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# THE PODCAST DOWNLOAD

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FALL 2017 REPORT

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# Background



From highly personalized niche programs to brand extensions from major media networks, podcasting is where millions of media consumers are turning to for information, entertainment, and connection to the world. In fact, **one out of four Americans has listened to a podcast in the past month**, according to Edison Research's annual Infinite Dial study.

Advertisers are taking notice of this substantial audience, as **more than two-thirds of advertising media decision makers have discussed advertising in podcasts**, according to a study from Advertiser Perceptions. Yet, very little research has been done on the advertising environment within podcasts, including best practices for increasing listener engagement and brand impact.

In partnership with the Internet Advertising Bureau's 2017 Podcast Upfront, Westwood One commissioned a study of weekly podcast listeners and their perceptions about the advertisements that they hear within podcasts. This study was created in conjunction with Maru/Matchbox and Vision Critical, a nationally recognized leader in consumer research

This study was fielded online using a nationally representative sample of 600 respondents who met the following criteria:

- Adults over the age of 18
- All respondents listened to at least one podcast within the past week
- Respondents were not employed in the advertising, public relations, marketing, market research, radio, television, digital, or podcasting industries
- Surveys were conducted between July 27, 2017 and August 1, 2017.

# Key findings



- Podcast listeners are **voracious audio users and media junkies**. Heavy podcast listeners spend more time than average with AM/FM radio, TV, and streaming video on-demand.
- Podcast listeners say **they listen to more podcasts than they download** in a given week.
- Podcast listeners will **accept between two and four ads per podcast**, depending on the podcast's length. Heavy podcast listeners are willing to hear more ads.
- Millennials have **similar ad tolerance and receptivity** to overall podcast listeners.
- **Podcast listeners prefer** multiple ad breaks for 60-minute podcasts. For shorter podcasts, listeners prefer just one break.
- Half of podcast listeners would consider a \$5 **monthly ad-free subscription** to their favorite podcast.
- **Podcast listeners prefer** ads voiced by the show's host over traditional ads, yet heavy podcast listeners are more accepting of pre-produced ads.
- Nearly half of podcast listeners have tried **speed listening** to podcasts at twice the speed of the original podcast. Ads get sped up more than the content of the show.

# Advertiser consideration and usage of podcast advertising soars

Westwood One State of Podcasting Report 2017 Findings	Sept 2015	July 2016	May 2017
Have you and your colleagues discussed podcast advertising for potential media investment?	<b>41%</b>	<b>58%</b>	<b>68%</b>
How likely are you to consider advertising in podcasts in the next six months?	<b>18%</b>	<b>27%</b>	<b>37%</b>
How likely are you to actually advertise in podcasts in the coming six months?	<b>10%</b>	<b>21%</b>	<b>27%</b>
Do you currently advertise in podcasts?	<b>15%</b>	<b>21%</b>	<b>29%</b>



# This study focuses on frequent podcast listeners

Edison Infinite Dial 2017- adults 12+

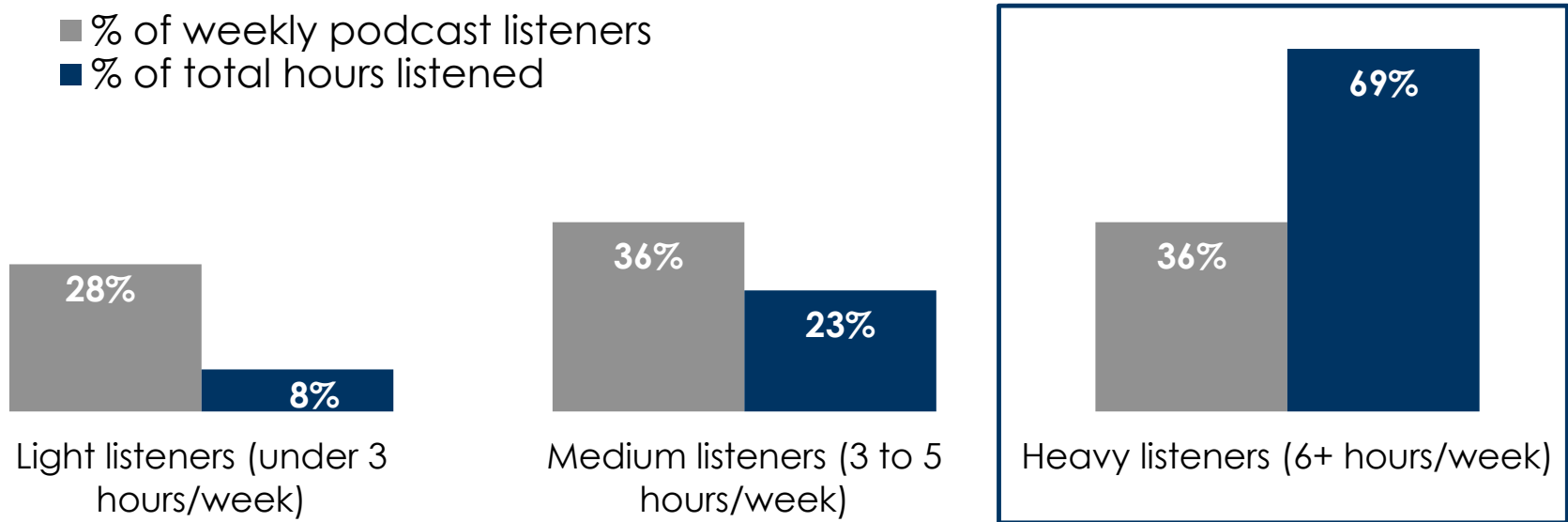


Heavy podcast listeners represent **5%** of America

# Most podcast usage is driven by heavy listeners

% composition by hours spent, total adults 18+

- % of weekly podcast listeners
- % of total hours listened



**How to read:** Heavy listeners to podcasts (those who listen 6 or more hours per week) account for 36% of all weekly podcast listeners, while generating 69% of all podcast time spent.

