

Mediatel
Connected_

The who, what, when, where, why & how of podcast listening_

Brought to you by Mediatel Connected's Consumer Surveys



January 2021

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IPA
TOUCH
POINTS

rajar
Audio measurement

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Introduction

Who's listening to podcasts? What are we listening to? When are we listening? Where are we listening? Why are we listening and how are we listening?

We bring you key facts and figures from Mediatel's Consumer Surveys app featuring data from: RAJAR's MIDAS; IPA's TouchPoints; Mediatel's Connected Screens and YouGov's Video & Voice.

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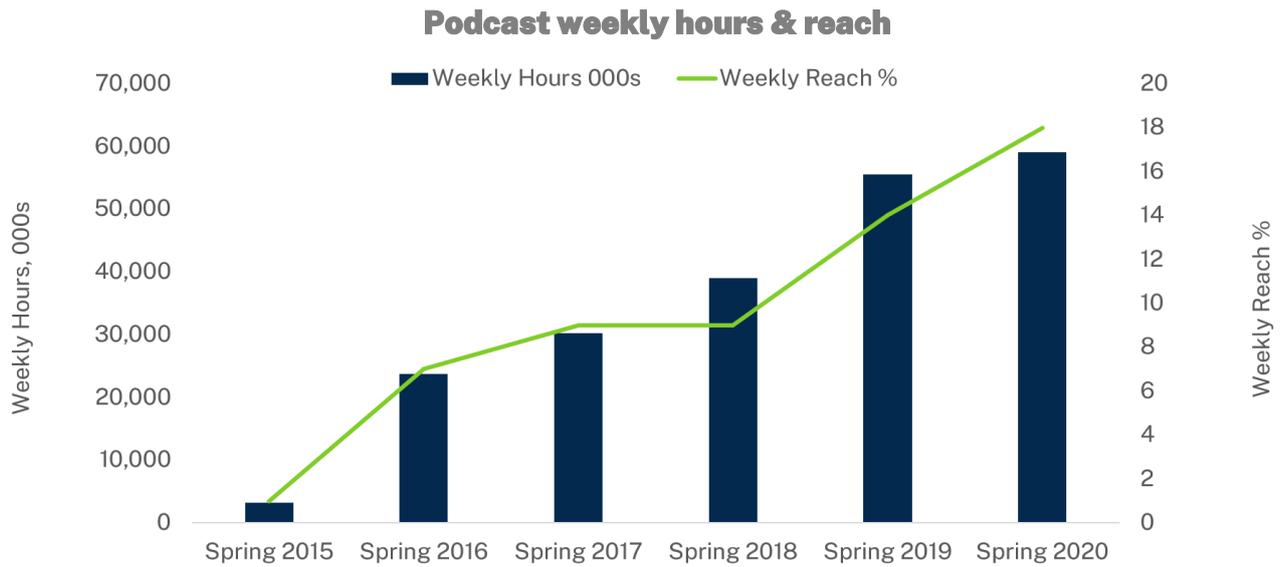
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Who's listening?

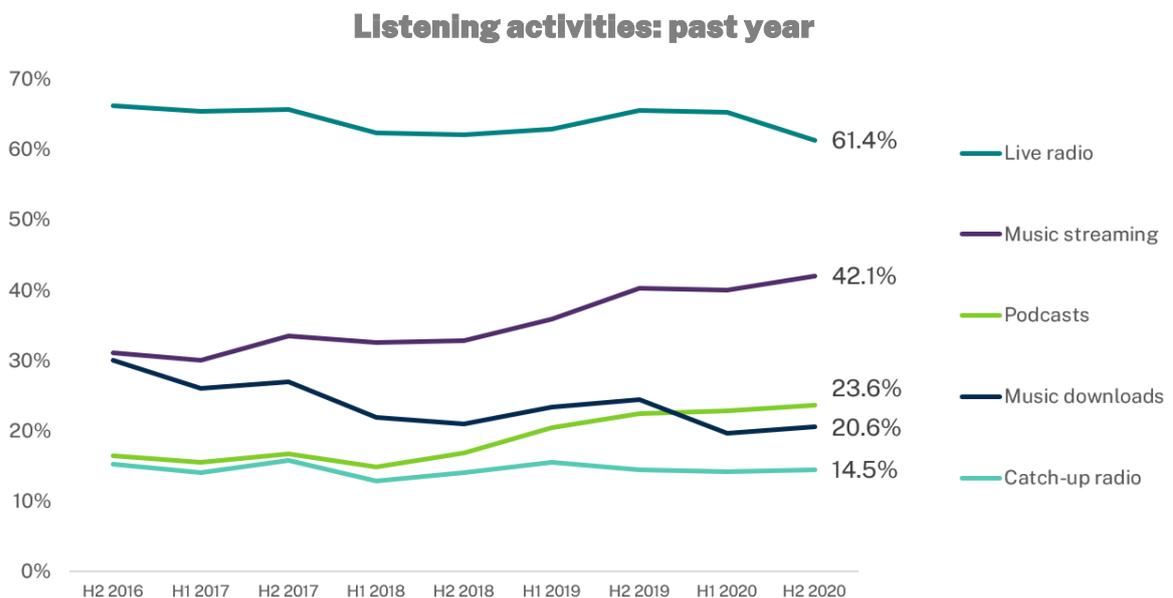
In short, a lot more people are spending a lot more time listening to podcasts than they used to. While podcasts have been around since 2004, they are generating a lot of interest due to dramatic increases in listening over the past five years.

