

The Canadian Podcast Listener 2020

Summary Report



SignalHill
Insights

With support from



THE PODCAST EXCHANGE

Mission

- to elevate the awareness and understanding of the Canadian podcast audience for podcasters, agencies and advertisers

Study Design

TWO SEPARATE ONLINE SURVEY COMPONENTS:

Calibration Survey: brief survey to establish incidence of podcast listeners in the overall population (Sept 24-26, 2020)

3,033 Canadians, aged 18+

1,618 monthly
podcast listeners, 18+

In-Depth Survey: averaging 18 minutes to probe range of podcast behaviour, interests and attitudes among podcast listeners (Oct 1-14, 2020)

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



Segments Identified in the Report

Canadians, aged 18+

refers to the market representative sample of 3,033 adult Canadians surveyed in the Calibration Survey.

This sample allowed us to establish the incidence of podcast listeners in the overall population, by region and within various demographic categories. These incidence estimates in turn provided inputs into the weight frame for the In-Depth Survey, ensuring that results are representative of Canadian podcast listeners.

Monthly podcast listeners

sometimes identified as simply “podcast listeners” or “monthly listeners” in the report, refers to the full sample of 1,618 podcast listeners reached in the longer In-Depth Survey.

To qualify for the In-Depth Survey, monthly podcast listeners had to report listening to podcasts at least once a month, confirming that by also having said they had listened to a podcast in the past year.

Power listeners (5+ hrs/wk)

refers to the 29% of monthly listeners who say they listen to podcasts 5+ hours per week. These listeners are disproportionately important for the ad impressions they deliver to a podcast campaign.

New listeners

refers to the 41% of monthly listeners who say they started listening regularly to podcasts in the past year. These listeners provide a window into how the Canadian podcast landscape is changing.

A young man with dark hair is shown in profile, looking down at a smartphone held in his right hand. He is wearing large black over-ear headphones with a red cord. The background is a blurred city street at night, with various colored bokeh lights (blue, orange, white) suggesting an urban environment. A solid orange horizontal band is overlaid across the middle of the image, containing the title text.

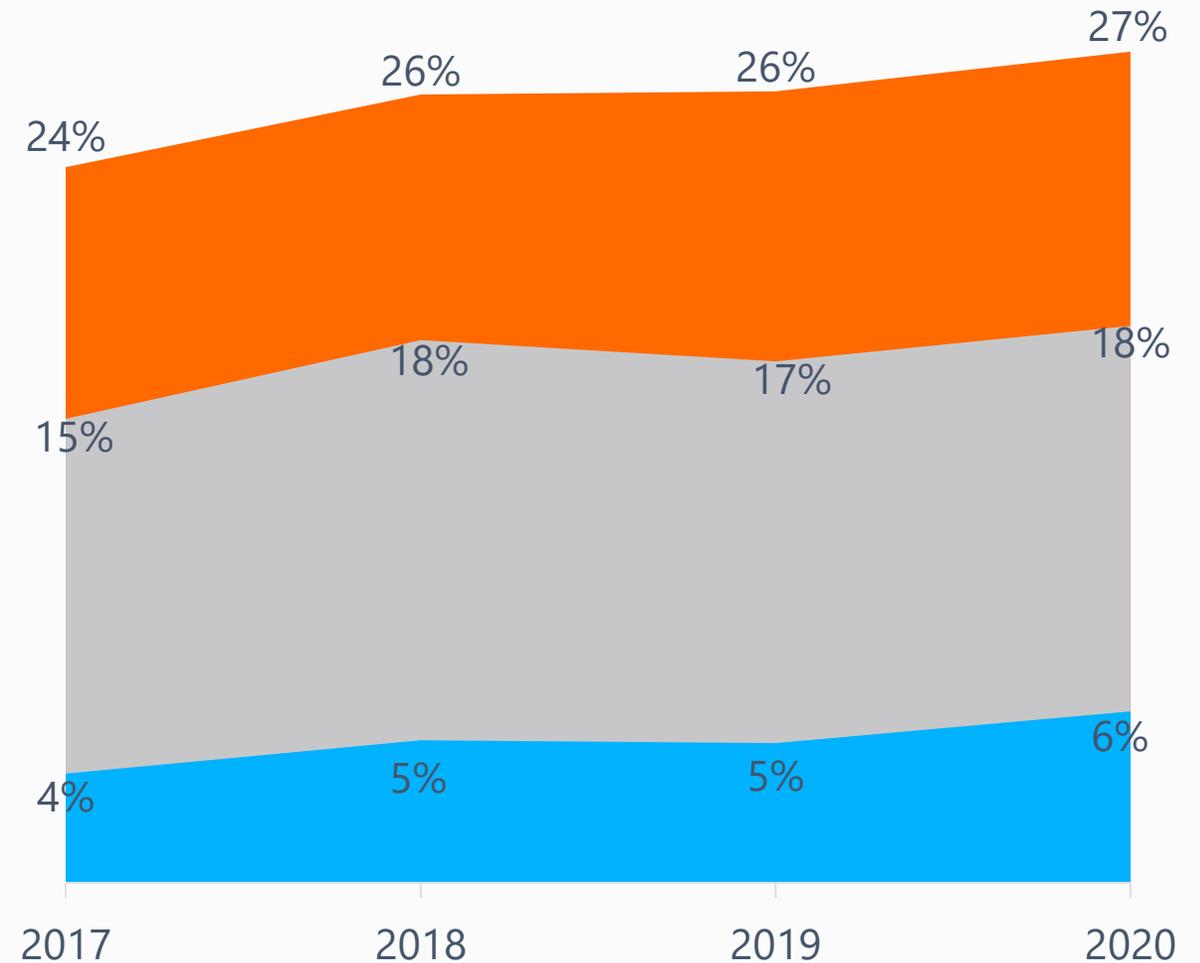
Podcast Landscape in Canada

Growth in podcast listening continues

Despite the disruption of COVID-19, podcast listening continues to show incremental year-over-year growth, with 27% of Canadian adults now listening monthly. Daily listening is up most sharply from 2017.

