

The Canadian Podcast Listener 2019

Summary Report



With support from



THE PODCAST EXCHANGE



Study Design

TWO SEPARATE ONLINE SURVEY COMPONENTS:

Calibration Survey: brief survey to establish penetration of podcast listening in Canada (May 22-24, 2019)

3,040 Canadians, aged 18+

1,538 monthly
podcast listeners, 18+

In-Depth Survey: to probe range of podcast behaviour, interests and attitudes among podcast listeners (June 13-July 2, 2019)

A man with dark hair is shown in profile, wearing large black over-ear headphones. He is looking down at a smartphone held in his hands. The background is a blurred city street at night, with out-of-focus lights in shades of blue, orange, and white. The overall scene suggests a person engaged in podcast listening or mobile media consumption in an urban environment.

Podcast Landscape in Canada

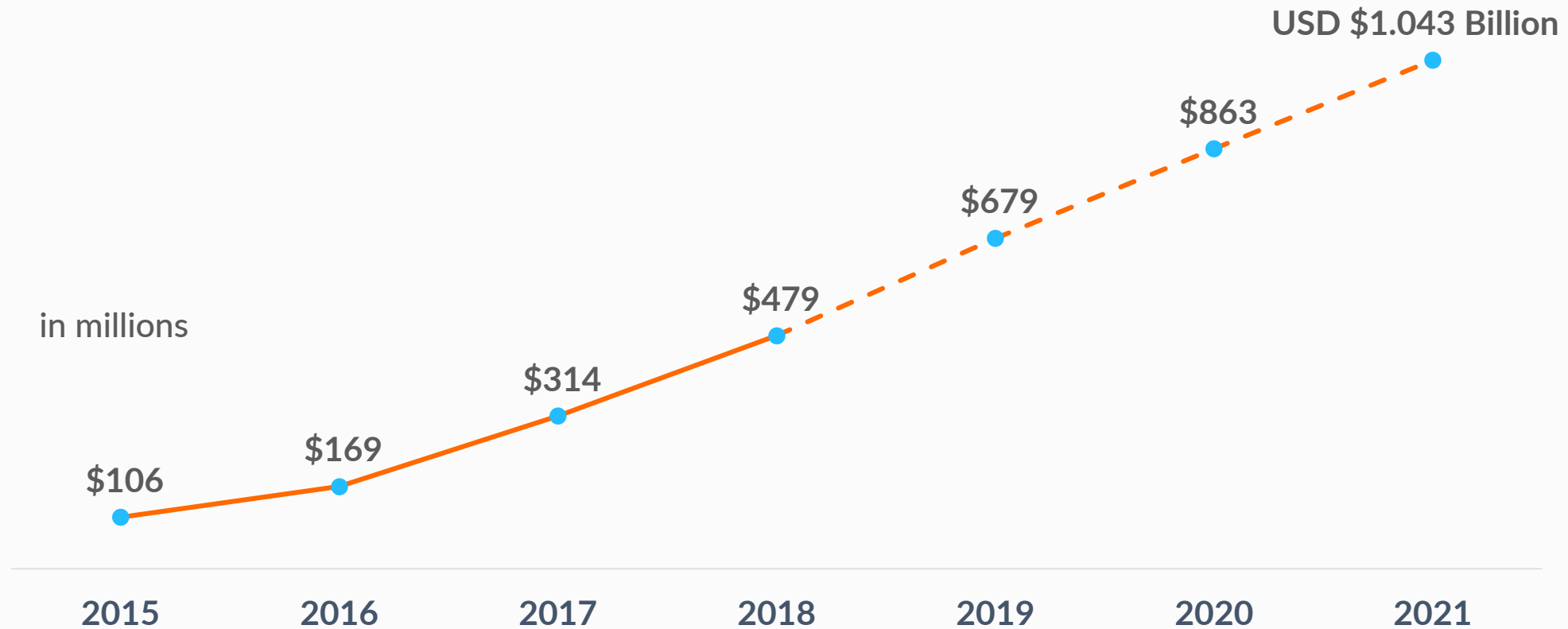
Following global trends, increased activity in Canadian podcasting shows promise at closing the consumption > monetization gap.

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.



Podcasting in Canada poised for steep growth in ad revenue

A slow-starting podcast ecosystem and sales infrastructure has held back ad revenue for podcasts in Canada.

A spike in investment and new initiatives in podcasting by Canadian broadcasters and independents are helping Canada catch up.

\$1.5b in radio ad revenue (2017)¹

~4% share of audio to podcasts (2018)²

= **~\$60m** potential ad revenue



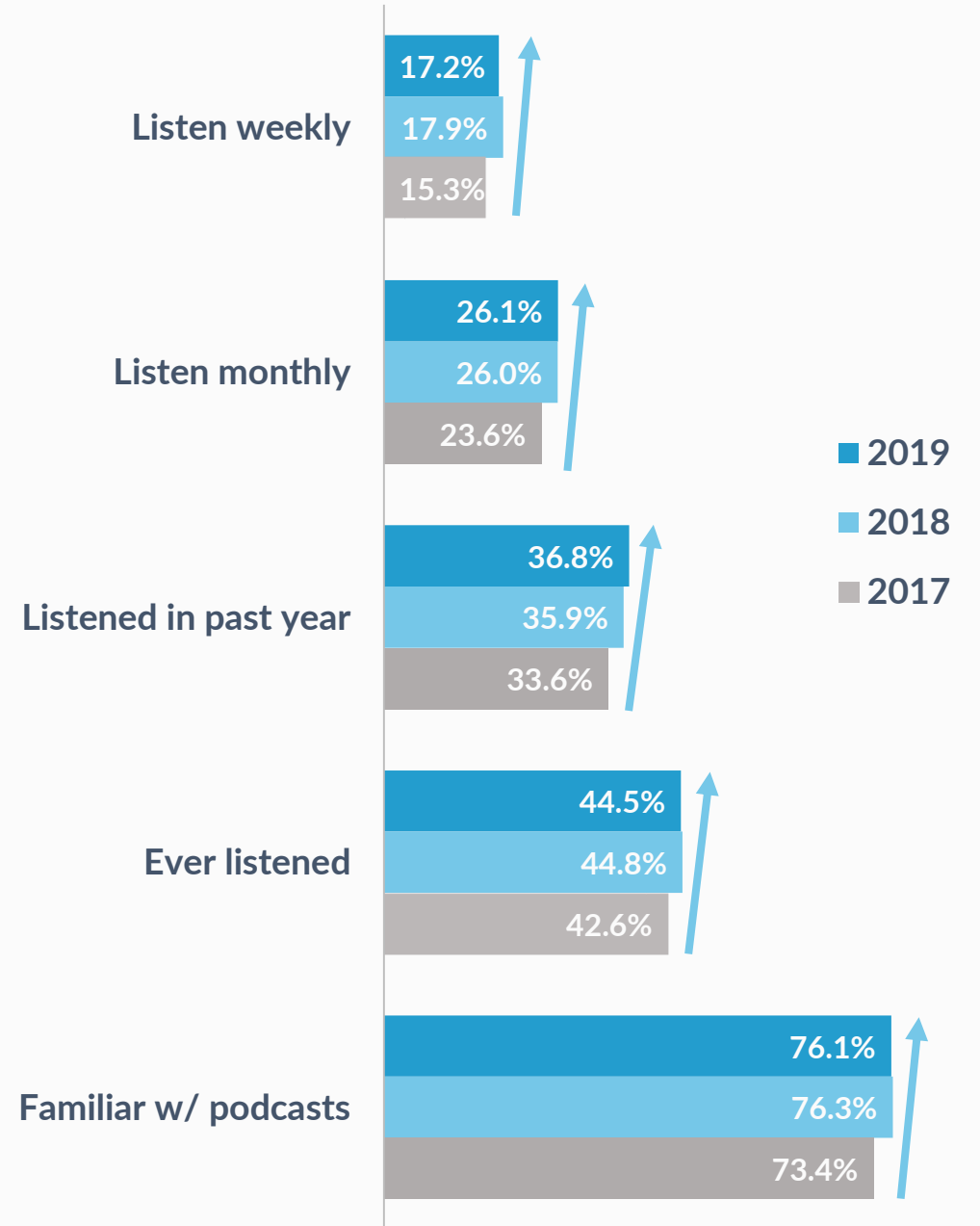
Source(s):

¹ CRTC Communications Monitoring Report 2018

² Radio on the Move Fall 2018. Audience Insights Inc./Radio Connects

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.

