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A two-dimensional approach to the study of podcasting in Spanish talk radio stations

ABSTRACT

Over the last decade, technology has transformed traditional radio broadcasting, not only as a mass medium but also as a cultural industry. Podcasting has been adopted by broadcasters as a useful tool for radio on demand. For broadcasters, it also offers the opportunity to explore new formats and new radio content and the possibility of reaching listeners in new ways. This article discusses the use of podcasting by the main radio networks in Spain. It is based on a quantitative study amongst broadcasters, focused on those chains that have adopted podcasting to offer some of their conventional broadcast programmes. The aim of the present study is to establish which elements of programming and business strategies are motivating the use of podcasts by these radio stations. In addition, this article also provides a first approach to the main genres and programmes supplied in this format.

INTRODUCTION

Podcasting, a system for the automated distribution and reception of audio content, arose in 2004 from the fusion of pre-existing technologies: digital audio and web syndication (Sellas 2009). Its main contribution is the automation of the process through which the broadcaster distributes content

and the user receives it, to later listen to it on his/her personal computer or portable digital player. But beyond this perspective, it is an instrument giving people who are not radio professionals the chance to become producers and distributors of audio content. Similarly, it provides a new means of dissemination for traditional media, as well as an opportunity to experiment with new content.

Podcasting entered the radio industry scene between the middle of 2004 and the beginning of 2005, first through a private initiative by some professionals in the United States, and later when public corporations, such as the BBC in the United Kingdom, the CBC in Canada or the NPR in the United States, began experimenting with this new tool. In Spain, the first broadcasting network to incorporate podcasting was Cadena SER, which began its service on 10 April 2005. Since then, the majority of general Spanish broadcasters have incorporated it. This article analyses the use of podcasting by talk radio stations in Spain. The main objectives of the study can be summarized as follows: (i) to explore the use of podcasting as a tool for the dissemination of audio content and quantify the podcast offer of broadcasters; (ii) to determine the programming and business strategies that give rise to the use of podcasting in radio companies; (iii) to carry out an initial assessment of the programming genres most offered as podcasts; and (iv) to identify the factors conditioning the integration of podcasting in the production routines and contents of broadcast networks.

The analysis is performed through a quantitative study of podcasting amongst broadcasters. The data has been collected through the study of podcast figures published by broadcasters on their websites. The chosen sample comes from the top ten talk radio stations in terms of audience figures in Spain, according to the Estudio General de Medios (EGM), a private body commissioned to monitor and publish radio audience figures in Spain. The radio stations analysed are Cadena SER, Onda Cero, COPE, RNE, Punto Radio, Catalunya Ràdio, RAC1, Canal Sur Radio, Radio Euskadi and Radio Galega. This sample enables us to include the main public broadcast networks (RNE, Catalunya Ràdio, Canal Sur Radio, Radio Euskadi, Radio Galega), as well as private (SER, Onda Cero, COPE, Punto Radio, RAC1) and national networks (SER, Onda Cero, COPE, RNE, Punto Radio), and regional radio (Catalunya Ràdio, RAC1, Canal Sur Radio, Radio Euskadi, Radio Galega). However, as the analysis focuses on the podcast offer, I have excluded the Galician public broadcaster Radio Galega, despite its tenth place in the EGM ranking, because it does not offer a podcasting service from its website: its inclusion in the quantitative study would have distorted the results. Since the analysis focuses on the top ten stations in the EGM, it excludes other interesting podcasting experiences developed by networks of local stations, such as COM Ràdio (in Catalonia) or OLA (in Andalusia).

Monitoring took place from Monday to Sunday throughout September 2010. The quantitative study was complemented by a qualitative methodology designed to capture the perspective of the broadcaster, through in-depth interviews with the managers of the radio stations with the greatest podcasting offer. The central topics of these interviews were the programming and business arguments and strategies that supported the incorporation of podcasting, the difficulties arising from the implementation of the podcasts, and the future possibilities and challenges that this new tool created for the radio network.

