**No longer the only game in town: British indies, podcasts and the new audio economy of independent production**

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**No longer the only game in town: British indies, podcasts and the new audio economy of independent production**

**Richard Berry**

**Abstract**

The world of audio is undergoing seismic changes. Traditionally a space dominated by linear radio programmes, in the 2020s this form of listening remains relevant but is now being challenged by other forms and global media platforms. In particular, podcasting offers producers opportunities to pitch for commissions from brands and platforms or to make work independently.

Historically, podcasting was a medium led and shaped by amateurs and distributed for free by independent creators. In the 2020s this relationship began to shift. In the United Kingdom, audio producers are now finding success outside of radio, in what was once a market dominated by the BBC. Forming what we might term a 'new audio economy', producers and creatives are working across multiple forms of production in the long tail of audio media

Through interviews and analysis, this article will explore the impact of podcasting and other forms of audio production on the UK Independent radio/audio sector, noting the influence of the BBC and shifting patterns of production within the sector

**Keywords: Audio Production, Podcasting, Radio, BBC**

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**Introduction**

In the March of 2021, *The New York Times* published an article that explored the growth of podcast production in the United Kingdom. As a medium that is now well into teenage years, it should not be a surprise that the market was expanding; not least as the same newspaper reported a few weeks before that 'podcasting is one of the hottest corners in media' (Sisario 2021) as it becomes a space where Hollywood capital is transforming the industry. It describes movements that have seen multi-billion-dollar investments and the appearance of star names such as the Obamas and the Duke and Duchess of Sussex, all keen to exercise their global brands in podcast form. In a medium that was born from amateur content, the last few years have been transformative for podcasting (Sullivan 2019), not just in terms of awareness (Edison Research 2021: 54) and listening, but also the economic transformation these trends bear witness to. In the United States, podcasting has emerged, not only as a credible medium in which to work, but also one in which creators can exercise control over their media profile and leverage the audiences they gain to migrate concepts into other platforms (White 2019). The research conducted for this article would suggest that these patterns also appear in the United Kingdom, which explains why, it is considered to the number two podcast market globally (Ackerman 2021).

In this discussion, it is hard to ignore the influence of the BBC, not only as a producer, but as an employer and commissioner. In the most recent annual report, the corporation states that it employs almost 25,000 people (BBC 2020), and accounts for just under half of all UK radio listening (RAJAR 2020). The BBC is a leading podcast brand, and has been a hub for independent production since the 1990s. However, in the 2020s this is a paradigm that is changing. As *The New York Times* reported, UK-based independent production companies (Indies) are now successfully making content that is *not* destined for broadcast on BBC Radio or the BBC Sounds platform, which highlights how these businesses are also ‘trying to prove they can produce content without the public broadcaster's backing' (Sisario 2021). This is where the new audio economy lives: an environment where independent producers can choose to work with the BBC, make their own content, or engage with a range of other opportunities (Spangler 2019).

In the context of this special issue on UK and Irish radio in the 21st century, this article will explore how the UK audio industry is diversifying, with specific reference to independent radio/audio production companies. Through a small-scale study, content analysis and interviews, this article outlines the contexts and changes of contemporary audio in a media industry studies framework (Freeman 2016: 80-82) and will document the current status of the UK audio production industry.

**The BBC and independent producers**

Before exploring the current situation, it is useful to briefly outline the nature of independent production and its relationship with the BBC. As the national broadcaster, the BBC has established itself as a hub for the kinds of creative production that have flourished in podcasting. This interdependent relationship between public broadcasters and podcasting is not isolated to the UK, as Brad Clark and Archie McClean note, ‘[t]here is little doubt that public broadcasters have pioneered spoken-word podcasting in North America and that their creative efforts are advancing audio production in new ways’ (2020: 215). As a result, popular podcasts are either 'produced by or owe a lot to public broadcasters' (ibid: 227). A point echoed by Neil Verma who notes how podcasting fuses public radio storytelling with the entrepreneurs of the tech world (2019: 280). Just as public radio in North America nurtured producers who then found success outside of the system (Aufderheide et al 2020), a similar pattern has emerged in the UK partially via production companies initially started to feed independent content to the BBC.

