



# Westwood One State of Podcasting Q1 2018

# Research partners



Edison Research is the leading authority on consumer use and adoption of new audio technology. For the last 20 years, Edison's "Infinite Dial" study has tracked usage of streaming, podcasting, and new audio platforms. Twice a year, Edison's "Share of Ear" study provides the definitive view of American time spent and usage of audio content. The data in this report is based on Edison's Q4 2017 "Share of Ear" which represents Q2 2017 and Q4 2017.



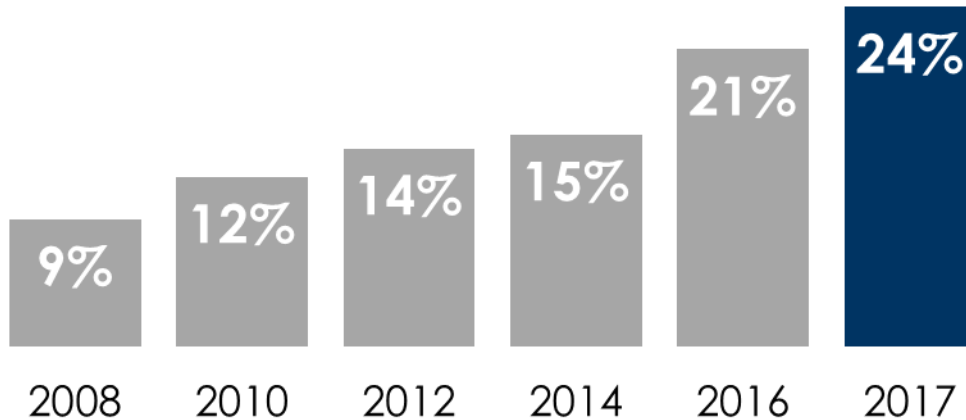
IPSOS is a leading media and marketing research company. IPSOS conducted a national consumer study on podcast advertising awareness and recall during August 2015.



Advertiser Perceptions is the gold standard of advertiser and media agency sentiment. Advertiser Perceptions conducted a series of studies on podcast advertising consideration and intended use among brands and media agencies during September 2015, July 2016 and May 2017.

# Podcast listening is on the rise

% persons 12+ who have listened to a podcast in the last month



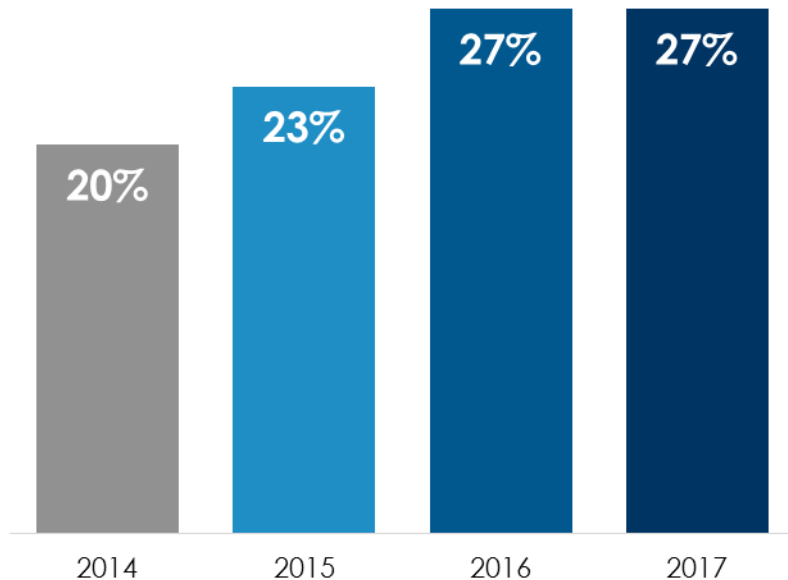
1 in 4   
Americans

have listened to a  
podcast in the last month

# Persons 25-54 sees highest podcasting growth

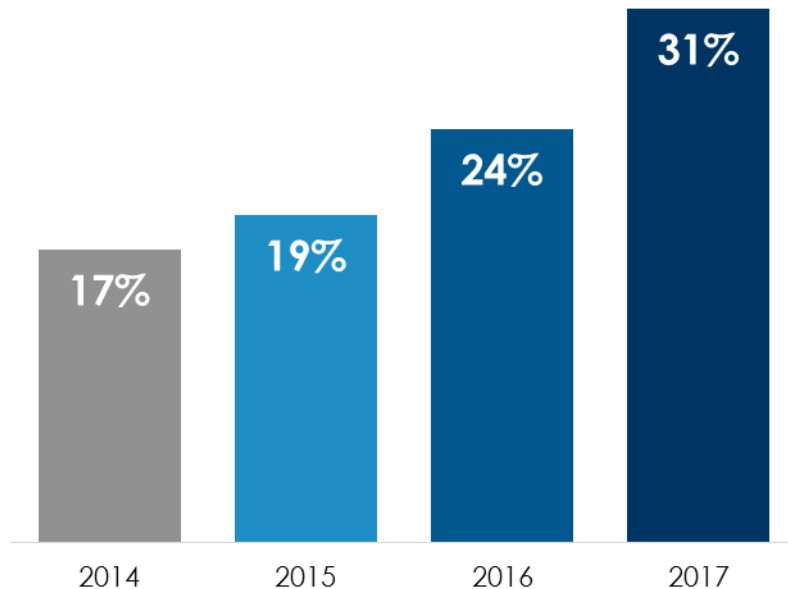
% of persons 12-24 listening to podcasts in last month