PODCASTING WITHIN THE CONTEXT OF THE TRANSFORMATION OF RADIO

The digitalization of Spanish radio began at the end of the 1980s, when some radio stations, such as Catalunya Ràdio, Cadena SER or Cadena COPE, began the technological renovation of their installations (Bonet 2007a). This digitalization process in production and editing was consolidated in Spanish radio throughout the 1990s, and was an improvement for professional routines. However, the simplification of the internal dynamics of radio stations has not been translated into innovation in content, but rather has resulted in greater routinization of production and greater standardization of the offer (Hendy 2000; Starkey 2001). Yet Spanish radio networks continue to focus the debate on technology and standards of dissemination. In the mid-1990s, it seemed that Digital Audio Broadcasting (DAB) would be the radio of the future (Lax et al. 2008; Shaw 2005), but the development of digital terrestrial radio has, in fact, come to a standstill. According to Bonet et al. (2009), this situation can be explained by factors such as broadcasters' doubts regarding the Eureka 147 standard (the technical name for DAB), the economic cost, the appearance of new radio stations with no broadcasting experience, the lack of synergy with sectors such as the automobile or consumer electronics sectors and the lack of real demand from society. But while digital terrestrial radio continues to wait and watch, digitalization allows radio content to also be disseminated through other platforms, such as the Internet, satellite and mobile telephony.

Radio on the Internet began in the 1990s, with the first pioneering experiences of audio dissemination on the net, and during the course of the decade the software necessary to listen via streaming was developed (Ribes 2001; Sawyer and Greely 2000). In Spain, Radio Teknoland was the first native online radio station, and in 1996 Catalunya Ràdio became the first traditional radio broadcaster to broadcast live on the net. From the end of the 1990s, Spanish radio stations expanded their Internet services and began to offer online audio content, either live or on demand; at the same time, they improved the quality of streaming and began to offer other products. Years later, in 2004, they incorporated podcasting.

Internet radio has some specific features that allow radio broadcasters to go beyond their conventional offer. Following various authors who have studied Internet radio (Barnard 2000; Cebrian Herreros 2007; Priestman 2002; Regal 2005), we can establish these distinctive points: (i) it does not require an administrative authorization or licence; (ii) the necessary infrastructure is minimal compared to traditional radio; (iii) it does not have territorial limitations; (iv) content is not limited to audio and the station websites are multimedia platforms; (v) communication overcomes the determining factors of linearity, simultaneity and fleetingness of traditional radio. Internet radio also offers an opportunity for greater interactivity with the audience. For this purpose, radio should apply on the Internet the distinctive principles of Web 2.0, such as the value of metadata, and the potential for collective intelligence, folksonomy or web syndication (Ribes 2007).

Podcasting is a part of this development of Internet radio, increasing the provision of online radio. The offer of on-demand content gives access to further innovations, such as web syndication. The listener can subscribe to those programmes or sections of interest, and the whole subscription and reception process is automatic, including the transport of that content to a portable digital music player. Podcasting allows the time and space limitations of

traditional radio to be overcome, and provides users with the capacity to choose how to use their time (time-shifting; Massarelli and Perrotta 2006). It breaks the synchrony of traditional radio, allowing the listener to choose asynchronic listening depending on their needs and preferences, beyond the tyranny of radio station programming schedules (Menduni 2007). Users gain power against the schedulers, as they decide what they listen to, and when, how and where to listen, and this is a very important change for radio broadcasters (Berry 2006). The fleetingness of the radio broadcast also disappears, as podcasts are not transitory, and listeners can also configure their own personal audio archive. In addition, radio stations are able to make their audio archive available to listeners in podcast format.

Podcasting is also an opportunity for radio broadcasters to meet the specific demands of the audience or to expand and improve their offer (Sellas 2009). On the one hand, podcasting allows content disseminated by broadcasters over the air to be segmented and offered as themed packages. This provides a way to optimize material and human resources, as the radio station can offer as podcasts content which was cut from programmes due to space and time restraints. On the other hand, podcasts are an outlet for exclusive and specialist content aimed at a minority but selective audience, complementary to the conventional offer. In this sense, it is also worth proposing the use of podcasting to experiment with new content, to try out new talent or to explore collaboration with independent podcasters. Personal podcasts of prestigious radio station professionals would be another way to enrich the corporate and communication products of a radio station.

For traditional radio broadcasters, podcasting can be a way to connect with those sectors of the population not incorporated as listeners. The distancing of youngsters from traditional radio is one of the main problems for radio broadcasters (Martí et al. 2010; Ofcom 2004). Their demands are those of a generation that has grown up in an environment where digital technology is commonplace, and are informed by factors such as mobility, the ability to make decisions, freedom of choice and alternation of content, or the generation of one's own universe (Albarran, Horst and Khalaf 2007; Ferguson, Greer and Reardon 2007; Meneses 2008). Through podcasting, broadcasters can respond to these demands. But at the same time, contributors from beyond the fold of traditional radio have the opportunity to infiltrate the universe of audio content, whether they be other media or independent podcasters (Gallego 2010).

