

THE PODCASTING BOOM

A comprehensive study of radio, audio,
and podcasts listeners in Poland

Radosław Sączek, creative group head
Michał Dobrzański, head of research and development

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K I N O R A D I O B R O K E R

Paris, egta MIM conference, 30.01.2020



FIRST (01.2019) WE KNEW THE
PODCASTS ARE LISTENED TO BY:

20%

EVER

Nielsen for Storytel
Kantar for KBR
Kantar for TOK FM

12%

LAST MONTH

Nielsen for Storytel (18-49)

START

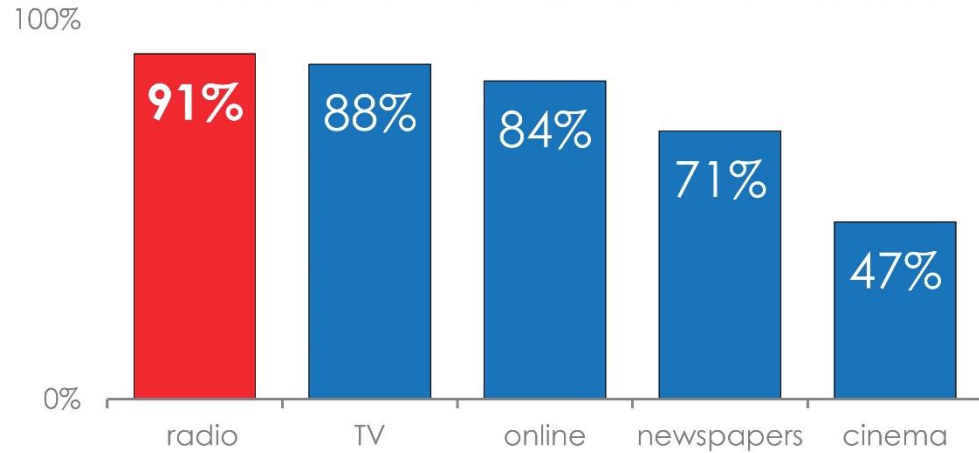
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KINO RADIO BROKER

BEFORE WE START...

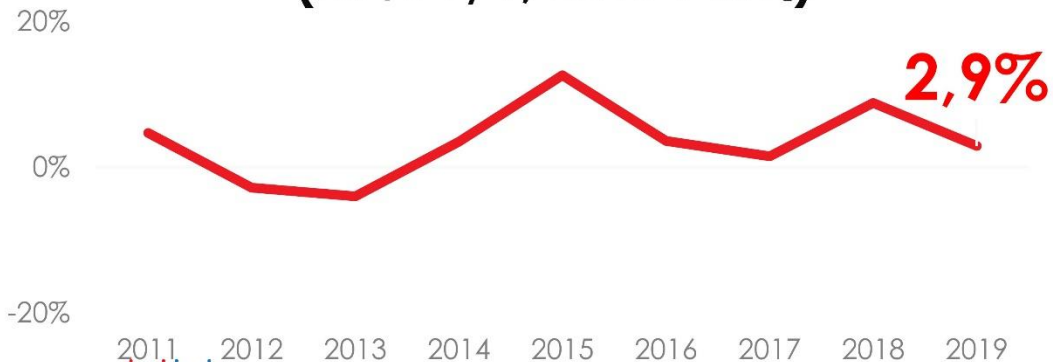


MARKET OVERVIEW – POLAND

MEDIA CONSUMPTION I-IX 2019



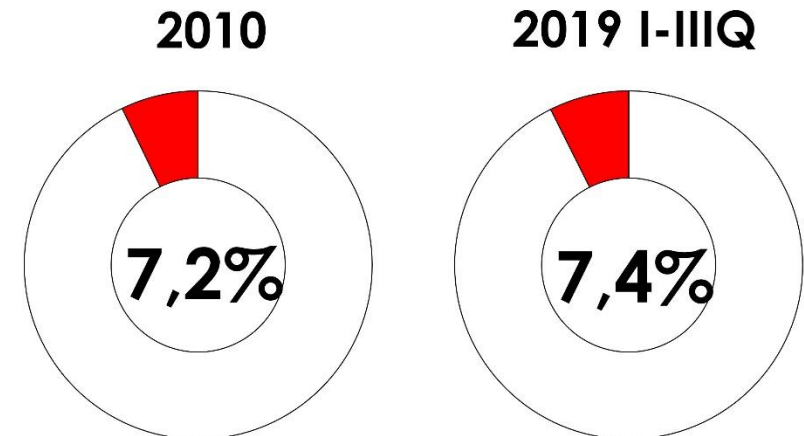
ADVERTISING MARKET GROWTH (IN % Y/Y, 2019 I-IIIQ)



DAILY RADIO TSL (h'min)



RADIO ADVERTISING SHARE (IN %, NET)





Pierwsze
Radio
Informacyjne

NEWS&TALK



Radio

złote przeboje

ADULT CONTEMPORARY



ROCK



OLDIES

AGORA

2018: 270 MLN EUR

~5000 EMPLOYEES

~10 MLN LISTENERS

WEEKLY

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WE ARE THE AGORA RADIO AND CINEMA BROKER



**RADIO AND CINEMA
ADVERTISING BROKER**



**CREATING
UNIQUE AND DEDICATED
CONTENT**

**PODCAST
AUDIO ADVERTISING**



**COMPANY/PERSONAL BRANDING
(PARTICIPATION OF EXPERTS/EXPERT
PLACEMENT)**

**CREATIVE
FORMATS**



PRODUCT PLACEMENT

UNIQUE MONETIZATION MODEL OF TOK FM PODCASTS – SUBSCRIPTION...