35% growth since 2014

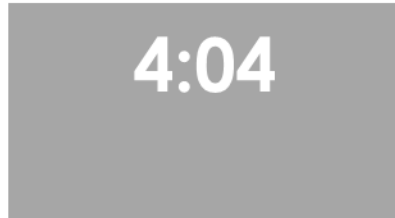


% of persons 25-54 listening to podcasts in last month

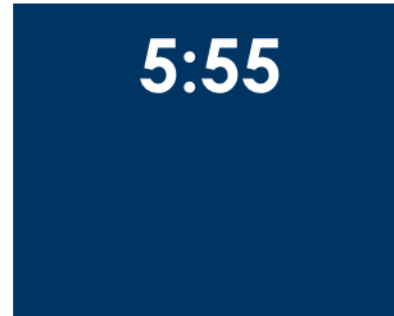
82% growth since 2014



# Podcast listeners are super fans of audio



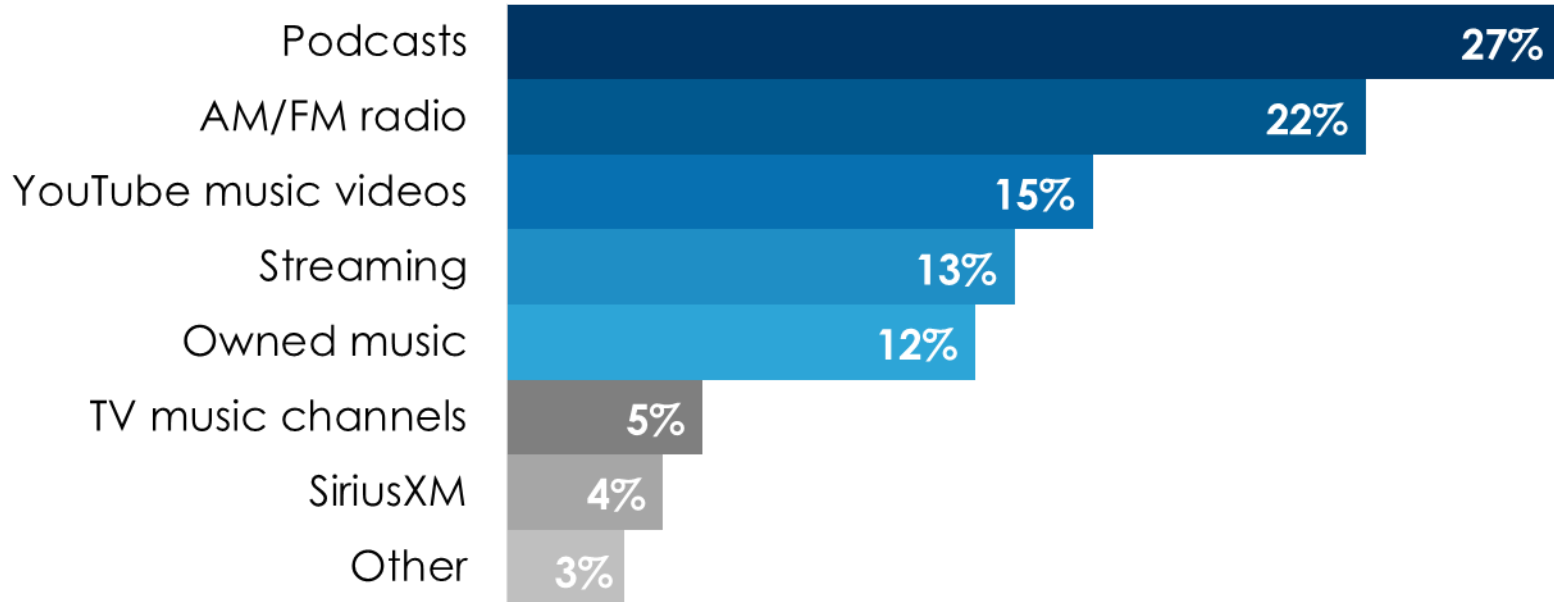
U.S. total:  
daily time spent  
with audio



