



THE PODCAST CONSUMER 2017



#PodCon17

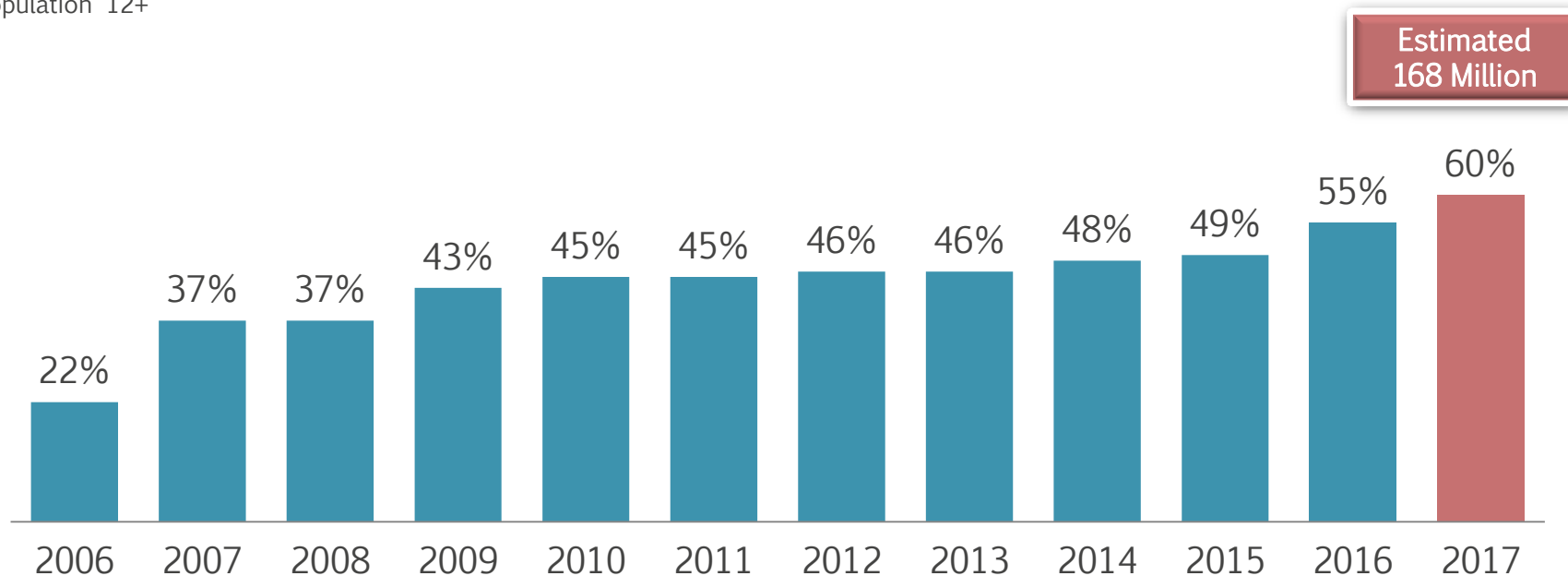


Study Methodology

- 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”

