

THE PODCAST CONSUMER 2018







Study Methodology

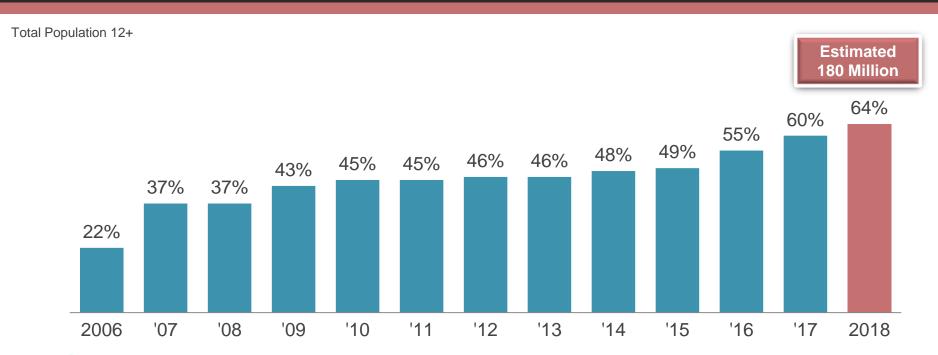
- In January/February 2018, Edison Research conducted a national telephone survey of 2000 Americans ages 12 and older, using random digit dialing techniques to both cell phones and landlines
- Survey offered in both English and Spanish languages
- Data weighted to national 12+ population figures







Awareness of the Term "Podcasting"





