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Podcast Movement: Aspirational Labour and the Formalisation of Podcasting as a Cultural Industry

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Alex Blumberg's podcast entitled *Start Up* tells the story of his halting and sometimes comically inept efforts to start his own fledgling podcast production company, Gimlet Media. A public radio producer and refugee from National Public Radio's (NPR) hit series *This American Life*, Blumberg struggles to grasp the basics of startups, such as drafting a business model, courting sceptical venture capitalists, finding a financial partner, and cultivating his own personal brand. Blumberg's experiences—packaged self-referentially as a podcast series produced by the very production company that is the subject of his show—offer a revealing window into some of the profound changes currently under way in the podcasting ecosystem. The launch of Gimlet Media is symptomatic of a broader trend in podcasting: the slow transformation of an amateur medium into a new vehicle for commercial media content.

While podcasting has thrived since its creation in 2004 as a bastion for homegrown, amateur media production, in the past several years, entrepreneurs and so-called 'legacy media' companies (those with commercial interests in broadcast radio and television) have rapidly expanded their interests in podcasting as a business, bringing professional standards and the logics of capital with them. In the United States, well-resourced public radio stations like New York City's WNYC, for example, have started their own podcasting divisions (Sisario 2015), and advertising firms like Midroll have specialised in bundling popular podcasts for sale to advertisers. E.W. Scripps, a traditional

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media company which owns a diverse portfolio of legacy media such as newspapers, broadcast radio and television stations, bought Midroll in 2015 for $10 million and recently purchased podcasting app company Stitcher for $4.5 million. *Washington Post*-owned Slate Group (publisher of online magazine *Slate*) launched its own podcasting 'network' entitled Panoply in 2015, which features podcasts produced by corporate media giants such as *The New York Times*, *Huffington Post*, and HBO (The Slate Group 2015). These companies are motivated not simply by the creative possibilities of the medium, but also by the potential to cultivate mass audiences. A market survey conducted in 2015, for example, reported that 45 million Americans had listened to a podcast in the previous month (Edison Research 2015). Breakout hits such as 2014s *Serial* (with nearly 40 million downloads) and *This American Life* have demonstrated to both programmers and advertisers the potential for podcasting to emerge as a commercially viable media industry (O'Connell 2015). Thus, despite podcasting's roots as a forum for user-generated content, the recent expansion of the podcast audience and interest from traditional media has begun to transform it 'from a do-it-yourself, amateur niche medium into a commercial mass medium' (Bonini 2015: 27).

The entrepreneurial fervour surrounding podcasting in the wake of the cultural phenomenon of *Serial* is fuelling what scholars call *formalisation*. Formalisation describes the process by which

> media systems become progressively more rationalised, consolidated and financially transparent. It can happen as a result of increased state intervention in a particular industry, which finds itself dragged into the light of regulation and accountability. Alternatively, it can occur when formerly small-scale media concerns become integrated into larger-scale structures. (Lobato and Thomas 2015: 27)

In the case of podcasting, amateur podcasters with sizeable audiences are being recruited to join podcast networks, lured by the potential for a larger percentage of advertising sales revenue and the ability to expand their audience via cross-promotion with other shows on the same network. Additionally, existing media producers—many of them from legacy media such as commercial or public radio—are entering the podcasting space and directly competing with those amateurs. As a consequence, the commercial-style production values, audio quality, content genres, distribution methods and monetisation structures are beginning to inform the production practices of independent podcasters. Presented with the potential opportunity to pursue podcasting as form of gainful employment, podcast producers and hosts can be increasingly identified as an 'aspirational labour' force. Aspirational labour describes free labour

offered in the hope or expectation of future (monetary) benefits. Independent podcasters' dreams of future commercial success are not fleeting, either. Blumberg's podcasting company Gimlet Media, for example, recently raised $15 million from venture capital investors thanks in part to deals with traditional media companies to create new films and television series from some of its more popular podcasts (Abbruzzese 2017; Locke 2017). The success of podcasting networks like Gimlet Media demonstrates that the process of integrating podcasting into the commercial media ecosystem is well underway.

This chapter explores industry formalisation in podcasting by examining the entrepreneurial discourses found at Podcast Movement (PM) convention in 2016. PM was the brainchild of veteran podcaster Gary Leland and CPA Dan Franks, and launched in 2014 as a result of a successful Kickstarter campaign (Corcoran 2014). It has since grown to become the largest annual convention of podcast producers, distributors and technology providers, with over 2000 attendees. PM attendees represent a broad cross-section of the podcasting universe, from independent, amateur podcasters to radio station executives, advertisers, podcast-hosting companies, equipment manufacturers, podcast network professionals and crowdfunding companies, among others. Since PM attracts such a wide variety of players in the podcast ecosystem, it is an ideal venue to observe the process of formalisation up close. Based upon my own participant observation of PM16 in Chicago, along with a review of trade press articles, this chapter explores some of the deep tensions that have resulted from podcasting's recent rise in popularity. As I outline below, discourses of podcast formalisation at PM16 co-existed with more utopian discourses of self-expression, authenticity, democratisation and media diversity. The uneasy tension between these two discourses is indicative of the struggle for identity at the heart of the podcast ecosystem.