Podcasting provides many opportunities for radio, but at the same time it is a challenge that affects the very nature of radio. In one respect, radio has traditionally been considered the home of expertise in audio processing and management, as well as of real-time information. Now, however, it must accept that it no longer holds the exclusive rights to audio content, while other Internet resources argue their supremacy in the immediate provision of information. Conversely, in the context of the studies on cultural industries, radio has always been within the scope of flow production: products with continuity in time and wide dissemination. But now it is adopting features of discontinuous production, through on-demand radio or podcasting services (Bonet 2007b; Zallo 1992). At the same time, users separate themselves from the link with the radio station and prioritize the type of content. This evolution has led the radio industry to consider a possible change of model: from the business of radio to the business of content. In this context, perhaps we should begin to talk about 'audio media' and 'audio programmes': radio, and its various extensions (Tacchi 2000), with podcasting among them.

PODCASTING IN THE SPANISH TALK RADIO STATIONS

The first Spanish radio station to incorporate podcasting was SER, on 10 April 2005. It was an initial experiment, offering a selection of content from four of its programmes via podcast. A few weeks later, COPE also offered its first podcasts, basically some sections from its main programmes. In September, the team from the 'L'internauta', a programme from the public radio station Catalunya Ràdio, began to experiment with podcasting, and the station fully incorporated it in February 2006 when it renewed its website. Prior to this, at the end of 2005, another Catalan public station, COM Ràdio, began to offer a selection of its content through a single podcast. Since these early initiatives, the majority of Spanish talk radio stations have incorporated podcasting. Their strategies depend on their capacity to respond to the needs of broadcasters as well as listeners. In Table 1 and Figure 1, we can see the absolute podcast figures for the analysed broadcasters.

According to audience figures, the top nine talk radio stations in Spain provide podcasting. Their basic strategy is to complement the conventional radio offer with another channel of distribution and to provide listeners with more listening options. The broadcasters are aware of the changes in

Radio network	Full programme	Section	Mix of content	Total	Percent
Ser	10	1	8	19	4.15
Onda Cero	8	0	8	16	3.49
Cope	20	0	9	29	6.33
RNE	51	1	5	57	12.45
Punto Radio	15	0	8	23	5.02
Catalunya Ràdio	32	126	4	162	35.37
RAC1	18	96	0	114	24.89
Canal Sur Radio	24	0	0	24	5.24
Radio Euskadi	9	1	4	14	3.06

Table 1: Number and typology of podcasts at Spanish talk radio stations.
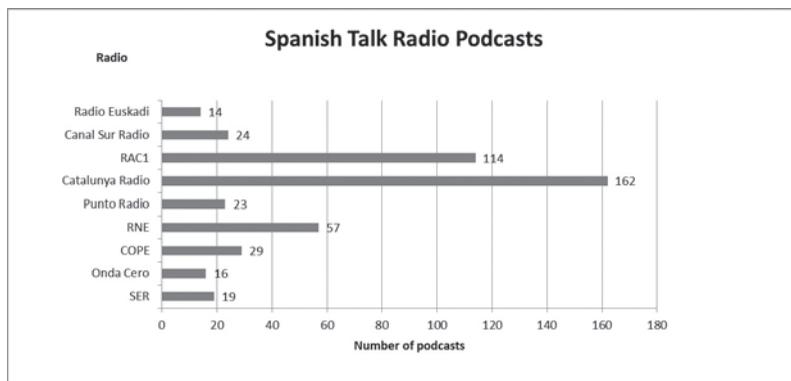

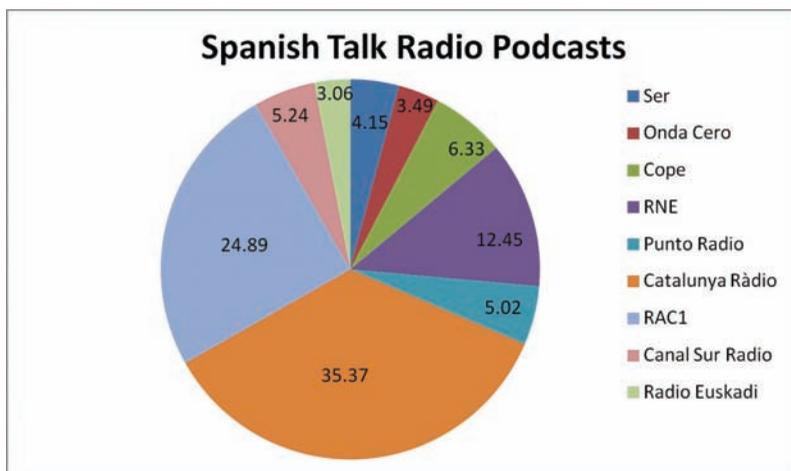*Figure 1: Number of podcasts from Spanish talk radio stations.*

