

# **Independent podcast networks in Spain: A grassroots cultural production facing cultural industry practices**

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## **Abstract**

This article analyses the main Spanish independent podcast networks. It is a two-phase qualitative study based on direct observation of the networks, a number of secondary sources and, especially, on semi-structured in-depth interviews with the coordinators or managers of these networks. From the political economy of cultural industries, the main objectives are to determine the motivation, perspective, and dynamics of these networks, as well as to explore their financial model. As podcasting implies cultural practices and meanings, we want to analyse whether independent podcast networks are basically a grassroots cultural production that maintain their amateur philosophy, or whether, in contrast, they are evolving towards an institutionalization that moves them closer to cultural industries and their practices, and the study of Spanish independent podcast networks is a useful starting point for putting mainstream and historical definitions to the test. This study sets forth how the progressive formalisation of podcast networks has generated tensions in the grassroots-industrialization balance. Spanish independent podcasters are pro-ams entering the production process of an industry in which other industrialized actors have already been established.

## **Introduction**

After some initial hyped expectations and the following cooldown, in recent years podcasting in Spain has gradually evolved towards a phase of maturity. According to the annual study of the AIMC (2020), the penetration of podcast listening in Spain reached 1% in 2018, 1.2% in 2019 and 1.5% in 2020, while that of radio in general reached 57.5%, 56.9% and 55.5% respectively. For its part, a study of selected countries by Statista (2020) places Spain in seventh position in terms of occasional podcast listeners (listening for 10

hours per week or less), behind Norway, Finland, United States, United Kingdom, Ireland and Denmark; in terms of frequent listeners (listening for 11 hours per week or more), after Norway (5%) and the United States, the United Kingdom and Ireland (with 3% each), Spain, with 2%, ranks equal with Denmark, Switzerland, Germany, Turkey, France and Russia. While audience data show the still limited reach of podcasting, the range of available podcasts in Spain has progressively increased due to several factors:

- Independent podcasting has grown and has built and strengthened a community (García-Marín and Aparici, 2018).
- Podcasting has become established within the radio industry not only as a distribution tool (Gallego, 2012; Sellas, 2012), but also as a means of production of digital native content (Bonet and Sellas, 2019; Ribes-Guàrdia et al., 2019; Pérez-Alaejos et al., 2018).
- Podium Podcast, the first digital native podcast network within the radio industry, was launched by Grupo PRISA in 2016. The same group recently reorganized its structure to unify its audio production strategies for its different media (PRISA, 2021).
- Media platforms other than radio (digital magazines and newspapers) produce podcasts (Leoz-Aizpuru and Pedrero-Esteban, 2022; Martínez-Costa and Lus-Gárate, 2019).
- Some large audio-visual producers have entered the podcasting sphere, producing award-winning podcasts.
- Podcasting has been used to recover and develop several radio genres (Sellas and Gutiérrez, 2022; Kischinhevsky, 2018; Legorburu et al., 2021; Rodero et al., 2019; Rodríguez-Pallares, 2017).
- Development of corporate podcasting and branded podcasts, as well as podcasting in education.
- During lockdown, two powerful podcast companies were established in Spain. In June 2020, Podimo arrived in Spain. This payment service, which emerged a year earlier in Denmark, is defined on its website as an “audio entertainment platform”. In October of the same year, Amazon’s Audible was launched in the Spanish podcast market.
- All these events occurred in the context of the consolidation and external growth of Spotify (Gimlet Media, Anchor, Megaphone), which launched, for example, the Radar Spain program in March 2020 and its first exclusive Spanish podcast in May 2020.

In its origins, podcasting emerged as a delivery system designed by and for amateurs with the desire to share content. However, more than two decades later, it has become established as more than a distribution technology. One symptom of the transformation

of the podcasting landscape in Spain is the evolution of the country's independent podcast networks. Thus, although podcast listenership is still relatively small, the recent growth in Spanish podcasting suggests that podcast networks are nevertheless an important site for studying how this audio production culture is evolving.

This paper presents the results of a two-phase study of Spanish independent podcast networks within the context of the evolution of podcasting in this country. Our main objective is to analyse the structure, production dynamics and financial model of these networks, based on two research questions:

- How do they define themselves?
- Are these networks a grassroots cultural production or are they moving towards the practices of a cultural industry?

The present investigation is a semi-longitudinal study on independent Spanish podcast networks. The first version of the study was conducted in 2019. During and after lockdown, when podcasts showed their full potential, we wanted to establish whether these independent networks and their representatives continued to think the same about their independence and their role in a more competitive environment dominated by the so-called podcasting platforms. To accomplish this, a second phase was developed in 2021. Thus, our analysis aims to go beyond a mere snapshot and reflect how both the concept and the workings of independent podcast networks have evolved over a crucial period in the history of podcasting in Spain.

