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Miscellaneous

Platforms as audio discovery ecosystems: What Spotify's podcast rankings tell us about the way platforms appropriate the format

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Abstract

Contemporary mediation gravitates around platforms, central structures where users and content converge. As the pivotal format for mediation through sound, intersecting culture, economy, technology and social processes, podcasting has drawn the attention of platforms which have been investing heavily on attracting/retaining producers and listeners alike, by facilitating production, securing the rights to exclusive content, and providing unique ways to interact with content. In this article we analyze Spotify's Top Podcast rankings in Portugal, using descriptive analysis to identify and characterize content, to determine how discovery is promoted and how diverse is the content being presented to users, determining their perception of the format. We argue that content diversity is central to a format that has become mainstream within contemporary digital and audio culture, through the convergence of independent and mainstream producers in the unique content sphere of podcasting. Platforms may be regarded as enabling agents for this process, having become both audio discovery ecosystems and gatekeepers for the format.

Keywords

Podcasting, podcasts, platforms, platformization, mediation.

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1. Introduction

Podcasting appeared in the early 2000's as a new form of on demand listening (Bottomley, 2015; Morris & Patterson, 2015), materializing itself as a unique sphere of content production, distribution and consumption outside pre-existing social media or cloud-based structures. It has since overcome its own conceptual boundaries as audio technology or audio artifact, becoming "both a process and a practice, operating as both a verb and a noun (Berry, 2019, p. 1). Initially, the format was explored and shared by independent creators, with different professionalization profiles, and since about 2010 it has also drawn the interest of legacy mainstream media brands which have found in the ecosystem new ways to develop/explore content and to attract and retain audiences (McClung & Johnson, 2010). More recently, the growing cultural, economic, and technological relevance of podcasting has drawn the attention of new players, in particular platform-based structures based on content streaming, which find in podcasting a new content landscape to explore and to retain user attention.

In the first two decades of the 21st century, the role of sound in the mediation of everyday life has been recentralized, with the occupation of new mediated spaces and renewed social dimensions. Podcasting is a paramount example of such centrality and the of the audio-motivated shift in communication practices in networked structures (Cardoso, 2008, 2023), representing more than content by the changes in the representation listeners, producers and stakeholders have of the media (McQuail & Deuze, 2020) and reflecting the collaborative and participatory culture of Web 2.0 (Benkler, 2006).

Given Spotify's and other platforms' rising interest and investment in podcasts, we aim to explore the content discovery experience and the impact of platformization on a format that has been characterized, from its inception, by an RSS open distribution architecture and that is now being assimilated by platform structures. Therefore, we define two research questions to guide our research:

- RQ1. Considering the portuguese market as a case study, how does the systematization and ranking of podcasts on Spotify impact the perception users have of the format, in its diversity and availability; and
- RQ2. In general terms, does the ranking of podcast content, algorithmic or not, turn platforms into gatekeepers of the format and the wider ecosystem and how may that appropriation impact the perception users have of the format in terms of their preferences?

1.1. *The inception and rise of podcasting*

While the birth of podcasting has been specifically placed around 2005 (Bottomley, 2015), the first experiments with the format date back to 2003, when an embryonic development of the format was presented at user-centered conference BloggerCon, in Harvard (Sterne, Morris, Baker & Freire, 2008; Gallego, 2012). As for the coinage of the term itself, the term podcasting was first used by The Guardian journalist Ben Hammersley in 2004, in a seminal article where he reflected upon the intersection of several key conditions for the appearance of a new instance of audio production and listening, these being the democratization of the MP3 players, namely the iPod, the availability of cheap audio production software and the establishment of weblogging as in intrinsic part of Internet culture (Hammersley, 2004).

Even though its name is an association of the words iPod + broadcast, and it soon became evident that the format would outlive the apple device and the MP3 player (Berry, 2006) by transitioning to personal and always-on devices, such as the smartphone. These highly adaptable features of the format are related both to its technological simplicity and the significantly more complex meaning of podcasts as communicational artifacts, which mix audio, web structures and portable hardware, the key elements for digital communication frameworks in the 21st century (Berry, 2006).

Permanent change is a fundamental aspect of media ecosystems and their inherent economic structures, affecting the production, distribution, and reception spheres (Cardoso,

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2023). The growing digitalization of everyday life, as an underlying element of globalization (Giddens, 1999, 2000; Bauman, 1998), allows for the integration of structures, technology and people (Castells, 1989, 2002) materializing meaningful human relations (Carroza, 2018). The conceptualization of podcasting goes beyond its technological definition, with the related cultural and social practices associated to it being as relevant as the technology in which they're based (Jenkins, 2006).