Figure 2: Percentage of podcasts at Spanish talk radio stations.

the audience's habits, so they try to offer their content in all the ways that listeners might demand. Beyond these initial ideas, the data reveals significant differences in the use of podcasting between the main Spanish talk radio stations. Of the nine stations analysed, only three exceed 50 podcasts. According to the data collected in September 2010, the total number of podcasts for these nine radio stations is 458. If we analyse them individually, we can verify that two of them stand out above the rest. These are Catalunya Ràdio (a Catalan public radio network), with 162 podcasts, and RAC1 (a private radio network, also Catalan), with 114 podcasts. The third highest number of podcasts is from the Spanish public radio station RNE, which follows at a distance with 57. The rest range between the fourteen podcasts of Radio Euskadi and the 29 of COPE. The percentage analysis also reflects these differences, which we can see in Figure 2:

These percentages clearly reflect the weight of Catalunya Ràdio, RAC1 and RNE against the rest of the stations. These three amount to 72.71 per cent of the podcasting offer of general Spanish radio. What are the factors that explain these quantitative differences? Conversations held during the research period with management staff from several of the stations analysed enable us to detect some common determining factors, together with other specific elements that explain this diversity.

Public broadcasters versus private broadcasters

We see that public radio leads this process of incorporating podcasting in Spain, particularly evident in the cases of Catalunya Ràdio and RNE. Of the nine radio stations analysed, the four public broadcasters with a podcasting offer (RNE, Catalunya Ràdio, Canal Sur Radio and Radio Euskadi) account for 257 podcasts, 56.11 per cent of the total (Figures 3 and 4). The managers of the public radio stations highlight their remit of service and their vital role for the functioning of a democratic society. Podcasting is part of a strategy to establish a new relationship with listeners, who can access new services, and to acquire more prominence (Salgado 2010). Catalunya Ràdio, for example,
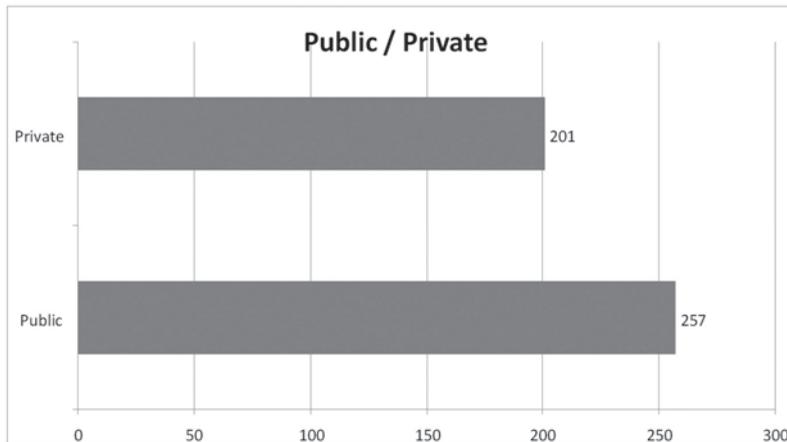
Figure 3: Number of podcasts: Public broadcasters versus private broadcasters.

launched in 1983 with the mission, according to the mandate of the Catalan Parliament, to offer a quality public service committed to ethical principles and the promotion of the Catalan language and culture. For its directors, this entails the obligation of guiding content and technological innovation to evolve in accordance with audience trends (Sarsanedes 2008). They consider podcasting to be technology that improves the attention of listeners and gives them choice.

In the private sector, RAC1 stands out, with 114 podcasts, 24.89 per cent of the total. This is an unusual case, when compared with other private stations (SER, COPE, Onda Cero, Punto Radio), all of which have smaller podcasting offers. This is explained by the nature of RAC1. It is a young radio station, founded in 2000, and which in only one decade has had a significant increase in its audience figures, to the point of disputing the leadership of Catalunya
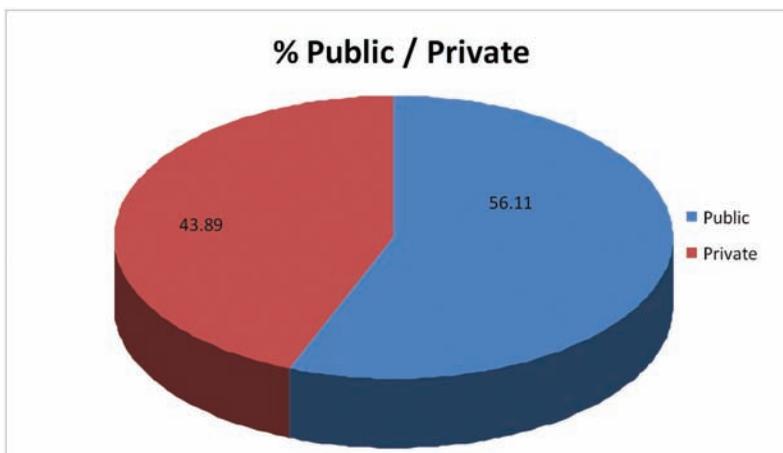

Figure 4: Percentage of podcasts: Public broadcasters versus private broadcasters.

