

The Canadian Podcast Listener 2019

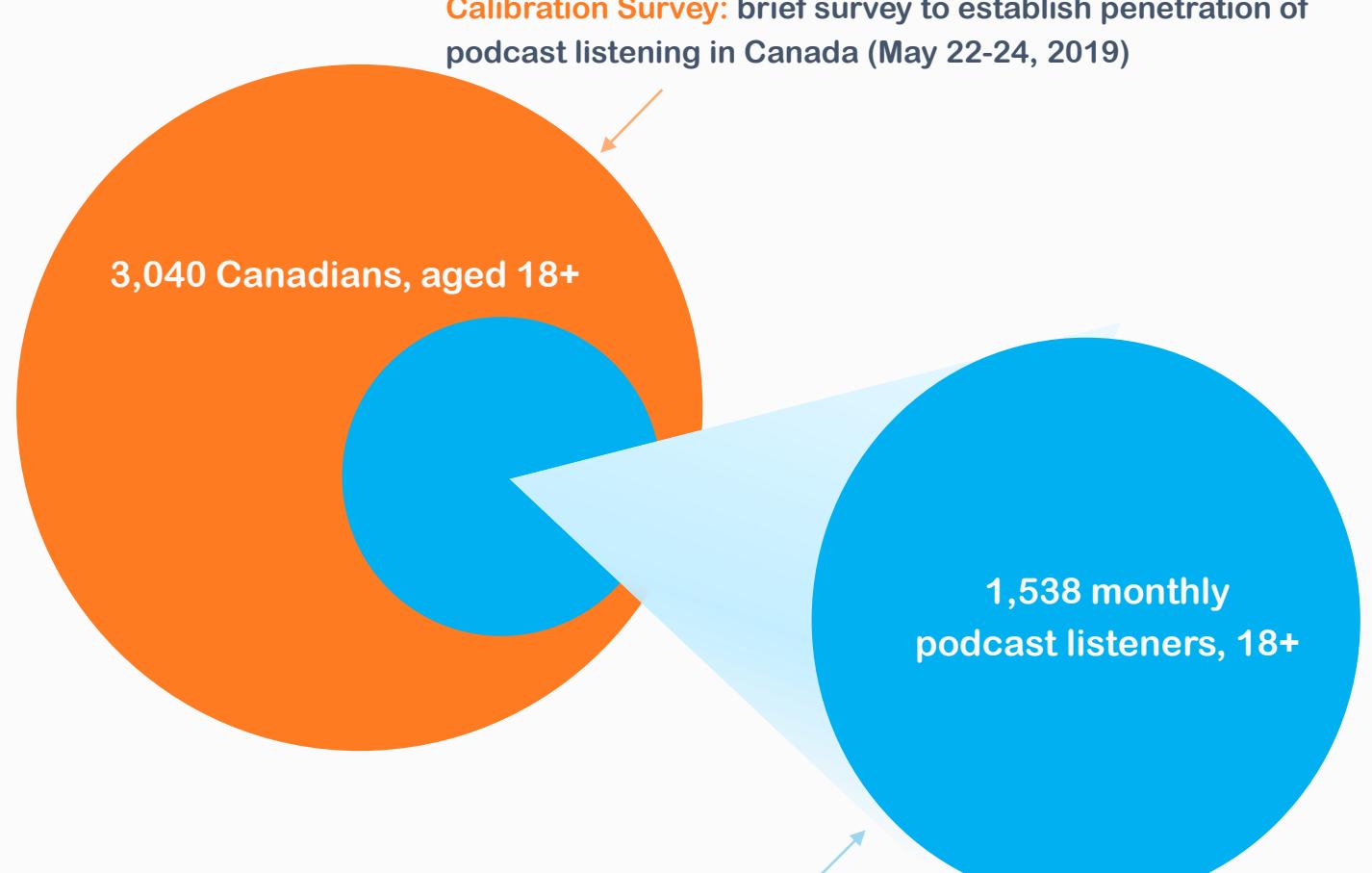
Summary Report





Study Design

TWO SEPARATE ONLINE SURVEY COMPONENTS:



Survey invites sent to representative sample of online Canadians on MARU Voice Canada

Podcast Landscape in Canada

A photograph of a young man wearing over-ear headphones, looking down at his smartphone which he is holding in his hands. He is wearing a dark long-sleeved shirt. The background is blurred, showing bokeh lights from what appears to be a city street at night.

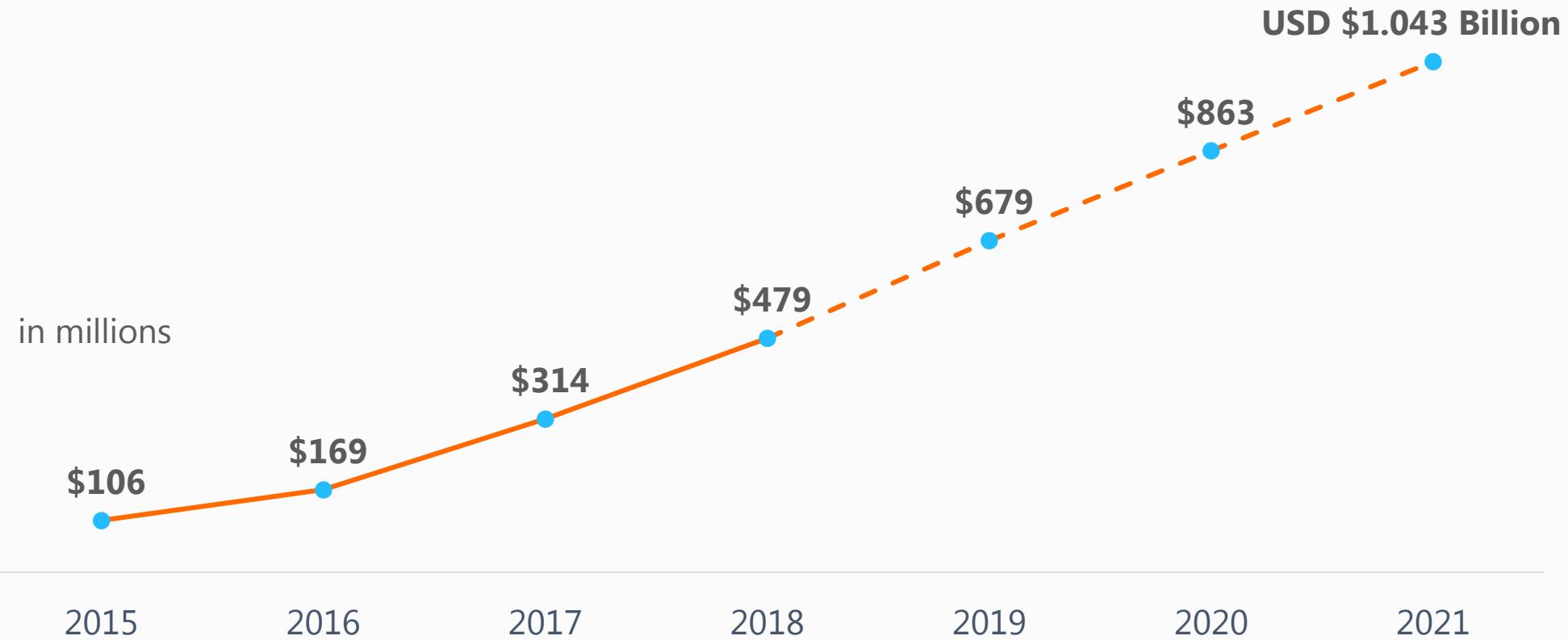
Following global trends, increased activity in Canadian podcasting shows promise at closing the consumption > monetization gap.

Meanwhile, podcast listening continues to grow incrementally among an affluent, increasingly hard-to-reach on demand audience.



Podcast Ad Revenue Growth in the U.S.

As the podcast industry matured in the past 3 years, ad revenue from podcasting nearly tripled, and is estimated to exceed \$1 billion in 2021.