Podcast audience:  
daily time spent  
with audio

# Podcast consumers listen to podcasts the most

Share of content among podcast consumers



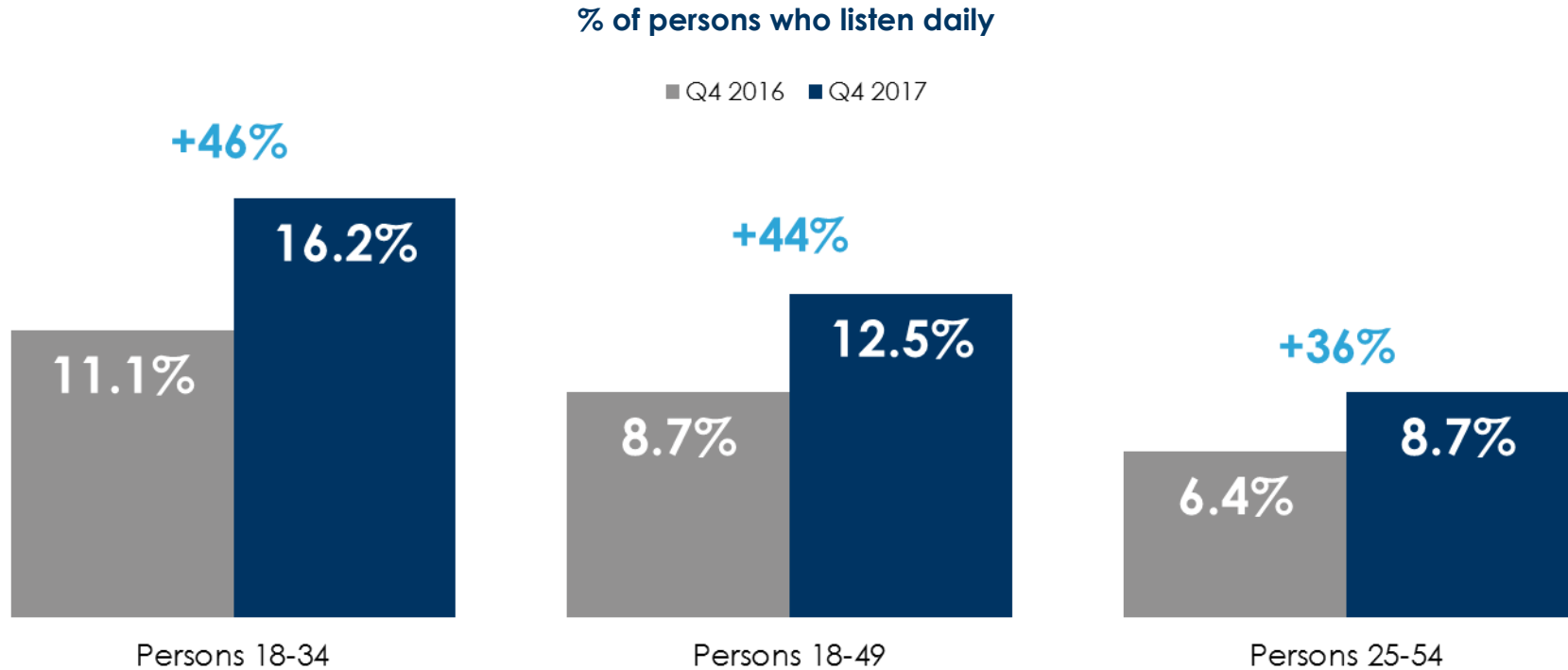
# Audio usage among podcast listeners

Daily reach among podcast listeners and total audio users

Category	Podcast listeners	Total audio consumers
AM/FM radio	66%	71%
Music videos on YouTube	45%	22%
Owned music	41%	28%
Music channels on TV	19%	9%
Spotify	19%	10%
Pandora	19%	13%
SiriusXM	16%	13%
Apple Music	4%	2%
Amazon Music	4%	2%

