

Drama Podcasts

**An overview of the US and UK drama
podcast market**



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Contents

Scale of the US Drama Podcast Market	3
Overview of the UK Drama Podcast Industry	11
Independent vs Network Drama Podcast Budgets	18
Top 10 Podcast Dramas in the Last Few Years	22
Map of Drama Podcast Genres	34

Scale of the US Drama Podcast Market

Introduction

Broadly speaking, the audio fiction podcast industry in the US has been through three major historical phases to date. It is now entering its fourth. The first and earliest phase ran from 2008 to 2014, and was dominated by podcasts like *We're Alive*, *Our Fair City*, *The Thrilling Adventure Hour* and *Sayer*. The second phase is defined by the meteoric rise of *Welcome to Night Vale* - which, though it started in 2012, rose to international success in 2014 - around the same time as *Serial*. A slew of major shows quickly followed in 2015, including *The Black Tapes*, *Limetown*, *Tanis* and *The Message*, cementing 2014 to 2016 as a significant period in the history of audio fiction podcasts. From 2016 to 2018, the industry had found its footing somewhat - and we saw a proliferation of smaller, indie shows trying to imitate the success of podcasts like *Night Vale* and *The Black Tapes*. In this third phase, major podcast networks began to invest in serialised drama podcasts on a large scale, bringing in celebrity talent and trying to engage with what seems to be a market experiencing exponential growth.

At time of writing, drama podcasts have been around and reaching audiences on a large scale for around ten years. However, the industry is still a juvenile and developing one. Major network interest has largely been restricted to the last two years, and no fiction podcast has been able to reach success on a level to rival *Welcome to Night Vale*, including those made by Night Vale's creators for the Night Vale Presents network. Large swathes of the industry and its content operate on shoestring budgets, and whilst it is growing, it's certainly not as stable as the non-fiction podcast market yet.

This said, at the end of this document there will be speculation that fiction podcasting is due for its next major phase: and that this looks likely to be its biggest yet in terms of reach, scale and international appeal.

For the sake of clarity, I've divided the following titles into a number of major categories. It's also worth noting that by its nature, any list of major names in the podcast industry cannot be conclusive because of how quickly the industry changes, and because of how much new content is being added internationally, daily. That said, these are broadly speaking the 'household names' of US drama podcasts.

Network Shows

Anecdotally, network shows seem to be more popular with the non-fiction podcast audience than they are with the fiction podcast audience. Because non-fiction podcasts are working, largely, on a far larger scale than fiction podcasts - it's possible that network shows are able to bring in a large section of podcast listeners who would not otherwise listen to drama.

The first major network to invest in drama podcasts was Radiotopia, when it commissioned *The Truth* - an anthology podcast which began in 2012.

Whilst *Welcome to Night Vale* began in 2012, the Night Vale Presents network wasn't formed until 2015. Before that, Night Vale was published by Commonplace Books. In the same year, Panoply partnered with GE Podcast Theater to produce *The Message*.

Following these, in 2016 two more drama podcasts were commissioned by major networks - the most notable of these being *Homecoming*, by Gimlet media, and *LifeAfter* - again by Panoply working with GE Podcast Theater, and published in the same feed as *The Message*. This was also the year that Night Vale Presents commissioned its next two big successes and first original dramas after *Night Vale* itself: *Alice Isn't Dead* and *Within the Wires*.

In 2017, the BBC partnered with Panoply to create *Tumanbay* - which is the most successful drama podcast commissioned by the BBC in the US to date.

In 2018, three more drama podcasts were commissioned by major networks. Gimlet released its second drama, *Sandra*, and Radiotopia released its second anthology drama, *Everything is Alive*. We also saw the Maximum Fun network formally enter the market with *Bubble* (whilst it's possible to make a case for the actual-play Dungeons and Dragons show on the network, *The Adventure Zone*, being an audio drama, this was Maximum Fun's first official serial).

Though it's a little early to know how successful they might be, this year also Stitcher entered the fray with *Wolverine: The Long Night*, and CBC came in strong with *The Shadows*. Things look especially good for *Wolverine*, which has already announced work on a second season.

Looking to the future, Panoply had recently announced that Lauren Shippen (of *The Bright Sessions*) had been commissioned to create a drama series called *Passenger List* with Mara Wilson and John Dryden, starring Kelly Marie Tran and Colin Morgan - however Panoply also recently closed its original content arm. What will become of the show now is unknown.

Finally, there was an article published earlier this year suggesting that Apple itself had commissioned Reese Witherspoon to Executive Produce a crime drama starring Octavia Spencer, though no further news has been released on this subject¹.

Independent Shows

Following the three major phases of podcast drama outlined in the introduction, independently produced drama podcasts have been in fairly rude health for nearly a decade now. The first large scale successes were *We're Alive* (beginning in 2009), *The Thrilling Adventure Hour* (beginning in 2010), and *Our Fair City* (beginning in 2012). *Welcome to Night Vale* is also included in this set, also beginning in 2012.

In 2013 came *The Once and Future Nerd*. In 2014, we saw the launch of *EOS10*, *PleasureTown* and *SAYER* and then in 2015, a large number of major independent drama podcasts were

¹ According to [this article from InStyle](#), published earlier this year

released. These include *Limetown*, *King Falls AM*, *The Black Tapes*, *TANIS*, *The Bright Sessions*, *Wolf 359*, *Hello from the Magic Tavern*, *Alba Salix* and *Ars Paradoxica*.

The 2015 slate of major shows is a milestone in the history of drama podcasts in the US, and from this point onwards they proliferate.

In terms of big titles, 2016 saw the release of *Archive 81*, *Greater Boston*, *The Penumbra Podcast*, *Small Town Horror*, *SPINES*, *Mabel*, *Subject: Found*, *Uncanny County*, *The Blood Crow Stories* and *Darkest Night*.

Then in 2017 came *The Big Loop* (by *The Black Tapes* creator Paul Bae), *What's the Frequency?* (by James Oliva of *Greater Boston*), *Bronzeville* (created by KC Wayland of *We're Alive*), *The Far Meridian* (produced by Mischa Stanton, who created *Ars Paradoxica*), *Steal The Stars* (by Mac Rogers of *The Message* and *LifeAfter*), *Girl in Space*, *Marsfall*, *The Strange Case of Starship Iris*, *Violet Beach*, *Station Blue*, *Palimpsest*, *The Hyacinth Disaster*, *The Phenomenon* and *The White Vault*.

The industry continues to grow at an exponential rate, but some of the many names that have come up in 2018 include: *2298*, *Kalila Stormfire's Economical Magick Services*, *Tides*, *Startripper!!* and *The Cryptonaturalist*. This year also marks the return of a number of major shows previously thought to be discontinued, which has been the source of a great deal of excitement and speculation among creators. These include *Limetown*, *The Thrilling Adventure Hour* and *EOS 10* - all of which are seen as iconic in the world of drama podcasts.

Looking ahead, there's an increasing atmosphere of collaboration and communication between drama creators, and it's suspected that this will do wonders for the quality of content being produced as independent creatives pool knowledge and resources. We're already beginning to see this with shows like *MagicKingDom* and *Janus Descending*, and it's likely that there will continue to be more collaboration in drama podcasts' immediate future.

Established Creatives and Deals

There are a number of big names in podcasting, and they have substantial influence on popular genres, styles, formats and even creators' behaviour on social media. Foremost among these are, of course, the creators of *Welcome to Night Vale*, Joseph Fink and Jeffrey Cranor - although it's worth noting that until recently, Fink and Cranor had chosen to engage publicly on social media with other creators very rarely.

It's difficult to suggest exactly how much influence Griffin, Travis and Justin McElroy have on the audio drama community - it's one with which they do not seem to try and actively engage, however many podcast drama creators and fans of *The Adventure Zone* consider the McElroys to be audio drama creators and influencers.

Similarly, Justin McLachlan, creator of *EOS10*, interacts with drama creators fairly rarely in a public forum - although this might have something to do with the fact that until recently, *EOS10* was believed to have been finished for good. KC Wayland, creator of *We're Alive* and

Bronzeville is fairly isolated from the audio drama community, however a lot of people consider him and his work to be an influence on the podcasts they produce. John Dryden, of *Tumanbay*, also has a fairly quiet digital presence - though his academic and curatorial approach to the space is significant. Christopher Littler of Two-Up Productions (responsible for *36 Questions* and *Limetown*) also interacts fairly little with the audio drama community in a public forum.

However all of these people have repeatedly delivered talks, workshops, and judged competitions centred around drama podcasts. For this reason, they are not only established creatives in the space, but people who are actively shaping where the medium is going.

Arnie Niekamp and Adal Rifai of *Hello from the Magic Tavern* are more socially engaged than those mentioned above, although they still keep a fairly conservative digital presence. Ben Acker of *The Thrilling Adventure Hour* has a dedicated following of audio drama creators, however like Justin McLachlan, up until recently it was believed that he'd left the drama podcast space.

The most engaged, established creatives in the drama podcast space are Paul Bae, creator of *The Black Tapes* and *The Big Loop*; Gabriel Urbina, creator of *Wolf 359* and Lauren Shippen, creator of *The Bright Sessions*. Like those listed above, all of these people regularly deliver panels, workshops and talks at various conventions and festivals on the state of drama podcasting and where it might be going.