5 EUR/M



5 EUR/M

NETFLIX

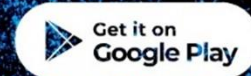
8 EUR/M

20 000

of paid subscriptions



and it's only the beginning



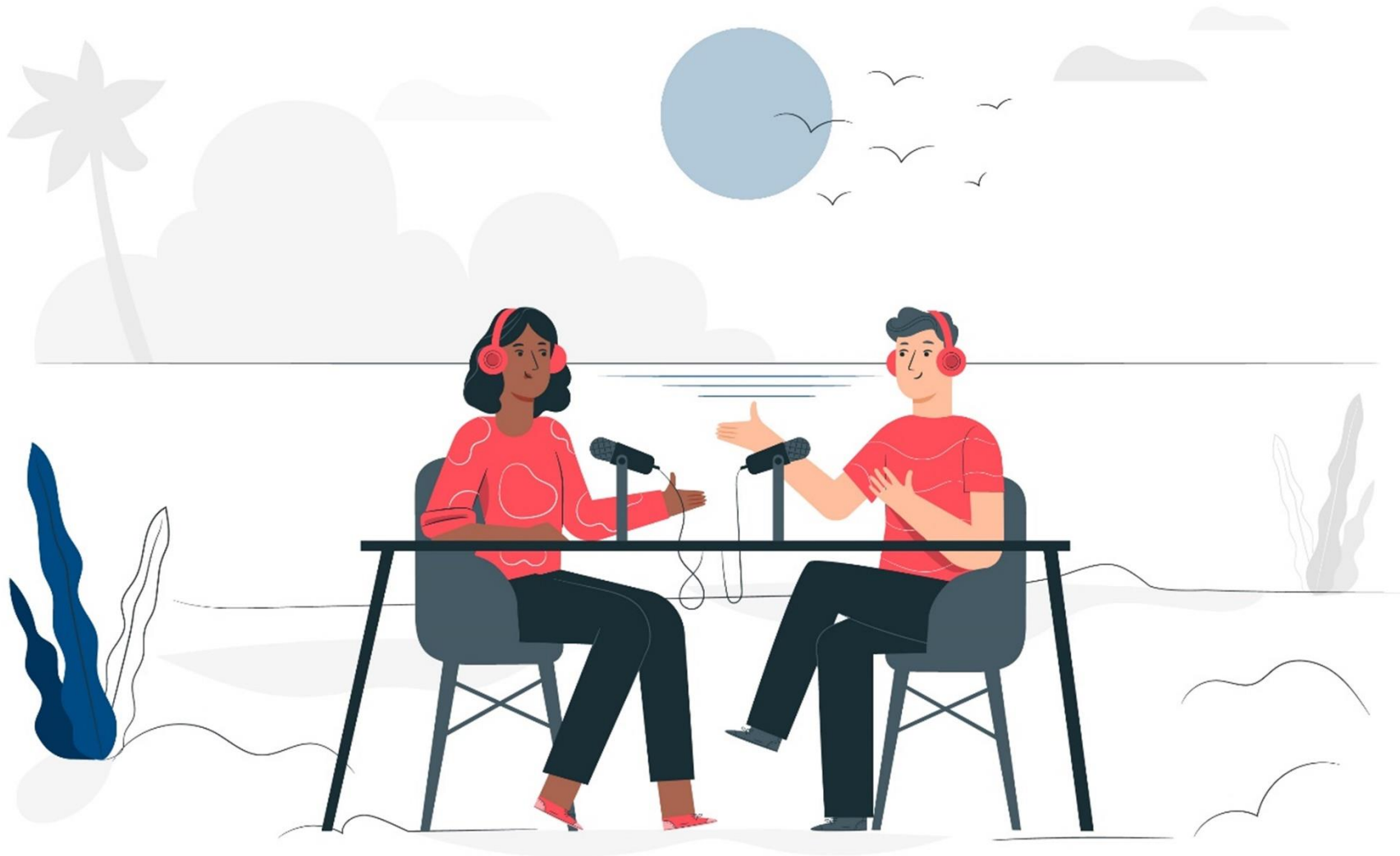
70 000
MONTHLY ACTIVE
USER ACCOUNTS

100 000
EPISODES
IN LIBRARY

10-15h
OF NEW PODCAST
CONTENT DAILY

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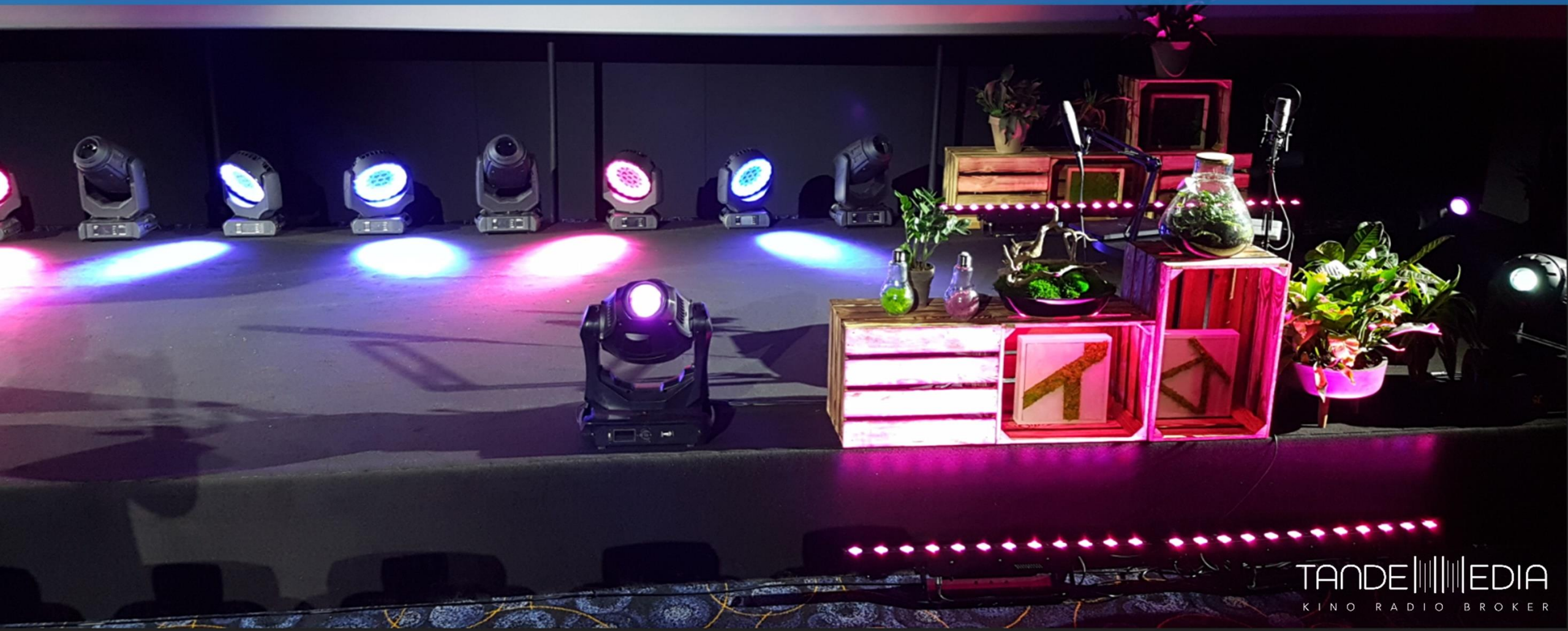
