

## **Podcasting as Public Media: The Future of U.S. News, Public Affairs, and Educational Podcasts**

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This article identifies a U.S.-based podcasting ecology as public media and then examines the threats to its future. It first identifies characteristics of a set of podcasts in the United States that allow them to be usefully described as *public podcasting*. Second, it looks at current business trends in podcasting as platformization proceeds. Third, it identifies threats to public podcasting's current business practices. Finally, it analyzes responses within public podcasting to the potential threats. The article concludes that currently, the public podcast ecology in the United States maintains some immunity from the most immediate threats, but there are also underappreciated threats to it, both internally and externally.

*Keywords: podcasting, public media, platformization, business trends, public podcasting ecology*

As U.S. podcasting becomes a commercially viable part of the media landscape, are its public service functions at risk? This article explores that question, in the process postulating that the concept of *public podcasting* has utility in describing not only a range of podcasting practices, but also an ecology within the larger podcasting ecology—one that permits analysis of both business methods and social practices, and one that deserves attention and even protection. This analysis contributes to the burgeoning literature on

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Date submitted: 2019–09–27

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podcasting by enabling focused research in this area, permitting analysis of the sector in ways that allow thinking about the relationship of mission and business practice sectorwide. Further, we believe that extending the concept of public media to podcasting, which exists in the United States both within and beyond public broadcasting, can enrich the academic study of public media, which historically has been focused on state-subsidized broadcasting.

### ***Growth of Podcasting as a Business***

Podcasting became a mainstream phenomenon in 2005, when Apple added a Podcast Directory to its iTunes 4.9 software. This made it possible for users to access what the company's then CEO Steve Jobs referred to as "TiVo for radio," "Wayne's World for radio," and the "hottest thing going in radio" (Herrman, 2016, para. 1). Since then, it has grown to become a small but increasingly important part of the U.S. media landscape. In 2018, more than half of people over age 12 had listened to at least one podcast, up from 44% in 2017. Podcasting has increasingly differentiated itself from the radio industry, with distinctive formats and business services and practices, including dynamic ad insertion and search recommendation engines. Some believe that podcasting has reached a tipping point, where potential advertising revenues make it suddenly interesting to a much wider range of players—what Edison senior vice president Tom Webster called "a watershed moment for podcasting—a true milestone" (Edison Research, 2019a, p. 1). Scholar John L. Sullivan (2018) calls this a moment of formalization, bringing consolidation, rationalization, and greater financial transparency.

Nonetheless, podcasting remains a small element of the U.S. media landscape, accounting for \$479 million in U.S. ad sales in 2018. Podcast ad sales are less than 9% as large as the U.S. market for traditional radio advertising in 2023, and less than 1% as large as U.S. spending for Internet ads (PwC, 2019).

A mere 15% of 700,000+ podcasts have enough listeners and resources to generate revenue ("Podcorn Launches Platform," 2019). The financially viable podcasts, as Heeremans (2018) notes, have the backing of large media institutions. Of those in the top 20 podcasts (by listenership), a remarkable number feature news, public affairs, educational, and other informational content relevant to public life, and conversations about important public issues. Further, more than half of podcast listeners routinely listen to news/current events, and more than a third listen to educational programs (Westwood One, 2018).

Looking at the top 20 (Figure 1), 13 could be so characterized: Three are news programs, two are topical economics programs, two are science programs, two feature mini-lectures/discussions on general knowledge, one is a business program, one features storytelling about public issues and social values, one is a comedy show about the news, and one is an interview program on public issues and the arts.

Rank	Podcast name	Source
1	The Daily	New York Times
2	This American Life	This American Life/Serial
3	Stuff You Should Know	iHeartRadio
4	Up First	NPR
5	The Ben Shapiro Show	Daily Wire
6	Pardon My Take	Barstool Sports
7	Call Her Daddy	Barstool Sports
8	Planet Money	NPR
9	TED Radio Hour	NPR
10	Hidden Brain	NPR
11	RadioLab	WNYC Studies
12	Wait Wait...Don't Tell Me!	NPR
13	Fresh Air	NPR
14	Freakonomics	Freakonomics
15	TED Talks Daily	PRX
16	The Ron Burgundy Podcast	iHeartRadio
17	How I Built This	NPR
18	NPR Politics Podcast	NPR
19	Fantasy Focus Footbal	ESPN
20	Sword and Scale	Kast Media

**Figure 1. Top 20 podcasts by listenership in September 2019. Note. Ranking is based on Podtrac measurement data for Unique U.S. Monthly Audience. Ranking includes shows that participate in Podtrac measurement for the full month for which the ranking is being released (Podtrac, 2019).**

### Public Podcasting

This fact-fueled, story-driven media ecology can usefully be described as public podcasting, which has hitherto been referenced, but not analyzed as such, in podcasting literature. Scholars have looked extensively at educational uses of podcasts (e.g., Campbell, 2005; Copley, 2007; Frydenberg, 2008; Lazzari, 2009; Nwosu, Monnery, Reid, & Chapman, 2017). They have pointed to the role of particular podcasts in providing a showcase for minority voices (Copeland, 2018; Florini, 2015; Park, 2017) and as journalism (Funk, 2017). They have analyzed individual public-media podcasts (Berry, 2015; Ora, 2018) and performed case studies on cultural production of individual podcasts as exemplars of emergent innovative processes (Barrios-O'Neill, 2018). This work has demonstrated a rich array of public service functions of podcasting, and it has validated a claim to podcasting's capacity for social importance and public service.