Dearman and Galloway (2005) characterize the inception of podcasting as a disruptive process, describing a "peripheral technology" that bypasses traditional broadcasting structures to distribute audio content while Crofts, Fox, Retsema and Williams (2005) refer to the rising of podcasts as a transitional process under which traditional radio broadcasting evolves into an on-demand, personalized media sphere, overcoming the limitations of linear broadcasting and allowing users to define their own "media diets" (Cordeiro & Paulo, 2014). Aside from the relationship podcasting maintains with traditional radio broadcasting, which in some ways may be regarded as paternalistic (Llinares, Fox & Berry, 2018), it also inherits much of the social meaning and significance of oral communication, a secondary orality intrinsically linked to the development of electronic communication in the 1980's (Ong, 1982). For these reasons, the genetics of podcasting imply both a departure from traditional audio distribution structures and the retention of some of its symbolic characteristics (Meserko, 2014; Geiger & Lampinen, 2014).

Regardless of the evolutionary or revolutionary factors that contextualize the inception of podcasting, the format is often seen as an alternative cultural model of broadcasting (Sterne *et al.*, 2008) which "created a unique and uniquely valuable space of public discourse" (Aufderheide, Lieberman, Alkhallouf & Ugboma, 2020, p. 1697) by merging unique social spheres such as news, entertainment as well as the educational of medical fields (Campbell, 2005; Zanussi, Paget, Tworek & McLaughlin, 2011).

For these reasons, the cultural impact of podcasting has both defined previous industry structures and helped create structures of its own (McHugh, 2020). In 2014 this cultural impact became even more evident with the release of "Serial," which is often defined as the landmark that launched the "Golden Age of Podcasting" (Berry, 2015), a "seismic cultural shift that introduced millions to the podcast format" (McHugh, 2020, p. 7). The sedimentation of a meaningful technological and cultural framework for producers and consumers created the foundations for the growth of a very desirable demographic, driven by a wide range of motivations, from the desire for entertainment, news, time shifting or the simple need to stay updated on what is relevant, group-narrative wise, on social media. This highly connected aspect podcast consumers is today as central today as it was when podcasting first came to be, with podcast users and producers being particular active networkers on platforms such as Facebook or MySpace (McClung & Johnson, 2010). Departing from Berry's contribution (2006), Bonini (2015) builds on the economic relevance of podcasting, arguing for the inclusion of economic variables in the study and interpretation of the format as a massified and commercially relevant set of production and consumption practices.

This relevance is intrinsically related to the pre-industrial structures of podcasting, which allowed independent (and often amateur) producers to create content outside traditional industry frameworks, creating both new genres and niches, such as "true crime" podcasts (Berry, 2015) and new structures for audiences to relate to audio –a phenomenon that is often described as a "second age of podcasting" (Bonini, 2015).

1.2. *Understanding the platformization of podcasts*

The acceleration and growth of the format was made possible mostly due to the widespread usage of smartphones, the inception of new and alternative funding systems (such as micropatronage/crowdfunding) and the development of audio related networks (preceding Facebook and Twitter) (Bonini, 2015), a group of factors which atomized a potentially connected and highly literate audience.

Connectivity and digital sociability are central concepts to understand the format's rise and the subsequent interest of platforms. Podcasting rose in the context of a "group of Internet-based applications that build on the ideological and technological foundations of Web 2.0 and that allow the creation and exchange of user-generated content" (Kaplan & Haenlein, 2010, p. 61; Kaplan, 2015, p. 197).

The acceleration of connectivity materialized the establishment of platforms and subsequent digital business models based on the collection and analysis of consumer habits and preferences, with data ownership and monetization becoming central do contemporary media distribution. Platforms are "a programmable architecture designed to organize interactions between users" (van Dijck, Poell & de Waal, 2018, p. 9) representing more than structures for people to interact in, as they actively determine and shape social structures and practices on the connected digital world (Gehl, 2011). As ubiquitous actors in the mediated world and active agents in everyday mediation, platforms are ever changing, shaping themselves according to content and user data which is permanently being collected (Driscoll, 2012; Mayer-Schönberger & Cukier, 2013; Turow, 2012; van Dijck, 2014).

In parallel to ubiquity, the vast knowledge platforms own on both content and user data also allows for an almost omniscient status in the digital economy and value chain which has disrupted previous business and distribution models, as platforms and platform-mindset initiatives have realized that contemporary value-chains rely not only on technological innovation but also on how business models and strategies apply to digitalization structures (Lawson-Borders, 2010). This evolution is notable in the news business, where news aggregators such as Google News, Apple News, Yahoo News or web-based application-based feed readers such as Feedly, Flipboard and Digg allow for users to directly aggregate RSS feeds from various outlets, shaping their own experience and legitimizing new intermediation stakeholders.