Podcast Listening - % of Canadians 18+

Listen monthly Listen weekly Listen daily



Source: The Canadian Podcast Listener 2020 – 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 2017 (n=2,518); May 2018 (n=3,118); May 2019 (n=3,040); Sept 2020 (n=3,033);

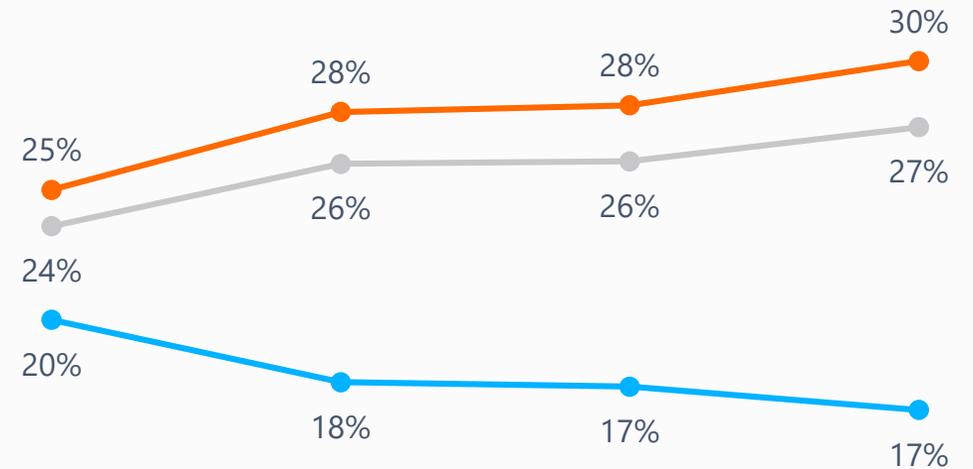
Growth tempered by French Canada

Monthly listening among English-speaking Canadians has hit 30%, while monthly listening in French Canada has stagnated.

Francophones who do listen regularly are however digging in—past week listening in French Canada is up from 9 to 12% since 2017.

Monthly Podcast Listening A18+

— Total — English — French



2017

2018

2019

2020

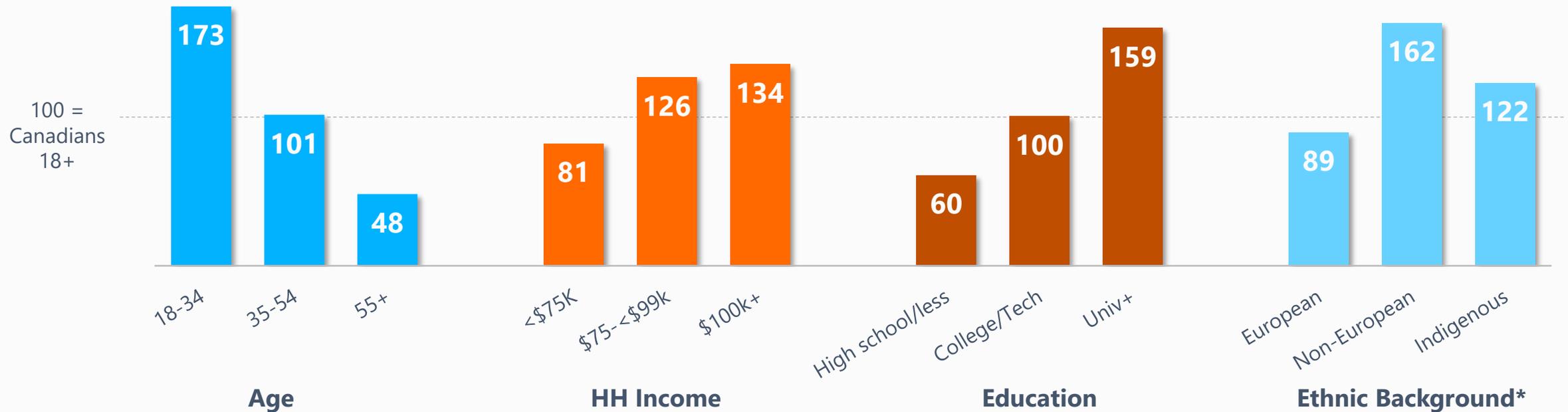
Source: The Canadian Podcast Listener 2020 – Calibration Study
Which of the following best describes your most recent experience with podcasts / How often do you listen to podcasts? Base: Canadians, aged 18+; English: Jul/Aug 2017 (n=2,051); May 2018 (n=2,554); May 2019 (n=2,477); Sept 2020 (n=2,480); French: Jul/Aug 2017 (n=467); May 2018 (n=564); May 2019 (n=563); Sept 2020 (n=553);



Podcast listeners—a unique, attractive audience

As the Canadian podcast audience grows, it continues to deliver a young, well-educated, diverse and affluent target difficult to reach elsewhere.

