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The video podcast on Spotify Spain. A format for generation Z creating a trend in the digital audio industry

El video podcast en Spotify España. Un formato dirigido a la generación Z que marca tendencia en la industria del audio digital

Abstract

Since 2020, podcasts in video format have increasingly gained presence on audiovisual platforms. This article is a study of the characteristics of video podcasts played on Spotify in Spain, the leading platform for digital audio consumption. The aim was to carry out an analysis of these formats aimed at Generation Z to confirm their distinguishing features with the inclusion of video and its influence on users. A mixed, quantitative-qualitative methodology was used, with a content analysis of a sample of 48 pieces and an open interview with Communications managers of this platform in Spain. Our research confirmed that the inclusion of audiovisual elements favours the creation of a community, the insertion of advertising through sponsorship or product placement and the promotion of new content-creators. In addition, information was obtained on the behaviour of the target to which these productions are directed and the possibilities of interface and marketing channels of these spaces. The data reflect an audience growth in the year these productions are played on this platform, confirming that the video podcast is popular with Generation Z and sets trends among the creators and consumers of digital audio.

Resumen

Desde el año 2020 los pódcast en formato vídeo han ganado presencia en las plataformas audiovisuales. El presente artículo es un estudio sobre las características del video podcast en Spotify en España, la plataforma líder en consumo de audio digital. El objetivo es analizar estos formatos dirigidos a la Generación Z para comprobar sus rasgos diferenciales con la inclusión del vídeo y su influencia en los usuarios. Se ha empleado una metodología mixta, cuantitativa-cualitativa, con un análisis de contenido de una muestra de 48 piezas y una entrevista abierta a responsables de comunicación de la plataforma en España. Fruto de la investigación se constata que la inclusión de elementos audiovisuales favorece la creación de comunidad, la inserción de publicidad mediante el patrocinio o el product placement y la promoción de nuevos creadores de contenido. Además, se ha obtenido información sobre el comportamiento del target al que se dirigen estas producciones, las posibilidades de la interfaz y las vías de comercialización de estos espacios. Se confirma que el video podcast encaja con la Generación Z y marca tendencia entre los creadores y consumidores del audio digital con los datos de incremento de audiencia durante el año de vigencia de estas producciones en la plataforma.

1. Introduction

The online audio industry in Spain is going through a period of astonishing growth as is demonstrated by the launch of "*Espacio Audio*", a Spanish government project to stimulate, revitalise and globalise the entire audio sector in Spanish and the co-official languages, with the incorporation of podcasts, music, audiobooks and other creative audio industries (Government of Spain, 2023). This is a programme within the framework of the Strategic Project (PERTE) of the New Language Economy with an investment forecast of 160 million from the Recovery Plan (Addendum) that was requested from the European Commission in June 2023.

The production of podcasts as professional content has grown considerably over the last ten years on a global scale. The Podcast Consumer (Edison Research, 2023) reveals that 64% of Americans listen to podcasts regularly and notes how Generation Z starts consuming podcasts at a very young age, with 57% in their teens, 73% at age 18 and a total of 75% listen to them on a weekly basis, according to analysis conducted in April 2023. In Spain, quality content and the concept of a cultural industry has been commonly recognised since 2016, when platforms such as Podium Podcast were born and professional content began to be produced. Sánchez Serrano (2016) considers the podcast to be an appendix to radio, but with its own entity and with certain advantages that provide an extra benefit to the listener. Orrantia (2020) states that new generations consider podcasting to be "their own radio", as they have not regularly consumed conventional radio. On the other hand, according to the author, the narrative is different because what is heard is audio and not radio, and none of the elements involved are improvised (Orrantia, 2020: 193). Furthermore, the podcast is presented as a much more cost-effective alternative to traditional radio.

The rise of podcasting and digital sound comes with the application of 2.0 and 3.0 technologies, at a time when the listener has the possibility to participate in the generation of content in a diverse and accessible way. This was helped by the launch of the iPhone in 2007, which paralleled the expansion of wireless networks and the transformation of audio content (Piñeiro-Otero, Terol-Bolinches and Talleda, 2019). Videla-Rodríguez and Piñeiro-Otero (2013: 85) consider the consumer of this format as "a prosumer, an active user who not only accesses and consumes content but also produces and disseminates it". With the incorporation of streaming, Cavia (2016) defines the term "radiovision", radio that can be seen and heard and whose programmes can be shared on social networks or through its own YouTube channel. The majority use this formula to attract new listeners, and it is incorporated into podcast platforms such as Podimo and Spotify, the subject of this article.

In the process of transformation and evolution of podcasting, research such as that of MARU/Matchbox, commissioned by Cumulus Media and Signal Hill in spring 2023 (González, 2023) stands out, showing us the increasingly predominant role of platforms initially created to generate audiovisual content such as YouTube. It provides interesting data such as the fact that, in the last four years, YouTube has become the most widely used podcast listening platform, doubling its percentage of weekly consumers for this reason; users who watch and listen to podcasts.