### **Theoretical framework**

The theoretical framework of the analysis presented herein is the political economy of cultural industries, first illustrated by French, British, Spanish, Italian and even Quebecois scholars (Bonet, 2017), although just one of the non-British scholars – Bernard Miège, the only one whose ideas have been translated into English – has had some influence in the Anglo-Saxon academic field. According to Miège (1989) there are basically three commodification models: the publishing model, flow logic, and the logic of the written press (which moves between edition and flow production). Precisely, part of this theoretical framework has already been used by Heeremans (2018) to study US-based podcast networks.

Regarding the Spanish contributions to these studies, of particular note is Zallo's first and basic distinction between cultural industries and other non-industrialized forms of cultural expressions, namely craft culture, independent culture, and other industrial segments. As for the industrialized part of culture, it can be segmented based on labour

process, capital valorisation process, and product characteristics (Zallo, 1992). In other words, a creative product of a cultural industry is the sum of the way a dominant technology fits into a specific production process, plus a funding method and a social practice.

The study of the cultural industries is constantly mutating and adapting to the context (Bustamante, 2009). This evolving nature involves the maturation of the theoretical framework and even the appearance of new approaches that it has had to deal with for years, notably the creative industries approach. It is not the objective of this study to go into its history, but instead to determine to what extent many of the contributions of the “pioneer” authors are still valid. These days, however, in a digital environment this validation exercise requires rethinking some definitions or perspectives, and the study of Spanish independent podcast networks is a useful starting point for putting mainstream and historical definitions to the test.

Zallo himself, following the field’s aforementioned evolving character, classified the continuities and ruptures between the analogue and digital model in a later work (2016). For example, the mass reproduction and distribution of a cultural product were once in the exclusive hands of a few broadcasting, production, and distribution companies; however, technological universalization broke this exclusivity by allowing anyone with Internet access to replicate and distribute a product without even having established themselves as a company. This would also connect with the idea of “aspirational labour” as described by Sullivan in his study on podcasts (2018) and defined as “free labour offered in the hope or expectation of future (monetary) benefits” (Sullivan, 2018: 36). The author talks about pro-ams (professional - amateurs), “who pursue an activity as an amateur, mainly for the love of it, but [who] set a professional standard” (2018: 41), an idea that we will also see reflected in our study. Would pro-ams become part of the cultural industries? Is there just one dominant technology nowadays? According to the political economy of cultural industries, are the production process, funding method, and social practice of independent networks representative of the broader industrialized culture?

The history of podcasting tells us about some beginnings that focused more on a technological innovation rather than on the creation of a new language (even the word itself was questioned). At that time, some of the earliest academic studies on podcasting viewed it as just another step in the technological evolution of radio as a medium (Lacey, 2008; Menduni, 2007; Sterne et al., 2008), while others focused on podcasting’s disruptive potential (Berry, 2006). For a while, any encapsulated audio content was referred to as a podcast, although “purists” argued that without syndication or a push

system it was not possible to talk of podcasts or podcasting. Indeed, RSS is not just a delivery system but a political trait of podcasts, since it is key for an open access podcasting (Sterne et al., 2008; Berry, 2022). However, technological evolution itself has been responsible for overcoming this detail and the battle for the story, as they say today, now focuses on the ideas of “independence”, “professionalism” and “community”. In an app ecosystem (Morris and Patterson, 2015), RSS syndication is less noticeable and podcast access is easier.

Technology helps, but as Berry points out (2018: 21), the growth of podcasting “must be linked to either user-end enhancements, or the availability of compelling content rather than medium-led technological enhancements”. Academics have brought to light the relevance of contents (creative products), the quality of the production process, and the economic support (funding model) for the development of podcasting, in parallel with the progressive construction of the podcast’s own identity (Bonini, 2015; Berry, 2018; Markman and Sawyer, 2014; Sellas and Solà, 2019). Over the years, podcasting has evolved as a hybrid cultural practice. In Spain, the development of independent podcasting, the media industry’s commitment to the production of native digital podcasts, and the more recent arrival of international commercial companies such as Audible (Amazon), Podimo and Spotify have been key factors in podcasting’s maturation. As Berry suggests (2022: 401), we should consider podcasts as “a medium defined by its participants acting collectively” which can be therefore “marked out culturally, socially, and politically”. In this fashion, changes in the ecosystem transform the reality of that cultural practice, since podcasting “co-evolves together with the network of actors that contribute to shaping its cultural meaning and value” (Bonini, 2002: 26).