Ràdio in the Catalan talk radio rankings. It is based around light entertainment programming and also incorporates some sports slots produced by young professionals who know how to connect with young listeners, the audience segment that talk radio does not manage to engage. This is the kind of audience that enjoys listening to the radio through the Internet or through programme podcasts. In this sense, the figures depend on the type of programme and the listener's profile. The comedy slot 'La competència', for example, has an average of around 5000 online listeners daily, and leads the download figures for Spanish radio on Apple's iTunes platform, with an average of 4500 downloads per day. Compared to RAC1, in the area of private radio, the SER network must also be highlighted. It pioneered the introduction of podcasting in Spanish radio, but it has since reached a standstill, and its offer is very similar to that which it launched originally in April 2005. This is in part due to the fact that this network is in the middle of the reorganization and renovation of its presence on the Internet, which will also affect its podcasting offer.

Catalonia and the rest of Spain

We also see another differentiating factor in the podcasting offer of radio stations: that of territorial area. In this respect, Catalonia is the autonomous community that most commonly implements podcasting among Spanish talk radio stations. Catalunya Ràdio and RAC1 amount to 276 podcasts, 60.26 per cent of the total (Figures 5 and 6).

These data are a reflection of the degree of experimentation and innovation in Catalan radio, which has been a constant throughout the history of radio in Spain. In the case of this study, the substantial presence of Catalan broadcasters in Spanish talk radio podcasts arises from Catalunya Ràdio's desire for service and innovation, and the above-mentioned specificity of RAC1. Therefore, although the two stations have different motives , the result is a similar offer of podcasts. In the case of RAC1, podcasting, and the use of social networks, is a product that is 'natural' for their target audience (young
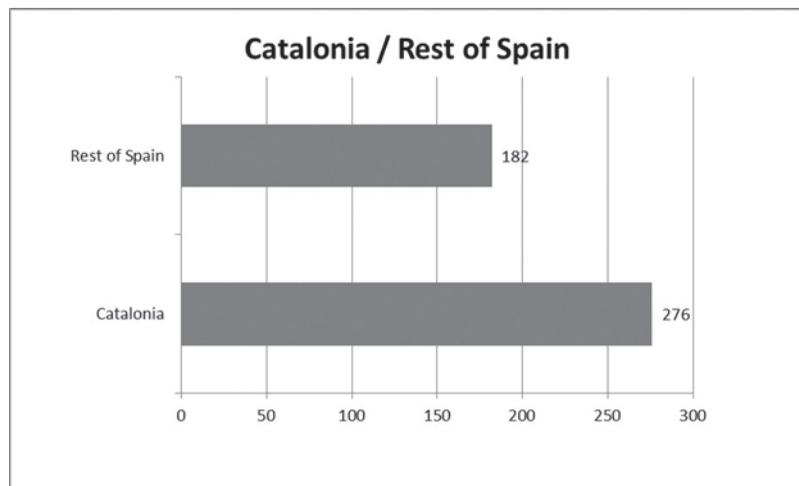

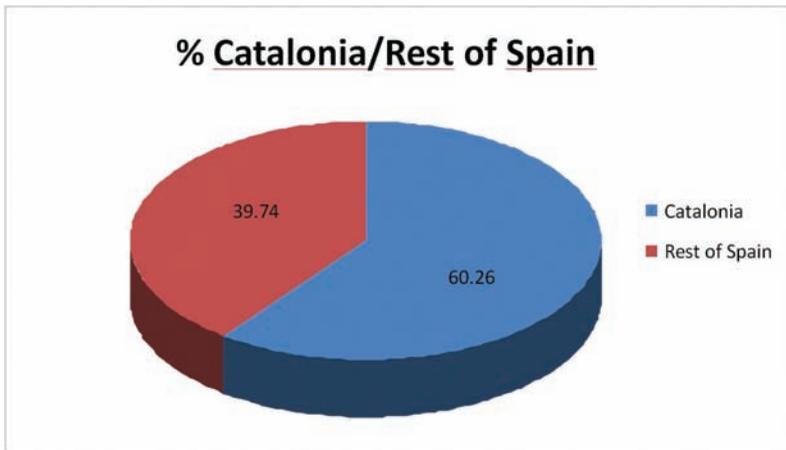*Figure 5: Number of podcasts: Catalan stations versus the rest of Spain.*

Figure 6: Percentage of podcasts: Catalan stations versus the rest of Spain.

and technologically able) (Ganyet 2008). On the contrary, the integration of podcasting at Catalunya Ràdio requires greater 'evangelization', among producers as well as listeners (who have an average age of around 50 years) (Bigorra 2010). However, the figures support this commitment. The most downloaded podcast for Catalunya Ràdio is from the 'L'ofici de viure', with 379,000 downloads per month.

