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EDITORIAL TRENDS IN PODCASTS ON SPANISH ON-DEMAND AUDIO PLATFORMS
Strategies, Genres, and Differential Models

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ABSTRACT
This article analyses original podcast production during 2024 (330 titles) across the twelve main Spanish on-demand audio platforms. Employing a documentary methodology and a grid of 15 variables that serves as an operational taxonomy for the podcast industry, it identifies the dominant themes, genres, durations and publication structures, as well as the editorial identity of each platform. The results confirm the dominance of long-form conversational podcasts, the concentration of narrative formats on specific services, and the emergence of niche children's and cultural offerings that reveal the maturity of the Spanish market.

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1. Introduction: The Platformisation of the Podcast

More than two decades after its emergence, podcasting has established itself creatively and commercially as a new sonic strand of entertainment — global advertising revenue is projected to reach $5 billion in 2026, with an annual growth rate of 20% (Deloitte, 2025) — and has consolidated as a cultural industry with its own actors, dynamics, and distinctive attributes (Gallego, 2010; Moreno-Moreno et al., 2025; Sellas, 2011). The podcast has evolved from the amateurism of early digital communities to an organised model based on stable narrative standards and distribution and monetisation practices (Berry, 2016; Bonini, 2022). This evolution has broadened and diversified the expressive potential of spoken audio through proposals that found no place in traditional radio (Bonet y Sellas, 2022; Piñeiro-Otero y Pedrero-Esteban, 2022; Rime et al., 2022).

In this context of maturity, the podcast has become a mainstream audio format in which independent producers and media organisations converge within platform infrastructures (Pérez-Tornero, 2020; Srnicek, 2017; Sullivan, 2019; Zuboff, 2019;) that, in turn, operate in an ecosystem where audio mediatisation are increasingly determinant: "The technological processes of capture, production/editing, fixation or otherwise, on the one hand, and circulation and reception of sound texts, on the other, are traversed by diverse technologies, different business models and practices of cultural exchange" (Fernández, 2022, p. 6). The current moment is characterised by the full platformisation of audio: podcasts, audiobooks, and voice messages coexist in a hybrid, transmedia, and mobile environment that conditions the uses, durations, and structures of content (Jansson, 2018; Martínez-Costa & Legorburu, 2020).

This ecosystemic perspective reveals that audio formats compete and interact with other discursive languages — text, image, video — meaning that the podcast cannot be understood as "pure sound", but as a component within broader circuits of consumption and interaction. Mobility (active and passive) and individual headphone listening emerge as key factors in explaining why certain genres, durations, and publication modes are privileged over others. This underscores the significance of the role acquired by platforms — a term with computational, figurative, political, and architectural connotations (Bonet, 2024) — which function as environments for audio discovery that organise, make visible, and interpret the value of content (Paisana et al., 2024).

In the literature on cultural industries, the podcast occupies a transitional space between autonomous cultural creation and industrial production subject to criteria of profitability, standardisation, and corporate concentration. This process accelerated from 2018 onwards with the massive influx of capital from global platforms and large technology groups (Pérez-Alaejos et al., 2022), which fund exclusive productions, acquire networks and production companies, and transfer to audio business logics like those of on-demand audiovisual fiction (Pedrero-Esteban et al., 2024). The logic of this evolution rests on premises akin to those of video (Clares-Gavilán et al., 2019): on-demand audio services, under their discovery interface, become mechanisms for the appropriation and control of the sonic formats they host.

The case of the podcast in Spanish illustrates this tension clearly: on the one hand, independent production companies and amateur projects have proliferated; on the other, the influence of platforms, media outlets, and advertisers has grown, conditioning genres, themes, durations, and production rhythms, steering the medium towards an "audio industry" logic with increasingly complex value chains. In this context, actors such as Spotify, Audible, Podimo, or iVoox are no longer merely technical intermediaries but infrastructures that organise circulation, classify content, and define visibility, supported by highly determinant features such as algorithms.

Algorithmic classifications constitute a key interpretative lens for production decisions regarding originals, which seek to align with what recommendation systems and rankings deem most valuable or top performing (Karakayali et al., 2017). This role as discoverers and curators of podcasts transforms audio services into markets and editors, capable of promoting and reinforcing certain formats and genres (conversational, serialised, weekly frequency…) while relegating others with more experimental or niche thematic productions (Paisana et al., 2024).

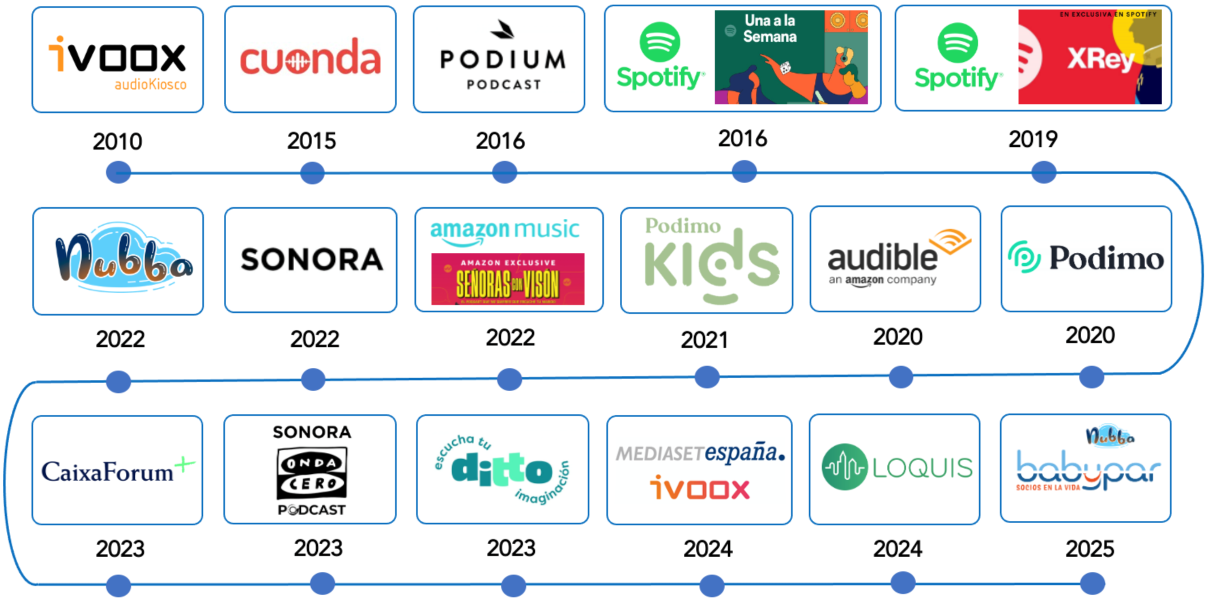
2. Evolution of Podcast Production in Spain

The creative evolution and commercial exploitation of podcasting have driven the publication of reports on its production and penetration in different markets. Alongside global data and consumption trends in countries with the most developed industries — Edison Research, Sounds Profitable, Cumulus Media, among others — academic studies describe the emergence of new sonic narratives (Lindgren, 2016; Martínez-Otón et al., 2022; McHugh, 2016; Rodríguez-Ortiz y Fernández-Sande, 2025; Ruiz-Gómez et al., 2023). In such works, it is observed that the podcast in Spanish has become established as a cultural industry with a diversity of titles, themes, and genres, albeit with clear territorial asymmetries.