...AND ADVERTISING. BUT IN LATE 2018, THE MARKET WASN'T READY YET.



MINDSHARE



SO WE HAD TO LEARN THEM. CONFERENCES, PRESENTATIONS, TRAININGS...



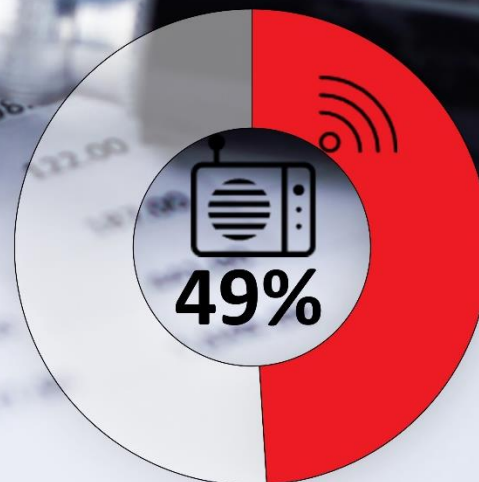
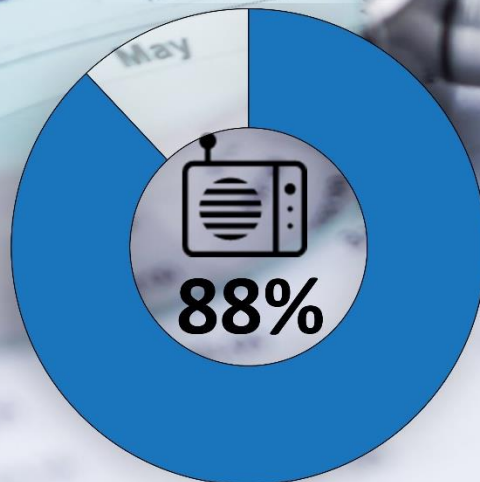
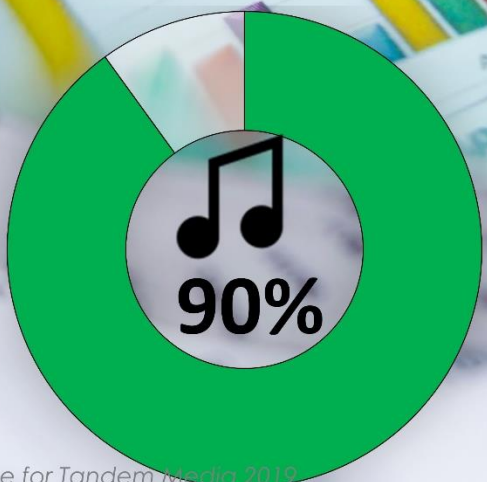
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WE HAD REALISED THAT WE NEED TO CONDUCT A HUGE MARKET RESEARCH



