THE PODCAST CONSUMER 2016

Tom Webster
VP Strategy and Marketing, Edison Research
(and podcaster)

Twitter: @webby2001
#PodCon16
Study Methodology

• In January/February 2016, Edison Research conducted a national telephone survey of 2001 people aged 12 and older, using random digit dialing techniques
• Interviews were 52% landline and 48% cell phone
• Survey offered in both English and Spanish languages
• Data weighted to national 12+ population figures
• This series has been covering a wide range of digital media topics since 1998.
Awareness of the Term “Podcasting”

Total Population 12+

% familiar with the term “Podcasting”

- 22% in 2006
- 37% in 2007
- 37% in 2008
- 43% in 2009
- 45% in 2010
- 45% in 2011
- 46% in 2012
- 46% in 2013
- 48% in 2014
- 49% in 2015
- 55% in 2016

Estimated 150 Million
Podcast Listening

Total Population 12+

% ever listening to a podcast

2006: 11%
2007: 13%
2008: 18%
2009: 22%
2010: 23%
2011: 25%
2012: 29%
2013: 27%
2014: 30%
2015: 33%
2016: 36%

Estimated 98 Million
The Infinite Dial

Monthly Podcast Listening

Total Population 12+

<table>
<thead>
<tr>
<th>Year</th>
<th>% Listening</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>9%</td>
</tr>
<tr>
<td>2009</td>
<td>11%</td>
</tr>
<tr>
<td>2010</td>
<td>12%</td>
</tr>
<tr>
<td>2011</td>
<td>12%</td>
</tr>
<tr>
<td>2012</td>
<td>14%</td>
</tr>
<tr>
<td>2013</td>
<td>12%</td>
</tr>
<tr>
<td>2014</td>
<td>15%</td>
</tr>
<tr>
<td>2015</td>
<td>17%</td>
</tr>
<tr>
<td>2016</td>
<td>21%</td>
</tr>
</tbody>
</table>

Estimated 57 Million
Monthly Podcast Listening

% listening to a podcast in last month

Monthly Podcast Listening

**Men**
- 2013: 15%
- 2014: 17%
- 2015: 17%
- 2016: 24%

**Women**
- 2013: 9%
- 2014: 13%
- 2015: 16%
- 2016: 18%

% listening to a podcast in last month
Who Listens to Podcasts?

Base: Listened to a podcast in last month (Podcast Consumers)

- Men: 56%
- Women: 44%
Who Listens to Podcasts?

U.S. Population 12+

- Age 18-34: 28%
- Age 12-17: 9%
- Age 35-54: 31%
- Age 55 and older: 32%

Podcast Consumers 12+

- Age 18-34: 38%
- Age 12-17: 11%
- Age 35-54: 34%
- Age 55 and older: 17%
Podcast Consumers are Affluent

Annual Household Income:

U.S. Population 18+
- Median: $53,000

Podcast Consumers 18+
- Median: $63,000

- 33% $150K or more
- 12% $100K-$150K
- 12% $75K-$100K
- 9% $75K or less
Podcast Consumers are Highly Educated

- **High School or less**: U.S. Population 18+ - 30%, Podcast Consumers 18+ - 22%
- **One to three years of college**: U.S. Population 18+ - 30%, Podcast Consumers 18+ - 27%
- **Four-year college degree**: U.S. Population 18+ - 20%, Podcast Consumers 18+ - 22%
- **Some grad school or advanced degree**: U.S. Population 18+ - 21%, Podcast Consumers 18+ - 29%
Weekly Podcast Listening

Total Population 12+

% listening to a podcast in last week

- 2013: 7%
- 2014: 8%
- 2015: 10%
- 2016: 13%

Estimated 35 Million
Average Time “Weekly Podcast Listeners” Spend Listening to Podcasts

Base: Weekly Podcast Listeners

Mean: 4 hours 10 minutes

- Less than one hour: 10%
- 1 hour to less than 3 hours: 40%
- 3 hours to less than 5 hours: 19%
- 5 hours to less than 10 hours: 17%
- 10 hours or more: 12%
- Don’t Know: 2%
Number of Podcasts Listened to in the Last Week

Base: Weekly Podcast Listeners

- One: 17%
- Two: 19%
- Three: 22%
- Four or Five: 21%
- Six to Ten: 13%
- 11 or more: 8%

Average of five podcasts listened per week.
Device Used Most Often to Listen to Podcasts

Podcast Consumers 12+

<table>
<thead>
<tr>
<th>Year</th>
<th>Computer</th>
<th>Smartphone/tablet/portable device</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>2014</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>2015</td>
<td>36%</td>
<td>64%</td>
</tr>
<tr>
<td>2016</td>
<td>29%</td>
<td>71%</td>
</tr>
</tbody>
</table>
Years Listening to Podcasts

“For how long have you been listening to podcasts?”