Historically, the BBC was a vertically integrated organisation in control of all aspects of production and technology, from programme-making to transmission. The Broadcasting Act 1990 placed new conditions on the BBC forcing it to open up production opportunities to external providers (Hesmondhalgh 2007: 169; Doyle and Barr 2019); although the act referred specifically to television, a voluntary quota for radio was added. As David Hendy notes, this sector barely existed in radio, but soon grew as cuts to the BBC meant that former staff members formed their own companies to ‘win contracts with their old employer to make the sort of programmes they had done before – but, it was assumed, at a lower cost’ (2007: 289). This process has parallels with the world of public radio podcasting in the United States in the 2020s, where 'the skills and connections made as a result of one's experiences in the public radio sector can be directly leveraged to facilitate entrepreneurial activities' (Cwynar 2019). By May 2010, trade body The Radio Independents Group, now AudioUK, estimated there were 150 active independent radio production companies supplying programmes to the BBC, commercial radio, and other clients (2010).

By requiring BBC TV and Radio to outsource to the independent sector, the corporation effectively laid the ground for the independent production sector we see today: one in which the BBC has been a significant source of work via a series of routine commissioning rounds. These commissions now extend to online content, distributed via 3rd-party platforms and their own ‘BBC Sounds’ platform (Berry 2020) which, at the time of writing, is the subject of a review by the industry regulator ‘to take stock of the market position of BBC Sounds and assess whether there are any issues that need to be addressed’ (Ofcom 2020). In effect, the BBC can be seen as a key actor in the development and constraint of the UK audio sector. The influence of the BBC is salient here, not least because as Freeman notes it is difficult to research British media 'without having to account for the authorial presence and influence of the BBC’ (2016: 79). This influence can be witnessed, not only in the presence of BBC content in podcast charts, but also the role it plays as a commissioner of work from the independent sector. Speaking on an industry podcast, the Creative Director of Made in Manchester, highlighted this impact in the podcast market, noting in the UK listeners have access to ‘programming that you get for free. In America, it's different because they don't have that and therefore people are prepared to pay donations […] to keep things going’ (Radio Today 2021). In other words, UK listeners get high-quality audio as part of the licence fee and thus listeners might be disinclined to financially support work that they already get as part of the licence fee and in this lies one of the challenges in contemporary audio.

The impact of the BBC's ability to cross-promote its podcasts across radio and television is also of significance, not least on the Apple platform which uses data from new subscriptions to record chart positions (McLean 2020), where the BBC can leverage its reputational power to ensure their content can be found. Chief Content Officer of the UK's largest Indie, *Somethin’ Else,* Steve Ackerman says this becomes evident:

[I]f you go on Apple podcasts or Spotify and see the amount of BBC releases there are, and obviously, the promotion that they're able to put behind BBC Sounds on their channels, that can be a threat to the market[…] and that's obviously not good for someone like us (Ackerman 2021).

These ‘infrastructures of discovery’ (Morris 2021) are increasingly important in the marketplace of attention (Webster 2014), as in the online space ‘Audiences are increasingly reached via online intermediary platforms managed by a relatively small number of U.S.-based online platform companies’ (Martin 2021).

**The economic and conceptual evolution of podcasts**

The BBC first began to explore the opportunities of podcasting in the early 2000s, when the *In Our Time* (1998-present) podcast was at one time was one of the most downloaded podcasts in the world (Berry 2006). For the BBC at this point, podcasts were a means to deliver pre-existing programmes to listeners via RSS (Really Simple Syndication). Over time, the notion that podcasting was merely an extension of radio has been questioned and re-evaluated by broadcasters and academics (Nuzum 2019; Aufderheide et al 2020; Clark and McLean 2020). Many of the first adventures into podcasting by UK radio producers, were ones that considered the platform as a tactic to extend the reach of their programmes, not just geographically, but socially and temporally. This was an era described by Tiziano Bonini as the first age of podcasting, where broadcasters felt that 'this tool had the potential to better serve their listeners and legitimize license fees in a historical period of slow but constant FM audience decline' (2015: 24).