Whether it is "online newspapers, blogs, podcasts or video blogs (vlogs)" (van Dijck, Poell & de Waal, 2018), these structures allow users to "unbundle" their experience in one place and "rebundle" it in a platform-controlled environment. The "unbundling/rebundling" process has dramatically shifted power dynamics in favor of platforms as "control over news selection is further shifting from news organizations to platforms" (van Dijck *et al.*, 2018, p. 52). The establishment of platforms as effective power spheres emanates from their ability to set rules and practices and to maintain the coordination of power (Castells, 2009) not only of the access to content and monopolization of social practices, but also of their own status in the mediated world via "vertical integration, infrastructuralization and cross-sectorization" (van Dijck, 2021, p. 10).

Power-wise, platformization favors platforms over all other actors, with individual brands having significantly less access to both production and consumption structures, being traditionally reliant on "spaces where multiple interactions occur and multiple conversations among different stakeholders take place" (Iglesias, Ind & Alfaro, 2013, p. 685). As for independent and experimental podcasting projects, they traditionally imply the capacity for adaptation and to solidify successful content at a micro-scale with even legacy media brands turning to podcasting as an experimentation system. While initially the format was regarded as an on-demand ecosystem to distribute traditional broadcast content, brands now focus on the possibility of creating and exploring branded audio ecosystems as the part of a wider strategy. The case of *The New York Times*, with its "The Daily" podcast is a particularly useful example of such dynamic: regardless of the established importance of *The New York Times* as a news brand, "The daily" became a "a very major news platform in ways we had never expected" (Newman & Gallo, 2020), with about 4M downloads a day. Similarly, in *The Guardian*'s case in Britain, the "Today in Focus" podcast has both allowed the brand's audience to grow while also contributing to its diversification:

> In less than a year *The Guardian* has built a bigger audience for its Today in Focus podcast than buys the newspaper. "It's hundreds of thousands every day," says *The Guardian*'s Head of Audio, Christian Bennett, who points out that the podcast attracts younger people who

> are listening to the vast majority of each 25–30-minute episode, with an 80% completion rate: "It's younger than people that buy the paper and it's younger than people that come to our website as well. It's opening up a new audience as opposed to cannibalizing" (Newman & Gallo, 2020, p. 23).

The assimilation of podcasting by platforms implies new challenges to a rather decentralized production distribution and consumption sphere which was fostered by both independent producers/structures and brands, artists, and non-professional stakeholders (Bonini, 2015). The consequences of platformization are particularly noticeable through the homogenization of content production and consumption structures. Hughes and Lang (2003) alerted to the permeability of the music industry to the concentration of "power and wealth in just a few conglomerates that simultaneously compete and collaborate," with remarkable leverage over artists and consumers (Hughes & Lang, 2003, p. 187). However, the accelerated connectivity and sociability allowed by both social media and content distribution platforms, such as Spotify or Netflix, bring positive benefits to creators, users and platforms themselves, the latter relying heavily on third-party content to capture and retain users, keeping them within the limits in which the platforms exert their influence and is able to monetize their habits and behaviors.

Spotify is a product platform, generating revenue by transforming a traditional good into a service and by collecting subscription fees for the access and indexation of these goods (Srnicek, 2016) with data gathering, analysis and monetization at its core: "Platforms appear as an optimal form for extracting data and using them to gain an edge over competitors. Data and the network effects of extracting them have enabled the company to establish dominance" (Srnicek, 2016, p. 84). Being grounded on data extraction to exert network dominance, platforms like Spotify are prone to a set of predetermined evolutionary tendencies, such as "expansion of extraction, positioning as a gatekeeper, convergence of markets, and enclosure of ecosystems" (Srnicek, 2016, p. 117), which go on to become structural to economic digital systems.

The concept of platformization, and possible standardization, is particularly relevant when applied to podcasting, as this ecosystem has historically relied on a huge diversity of creation systems and propositions, parallel to the openness of content, as digital evolution may become disruptive when crystalized into a single set of homogenizing frameworks, norms and practices that threat the ecosystem, compromising competition (Muthuraman, 2020)

The establishment and institutionalization of platforms, in the form of a platformization of contemporary mediation processes replaces a previously two-sided market framework, unilaterally determined by platforms. Producers, either independent or branded, and consumers must then adapt to changes in governance over which they have little control of, around structures they cannot afford to stay away from in order to reach audiences (Nieborg & Poell, 2018).

> As cultural producers are transformed into platform complementors, they are incentivized to change a predominantly linear production process into one in which content is contingent, modularized, constantly altered, and optimized for platform monetization. This results in the rise of the contingent cultural commodity, which further destabilizes the neat separation between the modalities of production, circulation, and monetization (Nieborg & Poell, 2018, p. 23).