Monthly Podcast Listeners, Indexed to Canadian Population

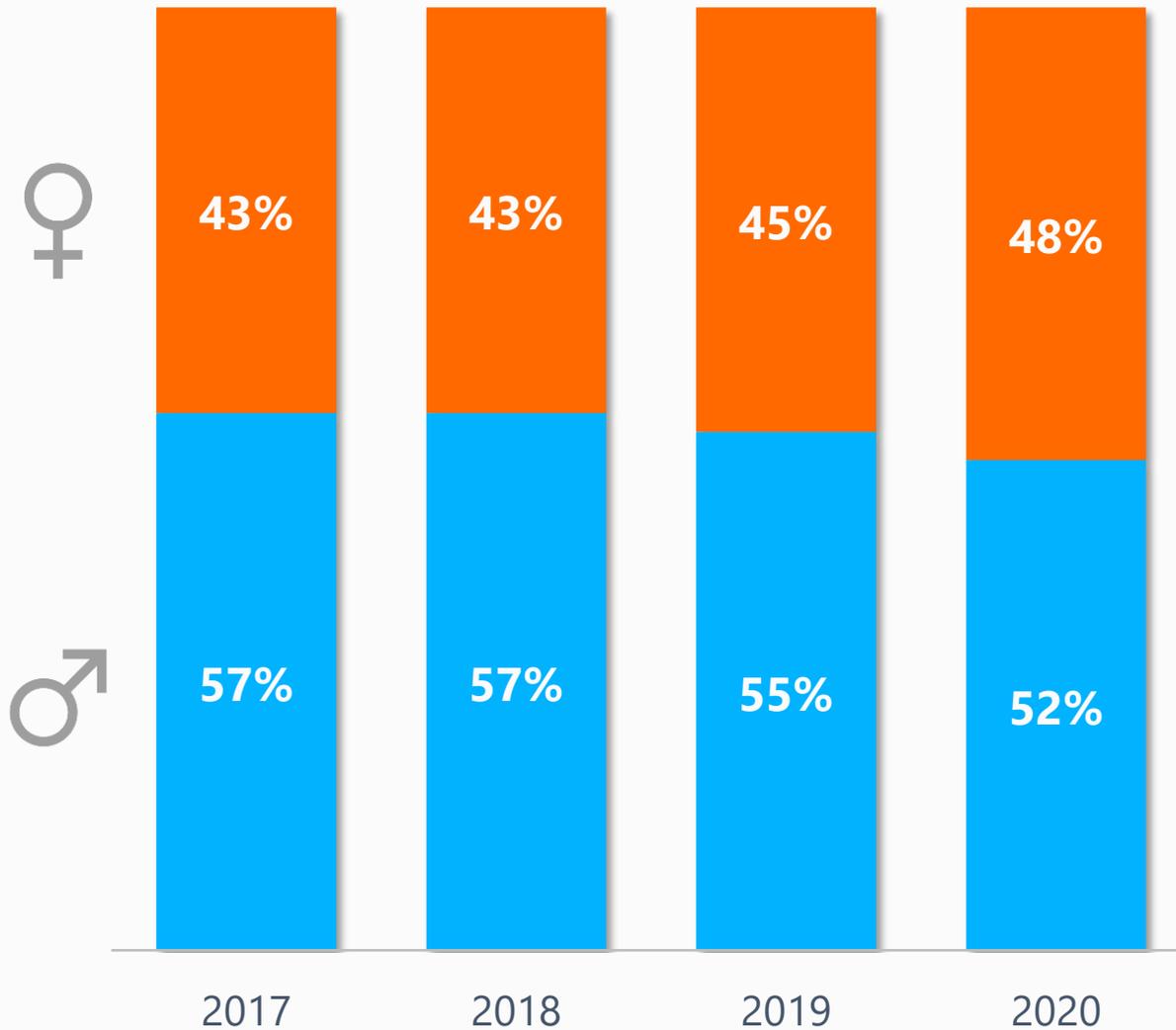


Source: The Canadian Podcast Listener 2020

Base: Canadians, aged 18+ (n=3,033)

*Ethnic background based on response: "What are the ethnic or cultural origins of your ancestors?" Multiple responses accepted. If any non-European origin mentioned, respondent is classified as "Non-European."

Monthly Podcast Listeners, Composition by Gender



**Podcast listening
now more evenly
split between men
and women**

Women now make up a larger part of the podcast audience, representing nearly half of monthly listeners.