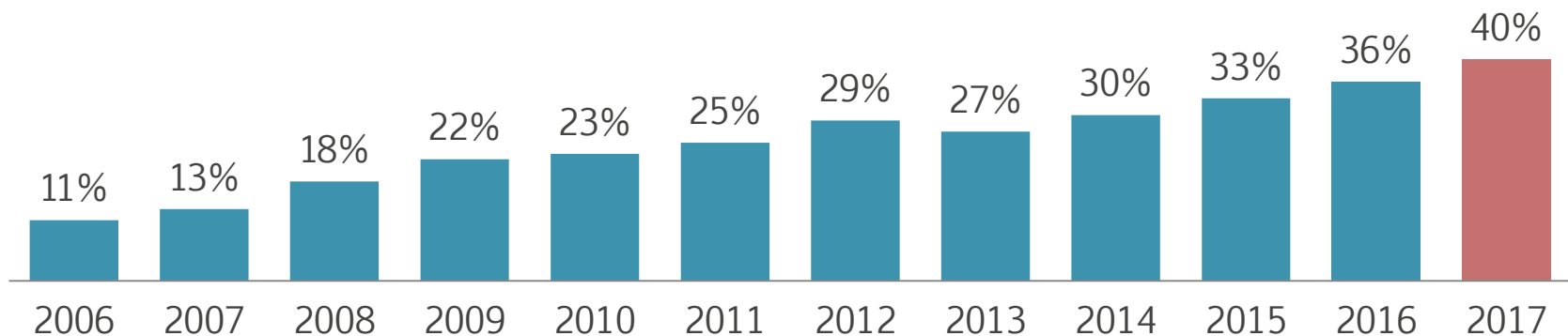
Total Population 12+



Ever Listened to Podcasts

Total Population 12+

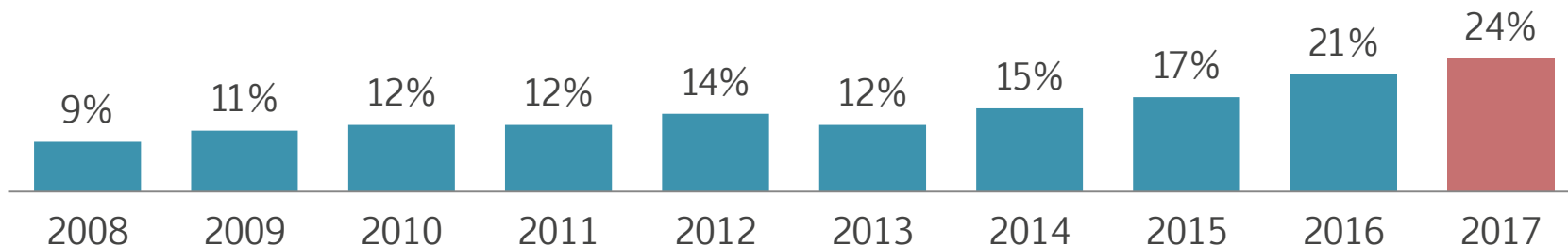
Estimated
112 Million



Monthly Podcast Listening

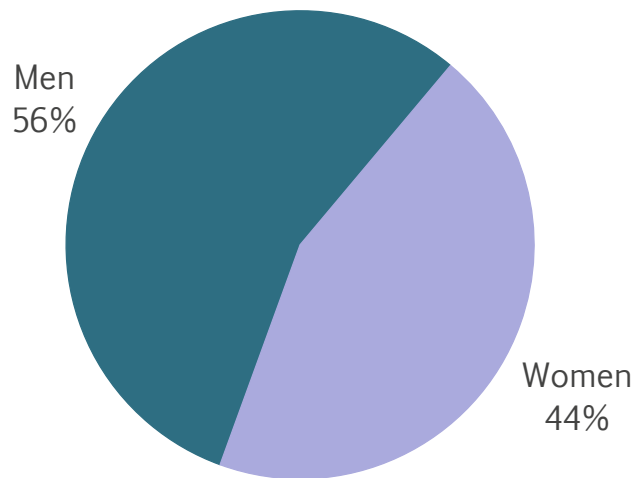
Total Population 12+

Estimated
67 Million



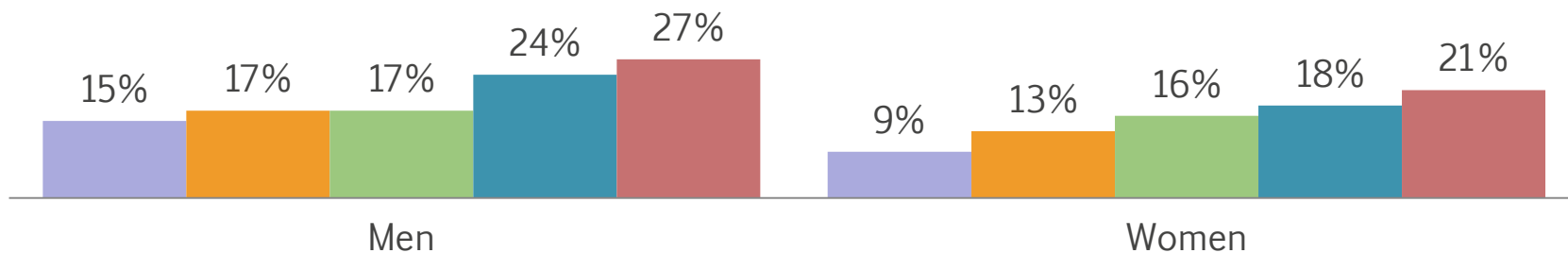
Podcast Consumers - Gender

Monthly Podcast Consumers 12+



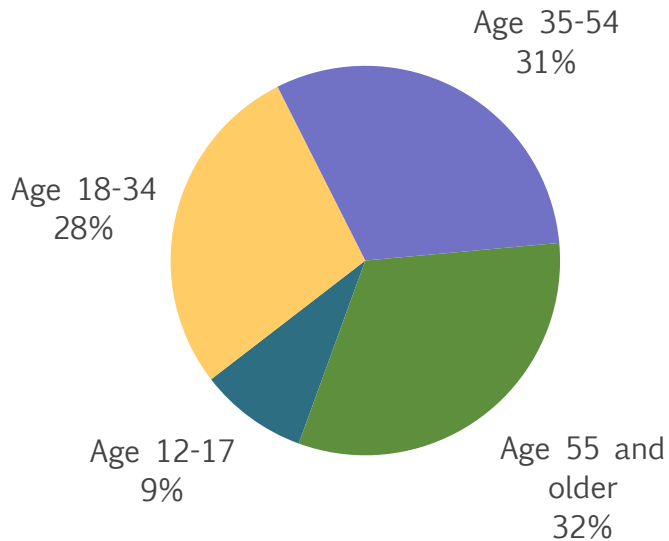
Monthly Podcast Listening

■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017

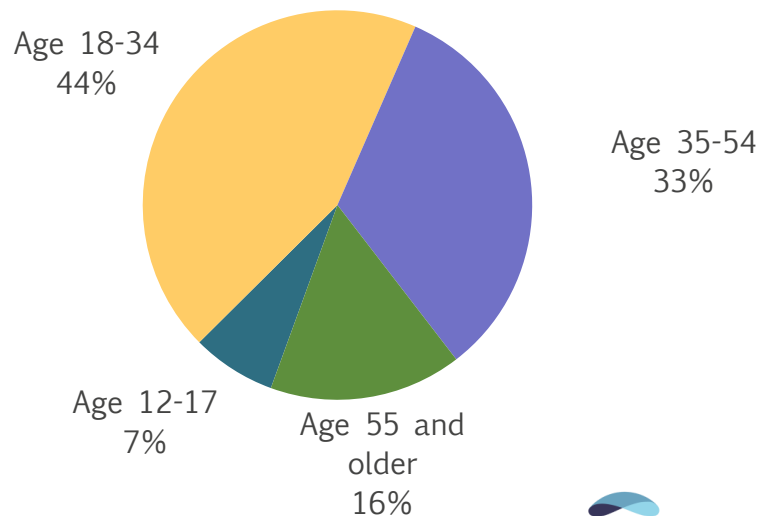


Podcast Consumers - Age

U.S. Population 12+

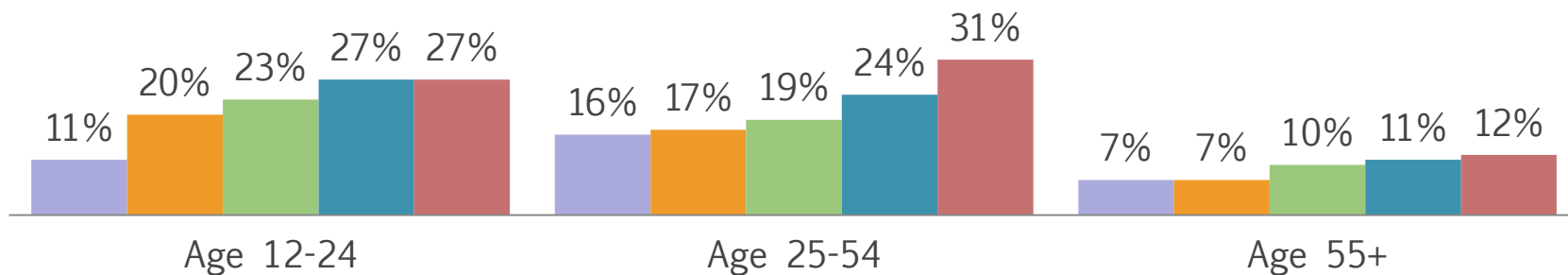


Monthly Podcast Consumers 12+



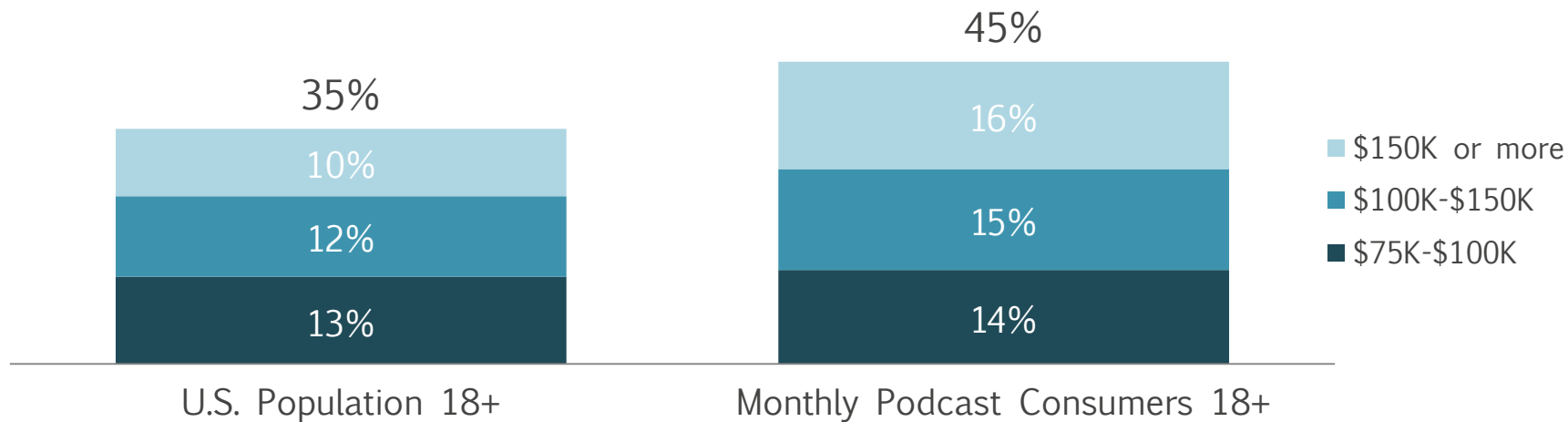
Monthly Podcast Listening

■ 2013 ■ 2014 ■ 2015 ■ 2016 ■ 2017



Podcast Consumers - Household Income

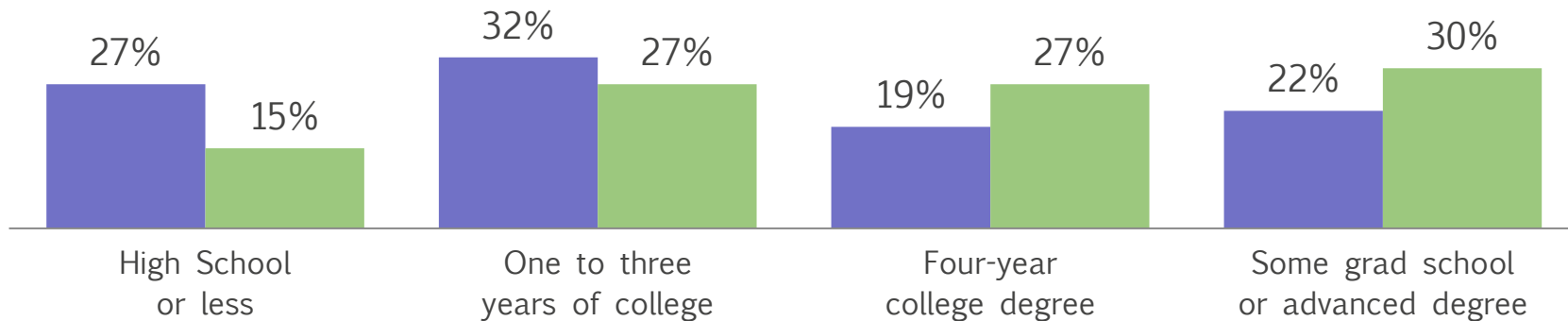
Annual Household Income:



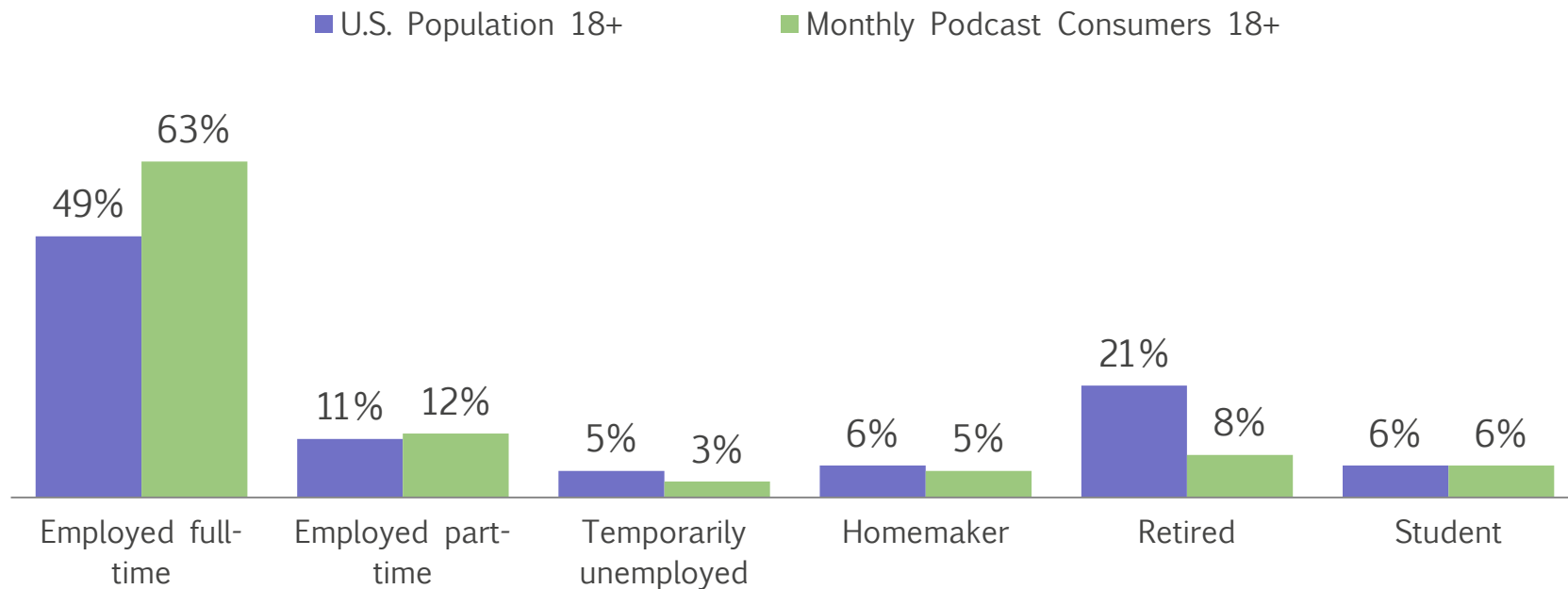
Podcast Consumers - Education

■ U.S. Population 18+

■ Monthly Podcast Consumers 18+

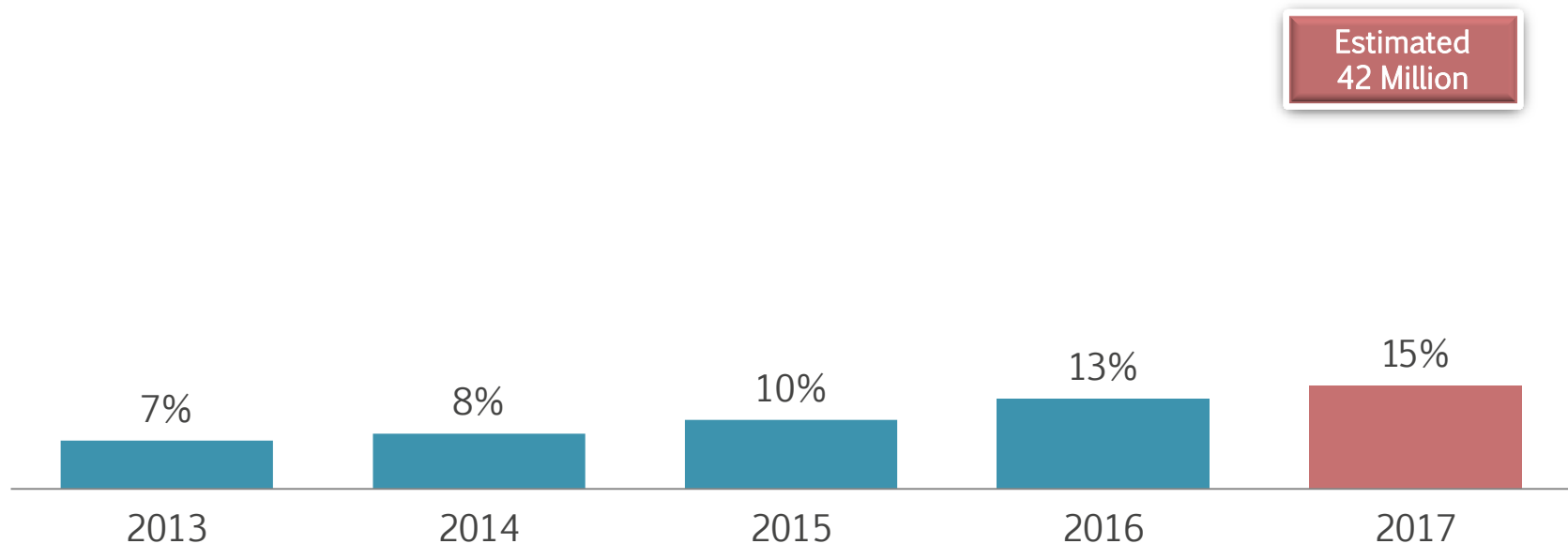


Podcast Consumers - Employment



Weekly Podcast Listening

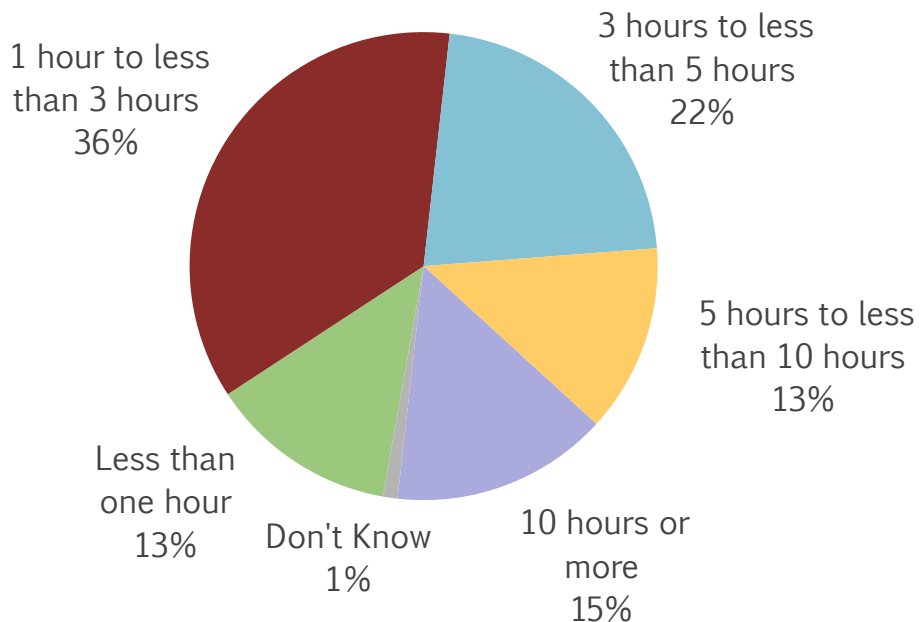
Total Population 12+



Average Time “Weekly Podcast Listeners” Spend Listening to Podcasts

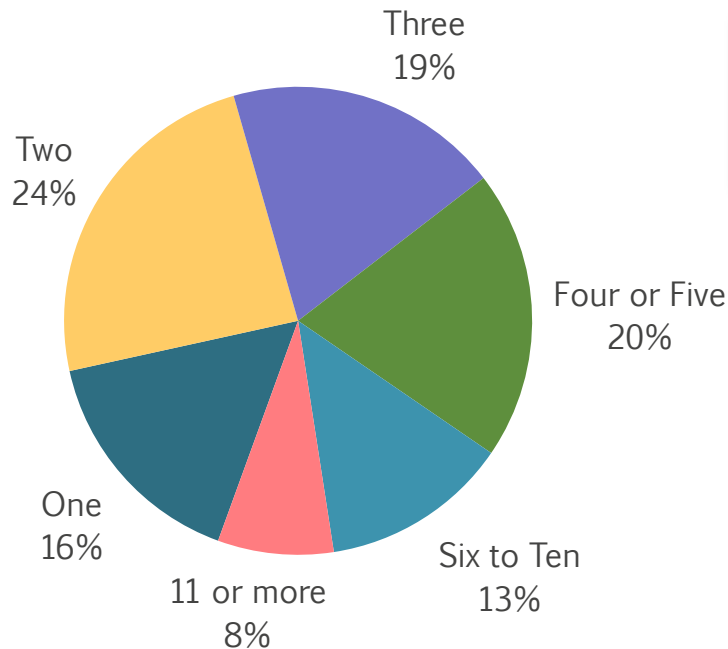
Weekly Podcast Consumers 12+

Mean: 5 hours 7 minutes



Number of Podcasts Listened to in Last Week

Weekly Podcast Consumers 12+



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

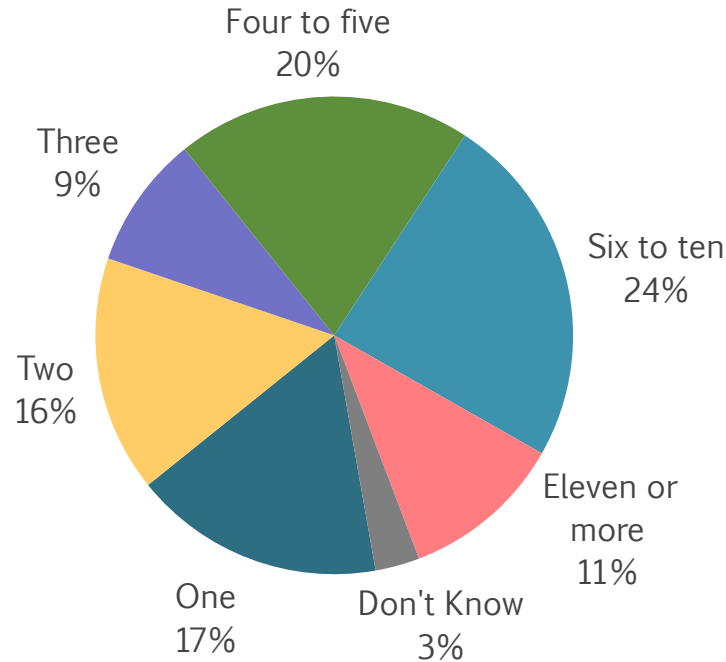


27%

% ever using method to listen to a podcast

Number of Podcasts Subscribed to

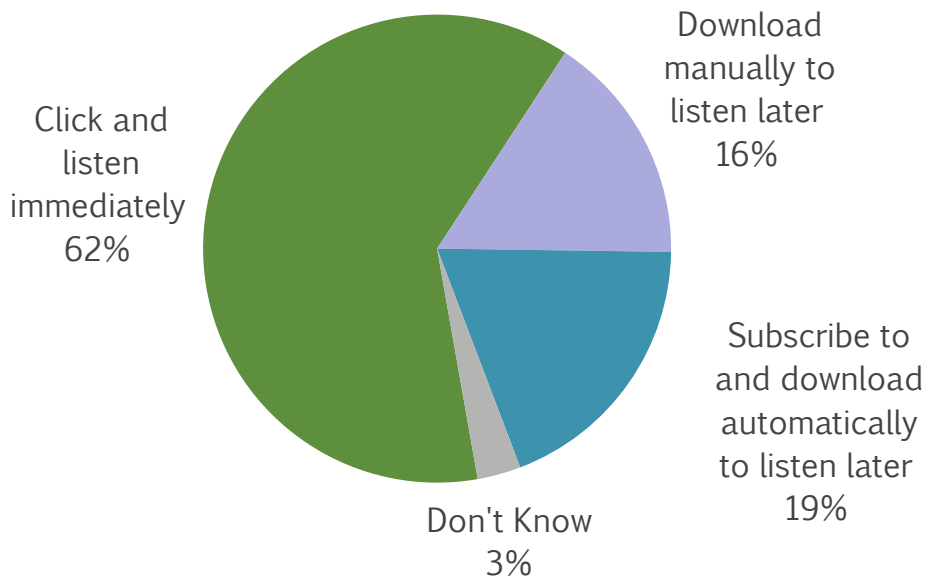
Monthly Podcast Consumers 12+ who subscribe to podcasts



Average of six podcasts
subscribed to

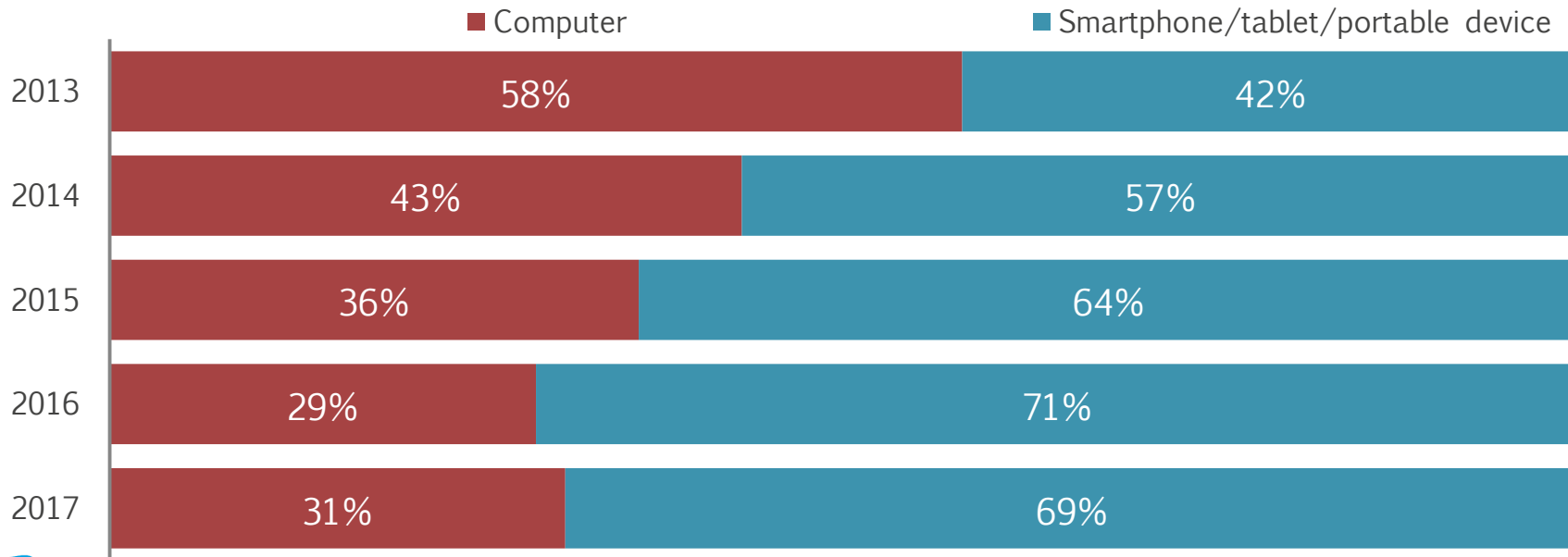
Method Monthly Podcast Consumers Use Most Often to Listen to Podcasts