We propose that understanding public service podcasting as an ecology extends this knowledge. We provide several ways to describe that ecology.

### **Public Broadcasting Support**

First and simplest, we can point to the dominance and leadership of U.S. public broadcasting entities in podcasting. Of the top 20, 11 are produced by public broadcasting entities (including *Freakonomics*, an independently produced program whose success depends on relationships with public broadcasting entities). Furthermore, public broadcasting entities, both stations and producer/distributor networks such as American Public Media (APM), National Public Radio (NPR), and Public Radio Exchange/Public Radio International (PRX/PRI), have taken leadership in investing in the form. NPR has developed reliable metrics from its Remote Audio Data analytics technology, which uses a mobile app to measure listening in tagged podcasts, and PRX/PRI has developed dynamic ad insertion technology. They have developed aggregators that offer both discovery and consumption: NPR has NPR One, and Radiotopia, a nonprofit that works within the orbit of public broadcasting, has Radio Public. They have invested financially in platform building; NPR and related public broadcasting entities have purchased Pocket Casts.

These top-rated shows have myriad siblings and cousins not only further down the chart of popularity, but also throughout the financially viable podcast environment and throughout the public media environment. These include true-crime programs *Serial*, *In the Dark*, and *Criminal*; environmental programs such as *HumaNature*; science programming such as *Science Vs*, *Story Collider*, and *Science Friday*; history programs such as *Backstory* and *Throughline*; news analysis such as *On the Media* and *The Brian Lehrer Show*; the breakout prison show *Ear Hustle*; and many more produced through public radio stations, independent producers distributing through public broadcasting–related apps, and public broadcasting service organizations.

### **Public Functions**

Second, we can point to the public service function of the podcasts in this mini-ecology. It has been argued that public service media (traditionally public broadcasting) functions as a space in what is sometimes called the pseudo-public sphere (Blumler, 1992), a zone in which media enacts and models behaviors of civil discourse. It has been described as a service of the “microdynamics of democracy” (Dahlgren, 2006, p. 282) by engaging viewers with important issues and providing them information to fuel informed conversation. This concept draws from a notion of publicness particular to the American tradition of pragmatism (Dewey, 1927), although it invokes the language of the more familiar Habermasian arguments about the public sphere (Calhoun, 1992; Gripsrud & Eide, 2010; Habermas, Crossley, & Roberts, 2004). For Dewey, a public shares in common the effects of both corporate and government actions; it constitutes itself in addressing them by communicating with others similarly affected in its own defense (Dewey, 1927; Westbrook, 1991). Communication becomes action.

Within that Deweyan notion, public media has more generally been defined as

projects and behaviors that address and mobilize publics, within any media. Some media are designed for this purpose (prestige journalism, public broadcasting), while others may do that occasionally (commercial television and radio, blogs). . . . Communicating about shared problems . . . builds a group’s awareness of itself as a public. In this context, public

media are media that aim to increase public knowledge and cohere and mobilize audience members. (Aufderheide & Clark, 2008, pp. 1–3)

Given that definition, podcasts outside public broadcasting also sometimes function as public media. *The New York Times* podcasts subscribe to its mission to help “people understand the world through on-the-ground, expert and deeply reported independent journalism” (*The New York Times*, 2019). Slate has a roster of 25 largely news-and-information-oriented podcasts. iHeartMedia, a highly commercial company that has no lofty mission, nonetheless includes some programming with rigorous factual and informational standards, such as *Stuff You Should Know*. Gimlet Media’s podcasts carry the public media ethos into its productions, although its leadership broke away from public broadcasting to form a for-profit company (eventually sold to Spotify). Even comic and satirical coverage of the news has been shown to fuel public conversation about relevant issues (Borum Chattoo & Feldman, 2017; Brewer, Young, & Morreale, 2013). We include relevant podcasts, which fit the definition of public media in a Deweyan sense.

