

Exploration on the Future Development Path of Chinese Podcast^{*}

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When Chinese podcast experienced a short period of rapid development in the first year and entered the “cooling-off period”, there are so many new exposed problems that need to be solved. In this paper, the author will explore the problems existing in the current development of Chinese podcast from six macro perspectives, as well as the possible trend of future podcast development.

Keywords: Chinese podcast, audio market, ear economy

Preface

Podcasts, which used to be marginalized by capital to be developed, have attracted more and more creators and become a new target for Internet giants. 2020 is a year of explosive development of Chinese podcasts, but also a year of crazy capital influx from a large number of Internet giants. According to the 2021 Chinese Podcast Creators Report, 40.5 percent of new podcasts appeared in 2020, which is about four times the total of the previous four years. 89 percent of podcasts were released during 2020 and 2021, and the annual downloads of podcasts increased 3.3 times from 2019. As a result, the year of the simultaneous explosion of listeners and programs is also known as the first year of the Chinese Podcast.

In this year, the Chinese podcast market has earthshaking changes. Not only has it launched the first batch of independent podcast platforms in China, such as the Small Universe, Kayak but also the three giants of the China’s audio market (Lychee, Himalayan, Dragonfly FM) and established music streaming media platform (QQ music, NetEase cloud music, and so on) also have joined the new blue ocean of podcast, and developed their own podcast business. Podcasts have long been seen as niche content ecology ushering in a battle for capital in the “ear economy” field.

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After the boom of Chinese podcasts in the first year, it is entering a “calm period” at a visible speed. How to make Chinese podcast embrace the opportunity is like “turkeys fly in a hurricane”, the author thinks that it can be carried out from the following six aspects, decentralize the platform, establish podcast in the main body position in the audio market, reduce the creator content production cost, solve the problem of platform regulation and access threshold, explore the way of podcast commercialization, and break the problem of podcast cash seek.

Establish the Independence of the Podcast in the Audio Market

What is a “podcast”? In many people’s stereotypes and the affiliated development positioning of podcasts in the Chinese audio market, “podcast” often exists as a branch of “audio”, and the difference between “podcast” and “audio” is not so clear. So, when a lot of people discuss “China’s audio market is booming”, they are actually expressing paying for knowledge, audio books, or other audio content, without including podcasts. But in foreign countries, especially in the United States, where podcasting is relatively mature and well-developed, “podcast” has been regarded as a separate medium, and the recognition of its independent value has become a market consensus. China’s confusion between “podcasts” and “audio” will undoubtedly continue to affect the development of Chinese podcasts. The top priority is to make the independent value of Chinese podcasts recognized by the Chinese audio market, so that Chinese podcasts can play their real role as an independent medium.

Remove the Niche Label of the Podcast

Based on the development positioning of the audio market of “podcast”, the development of “podcast” in the past is often on an awkward edge, abandoned by the mass audio market, and labeled as a niche “forgotten”. From 2019 to 2022, after the Chinese podcast market gradually shifted from creator to platform dominated, podcast creators and traditional podcast market were “greatly reshuffled” by capital and crowded and confused after being impacted by capital rules. In just a few years, China has completed the key node of the development of American podcasts for more than a decade, and is rapidly driven forward by capital and the market. The Chinese podcast itself lacks the gap between thinking and reflection. Secondly, the development of podcast has also been affected by the fault of listening habits and the squeeze of the video industry. The newly emerging “niche” podcast market is “calm” again in a chaotic situation that is not enough to support this capital competition.

Therefore, when the podcast has not adapted to the new rules brought by the capital “big reshuffle” to the audio market, most platforms do not give enough time for the Chinese podcast to get out of the “niche”, and only focus on how to make profits and cash. There is no denying that the rapid investment of capital does inject fresh vitality into the Chinese podcast market. However, without waiting for the transformation from “minority” to “public”, it too early starts to harvest the “leeks” brought by podcast, which is undoubtedly hasty behavior for the development of podcast itself. To borrow a line from Jiang Wen’s film: “Let the bullet fly a little longer”, then the author also hopes that “let the Chinese podcast fly a little longer”, can gradually adapt to the change of the audio market, how to deal with capital, and how to turn the “niche podcast” into “mass podcast”.

Break the Production Threshold and Production Level Dilemma

From 2020 to 2022, a variety of podcast programs have sprung up like mushrooms after a spring rain, but behind the short-term development and prosperity of Chinese podcast content, there are still many difficulties in the entry threshold and production level of podcast production.