Within the evolution of podcasting, podcast networks are important actors who reflect the tensions generated when a grassroots cultural production explores some of the strategies of centralized broadcasting institutions (Heeremans, 2018), which Sullivan (2018: 36) describes as a process of “formalisation”. Even though it is a phenomenon that mainly affects the audio-visual sector, “platformisation” and its production process have also reached audio management. As such, the prominence of platforms has already yielded a rich academic production, represented, among many others, by Ballon (2009), Ballon and Evens (2014), Helmond (2015), Plantin et al. (2016), Andersson Schwarz (2017), Gillespie (2010, 2017, 2018), Evens and Donders (2018), Poell et al. (2019), Sullivan (2019), Evens et al. (2020), Popiel (2020), and Caplan and Gillespie (2020).

In his article on the politics of platforms, Gillespie (2010: 3) defines them as a metaphor: “Like other structural metaphors (think ‘network’, ‘broadcast’, or ‘channel’), the term depends on a semantic richness that, though it may go unnoticed by the casual listener

or even the speaker, gives the term discursive resonance”. And that same idea of metaphor is what Burkart and Leijonhufvud (2019: 176-180) take when talking about “Spotification”, defining it as a “political process” and “as a metaphor for market-oriented cultural policy”. Platform capitalism reaches the foundations of cultural production, whether industrialized or not, and forces us to reflect on and to analyse the phenomenon in a holistic, more global way, as suggested by Poell et al. (2019). The way platforms affect the creative process and labour is defined by Duffy et al. (2019: 6) thus: “Studying the transformations in cultural production wrought by platforms thus requires an appreciation for the mutual articulation between institutional changes and shifting cultural practices”.

Some of these cultural practices are the focus of this article, which explores how grassroots cultural production in Spain is facing cultural industry dynamics, in the same vein as the question Heeremans asks in the first lines of his study (2018: 54): “Can the formation of podcast networks be conceptualised as a category of grassroots production, or does it follow the logic of earlier broadcasting institutions and their business models?”.

## **Methodology**

This is a qualitative study based on the direct observation of Spanish podcast networks, several secondary sources (podcasts, blogs, digital media, newsletters) and, especially, semi-structured interviews with the founders and managers of these networks, following in the footsteps of other similar qualitative investigations into the evolution of podcasting (Berry, 2018; Heeremans, 2018; McHugh, 2016). In order to define and limit the sample, we started with a notion of podcast networks which, drawing on Heeremans (2018), we understood to be conglomerates of podcasts and podcasters whose formation is motivated by the potential advantages this merging entails, such as the overcoming of gatekeeping mechanisms, exchange of social capital, promotion and discovery of podcasts, or exploration of niche and longtail audiences.

From here, we then identified those Spanish podcast networks that were active in 2019. The analysis focused on independent networks, understood as those that do not belong to or are not part of a media group. With this approach, and considering the initial sample, we ruled out two podcast networks that formed part of the media industry: Spainmedia Radio (Spainmedia group) and Podium Podcast (grupo PRISA). Once we had defined the independent podcast networks, we then focused the study and the research interviews on those media groups with the largest production of podcasts and with an established

community around them, according to an initial exploration of their website and their data on social networking platforms.

Although community spirit has been a trait of amateur podcasting since its beginnings (Berry, 2006; Markman, 2012; Markman and Sawyer, 2014), little has been written on independent podcast networks. One exception is the work of Heeremans (2018), which is set within the framework of the political economy of cultural industries and illustrates the tensions between the DIY dynamics of amateur podcasters, on the one hand, and the mainstream commercial logic of an industrialised productive ecosystem on the other. Espada (2018), in turn, completes a descriptive study of four Argentinean podcast networks, two independent and the other two associated with radio companies, whose results expose an entrenched production system, still-uncertain revenue streams and little innovative content. The subsequent article by Terol, Pedrero-Esteban and Pérez-Alaejos (2021), which includes certain networks and the so-called podcasting platforms in Spain, Mexico, and Argentina, reflects productive and business models still under construction.

The present paper aims to contribute knowledge on the evolution of independent podcast networks in Spain, analysing the changes in this non-industrialized form of cultural expression. We aim to analyse to what extent the progressive formalisation of podcasting (Sullivan, 2018) affects its identity and dynamics or generates tensions such as those identified by Heeremans in his article on US-based podcast networks. In the first phase of this study, the sample consisted of five independent podcast networks: Emilcar FM (2014), AVpodcast (2015), La Constante (2016), Nación Podcast (2016), and Cuonda (2015). The first four networks have their origins in amateur podcasting and in the individual activity of their founders. Cuonda was founded on the initiative of a group of digital entrepreneurs with the advice of the Tow-Knight Centre for Entrepreneurial Journalism at CUNY and was awarded a grant by Google's DNI Foundation. These characteristics make Cuonda a singular case to the extent that we might have concerns regarding its definition as an independent network. However, as we will show in the results of our study, it is a network that maintains an independent editorial criterion, and its managers place themselves within the independent podcasting sphere, as opposed to media industry networks. We also omitted two other networks, Por momentos and Sons podcasts, because they are still somewhat minority platforms.