Platforms disrupt the logic of existing media distribution models, podcasting included, at two different levels: a) by threatening "the growing advertising revenue that fuels public podcasting's most interesting (and expensive) new productions, and [by challenging] the ability of a public podcasting sphere to maintain itself" (Aufderheide *et al.*, 2020, p. 1697); and b) by challenging the format's collaborative frameworks, by migrating content from open distribution RSS feeds to platform environments reliant on user data gathering (Aufderheide *et al.*, 2020). It should be noted, however, that parallel content discovery systems and interaction frameworks have always supported podcasting and provided it with both social and cultural meaning as an audio mediation tool, back to the first decade of the 21st century, when Facebook and MySpace started monetizing sociability. Perks and Tollison (2019) highlight the importance of this "social engagement" as an indissociable dimension of the podcasting phenomenon, describing the vital role of social media in connecting niche listeners and fan communities. Without this social and connected aspect, podcast listening would otherwise be a solitary experience, deprived of social meaning, as podcast usage is not an individual experience, but rather a form of connection to spaces and people –defined on the listeners own terms in the form of an immersive and personal experience (Perks & Tollison, 2019). Mou and Lin (2015) corroborate, arguing that podcast listening is built on a significant "social dimension through interpersonal discourse," contrary to what appears to be a solitary and individual experience.

Considering that the distinctive aspects of podcasting relate to the way podcasts are produced, distributed and consumed (Berry, 2019) and that the format has allowed listeners produce and consume radio on their own terms (Markman, 2011) within the influence of a collaborative and participatory culture (Markman, 2011; Markman & Sawyer, 2014), in this article we explore the way a specific platform, Spotify, ranks and presents podcast programs to users.

In May 2020, Spotify announced a licensing agreement to host The Joe Rogan Experience podcast exclusively, in a deal that could reach as much as $200 million (Rosman, Sisario, Isaac & Satariano, 2022). The year before, the streaming platform committed to make podcasts part of its core business by acquiring podcast networks Gimlet and Anchor for about $340 million (Russell, 2019). These acquisitions were part of a two-side strategy focused on attracting both listeners and creators alike, by provision of exclusive and popular content to consumers and production/distribution mechanisms to producers. The purchase of Anchor is particularly relevant, as the production platform is linked to a substantial democratization of the access to podcasting technology: "There has been an exponential growth in the introduction of new podcasts [...], and much of that can be attributed to the success of Anchor in lowering the entry barrier to podcast production" (Sullivan, 2019, p. 5).

However, and despite the consolidation of podcast audiences on several global markets (Newman *et al.*, 2023) the business side of podcasting has become a significant challenge in terms of its monetization, either for media brands or platforms. In 2024, four years after Spotify came public with its strategy for the format's platformization, there are still concerns on the potential of podcasting in terms of return on investment within the industry and despite investor optimism (Shapiro, 2024). 2024 is expected to become the first year in which the podcasting side of Spotify's business becomes profitable, after considerable changes to the platform's original strategy, which implied significant internal restructuring as well as reduction in the number of jobs (Holpuch, 2023) and the end of Gimlet and Parcast which would become part of Spotify Studios s after being acquired for $230 and $56 million, respectively (Sawers, 2019).

2. Methodology

The growth of podcasting and podcasts, described in the introductory section of this article, has had recent confirmation from several sources. In 2022, according to global data from the Digital News Report (Newman *et al.*, 2022), 34% of interviewees around the world listened to a podcast in the last month and format has even larger expression in countries such as Ireland (46%, +5 percentage points from 2021), Sweden (44%, +7pp. from 2021), Norway (42%, +5pp. from 2021) and Spain (41%, +3pp. from 2021). Digital News Report Portugal data from 2021 (Cardoso, Paisana & Pinto-Martinho, 2021) indicates that 42% of Portuguese internet users listened to a podcast in the month before, making Portugal one the countries where the format has larger reach among all 46 Digital News Report sampled countries while also being one the national samples where podcasting has grown the most: in 2019, it had a 34% reach and in 2020 the proportion stood at 38%. The growth of podcasting in Portugal is being mostly driven by younger audiences (among the 18-24's, 72% listened to a podcast in the previous month) and Spotify is the second most used platform to access the format (24%), the first being YouTube (41%) These two platforms also skew considerably younger than Apple Podcasts in Portugal, for instance: Spotify is used by 37% of 18-24 users and YouTube by 40% while Apple reaches only 11% of this younger audience (Newman *et al.*, 2021).

To analyze the ranking of podcast programs on Spotify we gathered data from the "Top podcasts" page on the platform over the course of 32 days, from March 7th, 2022, to April 7th, 2022. The Top Podcasts page can be accessed by clicking "Search" on the left-hand side navigation bar on the platform, selecting "Podcasts" under the "Browse all" section and finally by clicking the "Top Podcasts" link button under Podcast Categories.