What Is Podcasting in 2017? A Short History of a Long Tail Medium

Podcasting has emerged as a pop culture phenomenon in the past several years due largely to the success of *Serial* in 2014. That podcasting should suddenly occupy such a prominent place in our cultural zeitgeist is curious, since the technology is hardly new; it has been around since the early 2000s. Podcasting can be understood as 'a technology used to distribute, receive, and listen, on-demand, to sound content produced by traditional editors such as radio, publishing houses, journalists, and educational insti-

tutions… as well as content created by independent radio producers, artists, and radio amateurs' (Bonini 2015: 21). The term 'podcasting' was coined by journalist Ben Hammersley back in 2004 (he also floated the term 'audioblogging') as a means to describe a mode of distribution similar to radio broadcasting, but delivered via portable digital devices, of which the Apple's iPod was the most well-known (Hammersley 2004). At the time, podcasting's popularity was limited due to the relative niche status of portable digital audio players like iPods and the necessity for those devices to be connected to computers in order to access new downloaded content.

The idea for podcasting relies not just on the internet for distribution, but in particular upon the technical infrastructure of RSS, known colloquially as 'really simple syndication.' Podcasting was built upon the open framework of RSS, and the idea to leverage the ease of the system to assist the distribution of online content was originally hatched by RSS creator Dave Winer and independent radio broadcaster Adam Curry. RSS allows online listeners to reliably find podcasts and to discover new podcasts with relative ease (Markman and Sawyer 2014: 20). Similar to the impact of the videocassette recorder with television, podcasting afforded listeners greater control and autonomy over when they listened to recorded content. In one of the first scholarly treatments of podcasting, Richard Berry (2006: 140) argued that podcasting represented an 'empowered' type of radio listening because it allowed listeners to time-shift and to carry their radio content with them thanks to the portability of digital audio players like Apple's iPod. Sterne et al. (2008) observed that this leveraging of RSS as the mechanism for distributing new content also 'creates an expectation of seriality which shapes both production and consumption practice: podcasts are supposed to repeat over time, so listeners subscribe to "shows" and podcasters make "shows"'. Thus, the notion of podcast 'shows' with updated 'episodes' with new content is a consequence, at least in part, of the underlying technology for distributing the content.

Podcasts are widely available as either via streaming or direct downloading to digital devices via helper software (such as podcatchers like iTunes, Google Play or other third-party desktop and mobile applications). Podcatchers have made it relatively simple to locate, subscribe and listen to on-demand audio files. When Apple decided to include RSS aggregation into their iTunes Music Store in Spring 2005, their market dominance in digital audio sales opened the floodgates for millions of iTunes users to easily locate and download podcasts (Sterne et al. 2008). The key benefits of podcasts over traditional broadcast media are their portability and their ability to time-shift other forms of media (such as radio broadcasts). Given its on-demand structure, podcasting is also very much in line with media consumption habits of

most twenty-first-century audiences who have come of age in an era of streaming platforms such as YouTube, Spotify, Netflix and Pandora. Podcasting has evolved considerably since the early 2000s, becoming more popular especially after the 2008 introduction of the iPhone, which allowed audiences to access and consume digital media on mobile devices anywhere and anytime. Thus, podcasting's rise in popularity is at least partially due to its technological features: its availability, convenience and near ubiquity thanks to global adoption of mobile smartphones.

To say that podcasting is essentially a method for easily distributing audio files online, while technically accurate, doesn't really capture how it has evolved as a medium with its own unique culture. As Markman and Sawyer (2014: 21) have noted, while the 'podcasting as distribution' model is a good description of how broadcast radio networks like National Public Radio (NPR) essentially allowing for easy time-shifting of programs, the popular fascination with podcasting stems mainly from the home-grown, grassroots nature of its content. Thanks to independent and amateur podcasters creating new podcast episodes on a continual basis, podcasting has developed a powerful ethos of authenticity. Since the economic and technological barriers to podcast production are low, tens of thousands of podcast shows have mushroomed, covering extremely small 'niche' topics such as 'The Pen Addict' (about the finer points of writing pens: fountain vs. ballpoint), 'Gilmore Guys' (two friends watch the entire series of *Gilmore Girls* with commentary), and 'Witch, Please' (two literature professors discussing the Harry Potter books from a feminist perspective) (Basu 2017). Listeners have discovered in podcasts what they may have found wanting in commercial media content: compelling, real stories about people from all walks of life, unburdened by the necessity to cultivate large, mainstream audiences.