Monthly Podcast Consumers 12+

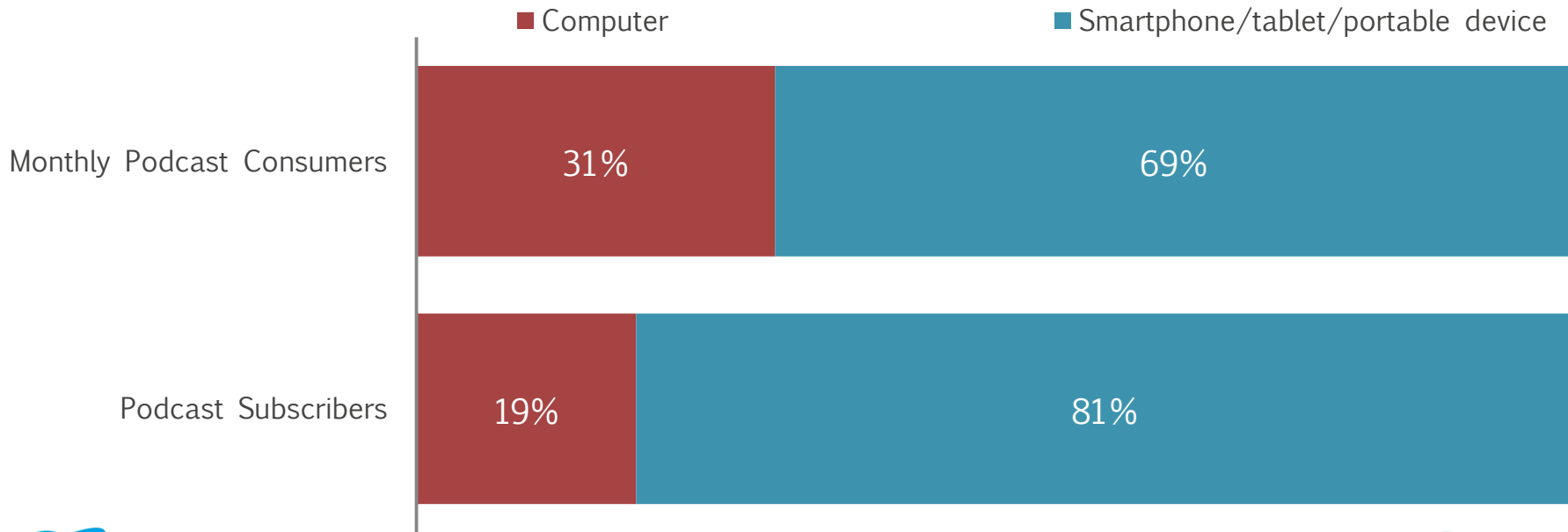


Device Monthly Podcast Consumers Use Most Often to Listen to Podcasts

Monthly Podcast Consumers 12+

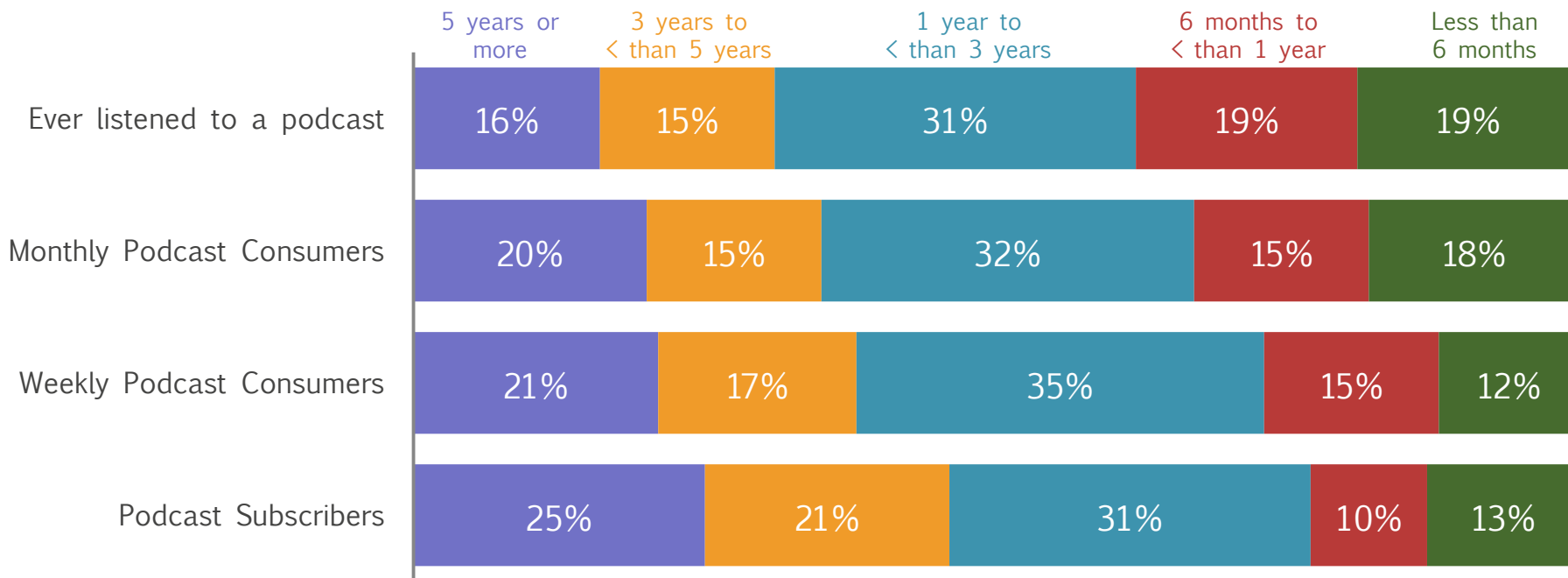


Device Used Most Often to Listen to Podcasts



Years Listening to Podcasts

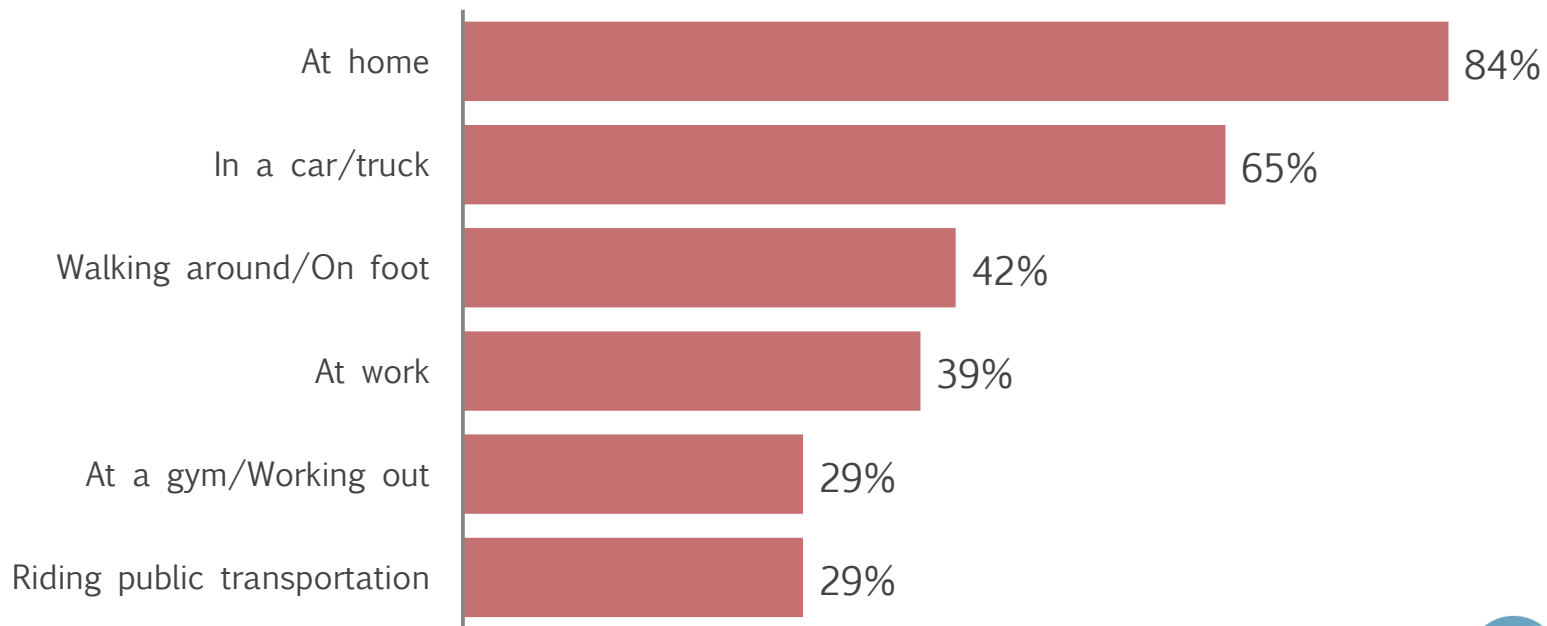
“For how long have you been listening to podcasts?”



Podcast Listening Locations

"Have you ever listened to a podcast...?"

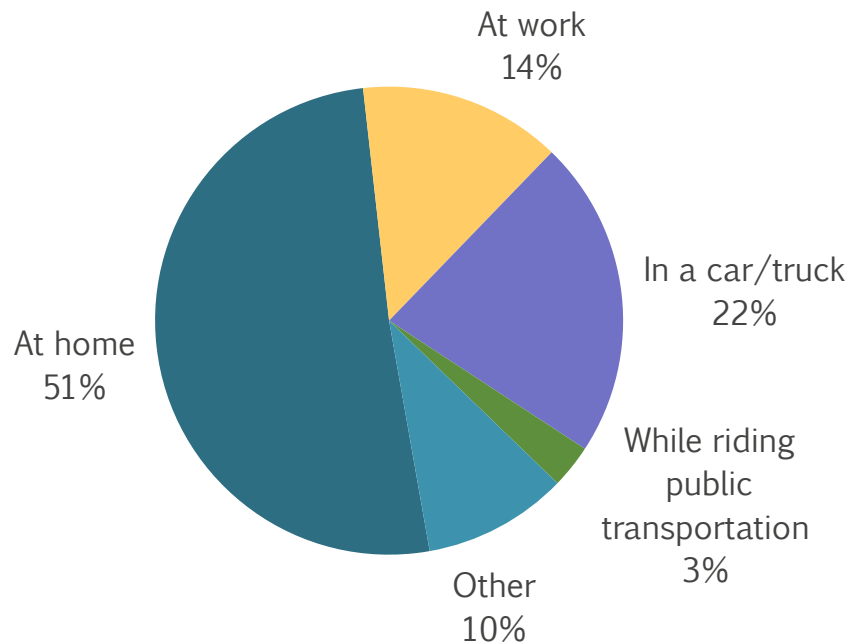
Monthly Podcast Consumers 12+



% ever listen to podcasts in location

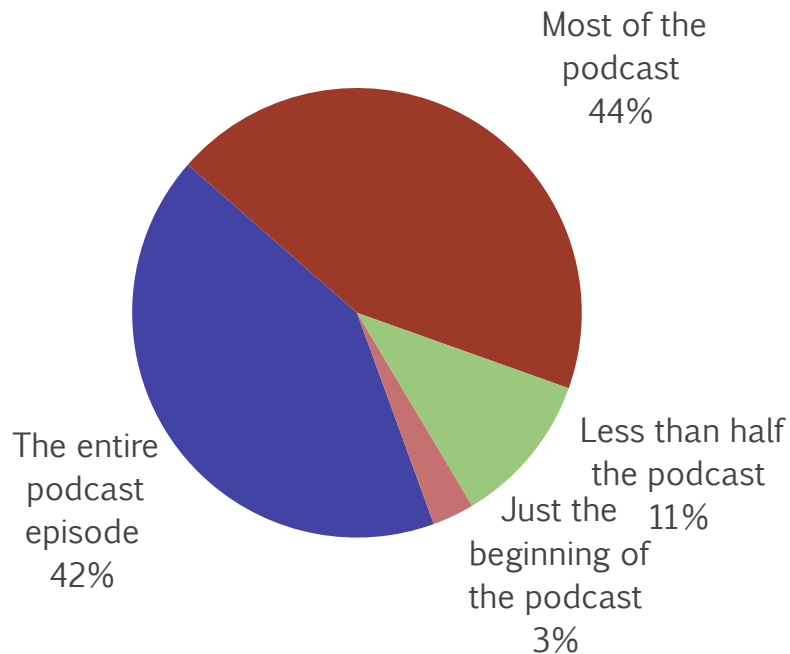
Where are Podcasts Most Often Listened to?