In preparation for data collection, it was observed that this ranking, which can be consulted by all users (free or paying) logging in from Portugal or in any country, changes throughout the day. To mitigate inconsistencies and secure reliability, data gathering was done daily, between 9am and 10am. Podcast programs were categorized according to title; position in ranking (1st to 50th), country of origin, publisher, publisher by origin (independent, legacy media brand such as news brands, podcast production company, etc.), genre (determined by thematic field) and publishing frequency. Over the course of 32 days, we identified and gathered data on 102 different podcasts.

As described by Spotify, the presence of podcast programs in the "Top podcasts" page is determined by a combination of the number of followers and the number of recent followers.[1] However, Spotify does not specify the weight of each factor in determining how a given program ranks and this method aims to suggest users content that is usually preferred (# of followers) alongside other content that may be trending (# of *recent* followers). It should be noted that while the Spotify homepage (the first page a user sees upon logging in) is algorithmically determined to present the user with content that suits their personal preferences and habits, the "Top podcasts" page is the same for all users in each country. Over the course of the data gathering period this was tested by logging in to Spotify at the same time using different accounts and screenshotting the Top 50 to check for differences in the rankings, among different users. The choice of Spotify over other platforms such as Apple Podcasts, Google Podcasts or YouTube relates to the fact that this particular platform, as an exclusively audio streaming service has made significant efforts to place podcasts at the core of its business, offering users with content and podcast producers with well-known tools (which it obtained via acquisition, such as Gimlet). Regardless of the reach of other platforms, Spotify's business strategy towards podcasting makes it a differentiated player for the purpose of this case study.

While it has been shown that this method allows for the gathering and analysis of consistent data on the ranking of podcast programs, we identify two possible factors that may impact data quality: a) the time period chosen for data gathering may overestimate the weight certain genres have in their overall ranking throughout the day, namely news podcasts programs, with daily episodes being released in or around the time frame at which we gathered our data (early morning) and b) as the "Top podcasts" ranking page is algorithmically defined for the whole national user community it is possible that, as a gateway-to-content tool, it is not as relevant as the Spotify homepage each user sees upon logging in –which is personalized per user. This happens for two reasons: a) availability –homepage is immediately shown and is more visible, while the "Top Podcasts" ranking must be actively consulted by users looking for specific content–; and b) "Top podcasts" ranking presents users with podcast programs, exclusively, while the homepage may or may not suggest the user podcasts –only if the algorithm determines that podcast programs will be of interest to the user and will generate engagement. For this reason, it should be noted that Podcast Charts may operate both as reinforcement loops (i.e., popular programs will be selected because of their popularity) or discovery systems as the algorithm does not only suggest historically popular content, but also programs which have gained traction recently.

As this is an exploratory study, results are presented using descriptive analysis in order to identify general patterns and trends. To better understand the typology of content identified using the method described above, we divide the analysis of podcast programs into two separate

[1] Spotify, 5 Fast Facts About Spotify's New Podcast Charts

samples: the overall sample of podcasts which appeared in the Top50 of the Top Podcasts list and a sub-sample of the programs that made it to any of the Top10 places in the same ranking. The definition of these two analytical units allowed us to spot differences in the success of the content based on the variables in which it is characterized, since the presence of a podcast in the top 10 indicates a better performance (in terms of total followers and/or follower growth) than a presence in the top 50.

3. Results

102 different podcast programs were identified over the 32 days of data gathering in the Top50, while 25 different podcasts were displayed to users in the Top10, meaning 24,5% of identified programs made it to the top 10 places of the ranking (see Table 1).

Most of the identified podcasts originate in Portugal –80,4% (82) of podcasts in the Top50 (82) and 84,0% (21) of programs in the Top10. Only three other countries were signaled in the gathered dataset: 10,8% of podcasts in the Top50 originate in the U.S.A, 4,9% in the UK and 3,9% in Brazil. Podcasts in the Top10 follow a similar distribution to what is seen in the Top50, with U.S.A.-based content having slightly higher prevalence in the wider ranking, in proportion, and Portuguese content having more weight in the Top10 ranking (84,0% compared to 80,4%). English-spoken shows such as "The Joe Rogan Experience," "Conan O'Brien needs a Friend" or "The Jordan B. Peterson Podcast" are recurring in the Top50, hinting that celebrity or social media related content drives demand for foreign programs.

Out of 102 podcasts, 46,1% (47) are from independent producers while 55 (53,9%) are branded or directly associated to brands. Programs identified in the Top10 during the period in analysis follow a similar distribution, with 44,0% being independent and 56,0% branded podcasts. The relative balance between independent and branded content as a staple of the format has been identified before as an inherent characteristic of the format (McClung & Johnson, 2010).