% familiar with the term podcasting

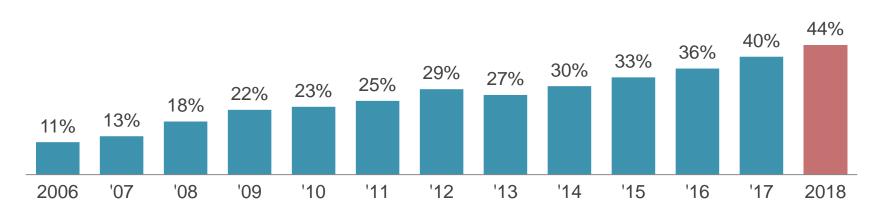




Ever Listened to Podcasts

Total Population 12+

Estimated 124 Million





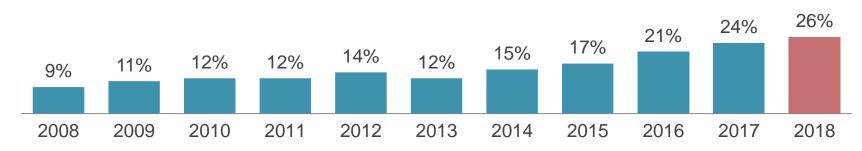




Monthly Podcast Listening

Total Population 12+

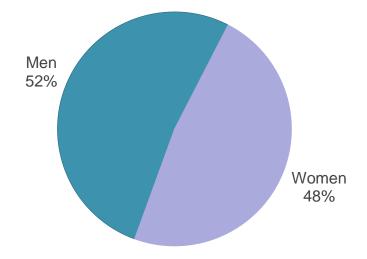
Estimated 73 Million











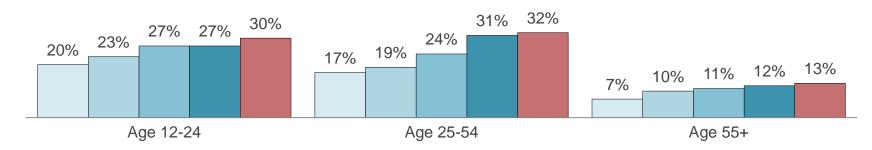






Monthly Podcast Listening

□2014 □2015 □2016 ■2017 ■2018

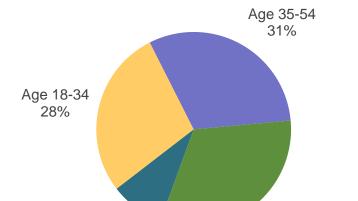








U.S. Population 12+

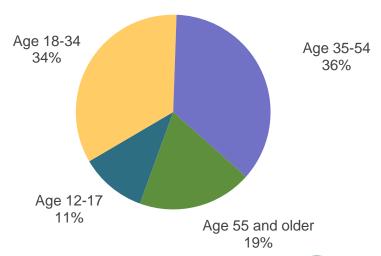


Age 55 and

older

32%

Monthly Podcast Consumers 12+





Age 12-17

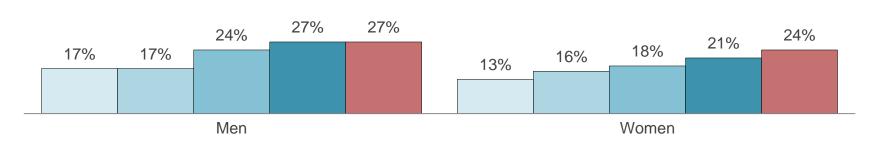
9%





Monthly Podcast Listening



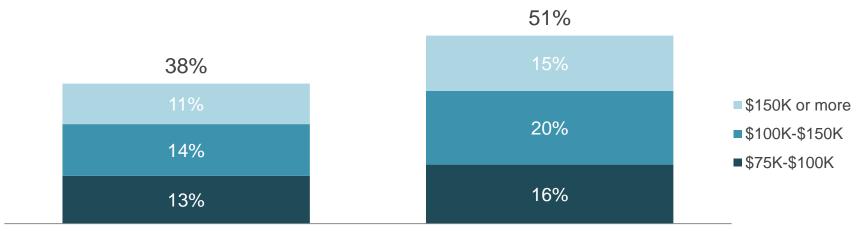








Annual Household Income:





Monthly Podcast Consumers 18+

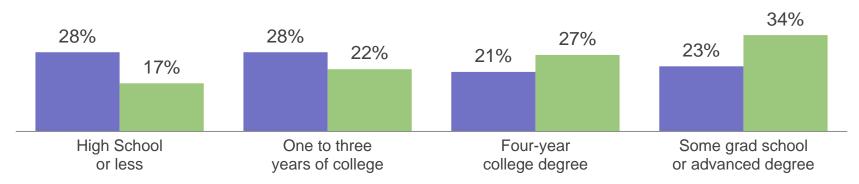






Educational Attainment:

■ U.S. Population 18+

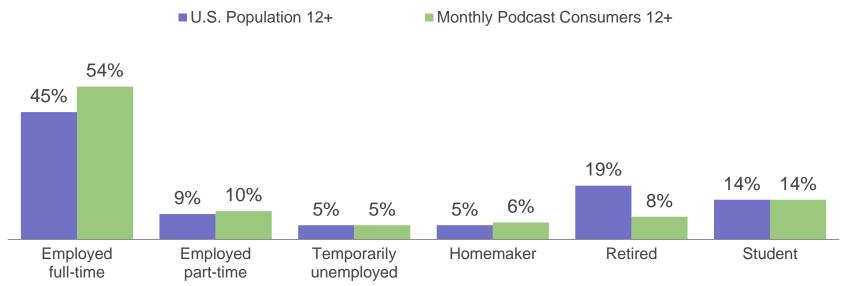








Employment Status:





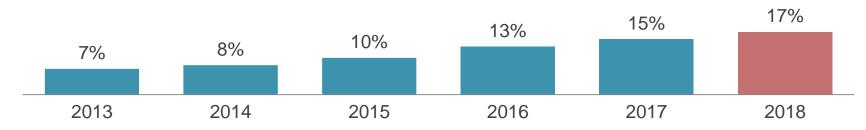




Weekly Podcast Listening

Total Population 12+







% listening to a podcast in last week

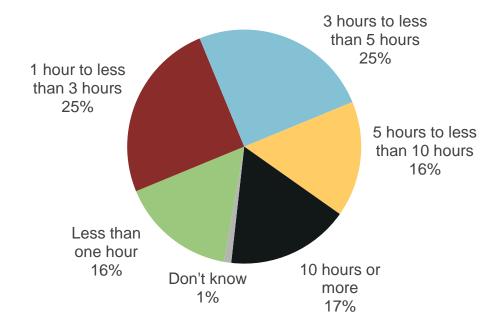




Average Time "Weekly Podcast Listeners" Spend Listening to Podcasts

Weekly Podcast Consumers 12+

Mean: 6 hours 37 minutes



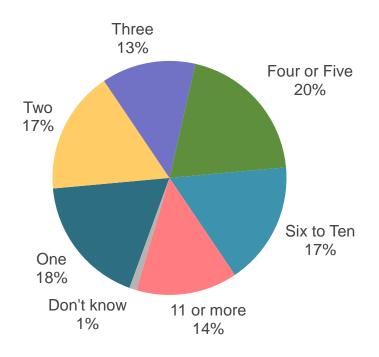






Number of Podcasts <u>Listened to in Last Week</u>

Weekly Podcast Consumers 12+



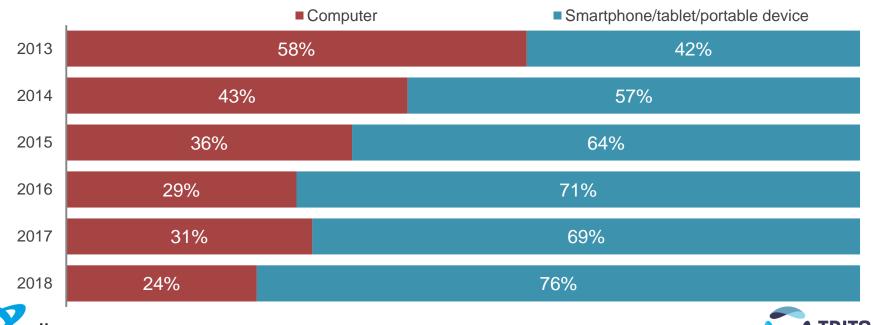
Average of seven podcasts listened per week







Device Monthly Podcast Consumers Use Most Often to Listen to Podcasts

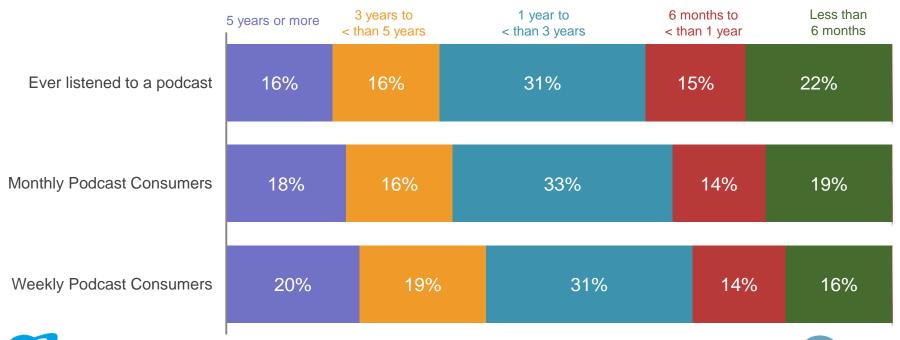






Years Listening to Podcasts

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



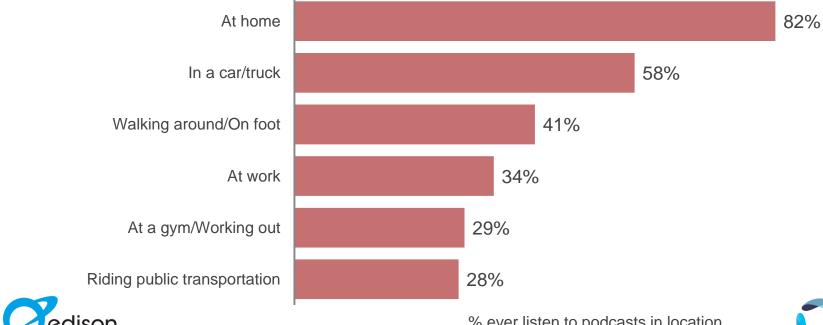






Podcast Listening Locations

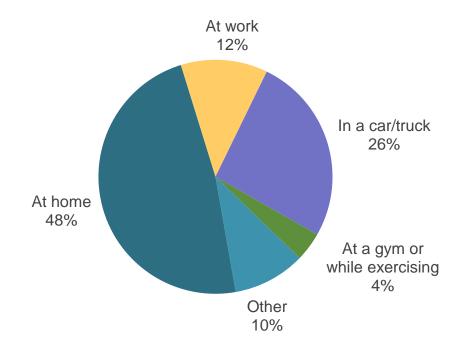
"Have you ever listened to a podcast...?"







Where are Podcasts Most Often Listened to?