As time went on this view shifted, partly through the success of native works like *Serial* (2014-Present) and others, where broadcasters were producing/commissioning radio *and* podcasts as distinct media. In the case of *Serial* this represented a form of ‘economic hybridity’ (Patterson 2016) where different forms of production were located under the same franchise. In their assessment of public radio podcasts, Clark and McLean (2020: 218) highlight the techniques of public radio derived podcasting, including a feature they describe as 'backstage transparency', when elements that 'often take the form of audio that would traditionally be cut' from radio documentaries, are able to 'reveal something about the featured character, show producers, or hosts’. We can see this in action in a recent British podcast, produced by independent production house Chalk and Blade for the commercial radio group Global. *Hunting Ghislaine* (2020-2021) features the investigating journalist John Sweeney attempting to trace the socialite Ghislaine Maxwell in the fallout from the Jeffrey Epstein scandal. The series demonstrates many of Clark and McClean’s features, including its short run, plot, and the use of moments of reflection where Sweeney draws his producer, Ruth Barnes, into what could be described as ‘sidebar’ moments, where we take a break from the action to assess where the story is and where it might be going. These self-reflexive moments are elements that Dowling and Miller attribute to the development of the medium in recent years, where such work is ‘indicative of a sea change in the industry’ (Dowling and Miller 2019: 170). It is in these moments that we can see crafted native podcasts draw on techniques that are reminiscent of the 'chatcast' where hosts informally bounce ideas about, drawing upon the aurality of radio production and the transparent informality of blogging, in what Lindgren has described as a ‘metacommentary’ on the production process. (2021: 13).

 To explore this more, we can compare *David Tennant Does a Podcast with…* (Somethin’ Else 2019-Present) to the approaches of *Desert Island Discs* (BBC 1942 – Present). While both focus on the interview as ‘a pathway to gain insight into the private motivations of public people’ (McDonald 2020: 189), and both are available as podcasts, it is the Tennant podcast that fully demonstrates the authentic podcast aesthetic. In an episode featuring James Corden (2 April 2019), the interview starts with an unscripted exchange between Tennant and Corden that acts as a soft opening. Whereas the BBC radio show addresses the listener directly, the podcast uses informality. The only time Tennant addresses the listener directly is when reading advertising. Advertisements often feature Tennant’s wife Georgia, adding to the sense that this is an audio extension of his public persona. These techniques are key to aural parasocial qualities of podcasting, where Daniela Schültz and Imke Hedder suggest that: ‘Despite the recent professionalization of the podcasting landscape, authenticity and affability are still defining characteristics of popular podcasting’ (2021: 3). They further suggest that such host read messages may be highly effective as 'listeners connected to podcast hosts are susceptible to their persuasive messages' (ibid: 11). The podcast *Ian Wright’s Everyday People* (Somethin' Else 2021) is a series that showcases 'real-life heroes that are the beating hearts of our communities' through studio quality interviews, in which the host often summarises key points in a voiceover to improve flow and focus. This blends the niche appeal of the podcast interview with the radio sensibility of the need to edit, craft, and keep the listening experience concise. The development of the podcast narrative aesthetic is documented by producer and academic Siobhan McHugh (2016) who, with Lindgren, notes ‘That narrator-driven form is attractive to younger listeners and, when they get a chance to produce radio, it is their storytelling form of choice’ (Lindgren and McHugh 2013: 109). Although podcasts are not constrained in the same way that radio is, the logic behind such moves is defined well by Steve Ackerman, Chief Content Officer at Somethin’ Else (the company that makes the Ian Wright series) noting that

From our mentality, the key driver of that is the fact that the audience can press stop at any moment. And what that does to you creatively is it ensures that you are much, much more focused on the audience and much more focused on thinking, is this going to keep someone listening and, and also much more focused on making sure that you don't have anything on tape that gives someone a reason to press stop. (Akerman 2021)

This work typifies the new opportunities to produce high-quality work in which the experience of radio production may be relevant, but where the practices of production, distribution, and consumption are rooted in podcast cultures (Sellas and Solá 2019), and the need for content to be commercially viable through the use of star names and high production values. As they become more embedded into our lives, podcasts have evolved sonically and economically, and this has allowed creators to find new opportunities outside of places like the BBC. Fresh Air Productions produce work for the BBC and Audible and have witnessed this development in understanding where the company founder notes that:

Even four years ago, I had to start most of my pitches and most of my meetings, explaining what a podcast was and I no longer have to do that […] it's one of the main things why branded has picked up so much because marketing managers understand what a podcast is now. And they also understand why it's worth it because they know why they love podcasts ‘(Cowling 2021).