# Heavy podcast listeners tend to be younger, male, and upscale

Audience composition (% of adults 18+) by hours spent

	Age	
	Total podcast Listeners	Heavy podcast listeners
Millennials (Adults 18-34)	52%	<b>59%</b>
Gen X (Adults 35-49)	32%	<b>33%</b>
Boomers (Adults 50-64)	13%	<b>8%</b>
Seniors (Adults 65+)	3%	<b>0%</b>

	Gender	
	Total podcast Listeners	Heavy podcast listeners
Men	55%	<b>68%</b>
Women	45%	<b>32%</b>

	Income	
	Total podcast Listeners	Heavy podcast listeners
Under \$50K	20%	<b>12%</b>
\$50K-\$75K	22%	<b>18%</b>
\$75K-\$100K	22%	<b>27%</b>
\$100K+	35%	<b>42%</b>

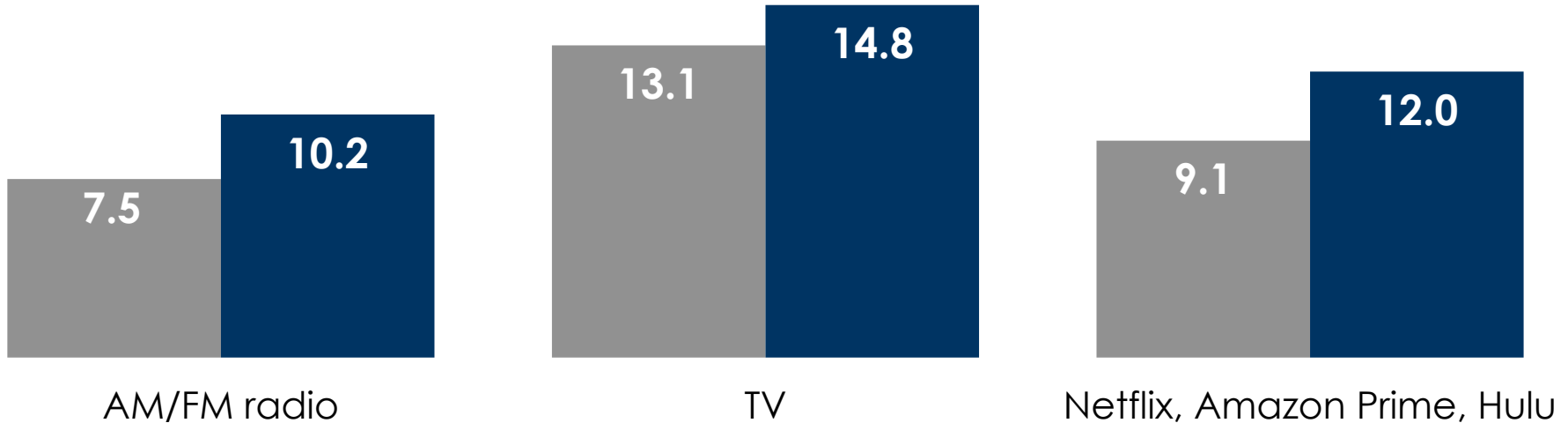
	Ethnicity	
	Total podcast Listeners	Heavy podcast listeners
White (non-Hispanic)	63%	<b>71%</b>
Hispanic	17%	<b>15%</b>
African-American	10%	<b>8%</b>
Asian/Other	10%	<b>6%</b>

**How to read:** 68% of heavy podcast listeners are men.

# Heavy podcast listeners are heavy users of media

Average time spent with media platform (hours per week) among podcast listeners

- Total podcast listeners —average time spent
- Heavy podcast listeners —average time spent