18% of us listened to podcasts each week in 2020, which is double the number who listened two years previous and up from just 1% in 2015. We now listen to almost 60 million hours of podcasts per week, which is over twice what we did two years ago and seventeen times what we did in 2015. Despite this stellar growth, there still remains plenty of potential for further growth.



Source: MIDAS: RAJAR/Ipsos MORI/RSMB; All adults 15+

Growth in podcast listenership is outpacing growth in other media. Audio in general is performing well, but along with music streaming, podcasts is the fastest growing listening activity with 24% of us having listened to a podcast in the past year, compared with 17% two years ago. This rises to 30.5% of 16-34 year olds, up from 25% in the first half of 2018.

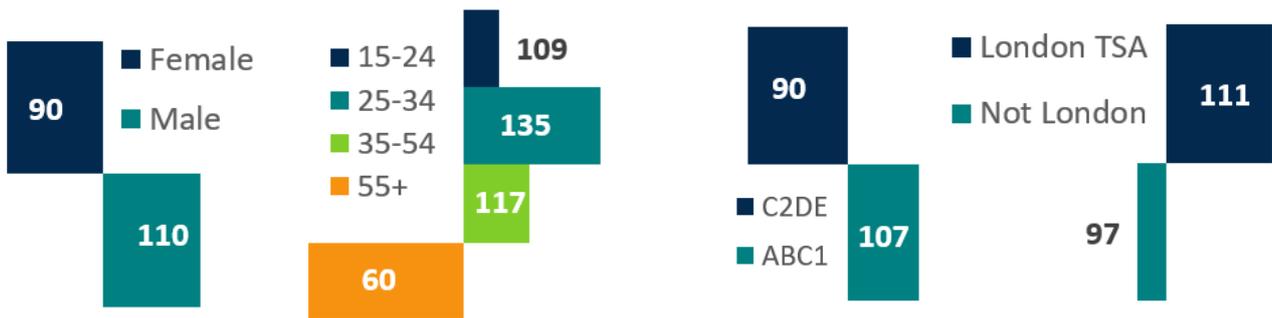


Source: Mediatel Connected Screens; All adults; Thinking about your use of TV, video and radio, which of the following have you done in the last 12 months?

Podcast listeners are especially popular with 25-44 year olds. 25-34 year olds are 35% more likely to listen to podcasts at least weekly than the adult population as a whole and 35-44 year olds are 17% more likely. 27% of 25-34 year olds listen to podcasts every week, compared to 18% of the general adult population.

Podcast listeners also skew male, ABC1 and are 11% more likely to be listened to by Londoners than the population as a whole.

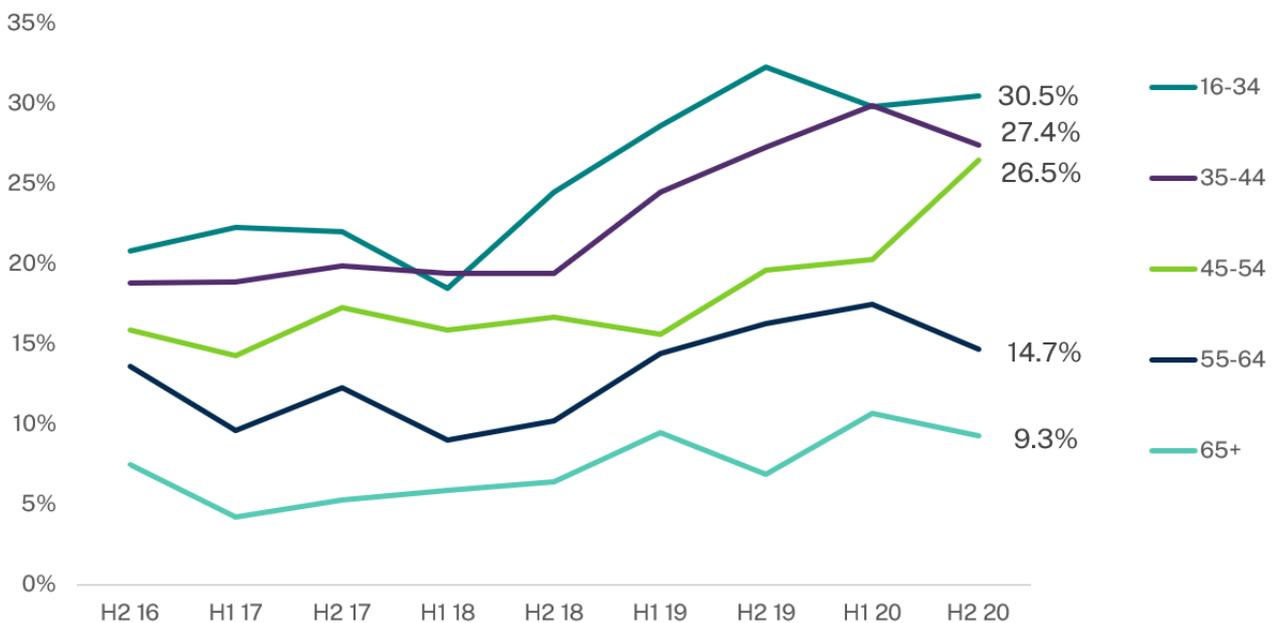
Listen to podcasts at least weekly: Index



Source: MIDAS: RAJAR/Ipsos MORI/RSMB.; All adults 15+; Spring 2020

While podcasts are still more likely to be consumed by younger age groups, growth among these younger age groups is slowing while older age groups catch up, with a strong uplift in usage among 45-54 year olds in particular over the past year.