Spain concentrates a very significant proportion of the actors in the Spanish-language audio ecosystem (Dosdoce, 2024) and exhibits high levels of production, driven primarily by international platforms and subscription operators. This trend is explained by the fact that the podcast economy remains lagged behind radio, audiobooks, or music streaming, with lower total revenues and strong dependence on advertising (PwC, 2024). The gap between audience volume and monetisation justifies the platforms' strategy of introducing subscription models, exclusivity, and original production as means of obtaining greater value per listener.

Fifteen years after the 2010 launch of the pioneering platform iVoox, originally conceived as an "audio kiosk" that allowed access to podcasts — mostly amateur — and radio programmes on demand (iVoox, 2025a), the Spanish market has witnessed the emergence of increasingly varied on-demand spoken audio offerings: Cuonda (2015), Podium Podcast (2016), Spotify (which premiered Una a la semana, its first original podcast, in 2018, and XRey, its first exclusive documentary, in 2019), Podimo (2020; in 2021 it launched the children's section Podimo Kids), Audible (2020), Amazon Music (which premiered Señoras con visón, its first original podcast, in 2022), Sonora (2022, although it closed a year later and its catalogue was incorporated into Onda Cero Podcast), Nubba (2022, integrated into Babypar in 2025), CaixaForum+ (2022), Ditto (2023), and Loquis (2024). In 2024, iVoox signed a strategic agreement with the audiovisual group Mediaset to boost the commercialisation of its podcasts (Figure 1).

Figure 1. Chronology of podcast platforms in Spain (2010-2025).

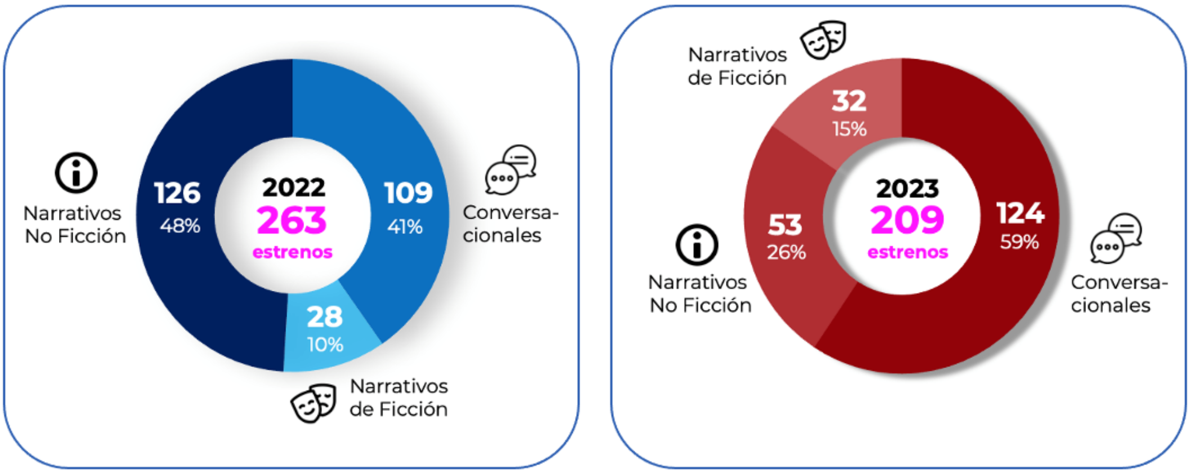


Source: Own elaboration, 2025.

The offering of original podcasts in Spain was dominated in 2022 and 2023 by foreign-managed platforms (Spotify, Podimo, Audible and Amazon Music), with the local player iVoox occupying a relatively minor position and the frustrated attempt by Sonora to gain a foothold in the subscription segment (Atresmedia, 2023). The predominant themes were articulated around the core formed by Culture, education and society, Health and wellbeing, and Leisure and entertainment, which together accounted for 47% of launches in 2022 and 54% in 2023. Podcasts on technology, music and sports remained at the lower end of the catalogue, with percentages ranging between 2% and 6% (ONE, 2023, 2024). This confirms the emphasis on an offering based on cultural dissemination, physical and mental care, and entertainment and escapism.

Regarding genres, the emergence of the subscription platform Sonora, whose catalogue was based on documentaries and audio fiction, positioned the percentage of non-fiction narrative podcasts (48%) above that of conversational ones (41%), a result that reversed in 2023 with the leadership of releases based on interviews, talks and discussions (Figure 2). In both years, fiction remained relegated to a minority percentage (between 10% and 15%). It should be noted that the production of this genre requires a high investment in scripting and recording and therefore tends to concentrate on specialised platforms and production companies. With respect to durations and publication rhythms, the reports reveal that in 2022 and 2023 episodes did not exceed an average of 40 minutes, with some exceptions in the iVoox repository.

Figure 2. Distribution by genre of podcasts released by platforms in Spain.



Source: Observatorio Nebrija del Español, 2023 and 2024.

Up until now, the revenue models in podcasting can be grouped into four broad formulas: advertising, direct listener contributions, mixed schemes, and closed or premium models based on subscription. In Spain, both in 2022 and 2023, two-thirds of launches were published exclusively on subscription platforms (Podimo, Audible, Sonora), which reduced the presence of advertising and reinforced the role of catalogue exclusivity as a monetisation strategy.

Regarding the editorial profile, we are witnessing the coexistence of generalist platforms — iVoox, Spotify, Podimo, Podium Podcast, Cuonda, or Amazon Music — with others specialised in genres — the case of Audible and its almost exclusive catalogue of audiobooks and audio fiction — and some that focus on thematic or audience niches. In this category are Ditto and Babypar, dedicated to the children's target (Martín-Nieto et al., 2025); CaixaForum+, with a cultural and scientific focus (Casas, 2022); or Loquis, with geolocated podcasts for tourists (EPT, 2024). To these are added services dedicated to audiobooks — another on-demand digital audio format with an increasing number of operators in Spain (Magadán Díaz & Rivas-García, 2020) — which occasionally produce non-fiction narrative podcasts or audio fiction; this is the case of Storytel (with original series such as Menlo Park, La suelta, or Modo Noche) or Planeta de Libros.