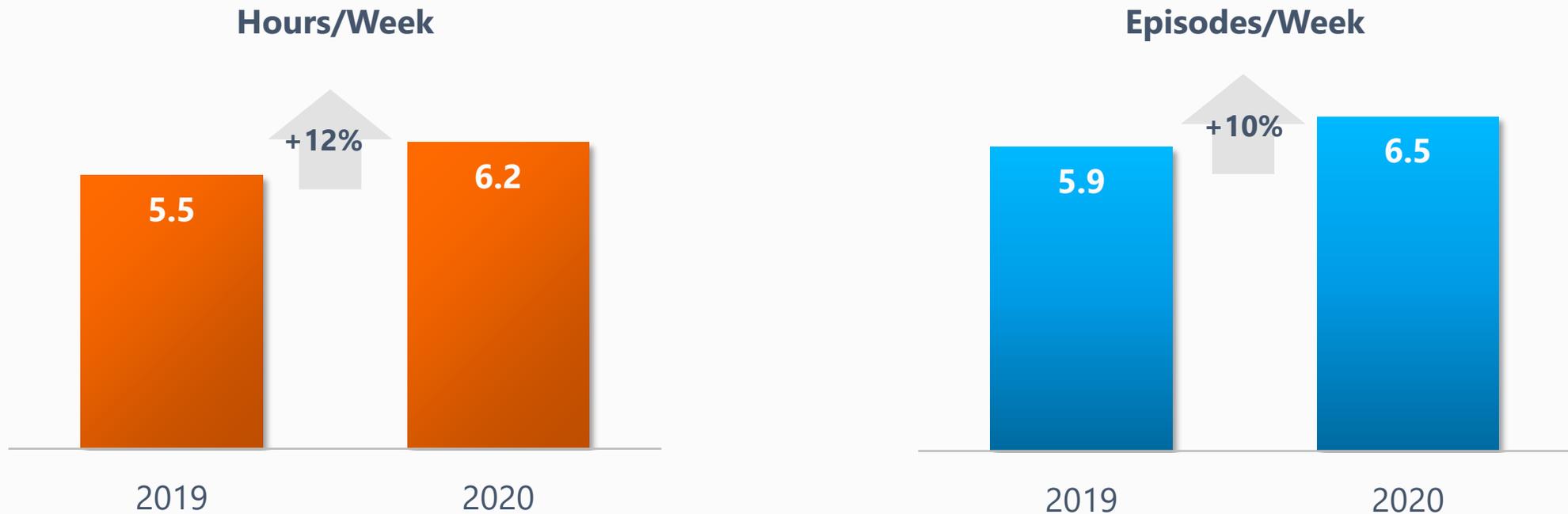


Source: The Canadian Podcast Listener 2020

Base: Canadians, aged 18+; Jul/Aug 2017 (n=2,518); May 2018 (n=3,118); May 2019 (n=3,040); Sept 2020 (n=3,033);

Volume up among weekly listeners

Despite only modest increases in monthly listening from 2019, existing listeners are spending more time listening to podcasts and are listening to more episodes.



Source: The Canadian Podcast Listener 2020

P1. How much time would you say you spend listening to podcasts in a typical week?

P2. In total, how many podcast episodes would you say you listen to in a typical week? Please tell us the total number of episodes of all the podcast series you listen to.

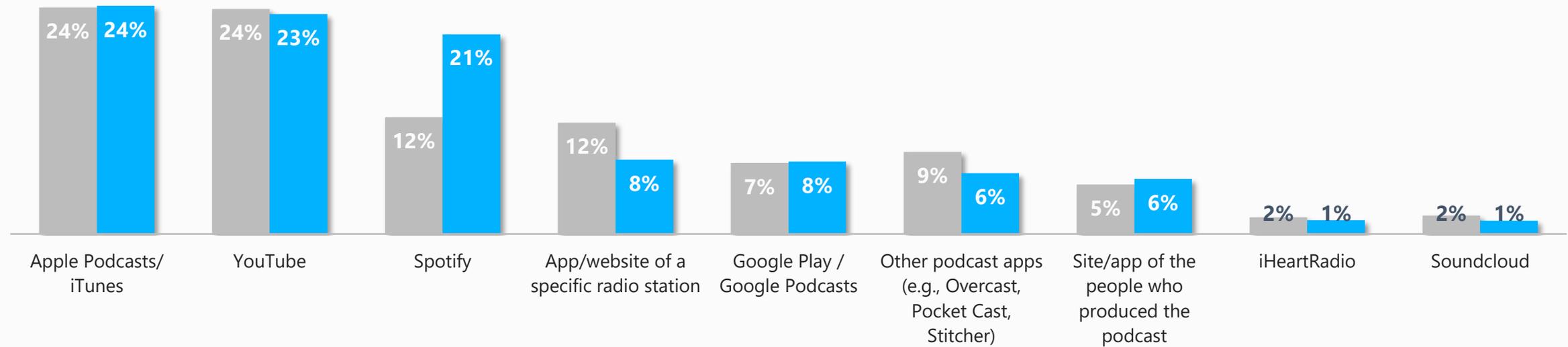
Base: monthly podcast listeners, aged 18+, listen at least weekly; 2019 (n=1,077); 2020 (n=1,130)

Spotify up nearly 2x as platform used most often

Spotify gains 9 share points from last year, putting it just behind Apple Podcasts and YouTube. Apple has retained its user base and holds an 8-point lead (28-20%) among the Power Listeners (5hrs+/week) who account for most podcast listening in Canada.