These podcasts demonstrate their performance of this function in a variety of ways. First, they participate in the U.S. news and public affairs ecology, as mapped by Benkler, Faris, and Roberts (2018); their parent companies, several of which feature prominently as nodes on the authors’ map of news-sharing practices (see Figures 2.1, 2.2, pp. 48–49), share the expectation of fact-based reporting, fact-checking, and ethical responsibility for presentation. For instance, *This American Life*’s featuring of Mike Daisey’s fiction-laced narrative of visiting the site of Apple iPhone production in China resulted in a nationwide discussion about journalistic ethics, and an extensive retraction (Glass, 2012). *Caliphate*, a 2018 podcast miniseries from *The New York Times* that made the top-recommended lists of many critics for the year, also spurred vigorous discussion about the challenges of interviewing known terrorists (Brockes, 2018).

Second, anecdotally their work has demonstrated public effects. For example, *Serial*’s investigation into a young man’s murder trial was instrumental to reopening his case. Another public media podcast, *In the Dark*, contributed to a Supreme Court decision on whether jury selection was racially biased. *Caliphate* created controversy within the Canadian legislature, among other places, over questions of the series’ subject remaining in Canada (Malcolm, 2018). African American podcasts, wryly called by some podcasters the “Chitlin’ Circuit,” form a distinct social space, much as Black Twitter does (Florini, 2015). Podcasters themselves have been discussed as “recursive publics,” networked groups that invest in protecting and developing the technologies that link them (Bonini, 2015). This is in marked contrast to the kind of engagement that entertainment podcasts routinely undertake, which typically simply promotes the program and builds its fan base (Wrather, 2016).

Third, we found some congruence between the concerns of Americans, as defined in monthly Gallup polling (Gallup, 2019), and topics covered in public media podcasts.

### ***Congruence of Concerns and Content: Methodology and Results***

In a simple, supervised one-coder exercise, we selected *The Daily*, *This American Life*, *Stuff You Should Know*, *Up First*, *Planet Money*, *TED Radio Hour*, *Hidden Brain*, *RadioLab*, *Fresh Air*, and *Freakonomics* as the top 10 podcasts with a focus on news, public affairs, and civic knowledge. We chose the period

September 1 to October 20, 2019, to capture five consecutive episodes of each podcast. To identify content, we depended on descriptions on the podcasts' websites and/or their Apple Podcast descriptions. For podcasts with descriptions that were not clear enough, we listened to the first 15 minutes of the episode.

We then selected the results of a Gallup poll (Gallup, 2019) of the general populace on what they identified as "The Most Important Problem" from May to November 2019 and compared the topics of top concern for Americans with topics in the podcasts.

For the terms in the Gallup poll, we found that all the podcasts we selected covered some of these issues, some repeatedly even in this short window. Two podcasts covered two such issues; five covered three such issues; and three covered four such issues. The raw data are available from American University's Institutional Repository (AU Digital Research Archive, 2020).

### ***Ecology of Relationships***

Finally, we argue that this is a coherent ecology because of multiple relationships between different entities. U.S. public broadcasting itself is an ecology, not a system (Aufderheide, Clark, & Shapiro, 2008). The public broadcasting audience is ultimately reached through stations, which have autonomy in programming and which may or may not be producers. The stations are served by a wide range of actors, including nonprofit producers, programmers and distributors, business back-end providers, research services, and the entity that manages the federal contribution to the budget, the Corporation for Public Broadcasting. Public broadcasting and commercial public media may have relationships; for instance, *The Daily* is distributed via public broadcasting. iHeartRadio and Spotify distribute NPR podcasts, including *TED Radio Hour*.

We understand public podcasting to serve the American public, with synergies with other public media such as newspapers, magazines, public radio, and public TV.

### **Business Trends in Podcasting**

Public podcasting operates within a rapidly changing business environment for podcasting. This can create new opportunities and threats.

Podcasting in the United States has developed up until now within a relatively protected cultural and economic space. Until recently, podcasting has been more of an investment or experiment than a profit center, even for popular podcasts. Public media, including stations, consortia, and programmers/distributors such as NPR, PRX, and APM, have used synergies with existing programming and developed new programming with in-house skills. Public podcasting has also benefited from a culture of donation, over decades of pledge drives. Podcasting economics until recently was a mix of highly targeted advertising and donations (Heeremans, 2018; podcast revenues are free from public broadcasting's advertising ban.)

Podcasting, as it scales, has some features that become attractive to many more players without any public service mandate. It can be cheap to produce; some of the most successful programs yield high profit

margins—18%–54%—because they cost relatively little to produce and offer good advertising value. Podcasting demographics are young, upscale, and often hard to reach via other traditional media (Ehrlich, 2019).

The advertising market has appropriately ripened, shifting from long-term sponsorships for announcer-read spots to conventional, standard-length commercials (Jin, Segal, & Carroccio, 2019). Analytics have improved; Apple began in December 2017 to offer producers anonymized listening data from its app (Quah, 2017). In 2018, the Interactive Advertising Bureau, an industry trade group, launched its podcast measurement certification program (“IAB Tech Lab,” 2018). In addition, National Public Radio released an open source system that enables podcast publishers to count listeners (Goers, 2018). Programmatic advertising has increased accordingly (Interactive Advertising Bureau, 2019).