SUMMER 2019 – AUDIO/RADIO/PODCAST STUDY

FIELD AND ANALYSIS BY PUBLICIS GROUPE
CAWI, N=1000-1200 EACH
AUDIO STUDY
RADIO FM/ONLINE STUDY
PODCAST STUDY



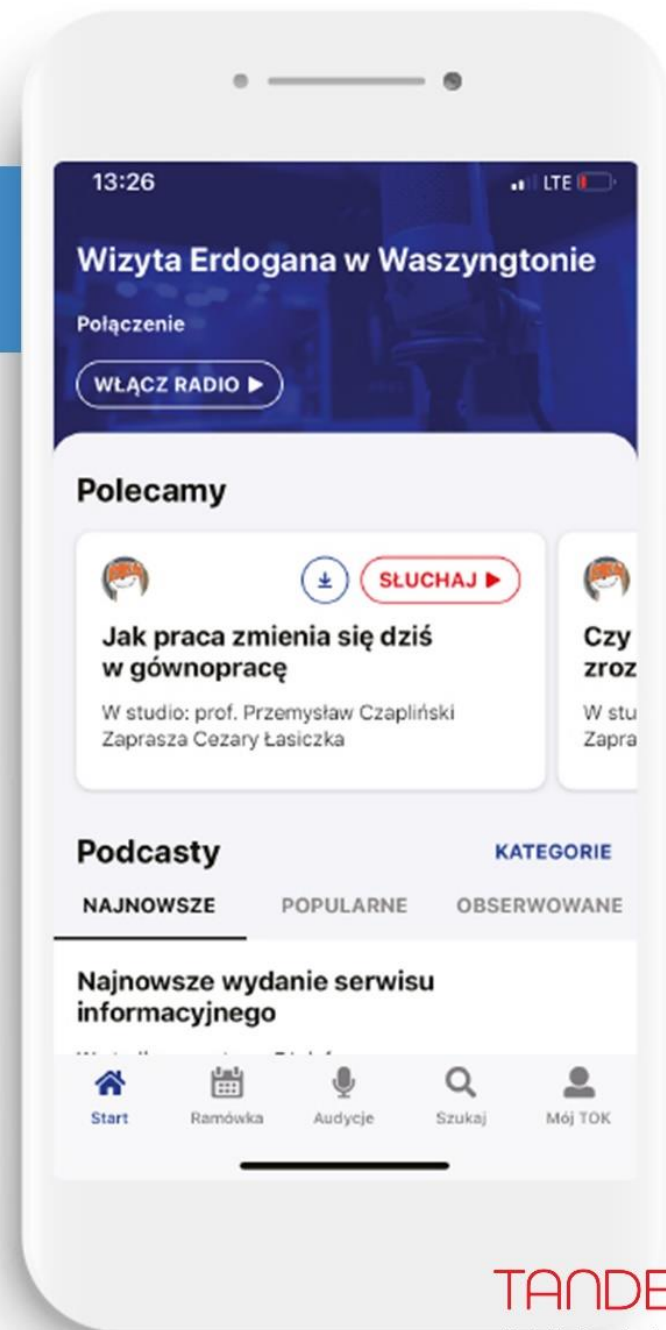
PODCASTS AND LISTENERS WERE EVERYWHERE



EAT
SLEEP
LISTEN
REPEAT



WE WERE READY SINCE YEARS!



THE MARKETERS' INVESTMENTS DID NOT HAPPEN WITHOUT THE REASON



FOR OUR CUSTOMERS, THE MOST IMPORTANT ARE...