Each of these platforms operates from differentiated models of access and monetisation; this diversity distributes the audience according to interests, purchasing power, and consumption habits, and forces producers to make strategic decisions about distribution windows, exclusive catalogue, and presence (or absence) on multiple aggregators. This context shapes the analysis of the podcasts launched during 2024 by the platforms competing in the Spanish market and should be read as evidence of the maturation of the various models and the search for competitive advantages against generalist and niche rivals.

This work aims to identify and gauge the evolution of editorial trends (themes and genres, durations and production structures) taking as reference the launches on the main platforms that released at least one podcast in 2024: Amazon Music, Audible, Babypar, CaixaForum+, Cuonda, Ditto, iVoox, Loquis, Planeta de Libros, Podimo, Podium Podcast, and Spotify. To achieve this general objective, three specific objectives have been defined:

OB1: To consolidate categorisation criteria for a systematised analysis of podcasting in Spanish based on the study of titles launched in the selected period.

OB2: To conduct an exhaustive analysis of the contents and profile of the platforms' production to describe the differential editorial identity of these entities in the Spanish podcast industry.

OB3: To consolidate an analysis matrix that enables all actors involved in the industry — creators, producers, distributors, and marketers — to recognise and value the original podcast production in narrative and expressive terms.

3. Methodology

The study is grounded in a qualitative documentary research methodology that has been validated in previous works (ONE, 2023, 2024; Pedrero-Esteban et al., 2024), through which the data under investigation are collected, selected, and systematised. In an initial exploratory phase, podcasts premiered for the first time or as new seasons between 1 January and 31 December 2024 were extracted and located. To ensure their relevance, contact was made with the responsible parties at the twelve platforms that constitute the sample —all those that released at least one title during the indicated period— to confirm their correspondence with the defined criteria.

The lists provided by the platforms were cross-checked against the extraction carried out by the research team, because of which some references were discarded either because the premiere date fell before 1 January 2024 or because the content did not consist of podcasts but audiobooks. As a result of this initial sample collection phase, 330 original titles premiered in 2024 by the twelve main platforms were validated, equivalent to approximately 11,536 hours (692,190 minutes) of production (Table 1).

Table 1. Description of the sample.

Platforms	Titles	%	Episodes	Minutes
Amazon Music	2	0,6	7	360
Audible	29	8,8	372	9.167
Babypar	6	1,8	60	270
CaixaForum+	7	2,1	57	1.812
Cuonda	6	1,8	36	1.317
Ditto	3	0,9	9	84
iVoox	129	39,2	8.388	577.266
Loquis	7	2,1	133	399
Planeta de Libros	1	0,3	9	270
Podimo	80	24,3	1.405	56.724
Podium Podcast	56	16,7	846	41.247
Spotify	4	1,2	499	3.274
Total	**330**	**100%**	**11.821**	**692.190**

Source: Own elaboration, 2025.

It should be noted that the titles released by ten of the twelve platforms are exclusive, meaning they can only be listened to in their respective repositories, either openly or by subscription; only the podcasts produced by Podium Podcast and Cuonda are available on other catalogues. There are some series from Babypar or iVoox Originals (those included in the analysed sample) whose first chapter or initial minutes of each episode can be listened to on other platforms: this is a promotional and audience-acquisition strategy to enable listeners to discover and access the full content within the service that hosts it in its entirety.

To delimit the information relating to the 330 units of analysis and describe it in a conceptual and systematic manner, criteria of similarity and differentiality were established (Cisterna-Cabrera, 2005) based on two types of parameters: a) production-related and b) content-related. This breakdown made it possible to define heuristic categories and variables of analysis, that is, ones with significant and relevant informational weight (Rojas, 2010). The identification of these categories resulted in a matrix comprising 15 analysis variables and 62 subvariables (Table 2).

Table 2. Variables and categories established for the analysis of the sample.

Nº	Variables	Categories		
		Block I. PRODUCTION		
Nº	**Variables**	**Categories**		
1	Podcast title			
2	Platform	1= Amazon Music 2= Audible 3= Babypar 4= CaixaForum+	5= Cuonda 6= Ditto 7= iVoox 8= Loquis	9= Planeta de Libros 10= Podimo 11= Podium Podcast 12= Spotify
3	Co-producer (name)			
4	Gender in management	1= Male 2= Female 3= Both 4= Not stated		
5	Gender of lead voice	1= Male 2= Female 3= Both 4= Choral delivery		
6	Type of release	1= New release 2= New season 3= Always on		
7	Number of episodes			
8	Total duration in minutes			
9	Average duration			
10	Duration in time slots	1= Between 1' and 14 2= Between 15' and 29	3= Between 30' and 59 4= 60' and over	
		Block II. CONTENT		
Nº	**Variables**	**Categories**		
11	Themes	1= Journalism/current affairs 2= Mystery/thrillers 3= Leisure and entertainment 4= Culture, education and society 5= Health/physical or mental health/well-being 6= Lifestyles 7= Comedy and humour	8= Economics and business 9= Technology 10= Sports 11= Music 12= Children's 13= Fiction 14= Feminism	
13	Genre	1= Conversational 2= Narrative non-fiction 3= Narrative fiction		
13	Subgenre Conversational	1= Interviews 2= Colloquium/Talk Show	3= Monologue	
14	Subgenre Narrative non-fiction	1= Reportage 2= Documentary 3= True Crime 4= Essay	5= Daily news 6= Personal development 7= Audio-article 8= Other	
15	Sub-genre Narrative fiction	1= Audio series 2= Audio film 3= Literary adaptation 4= Audio story	5= Audio drama 6= Audio novel 7= Other: which one?	

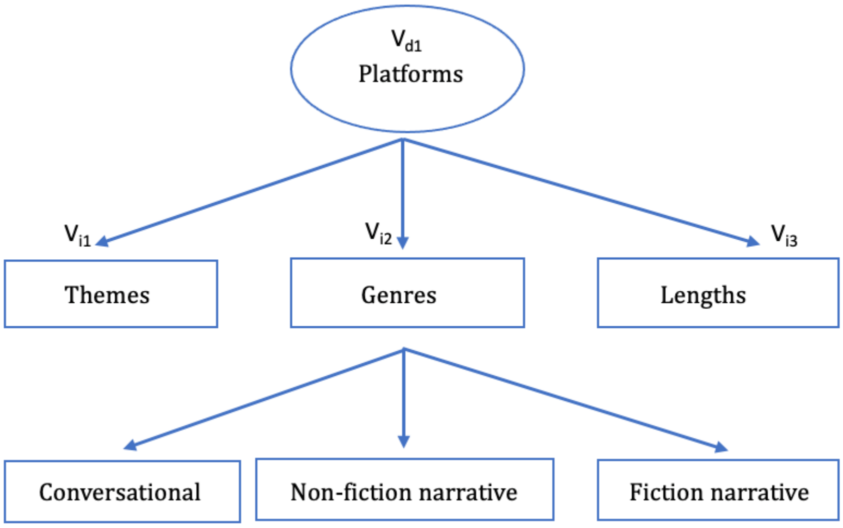
Source: Own elaboration, 2025.