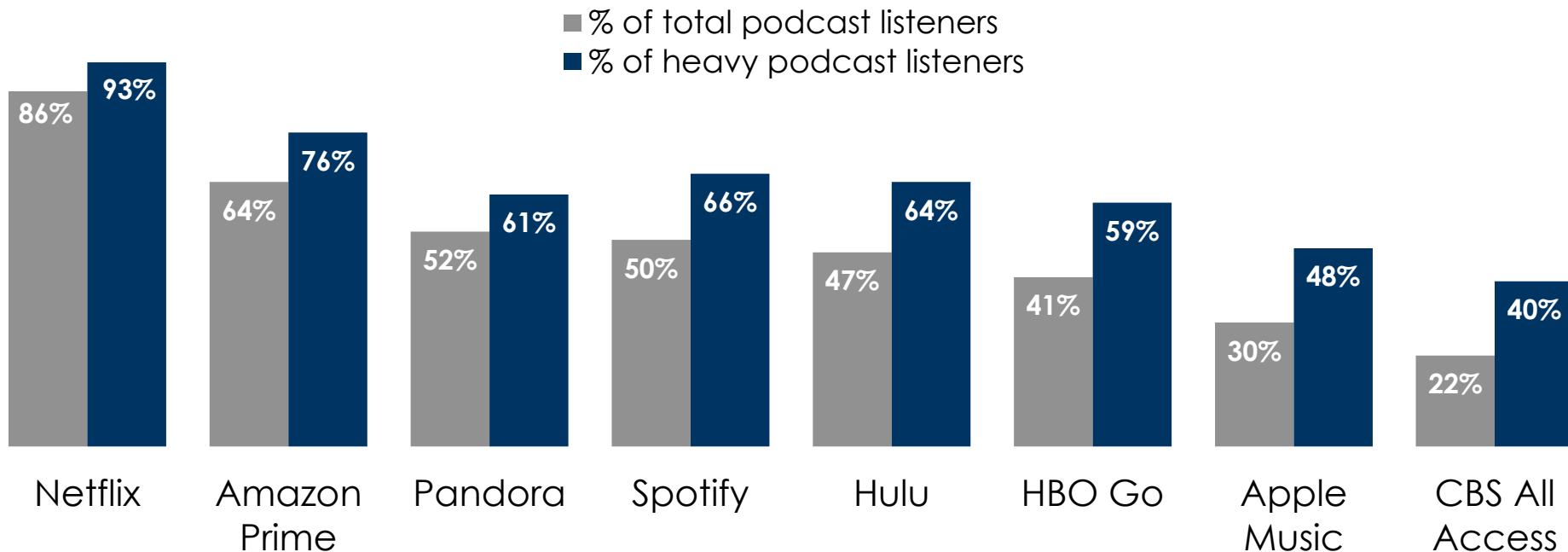


**How to read:** On average, heavy podcast listeners spend 10.2 hours per week listening to AM/FM radio.



# Heavy podcast listeners are big users of streaming entertainment platforms

Streaming entertainment platforms used by podcast listeners

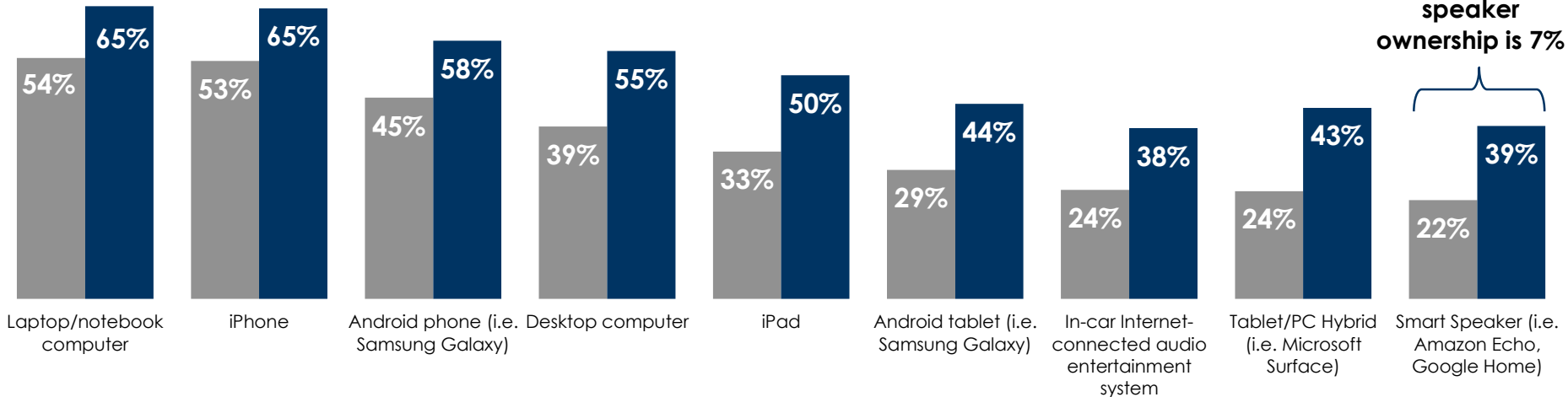


**How to read:** 93% of heavy podcast listeners use Netflix on a regular basis.

# Heavy podcast listeners are tech early adopters

## Devices used to listen to podcasts

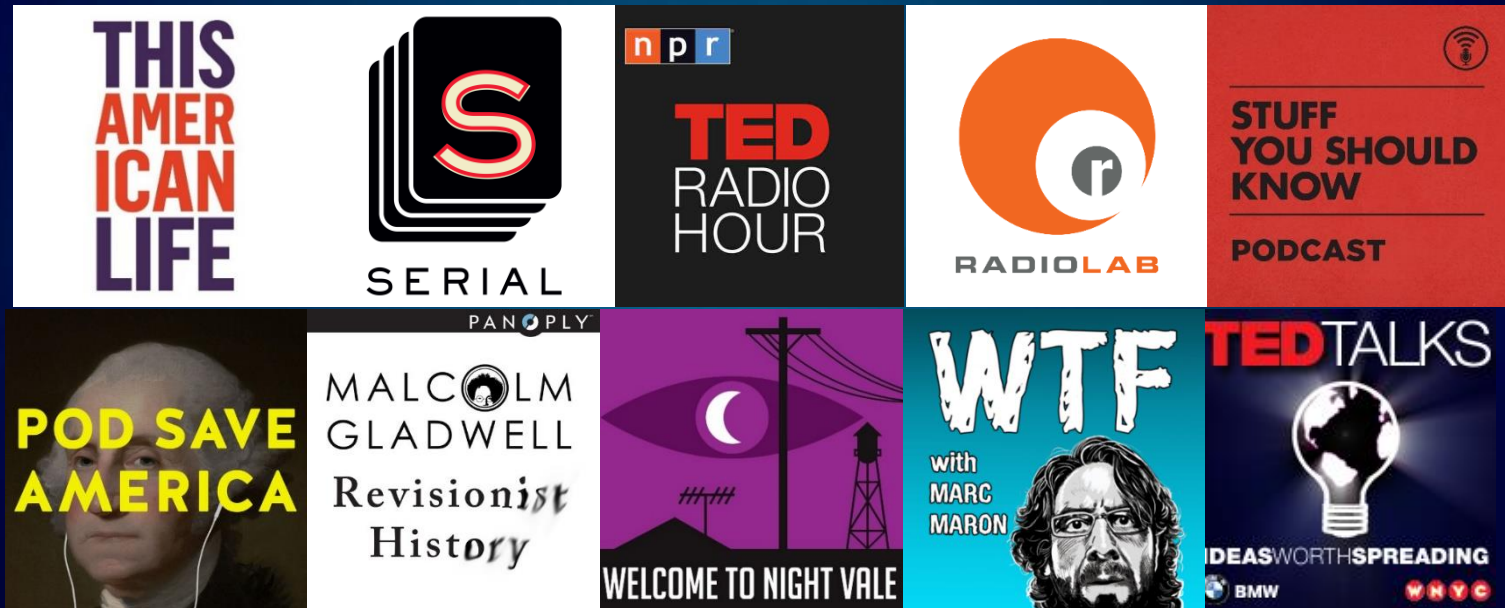
- % of total podcast listeners
- % of heavy podcast listeners



**How to read:** 65% of heavy podcast listeners listen to podcasts on a laptop or notebook computer.

# Podcast listeners recall popular shows

Top 10 podcast shows by number of unaided mentions



# Podcast content preference varies by demographic

% of podcast listeners who regularly listen to each podcast type

	Total	Millennials (A18-34)	Gen X (A35-49)	Boomers (A50-64)	Men	Women
News/Current Events	56%	53%	58%	62%	60%	51%
Comedy	51%	60%	46%	33%	54%	46%
Entertainment/Pop Culture	47%	57%	47%	21%	47%	48%
Music	43%	46%	47%	28%	50%	36%
Storytelling/Drama (i.e. Serial, Crimetown)	43%	53%	35%	25%	38%	48%
Sports	40%	44%	43%	26%	59%	18%
Technology	39%	43%	40%	24%	52%	24%