Source: FY 2018 Podcast Ad Revenue Study, IAB and PwC June 2019

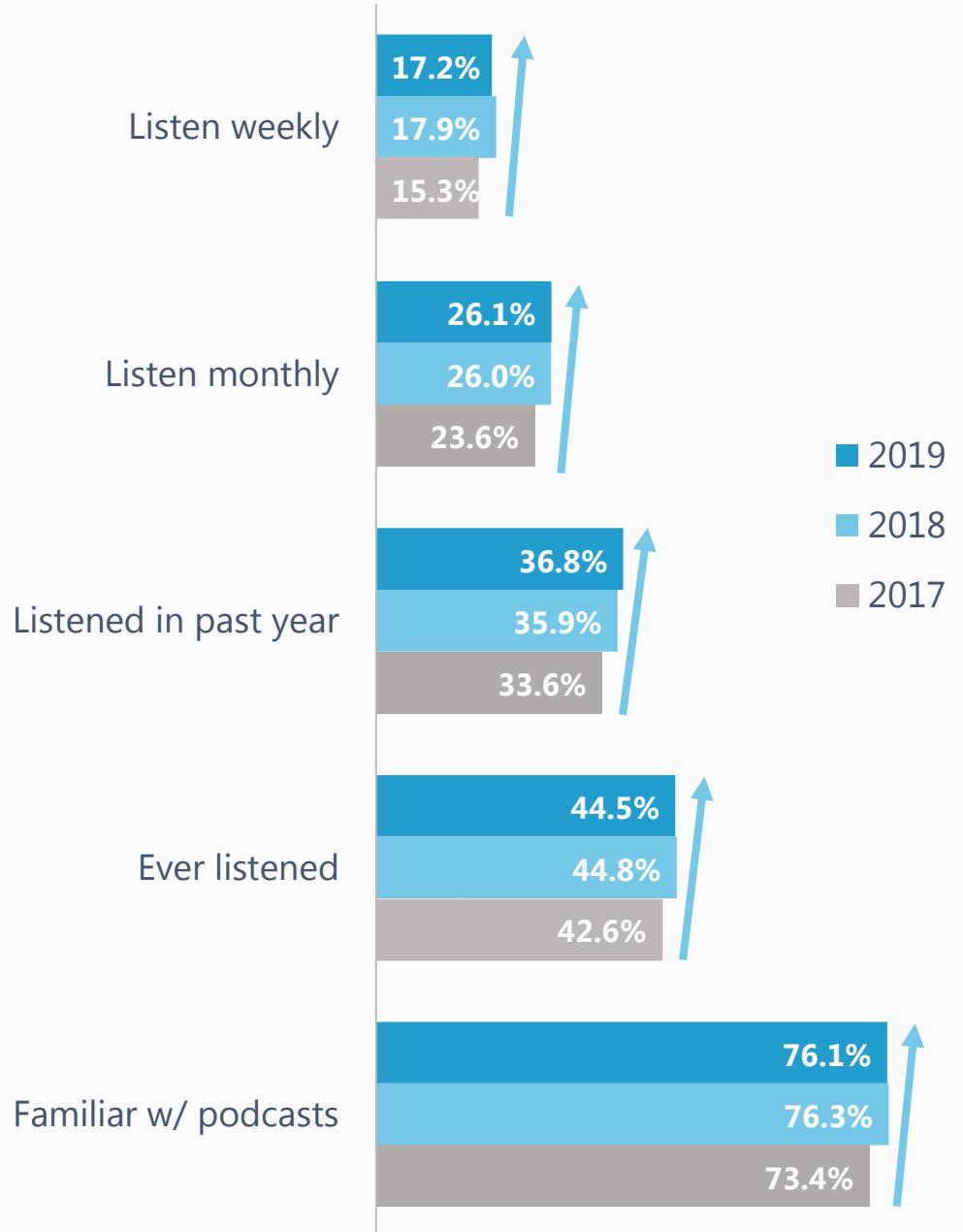
2015-2018 revenues based on self-reported advertising revenues from participating podcast companies, extrapolated to total market estimate

*2019-2021 revenues are a forecast based upon self reported estimates and projected market sizing.



Podcast listening continues to show incremental growth.

Nearly 11 million Canadian adults (37% of the 18+ population) have listened to podcasts in the past year. More than 13 million (45%) have listened at some point.



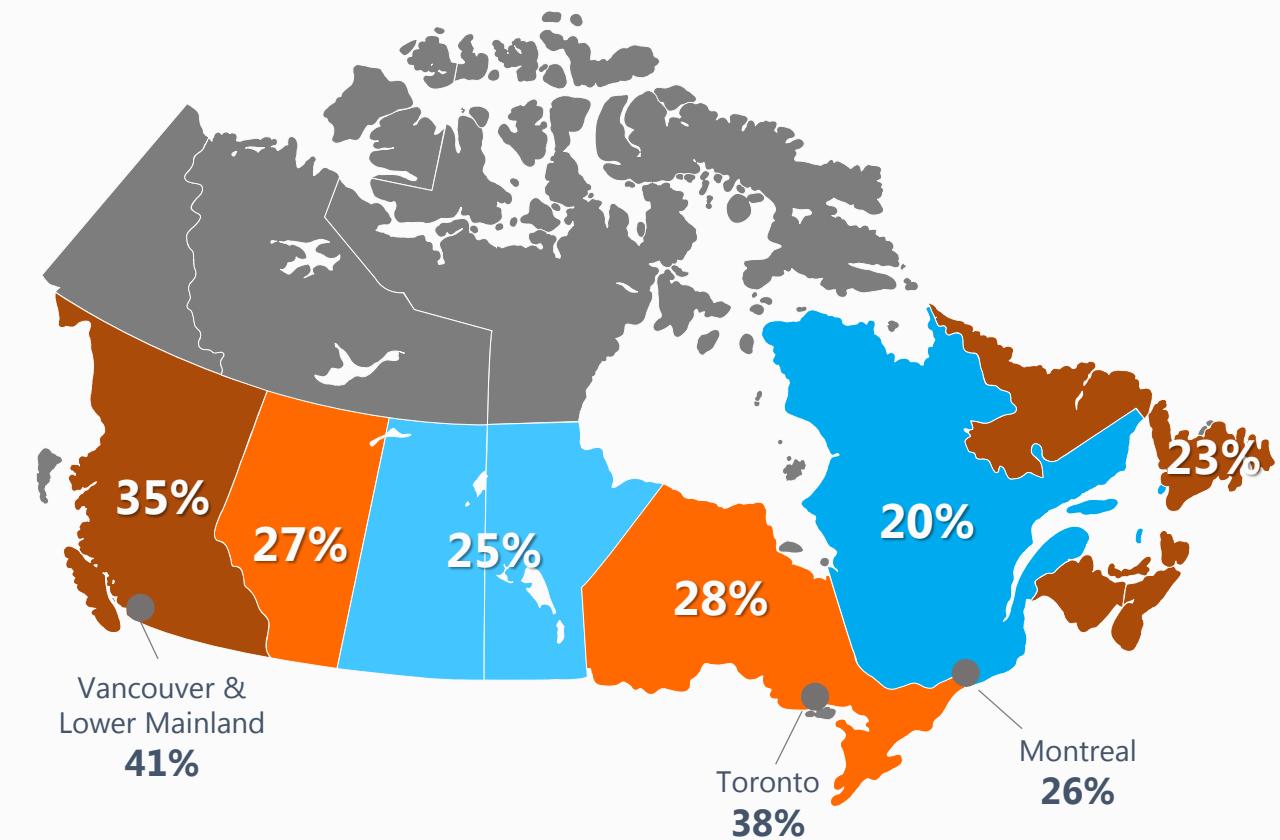
Source: The Canadian Podcast Listener 2019 – Calibration Study
Which of the following best describes your most recent experience with podcasts / How often do you listen to podcasts?
Base: Canadians, aged 18+ (Jul/Aug 17: n=2,518; May 18: n=3,118; May 2019: n=3,040)



% in Each Region Who Listen to Podcasts Monthly

Podcast listening in Canada continues to be most popular in urban areas.

British Columbia has the highest concentration of monthly podcast listeners, followed by Ontario and Alberta.



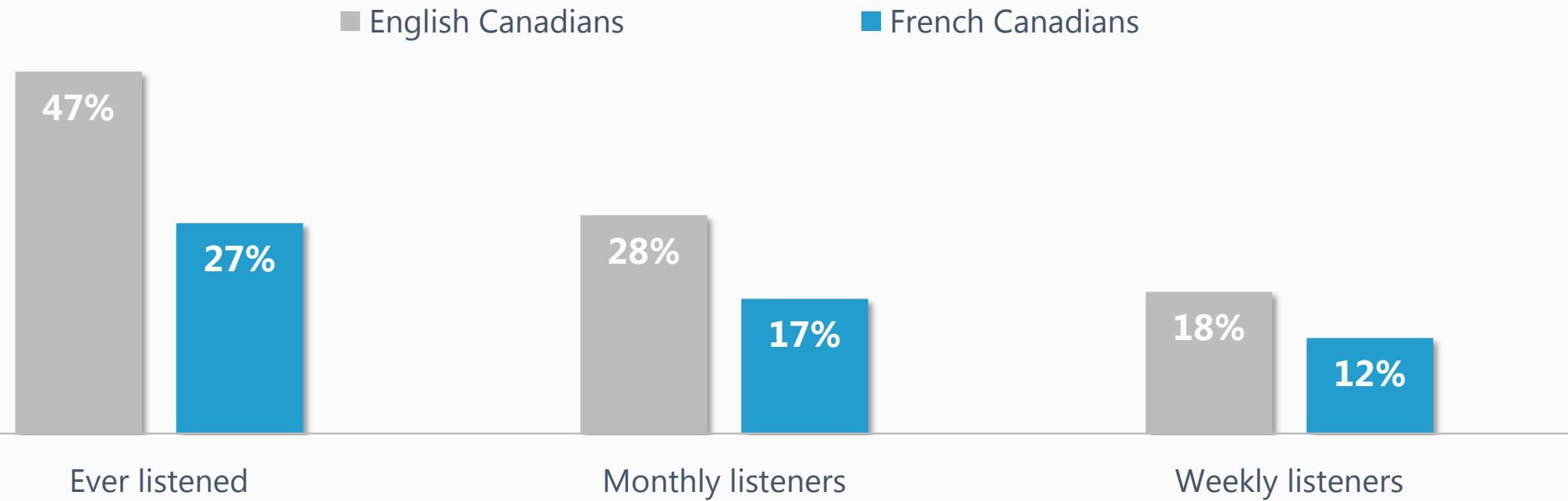
Source: The Canadian Podcast Listener 2019 – Calibration Study

Which of the following best describes your most recent experience with podcasts / How often do you listen to podcasts? (Monthly = Listened in past year & listen 1+x/month)

Base: Canadians, aged 18+ (n=3,040)



French Canadians are much less likely than English Canadians to be podcast listeners.