Podcasting is thus a prime example of what Anderson (2006) has called a 'Long Tail' market. Online storage and distribution, argues Anderson, has made narrow, niche content economically viable which, in turn, is re-shaping how content providers imagine audiences. The richness and diversity of the podcasting ecosystem offers us a glimpse into a quintessential Long Tail media environment. Indeed, podcasters often proudly proclaim their creative independence from the strictures of the mainstream, and this newfound abundance of content options has promised to mark the 'death of the blockbuster economy' (Freedman 2012). As Ben Hammersley (Ulanoff 2015) noted, 'I don't think there is a mainstream anymore… Mainstream success is really a 20th century artifact.' As a distinctly Long Tail medium, the audiences for each show are tiny in comparison to legacy media like television and radio. For example, market research firm Edison Research has reported that podcast-

ing's 'Share of Ear' (the percentage of American audio consumers who listen) is a marginal 2 per cent. AM/FM Radio share of ear, by contrast, is 56 per cent (Ulanoff 2015). The sheer diversity of podcasting content, coupled with the enthusiasm from independent podcasters to jump online and explore tell their own stories, has fuelled podcasting's reputation as a uniquely home-grown, authentic medium.

Podcasting's status as an amateur medium began to shift in 2012 at the start of what Bonini (2015) has termed the 'second age' of podcasting. However, beginning in 2012, some of the most popular podcasts that were produced by American public radio broke away from public broadcasting to finance themselves through venture capital and crowdfunding. One of the earliest such efforts was the podcast *99% Invisible*, a podcast about architecture, which separated from KALW public radio of San Francisco to crowd-fund over a half million dollars over two years. The breakout success of the investigative journalism program *Serial* in 2014, which garnered over a million downloads per episode, captured the imagination of advertisers and content producers (O'Connell 2015). *Serial* provided yet another evolutionary inflection point for podcasting (Berry 2016), moving it into the mainstream and encouraging traditional media players as well as entrepreneurs to regard podcasting as the next great frontier for online media. Conventions like Podcast Movement aim to push this evolution of podcasting in the direction of traditional media markets by encouraging and bringing about the formalisation of the medium.

Entrepreneurialism at PM16: Discourses of Artistry, Authenticity and Autonomy

Upon descending the escalator into the cavernous basement conference centre of the downtown Hyatt in Chicago, one notices the familiar trappings of a typical technology-related convention: a registration desk, a large main stage room for keynotes, smaller conference rooms for panels and breakout meeting sessions, and a large area with vendors selling technology-related products and services. Amidst the chino-clad professionals from traditional media companies were a motley collection of largely amateur podcasters milling about. Since the entry fee of several hundred dollars is prohibitive for most (though presenters were able to attend for free or at a reduced rate), amateur podcasters went to PM with the implicit

promise of improving the reach and professionalism of their podcasts in order to gain an entrée into the world of advertising support. These are the 'pro-ams', or media creators who 'pursue an activity as an amateur, mainly for the love of it, but [who] set a professional standard. Pro-Ams are unlikely to earn more than a small portion of their income from their pastime but they pursue it with the dedication and commitment associated with a professional' (Leadbeater and Miller 2004: 20).

If they are not already semi-professional in their orientation, the unstated goal of Podcast Movement was to encourage amateurs to become professionals: by giving 'how to' seminars on the mechanics of high quality audio production and editing, by educating amateurs about the fledgling business of audience metrics, by introducing them to terminology in the advertising business, and by facilitating networking opportunities with key decision-makers working in media companies. While Leadbeater and Miller's definition was meant to describe a new class of media producers who have voluntarily adopted the content formats and production routines of commercial media, in the case of podcasting, it is more accurate to state that commercial media techniques and industry standards are being consciously grafted onto what was hitherto a largely amateur, user-generated media form.

The key to this pro-am transformation at PM16 was the discourse of *entre-preneurialism* that suffused the conference. Paraphrasing the influential Austrian economist Joseph Schumpeter, Lobato and Thomas (2015: 45) describe this historical figure of the entrepreneur as 'a risk-taker, the harbinger of creative destruction, a visionary who creates value where it did not previously exist.' Entrepreneurs, according to Schumpeter, are a 'revolutionary force' in otherwise static economic systems. The image of the modern entrepreneur has been heavily influenced by popular myths surrounding celebrity CEOs like Richard Branson of Virgin Group, Mark Zuckerberg of Facebook, and Steve Jobs of Apple: individuals who started small with a brilliant concept or prototype, who then went on develop multi-billion dollar corporate powerhouses. The popular image of the prototypical entrepreneur is also closely intertwined with Silicon Valley tech startup culture. In her investigation of Silicon Valley startups, Marwick (2013: 257) notes that entrepreneurs 'personify individualism, technological innovation, creativity, and intelligence – all characteristics that reinforce the myth of meritocracy.' Podcast Movement celebrated these qualities in the presentations and keynotes. The convention itself also served as a broader stage upon which entrepreneurialism was enacted by participants.