The categories and variables collected in the matrix allow for the definition of a taxonomy of the Spanish-language podcast that considers seriality, duration, themes, genres, and models of distribution and/or commercialisation, among other systematizations. For the creation of the database and the analysis of results, the following tools were used: in the initial data collection phase, matrices created in Excel; and in the second phase, the statistical package IBM SPSS Statistics version 28.

4. Results

The presentation of the results is structured around two consecutive phases of analysis to facilitate the interpretation of the data: 1) analysis of the basic descriptive, which enable a quantitative reading of the themes, genres, and subgenres; and 2) analysis of the correlations between the variables "platforms" and "themes", "genres" and "durations" through contingency tables, the most suitable statistical tool for detecting interactions between the different variables. Figure 3 shows the correlation matrix established from the dependent variable (Vd1) and the independent variables (Vi1, Vi2, Vi3).

Figure 3. Matrix of correlations analysed in the contingency tables.



Source: Own elaboration, 2025.

4.1. Production According to Basic Descriptive: Themes, Genres, and Subgenres

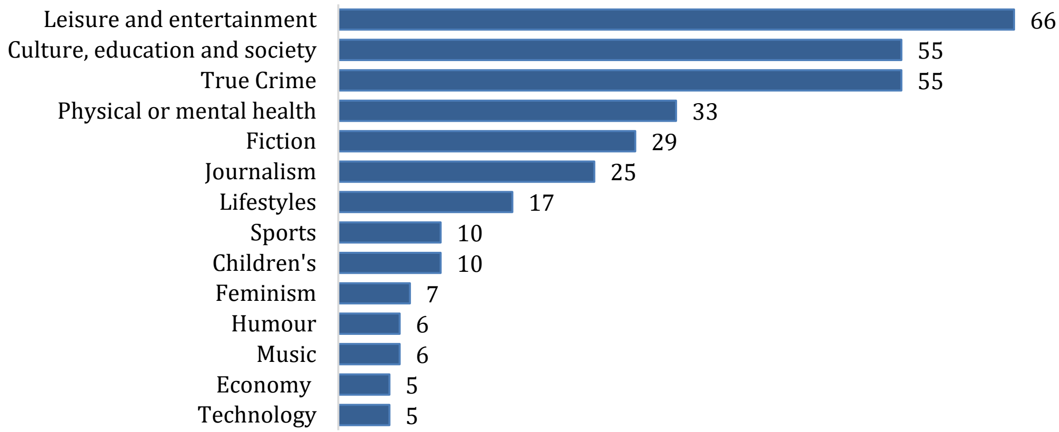
The first phase of the descriptive analysis provides a highly revealing snapshot of the current weight of platforms in the Spanish podcast industry. Regarding the distribution of production, the existence of two clearly differentiated blocks is confirmed. On one hand, there are four generalist operators with a long track record in the market: two national and two internationals. The Spanish platform iVoox, with 39.2% of launches (n=129), was the most prolific in 2024, followed by the Danish-owned Podimo with 24.3% (n=80), the also national Podium Podcast with 16.7% (n=56), and the local division of the American Audible with 8.8% (n=29).

In the other block are the remaining eight entities, at a considerable distance in terms of the number of titles launched: Loquis, 2.1% (n=7); CaixaForum+, 2.1% (n=7); Cuonda, 1.8% (n=6); Babypar, 1.8% (n=6); Spotify, 1.2% (n=4); Ditto, 0.9% (n=3); Amazon Music, 0.6% (n=2), and Planeta de Libros, 0.3% (n=1). Of these eight platforms, three are subsidiaries of transnational companies (the Swedish Spotify, the Italian Loquis, and the American Amazon Music), while the other five are Spanish owned (Cuonda, CaixaForum+, Babypar, Ditto, and Planeta de Libros).

It is therefore confirmed that nearly two-thirds of the podcasts launched in 2024 (208 titles, 63%) were produced by local entities (iVoox, Podium Podcast, CaixaForum+, Cuonda, Babypar, Ditto, and Planeta de Libros), compared with 122 (37%) driven by foreign-capital services. In relation to previous years, three divergent trends are observed among the external actors: while the Danish Podimo continues to increase its commitment to original production in the Spanish market (58 titles in 2022, 70 in 2023, and 80 in 2024), Audible has slowed its pace (37 in 2022, 34 in 2023, and 29 in 2024), and Spotify — following the company's global guidelines (Alonso, 2025) — has significantly reduced its investment in exclusive podcasts (from 17 launches in 2022 to 8 in 2023 and only 4 in 2024, a 76% drop over three years).

With respect to podcast themes, the sample reflects a highly varied distribution across the fourteen categories defined by the matrix (Figure 4). As was the case in the 2022 and 2023 measurements, titles on Leisure and entertainment (20.1%) and Culture, education, and society (16.7%) rank among the most recurrent. However, in third place — relegating Health and physical/emotional wellbeing to fourth — appear podcasts on Mystery and true crime (16.7%), which include content on murders, kidnappings, unusual phenomena, and paranormal events. At the lower end remain titles on technology and music (1.5%), while those aimed at children rise (3%) due to the emergence of two platforms focused on this audience segment (Ditto and Babypar).

Figure 4. Distribution of the premieres in the sample by theme.



Source: Own elaboration, 2025.

To categorise the production of the platforms according to podcast genres, reference has been made to the taxonomy developed in various academic works (Arense-Gómez *et al.*, 2019; López-Villafranca y Olmedo-Salar, 2020; McHugh, 2016; Rodríguez-Ortiz y Fernández-Sande, 2025) and recognised and applied by the industry itself, in which three main expressive variants are distinguished: conversational podcasts (discussions and talks, interviews or monologues); non-fiction narrative podcasts (documentaries, news/informative programmes, true crime, reportage, essays and personal development spaces), and fiction narrative podcasts (audio series, sound films, audio theatre, audio novels, audio short stories and literary adaptations).