Public podcasting has so far demonstrated financial success. *The New York Times’ The Daily*, which is aired on public radio stations via the public radio distributor APM, is highly profitable, with ad revenue reported to have been “in the low eight figures” in 2018 (Pompeo, 2018). NPR has successfully monetized its podcast programming, and podcast revenues account for ever greater portions of NPR’s budget (Jin et al., 2019). Its projected 2020 sponsorship earnings from podcasting would double its sponsorship amounts over three years and account for more than 20% of its total budget (Falk, 2019). In 2015 NPR, WNYC, and WBEZ hosted the first podcast-focused upfront presentation—a programming showcase for advertisers that encourages them to include the podcasts in their yearly buying plans (“NPR, WNYC and WBEZ Announce,” 2015). Outside of public broadcasting but within the public podcasting sphere, Slate is now drawing half of its revenue from podcast sponsorship, with listenership growing dramatically from 2017 to 2018 (at 78%) and again in 2018–2019 (39%; Barber, 2019).

### **Changing Terms of Business**

Platformization poses new challenges for many existing players, including public media. Scholars have warned for some time that podcasting’s increasing popularity would change its character. The scrappy, unpredictable little-guy medium that emerged as a geekily creative space in both journalism and storytelling more generally runs the risk of being “colonized by the mainstream” (Markman, 2015). Mobile apps, which arise from a variety of sources and have various features that algorithmically channel a listener’s selection while building audience, can channel listeners to a kind of Top 40 set of choices: “The homogeneous nature of recommendations and the curated lists foregrounded within mobile podcasting apps suggests that, while there exists a large range of programming, the most-listened and promoted programs are products of larger and more powerful media institutions” (Morris & Patterson, 2015, p. 228).

But 2018 was, for many industry observers, a pivot point. Venture capital was coming into the space. Venture capital firm Andreessen Horowitz, citing data from PitchBook, found that dealmakers raised \$203 million for 29 private podcasting-related transactions in 2018, up from \$161 million for 23 deals in 2017, and \$40 million for 13 deals in 2016 (Jin et al., 2019).

Platformization may be the biggest change on the horizon. The tendency for media to be located on platforms that media makers do not control has had profound effects on the business of news media, film, and games (Hindman, 2018; Lotz, 2018; Nieborg & Poell, 2018). In the field of media management,

scholars including Michael Porter (1998) and Bruce Greenwald and Judd Kahn (2005) persuasively argue that companies hoping to become dependably profitable over time need to limit competition by cultivating barriers to entry, such as scale or customer captivity. Platforms such as Google Play, Amazon Prime, Facebook, and (particularly relevant for podcasting) Apple profoundly affect the business, technical, and creative environment, as many have noted. Whether it is the opaque algorithmic management of content (Gillespie, 2018), the multisided nature of the market, such that traditional relationships are eroded (Nieborg & Poell, 2018), the network effects that lead to monopolization (Hindman, 2018; Wu, 2018), or the data-harvesting imperative that drives toward universal surveillance (Suzor, 2019; Zuboff, 2019), the rise of platforms has been seen as an often alarming signal of centralization of power and control. Power and control are centralized by a combination of tactics. One is the aggregation of the functions of storage, discovery, and consumption (Sullivan, 2019). Another is the way in which overlapping of content and conduit functions creates new opportunities for control (Lotz, 2018).

Podcasting has long been marked by decentralization; podcasts were accessed via RSS feeds, and RSS simply links to a file that can be stored anywhere. Lack of central sites to find and listen to podcasts was a barrier to growth until the Apple iPod and iPod app led to wider adoption. Sullivan (2019) has proposed that even in the decentralized environment of podcasting, platformization is an emerging reality. He sees the RSS feed declining in importance as podcasters, in search of viability, lock in listeners with premium on-site content (Sullivan, 2019). Recent investment in podcasting has focused on subscription and other premium strategies that supersede RSS. Quake Media has raised money from investors, including Jeffrey Katzenberg's WndrCo, to introduce a \$6.99-a-month subscription podcast service (Quah, 2019). Sports media company The Athletic also announced a plan to offer subscription-only podcasts (Fischer, 2019). For Sullivan (2019), this opens the door to centralized control on the part of larger players.

As well, Sullivan (2019) sees platformization proceeding because very large players—Apple, Google, Spotify—are fully engaged, serving both discovery and consumption. The lure of new vistas in data collection drives the development bus (Sullivan, 2019). Apple, which links to RSS files and does not collect data, is well established. Google, with its massive global reach, capacity for personalization, and ability to control discovery and consumption, is positioning itself in the platform wars. It caches other podcasts, thus making it impossible to do dynamic ad insertion, but does not cache its own (creating a reason for consumers to prioritize its podcasts). In 2016, it added podcast features to Google Play Music (Pratt, 2018). In June 2018, it introduced its podcast app for Android users. The company also streams programs via Google Assistant-powered devices—including its Google Home smart speakers—opening the way for interoperability between devices. It expects to double worldwide podcast listening with its services in the next few years (Pratt, 2018).