Typology of podcasts

The leadership of Catalunya Ràdio and RAC1 in the integration of podcasting also results in much greater segmentation of content than in the other radio stations. Along with the number of podcasts, I also analysed their nature and was able to construct a typology. From the analysis, I distinguish three kinds of podcasts: those that correspond to a **complete radio programme**, podcasts of **sections of programmes** and podcasts that are a **mixture of content** selected by the radio station. Section podcasts are those that enable listeners to have greater decision-making powers over the content they want to listen to. The more the programming of a radio station is segmented into podcasts, the more options there are for listeners. Programme podcasts enable some choice, but less than sections. Finally, mixed-content podcasts chosen by the radio station give less freedom to the listener, as they have to listen to what the station decides to give them. Of the three types, this is the kind of podcast that reserves some of the decision-making power for the radio station, rather than the receiver, in terms of the listening process. Figure 7 shows the typology of podcasts offered by the radio stations analysed.

The difference between Catalunya Ràdio and RAC1 and the rest is clear. They are the only two radio networks with a good offering of section podcasts. Out of the 162 podcasts from Catalunya Ràdio, 126 are sections of the various programmes it broadcasts. In the case of RAC1, 96 of its 114 podcasts are sections. This responds to the objective to enable listeners to choose, even down to the smallest detail, the content that interests them. Both stations segment via podcasting all those slots that can be segmented. This trend is particularly noticeable in the case of the large magazine programmes,
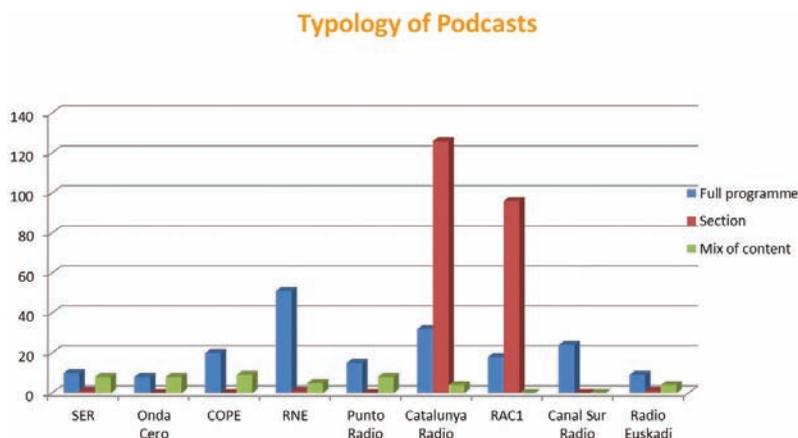
Figure 7: Typology of podcasts: Full programme, section or mix of content.

characteristic of Spanish talk radio, in which there are many sections and collaborators. For these stations, they are often also the programmes with the greatest audience. Through podcasting, the listener can freely choose from a wide range of content. In addition, both radio stations also offer the podcast of the entire programme, in case the listener wishes to subscribe to the whole slot instead of only listening to podcasts of some sections. The figures for RAC1's morning show, 'El Món a RAC1', show the benefits of this double option: 83,000 monthly downloads of the programme podcasts and 93,000 section podcast downloads (Miró 2010).