On a somewhat smaller scale: Mac Rogers of *Steal the Stars*; Mischa Stanton of *Ars Paradoxica*, *The Far Meridian*, *The Bright Sessions* and *Startripper!!*; Sarah Rhea Werner of *Girl in Space*; David Rheinstrom of *Radio Drama Revival*; James Oliva of *What's the Frequency?*; Marc Sollinger and Daniel Powell of *Archive 81* and Eli Horowitz of *Homecoming* all exert greater and lesser influence on the drama podcast space in the US.

In terms of deals, the two most common media deals at the moment for drama podcasts in the US are publishing deals and TV adaptations. The shows that have been optioned for TV include: *Homecoming* (Amazon Prime), *Welcome to Night Vale* (not confirmed), *TANIS* (Syfy), *The Black Tapes* (NBC), *The Bright Sessions* (Syfy), *Limetown* (Facebook) and *Alice Isn't Dead* (Syfy). It's worth mentioning that in this list, Universal Cable Productions has invested in *Homecoming*, *The Bright Sessions*, *TANIS* and *Alice Isn't Dead*. Interestingly however, *Welcome to Night Vale* has been grabbed by FX and Sony Pictures Television.

Thus far, TV adaptations of podcasts have not gone particularly well - Gimlet's *Alex, Inc.* and Aaron Mahnke's *Lore* were both not the runaway successes people hoped they would be. However, *Homecoming* is the first drama podcast to make it to the small screen - it was released on Amazon Prime on 2 November 2018 - and so far has received a positive critical response.

On the publishing side of things, Harper Perennial has published novelisations and companion books to *Welcome to Night Vale* and *Alice Isn't Dead*, Simon and Schuster has published the prequel to *Limetown*, and Tor Books has taken *Steal the Stars* and a trilogy for Tor Teens based on *The Bright Sessions*.

Robustness of the Indie Sector

As mentioned in the introduction, the indie drama podcast sector in the US - despite its size - is still very much in the early stages of its development. The amount of money that creators can make through websites like Patreon, for example, is relatively little when contrasted with the modern media landscape as a whole. However, the return of classic drama podcasts once thought discontinued; increasing investment by celebrities and major networks; the success of live events and touring shows; as well as a continuous willingness by businesses outside of the audio industry to produce multimedia expansions of drama podcasts - suggests that this sector is one considered to be significant, fertile and profitable.

Because things like profit margins on podcast advertising, touring shows and merchandise are not publicly available, instead a case has been made in the following pages based on various sources for the robustness of the indie sector.

Health Warning: Patreon, Kickstarter and Indiegogo

One of the most popular methods of monetization in the indie drama podcast industry is the US is to use crowdfunding platforms. Of those shows which have made their monthly pledges publicly available, the most successful podcast the author can find is *The Penumbra Podcast*, which makes \$4,012 per month from 666 patrons. After this, *Wolf 359* made \$3,384 per month for 900 patrons; *King Falls AM* makes \$3,222 per month from 429 patrons, *Girl in Space* makes \$1,101 per month from 320 patrons and *Archive 81* makes \$1,011 per month from 306 patrons.

Within the Wires is the only Night Vale Presents show to have a Patreon account, and whilst it has 424 patrons, its creators have chosen not to make their donations public. Lauren Shippen has 1,264 patrons - however she has also chosen not to make their donations public.

When *The Black Tapes* ran a kickstarter for its second season in 2015, it made \$10,666 against a funding goal of \$7,500, which is roughly equivalent, and a little lower than, the success seen by British drama podcasts' fundraising efforts (in particular *Wooden Overcoats* and *Victoriocity*, both of which raised over £10,000).

The health warning comes in regard to PodCon - PodCon was meant to be the US' first dedicated podcast convention, with an attitude that was more like San Diego ComiCon than an industry event like Third Coast Festival. It was the brainchild of Joseph Fink, Jeffrey Cranor, John Green, Hank Green and Griffin, Travis and Justin McElroy. Whilst it covered all genres of podcast, there was a significant space made for drama podcasts. As mentioned above, between them Fink, Cranor and the McElroys are some of the most influential creatives in the world when it comes to podcast drama.

However, both the first and second PodCon crowdfunding campaigns failed to reach their goals. In its first year, PodCon (which was crowdfunded on Indiegogo), raised only \$243,746 of its \$300,000 funding goal from 3,022 backers. In its second year it was more successful, however it still missed out on its target - raising \$299, 569 out of \$300,000 from 3255 backers. The

number of backers for the convention - which is due to take place in January 2019, only saw a 10% increase, and this is less growth than might have been expected.

Live Shows and Events

With the above in mind, typically drama podcasts in the US have seen widespread success when it comes to running tours, live shows and events. The first of these was *The Thrilling Adventure Hour*, which was conceived as a theatre show recorded live and reproduced as a podcast. After this, the first podcast that ran live shows on a major scale was *Welcome to Night Vale*, which has done over 300 live shows in over 40 countries. Night Vale frequently performs on the US convention circuit - famously doing a crossover episode with *The Thrilling Adventure Hour* early on at San Diego Comic Con. In 2014, the podcast sold out across the USA, and it continues to repeatedly sell out.

The second most successful drama podcast in terms of US tours is *The Adventure Zone*, although the McElroys have not yet taken the show onto an international stage, and it seems unlikely that they will. This has more to do with the fact that the arc of the show they've been touring has been over for nearly a year now - the McElroys continue to repeatedly sell out their live shows, as well as everything remotely to do with the show, up to and including discussion panels about their graphic novel adaptation.

Hello From the Magic Tavern is another major show which repeatedly does live shows across the US, and sometimes internationally - although it's on a somewhat smaller scale than *Night Vale* and *The Adventure Zone*.

It's also worth mentioning here that so-called actual play podcasts (shows where people record themselves playing tabletop roleplaying games like Dungeons and Dragons) are increasingly popular as live events. Arguably, this has a lot to do with the runaway success of the Youtube-series-come-podcast, *Critical Role*, which receives millions of views each week. An example of this emerging market was the recent *Join the Party* live show, which despite being a relatively small scale podcast drew in audience members from across the United States.

Celebrity Investment

Often, podcast live shows have featured celebrity guests - some of the most significant of these include Lin Manuel Miranda, at a recent readthrough of *The Adventure Zone*, Molly Quinn in *The Thrilling Adventure Hour* and Khary Payton on *Critical Role*. Typically celebrity guests are TV or video game actors, and they're often already popular with a drama podcast audience.

However, these are not the only ways in which increasing numbers of celebrities are turning their interest to drama podcasts specifically. RuPaul and Lee Pace have been making a horror anthology podcast called *Darkest Night* since 2016, Reese Witherspoon is allegedly executive producing a crime drama podcast starring Octavia Spencer for Apple, *36 Questions* starred Jonathan Groff, and John and Hank Green themselves are minor celebrities in their own right. The fact that *Bronzeville* was able to attract talent including Laurence Fishburne, Larenz Tate and Tracee Ellis Ross as a non-network show is itself a point of interest.

Then of course there are the star-studded casts of some of the major network shows: *Homecoming* starred Oscar Isaac, David Schwimmer, and Amy Sedaris; *Sandra* featured Kristen Wiig and Alia Shawkat, and *Wolverine: The Long Night* has Richard Armitage as Logan.

As these shows continue to make waves on an international scale, it seems likely that we will see more celebrity investment in future - and the willingness of people with profiles as high as these to invest in the sector seems to say something about its stability.

Multimedia Expansions

This has been mentioned briefly above, but various drama podcasts in the US have secured both TV and publishing deals. Universal Cable Productions dominates the podcast to TV adaptation niche, having snapped up *The Bright Sessions*, *TANIS*, *Alice Isn't Dead* and *Homecoming*.

On the publishing side of things, Harper Collins and Simon and Schuster have thrown their hats into the ring, carrying *Welcome to Night Vale* and *Limetown* respectively. Tor Books seems to be doing interesting things - it created Tor Labs specifically to produce *Steal the Stars* as part of the novel's release, and more recently commissioned a trilogy of young adult books set in the world of *The Bright Sessions*.

In terms of the robustness of the indie sector, there's a lot to be said for the increasing number of non-radio companies looking to invest in drama podcasts. The most notable of these in the past year would be Marvel, and its decision to produce *Wolverine: The Long Night*, however it's also of interest that Amazon Prime will be hosting *Homecoming*, Facebook has taken *Limetown*, and Syfy will apparently be carrying a full slate of podcast adaptations.

Not to mention, with the Dark Horse graphic novel adaptation of *Critical Role*, there seems to be interest from the comic industry in bringing podcasts into that space. It'll be interesting to see whether any other major comic or graphic novel house decides to follow Marvel into the brave new world of making a drama podcast themselves.

Similarly, it'll be interesting to see whether publishers investing in drama podcasts like Harper Collins and Simon and Schuster will experiment with the example set by Tor Labs, and begin release short drama series in conjunction with new novels set in the same universes.

Estimate on Podcast Numbers

Because drama podcasts tend to fall into the iTunes arts category - and only recently received a collection of their own (Modern Radio Drama), it's difficult to obtain figures on the number of drama podcasts currently extant. Add to this the fact that there are a lot of podcasts, like improvisational shows and actual-plays, which blur the line of where a drama begins and ends - this number gets even more unsteady.

That said, based on publicly available twitter lists collating dramas which have their own accounts, it's reasonable to estimate that there are between 500 and 600 drama podcasts currently extant². If anything - since many dramas do not have their own twitter accounts, this might be a conservative estimate, although it's difficult to be certain of this supposition.