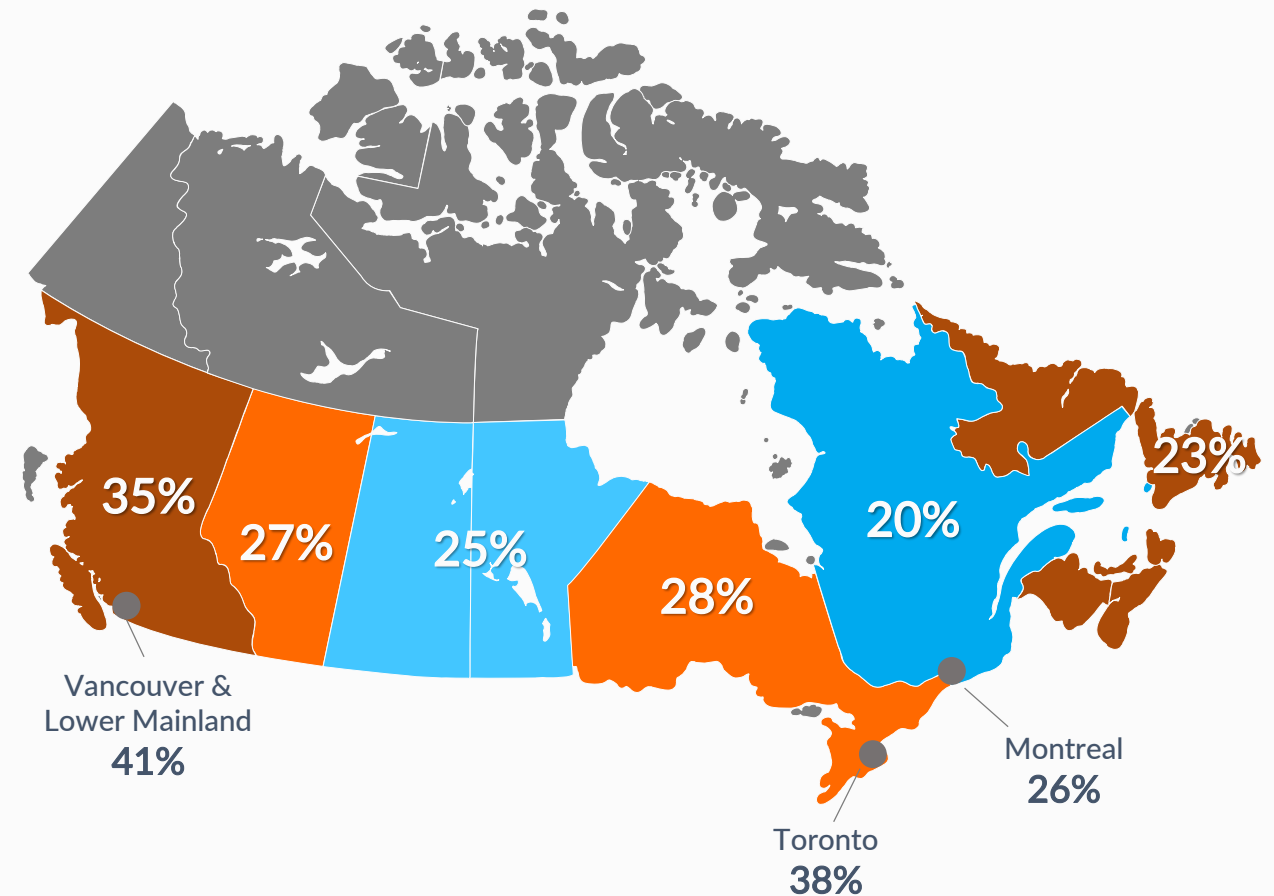


Source: The Canadian Podcast Listener 2019 - Calibration Study
Which of the following best describes your most recent experience with podcasts / How often do you listen to podcasts?
Base: Canadians, aged 18+ (Jul/Aug 17: n=2,518; May 18: n=3,118; May 2019: n=3,040)

% in Each Region Who Listen to Podcasts Monthly

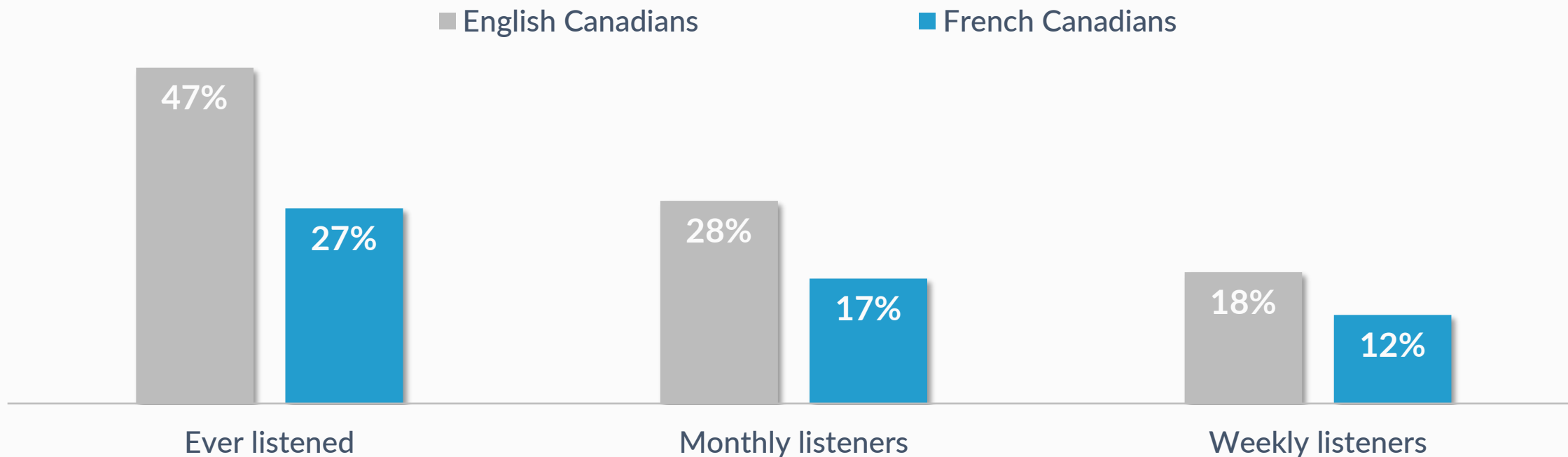
Podcast listening in Canada continues to be most popular in urban areas.