According to the report by the Interactive Advertising Bureau Spain (IAB Spain, 2023), podcasting is the third most-listened-to digital audio format in 2023, behind digital music and live online radio, with more than half of all users listening to it. This study detects that the trend of video podcast consumption is growing, with 32% of the audience preferring this format and, of this percentage, nearly 60% are young people between 25 and 34 years old. Video is part of the culture of digital natives and the evolution of podcasting is leading to increasingly visual experiences. This is the case of formats used by fashion influencers such as Laura Escanes (*Pedacito de Cielo*) or content creators such as Ibai Llanos (*Charlando Tranquilamente*), who opt for the use of video podcasts.

In terms of content, the most interesting are humour, entertainment, music, film and television, culture and society, and history. Its serialised formula, on-demand consumption, subscription-based format, asynchronous interaction and multiple distribution channels, among other reasons, are factors that contribute to the increase in consumption and demand for information, leisure and entertainment in a new context. Sellas and Solà (2019) attribute the success to the properties of podcasting: mobility, narrative fragmentation and platform integration. The periodicity, complexity and narrative variety have managed to generate a format in convergence with other media and in coexistence with social networks that make it possible to make these audio productions known beyond the usual hosting platforms (López Villafranca, 2021).

2. Podcasting platforms

The growth of podcasting gained momentum when National Public Radio's (NPR) programme "Serial" began to gain an audience in 2014. Data on this growth from Edison Research and Triton Digital in 2019, corroborated that more than 50% of American listeners over the age of 12 had listened to a podcast and 32% had done so in the last month (Chan-Olmsted and Wang, 2022: 685). The Digital

News Project report by Newman and Gallo (2019) analyses this evolution in the international market in qualitative terms, noting the professionalisation of podcasting, which brings more money into the industry and raises the bar in terms of quality, making audiences more receptive to consuming paid subscription content. According to García Marín (2019: 182), the evolution of podcasting as an industry in Spain starts with radio and ends with podcasting, since its consumption initially takes place on Internet radio, with on-demand content on various devices. According to Moreno, Amoedo and Martínez-Costa (2017), the main objective of the strategy of large radio media groups on online platforms is to use various techniques to retain traditional audiences and to attract users who are increasingly using the Internet to consume other media through different platforms. The relationship between radio and podcasting in its early stages is evident, but the platforms are indispensable tools for the consolidation and proliferation of these new audio formats in the market until monetisation is achieved. Far from an innocent conception of the platformisation of podcasting, Sullivan (2019: 3) highlights how the infrastructure of cultural production has evolved through algorithm-driven practices, data structures, development software and application programming, among other things. This process of platform development has intensified in recent years. It was in 2012, with the launch of the first business models in the United States, that podcasting began a second era, which has transformed it into a productive commercial practice and a means of mass consumption (Bonini, 2015: 23).

Apple Podcast was a pioneering audio streaming service and media player application developed by Apple Inc. to play podcasts. It began supporting podcasts with iTunes in June 2005, but launched its mobile app in 2012. SoundCloud, created in Sweden in 2007 by Alex Ljung and Eric Wahlforss, was one of the first platforms. Initially conceived as a social network for musicians, it has evolved over time into a podcasting platform similar to the rest of the market, reaching a total of 200 million users in 2019 (Parra Valcarce and Onieva Mallero, 2020: 16). The podcasting platform was globally concentrated in Apple's iTunes portal, "which gradually caught the attention of audio kiosks such as iVoox, the most recent repositories of Himalaya and Google Podcast, or the unexpected investment of Spotify, which is now focused on this format" (Pérez-Alaejos, Terol-Bolinches and Barrios Rubio, 2022: 5). Other European platforms that have successfully entered the Spanish market include Podimo, Audible, Sybel and, undoubtedly, Spotify, to which the following section is dedicated.

Podimo was founded in Copenhagen in 2019, although it arrived in Spain a year later, in 2020, with 50,000 Spanish-language podcasts under a subscription model. Audible (2020) and Amazon Music (2021) promote the use of smart speakers through the Amazon platform, which offers Prime Video in its entertainment content package; podcasts and audiobooks on Audible; and music and podcasts on Amazon Music. In 2020, Audible also entered the Spanish-language production market with Audible Studios, with a clear objective to be leader in the audiobook market, as well as offering a collection of podcasts and the occasional audioseries. Similarly, the French podcast start-up Sybel landed in Spain in 2020, specialising in next-generation audio content for children and adults, offering an immersive and engaging listening experience for all audiences (Terol, Pedrero-Esteban and Pérez-Alaejos, 2021).

The Spanish-speaking market is led by the iVoox platform, which was launched in 2008, where any user can publish, share and listen to audio for free: from podcasts to radio programmes, audiobooks and other types of audio on the web or on mobile applications (Caballero-Escusol, Nicolas-Sans and Díaz, 2021: 97). Juan Ignacio Solera was the creator of this platform which fulfils a function that goes beyond hosting, becoming the place of reference for the consumption of Spanish-language podcasts, with 25 million listeners per month. This platform is used both by media outlets and independent podcasters, with a paid version called iVoox Plus and with a model very similar to Netflix (Izuzquiza, 2019).