Platform used most often

■ 2019 ■ 2020



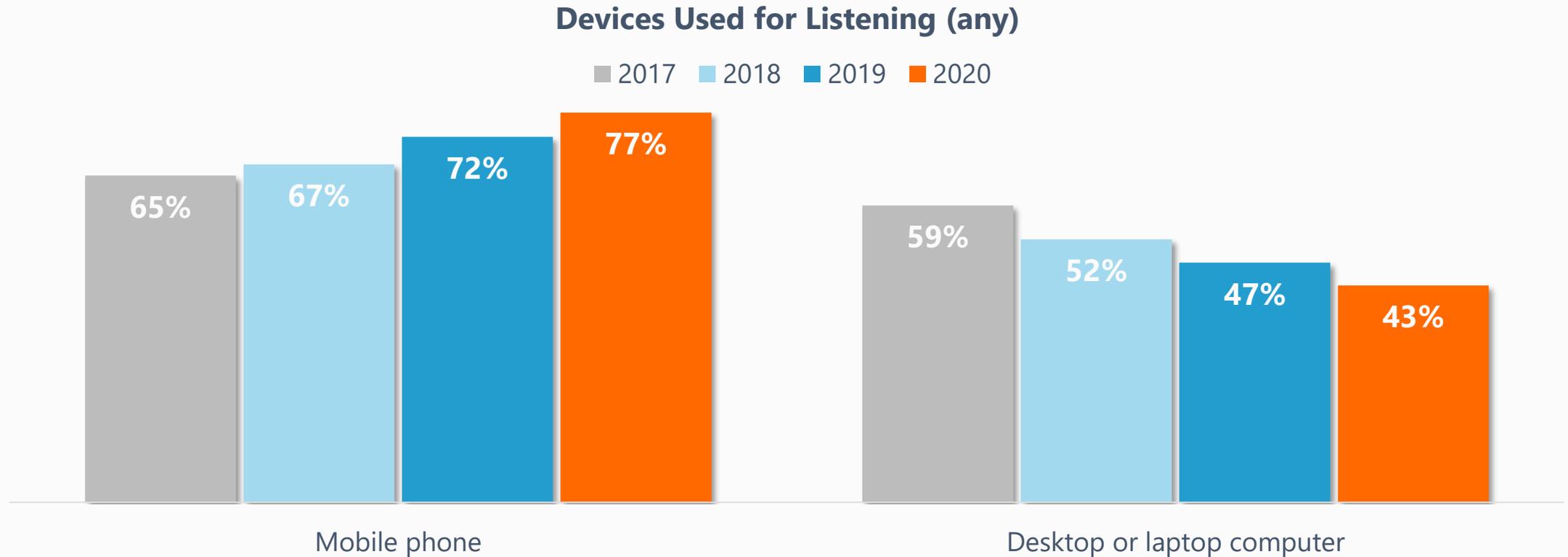
Source: The Canadian Podcast Listener 2020

E9B. Which of those platforms do you use most often to listen to podcasts?

Base: monthly podcast listeners, aged 18+; 2019 (n=1,538); 2020 (n=1,618)

Mobile listening increasingly ubiquitous

More than three-quarters of monthly listeners now listening to some of their podcasts on their mobile device.



Source: The Canadian Podcast Listener 2020

E6.V1. Of all the time you currently spend listening to podcasts, what proportion is done using each of the following devices?

Base: monthly podcast listeners, aged 18+; 2017 (n=1,507); 2018 (n=1,534); 2019 (n=1,538); 2020 (n=1,618)



The Canadian Podcast Chart

ART19

By asking listeners to name up to 10 podcasts they listened to in the past month, The Canadian Podcast Listener offers insights into what people listen to as opposed to what they download.

Thanks to our data partners at ART19 who matched publishers and genres to the 2,848 podcasts named by the 1,618 listeners in the study, we also get a view of the types of podcast that reflect Canadian listening.

Rising Stars 2020

Rising stars for 2020 include *Call Her Daddy*—a Barstool Sports podcast that saw no shortage of controversy earlier in 2020—as well as two podcasts that launched since last year’s study, *The Michelle Obama Podcast* and *Office Ladies*.



Source: The Canadian Podcast Listener 2020
P4. Please list up to 10 podcasts you remember listening to in the past month.
Base: monthly podcast listeners, aged 18+; (n=1,618)

2020 Rank

2019 Rank



#4

#243



#19

n/a

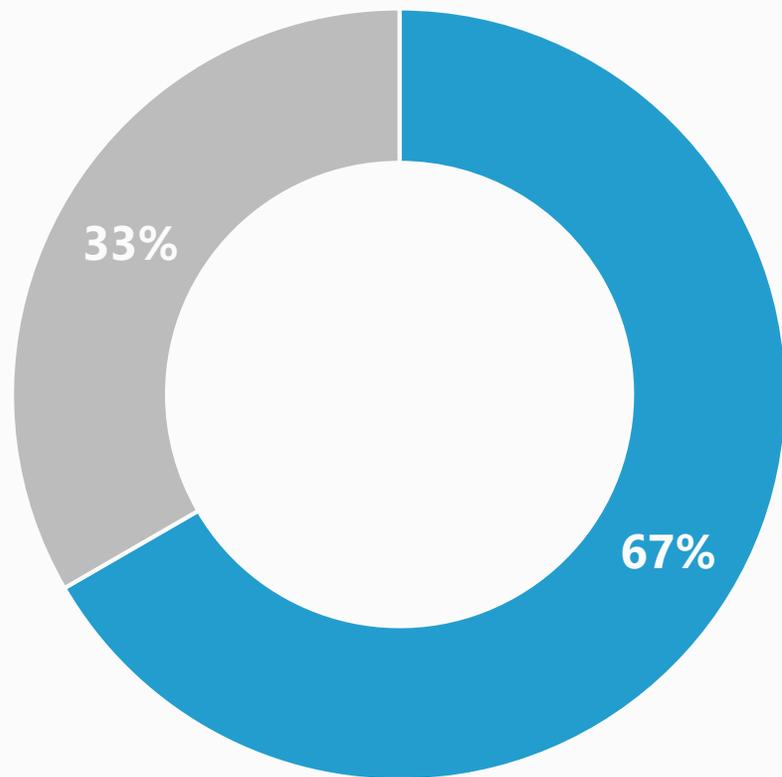


#22

n/a

Thinking of your favourite host, were you familiar with them before you listened to their podcast?