But the news that Spotify—which reported that it had 217 million active monthly users globally at mid-2019—was folding podcasting into its offerings potentially changed the dynamics of platformization (Spotify Technology, 2019a). Spotify provides storage, discovery, and consumption services in one place, is well-established in music, and is an eager collector of consumer data. In 2019, it bought major podcast producers such as Gimlet and signed exclusive deals with popular producers, with 15 original or exclusive podcasts. It also announced a multiyear deal with Barack and Michelle Obama's Higher Ground production company to make podcasts exclusively for Spotify's subscription and ad-supported platforms (Spotify

Technology, 2019a). Spotify is working to create discovery options for podcasts like the ones it has for music; it has, for instance, created playlists around different genres. In 2019, it tested playlists for users internationally in Comedy, True Crime, Geek Culture, Walking (Motivational), and Relaxing (Mindfulness; Quah, 2019).

Pandora Media, which satellite radio's SiriusXM bought in 2019, has begun to offer some SiriusXM shows as podcasts, and it intended to buy many more—as many as 10,000 by the end of 2019 (SeekingAlpha, 2019). Pandora describes itself as a platform. It does not cache RSS feeds, but it does mine them extensively to support its Pandora Genome Project. Pandora believes it can drive listeners to its platform by appealing to discovery challenges; it hopes to create an industry-leading recommendation engine like the one it uses in music, which tags songs with more than 400 musical and lyrical characteristics. Its Podcast Genome Project tags programs with more than 1,500 attributes, including user skips and replay (Perez, 2018). “No one has taken the time to analyze everything that’s being discussed in a podcast episode, and then extract those nuggets that might be the key discovery moments,” Pandora Chief Product Officer Chris Phillips said. “If we know you care about a particular topic, we can find the podcast, the needle in the haystack, and put it in front of you” (Pandora Media, 2019, p. 22).

Other business strategies attempt to counter this platformization move. iHeartMedia, the United States' largest terrestrial radio broadcaster and commercial podcaster, developed a plan in 2019 to promote new podcasts via its stations in 160 U.S. markets and made a play to become a one-stop shop for audio advertising: Widely distributed podcasts could appeal to national brands, while individual stations continue to sell to local buyers. However, this move to create a network that captures advertising dollars with network effects could also be driven by the weakening of radio advertising. Ad company GroupM expects radio ad sales in the United States to fall 3.4% in 2020 if one factors out the election-year influx of political ads (GroupM, 2019).

Several other companies hope to create subscription-based walled gardens that could function as platforms. Luminary became the most prominent company in this group after it raised nearly \$100 million in venture capital and launched a \$7.99-a-month podcast subscription service (Barnes, 2019). Its exclusive programming includes some public-purpose programming, such as *The Axe Files With David Axelrod*, *Deep Background With Noah Feldman*, and *Planet Money* creator Adam Davidson's *The Passion Economy*. However, Luminary does not have the related assets of an Apple, a Google Play, or a Spotify.

### **Threats to the Public Podcasting Ecology**

In the medium term, platformization bodes a sea change in media in general, and to podcasting in particular. The arrival of Spotify was a signal to the field that the choices will increasingly be to bulk up, be bought, or join. The emerging platform space consolidates the field of podcasting, promising to make podcasting a more central and popular media habit. It is also likely to constrain new, small, and independent players; to channel new production in ways that platform algorithms encourage; and limit the power and control of any business dependent on the platform, including public media. For instance, programmatic advertising often involves Google and Facebook, which control more than 60% of digital ad spending (Sterling, 2019). This has implications for access, given that both services use opaque

algorithms to rank display of information for users. As the head of strategy for a major media company said to us, the implications are existential for podcasters: "Are they [Google and Facebook] going to move aggressively to build their own ad businesses [in podcasting]? Or are they going to be more passive gatekeepers?" (Anonymous, personal communication, March 6, 2019). The record so far from other fields suggests the former.

The nature of this threat is well identified in scholarly literature. Not only Sullivan (2019), but also Nieborg and Poell (2018), warned generally of the "platformization of cultural production," with large companies increasingly controlling the terms of access for cultural producers and, ultimately, consumers. As Gillespie (2018), Lotz (2018), and Suzor (2019) have differently noted, these platforms have monopolistic capacities that go far beyond the platform-as-intermediary. In reality, they are not merely platforms, but hybrids, marrying old business models, such as vertical integration and subscription, while also describing new network features, including recommendation engines. Ultimately, their growth and evolution depend, as Zuboff (2018) notes chillingly, on data mining, which depends on continuous surveillance.