In Spain, the start-up Cuonda and Podium Podcast, the PRISA Group's platform, emerged in 2016. Cuonda's proposal is based on the enhancement of Spanish-language podcasts in Latin America, the United States and Spain by establishing contact with advertisers. One of its founders, Ana Ormaechea, identified problems for content creators in reaching audiences, and a problem for audiences in finding spaces they liked (García-Avilés et al., 2016). The functioning and purpose of the platform, according to Valero-Pastor and González Alba (2018: 556-557), is based on a dual nature: "on the one hand, the creation and gathering of journalistic content that reaches a specific audience and, on the other hand, the connection of advertisers with the podcasts that most interest them according to their brand". For its part, Podium Podcast plays a key role in Spain in the current era of "audification" (Piñeiro-Otero and Pedrero-Esteban, 2022). Specialising in entertainment, fiction and journalism, this platform includes major sound productions, hits from traditional radio and other formats such as the fictional podcast *El gran apagón*, a drama series that obtained more than three million downloads during its first year of broadcasting (López Villafranca, 2021). The latest to join the Spanish-language podcast industry was Sonora in 2022, owned by the Atresmedia group, whose label aims to distinguish itself from the rest by offering "new stories created by great storytellers" (El Confidencial, 2022).

2.1. Spotify and podcasting

Spotify is the world's most popular platform, with more than 500 million users and 200 million subscribers, according to the platform's 2023 first quarter balance sheet (Spotify, 2023). IAB Spain (2023) places it as the platform most associated with digital audio in Spain (54% compared to 38% for YouTube and 23% for applications/web radio). In reference to the question that concerns us in this research, there is a progressive increase in the number of podcast listeners who opt for video (32%) among the core population under 35 years of age, as already noted in the introduction to this research.

The Spotify platform, founded in 2006 in Stockholm by Daniel Ek and Martin Lorentzo, revolutionised the music industry with different versions of its web application and mobile application for tablets and smartphones, providing free access with advertising or a premium format (Jáuregui, 2015). More than a decade later, in 2018, the platform developed its focus on podcasting. Furthermore, in 2019 it acquired two companies dedicated to the creation of podcasts: Gimlet Media, a major international production company with a turnover of over $200 million, and Anchor, which provides podcasters with tools for creating, broadcasting and monetising their programmes (Szalai, 2019). It also acquired the mystery production company Cutler Media and signed popular stars and names such as Joe Rogan, Barack Obama, Prince Harry and Megan Markle or Kim Kardashian for its successful productions (Pascual, 2020). In the struggle to attract increasingly segmented audiences, Spotify has made this policy its hallmark (Piñeiro-Otero and Pedrero-Esteban, 2022) and the original production and training of successful content and creators is a formula repeated by the rest of the audio platforms. In this effort to market its products and reach a wider audience, Spotify is considering distributing Gimlet's productions on other platforms, which were, until now, exclusive to its own catalogue.

In its strategy to facilitate monetisation and advertising investment, in 2020 Spotify launched the Streaming Ad Insertion tool for advertising insertion in the platform's exclusive podcasts, using SAI technology which personalises the content with specific adverts for those listeners who consume that content. A year later, in 2021, the paid subscription platform arrived in the United States and other countries, allowing creators and brands to monetise through "Subscribers only" (Bastero, 2022). In addition to this, the company has created Ad Studio, the company's "self-service" advertising platform, so that advertisers can take advantage of Ad Studio's targeting options to connect with their audience, taking into account other variables such as playlists, podcasts consumed by their users and demographic data, among others. Among the advantages offered to the advertiser is the simplicity of the process, whereby the script is provided by the platform, making it possible to create professional advertisements with voiceover and music within 24 hours, as well as offering metrics to measure results (González, 2020).

The integration of video into Spotify took place in 2020 on a limited number of English-language podcasts with this functionality. In 2022, the video podcast option reached other markets, including Spain, with the inclusion of spaces such as *Nadie sabe nada*, a programme by Andréu Buenafuente and Berto Romero broadcast on Cadena Ser (a Spanish radio network) and produced by El Terrat for HBO Max. It is one of the most listened to programmes on the platform according to Spotify's data. With the expansion of markets, Spotify aims to strengthen its services offered to video podcast consumers by enabling video playback in the background and giving the listener/viewer the active viewing option, where the video can be selected in the foreground, or passive listening, with the video in the background (Calvo, 2022).

3. Objectives and methodology

The main objective of this research is to analyse video podcasts on the Spotify platform targeting a digital native population. Secondly, the aim is to identify and describe the characteristics of these productions that are made to be listened to but can also be watched. The aim is to examine production, distribution and marketing trends in order to test the strengths and weaknesses of this phenomenon on the Spotify platform. The choice of this platform is due to its importance in the international and national market for its leadership in online audio consumption, with more than 4 million listeners daily on average in Spain (Marketing Digital, 2023).