Ever listened to a podcast
- 5 yrs or more: 17%
- 3 yrs to < than 5 yrs: 13%
- 1 yr to < than 3 yrs: 32%
- 6 months to < than 1 yr: 18%
- Less than 6 months: 20%

Monthly Podcast Consumers
- 5 yrs or more: 21%
- 3 yrs to < than 5 yrs: 14%
- 1 yr to < than 3 yrs: 32%
- 6 months to < than 1 yr: 16%
- Less than 6 months: 17%

Weekly Podcast Consumers
- 5 yrs or more: 25%
- 3 yrs to < than 5 yrs: 16%
- 1 yr to < than 3 yrs: 32%
- 6 months to < than 1 yr: 14%
- Less than 6 months: 13%
Where are Podcasts Most Often Listened to?

"Where do you listen most often to podcasts?"

Podcast Consumers 12+

- At home: 53%
- At work: 14%
- In a car/truck: 21%
- While riding public transportation: 4%
- Other: 8%
Method of Listening to Podcasts

Podcast Consumers 12+

- Click on podcast and listen immediately: 79%
- Download podcast manually and listen later: 49%
- Subscribe to podcast and download automatically to listen later: 36%

% ever using method to listen to a podcast
Method Used Most Often to Listen to Podcasts

Podcast Consumers 12+

- Click and listen immediately: 59%
- Download manually to listen later: 23%
- Subscribe to and download automatically to listen later: 15%
- Don't Know: 3%
Time Between Downloading Last Podcast and Listening to It

“When did you listen to the last podcast you downloaded and listened to at a later time?”

Base: Podcast consumers 12+ who have downloaded podcasts to listen at a later time

- Within 24 hours of downloading it: 55%
- Within 48 hours of downloading it: 18%
- Within a week of downloading it: 16%
- Longer than a week after downloading it: 8%
- Don't Know: 3%
<table>
<thead>
<tr>
<th>Social Media Brand</th>
<th>U.S. Population 12+</th>
<th>Podcast Consumers 12+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Social Media Brand</td>
<td>78%</td>
<td>93%</td>
</tr>
<tr>
<td>Facebook</td>
<td>64%</td>
<td>76%</td>
</tr>
<tr>
<td>Instagram</td>
<td>29%</td>
<td>41%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>25%</td>
<td>30%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>23%</td>
<td>32%</td>
</tr>
<tr>
<td>Twitter</td>
<td>21%</td>
<td>36%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>20%</td>
<td>33%</td>
</tr>
<tr>
<td>Google+</td>
<td>15%</td>
<td>24%</td>
</tr>
</tbody>
</table>
Frequency of Social Media Usage

“At how often do you use any social networking site or service?”

U.S. Population 12+

- At least "several times a day" 43%
- Less often than "several times a day" 57%

Podcast Consumers 12+

- At least "several times a day" 60%
- Less often than "several times a day" 40%
Follow Companies/Brands on Social Media

“Do you follow any companies or brands on any social networking sites, such as Facebook or Twitter?”

U.S. Population 12+
- Yes: 28%
- No: 72%

Podcast Consumers 12+
- Yes: 47%
- No: 53%
Type of Smartphone Owned

Podcast Consumers 12+

<table>
<thead>
<tr>
<th>Type of Smartphone Owned</th>
<th>% owning type of phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>iPhone</td>
<td>49%</td>
</tr>
<tr>
<td>Android</td>
<td>41%</td>
</tr>
<tr>
<td>Other smartphone</td>
<td>13%</td>
</tr>
</tbody>
</table>
Number of Podcasts Listened to in Last Week by Smartphone Type

Base: Weekly Podcast Listeners

<table>
<thead>
<tr>
<th></th>
<th>1 to 2</th>
<th>3 to 5</th>
<th>6 to 10</th>
<th>11 or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>iPhone Owners</td>
<td>34%</td>
<td>47%</td>
<td>13%</td>
<td>6%</td>
</tr>
<tr>
<td>Android Owners</td>
<td>37%</td>
<td>40%</td>
<td>11%</td>
<td>12%</td>
</tr>
</tbody>
</table>