For the preliminary study, we interviewed the founders of these five networks, who manage and coordinate them:

- Pedro M. Sánchez (AVpodcast)
- Luis Quevedo (Cuonda)

- Emilio Cano (Emilcar FM)
- David Mulé (La Constante)
- David Delpueyo (Nación Podcast)

These interviews were conducted in Spanish and then translated responses into English for this article. They lasted between an hour and one and a half hours and were conducted online via Skype in July 2019. One of the interviews (with David Mulé, La Constante) took place face to face in Madrid. According to the main objectives of our study, and taking the theoretical framework and the information from our secondary sources into account, the interviews were structured into four main topics:

- a) The podcast network's identity. The aim was to determine how they define and conceptualize podcast networks.
- b) Podcasting culture and the main characteristics that help identify independent podcasting and distinguish it from the media industry.
- c) Podcasting practices, production dynamics and the criteria for managing the networks.
- d) Monetization and the independent podcast network's business model, if any.

This fieldwork allowed us to draw some initial results. Two years later, the podcasting situation in Spain has changed. For this reason, we carried out a new study on the sample to verify the impact of the changes on the podcasters' perspective and on the role of the podcast networks. On this occasion, the sample included a new thematic network, Redcast, which was created in July 2020 because of the merger of the projects of three independent podcasters who specialize in the field of marketing and ecommerce. It is also worth mentioning that the co-founder of AVpodcast, Pedro Sánchez, left the network at the end of 2019. The project finally ceased updating in September 2020. In the new study, we reinterviewed the podcasters responsible for the analysed networks. The interviews were conducted online between April and June 2021. As a co-founder of Cuonda, Ángel Jiménez de Luis was interviewed instead of Luis Quevedo (who, for pandemic-related reasons, was unable to assist the authors), while a new interview with one of Redcast's co-founders, Pol Rodríguez, was added.

The semi-structured interviews again focused on the main topics discussed previously but were complemented with different questions regarding the evolution of the networks over the last two years. In both the first and second round of interviews, the responses to the questions were transcribed and shared in a common document to allow the authors to establish similarities and differences. In the second round of interviews, each interview subject was shown the transcription of his statements from two years before and was asked if he would change anything he had asserted at that time and, if so, why.



## Results and analysis

We present the main results of our analysis of the sample podcast networks, which are divided according to the blocks in which the interviews were structured. Once the results have been introduced and analysed, we synthesise the main insights obtained in the present field study in Table 1.

### *a) The podcast network's identity*

As previously mentioned, the study has been focalised on independent podcast networks in Spain. 'Independent' is a term the founders of these networks identify with. Although three of the observed networks have their origins in amateur podcasting, they prefer the term 'independent', since the term 'amateur' can have negative connotations: "We are amateurs in the sense that we are nonprofit. But I prefer the term independent, even as a form of provocation, against the big media groups" (Pedro Sánchez, 2019, personal communication). In contrast, they defend their professionalism, a term that does not necessarily mean making a living from podcasting or dedicating themselves exclusively to it. Professionalism can be understood as caring for the quality of sound, investing time, and persevering in the development and operation of the network, having good technical equipment or even having knowledge of the subject they discuss in their podcasts. In some cases, they also carry out consulting and production work for their clients, who value their experience and knowledge of podcasting. Moreover, the term 'independent' allows a wide range of podcasters to be covered, from the majority of amateurs to those who want to convert podcasting into their professional project but who share the common characteristic of having no connection with a company or media group, "with a personal relationship to podcasting typical of the amateur spirit" (Emilio Cano, 2019, personal communication).

Regarding their basic structure, most of these aggregations define themselves as "networks" of independent podcasts and include both people (podcasters) and content (podcasts). To express the idea of the network, some of the podcasters interviewed refer to a "group policy" (Emilio Cano) or "team awareness" (David Delpueyo, 2019, personal communication). In some cases, the network arises from the need of its founder to group several podcasts in its own space, until then scattered across the Internet, and from there, other podcasters became involved. In other cases, the founder included other podcasters, who chose to join to benefit from the project in common. For most of them, monetization was not the initial goal but an approach that they reached over time. The exception is

Cuonda, a network that emerged from the collaboration of three entrepreneurs with the desire to structure a podcasting market in Spanish. In some cases, podcasters have questioned Cuonda's independent nature because of Google's funding and its approach to podcasting as a business. However, Cuonda's relationship with Google consisted merely of an initial investment used to launch the project. Nonetheless, the network has maintained its editorial independence and has sought other economic resources to keep its activity alive. Finally, the youngest network, Redcast, despite being independent, is a clear example of the evolution of podcasting, since it was founded with the clear aim of monetizing its content (Pol Rodríguez, 2021, personal communication).