Education	36%	43%	33%	25%	38%	34%
Health/Fitness	36%	38%	36%	29%	37%	34%
Business	31%	34%	27%	36%	41%	20%
Kids/Family	21%	26%	21%	11%	27%	15%
<b>Average</b>	40%	45%	39%	29%	46%	34%

**How to read:** 60% of Millennials (Adults 18-34) regularly listen to comedy podcasts.

# Podcast fans listen to more podcasts than they download

Average number of podcasts consumed, past week (by demographic)

	Total	Millennials (A18-34)	Gen X (A35-49)	Boomers (A50-64)	Men	Women	Heavy podcast listeners
Podcasts listened to (past week)	5.6	6.1	5.3	5.0	6.9	4.1	9.6
Podcasts downloaded (past week)	4.5	5.1	4.1	3.5	5.5	3.2	7.8

**How to read:** Millennials (adults 18-34) who are podcast listeners listen to an average of 6.1 podcasts per week, while downloading an average of 5.1 podcasts per week.

# Word of mouth and social media drive new podcast discovery

Methods of podcast discovery (by demographic)

	Total	Millennials (A18-34)	Gen X (A35-49)	Boomers (A50-64)	Men	Women	Heavy podcast listeners
Word of mouth (recommendations from friends/acquaintances)	65%	70%	63%	59%	64%	67%	69%
Social media	59%	66%	55%	51%	63%	55%	71%
From other podcasts	53%	58%	49%	42%	57%	47%	62%
Podcast apps/software platforms (i.e. iTunes Genius)	42%	46%	45%	22%	50%	32%	62%
A favorite radio or TV program	40%	43%	38%	32%	47%	32%	56%