In the short run, even in the relatively decentralized environment, the growth of advertiser interest in podcasting leads both to an expansion of financially viable podcasts and to productions that tilt more toward the entertaining, sensational, or shocking than the informative. Comedy podcasts accounted for 18% of the medium's ad sales in the first three months of 2019, research firm Magellan (2019) reports. That was followed by News & Politics (15.9%), Society & Culture (14.2%), Sports & Recreation (10.6%), Business (8.1%), Health (7.4%), and Science & Medicine (3.2%), with other categories collecting 22.5% (Magellan, 2019).

Spotify CEO Daniel Ek and others believed, in 2019, that infotainment was accounting for most new growth, potentially crowding out more substantial or civic content. Ek told Wall Street analysts he anticipated that news "with [its] short shelf life, ends up being a smaller part of the overall mix" (Motley Fool Transcribing, 2019, p. 1).

Ek called "true crime" content

a massive category for us and growing very, very fast. But we're also seeing, of course, music podcasts growing very fast, which if you look historically in podcasting, that's not been a big category, but that's becoming a much bigger one. (Spotify Technology, 2019b, p. 1)

iHeart's top podcasts in late 2019 included *The Ron Burgundy Show*, *Stuff You Should Know*, and the right-wing commentary *The Ben Shapiro Show* (iHeartRadio, 2019). It also offers podcasts of radio shows by some of its most popular personalities in broadcast syndication, including Rush Limbaugh, Sean Hannity, and Glenn Beck, all of whom have been noted for conspiracy mongering and opinion over fact. Pandora's growth is fueled by entertainment content. In March 2019, its owner, SiriusXM, introduced a content team for the streaming service that it said will focus on creating programs in "music, sports, and talk content ranging across comedy, politics, and entertainment" (SiriusXM, 2019, p. 1).

By contrast, news, public affairs, and educational podcasts are typically highly produced, and public radio podcasts usually require a team of five to six people to produce a regular series. News or public affairs have short shelf lives, which makes them expensive to produce. Many public media podcasts and podcasts distributed on public media, such as *On the Media* and *The Daily*, benefit from being embedded within a large news organization. *The Daily's* staff size is exceptional even within public media circles. It has 15 people, half of the *Times'* audio team, which also has three studios (Southern, 2019). "*The Daily* is bolted onto a really strong newsroom and pool of journalists—making it somewhat of an interview show with *New York Times* journalists from around the world" (C. Byrne, personal communication, September 16, 2019). iHeartPodcast Network president Conal Byrne told us, "That is a difficult thing for other news and politics podcasts to replicate as they test the space" (C. Byrne, personal communication, September 16, 2019).

At the same time, an organization with deep enough pockets can afford to feature prestige programs that garner publicity and legitimacy, potentially cutting into public podcasting's core audience. David Axelrod's move to Luminary, Spotify's purchase of Gimlet, and Barack and Michelle Obama's exclusive deal with Spotify suggest that public media does not have a unique claim on public-purpose producers.

### Reactions Within Public Podcasting

How concerned are public podcasters about prospects for public podcasting at a point in the field's development that scholars have identified as threatening its future? There has in fact been little public discussion about public podcasting and platformization, or indeed of centralization more generally, among practitioners, whatever the private conversations. For instance, between January 2017 and November 2019, as podcasting's economics pivoted, *Current* newspaper, the medium of record for public broadcasting, had no coverage of the challenges for public media's podcast production within the changing economic context; however, it did have ample coverage of individual podcasts, the acquisition of Pocket Casts, and podcast metrics. This was not a surprise, given the decentralized institutional structures (Aufderheide et al., 2008), competitive business arrangements, and lack of bridges between public broadcasting institutions and other, more commercial public podcasters.

Individual producers and executives have publicly reflected on the challenges of maintaining the public podcasting ecology, although not directly related to emerging business trends. In 2015, a major brouhaha occurred: One of public podcasting's most successful figures, Ira Glass of *This American Life*, said at an event held by public broadcasters to raise advertiser interest, "My hope is that we can move away from a model of asking listeners for money and join the free market. . . . Public radio is ready for capitalism" (Gillies, 2015, para. 1). This comment created a furor, and Glass clarified,

Our mission is everything to me. It's the most important thing about our jobs, the premise of the whole operation and of how I've spent all my working days since I was a teenager. . . .I'm not advocating a cartoony and stupid version of embracing capitalism. I see a huge middle ground, where we keep our mission and our ideals, and bring in more money using the conventional tools of the market economy. . . . I think public radio will handle this new revenue the way we've handled all the money we've brought in until now: We'll use it to make the same idealistic and ambitious stuff we've always made. (Glass, 2015, paras. 3–8)

While public podcasters have gone on to embrace advertising enthusiastically, concerns persist. Podcasting consultant Eric Nuzum, despite having left public broadcasting after two decades, remains inspired by its promise and joined the chorus of concern over the potential loss of mission:

One of my worries is that public radio will lose itself in the exciting evolution of podcasting. When I talk to many of the people involved in public radio's podcasting efforts, I hear lots about CPM rates and dynamic ad insertion technology. I don't hear much about mission and public service. . . .