Some of these networks, however, have evolved over the last two years towards a production company model, to the extent that an emerging market for podcasting in Spanish is developing. This evolution has accelerated with the arrival of Spotify, Audible and Podimo, which has had an impact on the popularity of podcasting and "on the commissioning of new projects" (Jiménez de Luis, 2021, personal communication). These podcasters recognize that the development of the network has been "a preliminary step" that has generated a reputation for them and, consequently, a portfolio of clients (David Mulé, 2021, personal communication). In some cases, professionalization is already understood as a "business will" (David Delpueyo, 2021, personal communication). Those who have evolved into podcast producers use the term 'independent' to distinguish themselves from the podcasting platforms owned by the main media groups. At this point, the term 'amateur' would be for podcasters who make podcasts just as a hobby, maintaining the spirit of podcasting's beginnings in Spain.

In the origins of the networks, the common basis was that a person or small group of people came together to create a network that was not simply a sum of podcasts: "a network has community spirit; it aims to grow and join forces" (David Delpueyo). That was why it was so important that the network had a seal, a distinctive brand, for the podcasts that formed part of them. Their goal was to make podcasts recognizable. In some cases, this objective was achieved through production design, with a concrete structure for podcasts and even through jingles or other distinctive sounds. In other cases, they were characterized by a certain style or by the approach to contents. The graphic design of the podcasts that make up the network was another element used to distinguish them and give them cohesion, including the use of a logo for the network. The notion of brand or seal of an independent podcast network was closely linked to the personality of the founder, especially in the case of the most veteran, who already enjoyed certain prestige in the sphere of independent Spanish podcasting. However, two years later, the personal brand has ended up being more important than the network brand: "The network earned me recognition as a podcaster. When I left, many podcasters

did, too. Maybe personal brand has ended up playing a greater role” (Pedro Sánchez, 2021, personal communication), and potential clients contact them for their personal trajectory and reputation in the Spanish podcasting scenario. They are also hired by advertising and communication agencies, which often act as intermediaries between producers and brands, or companies interested in having a podcast.

Through their identity, podcast networks act as prescribers. One of the biggest difficulties in podcasting is the discovery of new podcasts. In a field characterized by decentralization and dispersion, podcast networks are a meeting point where listeners can find podcasts, either because they arrive there casually, because they discover them through listening to other podcasts or because they go to that network deliberately because it is a guarantee of what they will find. In addition, podcast networks offer a framework that facilitates production: the network makes it possible to turn someone’s idea into a podcast. However, those networks that have evolved into production companies recognize that they now prioritize customer podcasts when carrying out promotion activities. In some cases (Nación Podcast), the production results in a podcast whose content is different from the network’s usual offering, and it has started to focus branding and promotion activities exclusively on podcasts whose creators pay for them to be produced.

Thus, we observe how throughout the two-phase study, the development of the Spanish podcasting market affects the identity of independent networks. We agree with Berry (2022) that most try to keep the DIY spirit, even when their activity has been professionalized. However, the business idea is relevant for the most recent networks and those that have become producers, and commercial pressure impacts their very identity.

#### *b) Podcasting culture*

Independent podcast networks have played a key role in the configuration of the podcasting culture in Spain. The relationship with listeners is one of the keys to that cultural practice. It is a horizontal relationship, between equals, that is characterized by proximity and trust; in some cases, even issues or references to some aspects of the podcaster’s personal life naturally become part of the contents. In addition, independent podcasters enjoy credibility among their listeners because there is a personal commitment to them, among other aspects. In other words, the podcasters of these networks insist on “authenticity” as one of the distinctive elements of podcasting (Emilio Cano, 2019, personal communication).

Unlike mass media, independent podcasting is also defined by freedom, in content and form: “It is telling you different things (...). It has its own language, and what people expect in podcasting is something else” (Pedro M. Sánchez, 2019, personal communication). The podcasters interviewed for this paper insist that freedom differentiates them from radio, not only because the podcasts do not respond to the interests or conventions of a media group, but by the way they address their listeners. “It is a positive point, when you listen to someone who speaks like you”, says David Mulé (2019, personal communication), who even had to “unlearn” some features of his previous radio experience to be able to enter the podcasting world.

The idea of “community” is important in the origins of independent podcast networks. “We were some friends who always talked about series, and in the end, we created a podcast about series. (...) I’ve even made friends with some of my listeners”, adds Mulé. Listeners and followers are not only an audience that listens, but a community with which podcasters relate, even personally. They therefore invest a lot of time in communicating with the community, not only through public channels (social networks, their websites), but also through chats, in groups or individually, and via services such as Telegram. That relationship often translates into meetings in person in which listeners and podcasters converge. Network coordinators insist that podcasting is inclusive and is linked to the idea of conversation. However, the evolution towards the role of producer impacts that initial spirit: “It’s not a community anymore, we’re no longer going to grow together. What I want is for it to be a business and for the business to grow” (David Delpueyo, 2021, personal communication); “along the way there have been colleagues who couldn’t keep up and others who didn’t agree, who wanted to do it as a hobby, and they haven’t kept it up, either” (David Mulé, 2021, personal communication).