Analysis of the original podcast production on the twelve platforms that constitute the sample reveals the overwhelming dominance of the conversational genre, to which almost three-quarters (73.3%) of the 2024 launches belong (242), with the following distribution: 40% talk- and discussion-based shows, 19% interviews and 14% monologues (those in which the host addresses the listener directly). Among non-fiction narrative podcasts, which barely exceeded 16% of the titles published, the most produced subgenre was reportage (15), followed by true crime (12), documentary (11), news/informative (6), personal development podcasts (6) and essays (2). Finally, audio fiction accounted for one-tenth (10.6%) of the production, consisting mainly of audio series (21) and audio short stories (12), with a smaller presence of literary adaptations (2) and sound films, that is, single-episode fiction (1) (Table 3).

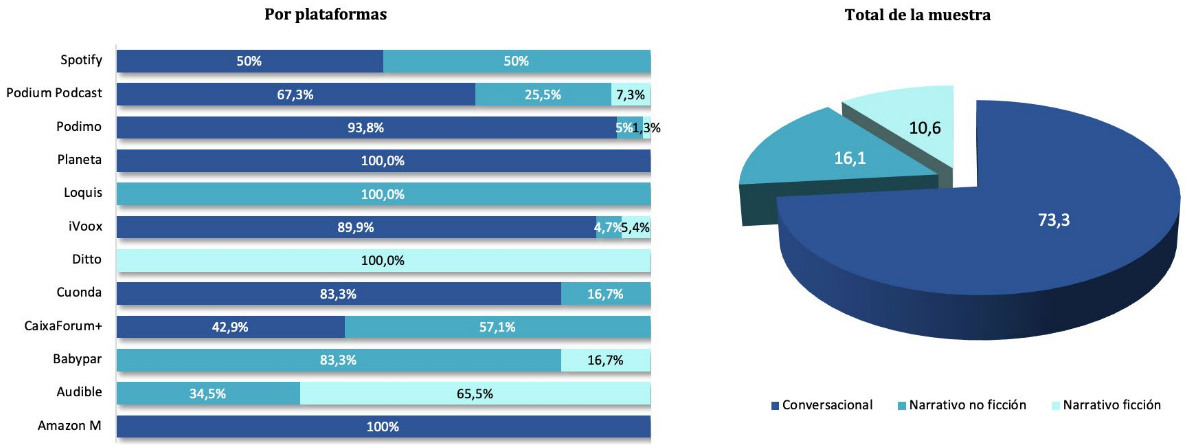
Table 3. Basic descriptions of genres and subgenres.

Genres	Subgenre	Titles	Percentage
Conversational		**242**	**73,3%**
	Interview	63	19,1%
	Talk/Discussion	133	40,4%
	Monologue	46	14,0%
Narrative non-fiction		**53**	**16,1%**
	Reportage	15	4,6%
	True Crime	12	3,6%
	Documentary	12	3,6%
	News	6	1,8%
	Personal development	6	1,8%
	Essay	2	0,6%
Narrative fiction		**35**	**10,6%**
	Audio series	20	6,1%
	Audio story	12	3,6%
	Literary adaptation	2	0,6%
	Audio film	1	0,3%

Source: Own elaboration, 2025.

A detailed analysis of the production reveals strikingly unequal proportions in the distribution of genres among the titles launched by each platform in 2024, particularly on those that released a significant number of podcasts (Figure 5). Only three of the twelve catalogues include content from all three narrative variants: Podimo, Podium Podcast and iVoox. However, in all three cases conversational content proved dominant (67% on Podium Podcast, 89.9% on iVoox and 93.8% on Podimo), while audio fiction remained minimal (7.3%, 5.4% and 1.3% respectively).

Figure 5. Distribution of genres in the total sample and by platform.



Source: Own elaboration, 2025.

Among the entities that launched three or more titles — almost all, except Amazon Music: 2 and Planeta de Libros: 1 — two focused on podcasts of a single genre; one was Loquis, dedicated to tourist dissemination, a purpose materialised through reportage (a non-fiction narrative subgenre); the other was Ditto, which aims to attract the children's audience with stories and tales of fiction. The podcasts launched by the remaining five platforms combined two genres: conversational and non-fiction narrative in Spotify (50% and 50%), CaixaForum+ (43% and 57%) and Cuonda (83% and 17%); and non-fiction narrative and fiction in Babypar (83.3% and 16.7%) and Audible (34.5% and 65.5%). A comprehensive reading of the figures shows that the generalist and open-access platforms — Podium Podcast, Amazon Music, iVoox and Cuonda — dedicated more resources to producing conversational podcasts, while the niche and subscription services — Audible, Babypar and Ditto — generated or expanded a menu of contents more demanding and coherent in substance and form (themes and narratives) with the profile of the listener they target.

These data highlight the level of maturity of the digital audio market in Spain and confirm the editorial strategies in subscription entities: Audible (with high-quality fiction and non-fiction narrative titles), Podimo (with conversational shows hosted mostly by well-known influencers), Babypar and Ditto (with stories and educational spaces designed for the children's audience), as well as those in niche platforms: CaixaForum+ (with dissemination and cultural podcasts) and Loquis (with geolocated tourist podcasts).

With regard to generalist platforms, the data on genres, which entail an unavoidable economic demand (the production costs of fiction and non-fiction narrative podcasts are usually higher than those of interviews and discussions), accentuate the shift towards conversational titles already detected in 2023, which in 2024 accounted for half of the launches on Spotify, two-thirds on Podium Podcast, and almost 9/10 on iVoox. This evolution is better understood when combining the different variables of this research, the subject of the following analysis.

4.2. The Editorial Identity of Catalogues According to Platforms

The second phase of the study, structured around contingency tables, enables a more in-depth description of the editorial profile of the production on Spanish podcast platforms through the interrelationship between the variables on themes, genres, and durations (Figure 1). First, Table 4 reproduces the cross-tabulation of the variables "platform" (Vd1) and "theme" (Vi1): through a 'heat map', the representation of each entity's titles in the 14 categories defined in the matrix is compared with the overall set of launches published in 2024.

Dark orange has been used to mark the lowest values, light orange for small values, yellow — in light and intense tones — for intermediate values, and green for the highest. This gradation corresponds to the level of thematic variety in the titles launched on each platform: orange symbolises the greatest breadth, while, at the opposite extreme, green indicates maximum specialisation.

In line with what has already been noted regarding genres, the platforms that offer the greatest thematic variety in their launches are iVoox, Podimo and Podium Podcast, while those with the least diversity are Babypar and Ditto — targeted at children —, Loquis — with podcasts on lifestyles (travel) — and Planeta de Libros — a particular case, as it is an audiobook platform that in 2024 published a single cultural podcast.