The rest of the radio stations which I analysed opted particularly for podcasts of complete programmes or mixed content chosen by the station, in the way of a 'best of'. They are fragments of the main programmes, such as the morning or afternoon magazine, or the station's star sports programme. This, however, responds to the pragmatism and difficulties of integrating podcasting into the production routines of the radio stations, rather than representing a strategic decision. It is technically simpler to 'podcast' complete programmes than sections. Fragmenting programmes requires personnel to be specifically assigned to listen to the programmes, in order to segment and cut the audio every time a new section starts. If the podcast is that of a complete programme, or hour by hour, it is only necessary to look for the beginning and the end. The core problem arises from radio production processes, which still relate to a traditional approach to understand how to make radio. Even those radio stations with a large podcasting offer consider how they might improve the production of podcasts. In Catalunya Ràdio, an external company is commissioned to segment the programmes, label the podcasts and upload them to an Internet server. Part of this process is automated, but human participation is needed to select and label the content. In RAC1, this task is done by the technicians for each programme, as part of their daily tasks. From the interviews held with the managers of the analysed stations, it is obvious that there is a need to find new audio production and management mechanisms, which would be based on a content management platform and more universal processes, not just aimed at producing traditional radio (García-Lastra 2008).
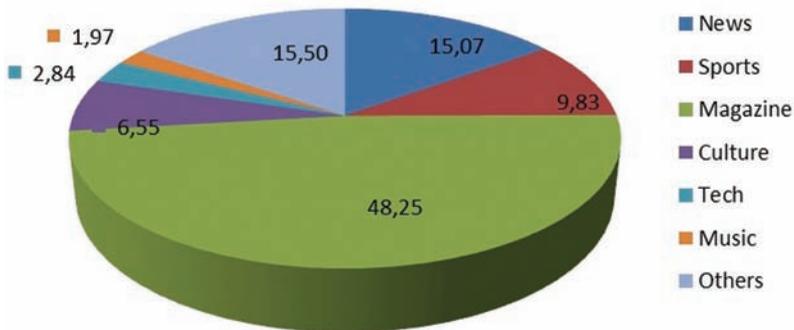
% Programme genres

Figure 8: Spanish talk radio podcasts: Programme genres (by number).

Programme genres

The content that talk radio stations offer through podcasting is a reflection of talk radio programming even in the kind of programme genres offered. Due to historic circumstances and its evolution over time, Spanish radio corresponds to a specific model, halfway between that of North American commercial radio and the European public service model. This results in programming that combines long radio magazines (morning, afternoon or weekend) with slots that are shorter and more specialized. With regard to the podcasting offer, this is reflected in a predominance of podcasts that correspond to the magazines and their diverse sections; these make up almost half of all the talk radio podcasts (Figures 8 and 9).
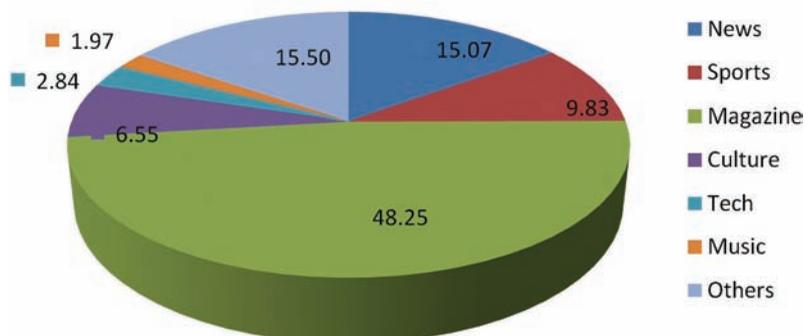
% Programme genres

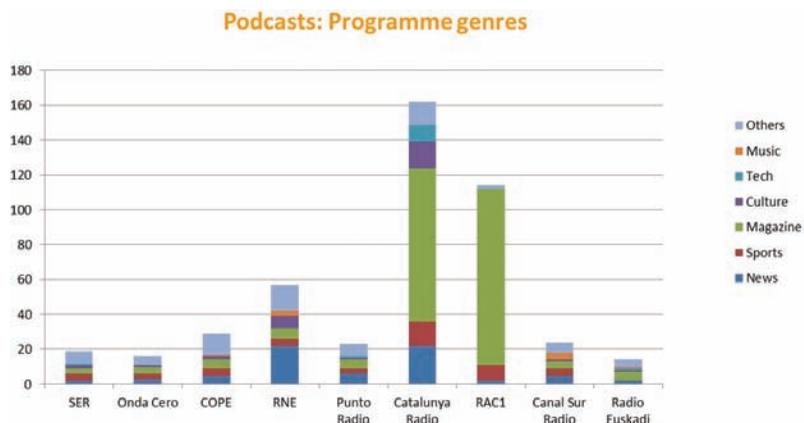*Figure 9: Spanish talk radio podcasts: Programme genres (percentage).*

Figure 10: Spanish talk radio podcasts: Programme genres (by stations).

This presence is due in good part to the offer of Catalunya Ràdio and RAC1. Catalunya Ràdio presents 23 podcasts of its morning magazine, 'El matí de Catalunya Ràdio', 24 from its afternoon magazine, 'El secret' and 19 from its weekend magazine, 'El suplement'. RAC1, for its part, has seventeen podcasts from the morning magazine 'El món a RAC1', sixteen from the afternoon magazine 'Versió RAC1' and 24 from the weekend magazine 'Via lliure'. In contrast, the other radio stations choose to centralize their offers in a sole podcast of their respective magazine programmes and many podcasts of themed programmes.