TARGET PREMIUM



HIGH ADV. ACCEPTANCE

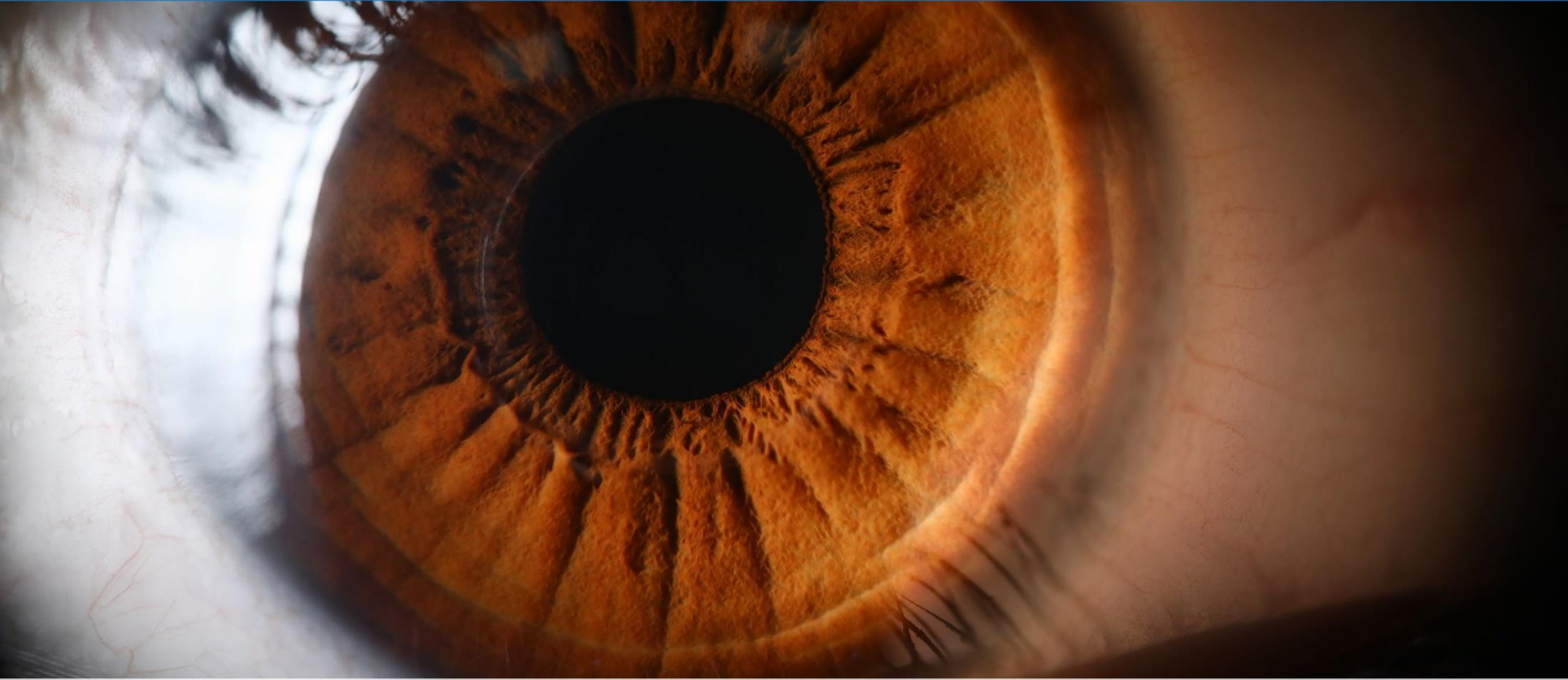


RELIABLE, EXPERT CONTENT



TIME SAVING

WHY DO WE CALL IT A BOOM? – #1 ADVERTISERS



Astonishing increase of advertiser's demand

WHY DO WE CALL IT A BOOM? – #2 OFFER INCREASE



Independent hosts offer increased very significantly

WHY DO WE CALL IT A BOOM? – #3 LISTENERS

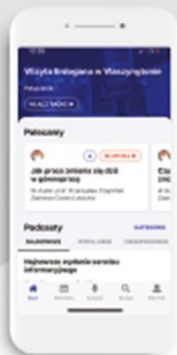


Huge increase of podcasts awareness and listeners

PODCASTS MONTHLY REACH IN POLAND