Artistry and Authenticity

The entrepreneurial ethos was evident in the keynote speeches given at PM16. These sessions featured recognisable, successful podcasters offering up their own narratives about how they got started, how they developed content for their podcast, and how their own commitment to the medium had paid off for them in both figurative and literal ways. The keynote speakers were popular luminaries in the podcasting world, some of whom had spent a decade or more producing podcasts. Others had relatively recently stepped into the role of podcast hosts. The thread that tied all of these speakers together, however, was the fact that they had cultivated large audiences (or, at least large enough to garner the conspicuous attention of major national advertisers).

The keynotes explored some key themes surrounding podcast production—namely, that podcasts are a form of deeply personal, intimate form of creative expression that has unique power to connect listeners to stories. For example, Glynn Washington, host of WNYC radio show and podcast *Snap Judgment* roved the keynote stage with a kind of religious fervour, urging amateur podcasters in the audience to think about their productions as nothing less than the next frontier of narrative, noting:

> I don't care about podcasting! [audience laughter] I don't! I don't care… What I care about is storytelling, and passion, and energy, and magic [audience applause] and that's what you care about as well… There's not enough money here to make us care about anything else. We are here because of that magic, that storytelling, that passion. Because there are easier ways to get paid [audience laughter]. I'm feeling some things as a storyteller. This is a storytelling craft.

Throughout his keynote, Washington explicitly identified podcasting as an immediate, almost visceral form of narrative, something he noted that public media was sometimes lacking. Here podcasting was linked explicitly to other forms of narrative creativity: to novels, to poetry, and to music. Discourses of creativity and passion were paramount in Washington's keynote, and he generally eschewed mass media production models, noting that the best 'inspiration is from amateurs.'

Another common refrain among the keynote speakers was that podcasts were set apart from the typical constraints of commercial or mass-produced media, making them a uniquely *authentic* form of cultural expression. Authenticity is a cornerstone concept within the practice of entrepreneurialism. Among Silicon Valley entrepreneurs, one form of 'authenticity' is being

true to your own ideals and 'following your passion.' As podcaster Kevin Smith enthused in front of a crowd of podcasters at his keynote: 'The medium belongs to you!' Another aspect of authenticity, as Marwick (2013: 251) discovered, involves the 'creation and promotion of intimate knowledge.' In other words, the manner in which Silicon Valley entrepreneurs communicate to others about their efforts should convey not just a desire to start a business and get rich, but to reveal something deep about themselves and their own identity in the process. In the case of podcasting and other Web 2.0 media, the pursuit of authenticity has emerged as a possible remedy to the mass-produced, over-commercialised, cookie-cutter culture of commercial media.

All of the keynote presenters at PM16 described their own version of a 'personal epiphany' moment when they realised that they wanted to pursue podcasting as either a full-time or part-time vocation. This epiphany was typically the result of listening to other podcasts (most if not all podcasters admitted to being heavy podcast listeners as well). Integral to all of these origin narratives was their inspiration to add their own unique voice and perspective to the cultural conversation. Tracy Clayton, co-host of the Buzzfeed podcast *Another Round with Heben and Tracy* explained the transformative effects of podcasting's ability to channel unique, authentic voices and experiences:

> One of the benefits of podcasting is [that] you get to listen. And if you choose to listen to people who live a different life than you do, a different reality than you do, you can learn so much. And when you learn you can start admitting changes in the real world, and we need a lot of those. So, find some Black podcasts, shut up and listen to them. Tell your friends about them. It's a good start [audience applause].

Similarly, Anna Sale, host of the WYNC podcast *Death, Sex, and Money* took the keynote stage to explain that her interest in podcasting sprang from her dissatisfaction with the types of stories that she was able to tell about the people she interviewed as a traditional NPR journalist. She pursued podcasting because she felt that the everyday Americans she covered on the radio had an 'urge to feel heard, the urge to feel connected', and that their authentic stories could be completed told only through the long-form medium of podcasting.

The concept of authenticity was also deployed in other sessions in the PM16 schedule, mainly as a kind of rhetorical bulwark against the argument that podcasters who introduced advertising into their shows would be branded as 'sell outs.' For example, Farnoosh Torabi, host of the *So Money* podcast and

a CNBC financial expert, outlined her initial anxiety about introducing an advertising sponsor on her podcast:

> I had been doing a daily show, literally Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday – for over six months, seven months at this point and I felt like I'd given so much good content for free to my audience that I was worried. I thought, 'Will they disrespect me if I start having sponsors? Am I going to "sell out"? And I thought, no, you know what. In fact, one listener said to me, "Farnoosh, when are you going to have sponsors, because doesn't that legitimise you in some ways? You must not be doing that well if you don't have a sponsor."'

Here the potential anxiety over betraying the authenticity of the host's perspectives on personal finance is neatly dispatched by the deployment of a counter-narrative: that without some sort of commercial validation of her podcast, her content is perhaps less 'legitimate'. As I explore later, the notion of legitimation through monetisation was a strong undercurrent at the largely industry-centred panel discussions.