**How to read:** 65% of podcast listeners learn about new podcasts via word of mouth.

# Podcast ad actions taken comparable to AM/FM radio

## Actions taken after hearing a product advertised – podcasts vs. AM/FM radio

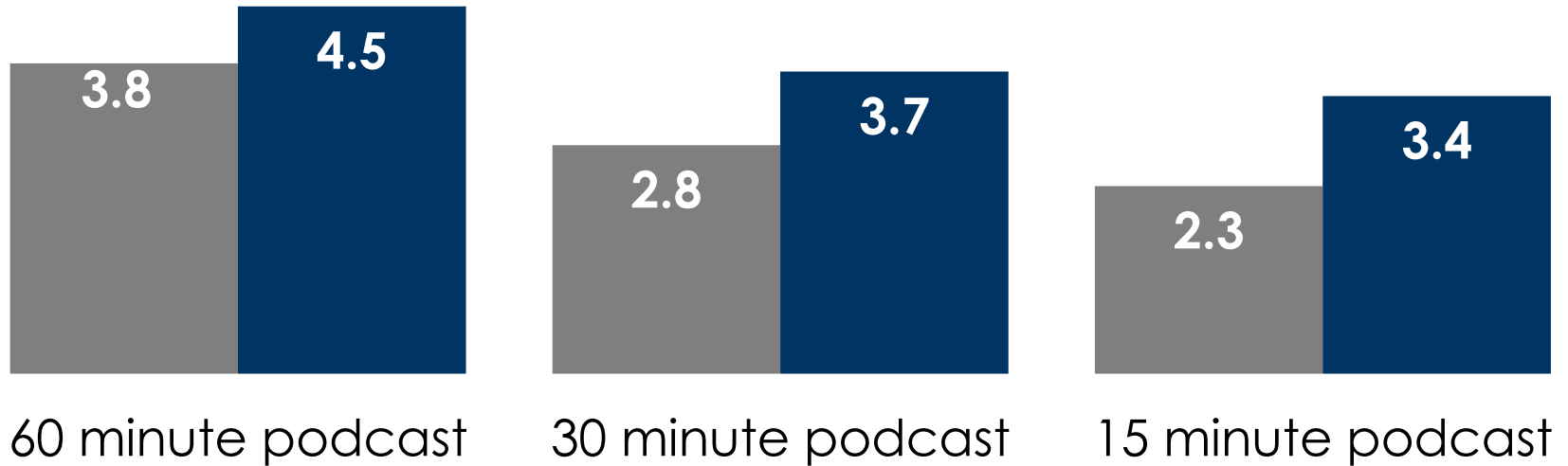
	Podcast ads	AM/FM radio ads
Searched online for more information about the product or service	66%	65%
Talked to my friends/acquaintances about the product or service	51%	51%
Followed the product or service on social media	38%	38%
Purchased the product/service at a store or online	37%	34%
Used a promotional code from the podcast at checkout when purchasing the product or service	36%	31%

**How to read:** 66% of all podcast listeners have searched online for more information about a product or service that they have heard advertised during a podcast.

# Podcast listeners are comfortable hearing more ads

Accepted ad occasions per podcast (by podcast length)

■ Total podcast listeners ■ Heavy podcast listeners



**How to read:** For a 60 minute podcast, podcast listeners would consider an average of 3.8 ads per podcast to be appropriate.



# Millennials' tolerance for ads mirrors the overall podcast audience; women are less tolerant

Accepted ad occasions per podcast (by demographic)

Length of podcast	Total	Millennials (A18-34)	Gen X (A35-49)	Boomers (A50-64)	Men	Women
60 minutes	3.8	3.7	4.1	3.8	4.0	3.6
30 minutes	2.8	2.8	2.9	2.4	3.0	2.4
15 minutes	2.3	2.5	2.3	1.7	2.6	2.0

**How to read:** For a 60 minute podcast, Millennials (adults 18-34) who are podcast listeners would consider an average of 3.7 ads per podcast to be appropriate.

# Millennials and Gen X podcast listeners are receptive to podcast ads; heavy podcast listeners love the ads

% of podcast listeners who answered “strongly agree” or “somewhat agree” to each statement (by demographic)

	Total	Heavy podcast listeners	Millennials (A18-34)	Gen X (A35-49)	Boomers (A50-64)	Men	Women
I wouldn't mind a couple of extra ads per show so that my favorite podcasts can continue	65%	70%	68%	64%	62%	67%	63%
Most of the ads that I hear on podcasts are engaging	47%	61%	51%	49%	29%	53%	39%
Most of the ads that I hear on podcasts are relevant to me	45%	60%	50%	48%	29%	55%	34%
Most of the ads that I hear on podcasts are memorable	45%	62%	49%	45%	33%	51%	37%
I like most of the ads that I hear on podcasts	44%	61%	46%	47%	36%	53%	34%
I go out of my way to support brands that advertise on my favorite podcasts	40%	54%	42%	44%	32%	47%	32%

**How to read:** 51% of Millennials (adults 18-34) who are podcast listeners agree with the following statement: “Most of the ads that I hear on podcasts are engaging.”

# Listeners prefer one break for shorter podcasts, multiple breaks for longer ones

Preferred number of ad breaks by podcast length/number of ads

	60 minute podcast with 6 ads	30 minute podcast with 3 ads	15 minute podcast with 3 ads
One break	25%	46%	64%
Two breaks	34%	31%	19%
Three or more breaks	39%	19%	11%

**How to read:** 64% of all podcast listeners would prefer to hear all three ads within a 15 minute podcast in one break.

# Pre-roll ads are not considered an irritant

% of podcast listeners who answered “strongly agree” or “somewhat agree” to each statement concerning pre-roll ads (by demographic)

	Total	Millennials (A18-34)	Gen X (A35-49)	Boomers (A50-64)	Men	Women	Heavy podcast listeners
It doesn't bother me - I know that the podcast will start right after the commercial	71%	74%	69%	68%	62%	72%	70%
I would rather have the ad run in the show and just begin the podcast	48%	48%	48%	45%	48%	54%	40%

**How to read:** 71% of podcast listeners agree with the following statement regarding pre-roll ads: “It doesn't bother me - I know that the podcast will start right after the commercial.”