Another relevant correlation arises from the association between the variables "platform" (Vd1) and "subgenres" (Vi2), where the narrative offering of each platform is much more clearly delineated (Figure 6). The entities whose offering is flattest are Planeta de Libros and Amazon Music, exclusively conversational in genre (interview podcasts), as well as Loquis, whose seven launches were non-fiction narrative titles materialised in the reportage subgenre. A reduced colour variety is also observed in Spotify: of its four launches, the two non-fiction narrative ones are daily news bulletins (the journalistic *AM* and the cultural *Esta no te la sabes*), and the two conversational ones — seasons 4 and 5 of *El podcast de Marian Rojas Estapé* — correspond to monologues by the psychiatrist specialist.

Table 4. Contingency table and heat map for the variables: platform and themes**.**

1= Journalism/current affairs; 2= Mystery/business; 3= Leisure/entertainment; 4= Culture, education, and society; 5= Health and well-being; 6= Lifestyles; 7= Comedy and humour; 8= Economy and business; 9= Technology; 10= Sports; 11= Music; 12= Children; 13= Fiction; 14=Feminism.

Platform		Podcast Themes													
		1	2	3	4	5	6	7	8	9	10	11	12	13	14
Amazon Music	% on platform			50			50								
	% in theme			1,5			5,9								
Audible	% on platform	10,3	13,8		3,4	6,9								65,5	
	% in thematic	12	7,3		1,8	6,1								65,5	
Babypar	% on platform												100		
	% in thematic												60		
Caixa Forum+	% on platform				42,9							57,1			
	% in subject area				5,5							66,7			
Cuonda	% in platform				16,7	33,3			16,7						
	% in thematic				1,8	6,1			20						
Ditto	% in platform												100		
	% in thematic												30		
iVoox	% on platform	8,5	30,2	18,6	17,8	7	5,4	0,8	1,6	3,1	3,1			3,9	
	% in thematic	44	70,9	36,4	41,8	27,3	41,2	16,7	40	80	40			17,2	
Loquis	% on platform						100								
	% in thematic						41,2								
Planet Books	% on platform				100										
	% in subject area				1,8										
Podimo	% on platform	5	12,5	40	15	15	1,3	2,5	1,3				1,3	1,3	5
	% in subject area	16	18,2	48,5	21,8	36,4	5,9	33,3	20,0				10	3,4	57,1
Podium Podcast	% on platform	10,9	3,6	12,7	23,6	10,9	1,8	5,5	1,	1,8%	10,9	3,6		7,3	5,5
	% in thematic	24	3,6	10,6	23,6	18,2	5,9	50	20	20	60	33,3		13,8	42,9
Spotify	% on platform	25			25	50									
	% in thematic	4,0			1,8	6,1									

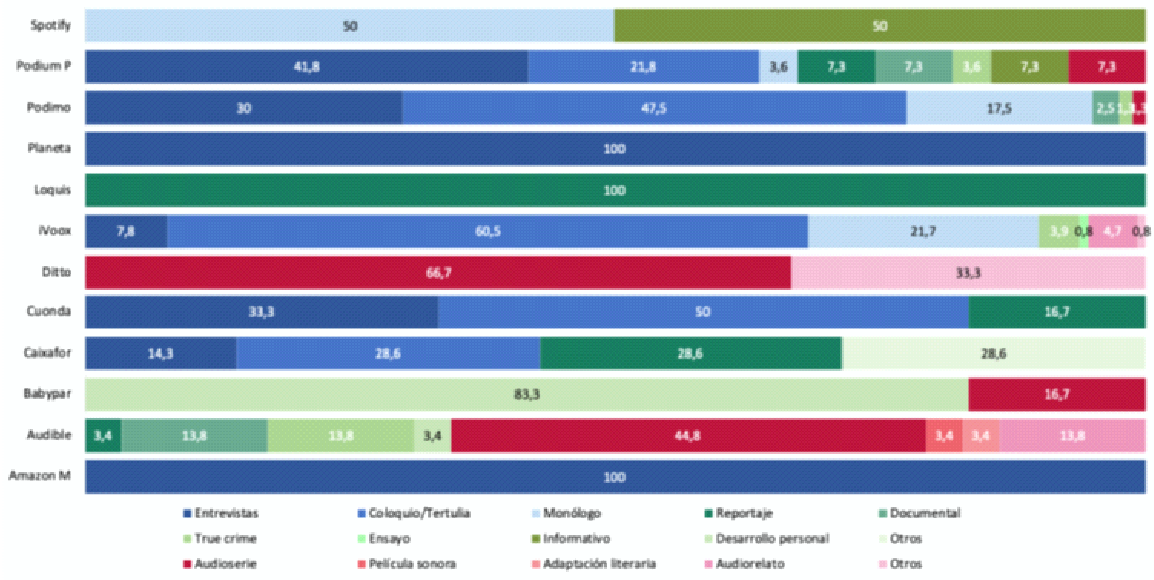
Source: Own elaboration, 2025.

In the two children's content platforms, no more than two different subgenres are observed: audio series (2/3) and literary adaptations (1/3) in Ditto, and educational programmes (83%) and audio series (17%) in Babypar. This finding reveals two distinct editorial approaches for the same target audience. The first — Ditto — offers a pedagogical proposal based on escapism through audio stories: "Audio, without images, helps brain development and learning, because when information arrives only through the ear, the brain compensates by imagining" (Martín-Nieto et al., 2025: 516). As for Babypar, its catalogue of fiction is combined with podcasts focused on promoting routines and healthy habits:

“Short stories, sound effects, fun dialogues and practical advice that become a useful tool for families wishing to teach good habits to their children, and for teachers, educators and child health professionals” (Babypar, 2025).

At the opposite extreme, the platforms with the greatest expressive variety are the open-access generalist Podium Podcast and the subscription-based thematic Audible; both launched podcasts across up to eight subgenres during 2024. In the former, releases spanned all three major genres — conversational, non-fiction narrative and audio fiction — although the overwhelming majority fell within interviews (42%) and discussions (22%), well ahead of reportage, documentaries, news/informative programmes, and audio series (7.3% in each case). Among the four titles in this last variant are *Gemelos digitales*, *La Quiebra*, *Titania 2* and *Unleashed* (the English version of the first season of Titania, an example of the international potential of sound productions created in Spain). In the case of Audible, nearly half of its 29 launches (44%) were audio series, although literary adaptations, documentaries and true crime podcasts also carried notable and balanced weight (14% in each case). Finally, at 3.4% of the total percentage, reportage, personal development spaces and literary adaptations were also launched.

Figure 6. Distribution of sub-genres by platform in total percentages on each platform.