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On-Demand Video Service Subscription

Podcast Consumers 12+

- Netflix: 57%
- Amazon Prime: 34%
- Hulu: 18%
- Subscription to any of the above: 70%

% having a subscription
Used On-Demand Video Service in Last Week

Podcast Consumers 12+

- Netflix: 47%
- Amazon Prime Instant Video: 17%
- Hulu: 11%
- Used any of the above in the last week: 55%

% subscribing and using service in last week
Listening to Online Radio in Last Week

**U.S. Population 12+**

- **Listen to Online Radio in last week**: 50%
- **Did not listen to Online Radio in last week**: 50%

**Podcast Consumers 12+**

- **Listen to Online Radio in last week**: 75%
- **Did not listen to Online Radio in last week**: 25%

Online Radio = Listening to AM/FM radio stations online and/or listening to streamed audio content available only on the Internet
Share of Ear Survey Methodology

- 8,631 respondents
  - Completed 24-hour audio listening diary
- National sample 13+
- Online and offline
- Offered in English and Spanish
- Quarterly data collection and updates
  - Data is reported as the past four reports rolled
Share of Ear

**AUDIO**
- AM/FM Radio
- Owned Music
- Streaming Audio
- SiriusXM
- Music Channels on TV
- Podcasts

**LOCATION**
- Home
- Work
- Car/Truck
- Somewhere else

**CONTENT**
- Music
- News
- Talk/Personalities
- Sports

**DEVICE**
- AM/FM Radio
- Computer
- Mobile Device
- TV Audio Channels
- SiriusXM Receiver
- Internet-connected TV device
- Wireless streaming speakers
Share of Ear

~8,000 one-day audio diaries completed in 2015
Share of Ear

On average, people spend **4 hours** listening to audio
Americans’ Share of Time Spent Listening to Audio Sources

- AM/FM Radio: 54%
- Owned Music (CDs, Digital music files, etc.): 16%
- Streaming Audio: 15%
- SiriusXM: 7%
- TV Music Channels: 5%
- Podcasts: 2%
- Other: 1%

Source: Edison Research. Americans spend an average of 3 hours and 58 minutes each day consuming audio. This graph represents the share of time spent with each. Based on a nationally representative sample of 8,535 Americans ages 13+ who completed a 24-hour audio listening diary. For more information contact info@edisonresearch.com
Podcast Listeners spend an average of 5 hours and 50 minutes each day consuming audio. This graph represents the share of time Podcast Listeners spent with each audio source. Based on a nationally representative sample of 8,535 Americans ages 13+ who completed a 24-hour audio listening diary. For more information contact info@edisonresearch.com.
Share of Ear®
Audio Listening by Device

- AM/FM Radio Receiver: 50%
- Smartphone: 20%
- Computer: 12%
- SiriusXM Receiver: 6%
- TV Audio Channels (e.g. Music Choice): 5%
- CD Player: 4%
- Internet Connected TV/Device: 1%
- Other: 2%
Share of Ear®
Audio Listening by Device

Smartphone
20%
34% listened to audio on a smartphone in a day
Share of Ear®
Americans’ Share of Time Spent Listening to Audio Sources on a Smartphone

Owned Music 43%

Streaming Audio 38%

AM/FM Radio 8%

Podcast 7%

Other 4%
Americans’ Share of Time Spent Listening to Audio Sources on a Smartphone

- **Streaming Audio**: 42%
- **Owned Music**: 42%
- **AM/FM Radio**: 5%
- **Podcasts**: 8%
- **Other**: 3%
A few thoughts.
Reach vs. Reachability.
Consumer Behavior is driving better metrics
Podcasts don’t “sit around.”
What is a “Podcast?”
Political Identification

Base: Age 18+ and gave an answer

<table>
<thead>
<tr>
<th></th>
<th>Democrat</th>
<th>Independent</th>
<th>Republican</th>
<th>Something Else</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. Population 18+</td>
<td>32%</td>
<td>24%</td>
<td>27%</td>
<td>17%</td>
</tr>
<tr>
<td>Podcast Consumers 18+</td>
<td>32%</td>
<td>26%</td>
<td>24%</td>
<td>18%</td>
</tr>
</tbody>
</table>