(among the 63% of monthly listeners with a favourite host)



- I got to know them in other media prior to their podcast
- Their podcast was my first exposure to them

Celebrity Podcasts

More than six-in-ten monthly podcast listeners (63%) say they have a favourite podcast, up from 56% a year ago.

Two-in-three listeners with a favourite host say they knew the host before listening to the podcast, showing the ability of popular personalities to draw listeners into podcasts.

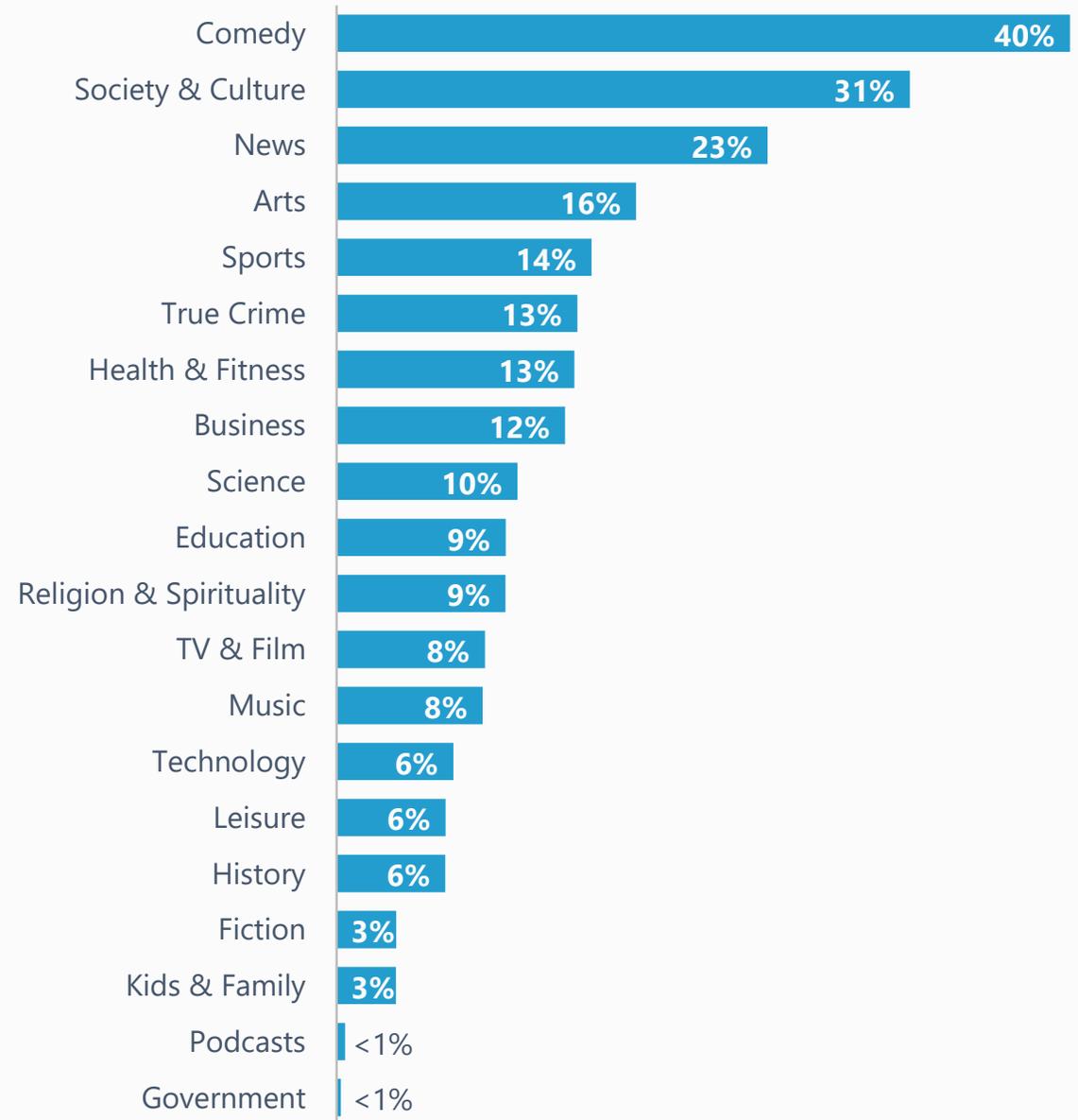


Source: The Canadian Podcast Listener P7E. For the next couple of questions, we'd like you to think of a favourite podcast host—someone you always look forward to hearing. P7EA. Thinking of that host, were you familiar with them before you listened to their podcast? Base: monthly podcast listeners, aged 18+; have a favourite host (n=1,023)

Top Genres in 2020

Apple Podcasts changed its genre classifications in 2019, making a direct comparison to last year impossible, but Comedy, Society & Culture and News remain popular genres.

True Crime has been added as a standalone genre (where previously these podcasts lived in multiple genres) and ranks as the 6th most popular genre.



Source: The Canadian Podcast Listener 2020
P4. Please list up to 10 podcasts you remember listening to in the past month.
Base: monthly podcast listeners, aged 18+; (n=1,618)

Country of Origin

The proportion of homegrown podcasts that Canadians say they listen to is up from 2019, with a corresponding decline in listening to US podcasts.