This is not a process of transferring old ideas into a new space, but of creating new work that reflects the emerging grammar of the medium and the needs of the audiences in these spaces, as 'podcasting suffers as a medium from being perceived as easy and quick and cheap […] it shouldn't be any of those things. It should be well-produced to a broadcast standard' (Cowling 2021), reflecting how many producers within the companies examined deploy skills honed in radio stations.

**The new audio economy**

Although the BBC still looms large in UK Audio, independent producers can now also seek alternative commissions from digital platforms (such as Audible), or work directly with brands or organizations, or make independent work under their name. As part of the work for this article, the author conducted a snapshot view of the independent production sector in the UK, using the published list of AudioUK members to document activity. Although not all active audio production businesses are members of AudioUK, and not all members produce radio or podcasts, the website is the only single list of independent producers in wide circulation and therefore offers the best possible means of analysis and provides parameters for the research (Kozinets 2015: 163). At the time of data collection, April 2021, the website lists 114 members which include both freelancers and large production houses. For this snapshot freelancers (six) and websites that were under construction, unlisted, or otherwise un-available were discounted. In the remaining group, 62 members produced work for BBC Radio, creating the largest of the subsets created for the study, (the second most populated category in the study captured activities such as TV production, PR, event management, web design).

This study aims to capture a picture of diversification away from the BBC as a source of work and so data was collected for the following production forms: BBC podcasts (twelve), podcast production for clients (44), radio production outside the BBC (eighteen) and 'other audio work' such as audiobooks, Audible commissions or art installations (33). A category of 'own podcast' captured data for productions in which the producers' name appears on a podcast app for a production in which they have been ascribed author status (thirteen). In total there were nineteen producers listed who did not reference BBC Radio work and identified themselves as audio or radio producers, this equates to sixteen per cent of the whole sample, which does include one radio station. Across the businesses in this study, a taxonomy emerges, which includes new businesses with a podcast focus, established businesses that mix BBC commissions with other forms of work and businesses that have, so far, not fully exploited the opportunities elsewhere.

Tim Wilson of AudioUK, reflects this diversity and suggests that producers are becoming more entrepreneurial as once they

were heavily reliant on the BBC because they were only game in town. But now they have other options open to them for making high-quality audio content. They still very much support the BBC - it's a great brand and really gets their content out there and noticed, there is no question of that. But they're definitely not the only game in town (Wilson 2021).

AudioUK was formerly the Radio Independents Group, the name change took place to recognize the diversification in the sector. This is well illustrated in the sample with the growth in audiobooks and 'branded' podcasts produced for diverse clients. Examples of this form of collaborative work include *'For All, I Care'* (2020-2021) an experimental documentary series produced by Reduced Listening for the Baltic Centre for Contemporary Art, or ‘*The Energy Podcast’,* a branded podcast produced by Fresh Air Productions for Shell. The latter takes a critical approach that actively challenged the company's green credentials where 'it enables them to intellectually engage in the conversation. And then to create content that hopefully presents a rounded conversation, you might get to the end of it and still think they're greenwashing[…] but at least offers the chance for them to have a longer conversation’ (Cowling 2021). This work takes on a crafted approach that engages in the qualities of the medium, as Neil Cowling (of Fresh Air Productions) notes: 'What podcasting enables is for brands to have a conversation that holds someone's attention for twenty plus minutes, and that is a depth of engagement that they cannot get in any other media' (Cowling 2021). But rather than operating as a marginal activity, branded production is a lead, if not sole, activity for some of the companies examined in this study.