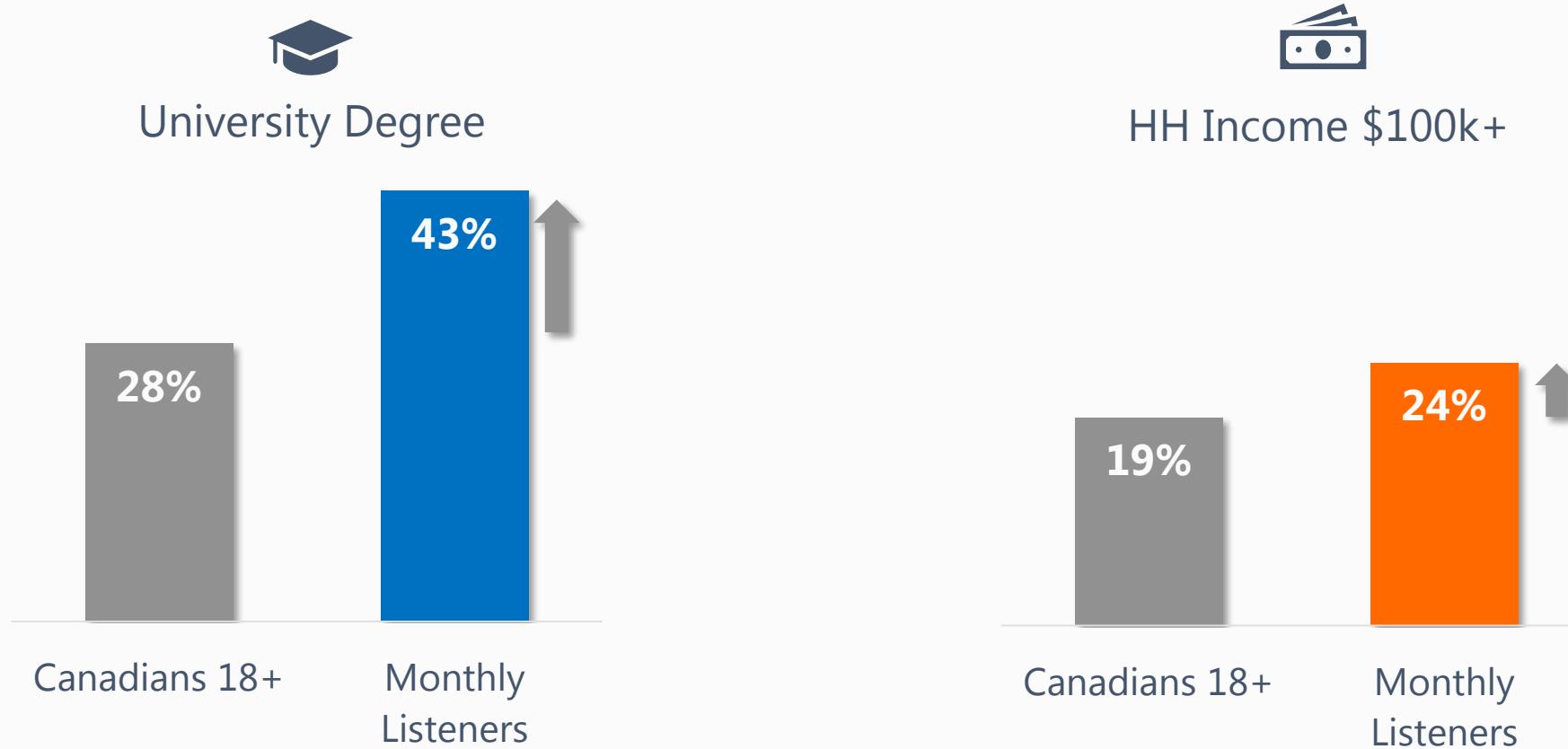
Source: The Canadian Podcast Listener 2019 – Calibration study

Which of the following best describes your most recent experience with podcasts / How often do you listen to podcasts?

Base: English Canadians, aged 18+ (n=2,477); French Canadians, aged 18+ (n=563)



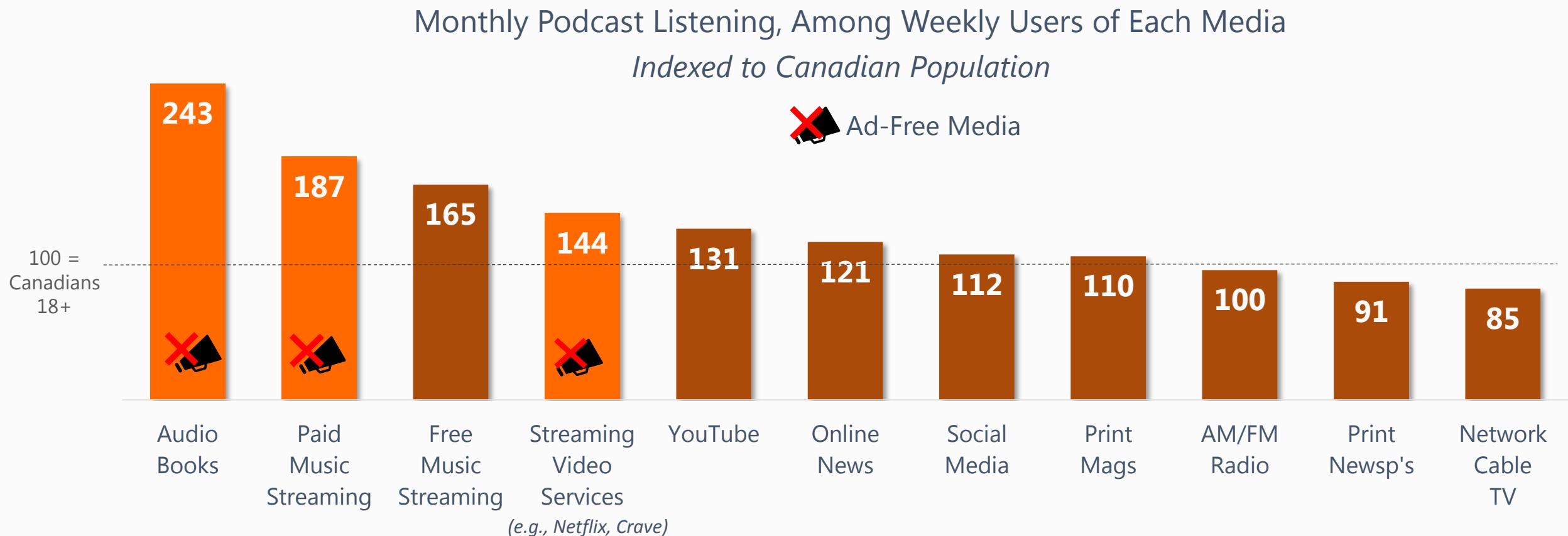
Podcast listeners represent an educated and affluent audience.



Source: The Canadian Podcast Listener 2019 – Calibration Study
Base: Canadians, aged 18+, (n=3,040), monthly podcast listeners (n=804)

Podcasts reach consumers of on-demand media.

Podcasts over-index among users of on-demand platforms inaccessible to advertisers.



Source: The Canadian Podcast Listener 2019 – Calibration Study

How often do you listen to audio podcasts?

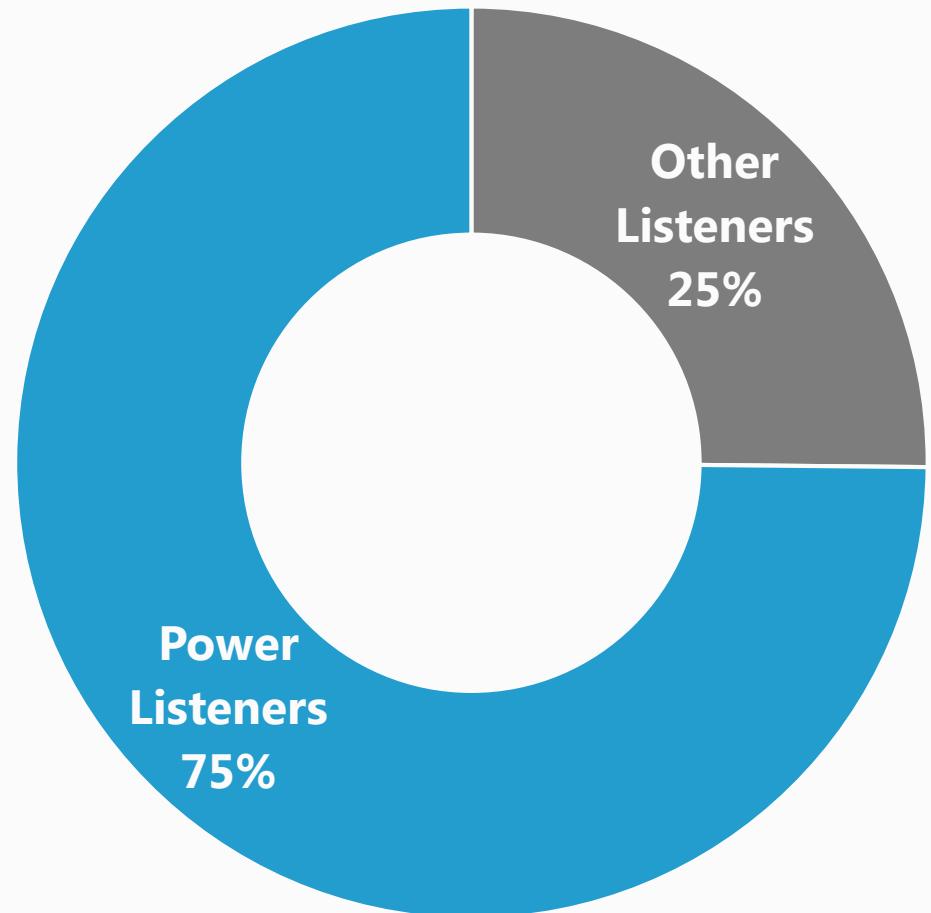
Base: Canadians, aged 18+, weekly users of Audiobooks (n=298), Paid Music Streaming (n=762), Free Music Streaming (n=1,006), Streaming Video Services (n=1,760), YouTube (n=2,043), Online News (n=2,146), Social Media (n=2,457), Print Magazines (n=695), AM/FM (n=2,392), Print Newspapers (n=1,370), Network/Cable TV (2,319)



Power Listeners are responsible for most weekly podcast listening.