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



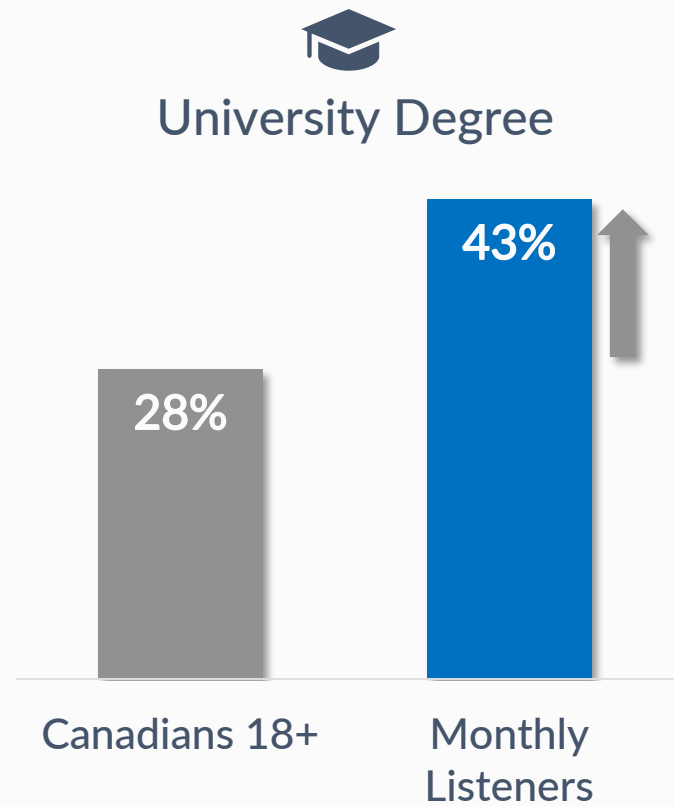
Source: The Canadian Podcast Listener 2019 - Calibration Study
Which of the following best describes your most recent experience with podcasts / How often do you listen to podcasts? (Monthly = Listened in past year & listen 1+x/month)
Base: Canadians, aged 18+ (n=3,040)

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.

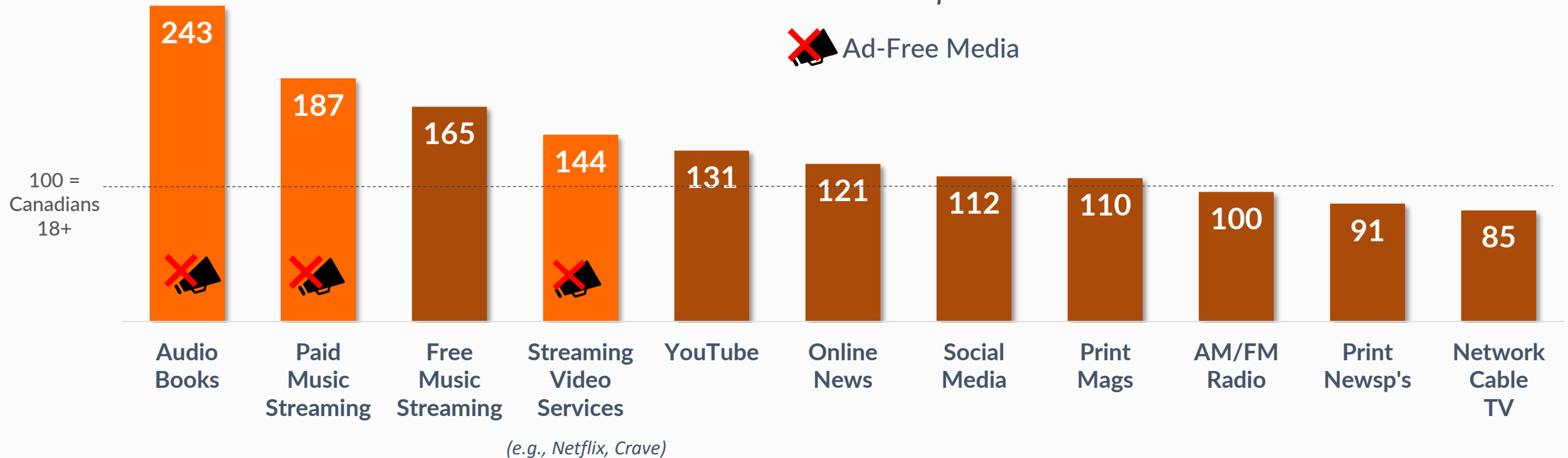


Source: The Canadian Podcast Listener 2019 – Calibration Study
Base: Canadians, aged 18+, (n=3,040), monthly podcast listeners (n=804)

Podcasts reach consumers of on-demand media.

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

Monthly Podcast Listening, Among Weekly Users of Each Media
Indexed to Canadian Population



Source: The Canadian Podcast Listener 2019 – Calibration Study

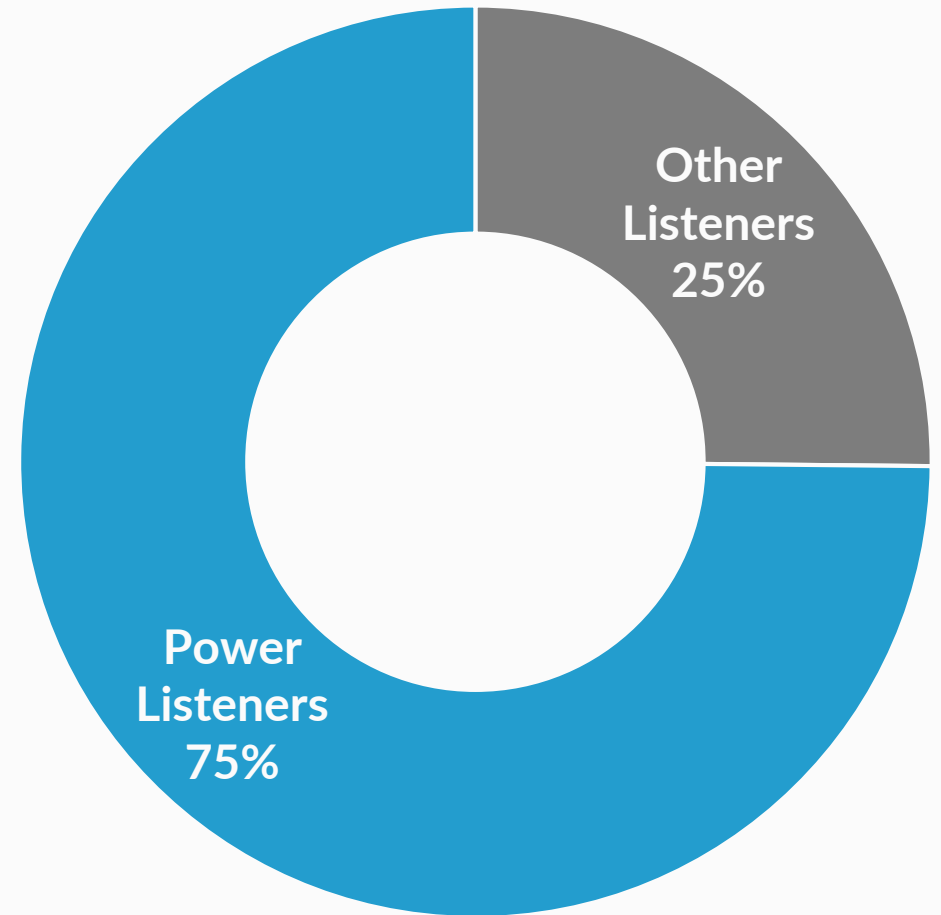
How often do you listen to audio podcasts?