² This is based on the list [Audio Fictions by Elena Fernandez](#) - which has 594 members at time of writing, and [Audio Fiction by Daniel French](#) - which has 621 members at time of writing.

Overview of the UK Drama Podcast Industry

Like anything in podcasting, this is a constantly shifting landscape - and whilst there are certainly major figures and 'household names', these are liable to change. With this said, broadly speaking, the following is a brief summary of the UK's audio drama landscape as it stands now.

As in all areas of podcasting, download figures are rarely available. So the 'size' of a show has been judged, roughly, by factors such as: the decision to run live events; download figures, if available; Twitter and general social media followings; appearances at podcast festivals etc as guest speakers; and broader informal experience of which shows tend to appear in online and real-life conversations about audio drama.

It's worth noting that whilst there is a cluster of independent audio drama from the UK that seems to have tapped into the US podcast drama audience, there are also several major drama podcasts which seem to have found entirely separate communities. The creators of these shows very rarely interact with the rest of the creative community, if at all. Similarly, as a rule, there doesn't seem to be much conversation between the producers of shows made by large networks or on major budgets (such as the BBC productions) and the indie community.

As it stands, therefore, audio drama in the UK exists in several distinct spheres - each of which seem to have their own major players, and most of which rarely communicate with one another. These have been navigated as effectively as possible to provide a brief, readable summary.

A Note on Genre

There is a very fine line between audio drama and other forms of fiction podcast: for example, podcasts in which people read aloud short stories, poetry, and improvise monologues are very popular, but are not necessarily what the audio drama community would consider to be audio drama. For this reason, podcasts like *Imaginary Advice* and *The Other Stories* have not been included in this brief - but it's worth noting that these are very large shows with significant followings which, in the broadest sense, might be considered to be audio drama.

Perhaps the greatest point of contention here (though there are several, the field of podcasting's nominal semantics is a murky and treacherous one) is at what point comedy becomes drama. There's a strong argument to say that *The Beef and Dairy Network* podcast could be construed as a drama. For the sake of this document, it is classed as comedy, and not comedy drama - but it is of significant cultural standing in the drama podcast space both nationally and internationally.

There is also the question of so-called 'actual-play' podcasts, in which people record themselves playing Dungeons and Dragons, or other tabletop roleplaying games, and improvise

a narrative. There's a note at the end about these shows, however they've not been included in the overview of audio drama.

Finally, *Wireless Theatre* is certainly one of the biggest podcasts in the UK producing audio drama. However, as a subscription service and production company - at this stage it's more akin to a network than a single distinct serialised drama. As such it has not been included here.

The Biggest Shows in the UK

Shows mentioned here: *Wooden Overcoats*, *The Magnus Archives*, *Marscorp*, *A Scottish Podcast*

In terms of both local and international reach, the biggest podcast dramas that have come out of the UK in the last five years are *Wooden Overcoats*, *The Magnus Archives*, *Marscorp* and *A Scottish Podcast*. It's worth noting that *Marscorp* was produced by Definitely Human, a production company based in the UK which recently took over *The Monster Hunters*, a smaller but growing show. On this list *A Scottish Podcast* is the smallest, and *Wooden Overcoats* and *The Magnus Archives* are vying for first place - but both appealing to very different audiences. *The Magnus Archives* has a substantial fan community on Tumblr, whereas *Wooden Overcoats* seems to be more popular with a wider range of podcast audiences.

A note on success is worth adding here. *Wooden Overcoats* hit number 1 in Ireland just before it was featured on NPR's *Pop Culture Happy Hour*, after which it made it into the top 100 US podcasts, and saw an even greater level of reach and success than that which it had already achieved, which was substantial³. A lot of speculation has been made about how and why this happened: whether it was simply a matter of time (*Wooden Overcoats* began releasing in 2015, something of a golden era for audio drama), or a question of tone (season 3 of *Overcoats* being by far its most emotive and sincere season yet). It's also worth noting that in the off-season, *Wooden Overcoats* released mini episodes by podcast drama influencers like Lauren Shippen (creator of *The Bright Sessions*) and Gabriel Urbina (*Wolf 359*). Either way, 2018 certainly saw the show begin to reach its greatest potential, and it'll be interesting to see what happens if or when the show decides to make a fourth season.

The Magnus Archives, on the other hand, had been simmering on an apparently small scale for a while. It's been going since 2016 and since then has released at time of writing a truly overwhelming 120 episodes. Furthermore, unlike the creators of *Wooden Overcoats*, the producers of *The Magnus Archives* - Rusty Quill, very rarely interact with the UK podcast community. However, this year saw the show reaching international fans on a much larger scale than it or most other UK podcast dramas have before. It now makes \$4,382 a month on Patreon - which is on a far greater scale than any other UK podcast drama and even several of the US podcast dramas. It's unclear exactly how they achieved this level of success - whether it was sheer volume of content or timing, again - however it is worth noting that for some time fans of the show on Tumblr had speculated that the show's protagonists were gay or bisexual. These characters had previously been assumed straight and cisgender, and there was little to nothing

³ A note of warning must always be made about the reliability of the iTunes charts, which can be wildly unpredictable, and must only be used as a very broad possible indicator.

in the show itself to suggest otherwise. Earlier this year, *The Magnus Archives* made it explicit that three of its main characters were gay, asexual, and bisexual respectively. The show also features a young Muslim woman as a main character. Immediately after this occurred, fans began to produce fanart for the show on a major scale, which in turn led to more people discovering the podcast and creating their own content, etc. Whilst there is no hard evidence to prove this correlation, it's difficult not to suspect an element of cause and effect. (It's worth noting that *Welcome to Night Vale* saw success immediately after becoming big on Tumblr, something that Joseph Fink and Jeffrey Cranor have repeatedly stated in interviews.) From the outside, it looks like *The Magnus Archives* realised that its audience was primarily interested in different identities than those it had originally pitched for its characters, and adjusted their course accordingly. If this is the case, it was extremely effective. However it's also worth mentioning that it's entirely possible these identities had been planned from the show's inception - it'll be interesting to see whether the creators choose to discuss the subject, or leave it open to interpretation.

Most recently, *Marscorp* was featured in Vogue magazine as a podcast to listen to - though it hasn't been updated for some months, as the podcast is currently producing its second season. The creators of *Marscorp*, Definitely Human, are particularly good at branding and marketing their shows - they make \$960 a month on Patreon. Whilst this might be down to the sheer volume of content they've produced (they also made *The Bunker* in 2014 and the actual-play international success *The Infinite Bad*), it does also seem to be because they know how to make eye-catching imagery and how to make things like Patreon support worthwhile for their fans. Like Rusty Quill (of *The Magnus Archives*), Definitely Human have rarely interacted with the UK podcast community in general, although the team are now beginning to reach out more to other creators.

A Scottish Podcast's success might, again, seem to be a question of timing - and the fact that for some time this was the first Scottish independent podcast drama (the second was *Tin Can*). But like *We're Alive*, *A Scottish Podcast* seems to be hitting a different audience to those apparently reached by shows like *The Magnus Archives* or *Welcome to Night Vale*. Specifically, *A Scottish Podcast* seems largely to be popular with a predominantly male, over-35 audience.

Mid-Level UK Shows

Shows Mentioned Here: *Victoriocity*, *We Fix Space Junk*, *The Unseen Hour*, *Gamma Radio*, *The Orphans*, *66B*, *Hector vs The Future*, *The Monster Hunters*, *Tin Can*

There are several smaller, newer and growing UK podcast dramas - and the independent scene is a rapidly growing one, especially in 2018, with a slate of new shows due to be released over the next six to 12 months. Of this bracket, the largest shows in terms of not only downloads but also social media presence, live shows, and international reach are: *Victoriocity*, *We Fix Space Junk*, *The Unseen Hour* and *Gamma Radio*. Of these, *Gamma Radio* is isolated from the rest of the podcast scene - and it's difficult to see exactly how big the show is, because they have not released download figures or run any live events. This said, they're certainly a name in the UK podcast community, and have a sizeable social media following.

From this list, *Victoriocity* would be the biggest 'household name'. It's a show which has found popularity with American audiences, which has already run several live events, and which exceeded its funding goal by £2,000 on Kickstarter for its second season. *Victoriocity* features Tom Crowley, an actor who also plays a leading role in *Wooden Overcoats*. The show is managed by Liz Campbell - who also runs the business side of things for *Wooden Overcoats* and recently was involved in Acast and WiseBuddah's 'Startup' competition with Zachary Fortais-Gomm, creator of *The Orphans*, with a script which made it to the competition's final round about toxic masculinity called *The Boy Problem*.

The Unseen Hour started, like *Gamma Radio*, in 2017 - and is somewhat different to the other shows on this list in that it is performed as a live theatre show monthly in London at the Rosemary Branch theatre. This year it did a free show at Edinburgh Fringe Festival, and notably featured a guest monologue by drama podcast superstar Cecil Baldwin (the voice of *Welcome to Night Vale*). *The Unseen Hour* was originally produced by Andy Goddard, one of the producers of *Wooden Overcoats*, and has featured guest monologues written by various podcast drama creators, including writers from *Wooden Overcoats*, *We Fix Space Junk*, *Tin Can* and *Victoriocity*.