The 37% of weekly podcast listeners who are Power Listeners account for three-quarters of the total weekly podcast hours.

Distribution of Total Weekly Podcast Hours



Source: The Canadian Podcast Listener 2019
How much time would you say you spend listening to podcasts in a typical week?
Base: Monthly podcast listeners, aged 18+ (n=1,538)

Platforms

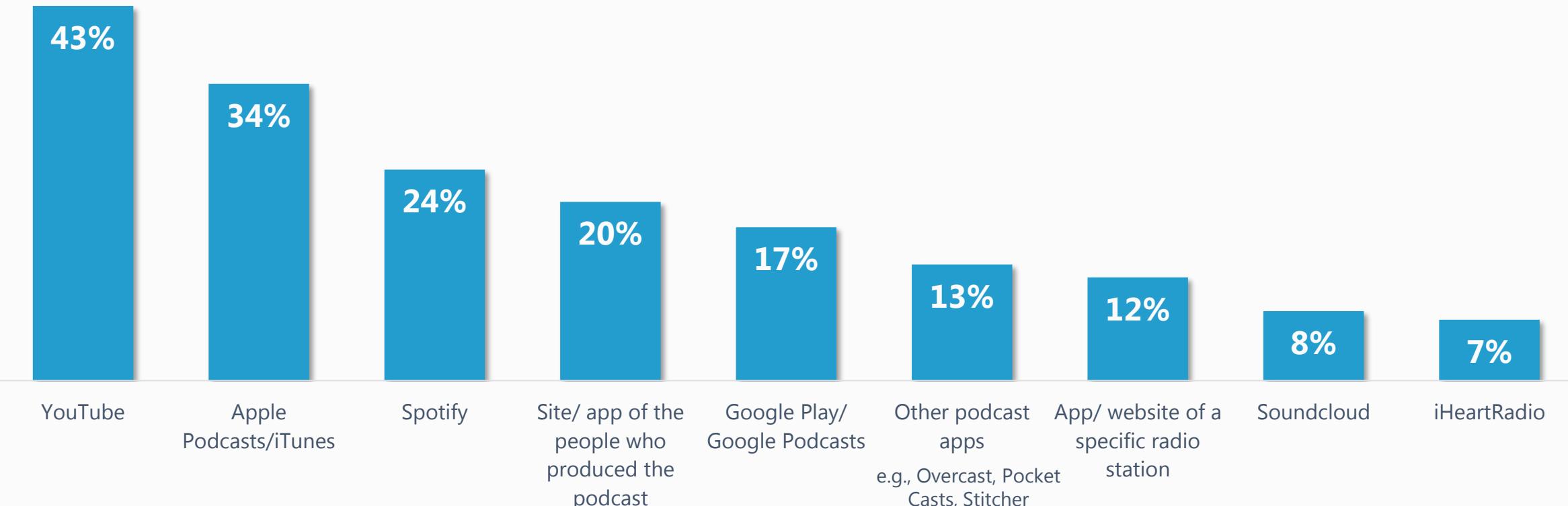
Podcast listening is moving beyond the iTunes/ Apple Podcast platform.

Other go-to destinations for audio and entertainment such as Spotify and YouTube are being used to listen to podcasts.

Listeners access their podcasts from a wide range of platforms.

Though still a leading platform, Apple Podcasts/iTunes is no longer the only game in town for accessing podcasts.

Platforms Used to Access Podcasts in Past Year



Source: The Canadian Podcast Listener 2019

Which of these platforms have you used in the past year to access podcasts?

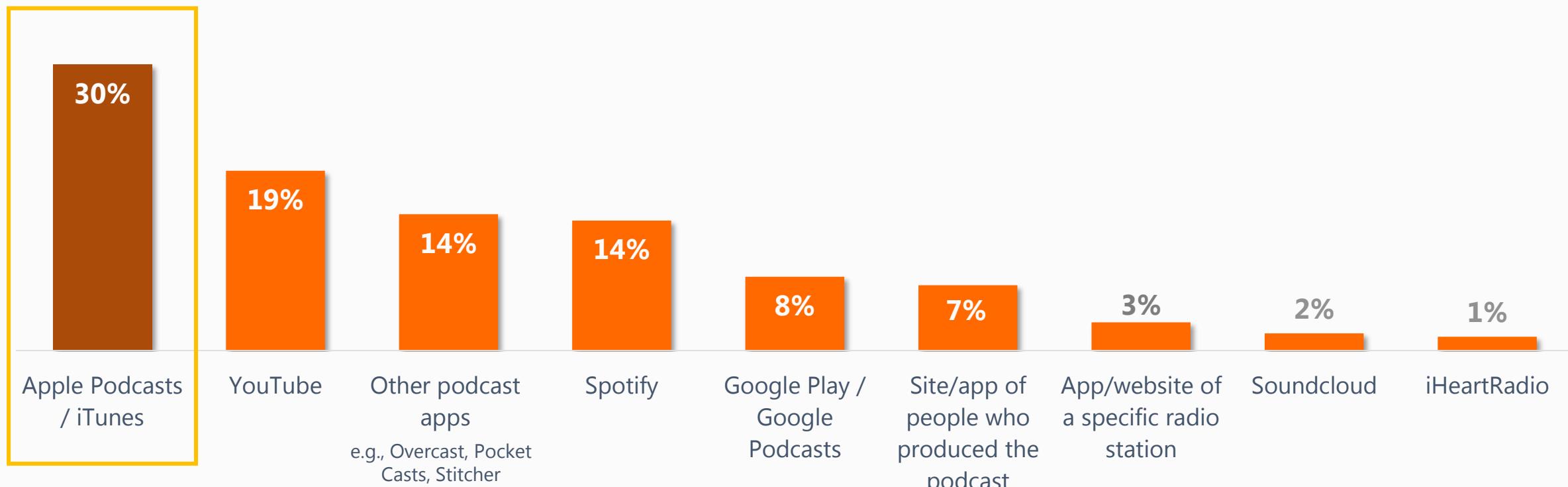
Base: Monthly podcast listeners, aged 18+ (n=1,538)



Power Listeners are especially likely to access Apple Podcasts most often.

Apple remains the clear leader as platform accessed most often among Power Listeners. Other podcast apps (e.g., Overcast, Pocket Casts, Stitcher) also move up among Power Listeners, from 9 to 14%.

Platforms Used to Access Podcasts Most Often
Among Power Listeners (5+ hrs/wk)



Source: The Canadian Podcast Listener 2019

Which of those platforms do you use most often to listen to podcasts?

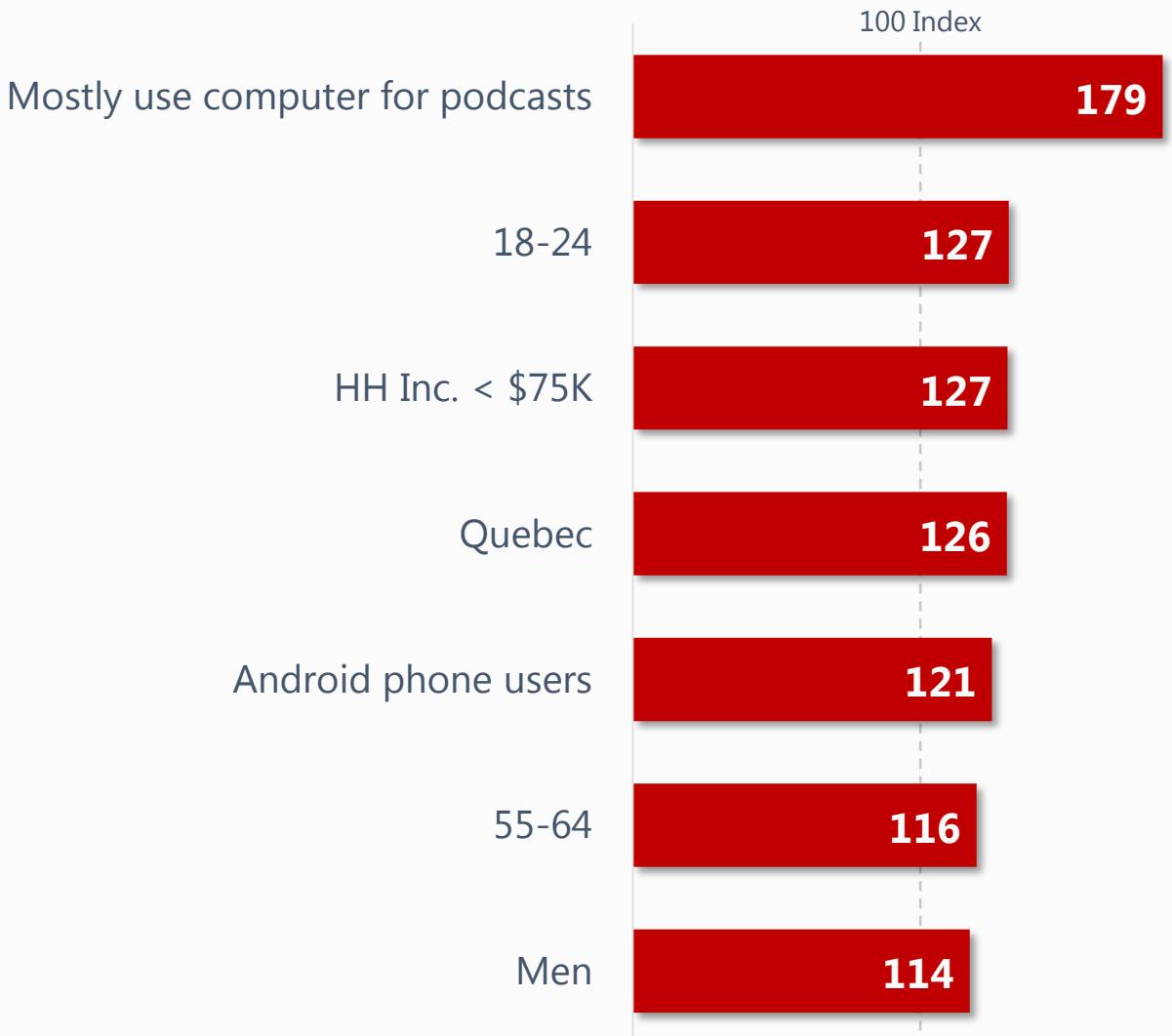
Base: Monthly podcast listeners, aged 18+, listen to 5+ hours/week (n=385)



Who goes to YouTube most often to access podcasts?

