THE PODCAST CONSUMER 2017

#PodCon17
Study Methodology

- In January/February 2017, Edison Research conducted a national telephone survey of 2000 people aged 12 and older, using random digit dialing techniques.
- Interviews were 51% landline and 49% 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+

Estimated 168 Million

% familiar with the term podcasting

2006: 22%
2007: 37%
2008: 37%
2009: 43%
2010: 45%
2011: 45%
2012: 46%
2013: 46%
2014: 48%
2015: 49%
2016: 55%
2017: 60%
Ever Listened to Podcasts

Total Population 12+

% ever listened 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%
- 2017: 40%

Estimated 112 Million
Monthly Podcast Listening

Total Population 12+

% listening to a podcast in last month

2008: 9%
2009: 11%
2010: 12%
2011: 12%
2012: 14%
2013: 12%
2014: 15%
2015: 17%
2016: 21%
2017: 24%

Estimated 67 Million
Podcast Consumers - Gender

Monthly Podcast Consumers 12+

- Men: 56%
- Women: 44%
**Podcast Consumers - Age**

**U.S. Population 12+**
- Age 18-34: 28%
- Age 12-17: 9%
- Age 35-54: 31%
- Age 55 and older: 32%

**Monthly Podcast Consumers 12+**
- Age 18-34: 44%
- Age 35-54: 33%
- Age 12-17: 7%
- Age 55 and older: 16%
Monthly Podcast Listening

% listening to a podcast in last month

- **Age 55+**: 2013: 7%, 2014: 7%, 2015: 10%, 2016: 11%, 2017: 12%
Podcast Consumers - Household Income

Annual Household Income:

U.S. Population 18+

- $150K or more: 35%
- $100K-$150K: 10%
- $75K-$100K: 12%
- $75K-$100K: 13%

Monthly Podcast Consumers 18+

- $150K or more: 45%
- $100K-$150K: 16%
- $75K-$100K: 15%
- $75K-$100K: 14%
Podcast Consumers - Education

- **U.S. Population 18+**
- **Monthly Podcast Consumers 18+**

<table>
<thead>
<tr>
<th>Education Level</th>
<th>U.S. Population 18+</th>
<th>Monthly Podcast Consumers 18+</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School or less</td>
<td>27%</td>
<td>15%</td>
</tr>
<tr>
<td>One to three years of college</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>Four-year college degree</td>
<td>19%</td>
<td>27%</td>
</tr>
<tr>
<td>Some grad school or advanced degree</td>
<td>22%</td>
<td>30%</td>
</tr>
</tbody>
</table>
Podcast Consumers - Employment

- U.S. Population 18+
- Monthly Podcast Consumers 18+

Employed full-time: 49% (63%)
Employed part-time: 11% (12%)
Temporarily unemployed: 5% (3%)
Homemaker: 6% (5%)
Retired: 21% (8%)
Student: 6% (6%)
Weekly Podcast Listening

Total Population 12+

% listening to a podcast in last week

- 2013: 7%
- 2014: 8%
- 2015: 10%
- 2016: 13%
- 2017: 15%

Estimated 42 Million
Average Time “Weekly Podcast Listeners” Spend Listening to Podcasts

Weekly Podcast Consumers 12+

Mean: 5 hours 7 minutes

- 1 hour to less than 3 hours: 36%
- 3 hours to less than 5 hours: 22%
- 5 hours to less than 10 hours: 13%
- 10 hours or more: 15%
- Don't Know: 1%
- Less than one hour: 13%
Number of Podcasts Listened to in Last Week

Weekly Podcast Consumers 12+

- One: 16%
- Two: 24%
- Three: 19%
- Four or Five: 20%
- Six to Ten: 13%
- 11 or more: 8%

Average of five podcasts listened per week.
How Do Podcast Consumers Listen to Podcasts?

Ever Listened to a Podcast 12+

- Click on podcast and listen immediately: 77%
- Download podcast manually and listen later: 41%
- Subscribe to podcast and download automatically to listen later: 27%

% ever using method to listen to a podcast
Number of Podcasts Subscribed to

Monthly Podcast Consumers 12+ who subscribe to podcasts

- Four to five: 20%
- Three: 9%
- Two: 16%
- One: 17%
- Eleven or more: 11%
- Six to ten: 24%
- Don’t Know: 3%

Average of six podcasts subscribed to.
Method: Monthly Podcast Consumers Use Most Often to Listen to Podcasts

Monthly Podcast Consumers 12+

- Click and listen immediately: 62%
- Download manually to listen later: 16%
- Subscribe to and download automatically to listen later: 19%
- Don’t Know: 3%
Device Monthly Podcast Consumers Use Most Often to Listen to Podcasts

Monthly 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>
<tr>
<td>2017</td>
<td>31%</td>
<td>69%</td>
</tr>
</tbody>
</table>
Device Used Most Often to Listen to Podcasts

### Monthly Podcast Consumers
- **Computer**: 31%
- **Smartphone/tablet/portable device**: 69%

### Podcast Subscribers
- **Computer**: 19%
- **Smartphone/tablet/portable device**: 81%
### Years Listening to Podcasts

*"For how long have you been listening to podcasts?"