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

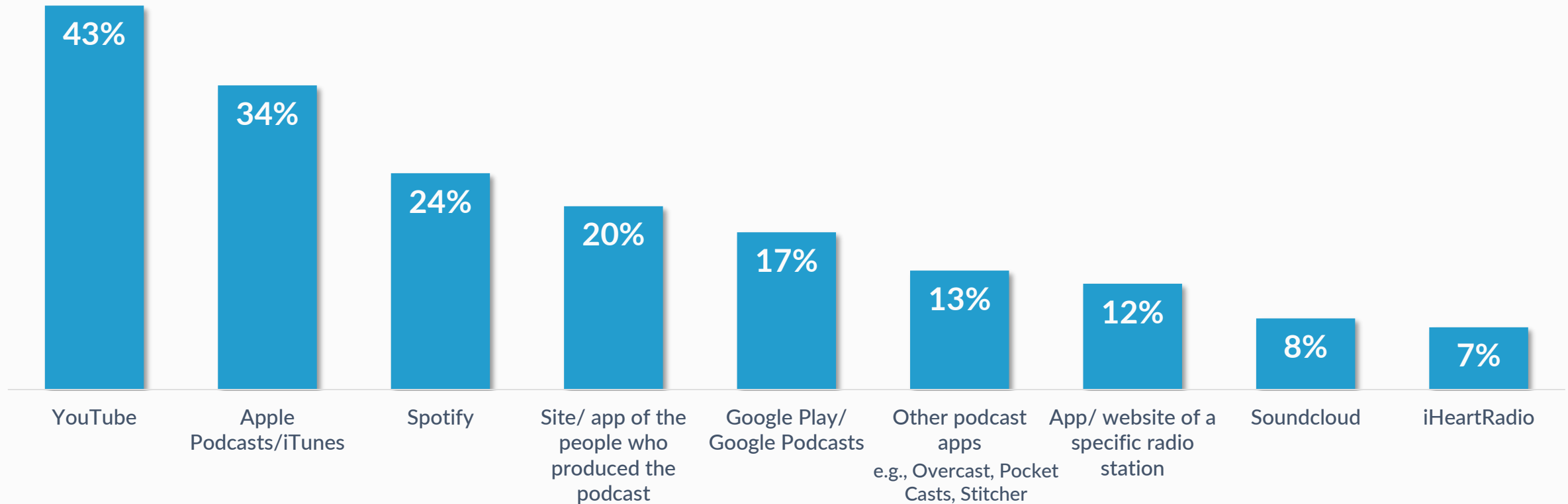
Podcast listening is moving beyond the iTunes/ Apple Podcast platform.

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

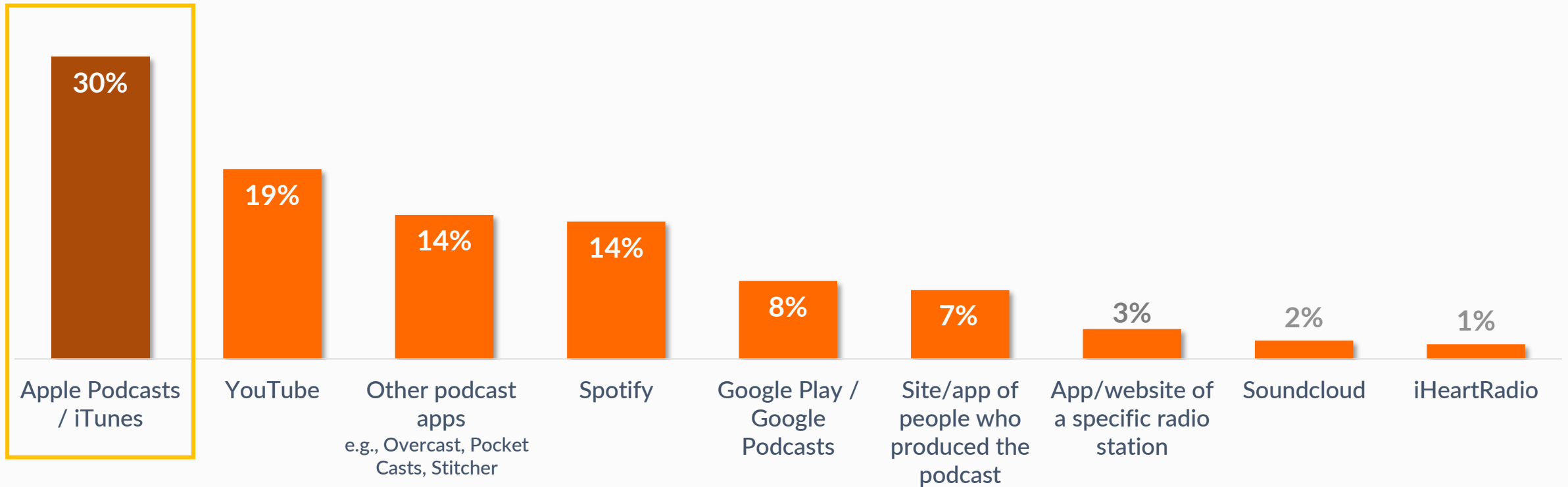
Which of these platforms have you used in the past year to access podcasts?

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

Power Listeners access Apple Podcasts most often.

While YouTube leads when it comes to platforms accessed at least once in the past year by all monthly listeners, the volume story is different. Apple is the clear leader as platform used most often among Power Listeners who account for most of the time spent listening to podcasts.

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)

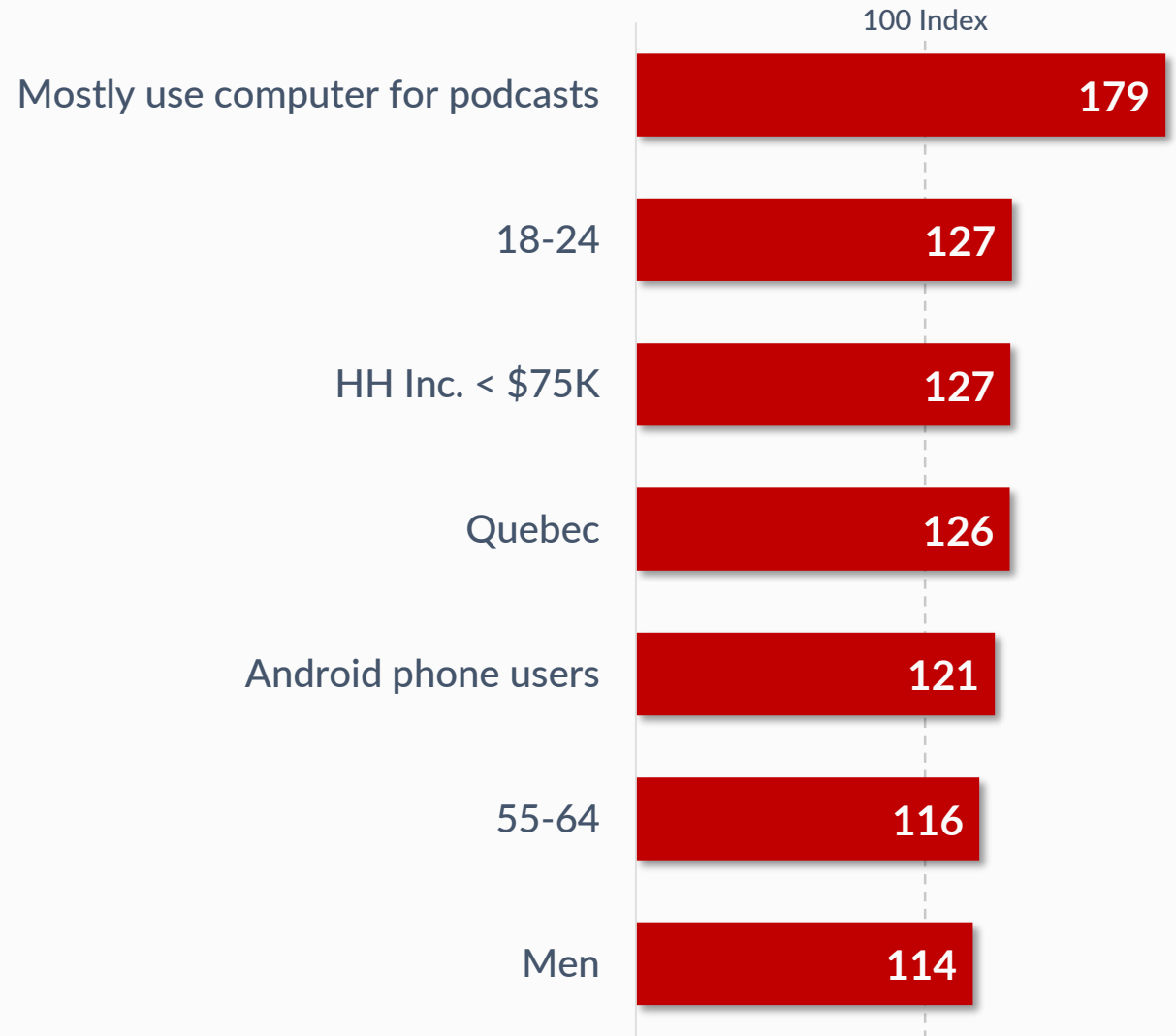
Who goes to YouTube most often to access podcasts?