Analysis of the most commonly offered programme genres also reflects, generally speaking, the kind of content found on Spanish talk radio, which is based on information, entertainment and sports, with the most common format being that of the magazine. As we see in Figure 10, there are few podcasts of cultural and musical programmes. It is a result coherent with a kind of radio in which music, except in the case of specific programmes, is a formal and narrative resource rather than content itself (for this there is music radio). Music podcasts also entail legal difficulties due to author's rights. As regards culture, this is a kind of content that is included in the magazine programmes rather than in specific programmes. Alongside the magazines, podcasts of news and sports slots also stand out.

CONCLUSIONS

This article is an analysis of the present situation of podcasting in Spanish talk radio. As observed, the main radio stations have incorporated podcasts as a tool for distributing audio content. Station managers agree when assessing the potential of podcasting and on proposing possibilities for use. But these proposals are far from the facts of the situation.

The integration of podcasts is very inconsistent among the broadcasters analysed, and is insufficient in the majority. Only Catalunya Ràdio, RAC1 and RNE have a broad and diverse range of podcasts to present their content. This inconsistency comes from structural factors and from the lack of a clear strategy on the use of podcasting. The three radio networks mentioned are based on the basic criteria of offering as many podcasts as possible, but they have not yet managed to resolve the difficulties of integrating podcasting into

the audio production and management process. The rest of the talk radio stations are still far from this point. The desire of public radio to serve is one of the driving forces behind the integration of podcasting, and this explains the development of the podcasting service of Catalunya Ràdio and RNE. However, these represent limited examples: the public broadcasters Canal Sur Radio and Radio Euskadi offer few podcasts, and Radio Galega does not yet incorporate this option. In private radio, the integration of podcasting has come to a standstill, with RAC1 representing a unique case.

Spanish talk radio stations need to develop a new audio production and management model in which segmentation and labelling of content is simpler and more practical, so that the creation of podcasts is easily synchronized with the rest of the process. The mechanisms that are currently used do not facilitate it. As a result, stations have not managed to involve their professionals, particularly journalists, in this task – they do not think about podcasts. It is necessary that any change to the system also makes this involvement possible. This requires a change in mentalities and routines, a task that is particularly difficult in those stations with a large structure and many professionals who have spent years doing the same thing.

While radio stations maintain their current model of making radio, consideration of exclusive content for podcasting can be nothing more than a thought experiment (even the segmentation they offer is far from enabling listeners to create their own personal thematic radio). The type of content that could be exclusively broadcast via podcasting would be that which, due to its low number of potential listeners, does not meet the demand threshold for broadcast radio. In other words, these would be products aimed at small niches of users. With this, and particularly in the case of public radio, there would also be room for service podcasts, aimed at ethnic, religious or cultural minorities, podcasts in other languages to explain the reality of the country or community, and even podcasts produced by professionals from the radio station to complement their journalism work, among other examples. Currently, the exclusive podcasting offer is limited to isolated cases. Catalunya Ràdio offers the celebration of the Eucharist in the Monastery of Montserrat, three programmes on sardanas (a typical Catalan dance) and a summary of the news for 2009. RAC1, for its part, offers a podcast of a special programme about its tenth anniversary. It should also be mentioned that both Catalunya Ràdio and RNE include regional news programmes in their conventional programming, outside the central activity of the radio station. These news programmes can also be downloaded as podcasts, so that listeners from other regions or provinces can listen to news from other areas.

However, the complexities of the production processes make it difficult for radio stations to take this step forward or to propose the inclusion of podcasts from independent producers who work outside the radio station. Restrictions also affect podcast metadata, which is usually limited to the name of the programme, the producer and the radio station. There are, however, certain formats of enhanced podcasts that would allow this information to be expanded, and to incorporate images and hypertext.

Together with structural problems, the other big handicap for greater development of podcasting is uncertainty regarding its marketing. Podcasting is a tool that has still not managed to consolidate a business model (Crofts et al. 2005). Due to its characteristics, it enables a target audience with a highly defined profile to be reached, as well as offering specific subscription and download figures. The challenge for radio broadcasters is to convince advertisers and media centres of the attractiveness of podcasting. The sum of many

small niches of listeners could form a large and sufficient group of potential consumers and the characteristics of this channel would allow new advertising methods to be explored. As specialists in the creation of quality audio content, radio broadcasters could even propose making the most of their speciality by offering external podcasting services to businesses or institutions that want to use this new channel to disseminate their messages or promote their products. But, to date, the business potential for podcasting remains only a proposal.

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