Have listened to podcasts by age

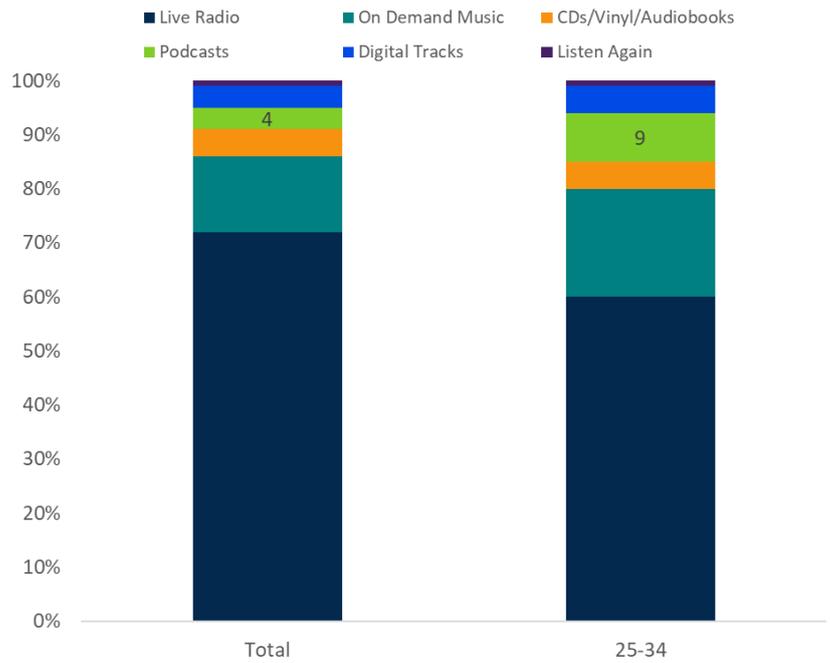


Source: Mediatel Connected Screens; Thinking about your use of TV, video and radio, which of the following have you done in the last 12 months?

Podcast listening share of audio

Despite this growth, it is worth noting that podcast listening remains a small share of total audio hours at 4% for all adults 15+. However, as we have seen, this is growing and, along with music streaming, podcast listening is starting to eat into younger people’s consumption of live radio in particular.

Podcast listening now accounts for a 9% share of 25-34 year olds audio hours.



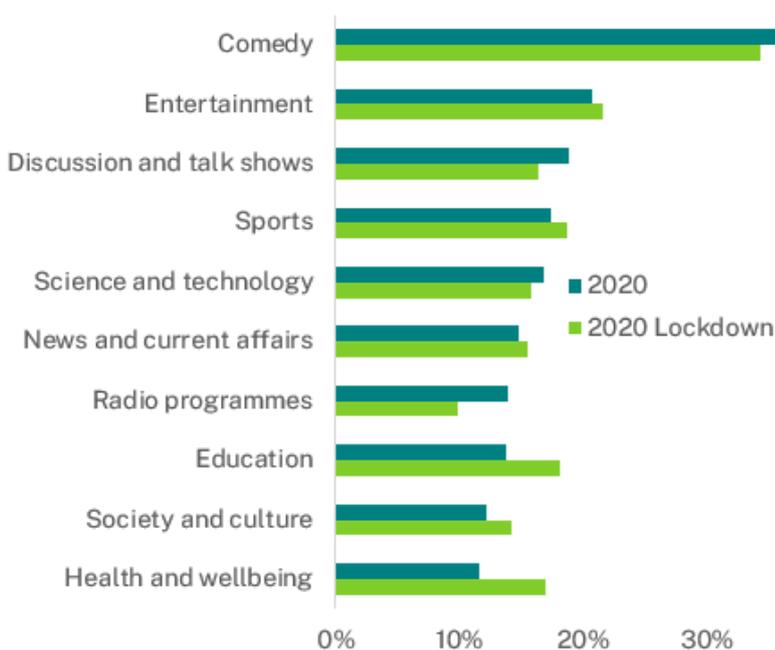
Source: MIDAS: RAJAR/Ipsos MORI/RSMB; Spring 2020; All Adults 15+

What are we listening to?

TouchPoints fieldwork took place from January to May so it is possible to compare responses from pre and post the first lockdown this year to understand its impact. The 2020 figures in these charts are from the fieldwork pre-March 23rd and the lockdown 2020 figures are responses from March 23rd to the end of May 2020.

Both pre and during lockdown, comedy podcasts were the most popular genre of podcasts by quite some way. Around 36% of respondents said they listened to comedy podcasts pre-lockdown and 34% during lockdown.

Podcast topics



During lockdown Education and Health & Wellbeing podcasts both saw the largest increases in listening. There was a 4 percentage point increase in listening to Education podcasts and a 5 percentage point increase in Health and Wellbeing podcasts.