The culture of independent podcasting also involves an open-access distribution. Despite some of them experimenting with payment formulas, independent networks choose to make their podcasts available to listeners on each and every podcasting platform and application, their philosophy being “the more the better”. In other words, open access and distributed everywhere. This perspective takes precedence over the risk of losing control (a fear they attribute to the industry). Nevertheless, the emergence of so-called platforms poses significant challenges to this approach because some force the audios to be uploaded again (rehosting) and because of their tendency to put content that by nature is open and multi-distributed into an application or behind a paywall. “As long as there’s RSS, certain guarantees are maintained, but otherwise it will be difficult to listen to podcasts outside these big companies,” points out Jiménez de Luis (2021, personal communication). In this context, the option for independent podcasters is the individual, paid podcast. For Emilio Cano (2021, personal communication), the evolution of the

market “offers a space for podcasters but leaves independent podcast networks as they have been until now”; Pedro Sánchez (2021, personal communication) agrees by stating that “now every large podcasting project will be considered as a production company; new podcast networks will no longer emerge”.

We could say that it is precisely those networks, those with that independent and risky spirit, that have generated an authentic podcasting culture, which in turn contributes to moving closer to industrialization. Paradoxically, we observe how the platformisation of podcasting (Sullivan, 2019) challenges the survival of independent podcast networks as we have known them until now. As Duffy et al. point out (2019: 9), platformisation is a process where “institutional changes are entangled with shifting cultural practices”. The arrival of Spotify, Audible and Podimo is reconfiguring the Spanish podcasting landscape, and independent podcast networks culture is also evolving to fit within an ecosystem where power relations are decisive (Bonini, 2022) and in which independent podcasters try to preserve their space.

### *c) Podcasting practices*

Of the four topics addressed in our study, it is podcasting practices that have undergone the greater evolution over the last two years. When we started this analysis, we observed diversity in the contents offered by these networks. Most of them included common niche podcasts, such as technology, series, history, or video games, among others. There were also podcasts dedicated to podcasting itself (meta-podcasts), and podcasts without a specific topic whose main attraction for the audience was the host’s personality. Beyond these trends, networks tried to develop an editorial line, which was usually related to the point of view of the founder and director of the network. AVpodcast focused on the socio-political and humanistic approach to issues; La Constante started as a network dedicated to series and evolved into a cultural network; Emilcar FM aimed to expand the boundaries of podcasting, with issues that were not usually in this area; Nación Podcast evolved into a niche network, with many educational-themed podcasts and a casual style; and Cuonda aimed to move away from technological issues to produce podcasts that were characterized by their originality.

With their more or less explicit respective criteria, the founders of the networks acted as gatekeepers in which they configured a certain catalogue of podcasts that, being part of the network, had a visibility in the field of independent podcasting in Spain: “The issue of topic is very important. And also, production design. This way, we have a stamp, and people recognise our podcasts” (Emilio Cano, 2019, personal communication). In the same role of gatekeeper, the network founders agreed in this regard to set minimum red

lines for their podcasters. Basically, they referred to freedom in content, but within common sense parameters regarding basic values and respect for people: “I don't prohibit them from anything, within certain limits which they themselves, out of good breeding, know they cannot cross” (David Mulé, 2021, personal communication).

As for the production dynamics, network coordinators monitored the technical quality of the product, especially in those podcasts they wanted to monetize. AVpodcast maintained an amateur spirit in which the founder was limited to a coordinating task, while podcasters contributed their know-how to work cooperatively in the maintenance of the network. A very different model was that of Cuonda in which Luis Quevedo (one of the three founders) took over the technical and production process so that podcasters could focus on content. The other networks followed a mixed model in which some podcasters were able to carry out the entire process while other members of the same network required the support of the coordinator for technical issues. It should be noted that, at Nación Podcast, podcasts made by members of the network coexisted with those produced by the network (and that paid for such production). And at Emilcar FM, Emilio Cano, the coordinator, was paid for his consulting sessions. Internal communication was essential for good coordination among the members of the network, hence their use of applications or services such as Telegram or Slack.

The networks under study had different options in terms of podcast hosting. We found networks owning an infrastructure (Cuonda) and others using external services that specialize in podcasting, such as Spreaker (Emilcar FM, Nación Podcast) or Podigee (La Constante). For its part, AVpodcast opted for a combination that its founder considered “more independent” (Pedro Sánchez, 2019, personal communication): a podcast with WordPress and the plugin for podcasting, Power Press, and hosting offered by a network podcaster in a Spanish hosting company. Beyond the infrastructure used for hosting, podcast networks had an original feed for each podcast from which they were also distributed through the main podcasting applications and platforms, including Apple podcast, Google podcast and Spotify. That original feed also allowed them to statistically track subscriptions, downloads, and reproductions.