Of all the shows on this list, *We Fix Space Junk* is the smallest and the newest - it has never run a live show, though it's slated to do its first at Pod UK in Birmingham in February 2019. The show has already finished releasing its second season (its first began in March this year, it then released a mini series through June and July, before beginning its second season in September) and that season featured a large number of big names in podcast drama. These include voices from *Wooden Overcoats*, *The Unseen Hour*, *Girl in Space*, *Tides*, *Here Be Dragons*, *Tin Can*, *Middle: Below* and more. The success of *We Fix Space Junk* seems likely to be a result of the sheer volume, speed and consistency of its content - as well as a very effective marketing and social media campaign. In a matter of months, it's built a bigger following than many UK shows which have existed for several years, and its creators: Beth Crane and Hedley Knights, have become familiar names both nationally and internationally on the indie scene.

In addition to the shows listed above, the following should also be included as 'mid-level' UK drama podcasts: *66B*, *Hector vs The Future*, *The Orphans*, *The Monster Hunters* and *Tin Can*.

Of these, *Hector Vs The Future* has been over for some time, and its creators are not interested in making any more audio drama at present.

The Monster Hunters was recently taken over by Definitely Human (creators of *Marscorp*) and will likely see a greater level of success because of it.

66B is another show which has historically been fairly isolated from the UK podcast community, although its creators also run a true crime podcast called *Spree*, and it may be that they see some overlap of audiences there.

Tin Can was the second big Scottish audio drama, and its creators are now releasing a new show called *Middle: Below* which is growing in popularity - the team are increasingly involved in the UK podcast community.

The Orphans this year began releasing its third season, and in terms of download figures is larger than *Victoriocity* - with over 300,000 downloads to date. It's been part of the US-based Nerdy Show Network since its inception, though recently both the show and the network have migrated to Acast. Where *The Orphans* had previously failed was in its digital presence, which until recently had been quite small - however it's been growing rapidly in the past few months and, like *We Fix Space Junk*, is due to perform its first live show at Pod UK in Birmingham next year.

Most Established Creatives

Key Names Mentioned Here: *Andy Goddard, David K. Barnes, Liz Campbell, Felix Trench, David Knight, David Price, Tom Dalling, Maxamillian John, Alexander J. Newall, Jonathan Sims.*

In light of what's been outlined above, by far the most established creatives on the UK's independent podcasting scene are the team behind *Wooden Overcoats*, the Definitely Human crew, and the minds behind Rusty Quill - however all of these people operate in quite different arenas. It's also worth noting that newer but significant voices include the makers of *We Fix Space Junk, Victoriocity, Tin Can* and *The Unseen Hour*.

By far one of the most established creatives in the independent UK podcast drama scene is Andy Goddard - co-producer of *Wooden Overcoats* and producer of *The Unseen Hour* and *Hector vs The Future* (all of which are listed above). Andy is repeatedly invited to speak at events focused on audio drama, and is a well known figure in the community. He is, however, arguably no longer a member of the independent scene, having recently been hired by the BBC as a producer.

The other three major creatives on the podcast drama scene from *Wooden Overcoats* are David K. Barnes - a widely respected writer within the British podcast community; Liz Campbell - the business mind behind a variety of podcasts with international connections; and Felix Trench - a voice actor who also co-ordinates one of the world's biggest digital audio drama forums, the Audio Drama Slack, and as a result knows the majority of the world's most successful podcast drama creators personally.

Another major force in UK podcast drama are the Definitely Human team: the minds behind *Marscorp* and *The Infinite Bad* (a very successful actual-play podcast, not included above for this reason but on a similar level of popularity). The team is David Knight, David Price, Tom Dalling and Maxamillian John, as well as a large number of other contributors. Whilst Definitely Human does not tend to move in the same circles as the majority of UK drama podcasts, it has a significant amount of influence in its own right - as evidenced by the fact that its taking on and re-mastering *The Monster Hunters*, already a reasonably successful podcast.

Like Definitely Human, Rusty Quill - the creators of *The Magnus Archives* - are a major force in podcasting, but rarely interact with the UK podcast community. By far it makes the most money from community support, earning \$4,328 per month from 802 patrons, a sum that easily rivals even major players in US podcasting. Unlike most podcasts, Rusty Quill is able to pay all of its

creators, and recently partnered with Historic Royal Palaces to produce the *Outliers* podcast - a historical fiction series. *The Magnus Archives* has a large team, but of these the key players are Alexander J. Newall - founder and creative director of Rusty Quill, and Jonathan Sims - writer of *The Magnus Archives*.

Mid-Level Creatives

Key names mentioned here: *Jen Sugden, Chris Sugden, James Carney, Beth Crane, Hedley Knights, David Devereux, Zachary Fortais-Gomm*

In addition to the biggest names in the space outlined above, there's a robust community of established mid-level creatives on the indie UK podcast drama scene. Of these, perhaps the most well connected and far reaching are Jen and Chris Sugden, creators of *Victoriocity*; James Carney, creator of *The Unseen Hour*; Beth Crane and Hedley Knights, creators of *We Fix Space Junk* and David Devereux, creator of *Tin Can* and *Middle: Below*.

Of this list, Jen and Chris Sugden are very well respected and increasingly known within the podcast community; James Carney has worked with a lot of podcast dramas (*The Unseen Hour's* guest monologue segment has largely facilitated this); Beth Crane and Hedley Knights have also worked with a wide range of creators, and David Devereux is one of the most established creatives in the space in Scotland.

Increasingly, Zachary Fortais-Gomm, creator of *The Orphans* is involved in the UK podcast drama scene - and is worth including here for his involvement with various production companies (most notably the LaunchPod competition) as well as his presence in the space internationally (Zachary has also worked as a producer of the mid-level US podcast *Small Town Horror*).

Additional UK Podcasts

Key Shows Mentioned Here: *LucyD, I Am in Eskew, Middle: Below, Kane and Feels*

As well as the shows outlined above, there are roughly 32 extant independent UK podcast dramas at the time of writing. Of these, dramas worth highlighting include *LucyD* - Ireland's biggest independent podcast drama; *I Am in Eskew* - a very interesting experimental British horror drama; *Middle: Below* - produced by the crew of *Tin Can* and due to do their first live show in early 2019; and *Kane and Feels* - a rapidly growing drama made by two independent radio producers (unlike most drama podcasts).

Other UK podcast dramas include: *The Family Tree, At The End of the Line, The Aletheian Society, Diary of a Space Archivist, Escape Velocity, The Other 1%, Outliers, Aethuran: Dark Saga, Blood Culture, Hostile Worlds, The Bunker, Portentous Perils of the 22nd Century, Glasgow Ghost Stories, Unbound Sketchbook, When the Page Talks Back, and The Future Boys*.

Two podcasts which are due to be released in 2019 and look set to reach at least mid-level success are *Oblivity* and *Calling Darkness*.

Actual Play Podcasts

Whilst they haven't been included here, actual-play podcasts tend to occupy a very similar space to audio drama and often find popularity with audio drama audiences. There are several UK based actual play shows, and these include: *Chaotic Adequate*, *Tails from the Dark Dragons Inn*, *How We Roll*, *Modified Roll* and *Dead Horse*.

Independent vs Network Drama Podcast Budgets

Introduction

It's important to note at the offset that for obvious reasons, drama podcasts do not make information about their budgets publicly available. Therefore, a great deal of what follows has to involve some amount of extrapolation and speculation. With this said, all estimations are based on what data is publicly available, as well as anecdotal experience from working in the drama podcast sector.

By and large, most podcast dramas are made with little to no budget at all. Writers, producers, and actors are largely paid in good will - and there's a great deal of in kind skill exchange as well. For example: most podcast producers cut and edit voice reels for their actors in place of payment. Zachary Fortais-Gomm of *The Orphans* works in post-production for TV, and does the same with video reels and short films. It's informally considered a mark of success in the UK for a mid-level to major podcast drama to be able to pay travel expenses, and most festivals and events which ask dramas to perform do not offer even this much.

If or when the very rare UK drama podcast and slightly more common US drama podcast *is* able to pay its actors, producers, writers, composers and so on - it is almost never industry standard. Even the biggest shows in the UK, like *Wooden Overcoats*, endeavour to pay their teams something between minimum and living wage. And even then, creators who dedicate significantly more time outside of the recording process often sacrifice vast sums of their time and hypothetical pay-cheque in order to allow a drama to break even. Often, even when selling tickets at live events, drama podcasts and their creators pay to exist in the UK, rather than get paid.

This situation is slightly different in the US - there are a larger number of shows which are able to make (usually) a modest amount of profit from their podcasts. This is managed in a number of ways: Patreon and Kickstarter are the most popular crowdfunding platforms for podcasts, but increasingly merchandise is a major source of revenue. TeePublic tends to dominate this market - although some podcasts have decided to host and sell their products elsewhere. Whilst advertising is popular and increasingly pervasive thanks to the existence of dynamic ad insertion platforms like Acast, it rarely constitutes the majority of a drama podcast's revenue. If a podcast is making money in the US, there is an expectation that the actors at the very least will make something closer to industry standard and further from minimum wage. Composers are also highly valued - but things get hazier around writers and producers, who unless they've achieved a modicum of podcast celebrity (Lauren Shippen, Mac Rogers, Gabriel Urbina) tend to again take docks to their own pay in order to enable their projects to exist.