**How to read:** Among podcast listeners, 66% also listen to AM/FM radio, 45% listen to music videos on YouTube.

# Podcast daily reach soars

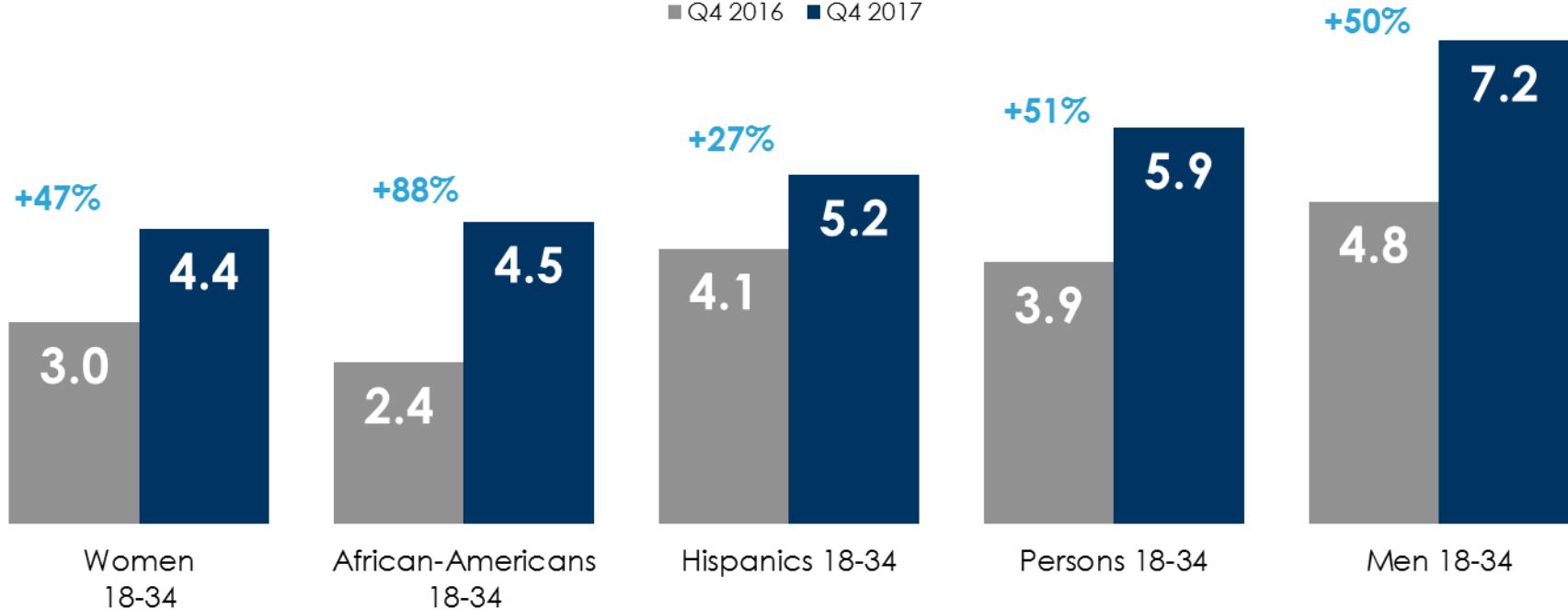




# Podcasting is growing with Millennials

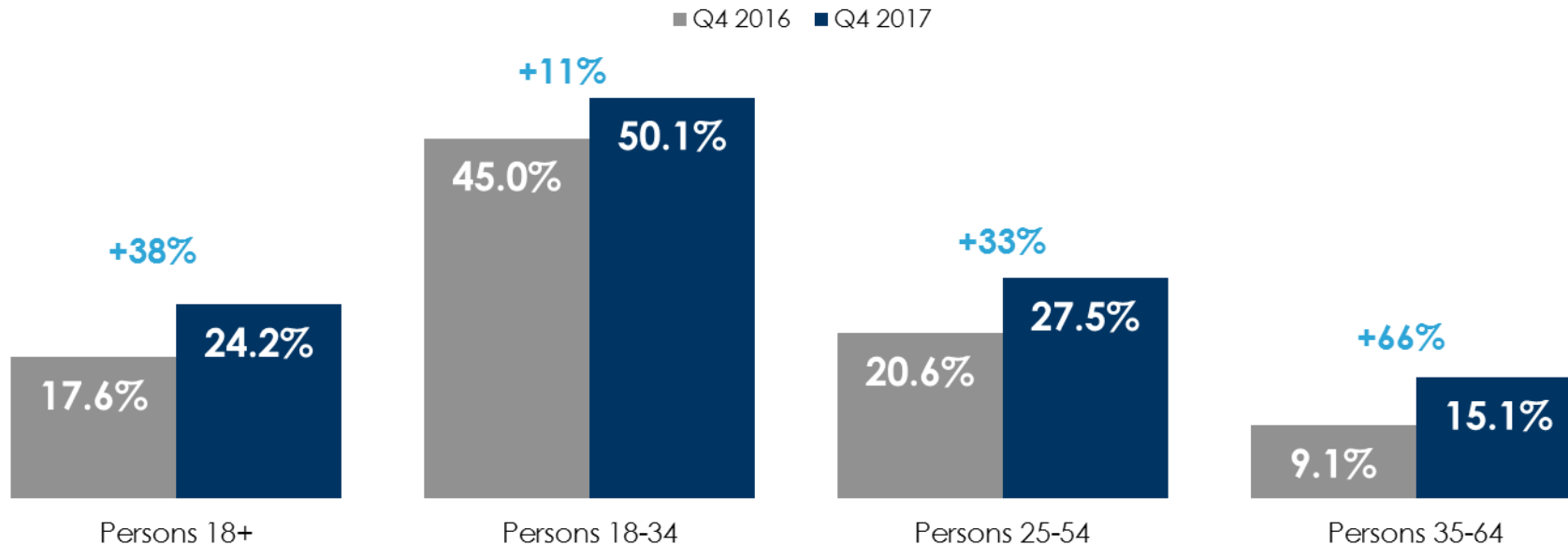
Share of audio time spent among Millennial 18-34 demographics

