Survey Methodology:

- 4,000+ interviews updated 3rd Quarter 2020
- National sample 13+
- Online and offline
  - Tracked since 2014
- Offered in English and Spanish
- 2,000+ interviews fielded during COVID-19 disruptions
WHO ARE SUPER LISTENERS?

SURVEY METHODOLOGY

- 1,000 online interviews conducted in October 2020
- Trended with Super Listeners 2019 study
- All respondents reported listing to podcasts for at least 5 hours per week
- Data were weighted by age, sex, and race to reflect the demographics of weekly podcast listeners as found in the Infinite Dial 2020
**SUPER LISTENER DEMOGRAPHICS: GENDER**

<table>
<thead>
<tr>
<th></th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>56</td>
<td>44</td>
</tr>
<tr>
<td>2020</td>
<td>58</td>
<td>42</td>
</tr>
</tbody>
</table>

Base: Listen to podcasts for at least 5 hours per week
Super Listener Demographics: Age

<table>
<thead>
<tr>
<th></th>
<th>18-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>15</td>
<td>28</td>
<td>24</td>
<td>19</td>
<td>14</td>
</tr>
<tr>
<td>2020</td>
<td>21</td>
<td>24</td>
<td>21</td>
<td>14</td>
<td>20</td>
</tr>
</tbody>
</table>

Base: Listen to podcasts for at least 5 hours per week
WEEKLY TIME SPENT LISTENING TO PODCASTS:

<table>
<thead>
<tr>
<th>Time Range</th>
<th>2019</th>
<th>2020</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Five to six hours</td>
<td>23</td>
<td>27</td>
<td>9.8</td>
</tr>
<tr>
<td>Six to eight hours</td>
<td>20</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>Eight to twelve hours</td>
<td>32</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Twelve hours or more</td>
<td>25</td>
<td>26</td>
<td></td>
</tr>
</tbody>
</table>

Base: Listen to podcasts for at least 5 hours per week
HOW IMPORTANT IS IT TO YOU TO WATCH/LISTEN TO PROGRAMS **WHENEVER** YOU WANT

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Important</th>
<th>Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>45</td>
<td>26</td>
</tr>
<tr>
<td>2020</td>
<td>44</td>
<td>29</td>
</tr>
</tbody>
</table>

% saying "very important" (5) or "important" (4) on a 5-point scale

Base: Listen to podcasts for at least 5 hours per week
HOW IMPORTANT IS IT TO YOU TO WATCH/LISTEN TO PROGRAMS WHEREVER YOU WANT

% saying "very important" (5) or "important" (4) on a 5-point scale

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
How important is it to you to watch/listen unique content that you cannot get elsewhere?

% saying “very important” (5) or “important” (4) on a 5-point scale

2019
- Very important: 29
- Important: 32
- Total: 61

2020
- Very important: 34
- Important: 29
- Total: 63

Base: Listen to podcasts for at least 5 hours per week
IN THE LAST WEEK, HAVE YOU SEEN OR HEARD ADVERTISING IN ANY OF THE FOLLOWING PLACES?

- Podcasts: 85% (2019), 86% (2020)
- Websites: 79% (2019), 81% (2020)
- Social media: 76% (2019), 80% (2020)
- Live or recorded television: 74% (2019), 71% (2020)
- Streaming television: 69% (2019), 64% (2020)
- Streaming radio: 60% (2019), 48% (2020)

% saying “yes”

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
Compared to one year ago, do you think that the total number of ads in the podcasts you regularly listen to has...?

<table>
<thead>
<tr>
<th>Year</th>
<th>Increased</th>
<th>Stayed the same</th>
<th>Decreased</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>49</td>
<td>49</td>
<td>2</td>
</tr>
<tr>
<td>2020</td>
<td>56</td>
<td>40</td>
<td>4</td>
</tr>
</tbody>
</table>

Base: Listen to podcasts for at least 5 hours per week
COMPARED TO ONE YEAR AGO, DO YOU THINK THE LENGTH OF THE AVERAGE ADVERTISING BREAK IN THE PODCASTS YOU REGULARLY LISTEN TO HAS...?