Of course, outside of the indie podcast scene, podcast networks are able to dedicate significantly larger lump sums of money up front to podcast dramas. Against, whilst details on expenditures are not publicly available, these seem by and large to go towards hiring big

celebrity talent and securing access to and use of high quality studios and equipment - as well as presumably managing to pay everyone involved something much closer to industry standard rates.

There's obviously an element of financial jeopardy here. Whilst the skill exchange and trade system largely works on a micro-indie level, it means that most people working on drama podcasts in both the UK and the US are holding down one or more part-time or full-time jobs in order to sustain themselves. This has an impact on what creators can commit to, and often has knock on effects on things like episode releases and the ability to run live shows.

All this is to say that whilst most drama podcasts are made on a shoestring budget, and most drama podcasters will likely tell you that regardless of what happens they can and will make their show on a shoestring budget - most of them do not want to have to do this in the long term, and practically cannot sustain it. For this reason, often drama podcasts swing one of two ways: announcing that they will have to crowdfund subsequent seasons or not make them, in order to at the very least pay their teams minimum wage; or passing quietly into oblivion, as their creators move on to different, bigger, and more financially viable projects. There are a lot of podcasters who will continue to make their dramas no matter what, given half a choice: the question of budget, however, means that choice is not always open to them - whether they like it or not.

The Issue of Scale: UK vs US Indie Drama

As a quick cross-section of scale, here are some brief figures which are publicly available regarding UK drama podcasts and what they're able to make.

Mid-level shows like *The Unseen Hour* and *The Orphans* make \$37 per month and \$22 per episode respectively on Patreon. Neither are able to pay anyone involved in their shows any kind of wage. These are both shows which have had over 100,000 downloads. (*The Orphans* has had over 300,000). The most successful of the mid-level UK shows in terms of finance is *We Fix Space Junk*, which makes \$152 per month on Patreon and also manages to generate revenue through merchandise.

On the other hand, at the highest level in the UK, Definitely Human - which produced *MarsCorp* and *The Infinite Bad* and recently took on *The Monster Hunters*, makes \$960 per month. They're able to pay expenses, not wages. Both *Wooden Overcoats* and *Victoriocity* used Kickstarter to fund their second seasons, making £10,272 and £9,112 respectively - they plan to pay their teams minimum wage for recording, with heavy discounts on the producers' and writers' wages. *Wooden Overcoats'* second Kickstarter was somewhat more successful, raising £13,025 to make season 3 - however again this led to payments being more along the lines of minimum to living wage for their cast and crew.

The most financially viable independent drama podcast in the UK is *The Magnus Archives*, or specifically Rusty Quill - the company which makes the show. Rusty Quill makes \$4,363 per month on Patreon, which is a substantial amount of money in drama podcasting - though again

it seems to endeavour to pay its staff and team something more like living wage than a competitive industry standard. (In the case of Rusty Quill, it's important to note that this observation is speculation only, as such details are not publicly available.)

The biggest shows in the UK do to some extent compete with some of the biggest shows that have come out of the US - *Wolf 359* was making around \$3,807 per episode on Patreon before it ended, *The Penumbra Podcast* makes \$4,012 per month on Patreon, and *King Falls AM* also makes \$3,276 per month on Patreon. On a slightly smaller scale - there are a few drama podcasts which make around \$1,000 per month - *Girl in Space* makes \$1,101 per month on Patreon, *Archive 81* makes \$1,011 per month on Patreon - again in addition to revenue from merchandise and advertising.

On a smaller scale in the US, shows like *EOS10* make as little as \$546 per month on Patreon ('as little as' because *EOS10* is a culturally significant audio drama with a mid-sized ensemble cast) or collectives like the Whisperforge (*Ars Paradoxica*, *The Far Meridian*, *StarTripper!!*) make only \$799 per month on Patreon. Whilst websites like Patreon are rarely a drama podcast's only source of income, they often constitute the lion's share, and therefore are a reasonable basis from which to speculate on the average drama podcast budget.

With this in mind then, in the indie sector a drama podcast can be made from a little as no budget, to at most around \$4,000 per episode - and in the UK it's more like around £10,000 for a six to eight episode series. In the UK especially, however, this is only possible thanks to substantial informal discounts and free work, even when a podcast is otherwise managing to pay its creative team.

Night Vale Presents: The Exception to the Rule

Night Vale Presents has played its cards very close to its chest when it comes to disclosing budgets and profits. The facts as they stand are that *Welcome to Night Vale* has successfully run over 300 live shows in over 40 countries, and been downloaded over 170 million times across 135 episodes. Their live shows frequently sell out, as does their merchandise, and their novels are bestsellers. The network currently hosts 12 podcasts, of which seven are serialised drama in the traditional sense. All of this is reasonable grounds to assume that Night Vale Presents is making money - and they certainly pay their creatives industry standard rates.

This said, it's very difficult to know if they make or are able to pay much more than industry standard rates, and if so how much or how little. The only thing that it is possible to assume is that Night Vale Presents very much operates on a different scale to other indie podcast dramas, and much more likely works on a more similar level to that operated on by the other big networks.

Blue Sky Thinking: Big Budget Network Shows

There is no data the author can find to say exactly how much money has been spent on the big budget network shows like *Homecoming*, *Sandra*, *Bubble*, and *Wolverine: The Long Night*. Obviously the presence of celebrities like Richard Armitage, David Schwimmer, and Kristen

Wiig suggests a substantial amount of budget for the sake of hiring high profile talent, and photos available online of the studios used by the *Wolverine* team suggest access to a high professional standard of equipment, etc.

Many of these shows still ran adverts, and despite the fact that *The Message*, for example, by Panoply and GE Podcast Theater claimed an upfront 'multi-million dollar budget' - this doesn't seem to be the case for even the majority of network shows⁴.

This said, it does seem reasonable to assume that shows like *Homecoming*, *Sandra* and *Wolverine* were working with at least a several hundred thousand dollar budget in order to produce short, seven to twelve episode series.

It's difficult to know how much this paid off - or whether, as in the case of Gimlet, networks are investing these funds in order to try and use audio drama as an 'incubator' for potential films and TV programmes⁵.

In terms of a big budget, network drama, it seems reasonable to assume that industry standard wages would be expected - and for this reason a conservative estimated budget of \$10,000 - \$50,000 per episode is likely to be what they're working with, with a likely ceiling of around \$100,000 per episode for the biggest shows and talent.

⁴ <https://www.wired.com/2015/11/ge-podcast-funding/>

⁵ <https://www.fastcompany.com/40515497/gimlet-is-a-multimedia-storytelling-brand-not-just-a-podcast-network-says-new-cmo>

Top 10 Podcast Dramas

This is a brief summary of the 10 most successful drama podcasts of the last 10 years, as well as four shows which merited honourable mentions. Success is measured here by download numbers, social media presence, cultural impact and multimedia expansions, such as live events, novelisations or TV deals.

Because of the nature of the industry, accurate download figures are rarely publicly available and liable to change over time. Please take these figures as broad estimates.

The decision to factor in social media presence and multimedia expansion into a show's 'success' was taken for two reasons: popular awareness of the show is most easily measured on social media, and multimedia expansion suggests a level of confidence in the product and its marketability which support the download figures that have been found.

Finally, it's worth briefly mentioning that podcast drama to date has gone through three broad phases. The first started with the advent of podcasting on a major scale, which can roughly be dated to 2005 - when Apple first added podcasting to iTunes, and the first People's Choice Podcast Awards were held. The first phase of podcast drama specifically began in 2008, with *The Leviathan Chronicles* and lasted until 2014, when both *Serial* and *Welcome to Night Vale* got big worldwide. In this first phase *We're Alive* dominated.

In 2012, *Welcome to Night Vale* began. It was not an immediate success - instead it began to pick up popularity in 2013. In 2014, it rose to massive international success. From this point onwards, *Night Vale* dominates the drama podcast landscape.

From 2014 to 2016, a series of major shows began to tap into the rapidly growing audience for podcast dramas, and in 2015 in particular we saw a group of successful shows imitating the 'Serial' style, including: *The Black Tapes*, *Limetown*, *The Message* and *TANIS*.

The third phase of podcast drama began in 2016, and ran until 2018. In 2016, both Gimlet and the Night Vale Presents Network launched their own new dramas, *Homecoming* for Gimlet and *Alice Isn't Dead* and *Within the Wires* for Night Vale Presents. As we move into 2019, we're going into the fourth phase of podcast drama - and that has not yet been defined. However, the entrance of a number of major networks in 2018 (CBC, Stitcher, Maximum Fun) does point towards growing interest in the medium on a larger scale than has been seen before.

It's worth noting that there has not yet been a drama podcast launched since 2017 which has achieved success on the same level as those listed here, suggesting at present a minimum two-year time span for a podcast drama to reach a wide audience.

The List

1. Welcome to Night Vale
2. The Adventure Zone
3. We're Alive
4. The Black Tapes / TANIS
5. Hello From the Magic Tavern
6. Limetown
7. Alice Isn't Dead
8. The Bright Sessions
9. Wolf 359
10. The Message

Honourable mentions: Archive 81, King Falls AM, Ars Paradoxa, EOS 10

1. Welcome to Night Vale

Approx downloads: over 170 million⁶

Episodes: 135

Started: June 2012 (six years old)

Twitter: 357,000 followers

Facebook: 6,865 likes, 6,964 followers

Network: Night Vale Presents

Welcome to Night Vale is the single most successful fiction podcast in the world. It's been going since June 2012, and has released 135 episodes at time of writing. It has had more than 170 million downloads.