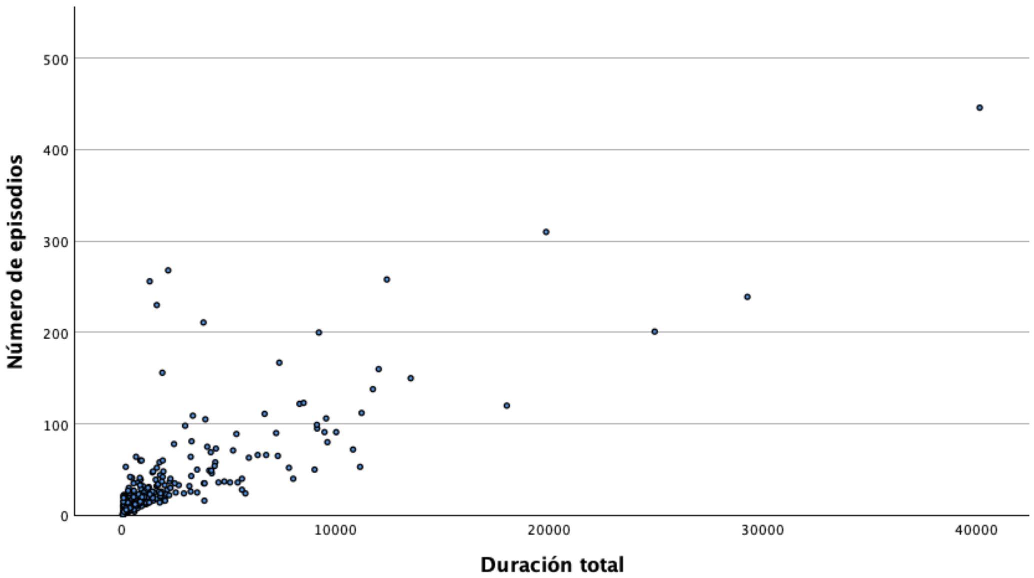
Source: Own elaboration, 2025.

To complete the matrix of correlations analysed, we reviewed the numerical variables of the study: total duration, average duration, and number of episodes. The variable total duration, recorded in minutes, yields the following descriptive: M = 2,085.66; SD = 4,075.94; Min = 8; Max = 40,140. The average duration per episode, also in minutes, gives: M = 53.11; SD = 38.73; Min = 3; Max = 240. Figure 7 shows the dispersion of the variables ‘number of episodes’ and ‘total duration’; the scatter plot presents the relationship between ‘total duration’ (horizontal axis) and ‘number of episodes’ (vertical axis), allowing analysis of the distribution pattern, concentration, and variability of the observations.

First, a high concentration of points is observed in the lower-left quadrant, indicating that most podcasts launched in 2024 were productions with relatively low total duration and a reduced number of episodes. This pattern suggests a strong positive asymmetry in both variables, with greater density of cases at low values and dispersion increasing as total duration grows. Second, the overall flow of the cloud shows a weak to moderate positive trend: as total duration increases, the number of episodes tends to rise, although this relationship is not linear. Vertical dispersion widens for higher values, indicating heteroscedasticity, that is, greater variability in the number of episodes for longer durations.

In addition, several outliers are identified that are very distant from the main body of the sample. Notable cases include titles with an exceptionally high number of episodes for moderate durations, as well as titles with extremely long durations and a high number of episodes. These points suggest the existence of formats (such as daily broadcast podcasts or those with prolonged duration) that do not follow the dominant pattern of the offering; this is the case of *Universo de misterios* (446 episodes), *Días extraños* (310), *La contracrónica* (258), *El canal del coronel* (201) or *Cuarto milenio* (200), all on iVoox. The same occurs with Spotify's two exclusive daily programmes: *Esta no te la sabes* (256) and *AM* (230). Overall, the dispersion flow evidences a non-linear positive relationship, dominated by a high concentration of observations in low ranges and the presence of outliers that influence the overall structure of the distribution. This behaviour suggests that the number of episodes does not depend solely on total duration but is conditioned by other structural format factors.

Figure 7. Scatter plot: "number of episodes" and "total duration".



Source: Own elaboration, 2025.

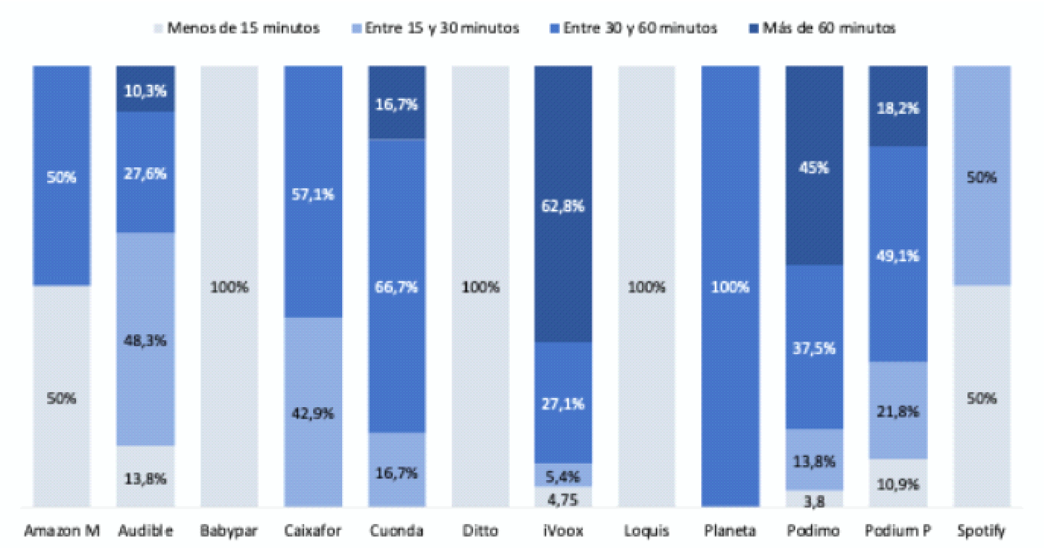
Finally, for a deeper understanding of the launches on audio platforms in 2024, we present the correlational analysis of the variable "platform" (Vd1) and "total duration", which was recoded into the variable "duration" (Vi3); this allowed the use of this numerical variable as categorical and its correlation with the full set of platforms. The descriptive for the new variable (N=330) were as follows: 11.6% of launches fell into the duration category "under 15 minutes"; 15.2% in "between 15 and 30 minutes"; 33.4% in "between 30 and 60 minutes"; and finally, the largest percentage of launches, 39.8%, in "over 60 minutes". In other words, nearly three-quarters of the titles launched (73.2%) had an average duration exceeding half an hour.