Monthly Podcast Consumers 12+



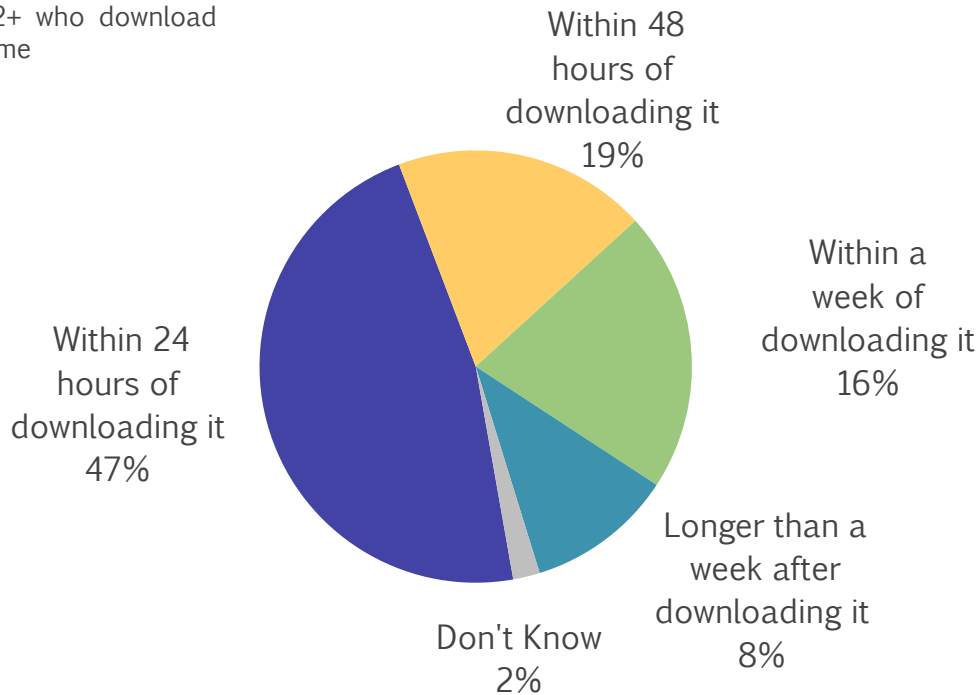
Amount of Podcast Episode Listened to

Monthly Podcast Consumers 12+



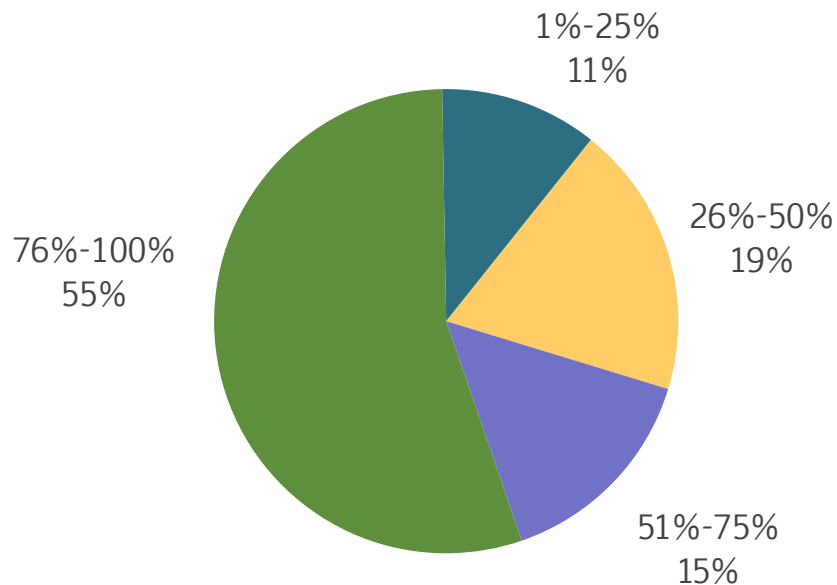
Time Between Downloading Last Podcast and Listening to It

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

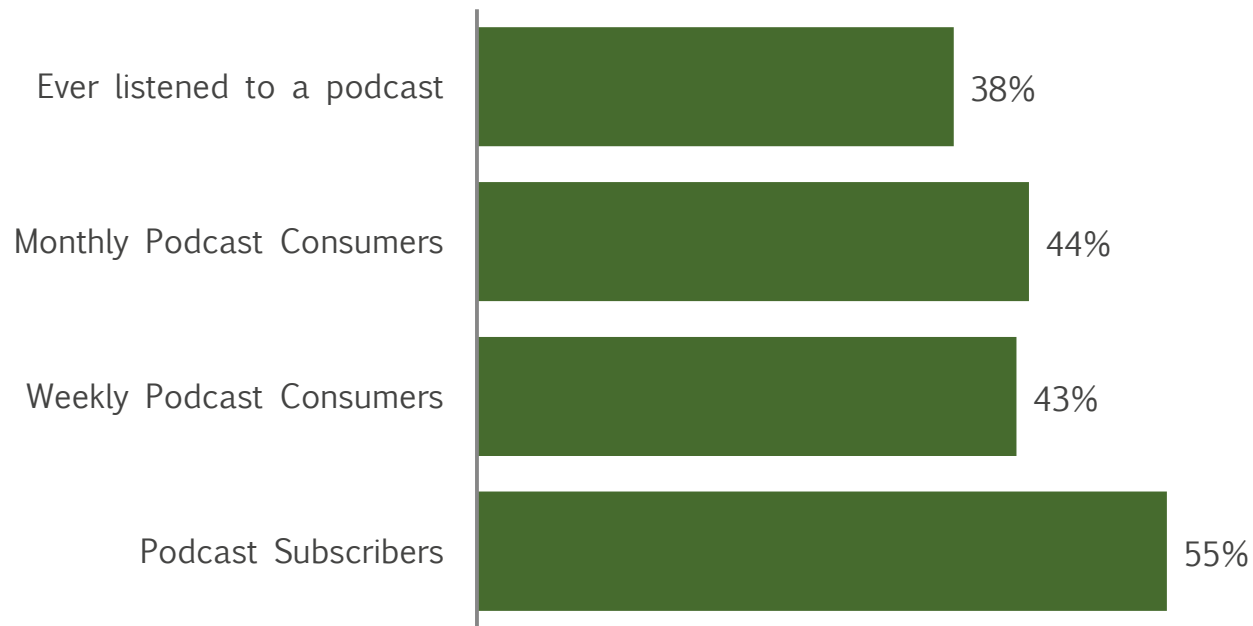


Percent of all podcasts downloaded that are listened to

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

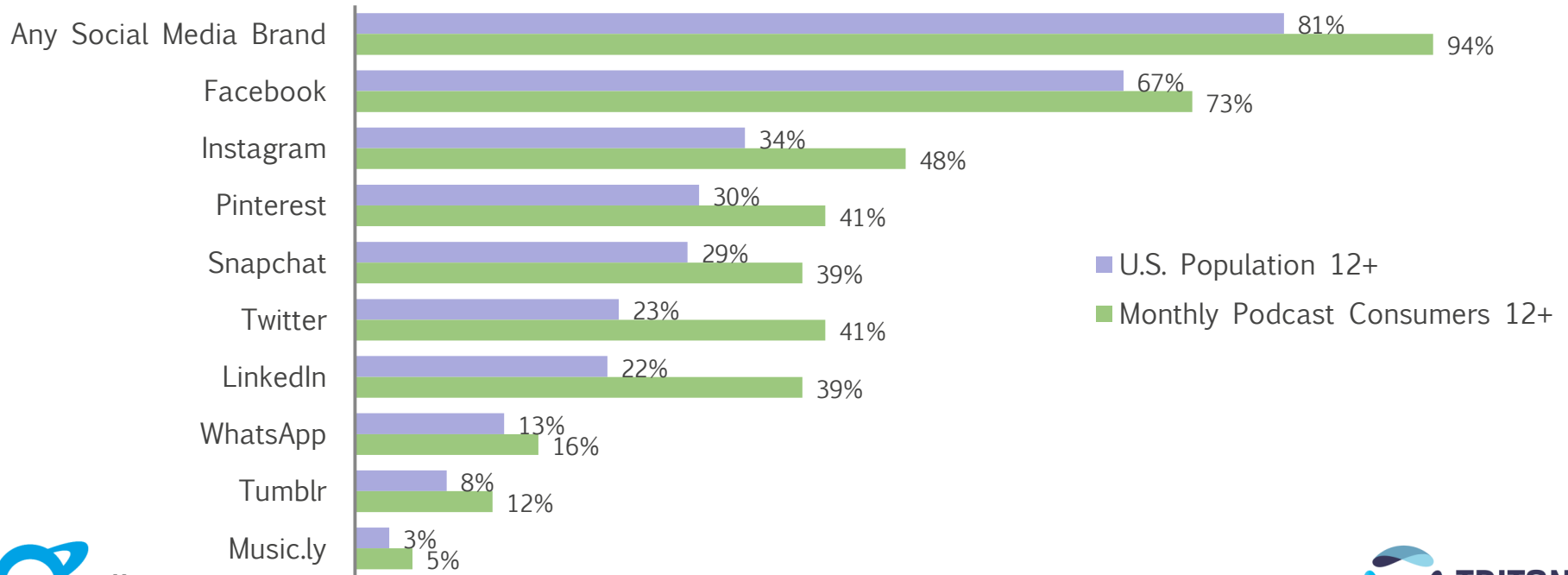


Public Radio Podcast Listening



% currently ever listen to podcasts from Public Radio producers

Social Media Brand Usage



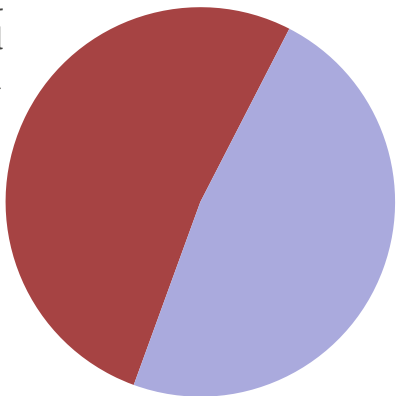
% currently ever use social media brand

Frequency of Social Media Usage

"How often do you use any social networking site or service?"