Use of YouTube is, to a large extent, device-driven. Podcast listeners who mainly rely on computers for podcasts are particularly likely to say they go to YouTube most often for podcasts.

Use YouTube Most Often
Indexed to the average monthly podcast listener



Source: The Canadian Podcast Listener 2019

Which of those platforms do you use most often to listen to podcasts?

Base: Monthly podcast listeners, aged 18+ (n=1,538)

The Canadian Podcast Chart

ART19

The Canadian Podcast Listener study is unique in that it asks listeners to name the podcasts they listen to.

[The Canadian Podcast Chart](#) offers insights into what people actually listen to as opposed to what they download—and how these podcasts vary by different types of listeners.

Many thanks to our partners at ART19 whose data gurus provide the heavy lifting to power these insights.

How Canada's Most Listened to Podcasts Were Identified

Monthly podcast listeners were asked to name up to 10 podcasts listened to in the past month, plus their favourite podcast from the podcasts listened to in the past month.

Our partners at **ART19** match these responses to an Apple Podcasts list of 50,000+ podcasts downloaded in Canada, allowing the study to bring in metadata about the genres and publishers of the different podcasts that Canadians listen to.



Source: The Canadian Podcast Listener 2019
Please list up to 10 podcasts you remember listening to in the past month.
Base: Monthly podcast listeners, aged 18+ (n=1,538)

The Long Tail of **The Canadian Podcast Chart**

- 2,411 *unique* podcasts were named by our sample of 1,538 monthly podcast listeners. This represents only a fraction of the 700,000+ podcasts listed in Apple Podcasts.
- Of the podcasts named, only 646 (just 27%) received more than a single mention.

Rising Stars for 2019

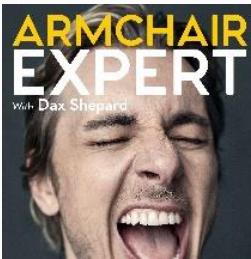
Many of the top podcasts from 2018 also landed at the top of the list in 2019. But a few stood out as being much more popular this year than last.



Source: The Canadian Podcast Listener 2019
Please list up to 10 podcasts you remember listening to in the past month.
Base: Monthly podcast listeners, aged 18+ (n=1,538)

2018 Rank

2019 Rank



#100

#5



#104

#11



n/a

#18



#328

#20

The Canadian Podcast Chart ta compiled in partnership with ART19

Top 3 Past Month Podcasts, by Primary Listening Platform

Apple Podcasts Primaries		YouTube Primaries		Spotify Primaries	
1	This American Life	6.0%	1	The Joe Rogan Experience	21.4%
2	The Joe Rogan Experience	5.1%	2	Mike Ward Sous Écoute	2.5%
3	My Favorite Murder	4.1%	3	H3 Podcast	2.5%
				1	Stuff You Should Know 6.1%
				2	Crime Junkie 5.2%
				3	The Joe Rogan Experience 4.5%

Source: The Canadian Podcast Listener 2019

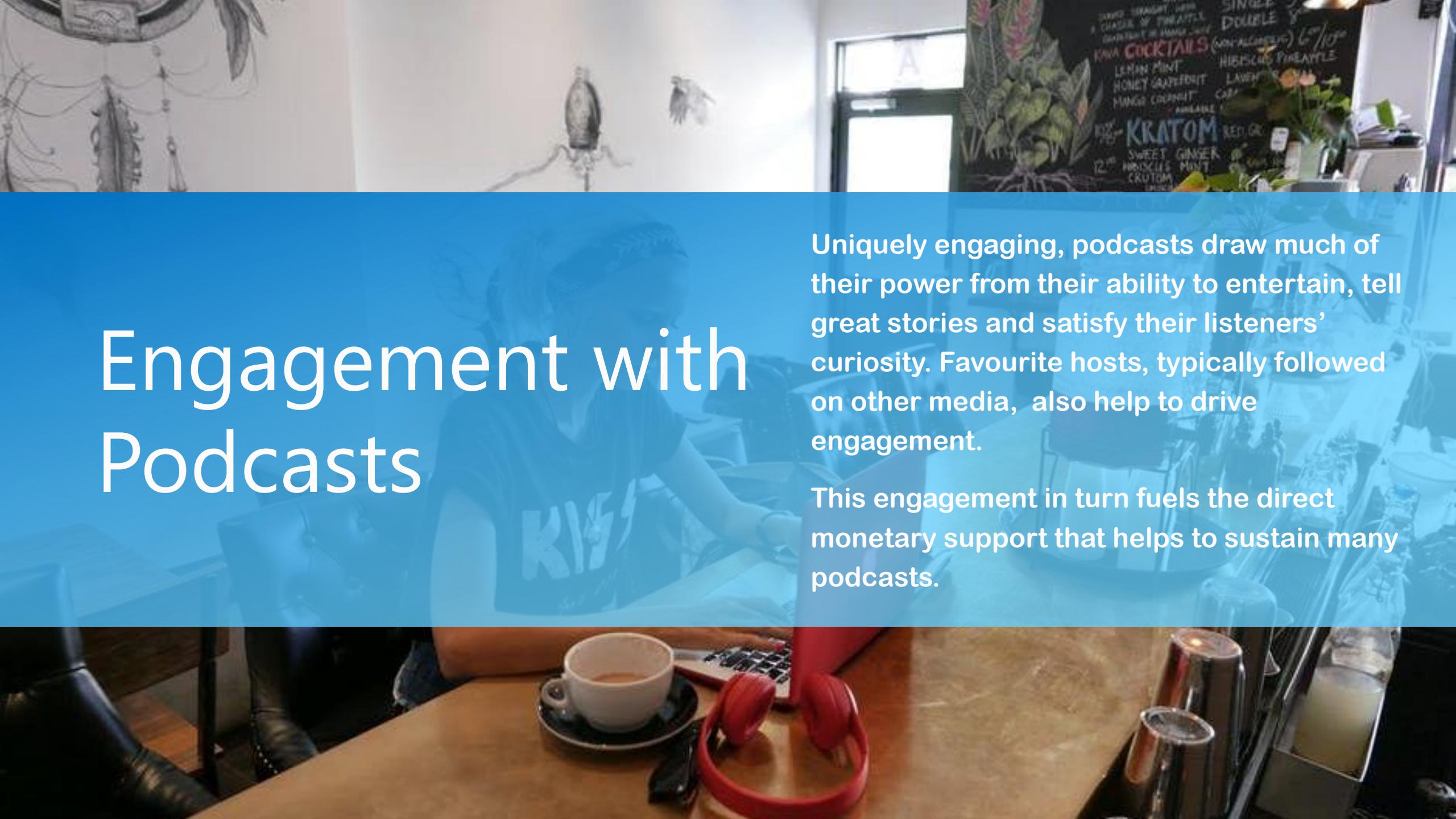
Please list up to 10 podcasts you remember listening to in the past month.

Base: Monthly podcast listeners, aged 18+ who primarily listen to new episodes (n=744), binge multiple episodes (n=352), cherry-pick episodes (n=404)



The Canadian Podcast Chart ta compiled in partnership with ART19

Engagement with Podcasts

A photograph showing a person from the side, wearing a blue t-shirt with the word "KAVI" printed on it. They are sitting at a wooden table, looking down at a laptop. On the table next to them is a white cup of coffee on a saucer. The background is slightly blurred, showing what appears to be a bar or cafe environment.

Uniquely engaging, podcasts draw much of their power from their ability to entertain, tell great stories and satisfy their listeners' curiosity. Favourite hosts, typically followed on other media, also help to drive engagement.

This engagement in turn fuels the direct monetary support that helps to sustain many podcasts.

Hosts are a key source of engagement.

More than half of all podcast listeners (56%) say they have a favourite podcast host.