After almost two years, a pandemic and associated lockdown, the evolution of these networks is clear and can be summarized, as we mentioned before, in the words of Sullivan (2018, p. 36): they have undergone a process of “formalisation”. Apart from Emilcar FM and the *de facto* disappearance of AVpodcast, the other networks have matured and followed this process of formalisation, which translates into working more as podcast producers for external clients than as independent networks. They have not lost their origins, but the managers interviewed acknowledge that they can spend less

time on their own podcasts and that the appearance of large platforms in Spain, as well as all the contacts made over the years, have allowed them to gain clients and begin to act with more professionalism and less “aspirational labour” (Sullivan, 2018). What has happened is exactly what the author pointed out: “free labour offered in the hope or expectation of future (monetary) benefits” (Sullivan, 2018: 36). Therefore, the production routines, though still experiencing some difficulties, are more like those of a production company. This process of formalisation distances podcast networks and their managers from the amateur spirit which characterised podcasting in its first years in Spain. At that time, radio was using podcasts as a distribution tool alone, while podcasting was advancing hand-in-hand with an independent, grassroots cultural community: making podcasts was a way of having fun, of generating community and sharing a passion with other people with the same interests (Markman, 2021).

#### *d) Monetization*

Monetization has been a controversial issue in the Spanish independent podcasting community for years, but according to some of the interviewees, it is becoming normal: “Now we can already talk about monetization naturally. In our case, furthermore, it is a union to help us and facilitate sales. We are content creators, but also people of marketing, of online business” (Pol Rodríguez, 2021, personal communication). Monetization is the talking point; it is no longer a taboo subject. In the first phase of this study, the podcast networks had different perspectives: AVpodcast did not monetize, while Emilcar FM, Nación Podcast and La Constante did. Cano (Emilcar FM) did not consider podcasting to be his main work, while La Constante and Nación Podcast were trying to do so; Cuonda, meanwhile, wanted to create a market from the beginning. Now, apart from AVpodcast (which is in standby status), all of those interviewed aimed to make a profit from their work, although with nuances in the case of Emilcar FM. Independent podcast networks sought, and still seek, to earn revenue using a wide range of strategies: directly from the podcast, with advertising, sponsorship, and premium content (subscription) in a few cases. In addition to podcasts, they try to monetize through a) the production of podcasts for third parties (companies, brands, other podcasters, and even audio platforms), and consulting and training, b) crowdfunding and, in some cases, c) offering technical services (hosting and distribution. Obviously, the last network to be incorporated into our study, Redcast, proposes an operation closer to that of a production company rather than that of a pioneering independent network from the beginning (Pol Rodríguez, 2021, personal communication).

When the podcasters were interviewed two years ago, they exhibited a certain scepticism regarding business opportunities given that there was no market for independent

podcasting in Spain. Now, still maintaining a certain scepticism and being concerned that a bubble is growing, they believe that an industry is being forged thanks not only to the podcasting culture created by these independent networks, but also to the impact of Spotify and other platforms (in terms of access to podcasts, the popularization of the term and, also, the increasing need of new productions). In this context, the resources available may end up being a decisive factor: “Maybe professional podcasting will come in different speeds. The speed of big producers and media groups, the speed of independent podcasters who turn into producers and the speed of individual podcasters, who take care of their community and maintain a model similar to amateur podcasting” (Pedro Sánchez, 2021, personal communication).

**Table 1. Main topics defining Spanish independent podcast networks**

	<b>1<sup>st</sup> round of interviews (2019)</b>	<b>2<sup>nd</sup> round of interviews (2021)</b>
<b>IDENTITY</b>	<ul style="list-style-type: none"> <li>- Identify themselves as being independent.</li> <li>- Networks: people coming together.</li> <li>- Relevance of the network brand.</li> <li>- Network as a prescriber of podcasters.</li> </ul>	<ul style="list-style-type: none"> <li>- Keep identifying themselves as being independent.</li> <li>- Some have evolved towards production companies.</li> <li>- Personal brand ends up being more important than the network brand.</li> <li>- Those evolving towards production companies prioritize customer podcasts.</li> </ul>
<b>CULTURE</b>	<ul style="list-style-type: none"> <li>- Authenticity.</li> <li>- Freedom.</li> <li>- Different from radio.</li> <li>- Relevance of the community.</li> <li>- Open-access distribution.</li> </ul>	<ul style="list-style-type: none"> <li>- Platforms posing challenges: rehosting; content into an app or behind a paywall.</li> <li>- Market evolution gives a space for podcasters, but podcast networks remain the same.</li> </ul>
<b>PRACTICES</b>	<ul style="list-style-type: none"> <li>- Diverse offer.</li> <li>- Editorial line.</li> <li>- Founder as a gatekeeper.</li> <li>- Technical support.</li> <li>- Podcast hosting: different options.</li> </ul>	<ul style="list-style-type: none"> <li>- Formalisation and less aspirational labour (Sullivan, 2018).</li> <li>- Working more as podcast producers for external clients.</li> <li>- Production routines more like those of a production company.</li> </ul>
<b>MONETIZATION</b>	<ul style="list-style-type: none"> <li>- Controversial issue for years.</li> <li>- Different perspectives: some monetized; some didn't.</li> <li>- Sceptical regarding business opportunities (no market for independent podcasting in Spain).</li> </ul>	<ul style="list-style-type: none"> <li>- Becoming normal.</li> <li>- Interviewees aimed to make a profit from their work, although with nuances.</li> <li>- Variety of strategies: directly from the podcast, with advertising, sponsorship, and premium content (subscription) in a few cases.</li> <li>- In addition to podcasts, through a) the production of podcasts for third parties, and consulting and training, b) crowdfunding and, in some cases,</li> </ul>