The story follows the fictional town of Night Vale, a place where all conspiracy theories are true. Its protagonist is community radio host Cecil Baldwin, a gay Jewish man who frequently discusses his personal life on the air. *Night Vale* always features a musical segment, "The Weather", and *Night Vale* episodes are typically 20 to 30 minutes long.

Night Vale has also made a significant name for itself touring a live version of the podcast. The Night Vale Presents network, which was formed out of the show's initial success, has produced over 300 live events in 35 US states and 16 countries. Their 2018/19 World Tour is visiting 44 cities with 47 performances in nine countries. The show has been performed at the London Palladium, Edinburgh Fringe Festival, San Diego Comic Con and the Sydney Opera House. It frequently sells out.

There are two novels set within the universe of *Welcome to Night Vale*: *Welcome to Night Vale* and *It Devours*. The creators of *Night Vale* have also published two script compilations of the show's first two seasons, *The Great Glowing Coils of the Universe* and *Mostly Void, Partially*

⁶ [Hudson Valley Online claims as many as 180 million downloads](#); [Vox.com states the show was averaging eight and a half million downloads per month](#); [Jeffrey Cranor and Joseph Fink claim they've had over 170 million downloads](#)

Stars. These compilations include commentary from the show's writers, actors and composer. There has been repeated news of a Night Vale TV show, though nothing has yet come of these announcements.

**Note on downloads: Night Vale's creators have publicly stated that the show has had over 170 million downloads.*

2. The Adventure Zone

Approx downloads: est.100 million⁷

Episodes: 103

Started: August 2014 (four years old)

Twitter: 141,000 followers

Facebook: 39,376 likes, 40,112 followers

Network: Maximum Fun

The Adventure Zone is an 'actual play' podcast, in which three brothers and their father play Dungeons and Dragons. The show is written and presented by the McElroys, who are themselves podcasting giants. Justin, Travis, and Griffin McElroy present a number of highly successful podcasts, including: *My Brother, My Brother and Me*; *Shmanners* and *Sawbones*.

The first arc of *The Adventure Zone*, referred to in show and by its fans as the 'Balance' Arc, follows a group of three adventurers who find themselves employed by the enigmatic Bureau of Balance, a secret organisation dedicated to saving the world from destruction.

The Adventure Zone has run nine large scale live shows, many of which have sold out. So far, they've exclusively done live shows in the USA. It's expected that they'll continue to run live shows based on the first narrative arc of the show (the aforementioned Balance Arc), which covers the first 69 episodes.

They also published a graphic novel adaptation of the podcast in July 2018. It has hit number 1 on the Amazon literary graphic novel bestseller list and on the New York Times' Trade Fiction bestseller list.

**Note on downloads: Whilst the McElroys have not publicly stated their total downloads, they claim the show receives on average 2 million downloads a week - and as many as 300,000 downloads per episode.*

3. We're Alive

Approx downloads: over 100 million⁸

⁷ [The McElroys have advertised the show with the claim they get as many as 300,000 downloads per episode, and in the Daily Dot it was claimed they had two million downloads per week.](#)

Episodes: 143

Started: May 2009 (nine years old)

Finished: July 2014

Twitter: 10,900 followers

Facebook: 42,396 likes, 41,461 followers

Network: No affiliation

We're Alive is an ensemble drama set in the zombie apocalypse. It was the first major successful podcast drama, pre-dating *Night Vale* by three years, and *Serial* by five years.

We're Alive follows a soldier called Michael Cross over the course of four seasons as he leads a group of survivors in a zombie apocalypse. Very much in the style of shows and comics like *The Walking Dead*, *We're Alive* is a gritty action thriller in which its characters are repeatedly asked to make difficult choices and survive impossible situations.

We're Alive has only done one live show, which was their season finale in 2011 - they chose to live stream it. The video on Youtube has been watched 51,336 times. The *We're Alive* YouTube channel boasts 4,658 subscribers. A compilation of the show has since been released on the Nerdist Podcast Network. There's also a televisual adaptation being streamed by Geek and Sundry, based on the show. KC Wayland, one of the show's creators, continues to be active in the drama podcast scene.

**Note on downloads: We're Alive's creators announced this year that they'd reached 100 million downloads.*

4. The Black Tapes / TANIS

Approx downloads: Over 40 million⁹

Episodes: 30 (Black Tapes) / 48 (TANIS)

Started: May 2015 (three years old, Black Tapes and finished November 2017) / October 2015 (three years old, TANIS)

Twitter: 28,400 followers (Black Tapes) / 14,500 (TANIS)

Facebook: 29,837 likes, 29,992 followers (Black Tapes) / 14,375 likes, 14,520 followers (TANIS)

Network: No affiliation*

The Black Tapes and *TANIS* are two different drama podcasts set within the same fictional universe, which also includes the drama podcast *RABBITS*. Set very much in the style of true crime podcasts like *Serial*, and following not long after *Serial's* success, they quickly evolve from pseudo-documentaries into supernatural thrillers.

⁸ [The show announced that they hit 80 million downloads this year](#)

⁹ [It was recently announced that The Black Tapes has had over 40 million downloads](#)

The Black Tapes follows intrepid journalist Alex Reagan, a woman who decides to pursue the infamous cynic Richard Strand. Strand has offered a substantial financial reward to anyone who can conclusively prove the existence of the supernatural - though he has debunked every piece of 'evidence' he's ever received. The plot thickens when Alex discovers that Strand has a catalogue of unsolved cases - the eponymous 'Black Tapes'.

TANIS extends the universe, following Alex's fictional producer Nic Silver, who himself becomes embroiled in a far-reaching supernatural conspiracy when he becomes obsessed with *TANIS*. Allegedly impossible to quantify, *TANIS* is a god, a lost city, an alternate dimension or the key to all knowledge - and a virtual breadcrumb trail giving clues to its actual nature is left across encrypted forums on the dark web. Nic enlists the help of a hacker, who goes by the name Meerkatnip, and puts himself into increasingly dangerous situations in his quest for the truth.

Neither *The Black Tapes* nor *TANIS* have done a live show, and *The Black Tapes* is now finished. However, Paul Bae and Terry Miles are still considered to be giants in the field of podcast drama, and their stylistic influence is far-reaching. *TANIS* has been optioned for TV - it's being produced by Sam Raimi for Syfy. *The Black Tapes* is now in development with NBC under Bae, Miles and Matthew Arnold.

**The Pacific Northwest Stories group referred to by the show creators in interviews is fictional*

5. Hello From The Magic Tavern

Approx downloads: est 10 million

Episodes: 182

Started: March 2015 (three years old)

Twitter: 27,200

Facebook: 17,502 likes, 17,644 followers

Network: No affiliation

Hello from the Magic Tavern is an improvisational comedy with a loose structure, fictional world, lore and recurring characters to which both the show's core cast and guests occasionally refer.

Whilst not strictly a drama podcast in the sense of being scripted or having a critically structured narrative arc in the traditional sense, *Hello from the Magic Tavern* is enormously popular with fans of drama podcasts. Its popularity with drama podcast creators also means that it has significant influence on the medium. Finally, whilst often absurd and contrary, the show does loosely have a fictional world, lore and even recurring characters to which it refers - and in this sense many fans think of it as a piece of ongoing fiction with which they can engage.

The show follows Arnie - a human from Chicago, played by Arnie Niekamp. Arnie fell through a portal and found himself in the mystical land of Foon. Thanks to the fact that he still gets a weak wi-fi signal from the Burger King on the other side of the rift, he's decided to host a weekly

podcast from an inn called The Vermillion Minotaur. Arnie interviews the inn's patrons and other travellers and misfits - usually played by the show's guests.

Hello From The Magic Tavern has done 20 live shows across a range of venues in both the UK and the US, though the majority of its live shows have been performed and recorded in the US. In rude health, the podcast is scheduled to do several more live shows in 2018, and it's likely that it will continue to hold such events.

**Note on downloads: Whilst figures aren't available for the show's downloads its social media following, live show success, number of episodes and lifespan in comparison to other similar podcasts suggest that the figure would be somewhere in the region of 10 million.*

6. Limetown

Approx downloads: over 9 million¹⁰

Episodes: 6

Started: July 2015 (three years old)

Twitter: 27,200

Facebook: 17,502 likes, 17,644 followers

Network: No affiliation

Limetown is one of podcast drama's most famous overnight success stories. The first podcast drama to imitate the true crime style of *Serial*, it surfed the wave of the podcasting boom that *Serial* helped to create. Much like *The Black Tapes* which came just before it, *Limetown* twists its pseudo-documentary style into a supernatural thriller. Once considered to be over for good, (despite creator announcements to the contrary), *Limetown* recently came back for a second season.

Limetown follows the story of Lia Haddock, an intrepid journalist determined to get to the bottom of the story of the town after which the show is named. The show's premise holds that ten years ago, every resident of Limetown disappeared over the course of 48 hours - and no one knows what happened to them. As the show goes on, listeners learn that Lia has a personal connection to the story - her uncle is one of the missing people.

Limetown in particular experiments with the flexibility that podcasting allows in terms of episode length, dropping very short episode 'announcements' from Lia's fictitious employer to build on the show's fiction. When it was released, *Limetown* soared to the top of the US iTunes charts, outpacing even *This American Life* (health warnings around charts and their reliability must always be borne in mind). The show has now produced a prequel novel, which will be released later this year (2018).