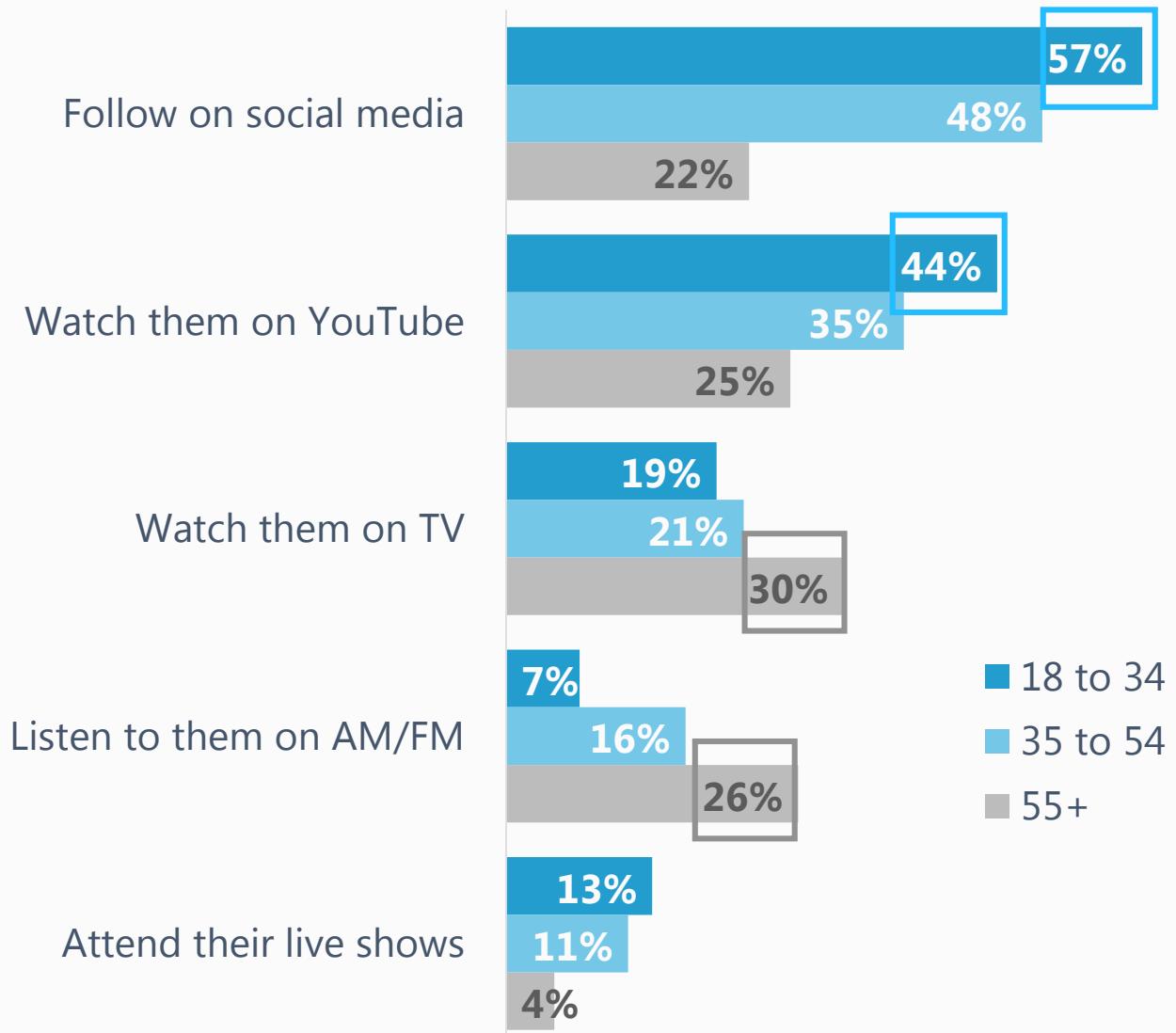
Most follow them on multiple platforms.

Source: The Canadian Podcast Listener 2019

For the next couple of questions, we'd like you to think of a favourite podcast host-someone you always look forward to hearing. Still thinking of that favourite host, do you also follow/watch/listen to them in any of the following ways?

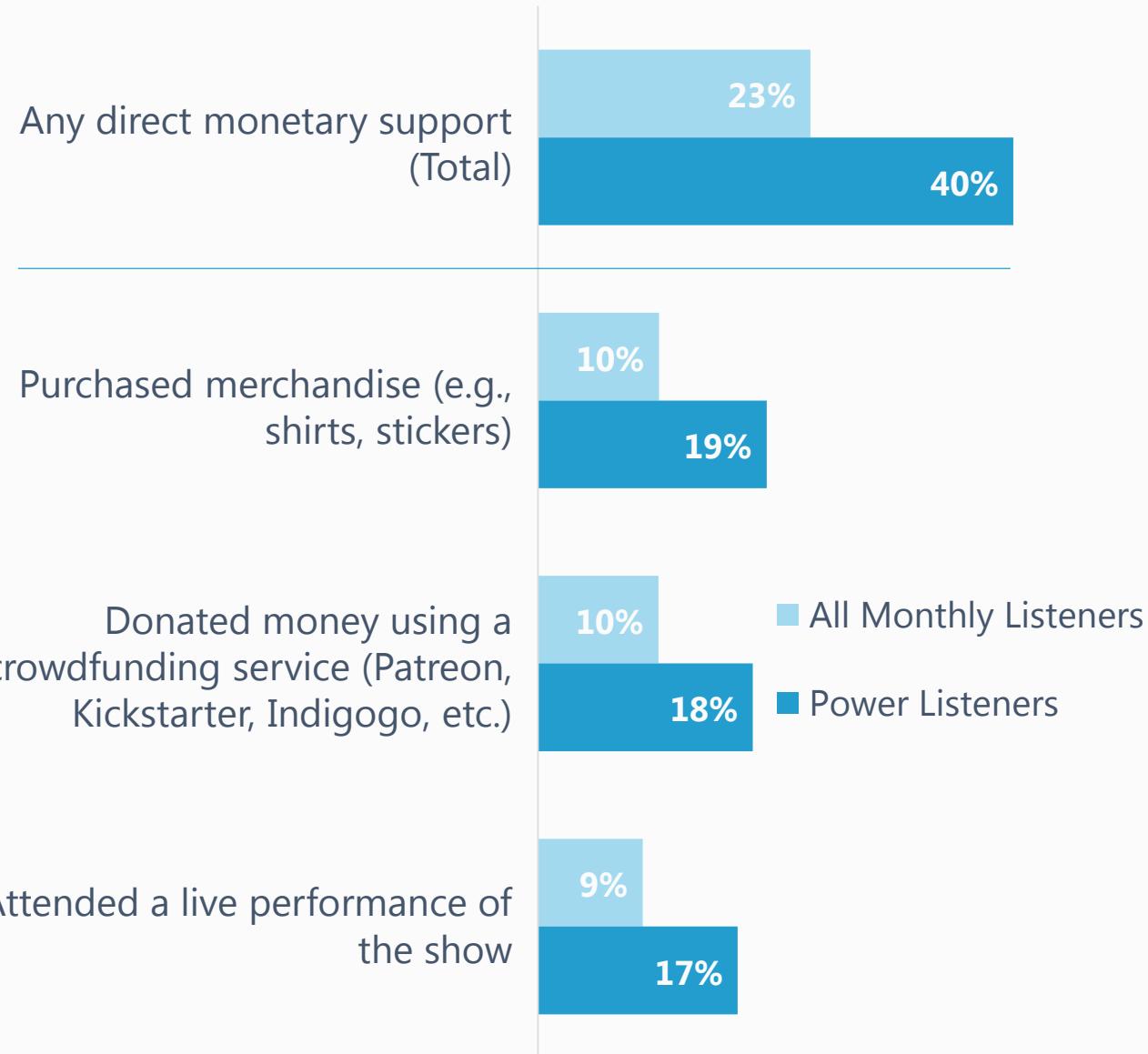
Base: Monthly podcast listeners, aged 18+ who have a favourite podcast host (n=836)

How do you follow/watch/listen to your favourite podcast host?



Nearly 1-in-4 podcast listeners have contributed monetary support to podcasts.

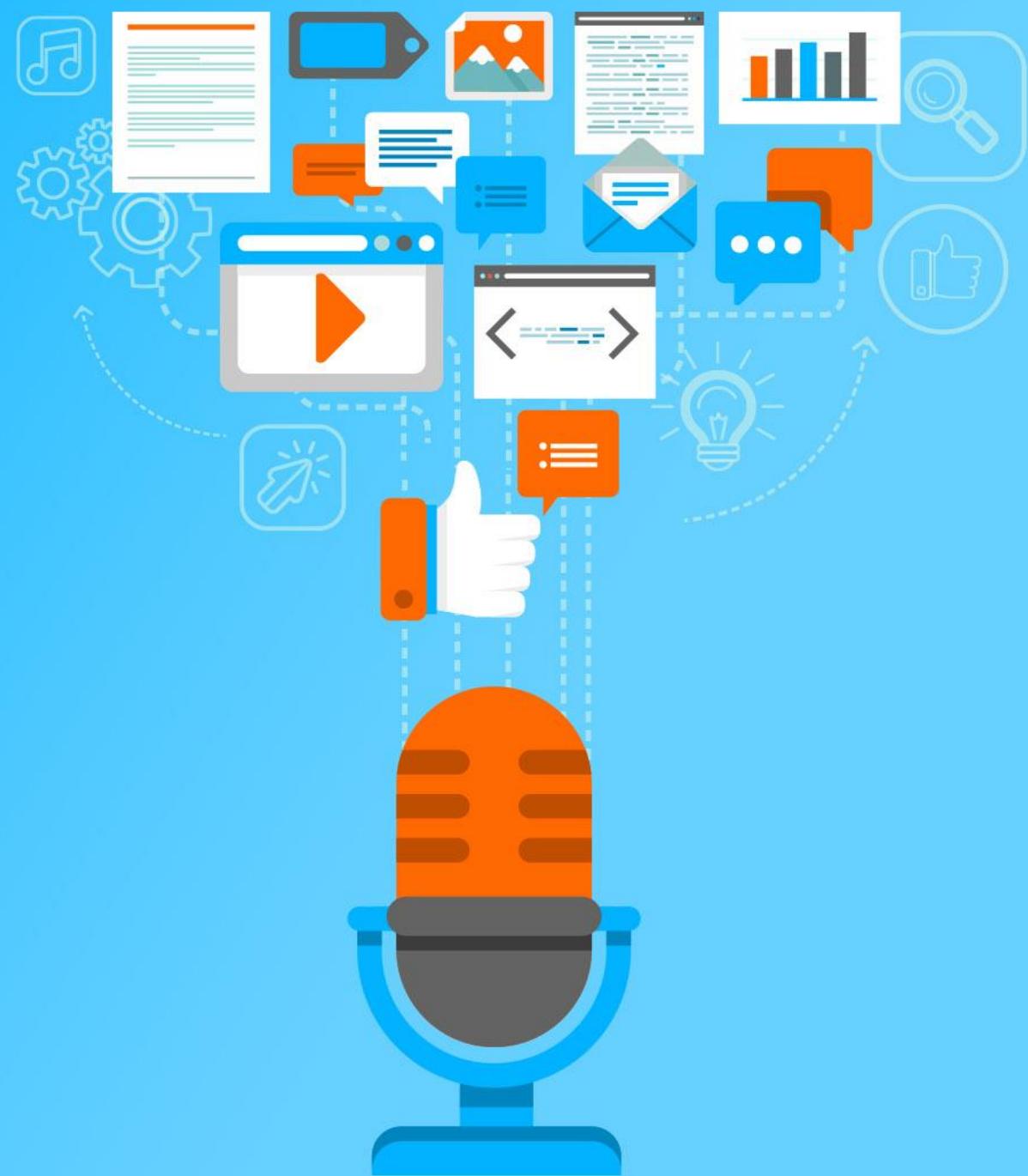
A total of 23% of podcast listeners—and 40% of power listeners—have provided direct monetary support to podcasts they listen to through crowdfunding, attending live events or buying merchandise.