Meanwhile there was a drop of 4 percentage points in people listening to radio programmes, perhaps because there was less need to catch up.

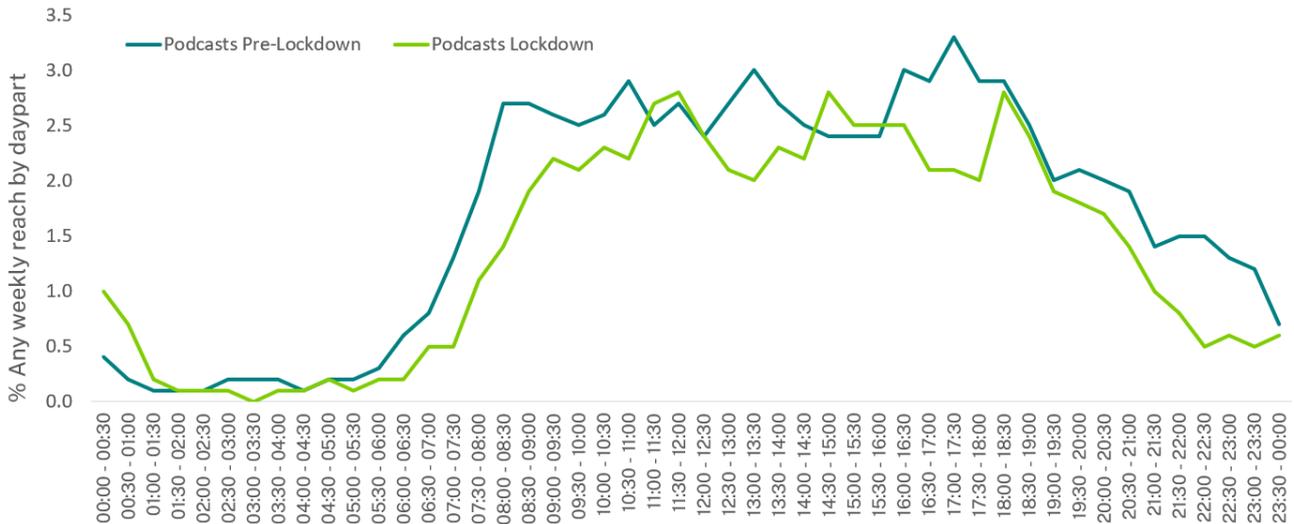
Source: IPA TouchPoints 2020/2020 Lockdown; All adults; Which of the following podcast topics do you listen to most often?

When are we listening?

Podcast listening takes place throughout the day, unlike radio which has a distinct breakfast time peak.

During lockdown, the pre-lockdown spikes in listening during lunchtimes and the evening commute were reversed.

Podcasts: Any weekly reach by daypart

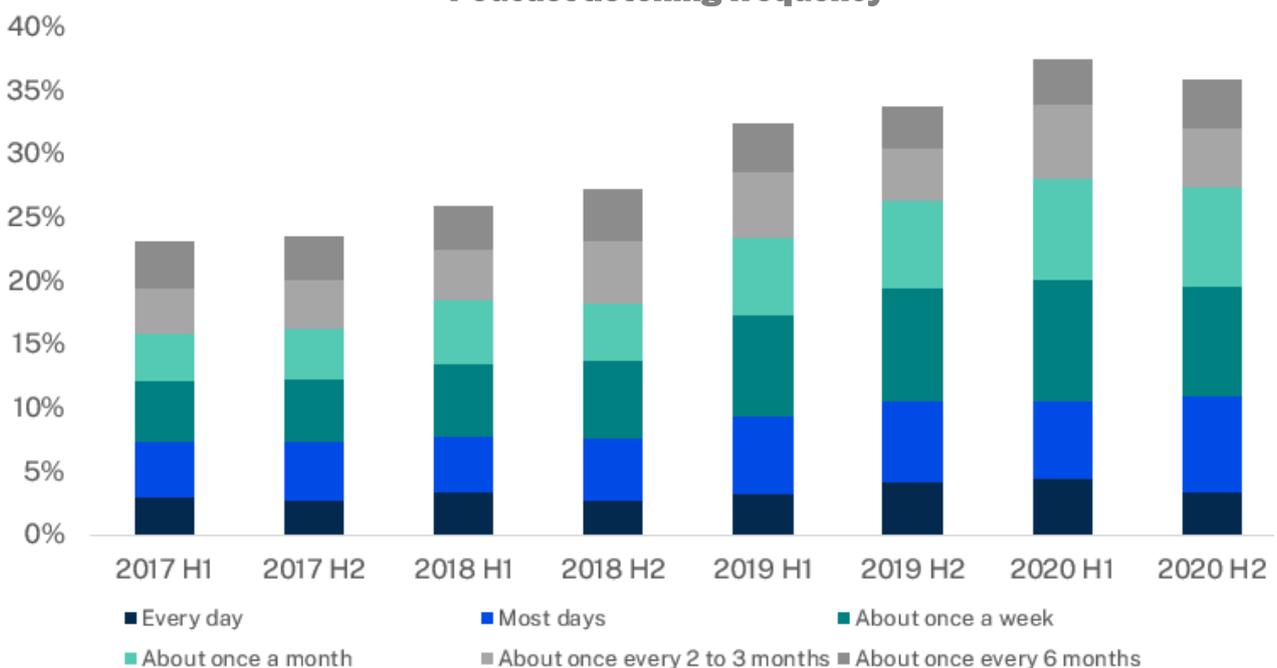


Source: IPA TouchPoints 2020/2020 Lockdown; All adults

The frequency of podcast listening is increasing across all age groups. 10.9% of adults said they listened to podcasts every day or most days in H2 2020, rising to 21.5% for 25-34 year olds. This is up from 7.3% and 12.8% respectively in the same period three years prior.