<table>
<thead>
<tr>
<th></th>
<th>Ever listened to a podcast</th>
<th>Monthly Podcast Consumers</th>
<th>Weekly Podcast Consumers</th>
<th>Podcast Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 years or more</td>
<td>16%</td>
<td>20%</td>
<td>21%</td>
<td>25%</td>
</tr>
<tr>
<td>3 years to &lt; than 5 years</td>
<td>15%</td>
<td>15%</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>1 year to &lt; than 3 years</td>
<td>31%</td>
<td>32%</td>
<td>35%</td>
<td>31%</td>
</tr>
<tr>
<td>6 months to &lt; than 1 year</td>
<td>19%</td>
<td>15%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Less than 6 months</td>
<td>19%</td>
<td>18%</td>
<td>12%</td>
<td>13%</td>
</tr>
</tbody>
</table>
Podcast Listening Locations

“Have you ever listened to a podcast...?”

Monthly Podcast Consumers 12+

<table>
<thead>
<tr>
<th>Location</th>
<th>% Ever Listen to Podcasts in Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home</td>
<td>84%</td>
</tr>
<tr>
<td>In a car/truck</td>
<td>65%</td>
</tr>
<tr>
<td>Walking around/On foot</td>
<td>42%</td>
</tr>
<tr>
<td>At work</td>
<td>39%</td>
</tr>
<tr>
<td>At a gym/Working out</td>
<td>29%</td>
</tr>
<tr>
<td>Riding public transportation</td>
<td>29%</td>
</tr>
</tbody>
</table>

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Where are Podcasts Most Often Listened to?

Monthly Podcast Consumers 12+

- At home: 51%
- At work: 14%
- In a car/truck: 22%
- While riding public transportation: 3%
- Other: 10%
Amount of Podcast Episode Listened to

Monthly Podcast Consumers 12+

- Most of the podcast: 44%
- The entire podcast episode: 42%
- Less than half the podcast: 11%
- Just the beginning of the podcast: 3%
Time Between Downloading Last Podcast and Listening to It

Monthly Podcast Consumers 12+ who download podcasts to listen at a later time

- Within 24 hours of downloading it: 47%
- Within 48 hours of downloading it: 19%
- Within a week of downloading it: 16%
- Longer than a week after downloading it: 8%
- Don’t Know: 2%
Percent of all podcasts downloaded that are listened to

Monthly Podcast Consumers 12+ who download podcasts to listen at a later time

- 1%-25%: 11%
- 26%-50%: 19%
- 51%-75%: 15%
- 76%-100%: 55%
Public Radio Podcast Listening

- Ever listened to a podcast: 38%
- Monthly Podcast Consumers: 44%
- Weekly Podcast Consumers: 43%
- Podcast Subscribers: 55%

% currently ever listen to podcasts from Public Radio producers
## Social Media Brand Usage

#### Any Social Media Brand

<table>
<thead>
<tr>
<th>Social Media Brand</th>
<th>U.S. Population 12+</th>
<th>Monthly Podcast Consumers 12+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Social Media Brand</td>
<td>81%</td>
<td>94%</td>
</tr>
<tr>
<td>Facebook</td>
<td>67%</td>
<td>73%</td>
</tr>
<tr>
<td>Instagram</td>
<td>34%</td>
<td>48%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>30%</td>
<td>41%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>29%</td>
<td>39%</td>
</tr>
<tr>
<td>Twitter</td>
<td>23%</td>
<td>41%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>22%</td>
<td>39%</td>
</tr>
<tr>
<td>WhatsApp</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>Tumblr</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Music.ly</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

% currently ever use social media brand
Frequency of Social Media Usage
“How often do you use any social networking site or service?”