To understand how these durations are distributed across each platform, Figure 8 reflects the correlation that, in many cases, these lengths maintain with the genres and audiences they target. This is the case for Babypar, Ditto and Loquis, whose catalogues have proven to be highly constrained in themes and genres; they are likewise constrained in episode length: stories, reportage and educational content designed for children or for listeners on the move (tourists), that is, with expectations or listening contexts that are brief (under 15 minutes). The same occurs with Spotify's dailies *Esta no te la sabes* and *AM*, and Podimo's *La vuelta al día*, conceived as brief daily recaps of news or events.

At the opposite extreme are the conversational podcasts, which are usually lengthy: in the iVoox catalogue, where they account for 90% of the 2024 launches (Figure 5), nearly two-thirds of episodes last more than 60 minutes; in Podimo, with 93.8% of titles based on discussions and interviews, nearly half (45%) exceed that duration, and more than a quarter (27%) fall between 30 and 60 minutes. In Podium Podcast, two-thirds of launches exceeded half an hour, while in Audible, a platform focused on fiction and non-fiction narrative podcasts, nearly two-thirds of episodes (62%) remain below 30 minutes.

Beyond their length, these data highlight the inverse relationship between production costs and the final duration of podcasts: the higher the budget and technical complexity in planning, recording and editing the titles, the shorter the duration of each episode, particularly in fiction narrative works (audio series and literary adaptations, mainly).

Figure 8. Distribution of time slots by platform in percentages.



Source: Own elaboration, 2025.

5. Conclusions and Discussion

The historical trajectory of podcasting confirms that an ecosystem originally built around amateur communities, and an open RSS-based architecture has evolved into an industry increasingly structured by platforms that now concentrate functions of storage, discovery, and consumption (Sullivan, 2019). This transition, encompassed within the global process of platformisation (Zuboff, 2019), explains why actors such as Spotify, Apple, Amazon, or Google (through YouTube) have moved from being mere aggregators to gatekeepers that capitalise on audience data and steer production towards increasingly scalable and profitable formats.

Within this framework, the case of Spotify illustrates in a revealing way the strategic shift of major platforms: following a phase —from 2019 to 2023— of heavy investment in exclusive content and the acquisition of studios and specialised companies (Terol Bolinches et al., 2021), the Swedish company reoriented its global strategy towards promoting conversational podcasts available on other services, while incorporating video to maximise reach within its own interface and increase consumption time and cross-screen reuse (Alonso, 2025). The study of production on Spanish platforms in 2024 confirms this shift by showing how original catalogues align with this logic of discovery and intensive consumption rather than with the production of singular, high-narrative-cost works.

Indeed, the data reveal that after a period dominated by subscription services with exclusive offerings and strongly curatorial catalogues (Audible, Podimo, Sonora), the centre of gravity of the market is shifting towards generalist platforms that prioritise mainly conversational products, with low unit cost and long durations. This trend coexists with the emergence of smaller operators with much more constrained strategies in terms of audience and positioning: children's on-demand audio services such as Ditto and Babypar, apps with geolocated podcasts for tourists such as Loquis, or cultural and educational proposals such as CaixaForum+. Although these actors remain modest in terms of listening share, they reflect a greater maturity of the market, where sustainability depends on subscriptions and highly segmented advertising that capitalises on compact communities rather than mass audiences. Both paths — generalist and specialised catalogues — maintain the pursuit of viable monetisation models and editorial formulas with recognisable identity amid oversupply, the rise of video podcasts and YouTube as a major competitor.

On this terrain, an increasingly clear distinction is intensifying between two narrative categories: narrative podcasts (fiction and non-fiction) and conversational podcasts. More than twenty years after the format's emergence, this is already the most visible boundary both in listener expectations and in industrial organisation, enabling platforms to plan and distribute differentiated catalogues based on genres, durations, publication rhythms and consumption modes, in a manner analogous to on-demand audiovisual OTT services. Experts predict the imminent emergence of the 'HBO of podcasting': "It will not be another appropriation of territories for celebrities, nor a half-hearted paywall, nor a warehouse of licensed content, but something with a clear intention and a point of view" (NiemanLab, 2025).

Academics and professionals reinforce this duality by proposing the division between storycats (narrative podcasts with high production demands, limited serial publication and openness to transmedia exploitation) and chatcats (recurrent long duration talk programmes whose appeal lies in the personality of the participants). Eric Nuzum, iconic creator, and producer and one of the most authoritative voices in the industry, considers it necessary to rethink the denomination of podcasting and has proposed this classification adjusted to the two dominant narrative forms (The Audio Insurgent, 2025). The recent decision by Amazon to integrate Wondery — a production company linked to major fiction and non-fiction narrative series — under the structure of Audible confirms this axis by positioning storycat production as a strategic premium catalogue bet within a subscription service oriented towards long-form, high-perceived-value audio (Forbes, 2025).

The editorial trends identified in original podcast production in 2024 can also be read considering consumption and monetisation data for 2025: according to the iVoox Observatory, intensive users — those who listen for more than ten hours per week — choose content on mystery, history, and humour, and show great tolerance for advertising when they perceive it as relevant and close to their interests (iVoox, 2025b). However, the weight of podcasting in digital investment remains reduced, which pushes major platforms to seek scalability through broad catalogues of conversational titles and to reserve high-cost narrative projects for cases with potential for multi-platform exploitation or strategic alliances. This is shown by recent moves by Netflix, which has signed agreements with Spotify and iHeartMedia to produce and distribute video podcasts based on its franchises and original content from 2026 (Gorka Zumeta, 2026). This move evidence another effect of the platformisation of audio: the bet on conversational titles with video displaces consumption towards new devices (connected televisions) and spaces (the living room), completely redefining the original attributes of mobility, individuality, and intimacy on which the listening experience associated with this medium was originally based.

The findings of the study ultimately confirm the relevance of podcast platforms as prescribers and generators of trends in the spoken digital audio ecosystem, a role already established in music thanks to algorithmic direction of listening (Pedrero-Esteban et al., 2019; Beltrán-Peña, 2022; Pérez-Ríos, 2024). The recommendation systems of these services condition the diversity and perceived value of sonic content; in the case of podcasts, it has been established that mid-range serendipity, clipable pieces, the video-to-audio itinerary and fine-grained control over listening suggestions are determinant for young people — particularly Generation Z — to perceive the format as distinct from background music or linear audiobooks (Iturralde & Lloret, 2025).

This trend reinforces the importance of fully understanding the narrative and expressive nature of the podcast — especially the articulation between chatcats and storycats — to design differentiated creation and distribution strategies in an environment where these audience targets expect explainability, agency and diverse catalogues, while at the same time valuing convenience and minimal friction. The podcast today stands as a central piece in a fully platformised sonic ecosystem, whose evolution will depend on how the industry manages the balance between scale, diversity, and narrative singularity.

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