■ Q4 2016 ■ Q4 2017



# Podcasting grows audio time spent share of talk/personality content

Share of audio time spent with talk/personality content



**How to read:** Of all the time Americans spend listening to talk/personality content, Podcasting share has grown 17.6% in 2016 to 24.2% in 2017.

# The podcast audience is significantly younger

29

Podcast  
median age

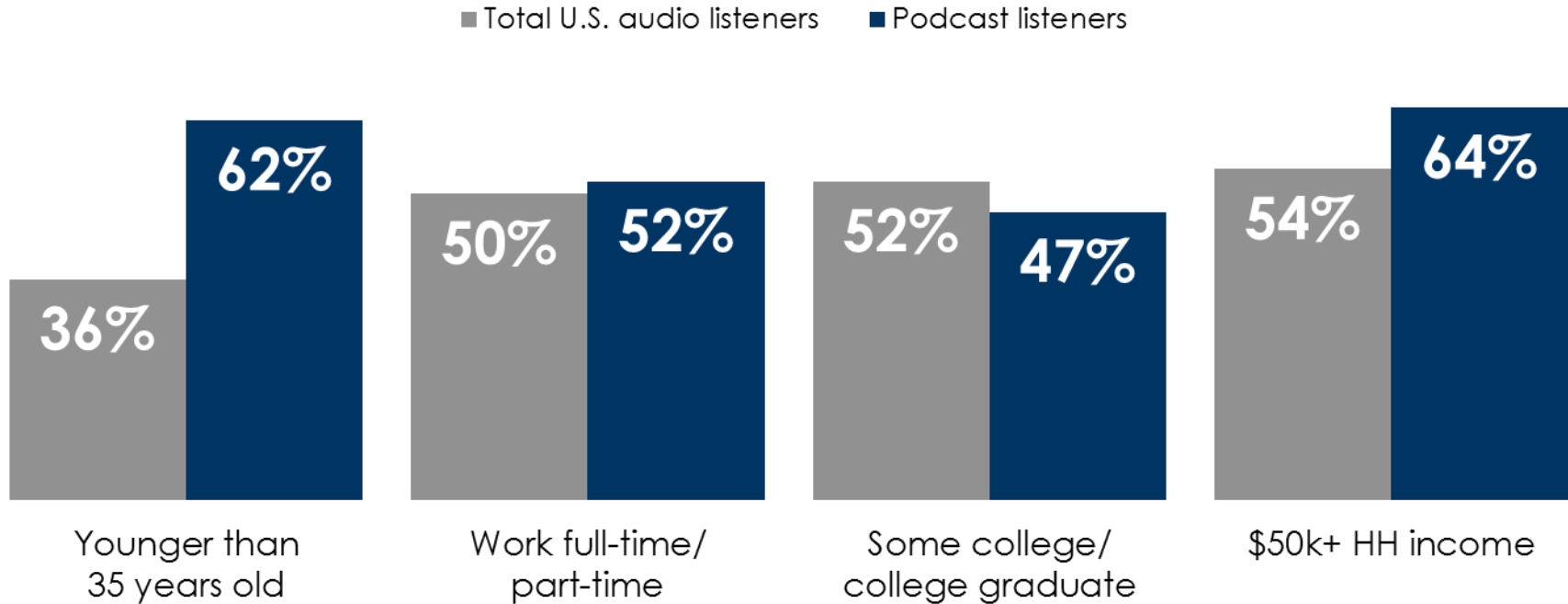
47

AM/FM radio  
median age

55

ABC/NBC/CBS  
median age

# Podcast listeners are younger, employed, and affluent



# Categories with high purchase propensity among podcast audience

Category	Index
Cell/mobile phone apps	197
Mp3 players	171
Headphones	170
Audio equipment & accessories	168
Dry cleaning	166
Cameras/camcorders	164
Sports clothing	164
Fine dining restaurants	163
Tablets & e-readers apps	158
Household furnishings: low ticket items	158