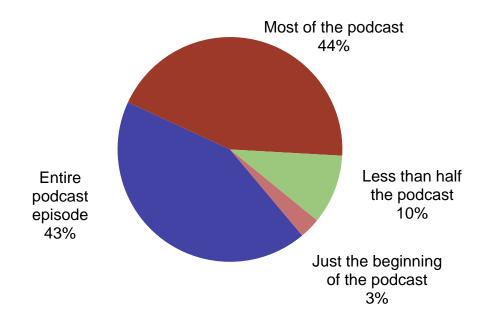








Amount of Podcast Episode Listened to



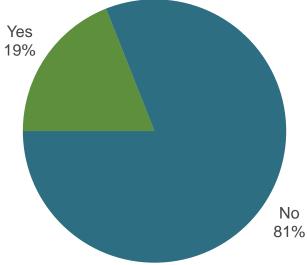






Increasing Podcast Playback Speed

"Do you ever increase the speed of your podcasts in order to listen to them faster?"

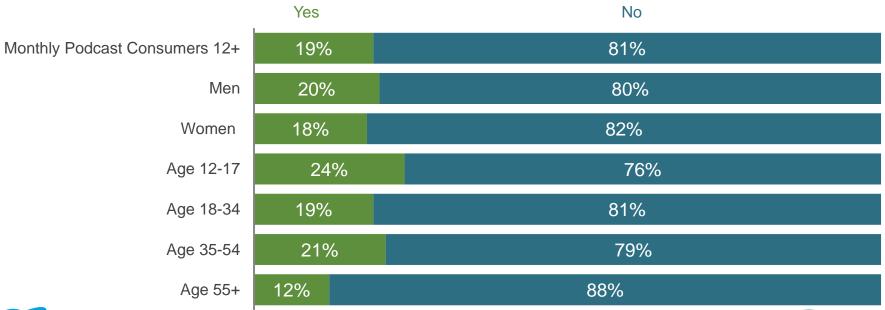








Increasing Podcast Playback Speed

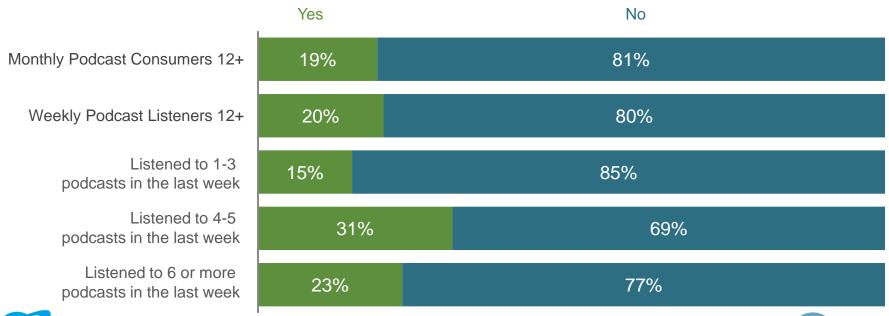




TRITON



Increasing Podcast Playback Speed

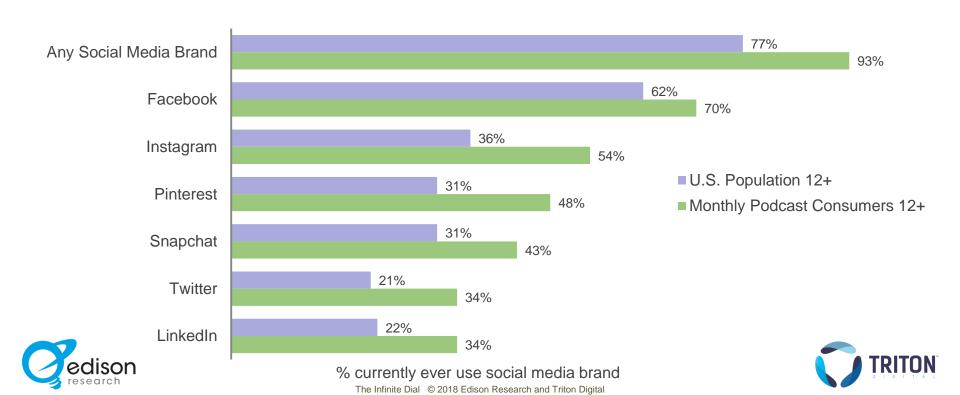




TRITON

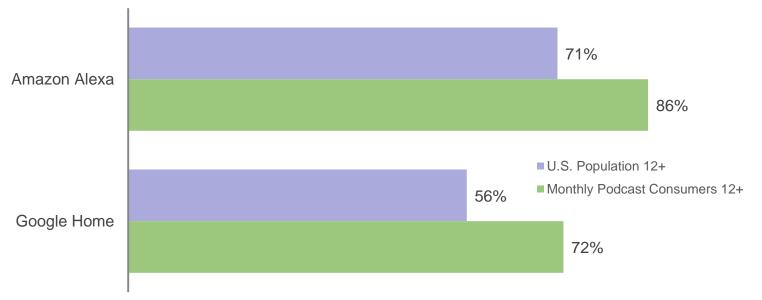


Social Media Brand Usage





Smart Speaker Awareness

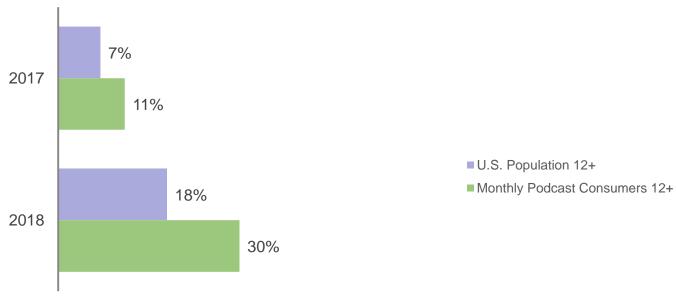




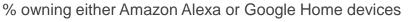




Smart Speaker Ownership











Smart Speaker Ownership















Methodology

1,620 via online survey