U.S. Population 12+

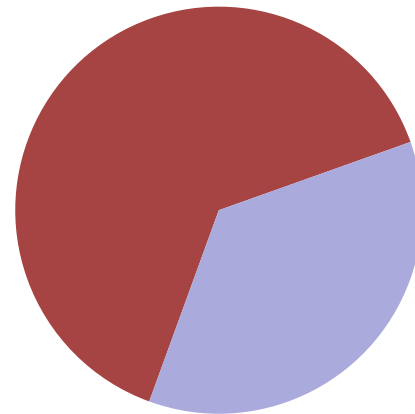
At least
"several
times a
day"
52%



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%

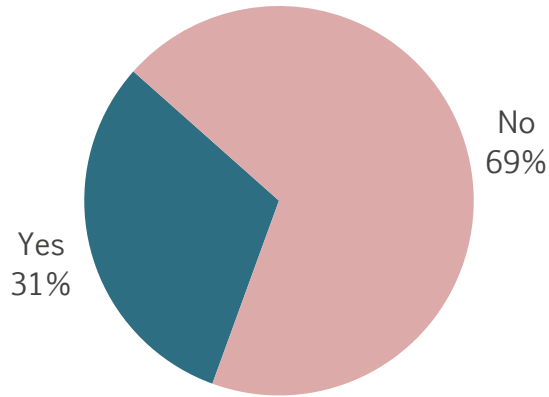


THE INFINITE DIAL
2017

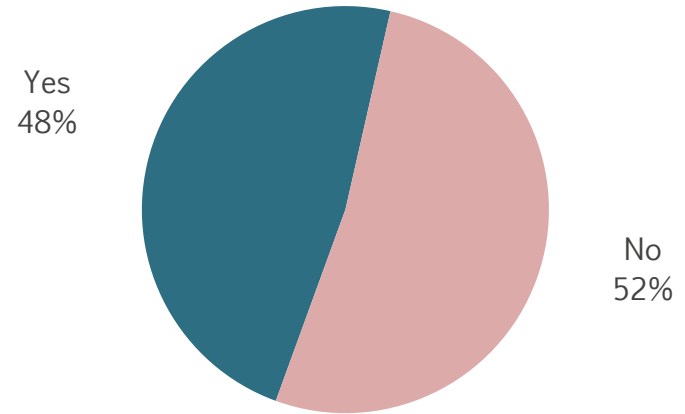
Follow Companies/Brands on Social Media

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

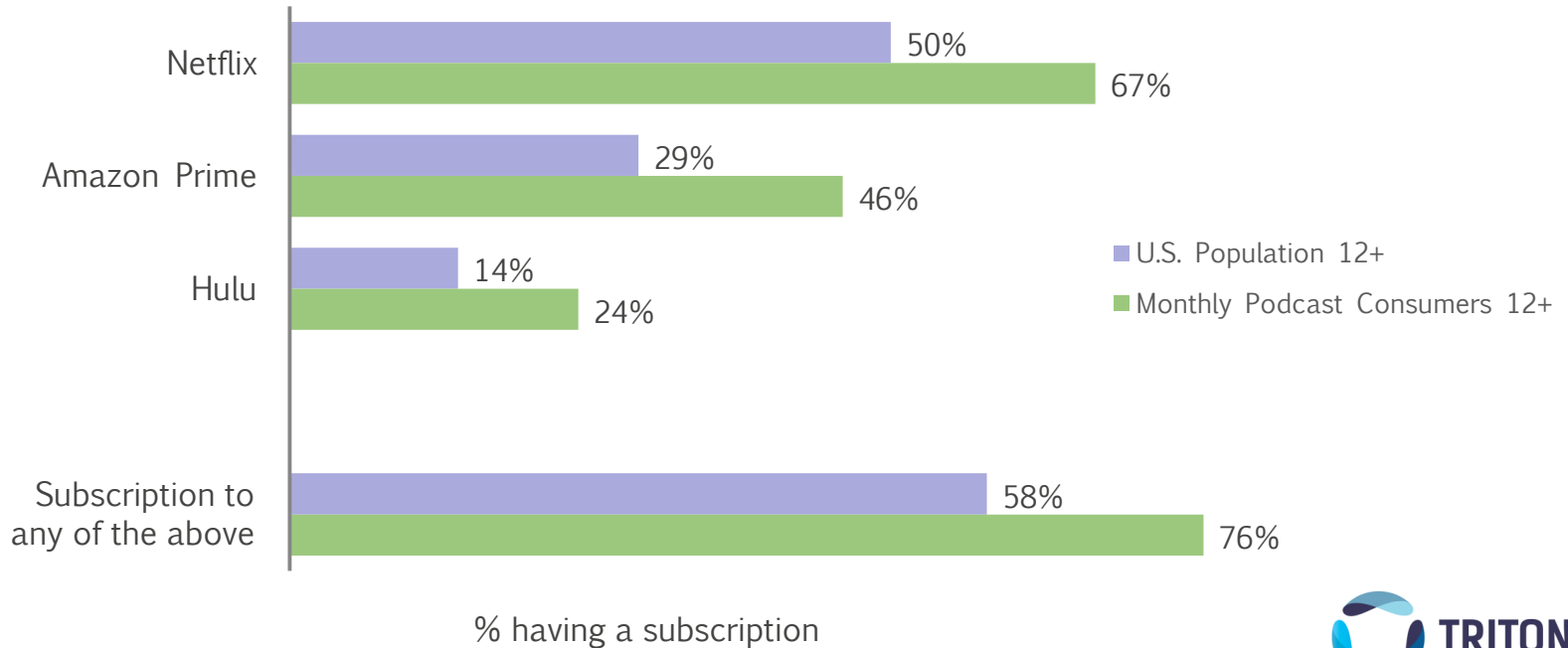
U.S. Population 12+



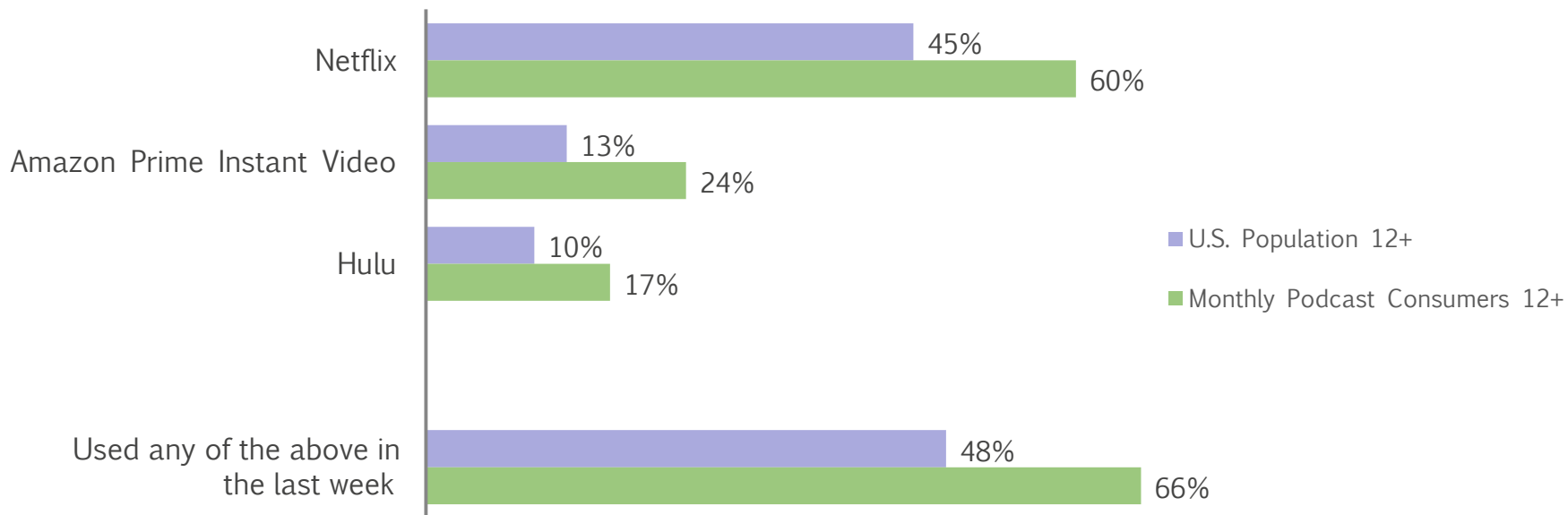
Monthly Podcast Consumers 12+



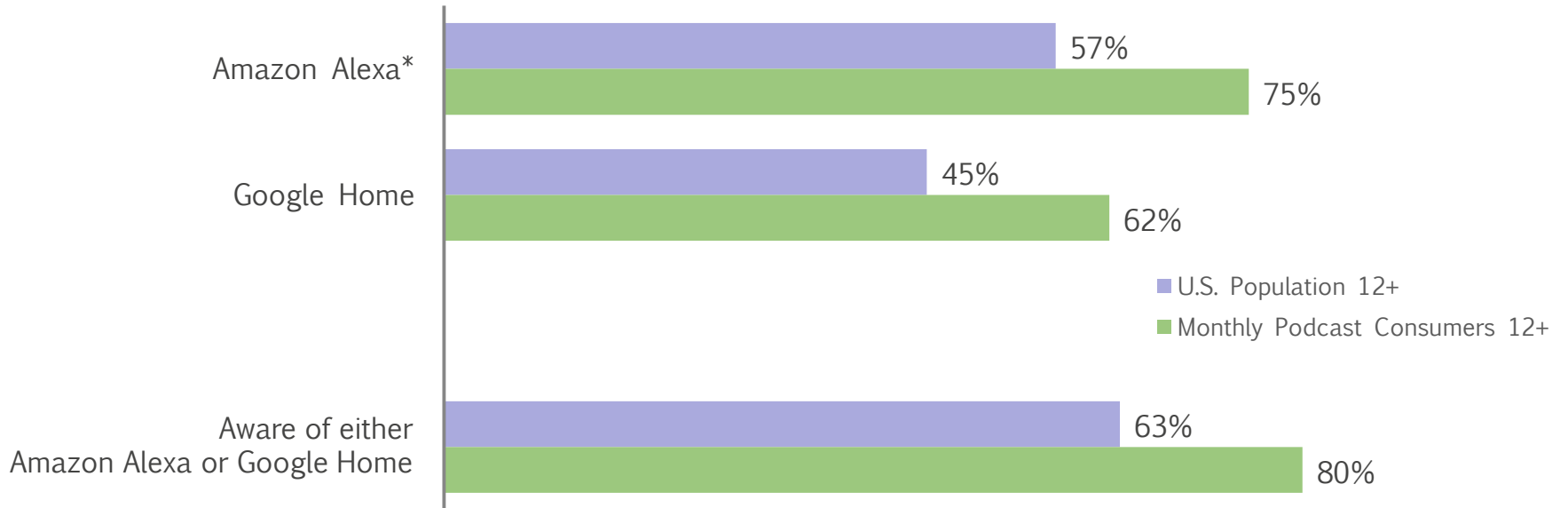
On-Demand Video Service Subscription



Used On-Demand Video Service in Last Week

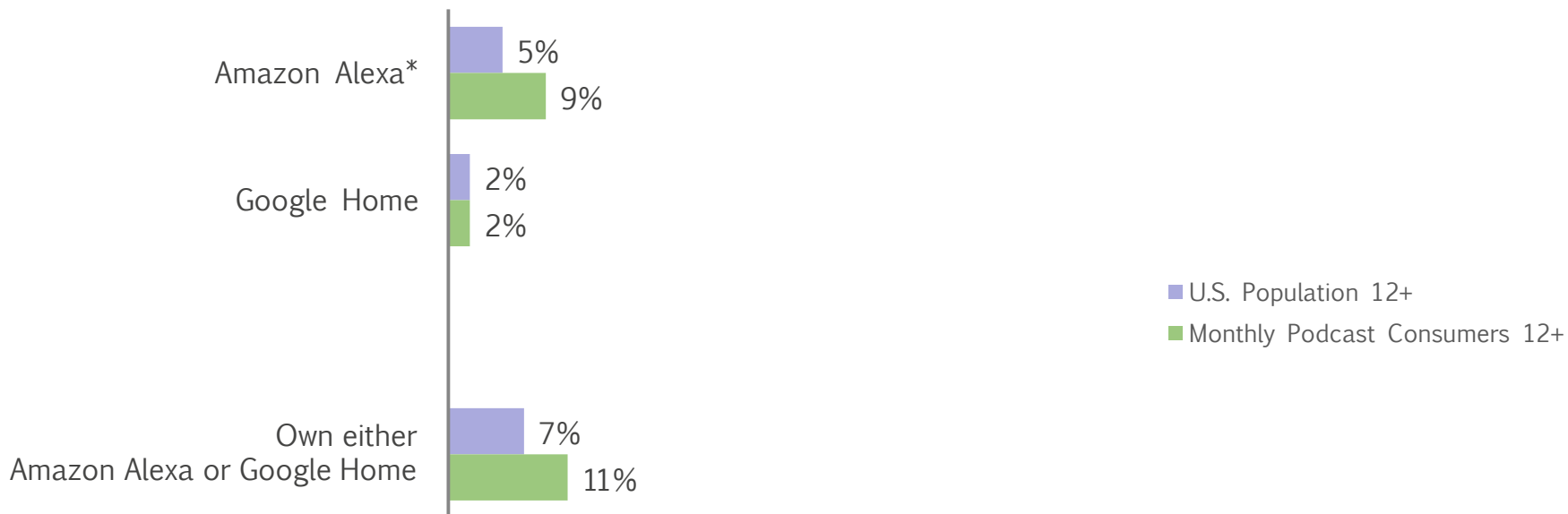


Smart Speaker Awareness



*Asked as "Amazon Echo or Amazon Dot, which uses the Alexa voice service"

Smart Speaker Ownership