**Note on downloads: it's been claimed that the show has have over 9 million downloads.*

¹⁰ [According to Nieman Lab, Limetown has had more than nine million downloads](#)

7. Alice Isn't Dead

Approx downloads: over 6 million¹¹

Episodes: 40

Started: March 2016 (two years old)

Finished: August 2018

Twitter: 9,953

Facebook: 12,728 likes, 12,941 followers

Network: Night Vale Presents

The second most successful show on the Night Vale Presents network after *Welcome to Night Vale*, *Alice Isn't Dead* was a cult hit with a portion of its listener base - however it was not able to imitate Night Vale's runaway success.

Alice follows a long distance trucker: a black lesbian woman with clinical anxiety called Keisha, who's searching for her wife Alice. Keisha, who had previously believed Alice to be dead, is shocked one day to see her lost loved one on the news in the background of some news footage. She leaves her old life behind and sets out on the open road, facing various supernatural dangers on her way, and sending diary-esque messages through her transmitter addressed to Alice, ostensibly in the hopes that she'll hear them.

Now finished, *Alice Isn't Dead* has done two live shows. There is also an *Alice Isn't Dead* novel, an adaptation of the podcast released on 30 October 2018. *Alice Isn't Dead* is one of several drama podcasts offered a TV adaptation, though there has been no news of note on the subject since this announcement.

**Note on downloads: Night Vale Presents advertise the Alice Isn't Dead novel with the headline that the podcast has had over 6 million downloads.*

8. The Bright Sessions

Approx downloads: over 6 million¹²

Episodes: 56

Started: November 2015 (three years)

Finished: June 2018

Twitter: 12,600

Facebook: 5,045 likes, 5,111 followers

Network: No affiliation

The Bright Sessions is arguably one of the most influential contemporary drama podcasts - in terms of its impact on the international audio drama community, and the success of its creator

¹¹ [The Alice Isn't Dead novel is advertised with the claim that the show had over six million downloads in its first season](#)

¹² [Forbes magazine stated that The Bright Sessions had had six million downloads earlier this year](#)

Lauren Shippen (named one of Forbes magazine's 30 under 30 for 2018 as a direct result of her work on the show.)

The story is a supernatural drama about a psychological therapist called Dr Bright who provides treatment for so-called 'atypicals' - humans with supernatural abilities. In the first episode, for example, a woman called Samantha with clinical anxiety time travels when she has a panic attack. The show's plot escalates as listeners begin to realise that Dr Bright is not as well-meaning as she might seem, and that the atypicals themselves might be in danger.

Over the course of four seasons in three years, *The Bright Sessions* rocketed to international success. Lauren Shippen is repeatedly invited to speak at conferences and conventions about audio drama, and recently announced a collaboration with John Dryden and Mara Wilson starring Kelly Marie Tran and Colin Morgan for Panoply called *Passenger List*. Following the collapse of Panoply's original content arm, it's unclear what will happen to the show - and it's not yet been announced when this new drama will be released. Like *Night Vale*, there have been repeated announcements of a *Bright Sessions* TV show, though nothing has yet come of these. Lauren Shippen is also writing a trilogy of young adult novels based on the show for Tor Books, the first of which is scheduled for release in summer 2019.

**Notes on downloads: The Bright Sessions had at least 6 million downloads at the start of this year.*

9. Wolf 359

Approx downloads: over 6 million¹³

Episodes: 61

Started: August 2014 (four years old)

Finished: December 2017

Twitter: 7,563

Facebook: 3,015 likes, 3,048 followers

Network: No affiliation

Wolf 359 is the closest sibling to *The Bright Sessions* on this list in terms of tone, style, audience, time scale and level of success.

Created by Gabriel Urbina, *Wolf 359* follows the misadventures of a hapless skeleton crew on board the SS Hephaestus, orbiting the red dwarf Wolf 359. The show's protagonist is the station's communications officer, Doug Eiffel. What starts out as a fairly light hearted comedy (it's difficult not to draw comparisons to the TV show *Red Dwarf*), after the first dozen episodes *Wolf 359* quickly escalates into a high stakes adventure, sometimes slipping back into comedy, sometimes moving further into thriller territory and science fiction.

¹³ [Geek Girl Authority says Wolf 359 has had over three million downloads](#), [Discover Pods says the show has had over six million](#)

Like *The Bright Sessions*, *Wolf 359* has now concluded - and like *The Bright Sessions* and many other items on this list, a novel connected to the show has been promised. However, this one is auxiliary content to the show, rather than a novelisation, and was crowdfunded by the show's fans. Gabriel Urbina, the show's creator, has yet to announce his next major project. *Wolf 359* did one large scale live show before its conclusion.

**Notes on downloads: Wolf 359 has more than 6 million downloads.*

10. The Message

Approx downloads: 5 million¹⁴

Episodes: 8

Started: October 2015 (three years old)

Finished: November 2015

Twitter: N/A

Facebook: N/A

Network: Panoply

The Message is one of the very few network shows that made it onto this list. Its writer, Mac Rogers, has written two more short drama serials since then - *LifeAfter* and *Steal the Stars*. *The Message* does not have its own social media presence.

The story follows an intrepid young female journalist who has managed to get an internship at a well-respected think tank. The think tank in question is quickly commissioned to decipher a strange message picked up by the US military on a base in Alaska at the turn of the 20th century. As the show progresses, it flips the 'intrepid female journalist' trope on its head, and becomes one of the first drama podcasts to take full advantage of the notion that the act of listening has dramatic consequences. (*The Black Tapes* and *Archive 81* are the other notable examples of this.)

The Message never did a live show, and there has been no news of any multimedia adaptations. Its afterlife - to the extent that you can call it that, can mostly be charted through the career of Mac Rogers, whose most recent drama *Steal the Stars* was released in conjunction with a novelisation of the same story by Tor Books, a US based publisher specialising in science fiction.

**Notes on downloads: The Message has had at least 5 million downloads.*

¹⁴ [The Observer reported in 2016 that The Message had had nearly five million downloads - it's reasonable to assume this number has grown somewhat since then](#)

Honourable Mentions

King Falls AM

Approx downloads: over 9 million¹⁵

Episodes: 75

Started: May 2015 (three years old)

Twitter: 5,493

Facebook: 3,832 likes, 3,873 following

Network: No affiliation

Set up as a late night AM radio show in a small American mountain town, *King Falls* is a sometimes comedic, sometimes action packed drama which kicks off in episode one with a call-in guest being abducted by aliens live on air. *King Falls AM* is notable because it has fairly little contact with other major drama podcasts, and has cultivated a fanbase outside of them.

Despite it's very high number of downloads, *King Falls* has not been included in the top 10 because of the other factors taken into consideration when creating this list - it is a very significant show, hence the honourable mention, however it has also become significant much more recently than the rest, and we have yet to see what legacy it will leave.

**Notes on downloads: King Falls AM announced on Twitter they'd had over 9 million downloads*

Archive 81

Approx downloads: est 2 million¹⁶

Episodes: 31

Started: April 2016 (two years old)

Twitter: 5,376

Facebook: 3,201 likes, 3,237 following

Network: No affiliation

Archive 81 has released three series to date, as well as a two-part special and a Patreon exclusive bonus series. It's an eldritch tale which starts innocuously enough with an archivist responsible for digitising the cassette tapes of a building survey in New York. Located somewhere between horror, fantasy and science fiction, the show is very well regarded as a critically beautiful piece of sonic storytelling.

¹⁵ [On 12 December 2018 King Falls AM announced on Twitter that they'd surpassed 9 million downloads](#), a growth of 7 million in just one year since their last announcement of 2.5 million in 2017

¹⁶ [Archive 81's creators announced that they crossed one million downloads in 2016](#) - considering that the show has released two seasons since then, and began in April 2016, it's likely that this number has increased substantially

**Notes on downloads: Archive 81 broke 1 million downloads in its first year, if anything 2 million is a conservative estimate.*

Ars Paradoxica

Approx downloads: over 1 million¹⁷

Episodes: 36

Started: June 2015 (three years old)

Twitter: 4,849

Facebook: 2,161 likes, 2,193 following

Network: Whisperforge

A historical science fiction drama, *Ars Paradoxica* follows Dr Sally Grissom - a woman who accidentally invents time travel and winds up stuck in America in the 1940s. As the show progresses, Sally realises that her invention has created a political mess far bigger than the war. This show is very much the flagship of the Whisperforge network, a small independent collective.

**Notes on downloads: Ars Paradoxica has had at least 1 million downloads*

EOS 10

Approx downloads: est 1 million

Episodes: 26

Started: October 2014 (four years old)

Twitter: 3,150

Facebook: 2,232 likes, 2,267 following

Network: No affiliation

EOS 10 recently returned from a protracted hiatus - years after fans thought the show was finished for good. It's a science fiction comedy and a medical drama which is set on a space station, and follows a young doctor given the unenviable task of helping the curmudgeonly Dr Urvidian get sober. It's something of a cult hit with drama podcast creators.