- 800 Smart Speaker owners
- 820 Non-owners
- Adults 18+
- Data weighted to Smart Speaker owner estimates from Infinite Dial 2017

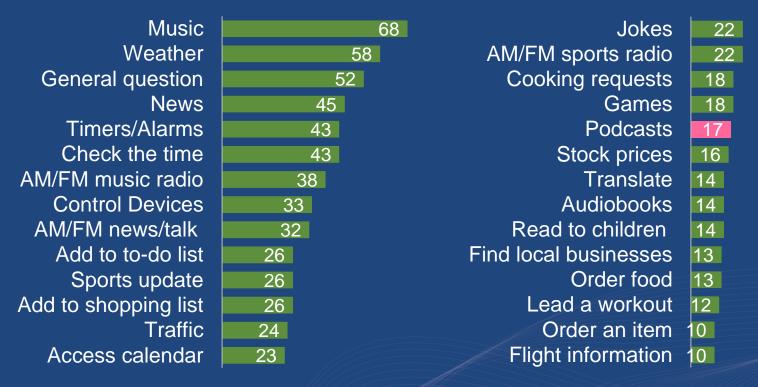
15 in-home interviews with Smart Speaker owners







% using Smart Speaker regularly for the following:



Base: Smart Speaker owners







% using Smart Speaker regularly for the following:

Podcast Listeners



Base: Smart Speaker owners







Share of Ear®

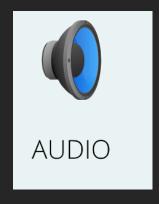
Americans' Share of Time Spent Listening to Audio Sources:



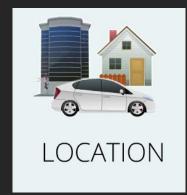
Share of Ear®

- 5,538 respondents
 - Completed 24-hour audio listening diary
- National sample 13+
- Online and offline
- Offered in English and Spanish
- Quarterly data collection and updates