Lately, when I'm lucky enough to have a happy-hour conversation with former public radio colleagues, I've been asking them: If the Public Broadcasting Act expired after 50 years and needed to be completely rethought for today's media landscape, how would it be different? What would continue? What would go away? . . .

The great news is there is a massive opportunity—right now—for public radio to have its cake and eat it too. You can find ways to monetize the content you create, *while also* taking a fresh look at the ideals that forged the industry and applying them to the digital age.

In the exciting and increasingly commercialized podcast boom, public radio's path won't be forged by just following what everyone else does. Your essential role is to double down on mission. Stations don't need a permission slip to do this. The only gatekeeper is a lack of ambition. (Nuzum, 2019, paras. 37–41)

Radiotopia producer Julie Shapiro speculated from the front lines about the dangers of a loss of culture and mission; she too expressed awareness that the public service mission of public broadcasting was not necessarily an enduring feature of public podcasts:

I wonder what will happen when the next generation of podcasters enters the arena, having skipped over the public media system completely . . . what will be lost, alongside this meteoric shift away from the public broadcasting system, as podcasting rockets into the future? What will happen when investors and Hollywood and celebrities crowd out the smaller voices, the passion projects, the unbridled ambition to give voice to all the people, to tell the stories of our lives, our communities and our culture? . . .

Will the core directives and aspirations of the [Public Broadcasting] Act [of 1967] remain intact as podcasting spreads deep into mainstream and commercial American culture? . . . [Public] network decision-makers can (and should) uphold the quality and integrity that the Act stands for as they create new shows. Podcast execs can (and should) strive to bring on diverse talent from inside and beyond the already established arena. Stations can (and should) create and fully support opportunities for employees to explore podcasting before the best and brightest public radio talent leaves the system. (Shapiro, 2017, paras. 7, 10, 12)

For public podcasters not within public broadcasting's aura, the possibility that advertiser interests win out over mission may be even greater. For instance, in a conversation with Erik Borenstein, who is now Director of Audio and TV at *The New York Times*, we asked about the temptation to produce more entertaining and potentially less substantive coverage to attract advertising. That executive showed a reluctance to say that a news report on, say, Afghanistan would be of any more public interest than a travel feature. "The subject matter of the show is aligned with the Times' mission of seeking truth and helping people understand the world. Lots of stories fall within that lens," Borenstein said (personal communication, August 1, 2019). Yet travel features are designed for personal consumer interests in tourism, whereas information on international conflicts generally informs public conversation about policy. Mission slippage is already in evidence.

Julie Shapiro's stress on mission is related to a problem she also alludes to: the brain drain from public podcasting into the larger, more commercialized arena. Gimlet may be the most spectacular instance of that brain drain (Kachka, 2019), but the loss to public media of other major figures, such as Adam Davidson and Eric Nuzum, is another good example. *This American Life*, which Ira Glass negotiated into an independent status with control over sponsorship and many commercial relationships, is also widely noted.

Another challenge for adaptive behavior is that the public podcasting ecology is still protean. Public broadcasting, the core of the public podcasting ecology, lacks institutional mechanisms for research and development sites. The technology that fuels easy discovery and seemingly seamless consumption requires never-ending innovation, which is a challenge for underresourced public media. Public broadcasting's decentralization makes aggregated investment difficult, competition among rival services routine, and coordinated decision-making impossible. This is something all leaders in the area face as a reality, and something that has dogged public broadcasting from the start. Indeed, one wry definition among insiders of public broadcasting is "a series of meetings interrupted occasionally by a program." Nuzum bemoaned the risk-averse culture of public radio—of course bred by a concern for public money and scarce resources, but now also a cultural characteristic (Nuzum, 2018). PRX/PRI CEO Kerri Hoffman, one of the field's more outspoken leading executives, told us, "In the nonprofit world, people cling to stability. What have we done as an industry to groom our young leaders so they can take the mantle? Not very much. How do we invest in young talent?" (personal communication, February 15, 2019). She also signaled the need for experimentation, both in business models and in perpetual technology innovation: "You have to fail and be comfortable with prototyping, failing faster. That's not a culture that's alive and well in public media."

In an extensive 2019 study, news podcasters expressed similar concerns. Many of those interviewed

fear they could be helping platforms build profitable businesses on the back of their content. Others worry that they could lose their direct relationship with audiences, including first-party data, as platforms take the credit for content. Public broadcasters, in particular, are trying to develop their own destinations for audio content and a number have started to publish first in their own platforms or are withholding content altogether from third parties. (Newman & Gallo, 2019, p. 7)

### Public Podcasting Assets

Nonetheless, we believe the public podcasting ecology has assets and advantages, even in a big-player, platform world.