During H2 2020, 27.4% of adults listened to podcasts at least monthly, rising to 45.3% for 25-34 year olds.

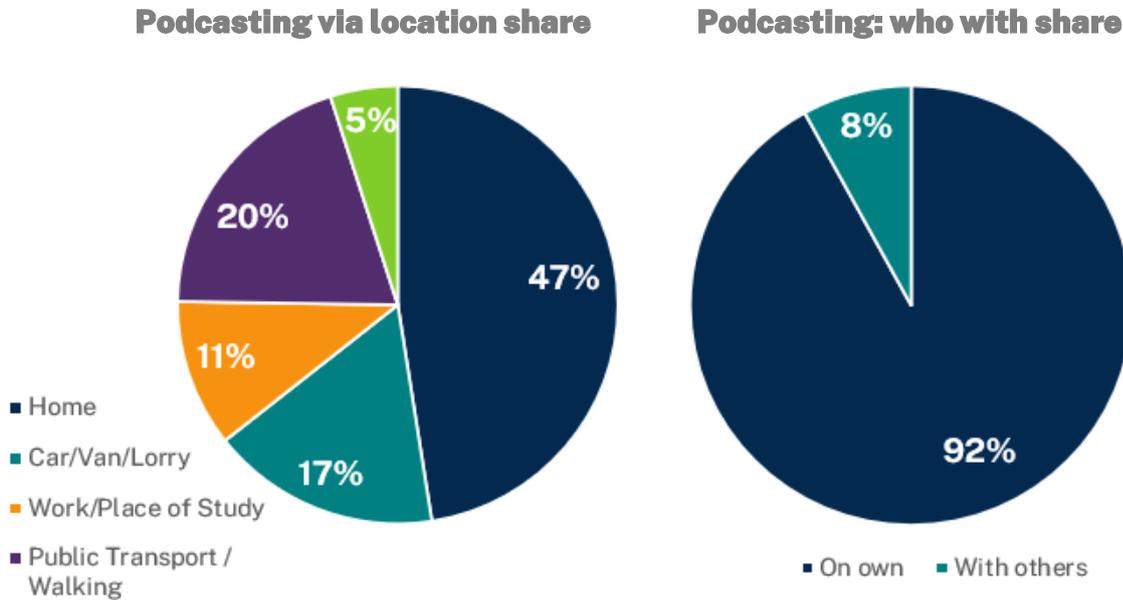
Podcast listening frequency



Source: YouGov; All adults; How often, if ever, do you use each of the following audio services?

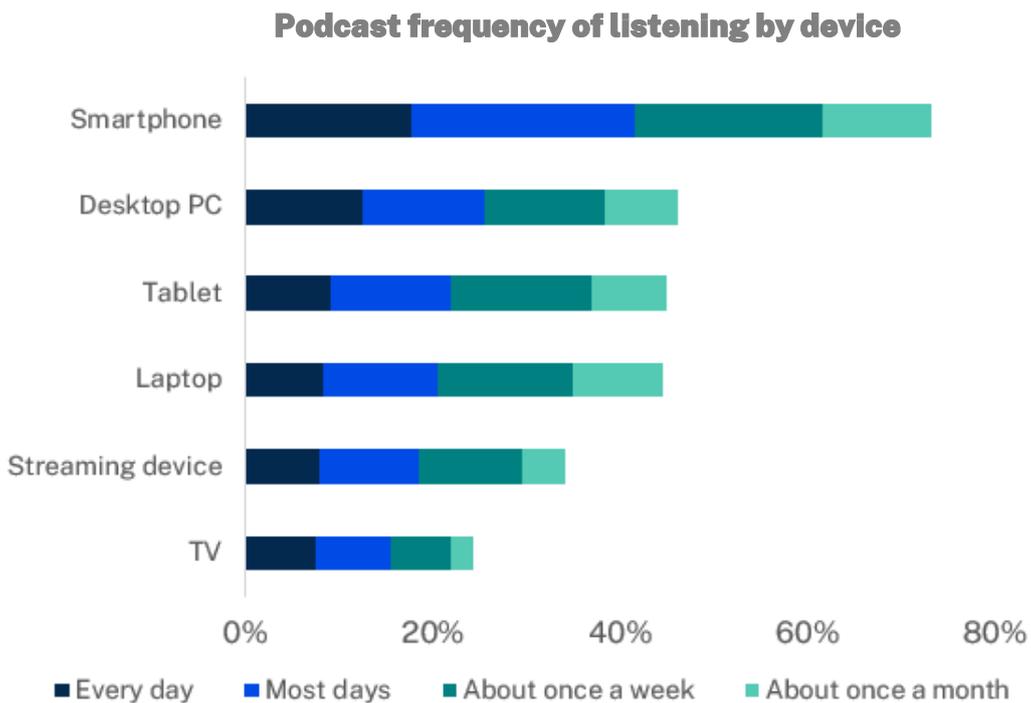
Where are we listening?