Category	Index
Flower shop	155
Foreign vacations	152
Table settings	150
Contact lenses	149
Personal computers	145
Camping equipment	145
Sport/recreation equipment	145
Internet & catalog shopping	145
Personal computer software	144
Baby furniture & equipment	144

Category	Index
Watches	143
Quick service copy/printing	143
Nonprescription sunglasses	139
Video games	138
Barber shop	137
Men's clothing: big ticket items	136
Men's clothing: low ticket items	136
Domestic vacations	136
Home remodeling	133
Flowers by phone/internet	133

**How to read:** Podcast listeners are 97% more likely than the average population to purchase cell/mobile phone apps.

# Categories with high purchase propensity among podcast audience (continued)

Category	Index
Athletic shoes	132
Home improvements	130
Luggage	130
Clothing expenditures	129
Personal appliances	128
Video game hardware	127
Household furnishings: big ticket items	127
Cellular/mobile phones/ smartphones	125
Children's toys & games	125
Paint/stain	124

Category	Index
Gift cards & prepaid cards	122
Shoes	121
Health & beauty aids expenditures: for men	121
Women's clothing: big ticket items	120
Fine jewelry	120
Any climate control appliance	118
Children's clothing	117
Women's clothing: low ticket items	115
Property & garden maintenance	115
Family restaurants & steak houses	115

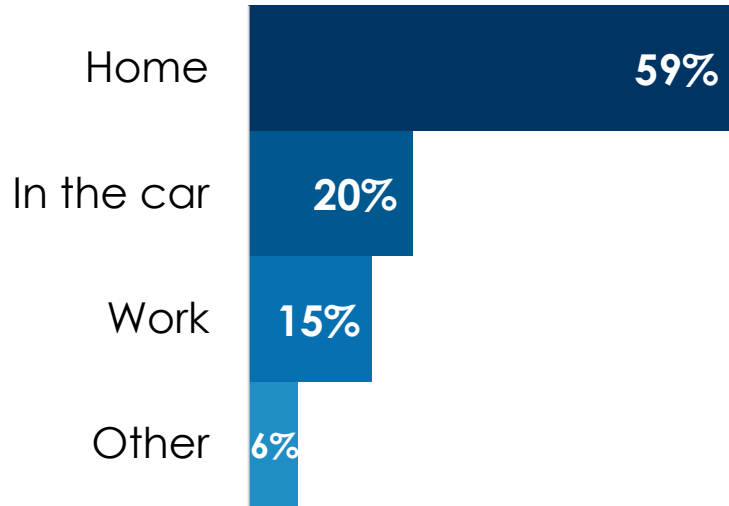
Category	Index
Fast food & drive-in restaurants	115
Bedding & bath goods	113
Health & beauty aids expenditures: for women	112
Children's shoes	111
Convenience stores	111
Food stores (household)	110
Gasoline	109
Food stores (personal)	109
Beauty parlor	108
Cologne for men (gift)	107

**How to read:** Podcast listeners are 32% more likely than the average population to purchase athletic shoes.

# Most podcast listening occurs at home throughout the day

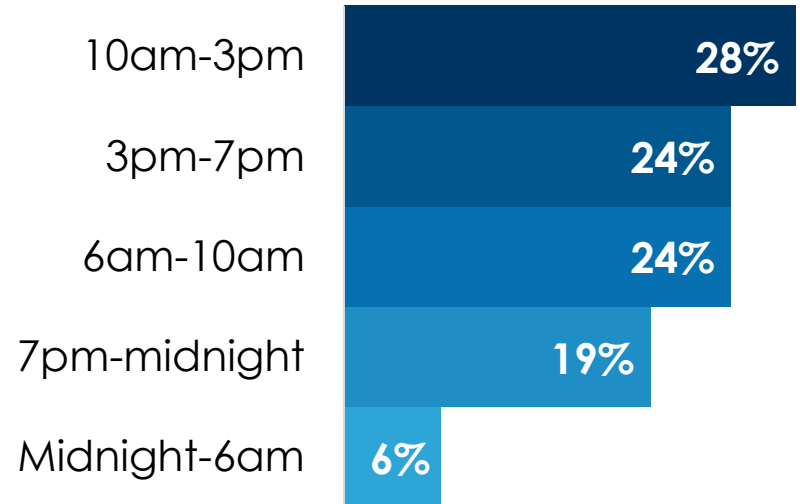
## Where:

% of time spent listening to podcasts by location



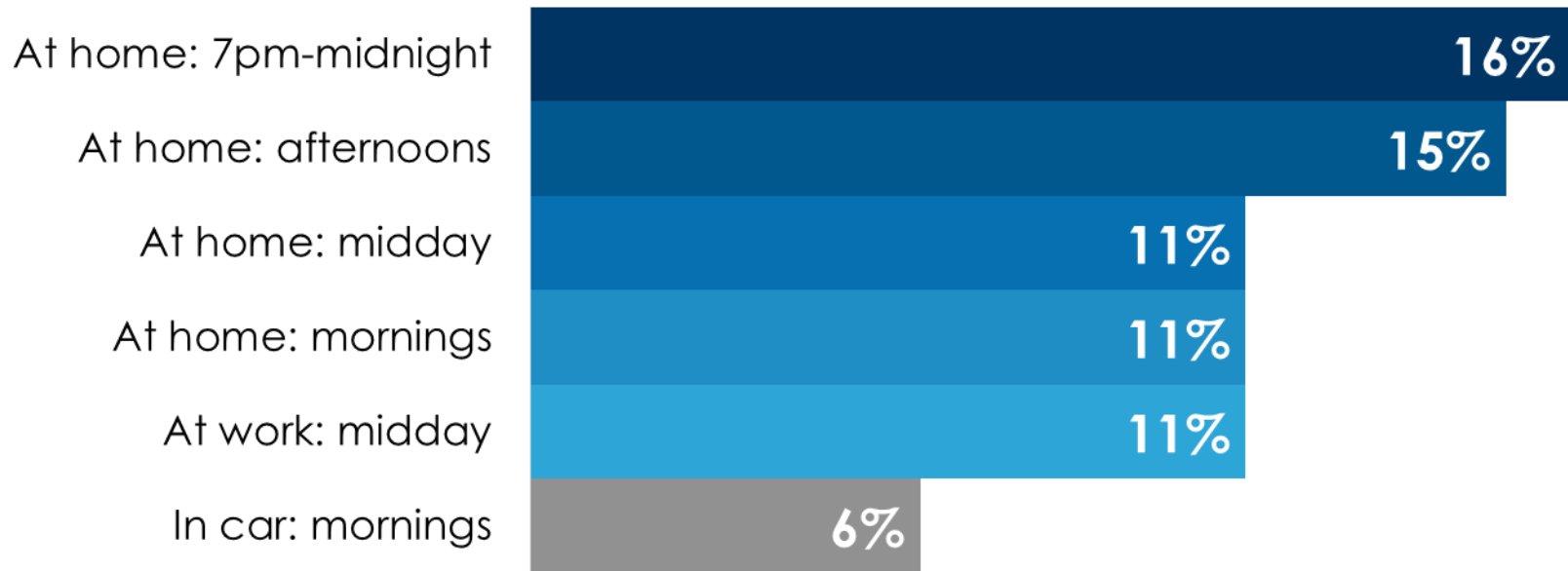
## When:

% of time spent listening to podcasts by time of day



# Podcast listening: top locations and times

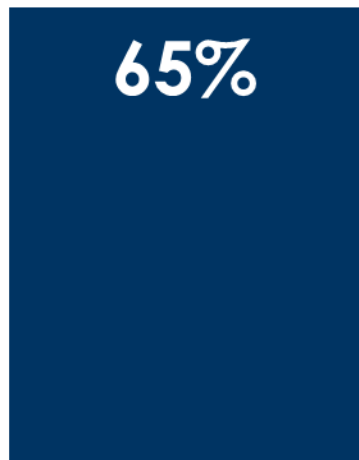
% of time spent listening to podcasts by location and time period



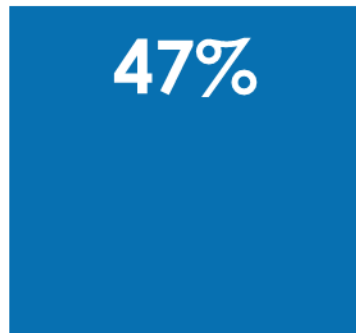


# Ad recall is strong in podcasts

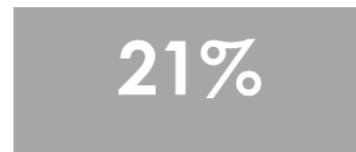
% of podcast listeners who recalled podcast advertising



