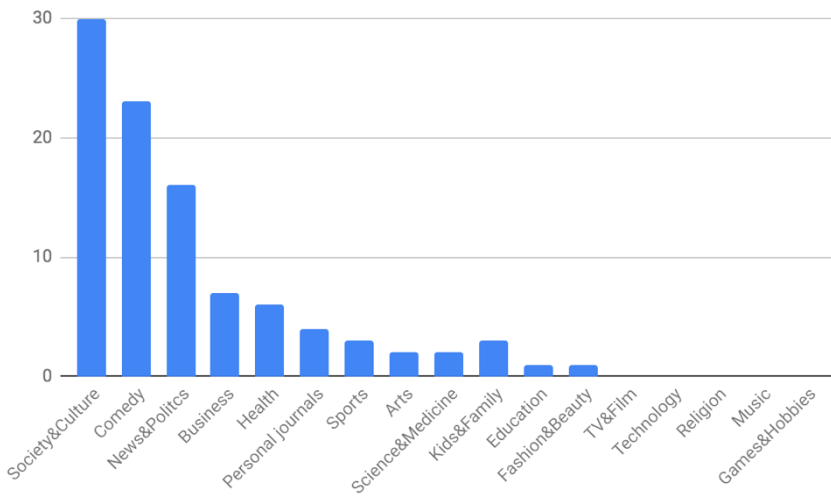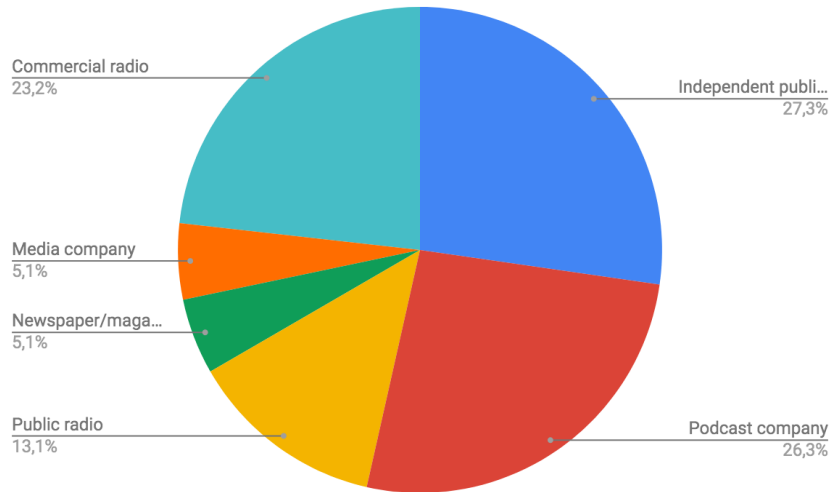Podcast category and production charts

All Apple podcast categories: Comedy, Society and Culture, News and Politics, Arts, Sports, Health, Business, Education, Kids and Family, Religion, Music, Games and Hobbies, Personal Journals, Fashion and Beauty, Science and Medicine, Technology and TV&Film.

Note: Society and culture is a broad category for podcasts. Unless a show is not clearly a "news and politics" or "comedy" show, many interviews, general information and themed shows as well as true crime are categorised as society and culture.
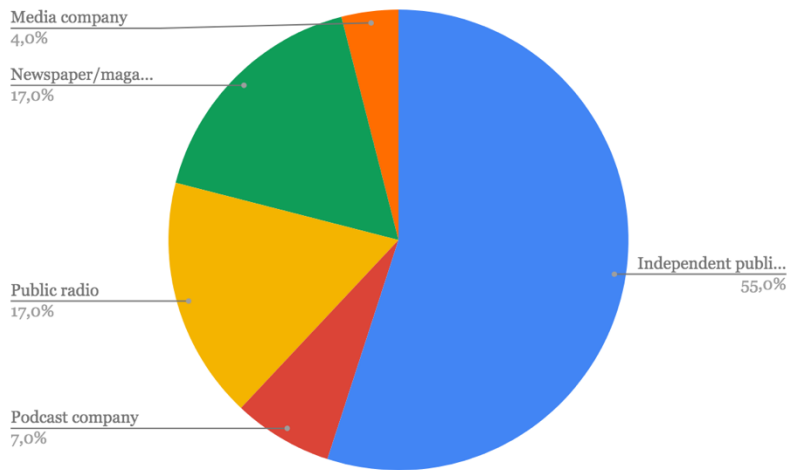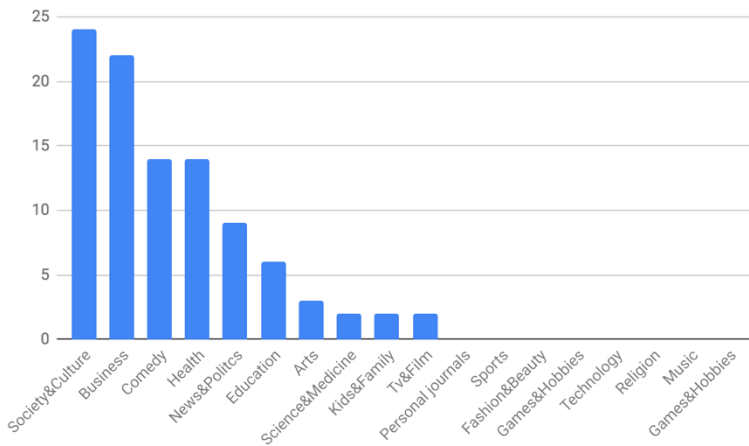
Publisher categories:

Independent publisher (no companies, individual people publishing their podcasts on platforms), public radio (eg. Sveriges Radio, BBC), podcast companies (eg. Wondery, Acast), newspapers/magazines (Die Zeit, the Australian), other media companies (Bonnier), commercial radio (SBS, ilikeradio) or governmental bodies or NGOs (NHS).
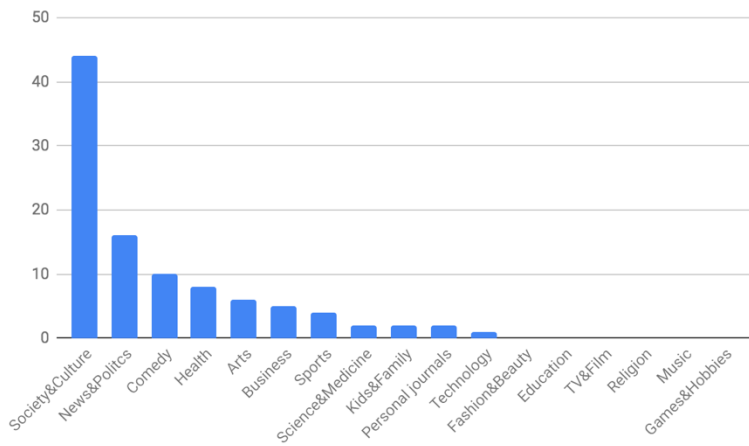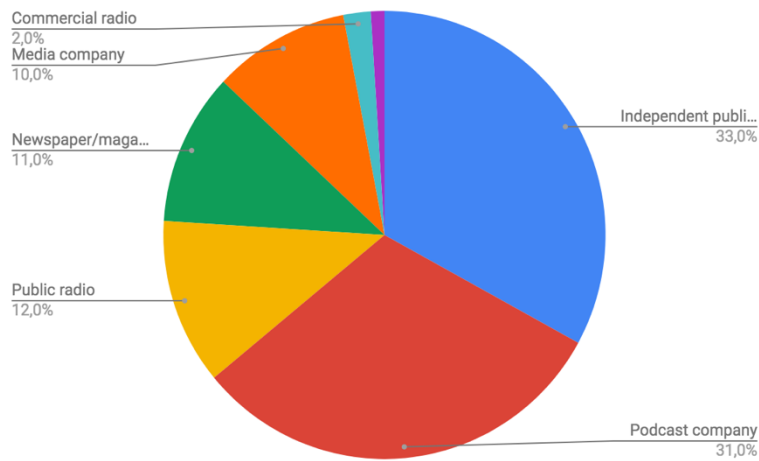
Sweden

Commercial radio
23,2%

Independent publi...
27,3%

Media company
5,1%

Newspaper/maga...
5,1%

Public radio
13,1%

Podcast company
26,3%

| Society&Culture | Comedy | News&Politcs | Business | Health | Personal journals | Sports | Arts | Science&Medicine | Kids&Family | Education | Fashion&Beauty | TV&Film | Technology | Religion | Music | Games&Hobbies |

Germany

Media company
4,0%

Newspaper/maga...
17,0%

Independent publi...
55,0%

Public radio
17,0%

Podcast company
7,0%

Australia

United Kingdom

Gov/NGO
3,0%
Newspaper/maga...
6,1%
Media company
11,1%
Podcast companies
12,1%
Public radio
18,2%
Independent publi...
49,5%

Categories: Comedy, Society&Culture, News&Politics, Arts, Sports, Health, Business, Education, Kids&Family, Religion, Music, Games&Hobbies, Personal journals, Fashion&Beauty, Science&Medicine, Technology, Tv&Film
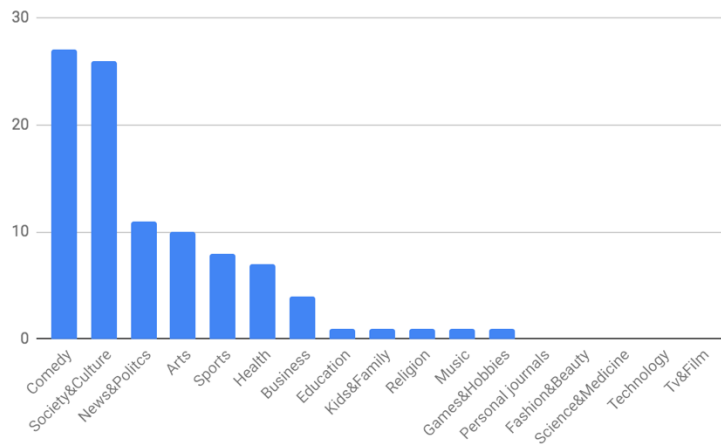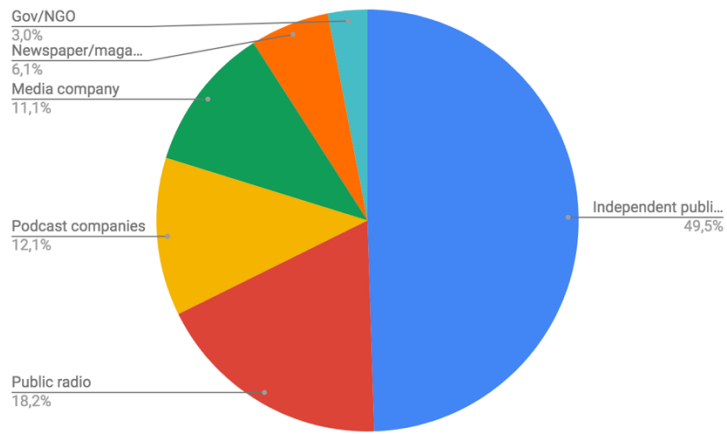
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