*Asked as "Amazon Echo or Amazon Dot, which uses the Alexa voice service"

% owning smart speaker



Share of Ear[®]



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



Share of Ear[®]



**Over 8,000 one-day audio diaries
completed through 2016**



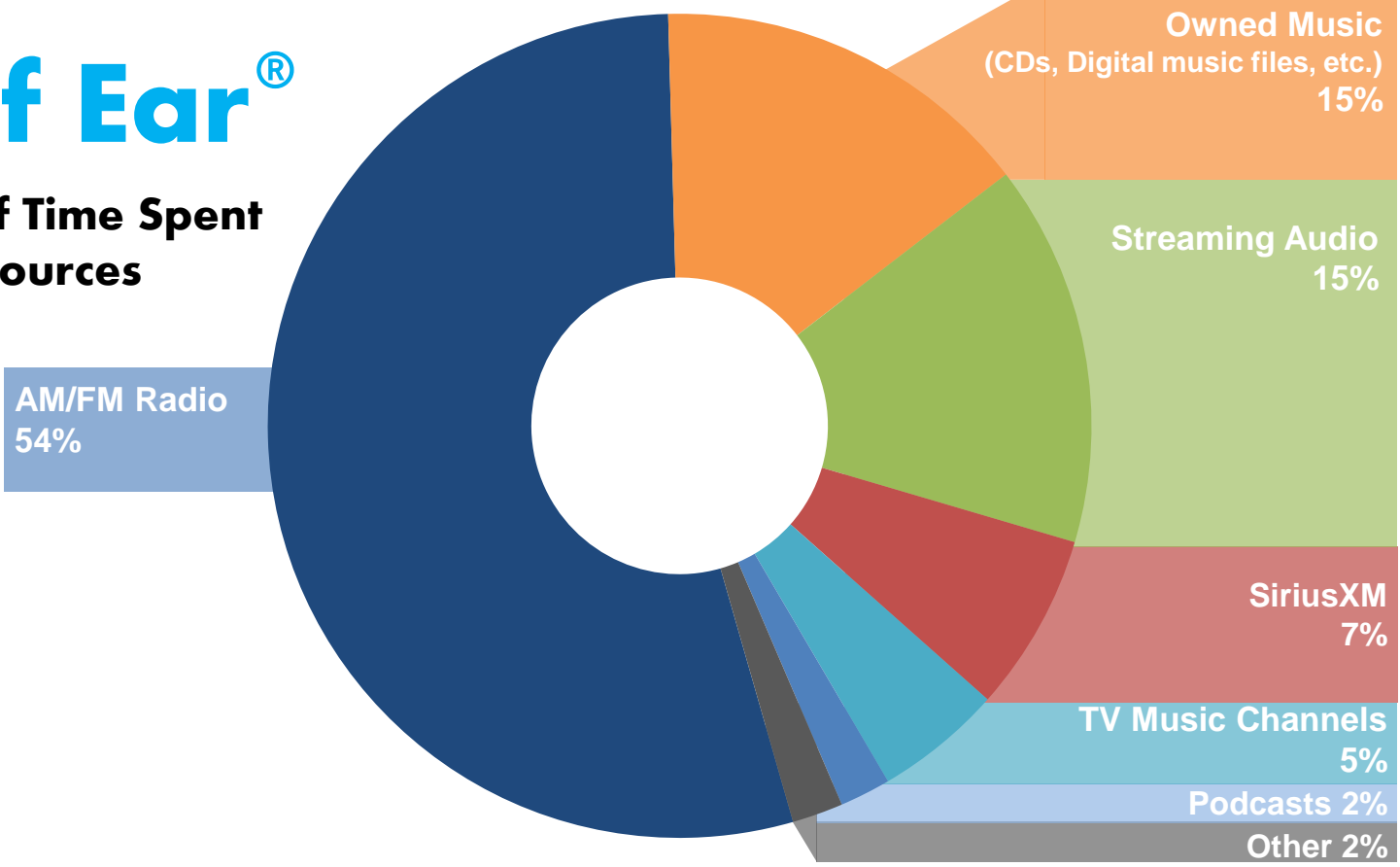
Share of Ear[®]



On average, people spend **4 hours listening to audio**

Share of Ear[®]

Americans' Share of Time Spent Listening to Audio Sources

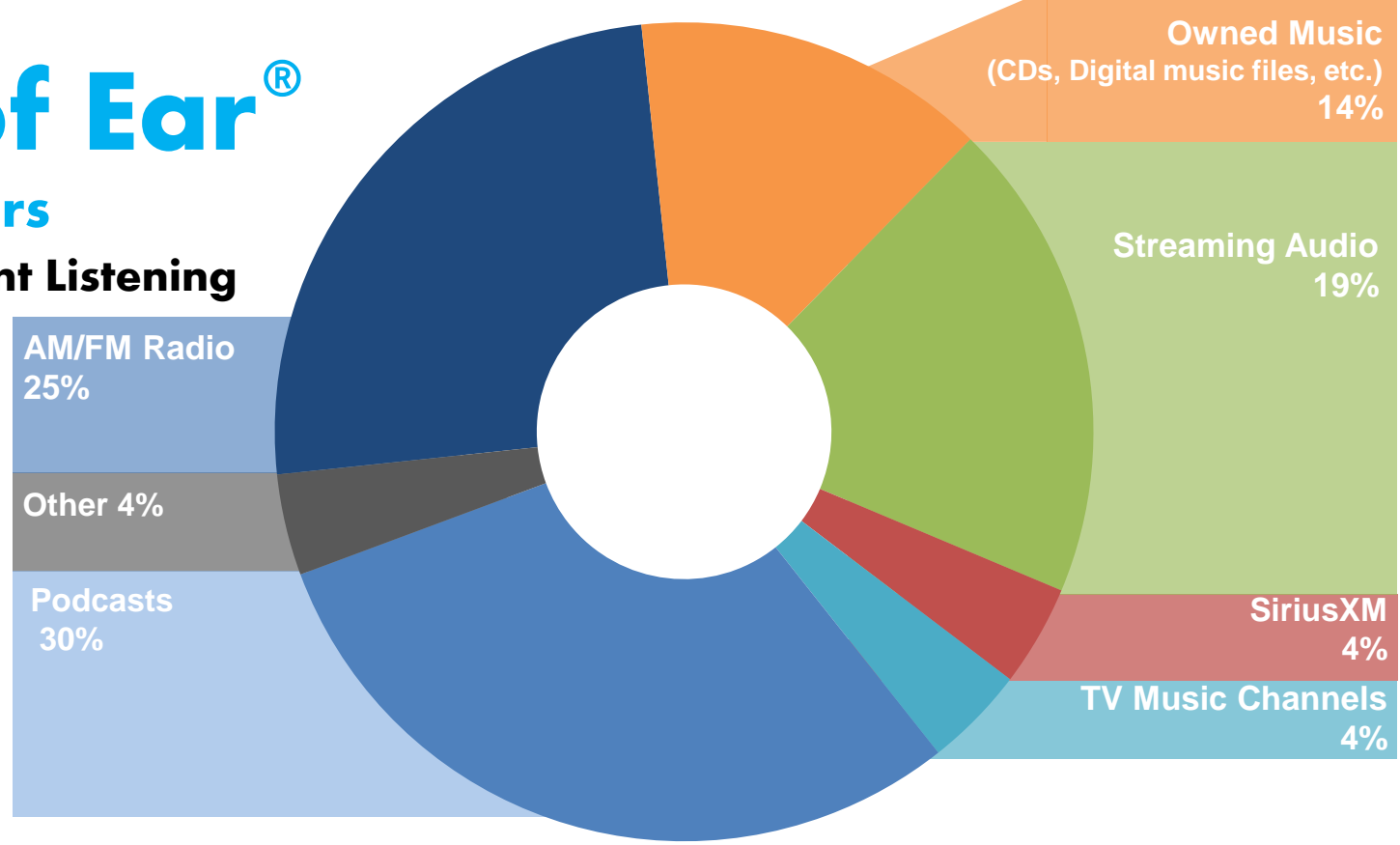


Source: Edison Research. Americans spend an average of 3 hours and 50 minutes each day consuming audio. This graph represents the share of time spent with each. Based on a nationally representative sample of 8,593 Americans ages 13+ who completed a 24-hour audio listening diary. For more information contact info@edisonresearch.com