In addition to the option to sell ideas to the BBC, we must now consider a new sector of cash-rich platforms, including Audible and Spotify. By revisiting the sub-set of producers who declare they produce work that cannot be neatly defined as either ‘radio' or 'podcast', it can be established that of the thirty-three businesses who declare such work, nine cite Audible as a client or feature the work on their website. Unlike work produced for broadcast radio, work for these platforms is sometimes exclusive and only available to paying subscribers. Audio productions such as sitcom *Slaving Away* (Unusual Productions for Audible), *The Sun King* a documentary series on the Murdoch’s (Somethin' Else for Audible) and the ‘audio experience', *My Dog’s Favourite Podcast* (Listen Entertainment for Spotify), form part of this growing tranche of work. This aspect of growth represents fertile ground for future research, not least as the restrictions of platform-specific content challenges the historical notions of what a podcast is (Berry 2006; Spinelli and Dann 2019; Bottomley 2020: 96-125). These are therefore key debates that we must consider as podcasting undergoes platformisation (Sullivan 2019) and increased industrialization (Sullivan, Fox and Berry 2021). As interviewees have outlined, these platforms bring with them money and creative freedoms not afforded by BBC commissions, which are limited by the capacity of schedules and the nature of the BBC editorial process, audience expectations, and the legacy broadcast radio platorms themselves.

As indicated previously, a further section of work amongst UK independents are 'original podcasts', where series are produced and monetized via podcast platforms, in what Ackerman suggests is already a billion-dollar industry '…it's going to get to, sort of, five billion within a very short space of time. So, you've started to see a very aggressive growth […] currently, after the US, the UK is the other significant market now' (Ackerman 2021). This expansion of listening allows for UK Indies, such as Somethin' Else, Made in Manchester, Listening Dog Media, Listen Entertainment and Sound Rebel, to produce advertiser-supported podcasts. Across these productions, a range of formats and topics are used, from documentaries such as *The Fault Line* (Somethin’ Else), to podcasts exploring topics such as TV nostalgia (*Distinct Nostalgia* – Made in Manchester) and parenting (*Hot Mess Mums Club* – Listening Dog Media).

In *Cultural Industries* (2007), David Hesmondhalgh outlines several areas of culture in which the internet has had a transformative impact (Hesmondhalgh 2007: 255). Key to these is *circulation* and the *effects on production* (ibid: 266). Hesmondhalgh questions whether digitalisation and convergence will open up the 'access to the means of production and circulation' (ibid: 53), and see barriers breaking down. In the wider case of podcasting, I would assert that the answer is 'yes'. Podcasting is a multimodal medium, one that allows democratic access for individuals, but also a commercialised space where producers can exploit new forms of circulation and financing. Although not all podcasters seek to monetise their work, those with successful podcasts can be financially stable, although as Ackerman notes 'you've got to be in that top few percent.… if a podcast is getting 50,000 plus listens a week, it's going to be making money, and if it's getting 100,00 plus listeners a week, it's going to be making good, good money' (Ackerman 2021). Although, as Bottomley highlights in the long tail, this success belies a wider pattern where people are not making money, as 'less than the top one percent of podcasters are currently making a living off of it' (Bottomley 2020: 239). Although this may not dissuade new entrants to the market, it may be a deterrent to production companies.

Furthermore, as Apple and Spotify position themselves in the subscription market, another market begins to open up which may have advantages over the cost-per-thousand model used in advertising, as’ you've got to have 10,000 listeners to make you £250 [in advertising ...] on a subscription model, you could make a £1 a listener […] that £25 per thousand listeners becomes a thousand quid for a thousand listeners […] the route to making money is so much clearer’ (Cowling 2021). The use of channels within the new Apple Podcast app, (Deegan 2021) suggests that brands (or networks) will be able to exercise their cultural capital and build relationships with listeners and offer clearer routes for companies to monetize work. There are additional opportunities in intellectual property (IP), as ‘for the first time, IP has a value in audio, and in a way that it's never really done before […]. The live element is very significant […] then there’s things like merchandising […] which from a radio perspective would have been unthinkable’ (Ackerman 2021). This IP exploitation has already seen many American podcasts move into the TV space with deals with Netflix, Amazon Prime Video, and others (White 2020).

This all represents a form of diversification within the economy of the audio industries, where podcasting and on-demand platforms lead to ‘diagonal’ expansion (Doyle 2003: 23) within a ‘discursive context’ (Freeman 2016: 134), where new platforms offer new routes to distribute and monetize work, thus creating new opportunities for creative audio producers and their employers. Although some smaller and typically single producer companies will continue to focus on BBC, and other public service radio work, audio businesses are now more likely to be multifaceted and work across multiple platforms.