Table 1. Characterization of podcast programs identified in the Top50 and Top10 rankings of the Spotify "Top Podcasts" tool in Portugal, March 7th to April 7th, 2022.

	Top 50		Top 10	
	n	%	n	%
Total Podcasts	***102***	***100%***	***25***	***100%***
By Country				
Portugal	82	80,4%	21	84,0%
U.S.A.	11	10,8%	2	8,0%
UK	5	4,9%	1	4,0%
Brazil	4	3,9%	1	4,0%
By Publisher typology				
Independent	47	46,1%	11	44,0%
Branded	55	53,9%	14	56,0%
Legacy media brands (national TV, Radio, Print or digital born news/entertainment brands)	38	69,1%	9	64,3%
Other brands	17	30,9%	5	35,7%
By Publishing frequency				
Daily (everyday)	5	4,9%	0	0,0%
Daily (Mon. to Fri)	13	12,7%	4	16,0%
Weekly	67	65,7%	19	76,0%
Every two weeks	10	9,8%	---	---

Monthly	3	2,9%	---	---
Seasonal	1	1,0%	1	4,0%
N/A	3	2,9%	1	4,0%
By Exclusivity to Spotify				
Yes	4	3,9%	1	4,0%
No	98	96,1%	24	96,0%
By Genre				
Society/Culture	28	27,5%	7	28,0%
Comedy	26	25,5%	7	28,0%
Sports	8	7,8%	4	16,0%
News/journalism	7	6,9%	1	4,0%
Politics	8	7,8%	1	4,0%
Advice and self-help (inc. wellness)	6	5,9%	---	---
Economy and finance	5	4,9%	2	8,0%
Health (incl. psychology)	4	3,9%	1	4,0%
Celebrities	2	2,0%	---	---
Educational	2	2,0%	---	---
History	2	2,0%	1	4,0%
Fiction (Audiodrama)	1	1,0%	1	4,0%
Lifestyle	1	1,0%	---	---
Religion	1	1,0%	---	---
True crime	1	1,0%	---	---

Note: Spotify Top Podcasts Portugal. Base: Top50=102 podcasts (all podcasts that ranked on any of the first 50 places the Spotify Top Podcasts tool in Portugal between March 7th and April 7th); Top10=25 podcasts (all podcasts that ranked on any of the first 10 places the Spotify Top Podcasts tool in Portugal between March 7th and April 7th). Note: this analysis focus on podcasts, not on single episodes.

Source: Own elaboration.

Approaching the branded content as an independent sub-sample, almost 70% (38) of branded podcast in the Top50 are produced by legacy media brands in the Portuguese media ecosystem (national TV, radio print/digital or digital-born/entertainment brands) with only 17 programs coming from other brands (these include programs made by podcast production companies, sports clubs, online betting, private foundations, among others).

While podcasting has been defined as a derivation of traditional radio broadcasting and as a new on-demand structure which allows for the distribution of linear content (Crofts, Fox, Retsema & Williams, 2005), a closer look at the 38 programs originating in legacy media brands in the Spotify Top50 shows that 36,8% are from legacy radio brands and 34,2% (13) from television brands, evidence that the format constitutes a meaningful form of mediation for television and radio programs alike, even if at the sacrifice of the visual dimension of television. This is more evident in the specific case of the Top10 of the Spotify Top Podcasts list in Portugal, branded podcasts originating in legacy television brands are even more prevalent, representing 44,4% of identified programs that made it to any of the top 10 places. It should be noted that podcasting is regarded by the majority of radio outlets as a secondary distribution channel to broadcast content, and not as a primary or exclusive structure with which unique content may be distributed.

In terms of publishing frequency, most programs in the Top50 follows a weekly release logic (65,7%-67 podcasts) with daily podcasts released on weekdays being the second most frequent category with much lower expression (12,7%, 13 podcasts). In the Top10 ranking, weekly podcasts represent 76% of all identified programs (19) and daily, weekday, podcasts representing 16% of this subsample. Podcast published every two weeks, monthly, or seasonally tend to appear in the Top50 and Top10 with less frequency although it should be noted that in the case of the low proportion of seasonal podcasts, this may be due to the chosen period of analysis.

Exclusive podcasts, available on Spotify, such as the Joe Rogan Experience, which appeared in the Portuguese Top50 in all 32 days of data collection, have little weight in the most successful podcasts in Portugal, according to this ranking: only 4 Spotify-exclusive podcasts were identified in the Top50 (3,9% of all 102 podcasts) and 1 in the Top10 (representing 4,0% of all 25 podcasts). It should be noted, as mentioned above, that there is a huge prevalence of Portuguese spoken podcasts in the sample, originating in Portugal, and among the small subsample of Spotify-exclusive content, 1 podcast is produced in the U.S.A. and 3 originate in Brazil, and are spoken in Brazilian Portuguese. Furthermore, it should be mentioned that it is not possible to determine whether the algorithm inorganically promotes exclusive-to-Spotify content as a way to benefit content produced or supported by the platform.