In terms of production and producers, the threshold for audio production is higher than video. If you want to complete a basic audio production, you need to know how to use audio software to complete noise reduction, pressure limit and other operations at least. But for most beginners who want to make audio production, technology is first a threshold to make podcasts. However, in contrast to the popularity of short videos, a Chinese Vlogger does not have the skills to use PR, AE, PS, and other professional software for video production, it can also use the “fool clip software” developed by the streaming video platform for video editing, such as the clip launched by Capcut and so on. Therefore, in order to reduce the access threshold and technical restrictions of podcast production, it is necessary to develop audio software made by mobile or web terminals, which can increase *the* public participation in podcast production to some extent.

Secondly, the time cost of making audio production and the immature podcast business system make it difficult to realize podcast programs. Apart from head podcast creators, niche podcast creators can't make money *from* podcasts. Without continuous financial support, no matter how good the *quality* professional podcasts have lost their reason to present them. In order to break the dilemma of the production threshold and production level of podcast creators, the “niche label” of *podcasts* should be gradually removed, and more users should flood into the podcast market. Large platforms should use their extensive audience resources to promote quality head podcasts, explore niche podcasts, understand listening *tendencies*, design usage functions and interface layout; in the meantime, establish podcast creator reward mechanism and original excellent creator signing and supporting mechanism, so that more capable, content and ideas can produce more high-level podcast works. In addition, the ubiquitous podcast client can try to cooperate with large platforms, relying on the reputation and user base of the big platform, and achieve mutual benefit and win-win results through the exchange of audience traffic and podcast resources.

Solve the Problem of Content Supervision and Release Threshold

The short-lived boom in Chinese podcasting also highlights the problems behind the complexity of podcasting content and levels. The inconsistency of the red line of content supervision on different platforms leads to the difference of the release threshold on different platforms; the content supervision red line stifles the creator's content out of context. These invisible rules and systems, repeated rectification, invisibly raised the threshold of podcast publishing, increased the production cost of podcasts, and even hit the production enthusiasm of podcast creators.

The sensitivity and ambiguity of content regulation and publishing thresholds have led to many high-quality programs being forced to rectify or even be removed from the shelves. It can be predicted that the removal is obviously not the result that the creators would like to see. In order to present their programs to the audience, they often revise them many times in order to save the programs that have been removed, even if the final revised version has lost the content and meaning that the original version wants to express. For example, “Villain Movie Review” announced that it would only be updated on the official account platform because it could not bear the arbitrary removal of Himalaya; the beginning of the 61st issue of “Writers, Stalin and the Legacy of Rome” of “Left and Right” was judged by Dragonfly FM as a suspicion of “historical nihilism” and suggested revision, while it was successfully launched on other platforms.

In addition to relying on the regulatory standards of standardized platforms, standardizing the creative behavior of creators is also what podcasting needs to pay attention to in the process of development. At the beginning of 2022, some professionals predicted that more podcasters would be sued or censored and ordered

to rectify their podcasts this year as they gradually moved into the public eye. Some time ago, Neil Young, a well-known rock singer, asked Spotify to choose between him and podcaster Joe Rogan, who Young believed had spread false information about vaccines through his show. Spotify as a platform needs to take responsibility for reducing the spread of false information. If Spotify continues to host Joe Rogan's podcast show, he will remove his music from the platform, and his request will force Spotify to some extent to regulate the platform's censorship rules. This case also demonstrates from the side that once the discourse content enters the public sphere, podcasters need to strictly restrict their own content and self-examine the content of the program.

This case has further influenced the discussion between platform censorship and the main content of Chinese podcasts. In Chinese podcasting, the discussion on the regulatory mechanism is becoming more and more intense, which also indicates that the development of podcasting will usher in diversified and benign development channels after the "cooling-off period".

Decentralize the Platform

The current Chinese podcasts still follow the platform thinking mode of the Web 1.0 era, which may not be suitable for the development trend of the current podcasts when tested by practice.

Western podcast development has always adhered to the spirit of the Web 2.0 era—free, open, shared cyberspace, which is often called the "decentralization" of the Internet. In other words, without a strong platform to control this open podcast environment, the control of the platform should give way to the openness of the podcast. China's audio market has been in a "platform-centric" environment since the emergence of the Himalayan FM in 2012. This means that the platform's preferences determine what kind of programs can get recommended opportunities, and they become the head program, and the business model that fits the platform's own strategic plan can get more support.