Almost half of podcast listening happens at home. But unlike other media consumption, it is very much a solo activity with 92% of listening happening alone.



Source: MIDAS: RAJAR/Ipsos MORI/RSMB; Spring 2020; All adults 15+

The smartphone is very much the preferred device for podcast listening with 73% of adults saying they use the device to listen to them at least monthly.

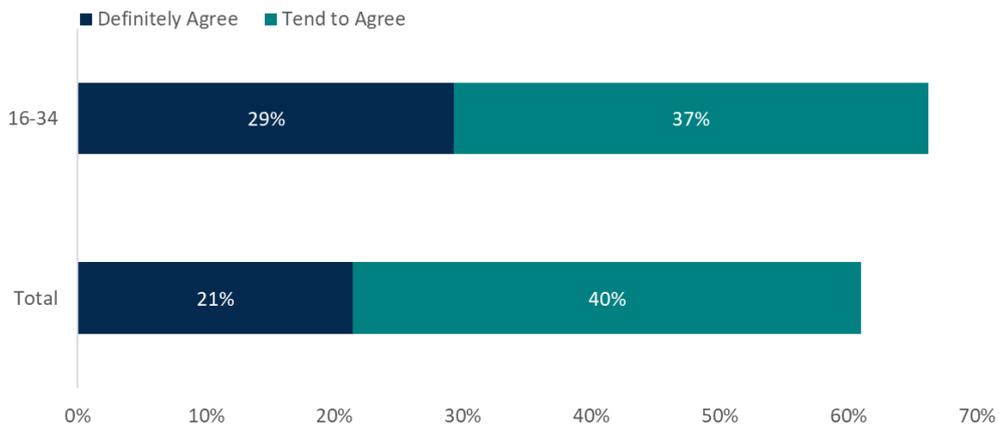


Source: Mediatel Connected Screens; H2 2020; All adults; On which of these devices do you listen to podcasts?

Why are we listening?

During this year's lockdown 61% of podcast listeners either definitely or tended to agree that podcasts offered them something different to the content they get from the radio and that rose by just over 5 percentage points for 16–34 year olds.

Podcasts offer something different

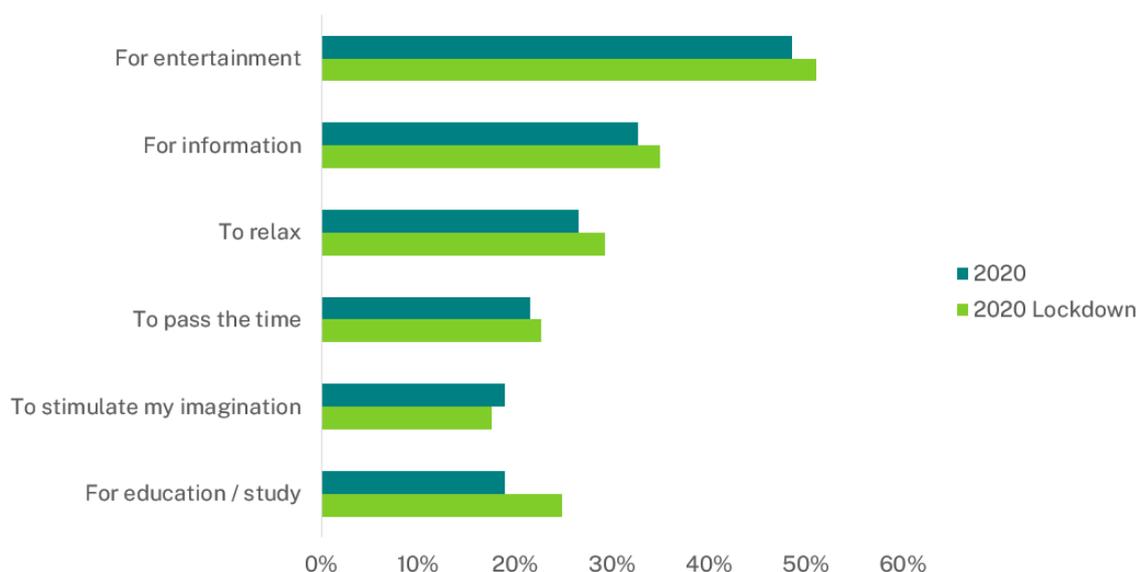


Source: IPA TouchPoints 2020 Lockdown; All adults; Podcasts offer me something different to the content I get from the radio

People listen to podcasts mainly to be entertained, a factor which became even more important during 2020's spring lockdown.

There were subtle changes across the board pre-and post lockdown but the category seeing the biggest increase was listening to podcasts for education / study which increased from 19% to 25% of respondents over the first lockdown period.