<table>
<thead>
<tr>
<th></th>
<th>Gotten Longer</th>
<th>Stayed about the same</th>
<th>Gotten Shorter</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>35</td>
<td>59</td>
<td>6</td>
</tr>
<tr>
<td>2020</td>
<td>41</td>
<td>50</td>
<td>9</td>
</tr>
</tbody>
</table>

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
HOW IMPORTANT IS IT TO YOU TO LIMIT YOUR EXPOSURE TO ADVERTISING?

2019

Very important: 25
Important: 25
Total: 50

2020

Very important: 27
Important: 23
Total: 50

% saying “very important” (5) or “important” (4) on a 5-point scale

Base: Listen to podcasts for at least 5 hours per week
Which of the following statements best describes how often you skip past the advertising breaks in the podcasts you listen to most often?

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>You very rarely or never skip ads</td>
<td>34</td>
<td>33</td>
</tr>
<tr>
<td>You skip ads some of the time</td>
<td>33</td>
<td>38</td>
</tr>
<tr>
<td>You skip ads most of the time, but not always</td>
<td>21</td>
<td>17</td>
</tr>
<tr>
<td>You always skip ads</td>
<td>12</td>
<td>12</td>
</tr>
</tbody>
</table>

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
Relative to other types of media, there are way too many ads on (Medium)

- Social Media: Strongly agree 31, Agree 28, Total 59
- Live or recorded television: Strongly agree 34, Agree 24, Total 58
- Websites: Strongly agree 27, Agree 27, Total 54
- Streaming radio: Strongly agree 27, Agree 25, Total 52
- AM/FM Radio: Strongly agree 26, Agree 25, Total 51
- Magazines/Newspapers: Strongly agree 28, Agree 22, Total 50
- Streaming television: Strongly agree 26, Agree 22, Total 48
- Podcasts: Strongly agree 18, Agree 20, Total 38

**24% agreeing in 2019

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
PODCAST ADVERTISING: (AGREE/DISAGREE)

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
<th>Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>44%</td>
<td>agree</td>
</tr>
<tr>
<td>2020</td>
<td>49%</td>
<td>agree</td>
</tr>
</tbody>
</table>

Your opinion of a company is more positive when you hear it mentioned on a podcast you regularly listen to.

% agreeing (‘4’ or ‘5’ on a 5-point scale)

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
PODCAST ADVERTISING: (AGREE/DISAGREE)

2019

41%
agree

2020

45%
agree

You believe that the hosts of podcasts you regularly listen to are actual users of the products/services mentioned on their podcasts

% agreeing (‘4’ or ‘5’ on a 5-point scale)

Base: Listen to podcasts for at least 5 hours per week
PODCAST ADVERTISING: (AGREE/DISAGREE)

2019
43%
agree

2020
46%
agree

When price and quality are equal, you prefer to buy products from companies that advertise on or sponsor the podcasts you regularly listen to?

% agreeing (‘4’ or ‘5’ on a 5-point scale)

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
PODCAST ADVERTISING: (AGREE/DISAGREE)

2019

44%

agree

2020

48%

agree

You pay more attention to advertising on podcasts than on other forms of media

% agreeing (‘4’ or ‘5’ on a 5-point scale)

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
PODCAST ADVERTISING: (AGREE/DISAGREE)

2019
60%
agree

2020
64%
agree

You appreciate podcast advertisers for supporting your favorite podcasts

% agreeing (‘4’ or ‘5’ on a 5-point scale)

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
DO YOU CURRENTLY HAVE A PAID SUBSCRIPTION TO:

- Any paid internet-only music streaming service such as Pandora Premium or Spotify: 64%
- Any audiobook service such as Audible: 40%
- SiriusXM Satellite Radio: 36%
- Any of these: 76%

% saying "yes"

Base: Listen to podcasts for at least 5 hours per week
WHICH OF THE FOLLOWING BEST DESCRIBES THE MOST IMPORTANT REASON WHY YOU CURRENTLY HAVE A PAID SUBSCRIPTION TO AN AUDIO LISTENING SERVICE?