To achieve these objectives, the methodology used was the content analysis of a sample of 48 video podcasts located on the Spotify platform (final date for updating the analysis was May 2023). Content analysis is a technique that uses a mixed quantitative and qualitative approach, which aims to reach conclusions through inductive logic from the interpretation of the data that we collect after viewing the selected sample (Berelson, 1952; Bardin, 1996; Andréu, 2002).

For this content analysis we used the variables of Pérez-Alaejos, Terol-Bolinches and Barrios Rubio (2022) and Cavia Fraile (2016). For this purpose, we prepared a content sheet that includes qualitative parameters and other items that allow us to gain in-depth knowledge of the characteristics of the units of analysis.

1. Variables of the production process:
   a. Own or external production (production companies, broadcasters, independent creators), language (dialects).
   b. Duration (5-10 minutes, 11-30 minutes, 31-60 minutes, more than 60 minutes), genres of the video podcasts (conversational, narrative fiction or narrative non-fiction).
   c. Creative development and treatment of topics (conversational: talks, interviews and monologues; narrative non-fiction: documentaries, reports, true crime, essays, news programmes and podcasts on other subjects such as health, economics, society, self-help or development; narrative fiction).

4. Aesthetic variables:
   a. Staging: backgrounds (corporate, neutral, with audience), signs (headlines, identification, transcriptions, other types of signs), types of shots (predominance of medium, close-ups, wide shots), lighting (artificial, natural).
   b. Visual appeals to the listener, viewer: social media appeal, subscription appeal, audio transcripts.
   c. Kinesics: position of interlocutors, gestures, non-verbal communication.
   d. Proxemics: correct distance between interlocutors.
   e. Clothing: formal, informal.

6. Distribution variables:
   a. Distribution channels: Spotify, other sound apps and platforms (iVoox, Apple Podcast, Podium, Podimo, Sonora, others), other video platforms (HBO, Netflix, Amazon, Playz, other media group platforms).
   b. Social media profiles of the productions on different networks (Facebook, Twitter, Instagram, Tik Tok).
   c. Interaction with users (through networks, platform notifications, Apps, meetings and live shows).

4. Commercialisation variables:
   a. Identify the monetisation of sound projects through advertising (pre-roll, mid-roll and post-roll), branding, sponsorship, subscription, crowdfunding.
   b. Analyse exclusive advertising and advertised products, goods and/or services.

Furthermore, the research is complemented by an interview with open questions to Spotify Spain's communication department managers focused on the target profile of these formats, the behaviour of users and the possibilities of the platform with the incorporation of video.

3.1. Study sample

A total of 51 video podcasts have been located in the Spotify platform application, although the final analysis is carried out on a sample of 48 pieces, as three of them are video podcasts with still images that do not respond to the variables indicated in the methodology. A sample of 48 Spanish-language video podcasts that appear in Spotify's video podcast section is analysed, as can be seen in Table 1.

Table 1. Sample of video podcasts analysed

Name of podcast	Production	Genre/ Topic
Nadie Sabe Nada	El Terrat	Conversational/ Comedy
El búnquer	Catalunya Radio	Conversational/ Comedy
La Ruina	RTVE Catalunya	Conversational/ Comedy
El CaroLate	Spotify and Podium Studios	Conversational/ Comedy
Cuarto Milenial	Spotify Studios	Conversational/ Comedy
Riot Comedy	Riot Comedy	Conversational/ Comedy
Tómatelo menos en serio con Jameson	Europa FM	Conversational/ Comedy

Name of podcast	Production	Genre/ Topic
Y de beber, albóndigas	Podimo	Conversational/ Comedy
Poco se habla!	PhiBetaLambda	Conversational/ Comedy
Reyes del Palique	Independent	Conversational/ Social
Yo nunca	Independent	Conversational/ Comedy
Entiende tu Mente *ETM Collection*	Spotify Studios	Conversational/ Health
Los burros de Fortunato	PhiBetaLambda	Conversational/ Social
Gen Playz	RTVE	Conversational/ Comedy
De todo se sale	Independent	Conversational/ Social
Maldito Bollodrama	Independent	Conversational/ Social-LGBTI
Deforme Semanal Ideal Total	Primavera Sound	Conversational/ Feminism-Comedy
La Pija y la Quinqui	Spotify Studios	Conversational/ Social-Comedy
Hablando de inmuebles	Independent	Conversational/ Economy
Terrores Nocturnos	Independent	Narrative/ Mystery-Fiction
Pienso, luego actúo	Neurads/Fuego Camina Conmigo	Conversational/ Social
La Aldea Podcast	La Aldea	Conversational/ Comedy
Dulces y Saladas	Amazon Music	Conversational/ Comedy
Yo Interneto	Independent	Conversational /Others- Internet
Mientras te hacías el eyeliner	La Mancha Crujiente	Conversational/ Social- LGBTI
¡Qué decirte que no sepas!	RTVE	Conversational/ Others- Transmedia of the programme Masterchef
2 Gin Tonics	Independent	Conversational/ Social- Entertainment Interviews
100 minutos	Independent	Conversational/ Social- Interviews
Nude Project Podcast	Nude Project	Conversational/ Social- Interviews
¿Has traído el vino?	Agosto Estudios	Conversational/ Social - Interviews
La buena turra	Subterfuge Radio	Conversational/ Comedy-Feminism
at420 by de Rumba	by de Rumba	Conversational/ Musical
Morros de nutria	La Llama School	Conversational/ Comedy
Culturas 2	RTVE	Conversational/ Social-Cultural
Delirios Corrientes	Subterfuge Radio	Conversational/ Comedy
Mujeres en la industria	Independent	Conversational/ Musical-Feminism