After experimenting in recent years, several leading audio platforms have found it impossible to just provide hosting podcast creators and then rely on traffic from their original content for advertising. So they changed their minds and tried a new business model—"pay for knowledge", such as Himalaya FM, known for its "pay for knowledge" business based on subscription. However, such a business model still does not change the problem of "platform centralization", but only solves the profit problem of the platform, and always ignores the development needs of podcasts themselves.

Podcast subscription is anti-platform centralization, which is often topic-oriented; listeners' interest, preference, and recognition of podcast content are prerequisites for listening, which means that the presentation of podcast content requires greater freedom, the threshold is low, everyone can do it, and there are no restrictions on topic content, duration, and update frequency. Platforms often do not give better space for podcasts to develop. The current living environment of podcasts is not optimistic. Once there is no value and profit space to exploit, the freedom of podcasts will be more limited.

The Inevitability of the Commercialization of Podcasting

As far as most people know, there are five main ways to make money for podcasts: oral broadcasting and customized advertising; content payment; exclusive production and broadcasting by a single platform; spontaneous rewards from listeners; and sales of products around podcasts. According to the Global Entertainment and Media Industry Outlook 2020-2024: China Summary, Chinese podcast advertising revenue will reach \$194 million in 2020, ranking second in the world. In 2020, for example, "618 Shopping Festival",

“Double 11 Shopping Festival”, podcast commune, Just Pod and other agencies and Taobao platform marketing cooperation, “Tmall International Youth Laboratory” joint audio brand Just Pod launched eight sets narrative podcast content “something”, mainly focus on eight items, by telling the story behind the items to present the cultural context. In addition, many podcast organizations also provide customized services for brands, feeding back the original podcasts through the revenue of brand podcasts, and expanding their influence while realizing self-sufficiency.

But in fact, the podcasts that can cooperate with big platforms are basically at the top level of the industry. So, there are still a few podcasts that can make money through advertising. There are still problems in the commercial operation of podcasts. At present, it is difficult for independent podcasts or small and medium-sized podcasts to gather enough traffic and volume, and their own popularity, commercial exposure, and traffic conversion rate are not enough to attract advertisers for cooperation and investment. Coupled with the lack of technology and data support for podcast advertising effect monitoring and value quantification, the advertising revenue of China’s podcasts has not yet formed a scale.

In this case, large platforms are naturally more likely to attract funds for centralized and multi-faceted development, for example, WeChat listening client supports payment business. Users need to open membership, which is divided into monthly card 25-yuan, quarterly card 50-yuan, annual card 168 yuan, and other membership prices, in order to get further exclusive privileges of high-quality resources and unlimited listening experience of the platform. This kind of platform is responsible for the operation and fees, so that the creators can devote more time to the creation, without being distracted from considering the lack of funds for the follow-up production of the program.

In addition to relying on the development of large platforms to solve the problems of production funds and commercialization, new breakthroughs have been made in the way of commercialization development based on podcasters themselves. Waypub, a podcast content distribution tool released in 2020 by Podcast Commune and Podcast Network, provides free multi-platform distribution services for podcasters based on full control of podcast content by creators. At present, the project has accumulated a certain pool of advertising resources, coupled with its investment in dynamic advertising technology, while allowing audio and Chinese podcasts to have a preliminary exploration in commercialization. To sum up, this series of behaviors towards marketization and commercialization also indicate that the trend of Chinese podcasting towards commercialization is irresistible.

Summary

Although the development of Chinese podcasts is short and rapid, the outbreak of the first year of podcasts has brought a lot of attention from capital, creators, and audiences, at least providing more opportunities for the subsequent development of podcasts.

At present, the domestic market has entered a “cooling-off period”, and the basic pattern is stable. After the capital reshuffle, the major platforms are trying and exploring to varying degrees, trying to pull the podcast from “minority” to the “public” vision, and seek more long-term development.

In the long run, the future competitive situation of the podcast industry may be the same as that of the music industry. After developing to a relatively mature stage, how to attract more podcasters through a reasonable income distribution system and discovery mechanism to maintain the continuous output of high-quality content on the platform is a problem worthy of consideration by the podcasting industry.

For Chinese podcasting, the most important thing is to get rid of the inertial thinking of Web 1.0 as soon as possible; break the situation that audio books and audio variety occupy the mainstream of the audio market. On the basis of content classification, each platform unifies and relaxes the content auditing system to attract more high-quality and innovative content producers to join; expand the influence of podcasting in the mainstream communication level through high-quality and in-depth content, stimulate the commercial value of podcasting from inside to outside, and establish the influence of podcasting as an independent industry.

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