For more control over the content you are listening to

For access to content that you can’t get for free elsewhere

To hear fewer ads

2019

43

35

22

2020

43

36

21

Base: Listen to podcasts for at least 5 hours per week
DO YOU CURRENTLY HAVE A PAID SUBSCRIPTION TO:

- Any internet-only television streaming service such as Netflix, Amazon Prime Video, or Hulu: 87%
- Any premium cable channels such as HBO or Showtime: 48%
- Any live TV streaming service such as Sling TV, DirectTV Now, Hulu With Live TV, or YouTube TV: 48%
- Any of these: 92%

Base: Listen to podcasts for at least 5 hours per week
Compared to other places where you might hear advertisements, does hearing an advertisement on a podcast make you...?

<table>
<thead>
<tr>
<th>Year</th>
<th>More Likely to Purchase a Product</th>
<th>No Effect</th>
<th>Less Likely to Purchase a Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>46</td>
<td>49</td>
<td>5</td>
</tr>
<tr>
<td>2020</td>
<td>54</td>
<td>40</td>
<td>6</td>
</tr>
</tbody>
</table>

Base: Listen to podcasts for at least 5 hours per week
PODCAST ADVERTISING: (AGREE/DISAGREE)

2019

37%
agree

Advertising on a podcast is the **best** way for a brand to reach you

% agreeing (‘4’ or ‘5’ on a 5-point scale)

2020

49%
agree

Base: Listen to podcasts for at least 5 hours per week
WHAT IS YOUR OPINION OF PODCASTING ADVERTISING THAT USES...?

- **Personalized discussions about products or sponsors by podcast host(s):**
  - Very favorable: 23
  - Somewhat favorable: 51

- **Messages from advertisers that are read live by podcast host(s):**
  - Very favorable: 22
  - Somewhat favorable: 51

- **Sponsorship messages:**
  - Very favorable: 21
  - Somewhat favorable: 48

- **Pre-recorded ads not read by the host:**
  - Very favorable: 16
  - Somewhat favorable: 36

% saying “very favorable” (5) or “somewhat favorable” (4) on a 5-point scale

Base: Listen to podcasts for at least 5 hours per week
YOU PAY MORE ATTENTION TO [METHOD] THAN OTHER TYPES OF ADVERTISEMENTS ON PODCASTS?

<table>
<thead>
<tr>
<th>Type of Ad</th>
<th>Strongly Agree</th>
<th>% Saying “strongly agree” (5) on a 5-point scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalized discussions</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>about products or sponsors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>by podcast host(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Messages from advertisers</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>that are read live by podcast host(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsorship messages</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Pre-recorded ads not read</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>by the host</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

33% strongly agree with either of these (host-read ads)

Base: Listen to podcasts for at least 5 hours per week
[METHOD] ARE A GOOD FIT FOR PODCASTS

- Personalized discussions about products or sponsors by podcast host(s): 25%
- Messages from advertisers that are read live by podcast host(s): 23%
- Sponsorship messages: 23%
- Pre-recorded ads not read by the host: 17%

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
Companies that use [METHOD] on podcasts understand how to reach people like you.

- Personalized discussions about products or sponsors by podcast host(s): 24%
- Messages from advertisers that are read live by podcast host(s): 23%
- Sponsorship messages: 21%
- Pre-recorded ads not read by the host: 15%

% saying “strongly agree” (5) on a 5-point scale

Base: Listen to podcasts for at least 5 hours per week

Super Listeners Study 2020
KEY FINDINGS

- Super Listeners today listen to even more podcast content than last year, they are getting slightly younger, and slightly more Latino as a proportion
- Last year, 37% of Super Listeners agreed that podcast ads were the best way to reach them. This year that number is 49%
- Although quantity and length of ad breaks has increased, the positive impact of podcast advertising went up year over year