# Podcast listeners are open to ad free paid subscription

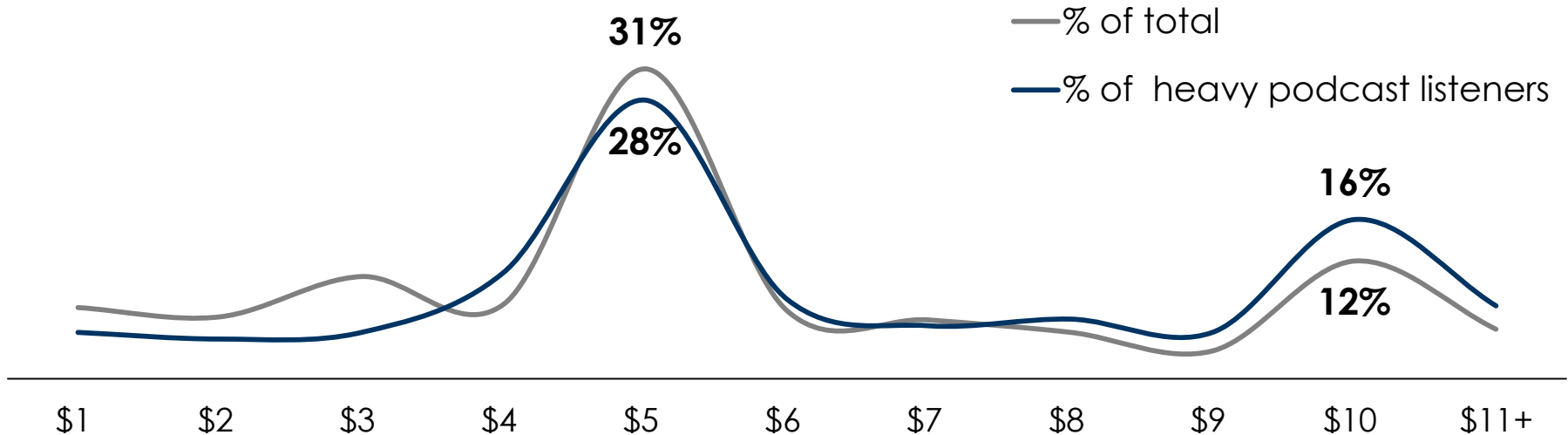
% of podcast listeners by likelihood to consider an ad free, subscription option for their favorite podcasts (by demographic)

	Total	Millennials (A18-34)	Gen X (A35-49)	Boomers (A50-64)	Men	Women	Heavy podcast listeners
Very/somewhat likely	53%	61%	55%	22%	61%	42%	68%
Very/somewhat unlikely	31%	26%	29%	47%	23%	41%	20%

**How to read:** 53% of podcast listeners would be likely to consider a paid subscription to their favorite podcast.

# Subscription-friendly listeners would consider paying \$5.78 per month; heavy podcast listeners would pay more (\$6.59)

Amount listeners would be willing to pay for their favorite podcasts  
(Among those likely to consider a subscription option)



**How to read:** Of podcast listeners who would consider a subscription option, 31% would be willing to pay \$5 per month.

# Podcast listeners prefer host voiced ads versus pre-produced ads; heavy podcast listeners more accepting of pre-produced ads

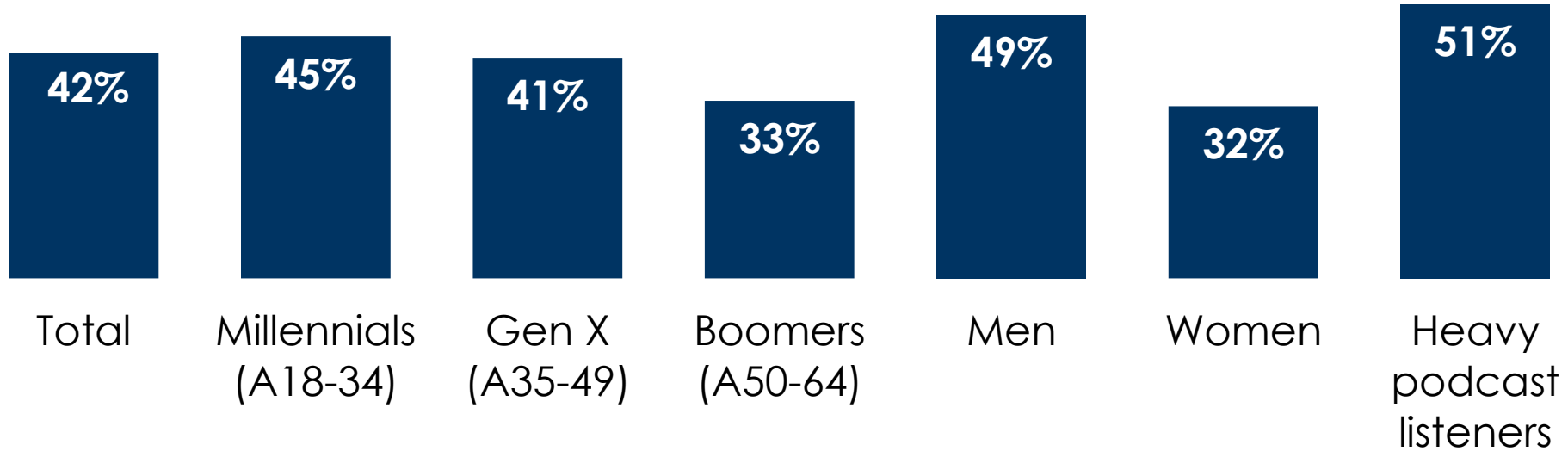
% of podcast listeners by ad creative preference

	Total	Millennials (A18-34)	Gen X (A35-49)	Boomers (A50-64)	Men	Women	Heavy podcast listeners
An ad voiced by the show's host	55%	61%	51%	47%	52%	59%	49%
An ad that sounds like one heard on AM/FM radio	30%	29%	31%	30%	34%	26%	37%
Don't know/no opinion	15%	10%	18%	22%	15%	14%	14%

**How to read:** Given a choice, 55% of podcast listeners would prefer to hear an ad voiced by the show's host versus an ad that sounds like one heard on AM/FM radio.