U.S. Population 12+
- At least "several times a day" 52%
- Less often than "several times a day" 48%

Monthly Podcast Consumers 12+
- At least "several times a day" 64%
- Less often than "several times a day" 36%
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: 31%
- No: 69%

Monthly Podcast Consumers 12+

- Yes: 48%
- No: 52%
On-Demand Video Service Subscription

- Netflix: 50% subscription, 67% of U.S. Population 12+ watching
- Amazon Prime: 29% subscription, 46% watching
- Hulu: 14% subscription, 24% watching
- Subscription to any of the above: 58% subscription, 76% of U.S. Population 12+ watching

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

- Netflix: 45% U.S. Population 12+ (60% Monthly Podcast Consumers 12+)
- Amazon Prime Instant Video: 13% (24%)
- Hulu: 10% (17%)
- Used any of the above in the last week: 48% (66%)
Smart Speaker Awareness

- **Amazon Alexa**: 57% aware of smart speaker, 75% U.S. Population 12+
- **Google Home**: 45% aware of smart speaker, 62% U.S. Population 12+
- **Aware of either Amazon Alexa or Google Home**: 63% aware of smart speaker, 80% Monthly Podcast Consumers 12+

*Asked as “Amazon Echo or Amazon Dot, which uses the Alexa voice service”*
Smart Speaker Ownership

- Amazon Alexa*: 5% (U.S. Population 12+) 9% (Monthly Podcast Consumers 12+)
- Google Home: 2% (U.S. Population 12+) 2% (Monthly Podcast Consumers 12+)
- Own either Amazon Alexa or Google Home: 7% (U.S. Population 12+) 11% (Monthly Podcast Consumers 12+)

*Asked as “Amazon Echo or Amazon Dot, which uses the Alexa voice service”
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
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
Over 8,000 one-day audio diaries completed through 2016

Source: Edison Research Share of Ear 2016®
Share of Ear®

On average, people spend 4 hours listening to audio

Source: Edison Research Share of Ear 2016®
Americans’ Share of Time Spent Listening to Audio Sources

Source: Edison Research. Americans spend an average of 3 hours and 50 minutes each day consuming audio. This graph represents the share of time spent with each. Based on a nationally representative sample of 8,593 Americans ages 13+ who completed a 24-hour audio listening diary. For more information contact info@edisonresearch.com
Source: Edison Research. Podcast Listeners (defined as those who reported listening to a podcast in the last 24 hours) spend an average of 5 hours and 57 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 8,593 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%
Mobile Device: 19%
Computer: 11%
CD Player: 4%
SiriusXM Receiver: 6%
TV Audio Channels: 5%
Internet Connected TV/ Device: 2%
CD Player: 4%
Other: 3%

Source: Edison Research Share of Ear 2016®
Share of Ear®
Audio Listening by Device

Source: Edison Research Share of Ear 2016®
39% listened to audio on a smartphone in a day
Share of Ear®
Americans’ Share of Time Spent Listening to Audio Sources on a Smartphone

Streaming Audio 41%
SiriusXM 2%
AM/FM Radio 7%
Other 4%
Podcasts 7%
Owned Music (CDs, Digital Music files, etc.) 39%

Source: Edison Research Share of Ear 2016®
Podcasts 8%
Other 3%
SiriusXM 1%
AM/FM Radio 5%
Owned Music (CDs, Digital Music files, etc.) 38%
Streaming Audio 45%
Source: Edison Research Share of Ear 2016®
The Podcast Consumer - Summary

- Podcasting continues to rise, with Monthly listeners growing from 21% to 24% year over year.

- The audience for podcasts continues to be predominately 18-54, and leans slightly male.

- The Podcast listener remains an affluent, educated consumer—and one that is becoming increasingly more likely to gravitate to ad-free or ad-light subscription experiences.
The Podcast Consumer - Summary

- Clicking on a podcast to listen to it immediately (either streamed or via progressive download) is the dominant paradigm for listening, though 27% do subscribe to podcasts.

- Subscribers tend to have been podcast consumers for longer than non-subscribers, consume more podcasts, and are more likely to use their smartphone as their primary podcast player.
The Podcast Consumer - Summary

- While Home continues to be the most often named location for podcast listening, the vehicle is a strong second.

- Most podcast consumers listen to most of the podcast episodes they download, and the vast majority listen to at least most of each episode.
The Podcast Consumer - Summary

• Podcasts are the number one audio source by time of consumption among podcast listeners.

  ▪ On the smartphone, podcasting’s Share of Ear® is tied with AM/FM content, and leads AM/FM among 13-34 year olds.
A Few Final Thoughts

- Fix discovery, yes—but let’s not forget “push” in a “pull” world.

- The podcast audience is a distinct segment – and the available inventory to reach them is getting smaller.

- Content isn’t “king.” The audience is king. There are huge underserved potential audiences for new forms of spoken word media—so lets not rely on “received wisdom” too much.