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.



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)

Use YouTube Most Often *Indexed to the average monthly podcast listener*





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.

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.



Source: The Canadian Podcast Listener 2019

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

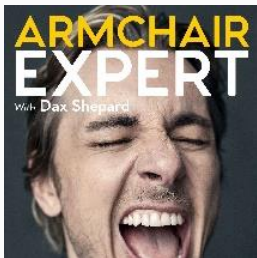



Base: Monthly podcast listeners, aged 18+ (n=1,538)

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	#6
	#104	#12
	n/a	#18
	#328	#20

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%	1	Stuff You Should Know	6.1%
2	The Joe Rogan Experience	5.1%	2	Mike Ward Sous Écoute	2.5%	2	Crime Junkie	5.2%
3	My Favorite Murder	4.1%	3	H3 Podcast	2.5%	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+, access podcasts on each platform most often: Apple Podcasts (n=364); YouTube (n=344); Spotify (n=187)

The Canadian Podcast Chart compiled in partnership with ART19



Engagement with Podcasts

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.

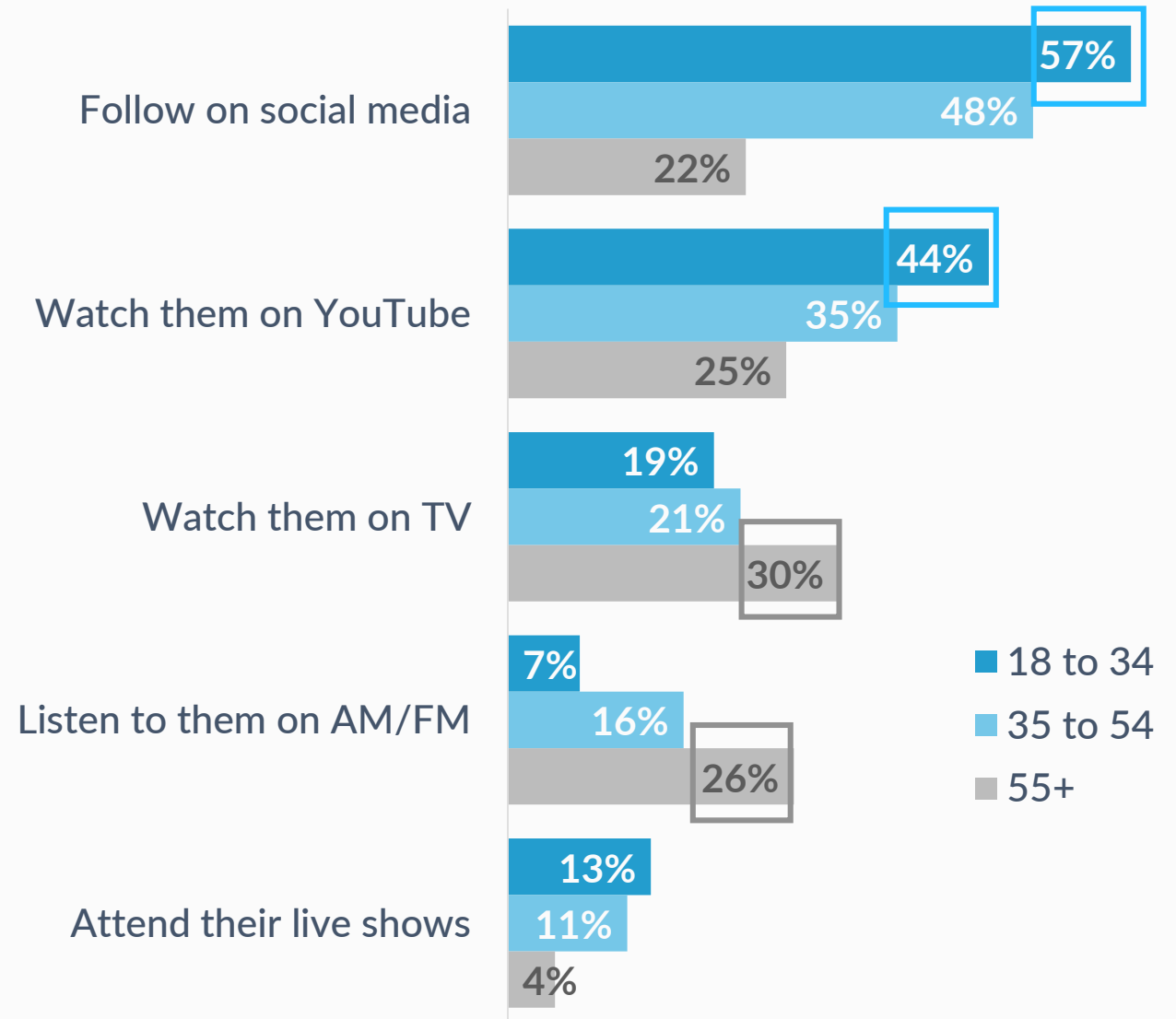
Source: The Canadian Podcast Listener 2019

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?