27%

**LISTENED TO PODCAST
IN LAST
MONTH**



**EVERY FOURTH POLISH
INTERNET-USER LISTENS
TO PODCASTS**

65%

**OF THEM STARTED
WITHIN LAST YEAR**

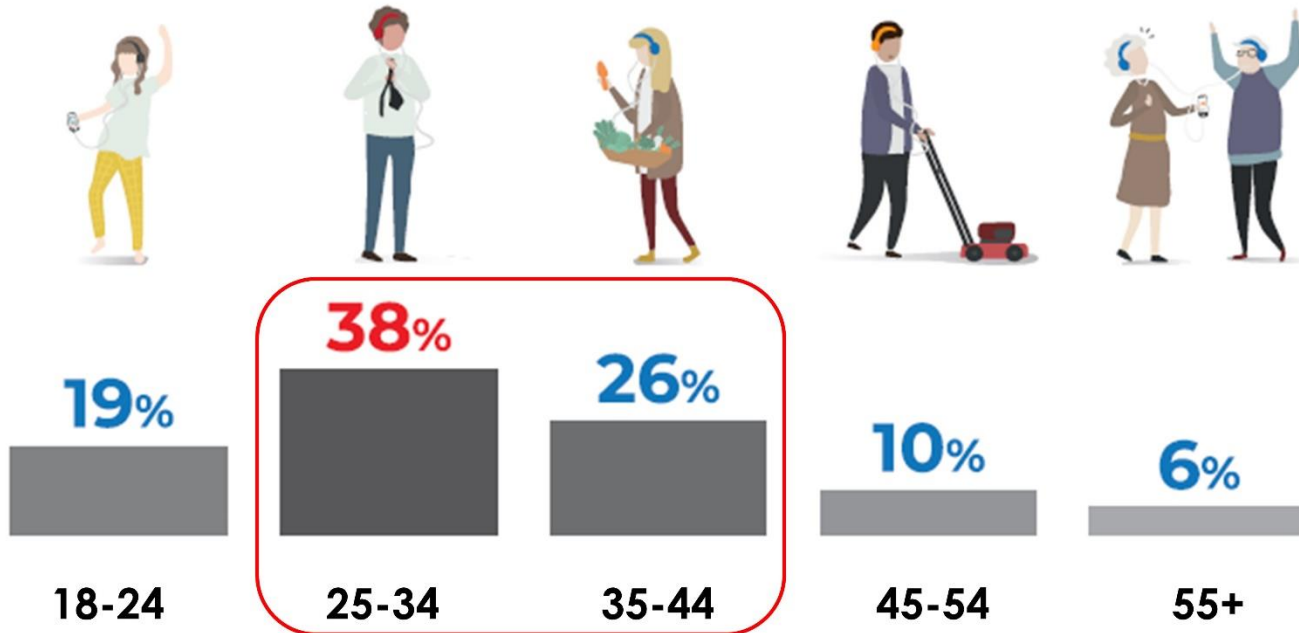
55%

**HEAVY USERS –
WEEKLY LISTENERS**

PODCASTS LISTENERS PROFILE

PODCASTS LISTENERS PROFILE

AGE



LOCATION



80%
LIVE IN URBAN AREAS
133 AFF

SEX



33%
MEN

67%
WOMEN

PODCASTS LISTENERS PROFILE

JOBS



24%
DECISION-MAKERS
MANAGERS/OWNERS
373 AFF

EDUCATION



51%
HIGHER EDUCATION