Genre-wise, sample analysis determined a considerable prevalence of Society/Culture (27,5%) and Comedy podcasts (25,5%), which combined represent more than half (52,9%) of all podcasts identified in the Top50. In the Top10, these two genres total 56,0% of all content. The second most frequent genres are Sports and Politics podcasts, both weighing 7,8% of the total sample in the Top50. News and Journalism programs are 6,9% of the total overall sample. In the Top 10, Sports podcast programs represent 16,0% of all identified podcasts. Niche genres such as True Crime podcasts, which the format considerable reach and dimension (Berry 2015, Bonini 2015) have little expression the sample in analysis, with only 1 podcast being identified as having reached the Top50 in the analysis time frame.

4. Discussion

In recent years the success of podcasting, driven by a wide range of cultural, technological, economic, and social factors, has drawn the interest of platforms and advertisers alike. In this paper we aimed to explore two different aspects of the way Spotify promotes the discovery of podcasting content in its platform by looking the way the rankings are systemized and consequent impact on content diversity/availability in the specific case of the Portuguese market (RQ1) while also trying to determine whether these ranking systems may or may not transform a platform into format/ecosystem gatekeepers and influence consumer preferences, regardless of market/country (RQ2).

Answering RQ1, the chosen methods and subsequent descriptive analysis tend to suggest a slight harmonization of content typology. What implications does this have for the influence of ranking systems on the diversity and availability of content?

a) Most content is national, originating in Portugal. Spotify's ranking system appears to prioritize local, Portuguese content for users in Portugal. This could be due to a variety of factors, including algorithmic preferences for local content, user preferences for content in their native language, or a combination of both. This localization can enhance the relevance of the content for Portuguese users, potentially increasing user engagement and satisfaction. The prevalence of national content suggests that Spotify's ranking system may be providing a platform for Portuguese creators to reach their local audience. This can contribute to a diverse podcast ecosystem by promoting a variety of voices and perspectives within the country.

b) There is a rather balanced landscape of independent content and brand originated content, the latter being dominated by legacy media brands. The fact that independent content can coexist and compete with content from established media brands on the platform suggests that Spotify's ranking system does not inherently disadvantage independent creators. This could potentially encourage a more diverse range of content creators to use the platform, allowing for a broader range of voices and perspectives to be heard, thereby increasing the diversity and availability of content for users. On the other hand, the dominance of legacy media brands among the brand originated content suggests that these established brands may have an advantage in terms of visibility and audience reach on the platform (due to existing audience base, production resources, or marketing strategies), which, as seen, does not necessarily limit the diversity or availability of content on the platform.

c) Podcast usage is likely a potential weekly habit based on the periodicity of higher-ranking shows: this suggests that Spotify's ranking system may be influencing the frequency and timing of podcast consumption in the Portuguese market. The ranking system, which tends to favor popular and frequently updated shows, may be encouraging users to engage with these podcasts on a weekly basis. This could be because higher-ranking shows follow a weekly release schedule, leading users to develop a habit of tuning in each week to catch the latest episode. This could have implications for content diversity and availability. If users are primarily engaging with higher-ranking shows on a weekly basis, they may be less likely to explore other, potentially less popular, or less frequently updated content. This could result in a less diverse listening experience for these users. However, it could also mean that content creators who are able to maintain a consistent, weekly release schedule may have a better chance of gaining visibility and listenership on the platform.

d) There is low penetration of Spotify exclusive content. This suggests that Spotify's ranking system does not heavily favor its own exclusive content. This could mean that the platform is providing a relatively level playing field for all content creators, regardless of whether their content is exclusive to Spotify or not. Furthermore, this could reflect the preferences of the Portuguese users who might be more interested in a broader range of content rather than just Spotify exclusives. In terms of content diversity and availability, this could indicate a wider variety of content for users to choose from, as they are not primarily being directed towards Spotify's exclusive content.

e) Overwhelming popularity of general and comedy content, suggesting Spotify users in the country tend to use the format for entertainment purposes. This suggests that the platform's ranking system may be favoring these genres, possibly due to their broad appeal and entertainment value. This could indicate that Spotify's ranking system is responsive to user preferences and listening habits, promoting content that is popular and widely consumed. However, this could also potentially limit content diversity and availability in the sense that other genres or types of content may not receive as much visibility or promotion, particularly if they do not fall within these popular categories. This could impact the diversity of content that users are exposed to and their ability to discover new or different types of content.