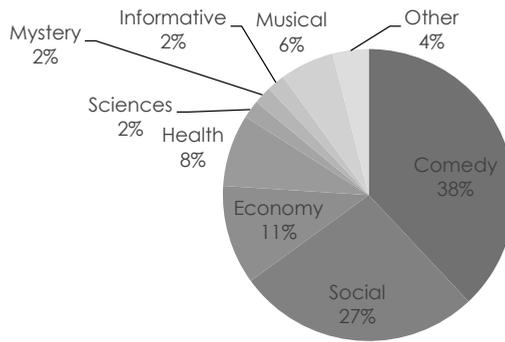| Name of podcast	Production	Genre/ Topic
Hablando con líderes	Novicap Finance	Conversational/ Economy
El Aura, con Alba Reche	Spotify Studios	Conversational/ Musical
La cámara de Gesell	RTVE Play Podcast	Conversational/ Health
Al salir de consulta	Independent	Conversational/ Health
Tu amiga psicóloga	Independent	Conversational/ Health
El pódcast del Club de las Malas Madres	Independent	Conversational/ Social-Feminism
El año de las emociones	RTVE Play Podcast	Conversational/ Sciences
Hablando Crypto	Independent	Conversational/ Economy
Libre a los 30	Independent	Conversational/ Economy
Gente sin límite	Independent	Conversational/ Economy
Informativo matinal Ángel Martín	Independent	Narrative non-fiction/ Informative
Una y nos vamos	Independent	Conversational/ Social

Source: own elaboration.

4. Results of content analysis

4.1. Production process

A total of 96% of the analysed podcasts are in the conversational genre, except for one narrative fiction piece, *Terrores Nocturnos*, in which we can see a video of a live performance of one of its audio dramas at the Estación Podcast Festival, and one narrative non-fiction podcast, *Informativo Matinal* by Ángel Martín. The language is Spanish in all of them, except for the piece *El búnquer* which is in Catalan.

The predominant theme is comedy in more than half of the video podcasts, followed by social matters, economics, health, science, music and, in similar proportions, informative topics, mystery and others that do not fit into the previous categories, as can be seen in Figure 1. In this conversational format, there is a predominance of interviews in which podcasters can be seen with celebrities or personalities relevant to the subject matter around which the audio space revolves. Feminist and LGBTI themes stand out in the comedy podcasts as well as in Spotify's self-produced podcasts with examples such as the winner of a Premio Ondas, *Deforme Semanal Ideal Total,* hosted by Isa Calderón and Lucía Lijtmaer; *El CaroLate,* presented by the well-known comedian and screenwriter Carolina Iglesias; *La Pija y la Quinqui,* a breakthrough podcast with the young Carlos Peguer and María de los Ángeles Maturana; *Cuarto Milenial* from the content creators Andrea Compton and Lalachus; *Riot Comedy,* with the comedian PennyJayG from Canal Red; *La Buena Turra* by the same comedian of Subterfuge Radio; *Maldito Bollodrama* by Laura Terciado and Bake Gómez and *Mientras te hacías el eyeliner* by the independent creators La Mancha Crujiente. The analysis also shows the existence of other feminist conversational video podcasts such as *El Club de las Malas Madres* or *Mujeres en la Industria*, which address this issue in a more formal tone.

Figure 1. Graph of thematic video podcasts analysed in Spotify

Mystery 2%
Informative 2%
Musical 6%
Other 4%
Sciences 2%
Health 8%
Economy 11%
Comedy 38%
Social 27%

Source: own elaboration.

According to data provided by Spotify Spain, the expansion of video podcast features on the platform took place in July 2022, in order to "take a step further in the commitment to audio creators, investing in tools that offer great experiences and supporting them to reach global audiences and interact differently with fans" (Spotify, 2023). In the platform's report entitled *Hábitos de consumo de pódcast de la generación Z en España* [Podcast consumption habits of Generation Z in Spain], they confirm the results of their strategy to reach these new audiences with data such as the 20% increase in podcast consumption among Generation Z in the period between 1st April 2022 and 31st March 2023 (Alonso, 2023). These podcasts attract both women (47%) and men (48%) equally. More than 50% have listened to at least one podcast in the last year and this generation, according to platform sources, is a trendsetter in cultural terms. The aim is precisely to attract this target who is "more accustomed to consuming content in images and is particularly suited to the conversational format. But it is the creators who mark this trend and from Spotify we just follow it" (Alonso, 2023).