# Podcast listeners have tried speed listening

% of podcast listeners who have ever increased the speed of a podcast

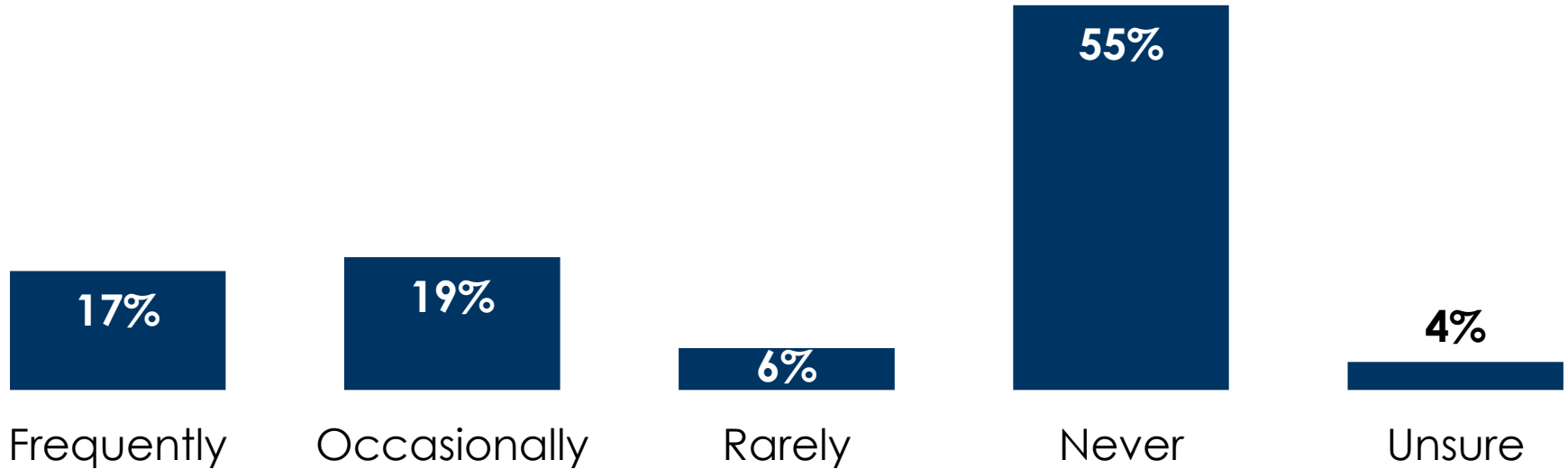


**How to read:** 42% of podcast listeners have increased the speed of a podcast.



# Most podcast listeners are not frequent speed listeners

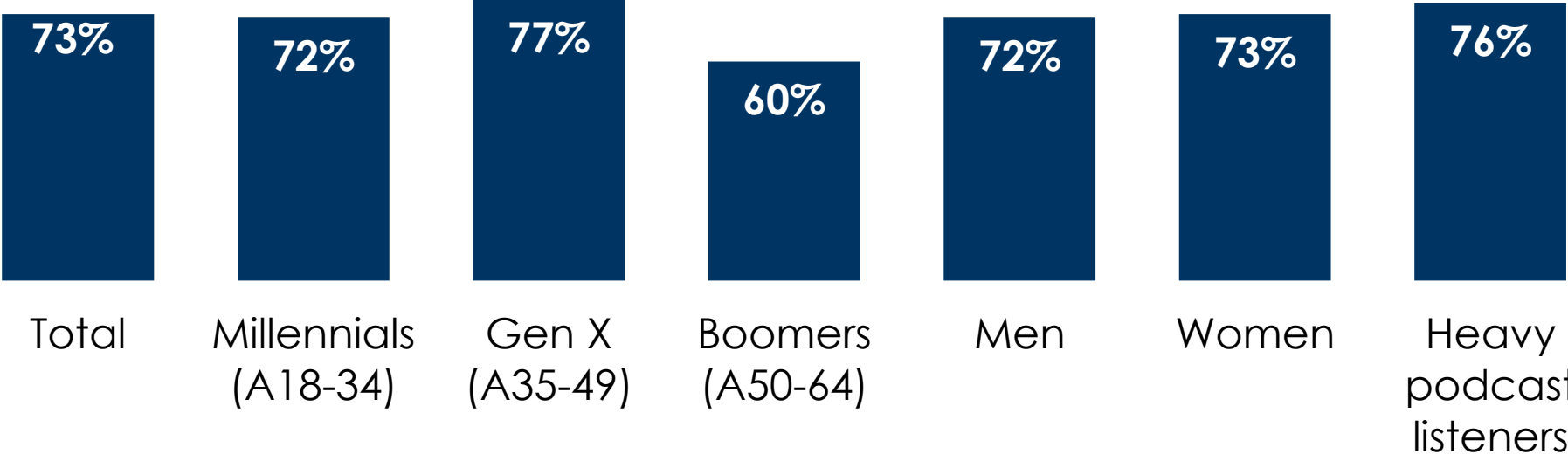
Frequency of speed listening – among all podcast listeners