Content still matters, and that depends on both culture/mission and institutional resources. Public media podcasting benefits from the long-term public commitment to and investment in broadcast journalism. Many podcasts either started out (and continue) as broadcast programs or are incubated productively within a station or network with considerable journalistic assets. To give two examples, *Ear Hustle*, about life inside and after prison, and *On the Media*, about media and public life, are both unviable on their own from an advertising perspective. The audience is not large enough to generate enough advertising to cover all costs. But *Ear Hustle* also attracts donations and foundation support, promotes the Radiotopia network's image, and provides VIP opportunities for events (K. Hoffman, personal communication, February 15, 2019). *On the Media* is carried by many public media stations as a broadcast program, and it attracts donors and foundation money on its own (B. Garfield, personal communication, February 18, 2019). Stations are still getting over a fear of cannibalizing their audiences, but they increasingly see the synergies between the two forms of distribution.

Further, public media already has many journalistic partnerships that combine good journalism (e.g., ProPublica, Reveal) with public radio's reach, both broadly throughout the nation and deeply within communities. With organizations such as the *Washington Post*, *The Economist*, and Vox producing journalistic podcasts on the heels of *The Daily*, there are undoubtedly good opportunities for cobranding and partnerships.

Public podcasting also has higher-end advertiser appeal. Although public podcasting's upscale demographics may be minoritarian, they are also often otherwise hard to reach (Edison Research, 2019b). This is as true for *The Daily* and Slate's programs as it is for public broadcasting programs. Public-broadcasting-related podcasting in particular has brand recognition; this will continue to signal quality and civic responsibility that reflect a public-purpose mission, something that even a behemoth like Spotify cannot rival. This also has implications for the value proposition that can be offered to advertisers. It is not surprising that *The Daily*, a production of a for-profit company, is distributed for broadcast on public broadcasting.

Public podcasting's commitment to highly produced, well-crafted narrative, often from offbeat locales and sectors of society, also bodes well for another rising source of revenue: optioning for film or television productions. Vox, a digital publisher and podcaster, became an entertainment company in 2019 with its acquisition of Epic Magazine—a nonfiction producer that has a first look deal with 21st Century Fox and more than 40 film and TV projects in development. Meanwhile, Spotify's purchase of Gimlet Media was in part to secure Gimlet Pictures, which markets content to Hollywood producers (Andreeva, 2018). Amazon picked up the video rights to a Gimlet fictional psychological thriller, *Homecoming*, and turned it into an award-winning film of the same name. Another series, Bravo's true-crime *Dirty John*, started as a podcast created by Wondery and the *Los Angeles Times*. "The TV and film industry is finding a new goldmine of intellectual property in podcasting," iHeartPodcast Network President Conal Byrne told us. "The best and brightest creators in the world are able to operate with relatively total creative freedom, putting their ideas in front of audiences at scale. That's going to lead to some very good content, and Hollywood is taking notice" (C. Byrne, personal communication, September 16, 2019).

Finally, the very decentralization of U.S. public broadcasting, the set of institutions responsible for the development of the public podcasting ecology, may, ironically, work as a limited counterweight to the power of platforms. Public broadcasting at its base is a loose coalition of stations, each with a local constituency and board of directors, and with virtually guaranteed partial funding for core services from the federal government. Stations have long established a public presence, including brand awareness, in their local areas. They typically make a large minority or even majority of their operating revenue from area-level donations. The stations are bound to certain minimum obligations as users of the nonprofit portion of public spectrum, including an inability to sell assets to a for-profit entity. So long as public podcasting is associated with local stations and the entities that serve them, such as NPR and PBS, they maintain to some degree a separate sphere of influence and action from the hybrid platforms.

### Conclusion

Public-purpose podcasting has created a unique and uniquely valuable space of public discourse in the precommercial phase of podcasting. This space, we have argued, can productively be defined as a public podcasting ecology in the United States. Its recent success is at risk as hybrid platforms threaten to consolidate core functions in podcasting, including storage, discovery, and consumption. In the process, they also threaten the growing advertising revenue that fuels public podcasting's most interesting (and expensive) new productions, and they challenge the ability of a public podcasting culture to maintain itself.

We believe that understanding this ecology as distinctive and publicly valuable is important to maintaining it. Currently, although commercial and noncommercial partnerships exist, the ecology is more typified by competitive than collaborating actors. The risks to public life and the informational flow that sustains it, especially of platformization, are not part of public discussion in public podcasting, although they increasingly are being discussed by regulators in both the United States and Europe. In this process, public broadcasters may have a role to play. Public broadcasting is a set of organizations with deep roots in many U.S. communities, and, given both federal and (typically) state funding, it has an ability to raise concerns and opportunities with legislators and regulators.

We believe that the concept of public podcasting can fruitfully be extended beyond the U.S. podcasting ecology. Although the conditions of the public media environment vary greatly from region to region, the notion that trusted podcasts that abide by journalistic standards are a public asset can be applied cross-regionally.

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