**Conclusions**

This study reveals that expansion of opportunity in the audio market has allowed for diversification of audio production, in which the BBC retains a significant status, but where viable businesses are emerging who no longer rely on, or even wish to seek, BBC commissions. In this space we can observe the tripartite impacts of politics, technologies, and economics, including the political and financial constraints of the BBC, which make the new markets possible and more appealing. These emerging markets are increasingly viable on their own terms. So, although BBC commissioning still has reputational benefits, there are challenges:

[W]ithout doubt, the budgets you're seeing in podcasting, are far more significant than you would have seen traditionally in radio[…] the BBC or commercial radio broadcasters, are still operating much smaller budgets […] and I think many independent audio producers still have this to an extent with the BBC, where you're, almost, for some projects subsidizing the project, because, in effect, you've got people committing more time than you actually being paid for (Ackerman: 2021).

The view is shared by Cowling, who suggests there is a hierarchy of production outlets, led by Audible/Spotify commissions, followed by brand partnerships, and then self-release, ‘and if I'm completely honest […] because of the money and the amount of time it would take [...] the BBC are at the bottom of that hierarchy of buyers’ (Cowling 2021).

The research work conducted for this limited study reveals that the UK is following the USA into an audio renaissance, where solo producers and multimodal enterprises can create bespoke work across multiple audio platforms, that still includes radio. This has added more options for independent (radio) production companies, where ‘what typifies media professionals in the digital age is an increasing complexity and ongoing liquefaction of the boundaries between different fields, disciplines, practices, and categories that used to define what media was’ (Deuze 2007: 112). This is an environment where producers can opt to find the right model for the idea (and budget) they have in mind. So, rather than seeing the slow death of radio, we are witnessing an explosion of audio production that has ‘has ‘given audio a new life because […] all of the places that radio has sought to be available as people go about their daily lives, audio can be in those places too’ (Wilson 2021). It is relevant to note that since interviews were conducted, Somethin’ Else has been acquired by Sony Music, with Steve Ackerman and CEO, Jez Nelson, taking on new roles leading Sony’s growing podcast division from offices in New York and London (Barker 2021).

During the period this article was being drafted each leading podcasting platform announced subscription packages that allow producers to monetise work, not through advertising but through a process in which platforms act as e-commerce retailers, selling subscriptions on the behalf of producers. These changes raise questions about the political economy of the audio industries and whether producers are trading one intermediary (the BBC) for another? Although podcast and audio platforms offer additional opportunities for reach and revenue, producers have less control over the interface (Nielsen and Ganter 2017), and the return may not be as lucrative as anticipated (Berg 2021; Nuzum 2021). Whilst an independent release now has added impetus for revenue generation via subscription, a commission from a global platform brings other economic benefits, by accessing a potentially global reach. As ‘Spotify can put you on a billboard or do paid ads for you […] Audible will promote the hell out of it […] all over the place’ (Cowling 2021).

Even in this discussion, the extent to which the UK audio market is changing (and growing) has become clear. This discussion alsosuggests, however, that more research is needed to further evaluate this under-researched phenomenon. Research which can explore the expansion in the audio marketplace, the resulting changing role for the BBC, and the impact of industrialization in podcasting; not least to the extent that new gatekeepers could replace the BBC, ‘increasing the possibility of anticompetitive behaviors and decreasing inclusion through heightened barriers to entry' (Bottomley 2020: 242). What is also clear is that a marketplace of ideas is emerging, in which the BBC now must compete for audience *and* ideas. The purposefully limited scope of this study precluded a detailed investigation of businesses that are not listed on the AudioUK website, including some who have a specific focus on new digital works. Future work will need to account for these producers, such as Broccoli Productions and Chalk & Blade, as they diverge away from BBC work and find new partners, such as Sony Music (Spangler 2019). Also of note here is the Audio Content Fund, which uses licence fee money as a biddable scheme 'used by independent production companies to produce distinctive, public service radio content for broadcast on commercial and community radio’ (Audio Content Fund 2021). This scheme has also created new opportunities for producers to create innovative public service radio projects. What is clear already is that producers now have wider opportunities to pitch ideas and produce work as part of a sector that is experiencing an exciting moment in its history. Rather than waning in stature, the UK audio market is thriving; albeit in a direction where the BBC is no longer the only game in town.

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