This inclination to follow the creators' lead can be seen in the analysis of the Spanish video podcast sample, as the platform acts as a host, with only a very small percentage of self-produced projects (15%). *El CaroLate, Cuarto Milenial* and *El Aura con Alba Reche* are produced by Podium Studios, the production company of Prisa Group's Podium Podcast platform. The remaining 85% is made by production companies, independent creators and public radio and television stations such as RTVE Playz, RTVE Catalunya and Catalunya Radio. Podcasts from the Podimo platform are also hosted. This is the case of *Mientras te hacías el eyeliner*, *Y de beber, albóndigas* or production companies such as Phi Beta Lambda, whose productions include *Los burros de Fortunato*, hosted by TV presenter Jorge Javier Vázquez and *Poco se habla!* by Britten and Xuso Jones. RTVE's Playz platform includes the video podcasts *Gen Playz, Culturas 2, El Año de las Emociones, La Cámara de Gesell* and *La Ruina* by RTVE Catalunya. As for OTT platforms, HBO's *Nadie Sabe Nada* and Prime Video's *Dulces y Saladas* are investing in these productions by broadcasting their content.

More than 80% of video podcasts are between 30 and 60 minutes and 40% of these are more than 60 minutes long. A total of 17% are around 11-30 minutes long and 2% less than 5 minutes. This is the case for *Informativo Matinal de* Ángel *Martín*.

Figure 2. Graph of the average duration of the pieces analysed

Less than 5 minutes 2%
11-30 minutes 18%
More than 60 minutes 40%
31-60 minutes 40%
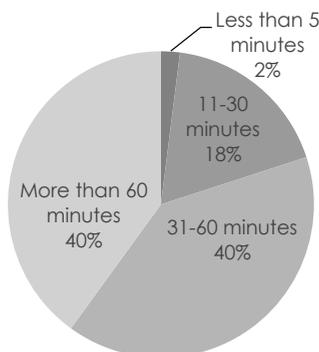
Source: own elaboration.

Conversational podcasts have a longer duration that the rest of the audio formats. Furthermore, just as the platform's sources state:

> Video also helps users to interact with our platform for longer periods of time. It helps to create a community. The interface of many of these platforms' applications and websites is increasingly designed to consume video content (Calvo, 2022).

The example of community is very evident in feminist podcasts such as *Deforme Semanal Ideal Total* and other humorous podcasts where the audience is the protagonist, such as *La Ruina, Yo Nunca* or *Riot Comedy* with live shows.

4.2. Aesthetic variables

In terms of staging, 39% are corporate and almost 22% are with an audience. This shows that staging is done by recording in professional studios or in theatres and venues where listeners are present at the live shows of the most successful podcasts, such as those previously mentioned. The studio audience is more typical of the podcasts that are recorded in collaboration with Podium Studios, such as *El CaroLate*. Furthermore, podcast editing is much more carefully done in Spotify Studios' own production podcasts in alliance with Podium Studios, such as the aforementioned, *El CaroLate*, *El Aura*, with Alba Reche, *Dulces y Saladas* from Prime Video and *Nadie Sabe Nada*, which are also designed for broadcasting on the platforms, or those by RTVE's Playz, such as *Culturas 2*, *El año de las emociones*, *Gen Playz* and *La cámara de Gesell*, in which the use of professional production, technical and human resources can be appreciated. In these cases, the editing is faithful to that of any other television format, with the insertion of videos, the use of more than two cameras and the introduction of graphics. In the same way, the sound is appreciated to a greater extent when the sound production companies are behind the creation of these video podcasts, in which multi-camera production is also encouraged, although not with the mastery of the audiovisual production companies that work for RTVE or Prime.

Figure 3. Images of the production plans of *Culturas 2* and *CaroLate*

Source: Spotify Spain.

In terms of the visual aesthetic, the shots tend to be medium close-up or medium shots, but in very few pieces are there wide shots, unless they are those with an audience, such as *El Búnquer*, by Catalunya Radio, *La Ruina, Riot Comedy, Deforme Semanal Ideal Total*, or, as an exception, *Mujeres en la industria*. The latter is a production by an independent creator in which the setting shows, through wide shots, the environment related to musical studies, with the incorporation of instruments such as pianos, guitars and other elements related to music. The lighting is similar to that of television formats on Spotify's podcasts or those created by production companies with financial resources such as *Los burros de Fortunato* by Phi Beta Lambda, *Dulces y Saladas* by Prime or *Nadie Sabe Nada* from HBO. The lighting is natural in those formats that are more homely and take advantage of outside light. An example of this is the summer slot on Xuso Jones and Brittany's *Poco se habla!* podcast.

Source: Spotify Spain.