Other panel sessions emphasised how specific word choices and vocal style of the individual podcast host should be preserved during 'on air' advertising pitches in order to make the pitch request less forced or jarring to the listener. Being 'authentic' in this context meant that podcasters should attempt to use their own words and, if necessary, to manufacture a more homespun enthusiasm for a sponsor's product instead of reading stale and stilted advertising copy. The mantra in these sessions was to 'be true to yourself', all within the context of the commercialisation of the podcast. These discourses of authenticity surrounding podcasting are similar to those uncovered by Duffy (2015) among female fashion bloggers in that any sign of overt commercialism threatens the perceived integrity and originality of amateur-produced media.

Autonomy

Integral to the entrepreneurial ethos of PM16 was the recurring theme of podcasting as a gateway to greater personal *autonomy* in media production careers. Autonomy here refers to the professional liberation of podcasters from the (largely commercial) forces that typically circumscribe creative labour in a market economy. Podcasters taking the stage across PM16 noted that they were fortunate to do this kind of work because they had finally found a career path that allowed them to pursue their passion while also 'paying the bills.'

Even the logo for the conference itself (see Fig. 3.1), a clenched fist with a microphone, served to underscore the ethos of personal empowerment that dominated the convention. The packed keynote by Hollywood actor, producer and podcaster Kevin Smith encapsulated many of these claims. Smith argued that everyone now had access to technologies that allowed them to 'self-express', which allowed for podcasting to be enjoy the status of a uniquely democratic medium. Given his previous experiences as a motion picture

Fig. 3.1 Podcast Movement 2016 logo. (Image taken by the author at the conference)

writer, producer, and actor, Smith focused heavily on the liberation of podcasting from traditional gatekeepers in commercial media. He noted:

> [In] every other medium of self-expression in this world, if you want to say something, you can say it, but if you want to say it on a grand scale, or if you want to write large on a massive canvas that everyone can see, there *will* be a gatekeeper. You can make any TV show you want, but if you want to put it on a network, you're going to encounter someone who'll say, 'Let me see if this is good enough for us.' You can write any book you want and self-publish, but if you want to publish through a label or something like that, there *will* be a gatekeeper. You can make any movie you want, but if you want to put it in a movie theatre, a legit movie house, sooner or later, someone will say, 'Let me see if this is good enough. Let me see if your self-expression counts.' *This medium* had none of that. There's no gatekeeper, man.

Underlying Smith's narrative about the absence of gatekeepers is the notion that online labour can act as liberation from the drudgery of traditional creative work.

Myths of autonomy via entrepreneurial online labour are a recurring theme in Silicon-Valley-style discourses. Indeed, the goal of tech entrepreneurs today has shifted somewhat away from becoming the next tech giant like Apple or Facebook, and instead toward 'having pride in a small business that gives them autonomy' (Heller 2013). Yet, as others have found, the much-vaunted autonomy of Web 2.0 is often accompanied by under-compensated work, wage insecurity, copious amounts of overtime and personal stress (Terranova 2000; Andrejevic 2013; Duffy 2015; Scholz 2016; Duffy and Pruchniewska 2017).

Formalisation of Production Practices: Self-Branding and the Politics of Aspirational Labour

While the keynotes at PM16 celebrated podcasting as an authentic, liberating and uniquely creative practice, the numerous 'how to' demonstrations problematised many of these claims. These sessions, many of which were hosted by 'solopreneur' podcasters, promised attendees a backstage look at specific production practices, covering both mundane topics such as the optimal types of podcasting equipment (microphones, sound mixers, editing software), the mechanics of cultivating advertising sponsors, and audience metrics, as well as more intangible topics such as how to harness one's personal experiences and creativity to create compelling audio content. These sessions featured provocative

titles such as 'Go From Podcaster to Media Superstar', 'Brutally Honest Storytelling', and 'How to Get Off the Plateau and Create a Hit Episode that will Skyrocket your Downloads.' Podcast practitioners and representatives from podcast networks actively socialised attendees into professional production practices that were required to attract advertising support. These 'how to' sessions, then, were the front lines of the broader formalisation effort.

The most prevalent of these discourses was that podcasting was a uniquely meritocratic medium. Consistently, podcasters in the 'how to' sessions emphasised that anyone who put in the hard work required to connect with their listening audience (and, incidentally, who subscribed the speaker's podcast or signed up for exclusive content on their website) would grow the size of their audience. For example, podcaster Daniel J. Lewis held sway with a large audience at his session entitled 'How to make your podcast stand out'. Lewis, the host of his own show entitled *The Audacity to Podcast*, began his session with a series of questions: 'Do you want more listeners? [Audience responds: Yes!] Do you want more money? [Audience responds: Yes!]… Do you want more hard work? [Audience responds: No! Laughs] But here's the truth: You say you don't want more hard work, but it takes work. Don't believe the people who tell you it's super easy.' Lewis went on to describe a number of labour-intensive steps he recommended for podcasters to grow their audience, including managing multiple social media accounts for their podcast (Facebook, Twitter, etc.), engaging in email marketing, producing 'bonus' content in addition to the podcast to send out to email subscribers, and more. 'The secret to getting more,' noted Lewis, 'is giving more.' This was echoed by podcaster, newspaper columnist, radio host and comedian Josh Elledge in his session called 'Go from podcaster to media superstar'. Elledge emphasised that high online visibility was the key to audience engagement:

A lot of us, I think unfortunately, get into the trap where we end up spending so much time on the nuts and bolts of podcasting that we're not growing our business. And so, one thing I would recommend that you do is that you spend twice as much time – this is a good litmus test—*twice* as much time building the business of your podcast than actually working on your podcast.

Elledge noted that the key for independent podcasters was to find ways to market yourself through other media (including more popular podcasts), since cross-promotion was the only way to get known by audiences. As these and other independents urged, podcasting success was found in a mixture of social media omnipresence and self-branding prowess.

The foregrounding of this type of intensive relationship-building labour as part of podcasting entrepreneurship is similar to what scholars have found in other forms of digital content production. In interviews with self-employed female bloggers, for example, Duffy and Pruchniewska (2017) found that these entrepreneurs felt compelled to present themselves continually on social media in ways that reinforced traditional notions of femininity. Specifically, their interviewees felt a need to: (1) engage in 'soft self-promotion' to brand themselves in 'subtle' and 'organic' ways; (2) continually engage in relationship-building activities online ('interactive intimacy'); and (3) maintain 'compulsory visibility' on social media by putting their private lives on display as a means to cultivate an audience. In the largely masculine world of entrepreneurial podcasting, the promotion techniques being advocated at PM16 were certainly not 'soft', but some of the same strategies were emphasised such as: compulsory online visibility, the push to generate 'extra' content in order to entice listeners to subscribe, and developing a long-term relationship with listeners by addressing them directly and personally through multiple online media.

The ultimate goal, of course, was to attract a larger listener base so that podcasters could begin to attract sponsorship and begin to earn money. The 'how to' sessions therefore encapsulated the notion of what Kuehn and Corrigan (2013) term 'hope labor' in podcast production. Hope labour refers to 'un- or under-compensated work carried out in the present, often for experience or exposure, in the hope that future employment opportunities may follow' (Kuehn and Corrigan 2013: 10). Duffy (2015) refers to this intensive labour done in the belief that future economic benefits may follow as 'aspirational labor.' In the emerging commercial podcast ecosystem as discussed at PM16, amateurs were being enticed by the promise of autonomy and creative freedom, yet were also being encouraged to work for long hours with little realistic hope of achieving commercial success.

Podcast Metrics and Monetisation: The Dynamics of Formalisation

The looming, existential question that hung over every session and hallway conversation at PM16 was how to mould podcasting into a reliable revenue-generating medium. Even the conference's wifi password ('getmoney') pointed unequivocally to this goal. Away from the keynote stage, where optimism about the unique authenticity of podcasts held sway, almost all of the panel discussions revolved around the intricacies of attracting advertising revenue.

The key sticking point for many industry representatives (and, by extension, for advertisers) was the lack of common metrics for assessing audience size. Throughout these panels, the message to amateur podcasters was clear: without any data about the size and character of your listeners, or without the visibility and cross-promotion that came with carriage on one of the podcast networks, advertisers would likely pay them little attention. Assuming that podcasters had compiled sufficient data, however, even the lowest bar for minimal advertiser support was still likely out of reach for most independent podcasters. As PM16 demonstrated, the stirrings of interest by advertisers in the podcasting space has begun the process of regularising the use of metrics as well as the adoption of other typical industry practices (such as 'upfront' sales). In these discussions about advertising, the personal, unique nature of podcast production was eclipsed by the standardisation and formalisation of audience metrics.

Podcast Metrics

In my conversations with hosting service representatives and industry professionals at PM16, it became clear that the process of generating, interpreting, and touting data about podcast audiences was a paramount issue. Indeed, a number of panel sessions hosted by professionals working for networks and hosting companies were designed to educate independent podcasters about various measurement techniques and the necessity for quantifying their audience in order to pursue transactions with advertisers. While all PM16 presenters and panellists agreed on the importance of metrics to the development of podcasting as a viable media industry, the definition of those metrics was highly contested terrain. In one session, Edison Research President Larry Rosin outlined a positive outlook for podcasting based upon his company's survey research data. Rosin noted that 21 per cent of a nationwide sample of respondents in 2016 (an estimated audience of 57 million) reported listening to a podcast in the previous month. While Edison's data were referenced often in basic 'proof of concept' pitches from independent podcasters to potential investors, representatives of podcasting hosting firms (like Blubrry, Libsyn and PodBean, among others) to whom I spoke on the convention floor were largely dismissive of Edison's survey data, arguing that only 'hard' data such as subscriber counts and episode download totals (as measured by server log data, which the podcast hosting firms controlled) gave a truly accurate picture of the listening audience. Additionally, the ability to provide varying types of server-based measurements to their podcaster-users was one technique of

hosting companies to differentiate themselves from one another in the competitive market for the business of individual podcasters.