**How to read:** 17% of podcast listeners frequently increase the speed of podcasts.

# Most speed listeners have increased the speed of ads within a podcast

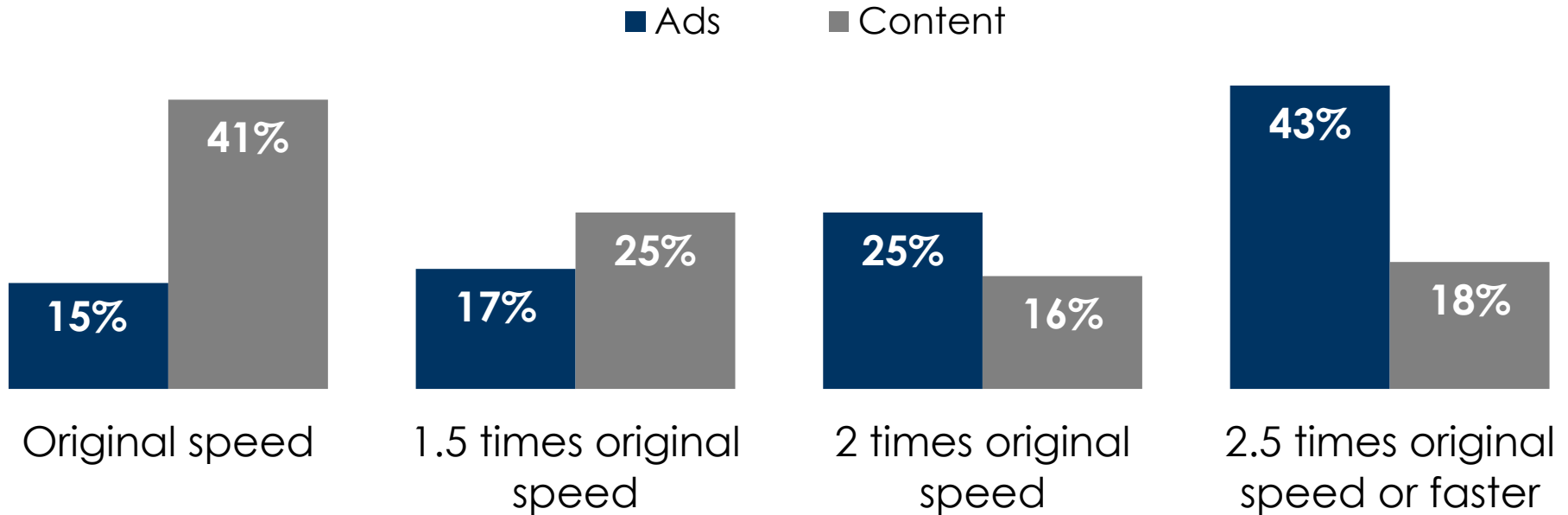
% of "speed listeners" who have ever increased the speed of ads within a podcast



**How to read:** 73% of podcast "speed listeners" have increased the speed of ads within a podcast.

# Ads tend to get sped up more than content

Speed among those who ever tried podcast speed listening



**How to read:** 43% of speed listeners have increased the speed of ads within a podcast by 2.5 times or faster.

# Conclusions



- **Podcast has an opportunity to add more commercial breaks and ad units:** The more people listen, the more welcoming they are of podcast advertising. Heavy listeners say they can accept more ad breaks and more ads. The longer the podcast, the more accepting listeners are to multiple ad breaks. 39% say a 60 minute show with 6 ads could have three or more ad breaks.
- **Heavy podcast consumers are more accepting of pre produced ads:** While overall weekly podcast listeners prefer host voice reads, heavy podcast listeners are more accepting of pre-produced ads.
- **There is an opportunity for a ad free, paid podcast subscription model:** Half of weekly podcast listeners and nearly 70% of heavy podcast listeners are open to the concept. \$5 a month among weekly listeners and \$6 among heavy podcast listeners is the average price accepted.
- **More listens than downloads?** Interestingly, weekly podcast listeners say they listen to 24% more podcasts than they download (5.6 listens for 4.5 downloads). Heavy podcast listeners say they listen to 9.6 podcasts a week, and download 7.8 a week. This flies in the face of the notion that consumers download far more than they listen to. We do have to consider that we have examined the most habitual and frequent podcast listeners.

# Conclusions continued



- **Heavy podcast listeners are voracious media and tech junkies:** At 36% of podcast listeners, heavy podcast listeners represent 69% of weekly hours listened are far more likely to use new tech platforms like Amazon Alexa and Google home and are **voracious** consumers of streaming video (IE: Netflix, Hulu) heavy users of AM/FM and consume more TV than the average weekly podcast listener. Overall, podcast consumers are super audio consumers spending 47% more time with audio daily per Edison's Share of Ear. Heavy podcast consumers love media and want more of it.
- **Speed listening is a red flag for advertisers:** 42% of weekly podcast listeners say they have increased the speed of the podcast. Half of heavy podcast listeners have speed listened. Of those that "speed listen", ads are run faster than the non ad content. TiVo style "ad zipping" has become a reality for podcasting. Should ads be read slower to be more understandable at higher speeds?



# Thank You

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