Reflecting upon RQ2, regarding the format ecosystem gatekeeping aspect, not only in Portugal, but globally, the following points discuss the operational mechanisms through which Spotify exercises control over the podcasting ecosystem:

a) Location-based algorithmic system: The primary way that Spotify's ranking system appears to use to prioritize content is origin in the country of the listener. This could be due to algorithmic preferences for local content, user preferences for content in their native language, or a combination of both. This localization can enhance the relevance of the content for users, potentially increasing user engagement and satisfaction.

b) Popularity-based collective algorithmic indexation system: Additionally, Spotify employs a popularity-based collective algorithmic indexation system. This system ensures that popular content is easily discoverable, thereby influencing the accessibility of the format. The presentation of a wide variety of popular content can shape users' perceptions of the podcasting format.

c) Personalized algorithmic discovery-based system: One of the ways Spotify exerts control over the podcasting ecosystem is through its personalized algorithmic discovery-based system. This system analyzes users' past listening habits and recommends content that aligns with their preferences. By consistently exposing users to content that reinforces their existing preferences, this system can shape their preferences over time.

Spotify's two-dimensional approach, described above, suggests that the status of podcasting within the platform is one of complementation with the wider platform boundaries and content, i.e., the platform as a discovery system not just for music or podcasting but for audio-mediated

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content –podcasts being, therefore, a part of an attention seeking, and retention offer. More generally, the use of ranking systems for podcast content, whether implemented through algorithmic means or otherwise, has the potential to position platforms as gatekeepers within the podcast format and its wider ecosystem. This is because a platform's ranking system can exert a significant influence on the discoverability of particular podcasts, thereby determining which podcasts will likely experience greater audience engagement, and conversely, which podcasts may struggle to gain listenership. The results of the Portuguese case suggests that Spotify's ranking system is balanced and new or independent creators can attain visibility and cultivate their audience, thereby potentially resulting in a more diverse podcast ecosystem and determining the actionable preferences of users.

This analysis also suggests that platforms tend to position themselves as institutional classifiers, contributing to a new institutionalization of gatekeeping, under an algorithmic dimension. Simultaneously, such gatekeeping, under the networked communication model (Cardoso, 2008; 2023), differs from the dynamics present under more traditional gatekeeping approaches, such as the ones that characterized mass communication. Traditional gatekeeping meant that publishers were associated with a unidimensional approach to gatekeeping –record companies dealt with music, book publishers with books, game distributors with games, newspaper publishers with news, cinema distribution with movies, etc. Platforms, such as Spotify, seem to relate more to the gatekeeping approach of radio and television in networked mass communication models, given that the platform uses its position, already established as music distribution, to position themselves as podcast gatekeepers, contributing to the establishment of an algorithmic gatekeeping approach not to a specific format, but for audio. Furthermore, Spotify's archiving and indexing are an illusion of ubiquity and perpetuity because catalogs are unstable by nature and secured by licensing, which may or may not be secured in the future (Crisp, 2021).

In the introductory chapter we discussed a diverse and wide range of theoretical approaches to platform studies and theory, which are often impacted by either positive or negative aspects of platform-based structures in the digital economy. Regardless of the power dynamics associated to such structures, which are of paramount importance to the discussion, platforms present opportunity, access, and knowledge about audiences to producers, and content to audiences. As for the wider impact of platform indexation and presentation of podcast content, these dynamics do affect the way consumers perceive and navigate the format, but even if not platform-based, these discovery systems have been a part of podcasting in the past, and in such an expressive manner that the success of Serial in 2014, and the subsequent rise of True Crime as a format (Sherrill, 2020) kickstarted a "second age" in podcasting (Bonini, 2015). There were always discovery systems associated to podcasting, even if these systems were themselves the expression of an alternate, niche system of social, cultural, and technological practices. In this matter, the interest of platforms, while possibly impacting the format's future, may also promote a growth in scale, both of production and consumption.

Podcasting helps create communities around content, more than audiences. The discussion around the format and specific programs is as meaningful as the ability to generate audiences which may in turn help producers, independent and branded alike, solve a central issue of contemporary mediation: it is as important to engage consumers and listeners and retain their attention through engaging content as it is to attract and mobilize new consumers/listeners.

In this contribution we resorted to a specific methodology and object, representing a small fraction of the conceptual digital ecosystem we discuss and in which we frame podcasting and platforms. As both limitations to this approach and suggestions for future research, ranking analysis of multiple platforms (such as YouTube, Apple podcasts and Google podcasts) may offer a more diverse view of the platformization of podcasting, as a phenomenon. From the methodological point of view, a randomization of data gathering periods throughout the day will help identify different trends and more comprehensive statistical analysis procedures will

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undoubtfully lead to further conclusive data. It should be noted that this approach to the evolution of the format is indeed platform-centered and market deterministic, an issue which must be addressed in future research by approaching the subject through a consumer centered lens to diversify the frameworks under which we study discovery and consumption practices.

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