**Notes on downloads: it's reasonable to assume EOS 10 has had at least a million downloads based on the success of its social media presence and life span.*

¹⁷ [Ars Paradoxica announced that they hit one million downloads earlier this year](#)

End Note: Other Indie ‘Household’ Names

There are a few other drama podcasts that have become household names among drama podcast creators and their fans. These include but are not limited to: *The Thrilling Adventure Hour*, *Our Fair City*, *36 Questions*, *Greater Boston*, *Marscorp*, *The Infinite Bad*, *The Far Meridian*, *Small Town Horror*, *Uncanny County*, *Wooden Overcoats*, *Girl in Space*, *Marsfall*, *The Penumbra Podcast*, *The Amelia Project*, *Alba Salix*, *What’s The Frequency*, *Mabel*, *2298*, *Spines*, *Steal the Stars*, *Within the Wires* and *Sayer*.

Genre

This is a broad overview of which genres extant drama podcasts fall into, and a brief look at trends in those genres over time. Two things need to be noted: the first is that due to the nature of the medium and popular trends, often drama podcasts cannot be restricted to one genre. For the sake of the graph given below, podcasts have only been given one major genre, but it's worth noting that many fit into multiple categories (both fantasy and science fiction, for example). Second, because of how rapidly the industry changes, this cannot be a definitive overview. Please take it as a snapshot of drama podcasts at time of writing.

Most Popular Genres

Science fiction is the most popular genre for drama podcasts by far. Of the 181 podcasts surveyed for the sake of this map, 81 fall into the *science fiction* category (nine of which have been classed as *science fiction comedy*). This is 44% of all dramas surveyed. The second largest category, *fantasy*, has only 43 podcasts (of which 10 are fantasy comedy and five are urban fantasy) - which is 23% of all podcasts surveyed, roughly half of *science fiction*.

However, in 2018 there was a drop in new *science fiction* podcasts being released, and a rise in *fantasy*. It might be extrapolated from this that the perceived lack of *fantasy* podcasts drove creators to try and monopolise the space, and the perceived saturation of *science fiction* drove new minds away from the genre. It's important to note that even with this drop and rise respectively, five more *science fiction* podcasts were released this year than *fantasy*.

After *science fiction* and *fantasy*, *horror* is the third most popular genre for drama podcasts. *Horror* appears to have peaked in 2016, and it seems reasonable to assume that this was partly a result of the dramatic success of *The Black Tapes* and *TANIS*, both *horror* podcasts, and some of the most successful drama podcasts in the world. However, after 2016, new *horror* seemed to drop off, and it has apparently broadly plateaued since 2017. It will be interesting to see whether this trend continues, or if *horror* becomes more or less popular as we move into 2019.

Fourth in terms of most popular genres for drama podcasts is *mystery* - and this genre is more popular if we include specifically *crime fiction* in its category. It's worth noting that in terms of scale, this is a very different level to *science fiction* - to date there have only been eight *mystery* focused dramas and four *crime* dramas since 2008. This is a fraction of the total extant *science fiction* podcasts, and *mystery* and *crime* continue to be relatively unexplored - and unsuccessful - territories for drama podcasts.

Fifth is *comedy* - though it's fourth or even third if genre comedy podcasts are included in this assessment. Whilst there have been only five *comedy* focused drama podcasts since 2008, there have been four *horror comedies*, 10 *fantasy comedies* and nine *science fiction comedies* - bringing the total up to 28 podcasts in all. This is more than double the number of *mystery* and *crime* podcasts, so there is a demonstrable appetite for *comedy* among drama podcast

listeners. Straight, scripted *comedy* however continues to be a relatively untapped space - perhaps because of the enormous presence held by broadcast competitors like BBC Radio 4.

Smaller Genres and Sub-Genres

There are several popular sub-genres of drama podcast, which are successful enough to merit their own category. Generally speaking, hybridised and unusual genre is a hallmark of drama podcasts, and they rarely fit into one conventional categorisation.

Of these the biggest sub-genre is *science fiction comedy* - likely skewed by the overwhelming popularity of *science fiction* in drama podcasts. There are 10 *science fiction comedies* that have been made and released since 2008. After this, there are nine *fantasy comedies*, and four *horror comedies*. A particular brand of *horror comedy* seems deeply attached to the nature and current landscape of drama podcasting - this is a brand flirted with by *Welcome to Night Vale* and *The Thrilling Adventure Hour*, and a genre which has yet to truly find its feet.

Within *fantasy*, there's an increasing appetite for very specific sub-genres from drama podcasts. In particular, *urban fantasy* is a popular genre - with five podcasts already extant in the space (including the hit *Alice Isn't Dead*), as is *magical realism* - podcasts which move into and out of actual fantasy (the largest of these from the US is *Greater Boston* and from the UK is *A Scottish Podcast*).

After these sub-genres, even smaller genres in terms of their popularity with drama podcasts are *romance* - which now boasts three offerings (*Love and Luck*, *The Shadows* and *Kaleidotrope*); *historical fiction* - with only two podcasts from 2017 (*Deadly Manners* and *Bronzeville*); *musical podcasts* - both the *Fall of the House of Sunshine* and *36 Questions* are full musical productions, and *theatrical adaptations* (of which there are three independent adaptations of note: *Duggan Hill*, *Rathband* and *Four Mondays*.)

There has only been one major straight drama, *Homecoming*, however due to its themes it might as easily be classed a *thriller* or even *mystery* podcast.

Thoughts and Speculation

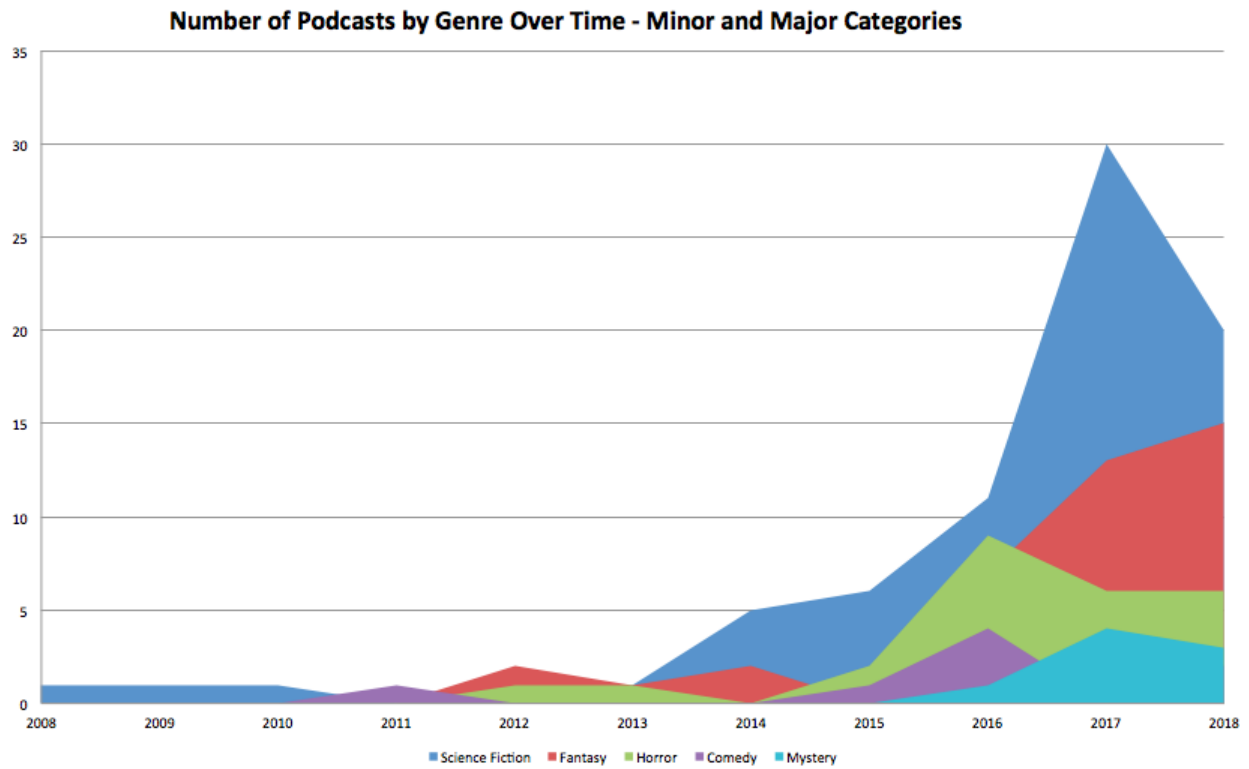
Whilst *science fiction* is a saturated market, it's worth being aware of the long tradition it has in the drama podcast industry. *Fantasy* is likely to be saturated very soon, and *horror* seems to be less popular now than it was in 2016. *Comedy*, *romance*, *drama*, and even *crime* and *mystery* fiction continue to be relatively untapped markets.

This said, it seems like the most fertile and drama podcast relevant areas are the hybrid and sub-genres, like *horror comedy*, *historical fiction* and *urban fantasy*. It's in these genre defying spaces that there is room to not only dominate but define a corner of the creative space, and this seems like the most interesting option.

Note on Graphs

The graph below illustrates how many new podcasts were released in a given genre for a given year. 'Major and minor' genres refers to things like science fiction comedy - which were largely organised into the science fiction bracket as appropriate.

Finally, please note that since this graph ends in 2018, the final data points are only 4/5ths of what they might be by the end of this year.



GENRE	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Science Fiction	1	1	1	0	0	1	5	6	11	30	20
Fantasy	0	0	0	0	2	1	2	0	7	13	15
Horror	0	0	0	0	1	1	0	2	9	6	6
Comedy	0	0	0	1	0	0	0	1	4	0	2
Mystery	0	0	0	0	0	0	0	0	1	4	3