The visual appeal relates to a prompt for the internet user to follow the video podcast's social networks or to listen and subscribe to the video podcast. In the sample analysed, 31% of the units analysed appealed to followers or subscribers, 17% encouraged people to follow their profile on social networks, 4% used signs to show how to contact them and/or attend a recording as an audience member, 33% used other types of signs to draw attention to certain topics, to tag the guests or hosts of the space and 15% of these units had no signs, only an initial header or the cover of the video podcast.

The presence of the audience is very important and becomes a key element of the audio productions, with medium and wide shots of the audience showing the relationship they have with the hosts of these spaces. In *Nadie Sabe Nada* and *La Ruina*, the audience participates in the content and the relationship of complicity can be observed in other areas such as *El CaroLate*, a format that is aesthetically very similar to the pioneering and well-known radio programme and podcast *Oh my Lol!,* given that it is a co-production with Podium Studios.

Figure 5. Audience at *CaroLate, Nadie Sabe Nada* and *La Ruina*

Source: Spotify Spain.

In most of the units analysed, the kinesics reflects complicity and closeness between the hosts and the guests/audience. Positions are relaxed, except in more formal settings where economic or health issues are discussed, with more serious interviews. The presenters and guests appear seated, although in those cases where there are live shows, the beginning and the end are performed standing up. Gestures are adaptive in most formats due to the long duration and the level of comfort in which both hosts and interviewees find themselves. Lavalier microphones are worn in the video podcasts where the production is more careful, but most of the time the microphones are on the table and the participants sometimes even hold them themselves and use them as an element that forms part of the staging. The gestures are very emotional and there is no special attention to the camera, although the image is taken into account, the priority is sound and there is no special care for posture or non-verbal expressions such as hand movements, exaggerated gesticulation and gestures that accompany what is being expressed verbally. There is applause, dancing in the comedy spaces, exaggerated laughter, excessive gesticulation.

Figure 6. Adaptive gestures in *La Pija y la Quinqui*

Source: Spotify Spain.

Proxemics shows us a correct distance between hosts and interviewees, except in cases where there is a connection through a remote application or platform such as Discord or Twitch. And finally, the clothing is casual in 85% of the cases and in only 15% of the cases is the clothing more formal because the subject matter is also more serious.

4. 3. Distribution channels

The Spotify sound platform exclusively broadcasts 31% of the video podcasts analysed, Podimo is the parent platform for 6%, Playz RTVE for 10%, Apple Podcast for 2% and the rest (51%) combine the podcast on Spotify with other platforms such as YouTube, iVoox and, to a lesser extent, Twitch.

On social networks, the main profile is on Instagram in 52% of the pieces, 23% are on Twitter, 4% on Facebook, another 4% on Tik Tok and 17% do not specify. Interaction with listeners/web users takes place through social networks in 58% of the units analysed, with a live audience in 13%, telephone contact in 8%, audio in 4% and directly through the application or platform in 4%, while it is unspecified in the rest.

4.4. Commercialisation

Regarding marketing, Spotify's exclusive advertising is inserted into self-produced video podcasts (15%), with screen inserts of the podcast with sponsor audio and advertising related to the space. In this case it is about pre-roll, mid-roll and post-roll advertising, before the piece, during and after.

The commercialisation of the rest of the productions that are not exclusive to the platform occurs through subscription in 62% of the cases, sponsorship in 19%, other types of advertising not specific to the platform in 8% and crowdfunding in 4%. In the rest of the cases, it is unknown because it is not specified. Furthermore, adverts are played on the platform while users listen to podcasts, with the exception of Premium users. In terms of monetisation, the platform gives 0.018 euros per 10 plays, so to make 18,000 euros the podcast needs to be played a million times. Therefore, there is also the option of podcast subscription, listener support, the ad scripting service and branding (Spotify, 2020).

If we look at the products and brands that appear in the pieces, the video podcasts are associated with mobile telephony such as Pepephone (a Spanish phone company), companies such as Amazon and, fundamentally, alcoholic beverages. A prominent example is Jameson, the title sponsor of Europa FM's *Tómatelo menos en serio con Jameson* [Taking it less seriously with Jameson], and other beverages that appear as product placement in various entertainment programmes: Beefeater, Ballantines, Ambar Cervezas, La Navarra, Mahou, Felina. Some even allude to drinks in the names of the podcasts: *2 Gin Tonics, ¿Has traído el vino?* [Did you bring the wine?] and *Una y nos vamos* [One and we're leaving]. The relaxed tone of many of these formats lends itself as an accompaniment to listening and viewing.

Figure 7. Brands that appear as product placement

Source: Spotify Spain.

5. Discussion

The results obtained in this research form part of an initial phase in the analysis of these formats on the constantly evolving Spotify platform in Spain. The study of the proliferation of this format on an audio-only platform is a new development, despite the prevalence of the video podcast on YouTube. In research such as that of García Marín (2022), which contextualises the use of podcasts on the YouTube platform, the emphasis is placed on amateur productions and independent creations. We now see through the research that the Spotify platform is empowered by the platform's own commitment to converting these formats into spaces with their own quality and identity.