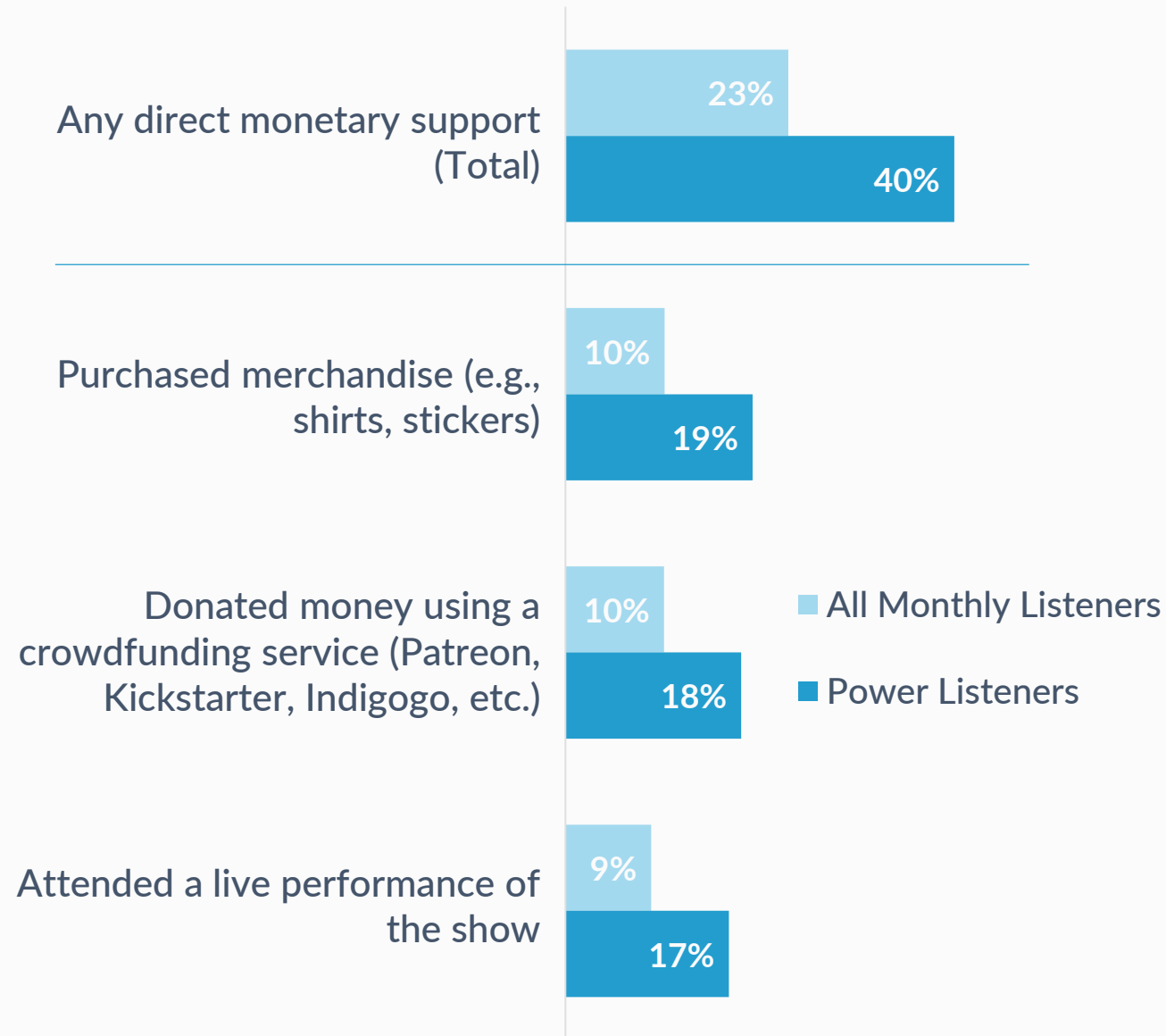
Nearly 1-in-4 podcast listeners have contributed monetary support to podcasts.

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.