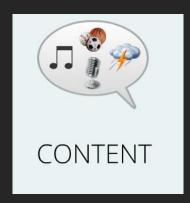
Share of Ear®



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



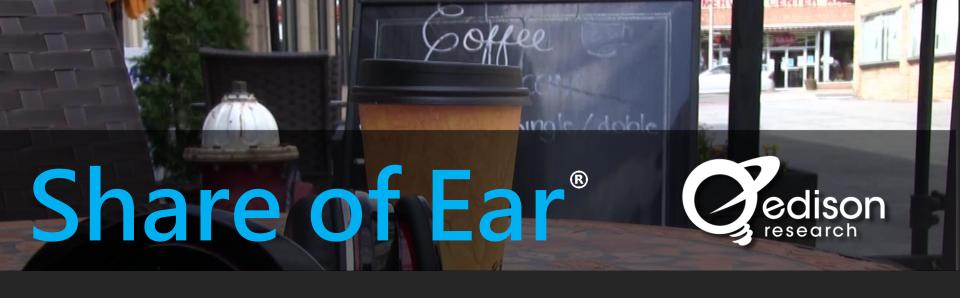
Home Work Car/Truck Somewhere else



Music News Talk/Personalities Sports



AM/FM Radio
Computer
Mobile Device
TV Audio Channels
SiriusXM Receiver
Internet-connected TV device
Wireless streaming speakers
Smart Speakers



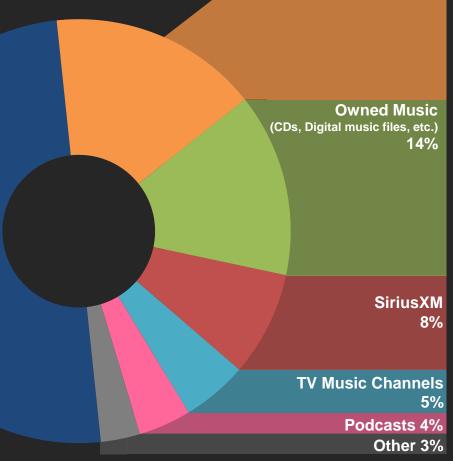
Over 5,000 one-day audio diaries completed through Q1 2018



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

Americans' 13+ Share of Time Spent Listening to Audio Sources

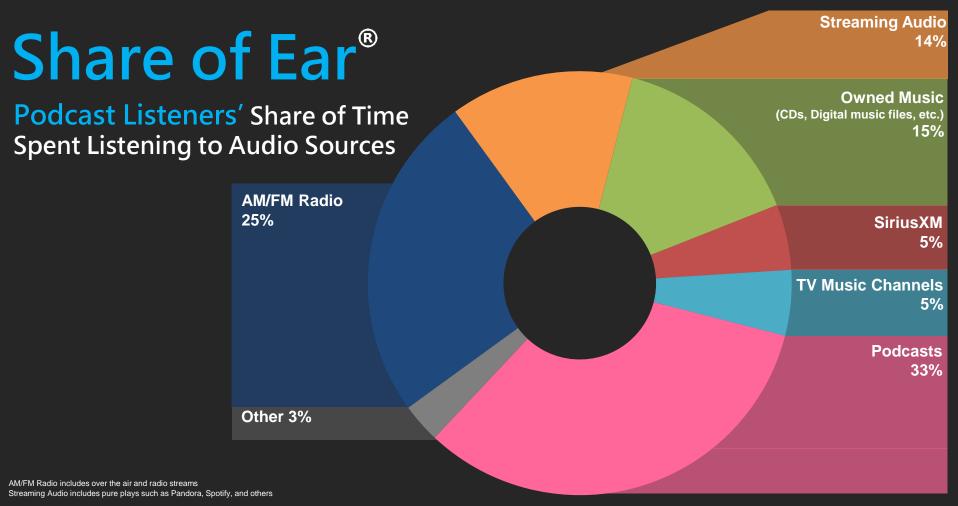




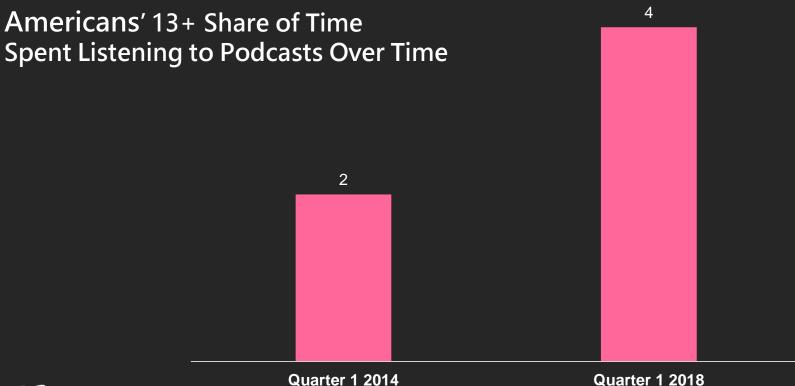
Streaming Audio

16%

AM/FM Radio includes over the air and radio streams
Streaming Audio includes pure plays such as Pandora, Spotify, and others