Reasons for listening

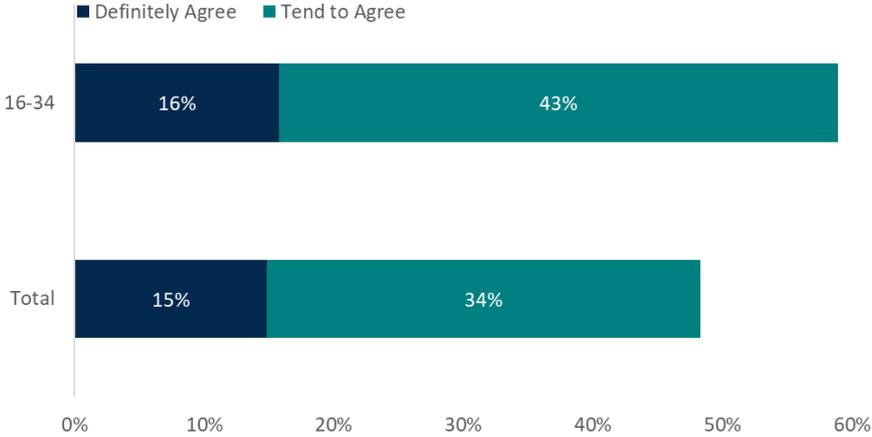


Source: IPA TouchPoints 2020/2020 Lockdown; All adults; What are your main reasons for listening to podcasts?

And while video streaming soared thanks to social distancing, people spent a lot of that time in ad-free environments, such as Netflix, Amazon Prime and Disney+.

Podcast listeners appear more open to advertising with 48% saying they don't mind advertising so long as the podcasts are free, increasing to 59% of 16-34 year olds.

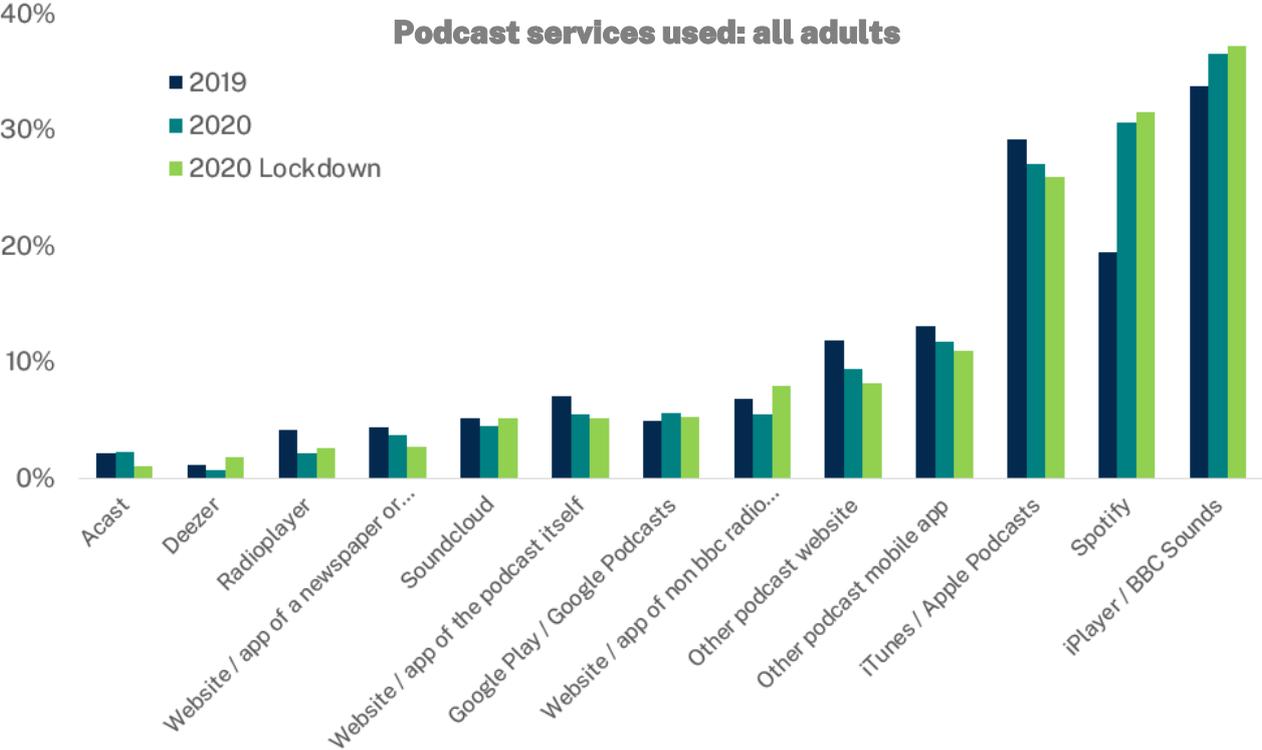
I don't mind adverts if the podcasts are free



Source: IPA Touchpoints 2020 Lockdown; All adults

How are we listening?

While BBC Sounds is the most popular podcast service overall, last year, Apple was the main commercial service through which people consumed their podcasts. This year, both before and during lockdown, Spotify leapfrogged Apple, increasing by 11 and 12 percentage points respectively on 2019 to become the number two service on which people listen to podcasts with 31.5% of those who listen to podcasts saying they used it during lockdown this year.