Source: The Canadian Podcast Listener 2019

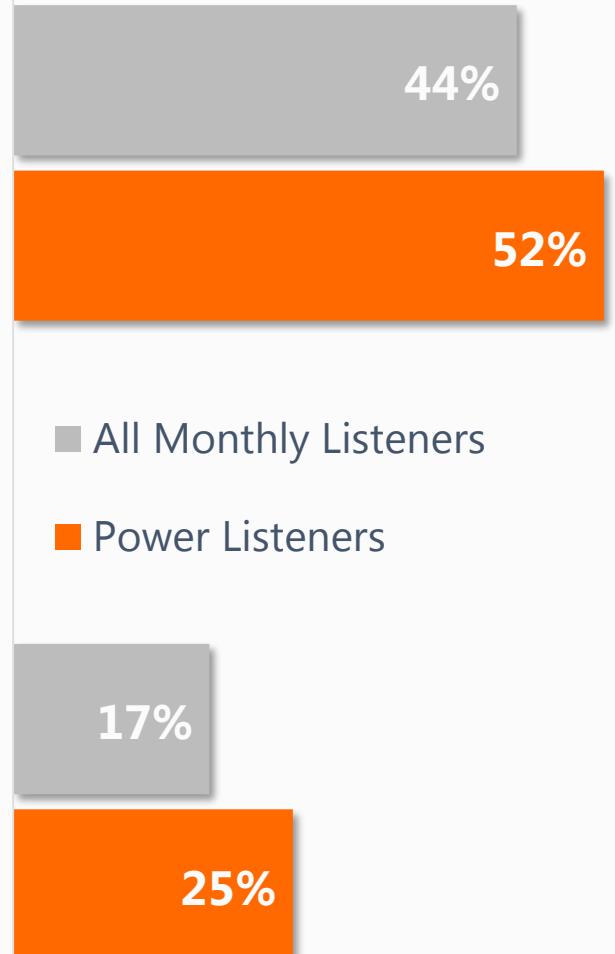
In which of the following ways have you supported any of the podcasts you listen to? Base: Monthly podcast listeners, aged 18+ (n=1,538) who listen 5+ hours/week (n=395)

Advertising



Engaged podcast listeners connect ads with support for their favourite podcasts.

I wouldn't mind a couple of extra ads per show so that my favourite podcasts can continue



Source: The Canadian Podcast Listener 2019

To what extent do you agree or disagree with the following statements about advertising in podcasts? (% "strongly agree" + % "agree")

Base: Monthly podcast listeners, aged 18+ who listen to podcasts with ads (n=1,411), who listen for 5+ hours/wk (n=385)



Podcast ads motivate action and build awareness.

Nearly 6-in-10 podcast listeners recall taking action as a result of podcast ads.

Podcast ads also build brands. Fully 1-in-4 say they found out about a product or service they hadn't heard of before on podcasts.

Source: The Canadian Podcast Listener 2019

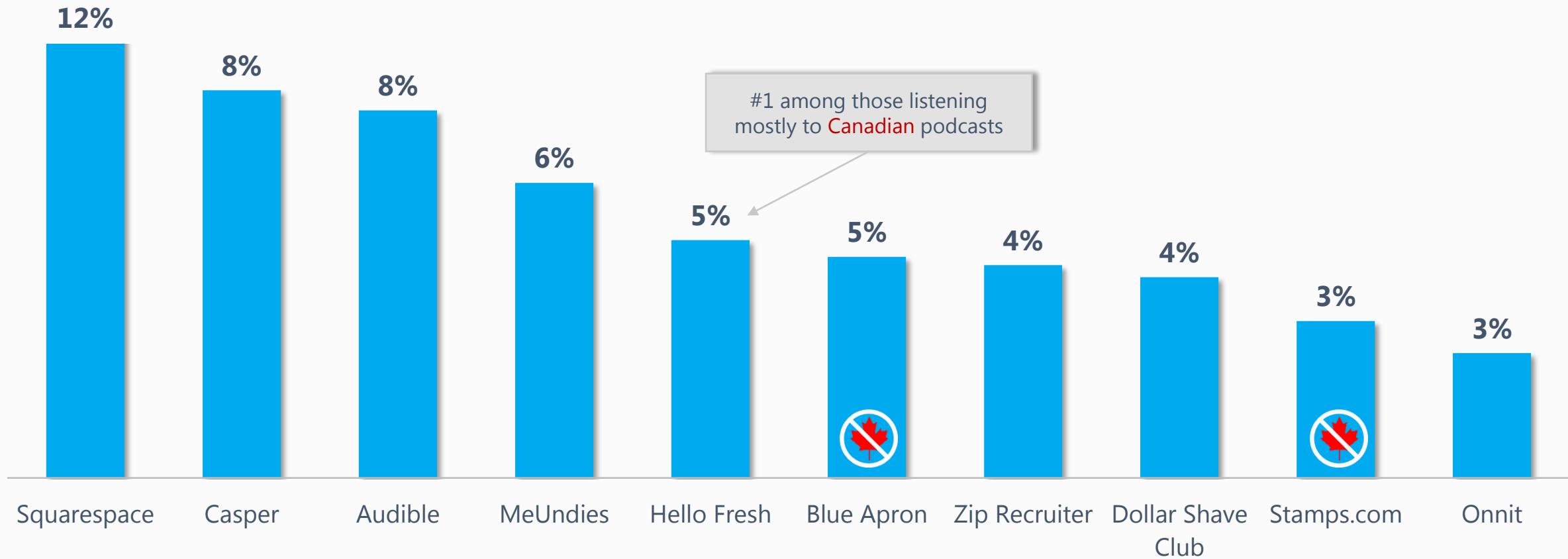
Have you ever taken any of the following actions after hearing a brand, product or service advertised on a podcast?

Base: Monthly podcast listeners, aged 18+ (n=1,538)



Brands, Products, Services Recalled from Podcast Ads

Squarespace remains the leader in top-of-mind advertisers among Canadian podcast listeners.



Source: The Canadian Podcast Listener 2019

Which 3 brands, products and services first come to mind when you think of the advertising on the podcasts you listen to? (excludes platform mentions, e.g., Apple, Spotify, YouTube)

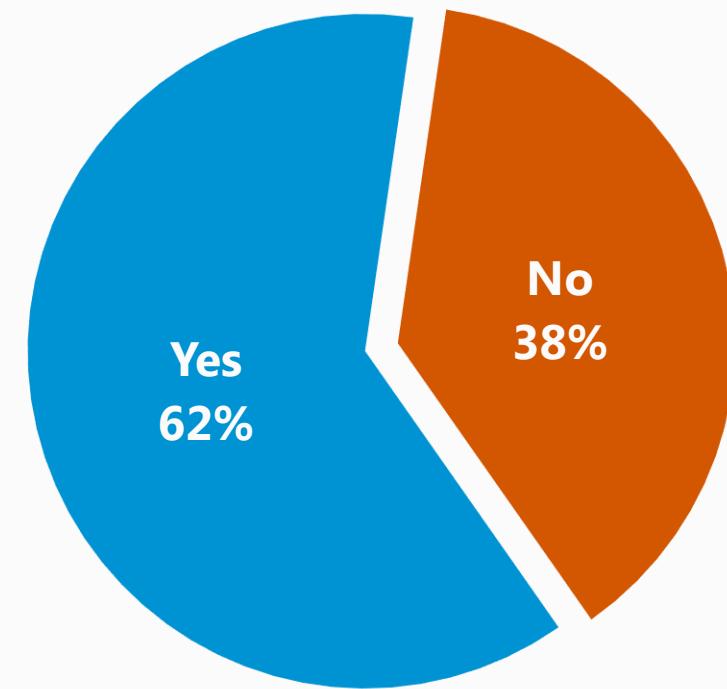
Base: Monthly podcast listeners, aged 18+, who named at least one advertiser (n=632)



Wasted Advertising?