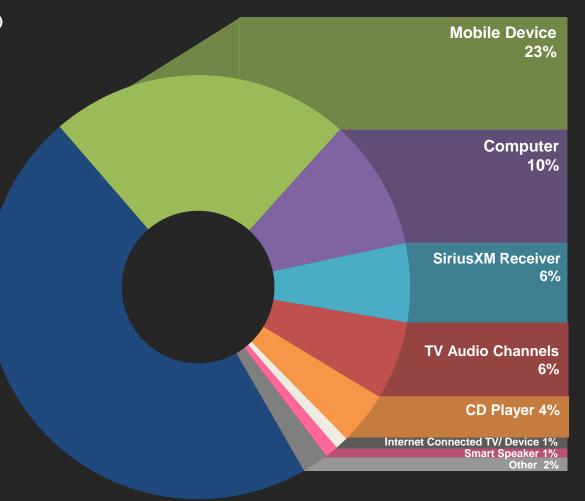
Source: Edison Research. Podcast Listeners (defined as those who reported listening to a podcast in the last 24 hours) spend an average of 5 hours and 50 minutes each day consuming audio. This graph represents the share of time Podcast Listeners spent with each audio source. Based on a nationally representative sample of 5,538 Americans ages 13+ who completed a 24-hour audio listening diary. Contact info@edisonresearch.com





Americans' 13+ Audio Listening by Device

AM/FM Radio Receiver 47%





Americans' 13+ Audio Listening by Device



Mobile Device



Podcast Listeners' 13+ **Audio Listening by Device**

> **Mobile Device** 44%



Computer

20%





Americans' 13+ Share of Time Spent Listening to Audio Sources on a Smartphone



Owned Music

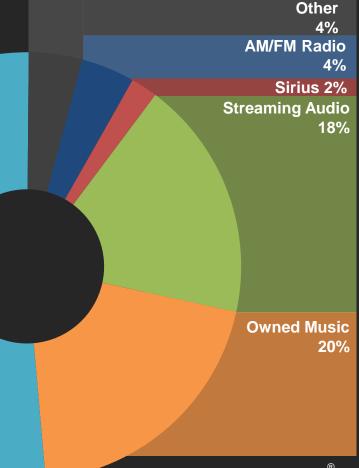
33%

Podcasts



Podcast Listeners' 13+ Share of Time Spent Listening to Audio Sources on a Smartphone

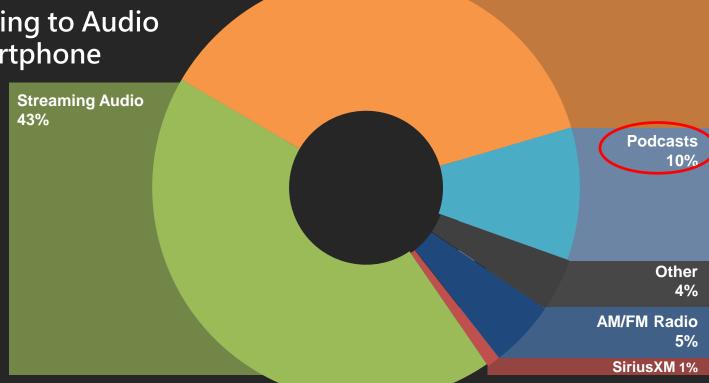
Podcasts 52%





Edison Research Share of Ear®

Americans' 13-34 Share of Time Spent Listening to Audio Sources on a Smartphone



Owned Music

37%



The Podcast Consumer - Summary

 Podcasting's Share of Ear has doubled in 4 years - a significant shift.

 In-car listening is growing, and represents a major potential source of new listening.



The Podcast Consumer - Summary

 Nearly four in ten Americans 12+ are familiar with the term podcasting but are not regular listeners.
 Finding out why is imperative.

There is tremendous opportunity to grow with persons 55+.



The Podcast Consumer - Summary

 Podcast producers need to make it easy for consumers to access their content on smart speakers.





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