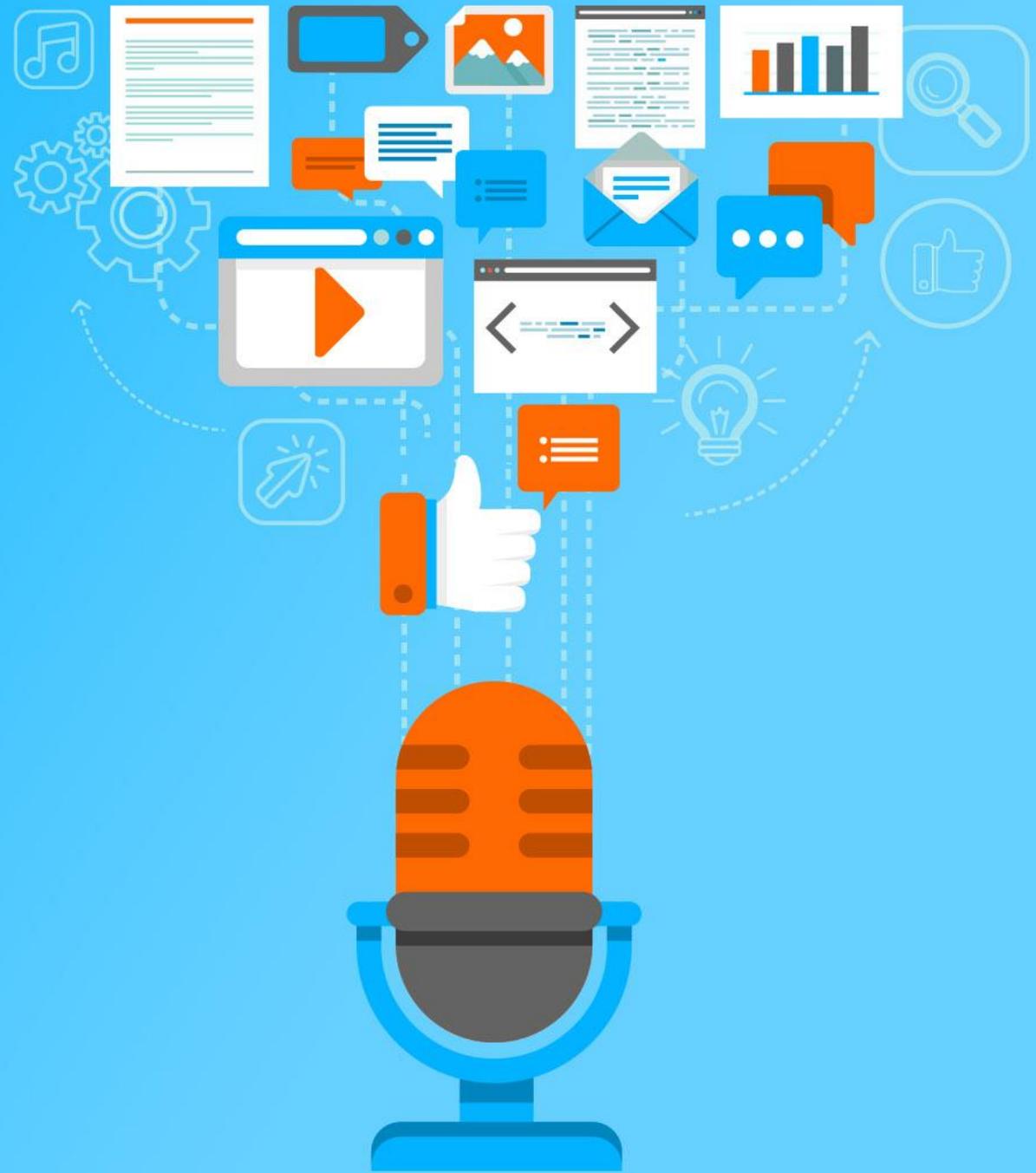
Of all the podcasts you listen to, about what proportion would you say are from:
(average of all podcast listeners)

	2019	2020
 USA	52%	49%
 Canada	38%	41%
 Britain	4%	5%
 France	2%	2%
 Elsewhere	4%	4%



Source: The Canadian Podcast Listener 2020
P10. Of all the podcasts you listen to, about what proportion would you say are from:
Base: monthly podcast listeners; aged 18+; 2019 (n=1,538); 2020 (n=1,618)