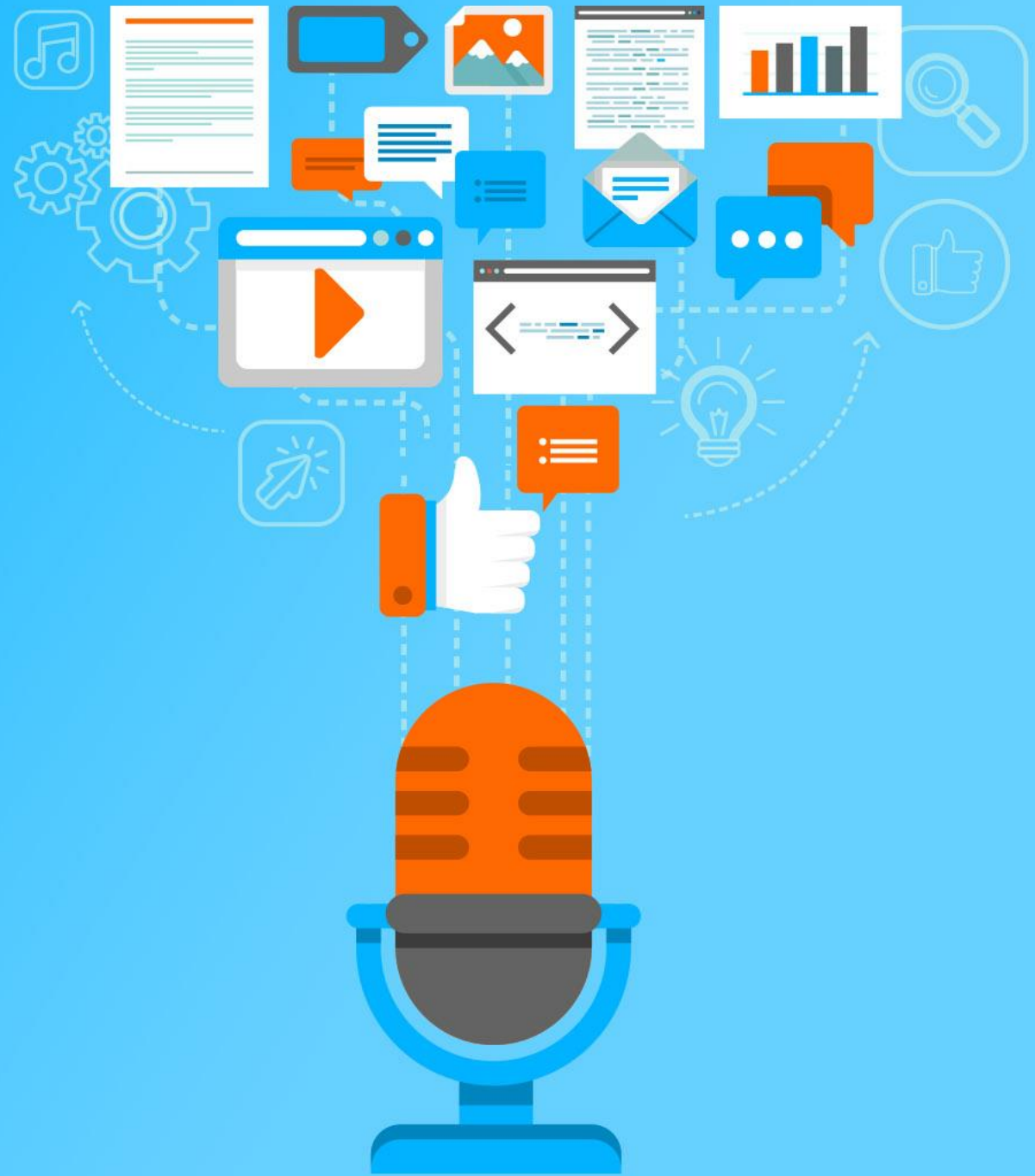


Source: The Canadian Podcast Listener 2019

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

44%

52%

■ All Monthly Listeners

■ Power Listeners

I go out of my way to support brands that support my favourite podcasts

17%

25%



Source: The Canadian Podcast Listener 2019

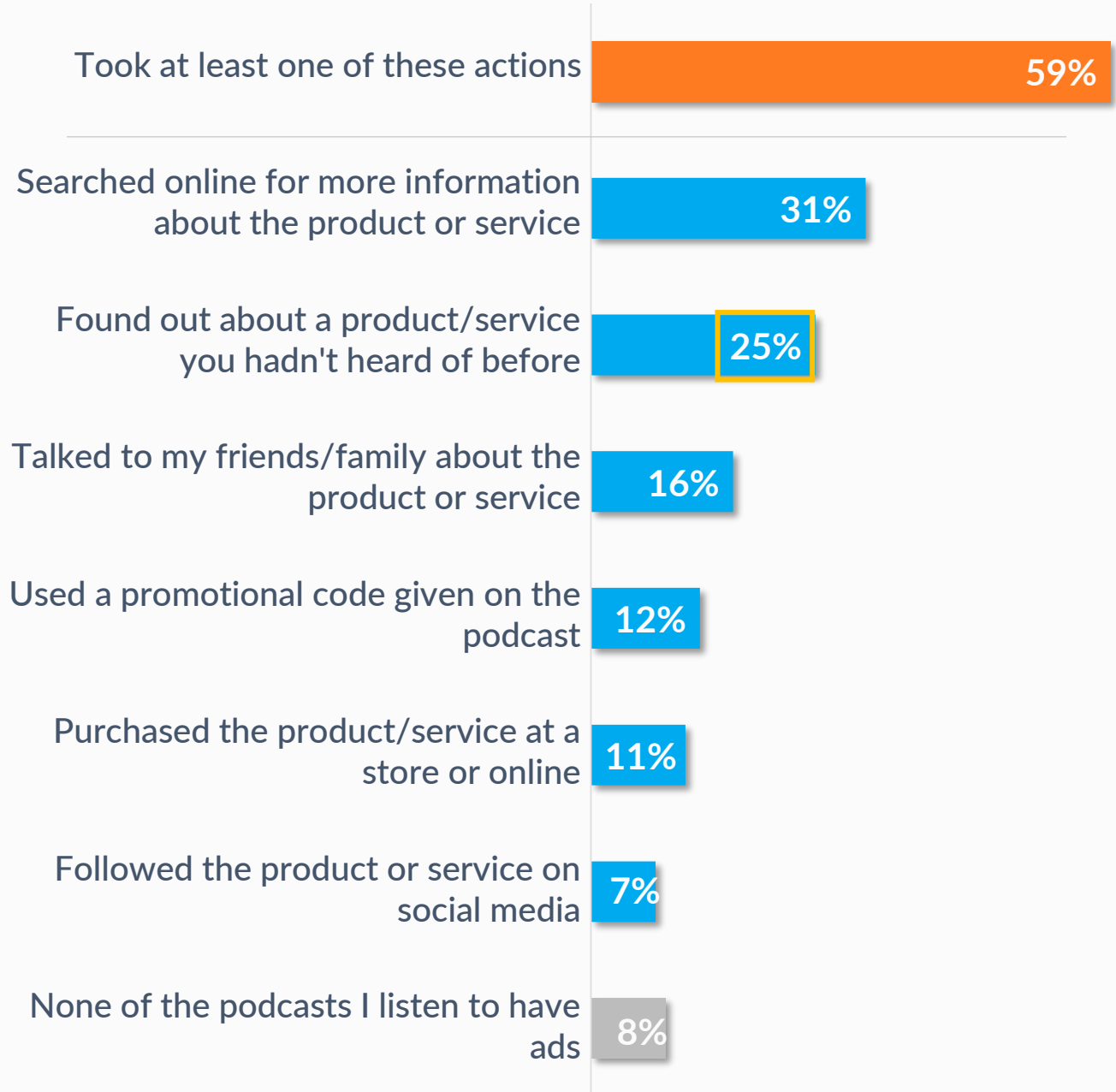
To what extent do you agree or disagree with the following statements about advertising in podcasts? (% "strongly agree" + % "agree")

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.

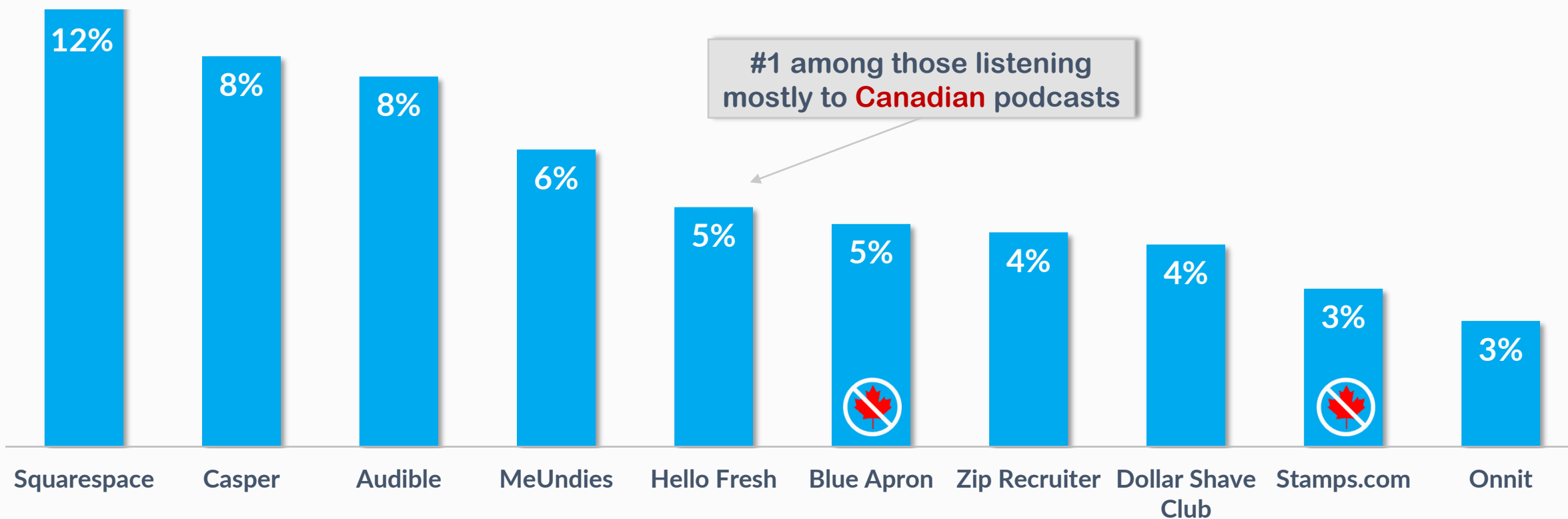


Source: The Canadian Podcast Listener 2019

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



Source: The Canadian Podcast Listener 2019

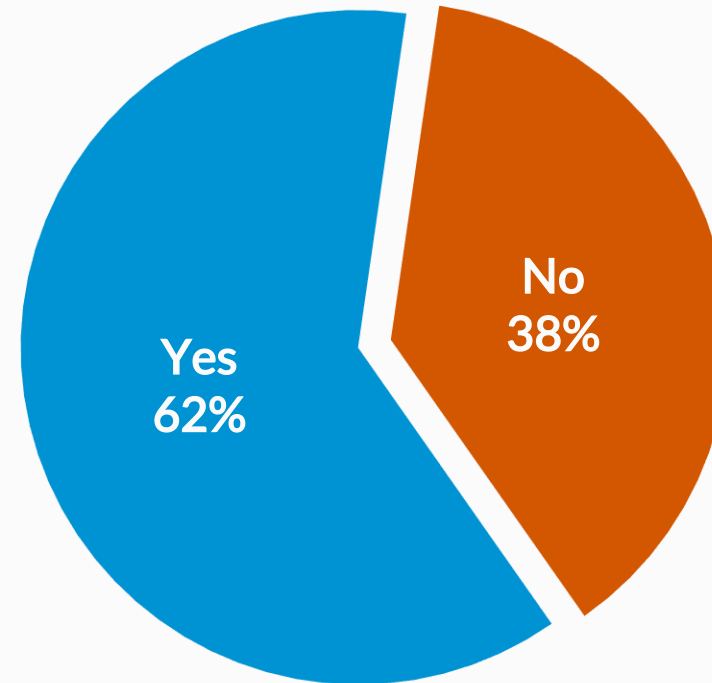
Which 3 brands, products and services first come to mind when you think of the advertising on the podcasts you listen to? (excludes platform mentions, e.g., Apple, Spotify, YouTube)

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?