At several industry-specific panels, representatives from podcast hosts, media buying firms, NPR and advertising agencies presented a somewhat united front, noting that the industry was moving in the direction of standardised audience metrics. Many cited the work of the Interactive Advertising Bureau (IAB), which had convened a large working group of companies to hammer out an agreed-upon set of standards (Interactive Advertising Bureau 2017). Steve Mulder, Senior Director of Audience Insights at NPR, laid out this common interest in one panel discussion when he observed that 'without deliberate and thoughtful measurement, without improvements in measurement, the podcast industry won't mature as fast as we want it to'. Despite this mutually understood necessity for standardisation, there is a considerable amount of jockeying among different industry players about which measurement standards should be adopted. NPR, for example, released a 'working document' on podcast measurement in February of 2016, hoping to be the first to influence future discussions about podcast metrics (Wang 2016). NPR's effort was denounced days later by Todd Cochrane (2016), CEO of RawVoice/Blubrry, who labelled NPR's document 'fraught with measurement shortfalls and an inflammatory statement that threatens to undermine the credibility of podcasting and podcast measurement.' At PM16, PodTrac CEO Mark McCrery explained that he and his fellow hosting companies had identified 'unique downloads per episode [a]s the industry standard,' noting that these numbers were 'analogous to numbers that Nielsen and ComScore put out for other media types.' Here the notion that podcast metrics should be roughly analogous to metrics utilised for other online media is an attempt to synchronise podcast measurement with these other forms, allowing advertisers to compare the efficiency of their buys across these forms. The intensity of the debates at PM16 over the establishment of a commercially viable system of audience measurement indicates its importance to the formalisation of podcasting.

Monetisation and Advertising Support

There were many sessions at PM16 devoted to the monetisation of podcasts, many with similar titles such as 'Under the hood: How podcast monetization really works', 'How to sell out while keeping it real: Taking the revenue step', 'How to build an audience and revenue for your podcast', and 'Podcast monetization: The economics of podcasting'. While multiple modes of monetisa-

tion were mentioned throughout the panel sessions, including crowdfunding and 'in kind' sales (through t-shirts and other branded merchandise), the dominant model discussed was on-air advertising. The centrality of advertising as the 'default' funding mechanism for podcasting has invited other structural shifts as well. For example, for the first time in 2015, the Interactive Advertising Bureau (IAB) began hosting an 'upfront' session for advertisers to purchase time on upcoming shows and for podcasters to pitch new podcast series to advertisers (Johnson 2016).

The needs of advertisers for a systematic, predictable environment for pitching products has begun to shift the balance of power away from hosting services and toward podcast networks. Based upon their comments at PM16, advertisers have come to regard podcast networks (like Panoply, NPR or Gimlet Media) as reliable 'tastemakers' for quality podcasts. Advertising sales company executives at PM16 also noted that it was simpler to make deals for sponsorship with networks than with individual podcasters because networks offered them groups of listeners across a number of different podcasts for broader exposure and reach. Due to this new business reality in podcasting, Chris Yarusso, Associate Media Director Mediavest/Spark actively urged independent podcasters to seek carriage on networks, noting that 'being part of a network is probably a smart thing to do so you can get access to brands that won't otherwise find you'. One panel even discussed an emerging subgenre of 'sponsored' podcasts, wherein a sole-sponsored program (General Electric was one example) underwrites and assumes editorial control over the content of the podcast. These types of public relations-oriented podcasts become a kind of 'native advertising' for their sponsor. It is important to note here that the increasing centrality of networks to the podcast ecosystem essentially formalises these networks as distribution gatekeepers, in direct opposition to the kind of freedom and autonomy that Kevin Smith celebrated in his keynote. Likewise, the introduction of fully sponsored content formats challenges the very notion of authenticity that was so central to the utopian discourses about podcasting at PM16.

The industry-oriented panels at PM16 also underscored the instability and precarity of emerging advertising-supported revenue models in the podcasting ecosystem. This precarity was felt by independent podcasters and industry watchers alike. Solo podcasters remarked that their efforts to secure sponsors were stymied until they were able to demonstrate to advertisers that their shows received an average of fifty thousand downloads per episode. A representative from Libsyn noted that *less than 1 per cent* of their hosted podcasts met this minimum episode download threshold. A number of attendees who posted reflections on their own blogs after PM16 expressed some skcepticism

about the viability of an advertiser-supported ecosystem for podcasting. For example, podcaster and entrepreneur Matt Cundill (2016) reflected after the conference that 'no one has figured out how to monetize the medium; which leads to many shared ideas about marketing, promotion and revenue opportunities. A number of podcasters are resigned to not making any [revenue]; satisfied with the branding and exposure for themselves, guests and clients.' Another post-mortem by sports broadcaster and sometime podcaster Jason Barrett noted the one statistic that stood out to him the most: that the broadcast radio industry is a $2 billion annual industry, while podcasting is currently a $100 million annual industry. He offered the following 'reality check' for podcast enthusiasts:

> The world isn't all sunshine and rainbows, and the economic returns in the podcasting world are low compared to radio. If the financial numbers echoed throughout multiple sessions are accurate, that would make the radio industry 20× more profitable than the podcasting business. That's enormous. (Barrett 2016)

More recent digital advertising data has underscored the market difficulties facing digital content producers like podcasters. According to the recent Group M 'Interaction 17' report, while 77 cents of each new advertising dollar in 2017 is expected to be spent on digital advertising, 'more than two-thirds of global ad spend growth from 2012 to 2016' came from just two online services: Google and Facebook (Davies 2017). This type of 'reality check' about the potentially murky future of podcast monetisation was largely muted at PM16, however. Most industry presenters focused on podcasting's huge potential for growth instead of the rather slim chance that most podcasters would be able to eke a living wage out of their hobby.

Conclusion: Formalisation and the Future of Podcasting

The presentations and discussions at Podcast Movement 2016 revealed that podcasting is in the midst of a significant transformation. The professional discourses at Podcast Movement 2016 were characterised by two contradictory impulses: one was a sunny entrepreneurial fervour, while the other was the hard-nosed realism of industry formalisation. On the surface, Podcast Movement celebrated podcasting as an authentic medium that offered a welcome respite from the stale content and rigid professional structures of mainstream broadcast media. Through the keynotes and the on stage 'how to'

sessions, PM presenters largely ignored or downplayed the often-conflicting aims of creativity and commerce. Instead, their presentations captured the entrepreneurial spirit by emphasising the creative freedoms offered by podcasting, the sense of personal and professional autonomy it offered as opposed to a traditional '9-to-5' job, and the joys of creating original content that represented one's true, 'authentic' self. There was a strong counter-narrative within PM16, however. This narrative was prominent on the stages of the panel discussions, most of which were peopled by media professionals working for radio broadcasters, podcast networks, technology companies and advertisers. These panel sessions served to socialise amateur podcasters into the routines and structures of mass media production, to emphasise the importance of audience metrics, and to firmly establish the centrality of advertising sponsorship as the most viable form of revenue support. These efforts are part of a broader effort of formalisation that is currently underway in podcasting.

As scholars of other forms of user-generated digital content have noted (Terranova 2000; McChesney 2013; Duffy and Pruchniewska 2017), the net effect of the formalisation of podcasting may be to effectively curtail many of the imagined freedoms of digital entrepreneurialism. While podcasting networks, hosts and advertisers have brought an influx of capital into the ecosystem, they have also begun to establish themselves as professional gatekeepers for new content and curators of existing content. Some of these companies, like E.W. Scripps, have created synergies across different power roles. Podcasters working with Scripps, for example, have access to the following services all within the same corporate umbrella: an extensive network of other podcasts for revenue sharing and cross-promotion (Earwolf and Wolfpop), an in-house advertising firm specialising in podcasting (Midroll) and a mobile platform for distributing those podcasts (Stitcher, purchased by E.W. Scripps in June 2016). These synergies work to concentrate the resources available to support podcasting into a few companies with deep pockets, creating scarcities that will make it more difficult for amateur, start up podcasters to be able to cultivate a large base of listeners (a prerequisite for advertising support). The effects of formalisation will be felt not just in the economic structure of the industry, but in the content as well. For example, talent scouts for the larger networks will search for podcasts that are similar in style or content to other popular podcasts. This will encourage amateurs to adopt similar formats and content for their own podcasts in an effort to attract the attention and resources that these networks can provide.

Looking to the future, scholars would do well to explore how the shifting dynamics of the medium are shaping individual producers' creative decision-making. How do individual podcasters perceive their own labour within the

shifting context of formalisation, for example? Additionally, once the industry settles upon a set of agreed-upon metrics for measuring audiences, how will this affect the development and continued existence of the hundreds of thousands of podcasts that do not meet the fifty thousand download threshold? Since most of the major podcast distributors such as Apple, Google, and Spotify are US companies, it is possible that the push toward industry formalisation will ripple out to the podcast ecosystems of other countries as well, though this question requires more extensive study. If the discussions taking place at PM16 are a harbinger of the future, then podcasting as a forum for unique and independent cultural expression is at a historic crossroads. On the one hand, podcasting still enjoys a reputation as a home-grown, authentic cultural form created primarily by unpaid amateurs. On the other hand, the increased focus on effective methods of audience monitoring, monetisation via advertising, standardisation of production techniques, and maintaining one's own 'brand' may fundamentally challenge the democratic ethos of podcasting.

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