Listened  
past day



Listened past week,  
not yesterday

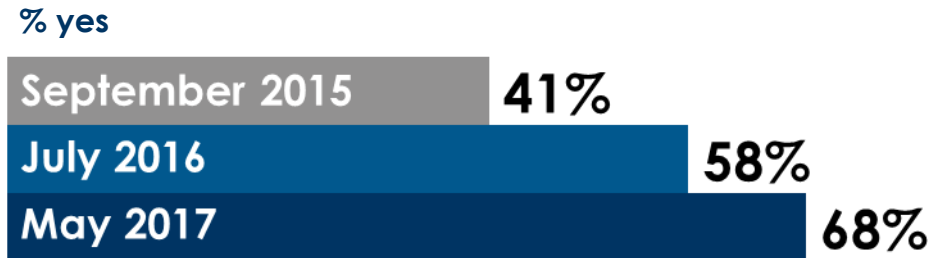


Listened last month,  
not last week

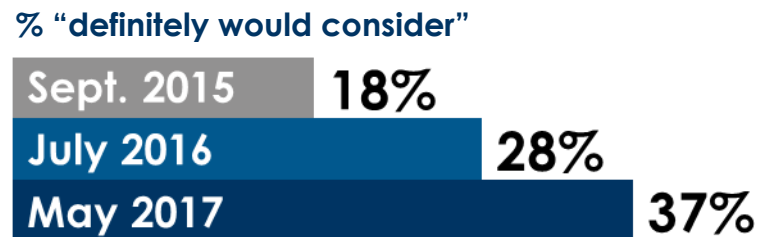
**1 out of 5**  
podcast listeners  
recall an ad they  
heard 2 weeks or  
more after  
hearing it

# More marketers and agencies are considering podcast advertising

Have you and your colleagues discussed podcast advertising for potential media investment?



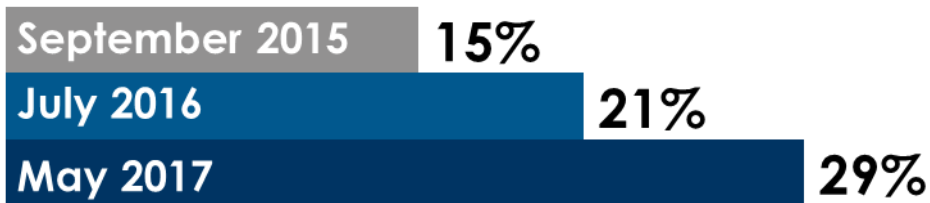
How likely are you to consider advertising in podcasts in the next 6 months?



# More marketers and agencies are already advertising or intend to

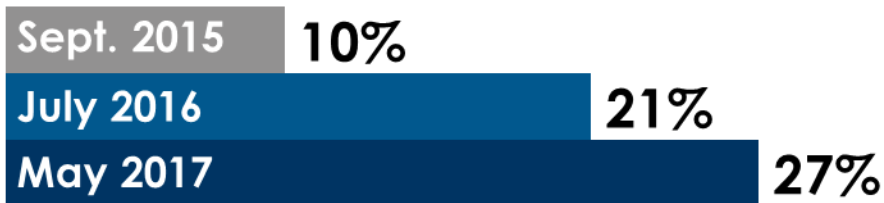
Do you currently advertise in podcasts?

% yes



How likely are you to actually advertise in podcasts in the coming 6 months?

% "definitely will advertise"



# Key takeaways

- Podcast listening is on the rise and shows no signs of slowing down.
- Podcast listeners are super fans of audio.
- Podcast listening is driven by Millennials and Generation Z.
- Most podcast listening happens at home throughout the day.
- Podcast listeners are a desirable group for advertisers.
- Podcast advertising is growing, with more marketers and agencies planning to advertise in podcasts.



# Thank You

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# Appendix

# WESTWOOD ONE PODCASTS

## NEWS/TALK

- The Ben Shapiro Show
- The Michael Knowles Show
- The Andrew Klavan Show
- Jason Stapleton Program
- Viewpoint with Bakari Sellers
- The Dan Bongino Show CRTV
- The Daou Cast
- Frangela: The Final Word

## BRAND INTEGRATION

- Host Live Reads
- Host Endorsements & Sponsorship Opportunities
- Audio Ad Integrations Available
- Social Media Channel Extension Available
- 100% Original Content

## CONTENT DISTRIBUTION



## SPORTS

- Jim Rome Podcast
- Tara and Johnny Show
- The Leisuremen
- Tiki's Barber Shop
- The Kurt Warner QB Podcast with Kevin Harlan
- The DIME Podcast
- PFT PM
- UPROXX with Spandex

## MUSIC & ENTERTAINMENT

- Talk Is Jericho
- UPROXX Celebration Rock
- The Hughley Truth Show
- Zach Sang Show
- Straight Aim
- Curiosity
- Kickin It With Kix



# A diverse lineup of personalities who resonate



Ben Shapiro



Tara & Johnny



Jim Rome



Jason Stapleton



Andrew Klavan



Chris Jericho



D.L. Hughley

## Podcast and personality opportunities:

Custom digital storytelling built around your brand

Personality endorsements

Facebook, Twitter, Instagram, and Snapchat posts

Mobile app integration

Video pre-roll

Live in-studio coverage

Email [khurley@westwoodone.com](mailto:khurley@westwoodone.com) to advertise in Westwood One podcasts