		c) offering technical services (hosting and distribution). - Still sceptical but believe that an industry is being forged.
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## Conclusions

All the networks studied here doubtlessly define themselves as independent, despite some nuances in the case of Cuonda (nuances that are blurring rapidly, since some of these networks are moving towards its business model and principles). With this definition in mind, they maintain a certain distance from other networks integrated into media groups. Furthermore, these networks prefer to identify as *independent* because they link that term with a certain level of professionalism. It is not that they consider the word *amateur* to be an insult, but they do highlight the need to reach some minimum quality standards, especially in the technical aspect of recording, editing, and distributing, even if they do not obtain any monetary benefit.

Regarding our question as to whether they represent an example of grassroots production or whether they are moving towards the production process of a cultural industry, we could say that they represent a combination of the two. Indeed, the podcast allows the theoretical discourse on non-industrialized forms of communication to be revived. It is the praxis and the will of those who practice podcasting that most define these networks. However, as we pointed out, the term “cultural industries” needs to be redefined because podcasting is an example of a communicative practice that maintains its willingness to create a community (thanks to technology) despite its ability to reproduce contents ad-infinity, a characteristic previously reserved only for the so-called mass (reproduction) media.

Under this scenario of independent, non-industrialized podcasting, mass reproduction and distribution are possible because technological universalization facilitates it, although there are still two major differences with industrialized audio: profit (business model, where the money is) and metrics (where the audience is and how can be measured). Historically, non-industrialized forms of culture did not care too much about the latter and, with regards to profit, at least podcasters sought to survive, obviously, although podcasting could often represent a personal expense for them.

Monetizing audio production has been always difficult, especially as Spanish audiences are accustomed to listening for free (Sellas and Bonet, 2017). Independent podcasting faces the same difficulties. So far, there has been no structured market for podcasting. In

Spain, independent podcasters who can live from podcasting are rare cases. Advertisers are still in short supply; paid podcasts are scarce, and revenues come from complementary activities. Nonetheless, since it is a dynamic sector, it remains to be seen how the monetization of podcasting will evolve in the near future.

Technological universalization allowed the podcast to be created as a technological solution for distributing audio files and to eventually become a form of communication, as happened a century ago when, in the search for a way of communicating that did not need wires, for military and commercial purposes, point-to-point broadcasting was developed; within a short period of time, society made it their own and turned it into a means of mass communication: radio broadcasting.

In the interviews we conducted (both these and others carried out in previous studies), there is much emphasis on differentiating from radio. However, those interviewed here always referred to large radio groups as an example, but radio is much richer in terms of its variety and complexity. Podcasters insist on defining themselves through terms such as authenticity, freedom, experimentation, or proximity. And they highlight the creation of a community as a distinctive element; a community with whom they talk personally, one on one, in a dynamic of equals that contrasts with the vertical relationship attributed to the mass media. Independent podcast networks contribute to defining the identity of podcasting, and in that sense this identity is different from mainstream radio. There we can clearly see the difference in the relationship large radio networks have with their audiences, but the distance is shortened if we think in terms of community/free/alternative radio.

In just two years, professionalism and quality have increased but so has the risk of losing independence, not because a network can be absorbed or acquired by a large group but because of the power and influence of platform capitalism and its algorithms. Until now, Spanish independent podcast networks have represented an interesting combination of grassroots practices and a process towards industrialization, considering that the latter does not depend exclusively on them but also on other actors such as traditional radio broadcasters, other production companies and the audience itself. This study of podcast networks illustrates how the progressive formalisation of independent podcasting in Spain has generated tensions in the grassroots-industrialization balance. Spanish independent podcasters are pro-ams entering the production process of an industry in which other industrialized actors have already been established. Podcasting is therefore a good example of how industrialized and non-industrialized culture and communication interact in the context of a new century based on digitalization.

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