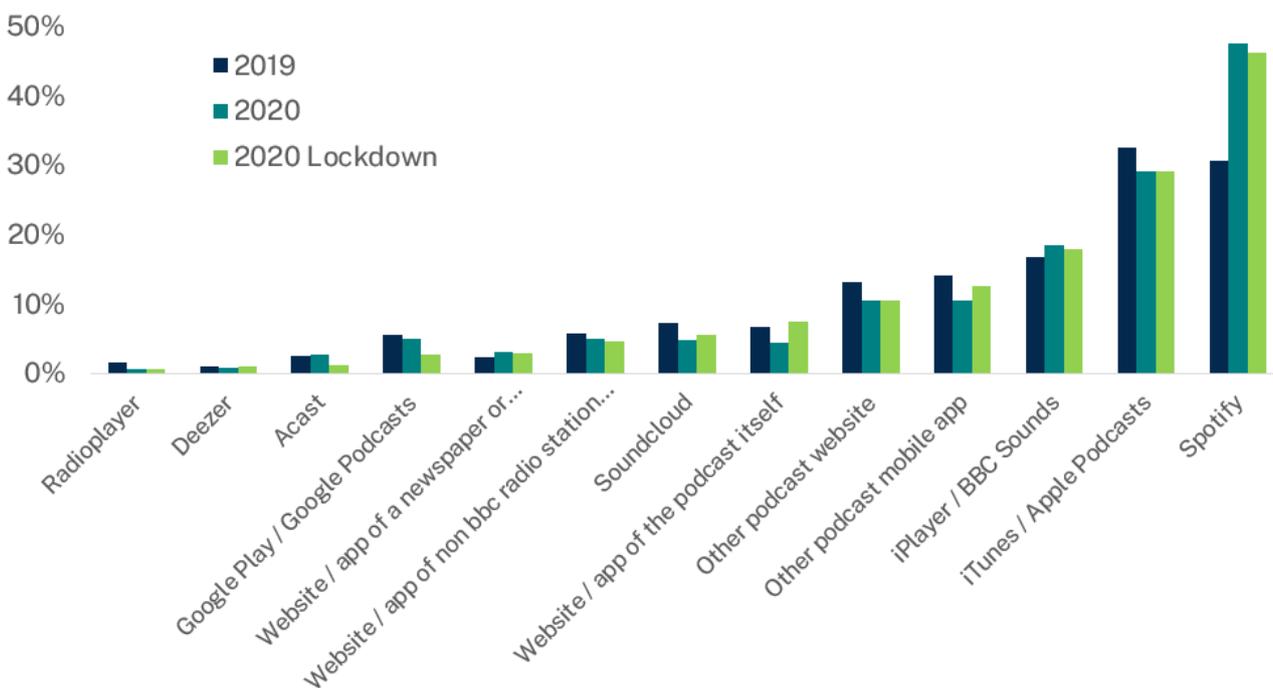


Source: IPA Touchpoints 2019, 2020/2020 Lockdown; All adults; On which service(s) do you tend to listen to or download podcasts?

Spotify's growth as a podcast platform is even more evident among younger audiences. Last year 33% of 16-34 year olds who listen to podcasts said they tended to use iTunes or Apple podcasts to listen to them and 31% used Spotify.

This year almost 48% said they tended to use Spotify to listen to or download podcasts just before lockdown this year, and 46% during, up 17 and 15.5 percentage points year on year respectively. Meanwhile Apple dropped by almost 3 percentage points to 29%.

Podcast services used: 16-34 year olds



Source: IPA TouchPoints 2020/2020 Lockdown; 16-34 year olds; On which service(s) do you tend to listen to or download podcasts?

Where next?

Podcasts have a fast growing audience, and one which is highly attractive to marketers.

Podcasts offer something different to other forms of media with most people listening by themselves, through headphones, creating a uniquely intimate connection between listener and host.

While podcasts still account for a small share of total audio hours and ad revenue, this fast growth and point of difference is attracting plenty of interest from the tech giants and Spotify.

Unlike digital however, due to the technology podcasts use and their distributed nature, for now at least, engaging listeners at scale is tricky with little targeting or intelligence available.

However, with new technology, partnerships and acquisitions happening at pace, we will be here, every step of the way, bringing you news, events, data and insights to keep you abreast of the latest developments in this fascinating growth area.

Consumer Surveys

The data in this report is taken from surveys which are available in Mediatel Connected's award winning Consumer Survey's app.

Consumer Surveys is a simple yet powerful app which makes quick work of visualising and interrogating hundreds of questions from the six trusted industry surveys, listed below.

Consumer Surveys is just one of many data modules provided by Mediatel Connected, the largest single source of media intelligence in the UK: mediatel.co.uk/connected

Mediatel's Connected Screens survey

- 6 monthly
- 2,000 respondents, nationally representative
- Exclusive. Online survey, broadband households
- Track screen ownership and screen behaviour

BARB Establishment Survey

- Quarterly, constant feedback
- 53,000 interviews per year
- Nationally representative
- Device ownership and subscription levels

IPA TouchPoints

- Annual
- 6,000 online self-completion questionnaire and weekly diary via respondent's smartphone
- Nationally representative
- Covering attitudes, shopping and media behaviour

Ofcom Technology Tracker

- 6 monthly
- Around 3,000 face-to-face home interviews
- Nationally representative
- Track attitudes and behaviour on broadcasting

YouGov Video & Voice

- 6 monthly
- 2,000 respondents
- Exclusive. Online survey, broadband households
- Video & audio brands; voice activated market

RAJAR MIDAS

- Quarterly
- 2,000 RAJAR respondents
- Online diary and questionnaire
- Digital audio across different platforms and devices

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