Share of Ear[®]

Podcast Listeners

Share of Time Spent Listening to Audio Sources

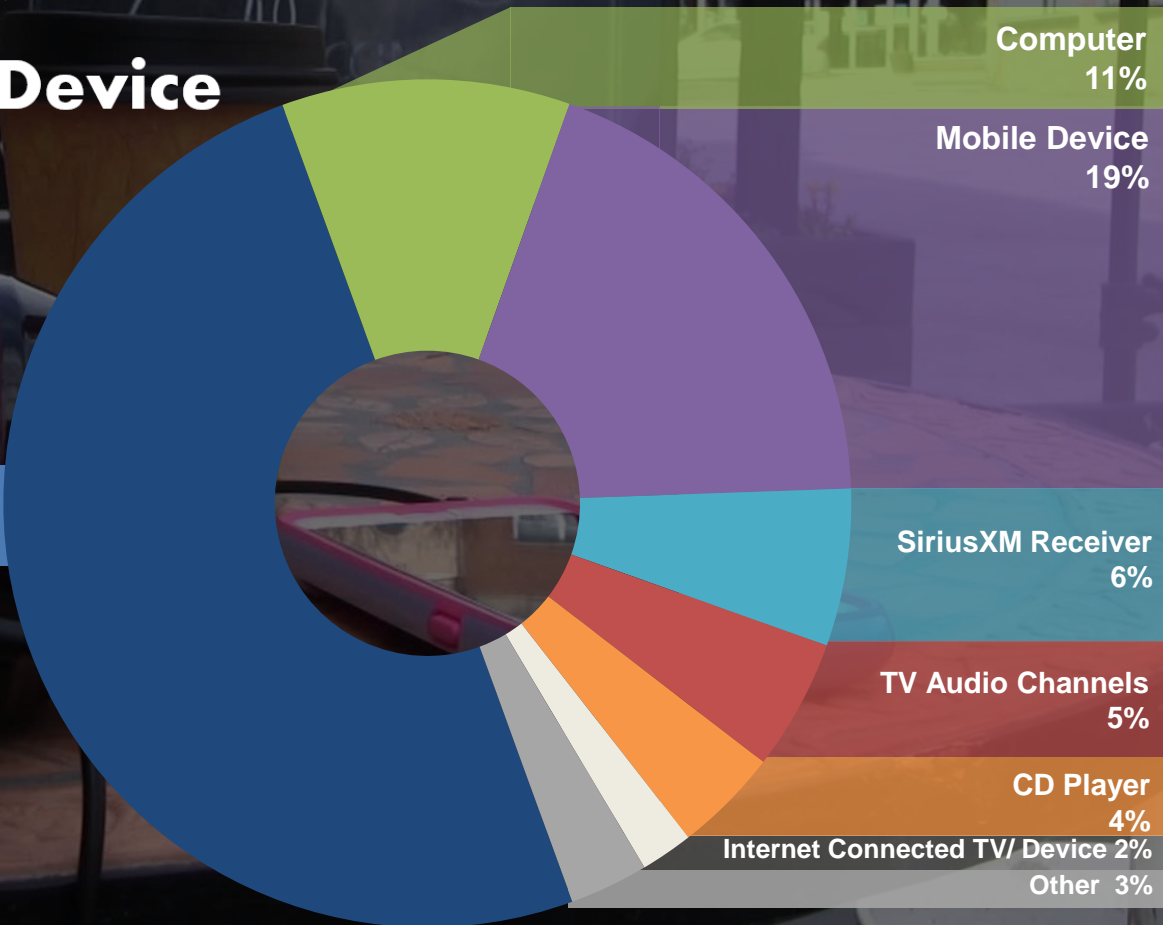


Source: Edison Research. Podcast Listeners (defined as those who reported listening to a podcast in the last 24 hours) spend an average of 5 hours and 57 minutes each day consuming audio. This graph represents the share of time Podcast Listeners spent with each audio source. Based on a nationally representative 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[®]

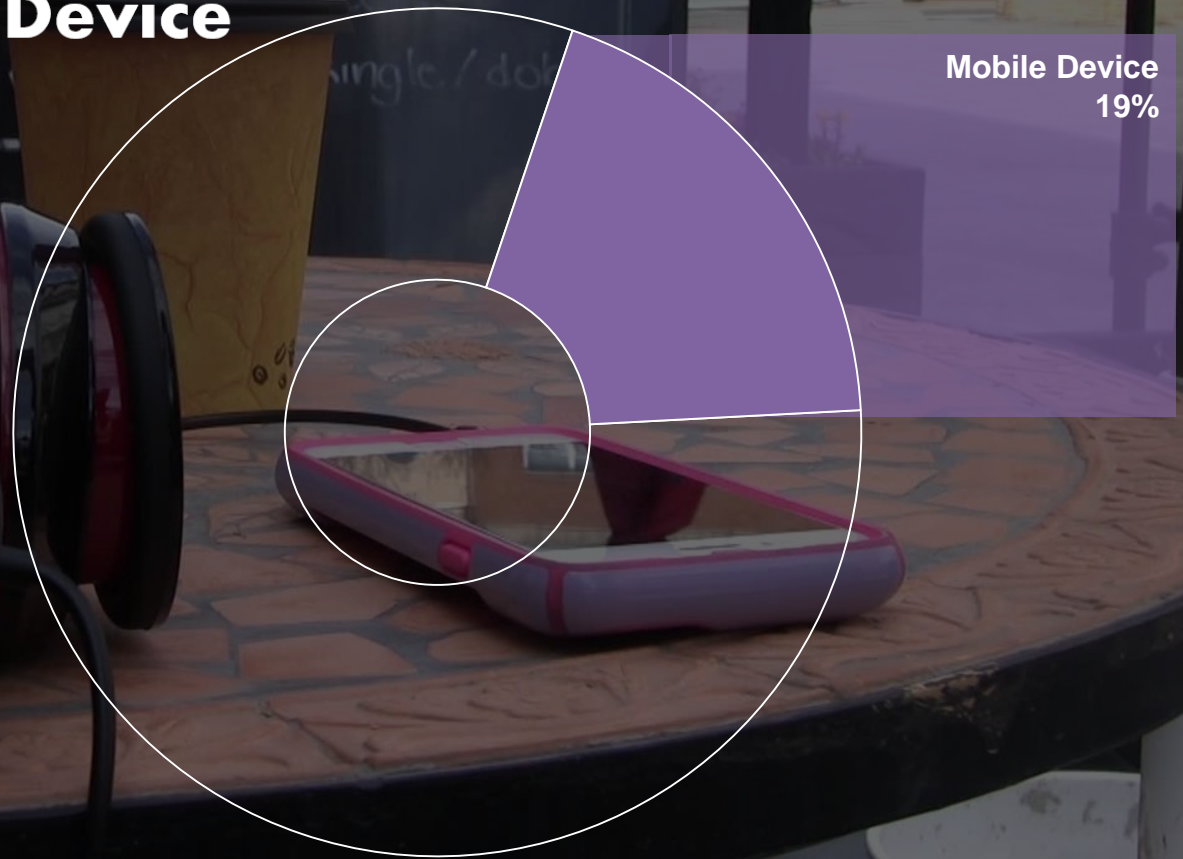
Audio Listening by Device

AM/FM Radio Receiver
50%



Share of Ear[®]

Audio Listening by Device



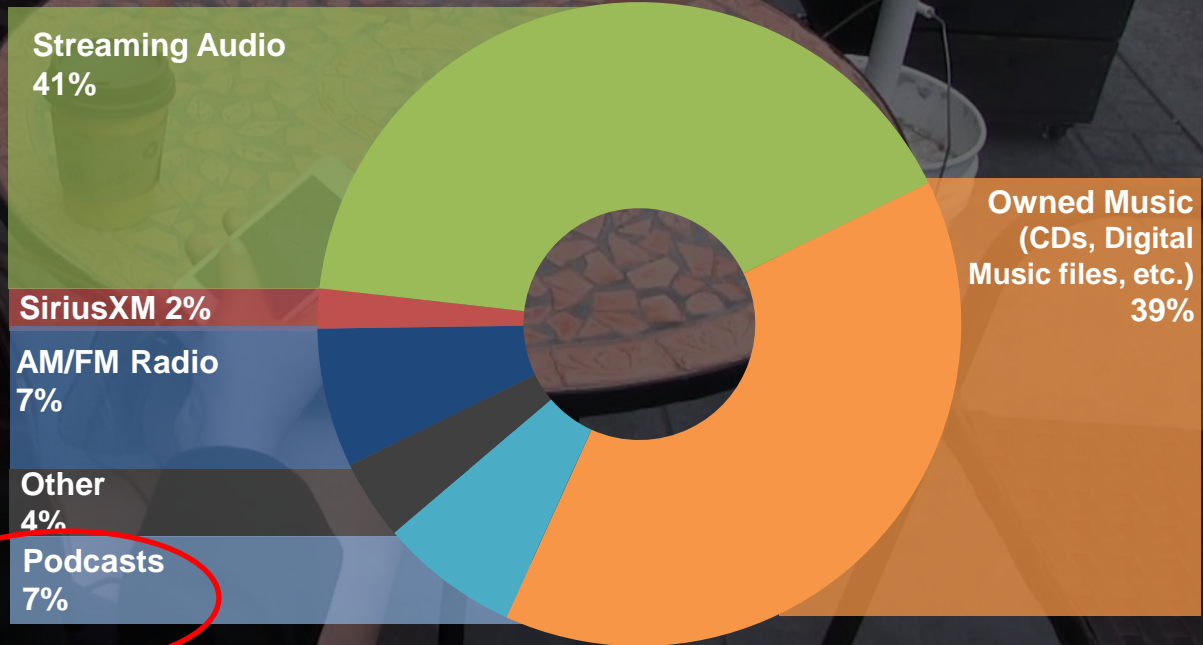
A person wearing large black headphones is walking away from the camera on a paved sidewalk. The background shows a residential street with trees and houses. A semi-transparent dark grey banner is overlaid across the middle of the image, containing text and a large percentage.

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



Share of Ear[®]

Ages 13-34

Americans' Share of Time Spent Listening to Audio Sources on a Smartphone

Streaming Audio
45%

SiriusXM 1%

AM/FM Radio
5%

Other 3%

Podcasts
8%

Owned Music
(CDs, Digital
Music files, etc.)
38%

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.



How you know.SM