(GRADUATE)
203 AFF

INCOME



25%
WITH HIGH INCOME
WHILE 13% AMONG
NON-LISTENERS
192 AFF

INTEREST/MEDIA PERCEPTION

INTERESTS



79%

FILM, BOOKS,
MUSIC



73%

SCIENCE,
TECHNOLOGY



72%

NEWS



69%

SPORT,
HEALTH



69%

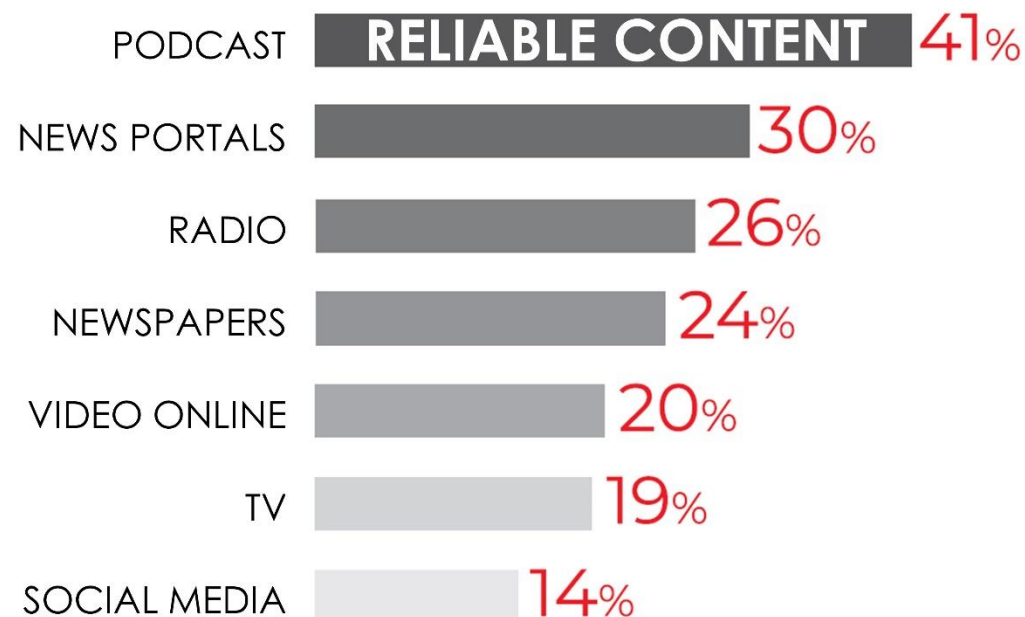
SOCIAL
PROBLEMS



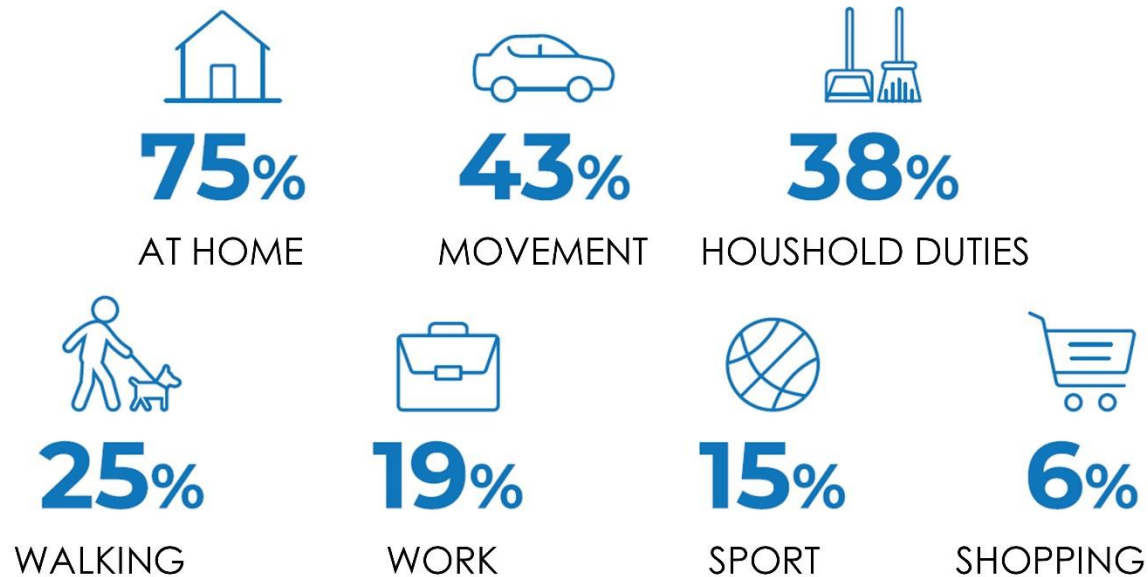
38%

CELEBRITIES
LIFESTYLE

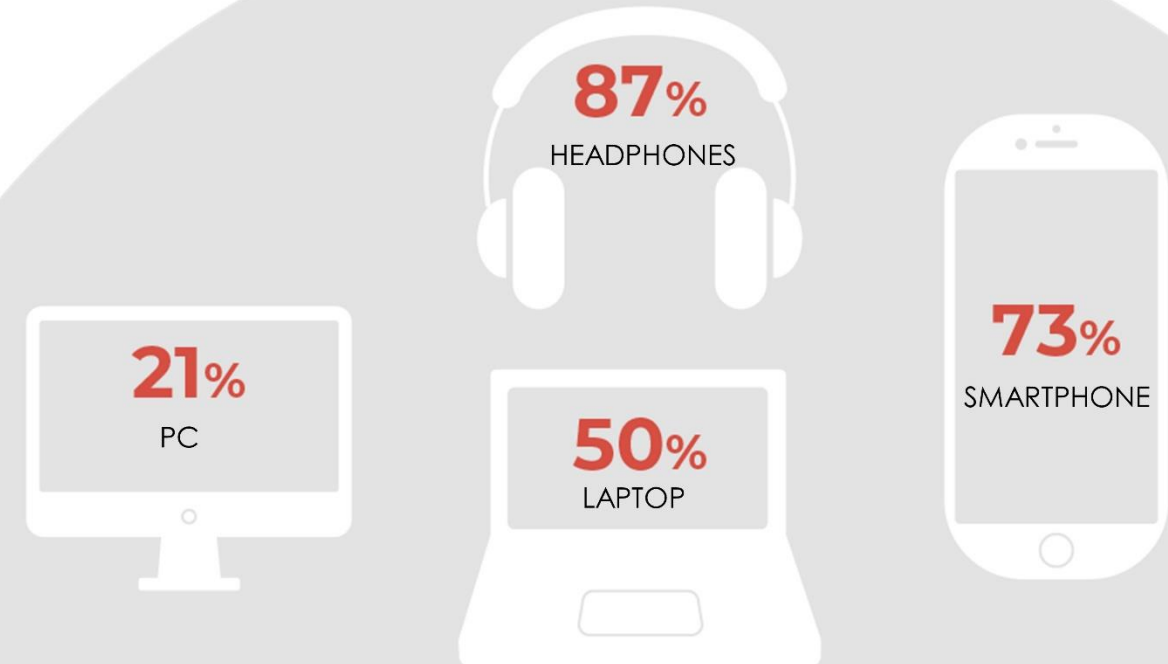
MEDIA PERCEPTION



PLACES AND MOMENTS



DEVICES USED



SHOW ME
THE
MONEY!