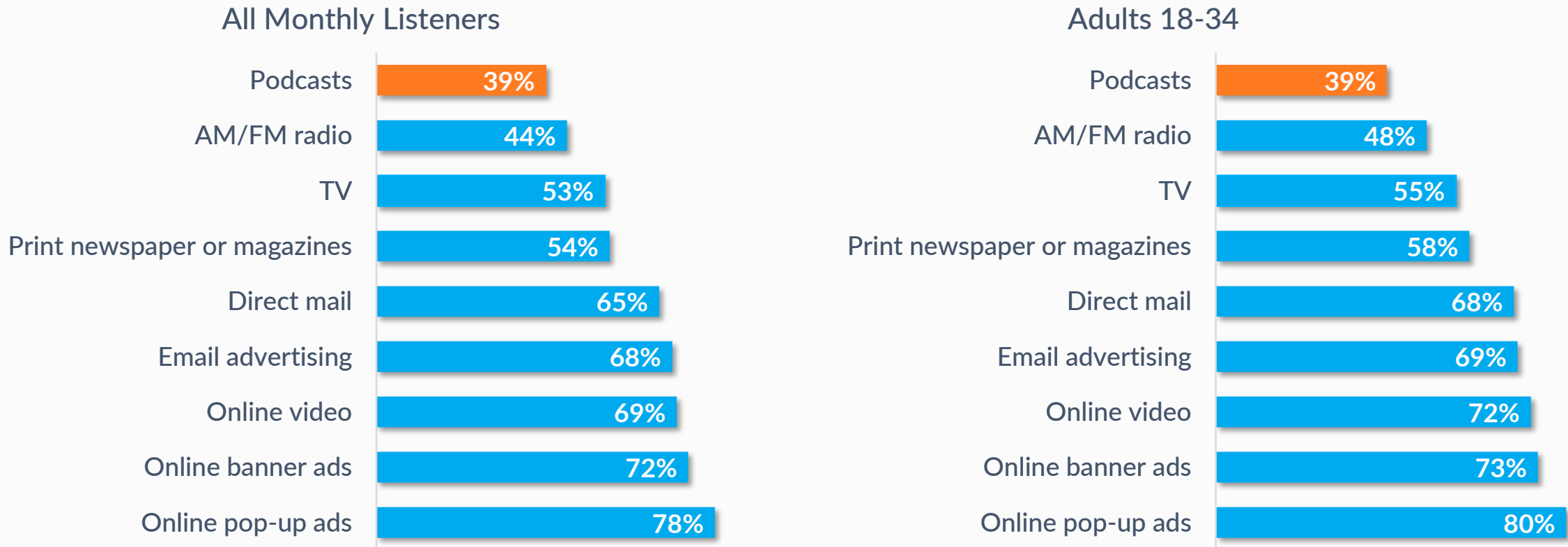
Have you ever tried to get more information on an ad you heard on a podcast only to find out that product or service isn't available in Canada?

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 avoid all types of ads... except those in podcasts.

% who Avoid each Medium's Ads All or Most of the Time



Source: The Canadian Podcast Listener 2019

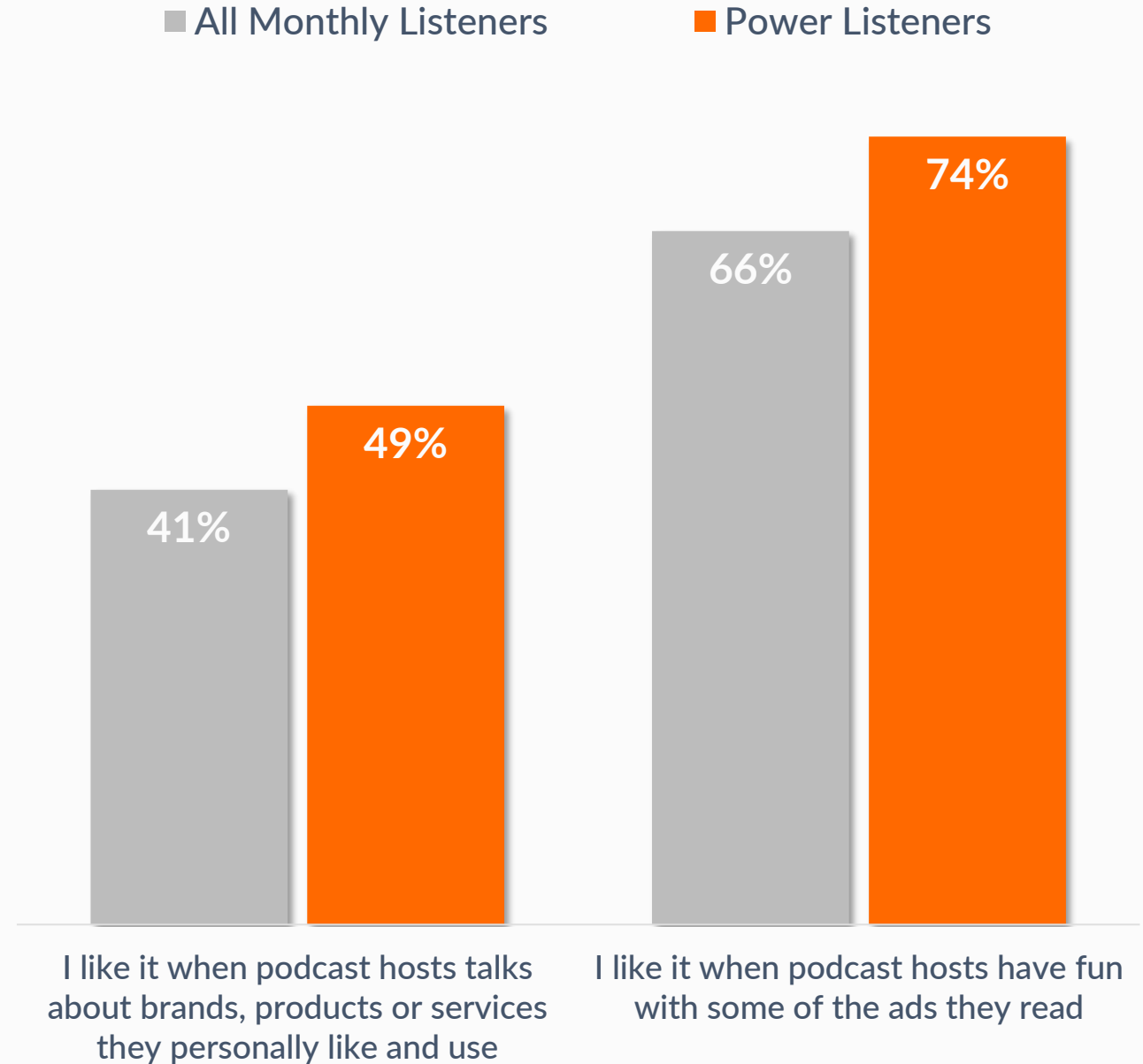
When you come across ads in each of the following places, how often do you actively avoid those ads by skipping, blocking, tuning out, turning away, throwing away or otherwise avoiding the ad?

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.



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 podcasts uniquely 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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