More than 6-in-10 podcast listeners who have looked for info on products and services they heard on a podcast have come across products/services that aren't available in Canada.

"Have you ever tried to get more information on an ad you heard on a podcast only to find out that product or service isn't available in Canada?"



Source: The Canadian Podcast Listener 2019

Have you ever taken any of the following actions after hearing a brand, product or service advertised on a podcast?

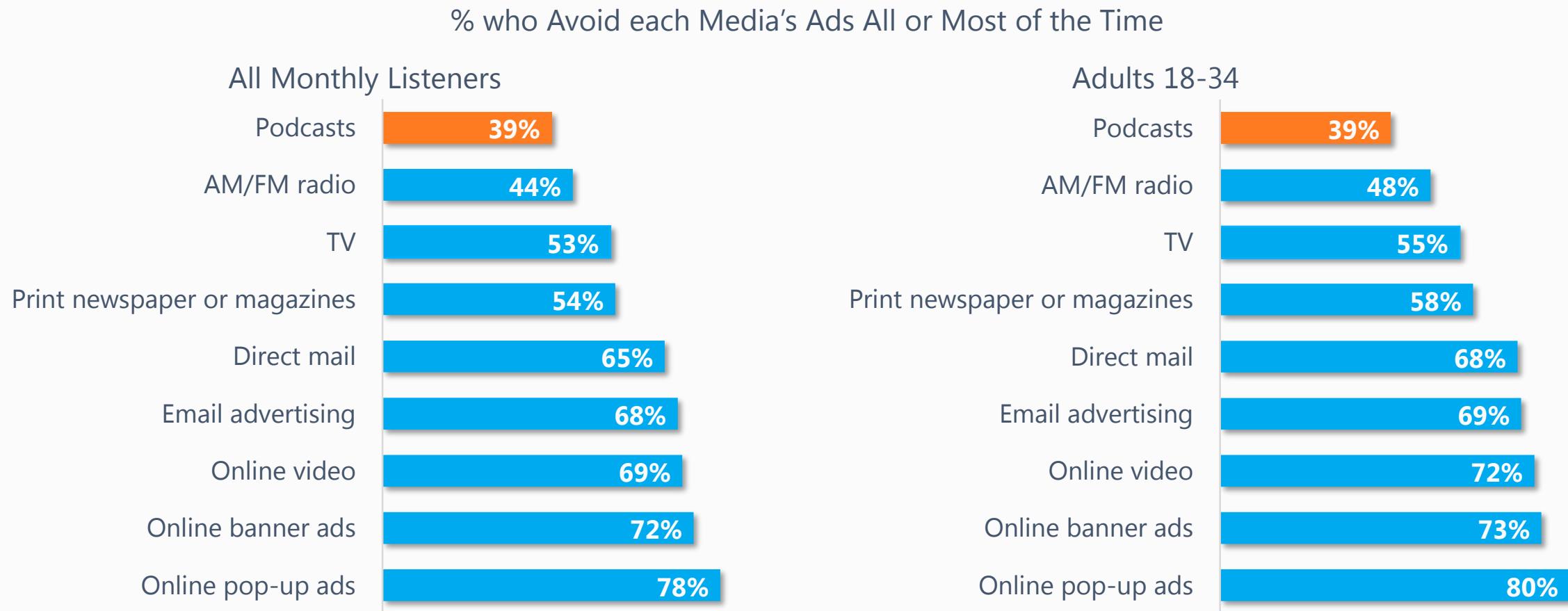
Have you ever tried to get more information on an ad you heard on a podcast only to find out that product or service isn't available in Canada?

Base: Monthly podcast listeners, aged 18+ (n=1,538) / Looked to get more information (n=456)



Podcast listeners less likely to avoid podcast ads

Podcast listeners are especially less likely to avoid podcast ads than ads on other digital media, despite similar targeting opportunities. Younger podcast listeners are more likely to avoid all types of ads... except those in podcasts.



Source: The Canadian Podcast Listener 2019

When you come across ads in each of the following places, how often do you actively avoid those ads by skipping, blocking, tuning out, turning away, throwing away or otherwise avoiding the ad?

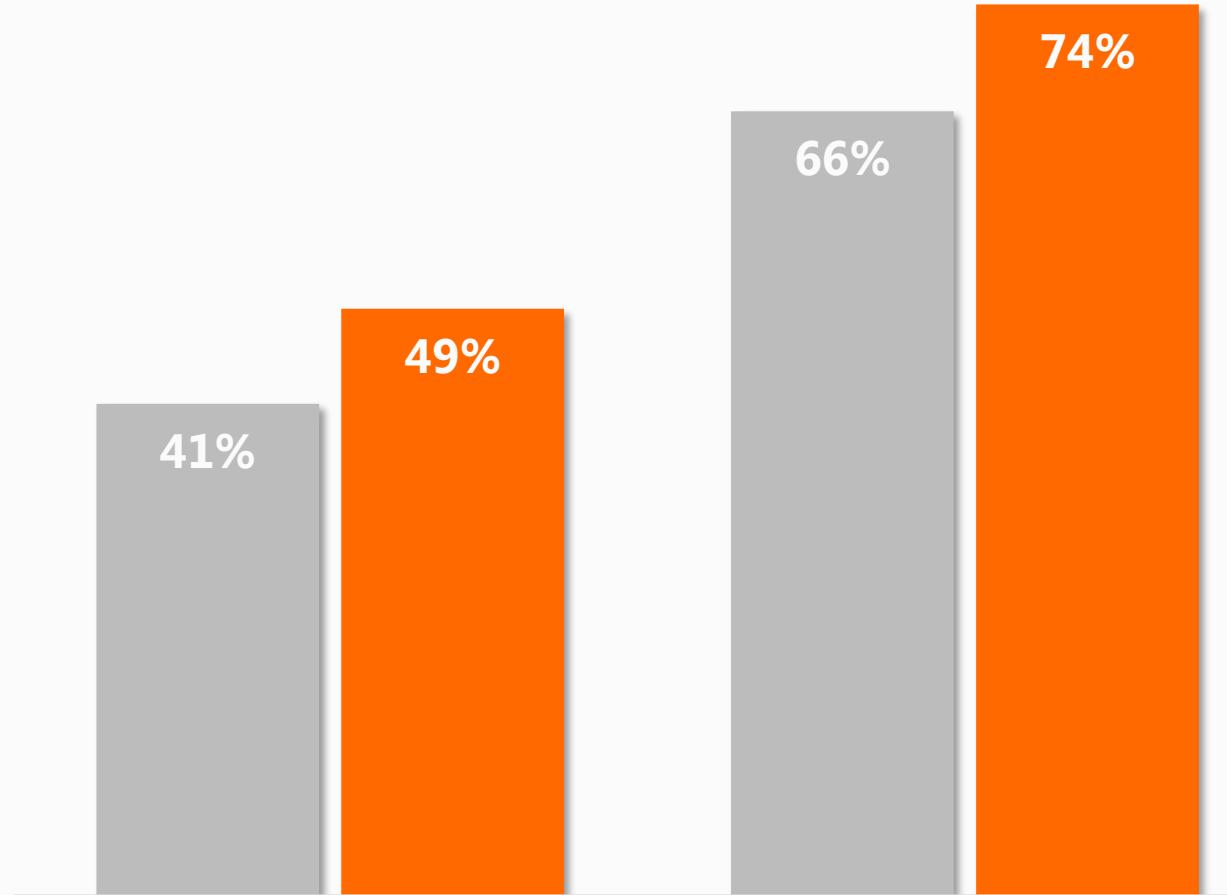
Base: Monthly podcast listeners, aged who listen to podcasts with ads, 18+ (n=1,411), 18-34 (n=656)



Podcast listeners see value in a host's connection to the ad.

■ All Monthly Listeners

■ Power Listeners



Source: The Canadian Podcast Listener 2019

To what extent do you agree or disagree with the following statements about advertising in podcasts? (% "strongly agree" + % "agree")
Base: Monthly podcast listeners, aged 18+ who listen to podcasts with ads (n=1,411), who listen for 5+ hours/wk (n=385)



Takeaways

- Podcast listening in Canada continues to grow incrementally. Nearly 11 million adults have listened in the past year—an audience still largely untapped by Canadian advertisers.
- Listening in French Canada lags well behind that of English Canada. Lack of French content keeps listening levels lower.
- Podcast platforms are shifting, with more listeners living outside iTunes/Apple Podcasts. While Apple still leads among the Power Listeners who account for most of the time spent with podcasts, many listeners use their go-to entertainment sources like YouTube and now Spotify.
- Podcasts provide a unique path for advertisers to reach today's on-demand media consumer. Podcasting taps into the same pool of content-hungry media consumers as paid music and video streaming, but uniquely podcasts offer a window for advertisers.
- The deeply engaging nature of podcast listening creates powerful opportunities. Podcast listeners follow their favourite hosts on other media; many provide their favourite shows direct monetary support; they are also open to ads that support their favourite shows.

Special appreciation to our primary sponsor for their support:

This Summary Report provides top-line findings from The Canadian Podcast Listener 2019.

Paid subscribers to the study receive an in-depth report on podcast platforms, discovery, listener behaviour, motivations and more. A subscription also opens the door to:

- **The Canadian Podcast Chart**—an online dashboard of 2,400+ podcasts listened to, including demo, genre and publisher
- **In-person presentation of the study**
- **Detailed data tables**
- **Sponsor credit on website and report**
- **Membership in the Client Advisory Board, helping to move Canada's podcast industry forward**

For more information, visit:

canadianpodcastlistener.ca



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