READY TO PAY FOR THE CONTENT

uses paid podcasts
sites/apps

18%

willing to pay
for podcasts

28%

ADVERTISING ACCEPTANCE

75%

podcast sponsored by a brand

73%

brand recommendation by a host

71%

podcast created by a brand

40%

spots

PODCASTS PROMOTION – WHAT WE DID SO FAR AS TANDEM MEDIA

B2B campaign - benefits of digital+FM
- ads/mailling/gadgets

1

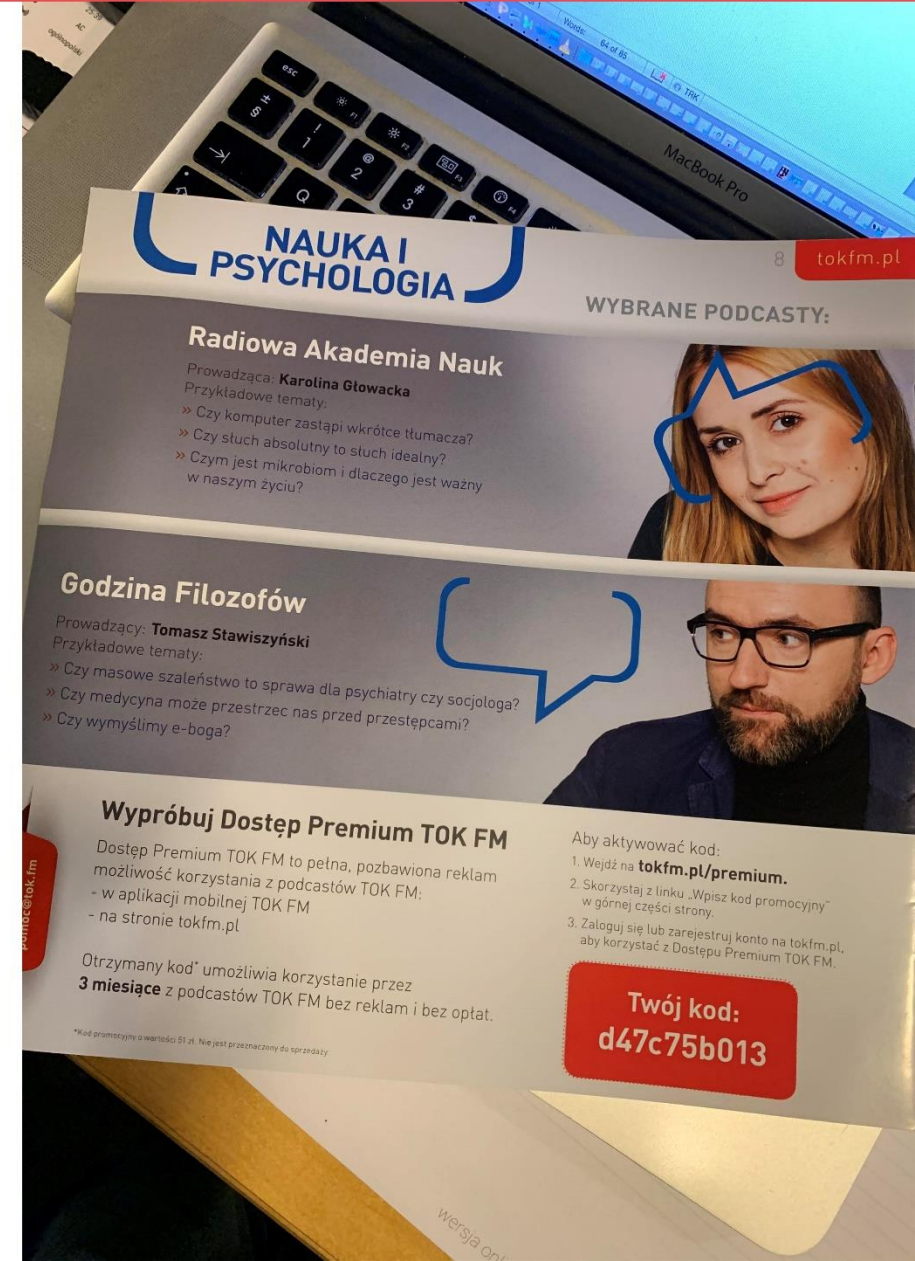
free access codes to TOK FM podcast library

press releases

presentations on marketing conferences

1st tour of presentations in media houses:
podcast trends in Western World

2



PODCASTS PROMOTION – WHAT WE DID SO FAR AS TANDEM MEDIA

podcasts listeners RESEARCH

3

launch of research: conference (MMP Insight Day)

press releases reporting results

articles/podcasts in media/marketing/mainstream titles

insert in Media & Marketing Polska magazine



**Czas na
podcasty!**

Raport z badania polskich odbiorców podcastów **2019**

PODCASTS PROMOTION – WHAT WE ARE DOING RIGHT NOW AS TANDEM MEDIA

2nd tour of presentations in media houses and marketers:
telling about Polish podcast listener

building the independent podcasters network
– Tandem Media as a broker

offering podcasts made by other Agora stations
– Złote Przeboje and Rock Radio

the very first media and marketing industry podcast
created jointly by Tandem Media & Marketing Polska
magazine – as a next step industry medium

a new podcast listeners research in summer 2020

4



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THANKS FOR LISTENING!
HAVE A NICE FLIGHT BACK HOME!