Visual radio content or radiovision, as described by Cavia (2016), has been analysed in terms of context and staging, as it is simply a matter of adapting the content that is broadcast and produced in a radio studio into an audiovisual production. Therefore, the video podcast has a very different and intentional audiovisual purpose which is known to content creators and to the public who are accustomed to multi-screen video consumption.

Podcasting by professionals, initially intended to be hosted in the repositories of radio stations, is becoming more professional with the proliferation of platforms. With the irruption of the Internet, the use of mobile devices and the convergence of languages and media, new logics associated with digital transformation are consolidated, as pointed out by Pérez Escoda et al. (2021) and this analysis seeks to explore these convergences in greater depth. It is not only a question of improving the interface for hosting videos, but also of changing the concept of alternating audio and video with a multi-purpose narrative, which has so far not been perfected, and placing value on the creation of community through images.

6. Conclusions

Based on the data obtained from the analysis and the interview with the managers of Spotify's Communication Department in Spain, it is corroborated that the video podcast fits in with the consumption habits of Generation Z. According to the company's own metrics in Spain, there has been a 20% increase in listeners/viewers of the target audience. Digital natives are more accustomed to consuming content with images and, moreover, the conversational format is the most suitable for this. A total of 96% of the video podcasts analysed are conversational and can be viewed and/or listened to without losing information.

On the other hand, this format allows creators to make use of the benefits of video, with the insertion of graphic elements, visual appeals, such as social media following or invitations to subscribe and videos of connections with other content contributors. The duration of the video podcasts ranges from 31 to 60 minutes and some even last more than an hour, a consumption time that the platform itself attributes to the feeling of belonging to the community and interaction that most of these audio productions aim to achieve. Audience ownership and visualisation is conducive to a sense of community and encourages listening and/or viewing. The proximity of the hosts to the guests/characters appearing in each episode also contributes to fostering naturalness and closeness, provoking empathy among the followers of the video podcast. According to Spotify officials, video encourages users to spend more time interacting with the platform thanks to an interface designed to consume visual content.

The fact that there is greater or lesser attention to aesthetics and visuals is due to the economic resources and the production of the content itself and, although there is still little production by Spotify (15%), there is an interest in this type of productions, which are developed with great professionalism by production companies and sound studios. Creators generate their identity through sets and environments to bond more closely with their followers. Another of the main advantages for creators is the insertion of advertising, with sponsorship and product placement thanks to the display of this content. It is striking

that alcoholic beverages sponsor the sound spaces or appear as advertising products, which indicates that both the creators and the consumers of these productions associate the format with leisure and entertainment, especially when it comes to conversational comedy.

If we were to consider possible weaknesses, we could compare the consumption of video podcasts on Spotify with the consumption of video podcasts on YouTube, the latter platform not having been designed for audio consumption originally. Although it should be noted that, according to the study *The New Rules of Podcasting on YouTube* by Coleman Insights (Radio Ink, 2023), it is the preferred option for users who consume podcasts. The difference with YouTube lies in Spotify's interface, which allows the user to decide whether to listen to or watch the podcast at a time of their choosing. Audio will always be more prominent on Spotify than on YouTube, Tik Tok or any other social network.

Finally, the hypothesis that these new formats are cultural trendsetters and reach Generation Z is associated, in addition to a greater number of digital audio consumers, with the possibility offered by the platform for anonymous creators to disseminate their content and reach other targets. Faced with the platform's termination of contracts with big stars in the USA such as the Duke and Duchess of Sussex or Michelle Obama due to lack of profitability, the creators of more modest or independent content are gaining prominence on the platform. Proof of this is the Spotify exclusivity of the podcast of two youngsters who started out as unknowns, *La Pija and Quinqui*, who have achieved unprecedented success from an amateur start (proof of this is the interview they did with the President of the Spanish Government, Pedro Sánchez), or the success of productions such as *Cuarto Milenial*, by two content creators, Andrea Compton and Lalachus, who are becoming increasingly popular and well-known among the new generations and consumers of digital audio.

Much remains to be explored, but a new avenue is opening up that can be explored in greater depth with the analysis of new variables associated with the improvement of these formats and a more detailed study of the behavioural habits of new audiences.

As a final reflection and as a path for future research, we can ask ourselves whether a podcast loses its essence when combined with an image, given that we are facing the transformation of the digital audio industry and the incorporation of video leads us to consider whether we are facing a format that may not be considered a podcast, as we understand a podcast to be audio content. This phenomenon is comparable to other historical moments such as the birth of television media with a more radio-like language. However, there is a distinction to be made between producing a podcast with video, without thinking of a common and versatile language for the purpose of being heard or seen, and a video podcast, which requires a different narrative, aesthetics and appeal for the audience compared to the television format or even YouTube videos.

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9. Responsible declaration of the use of Artificial Intelligence

I confirm that I haven't used any Artificial Intelligence tools.

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