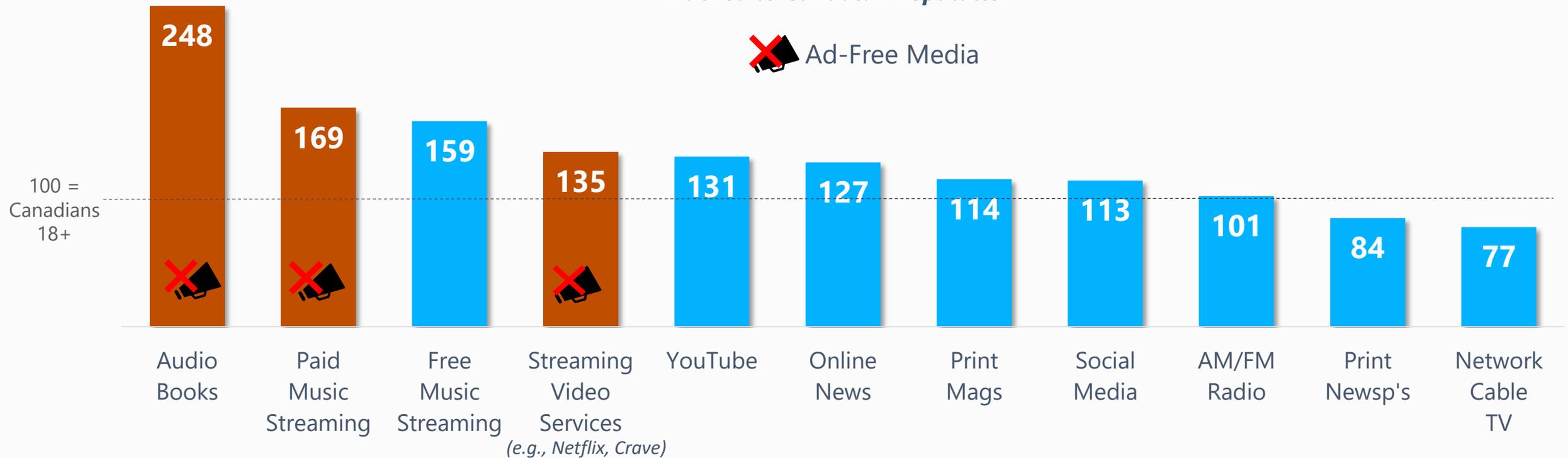
Advertising



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 2020

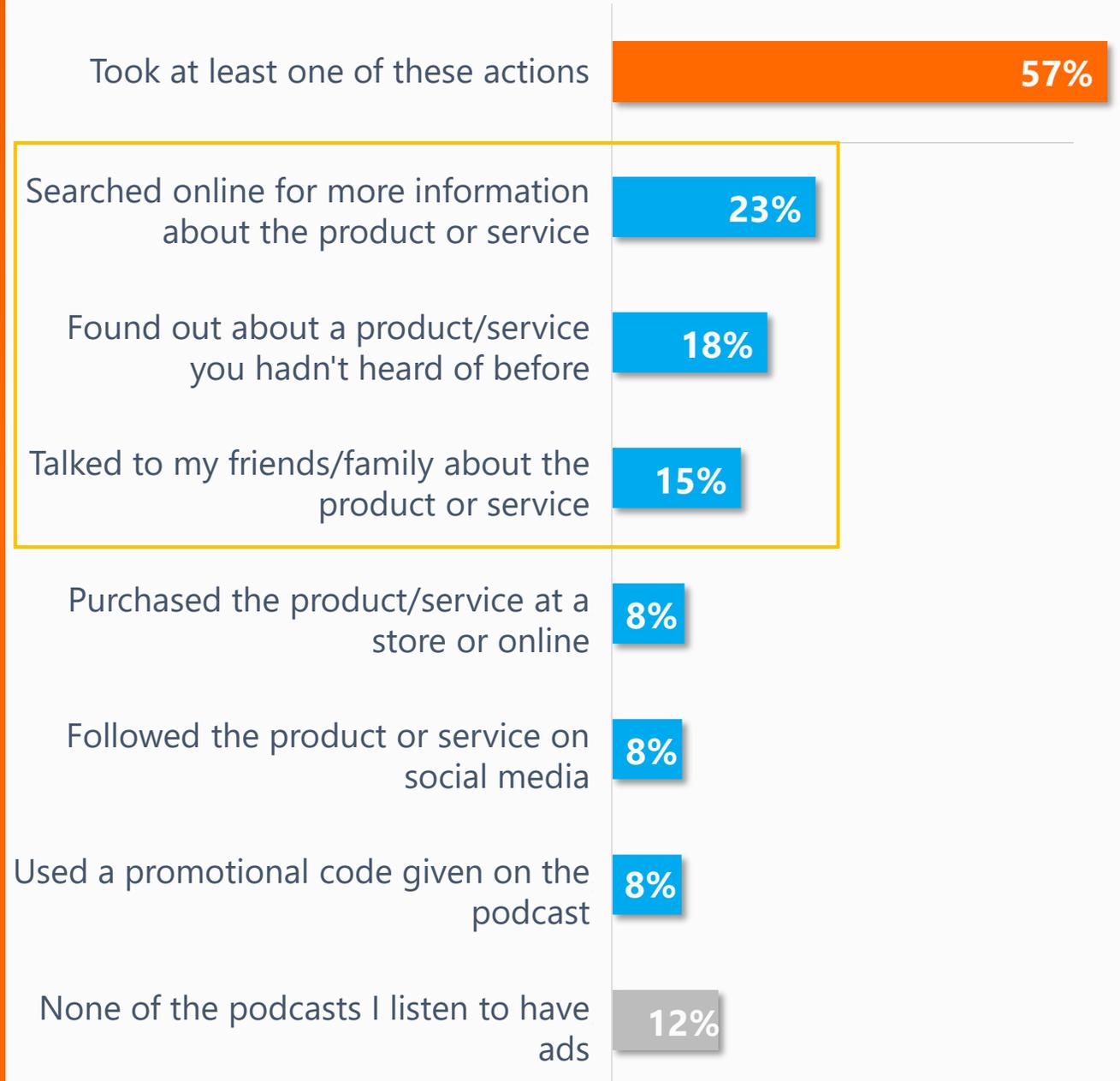
How often do you listen to audio podcasts?

Base: Canadians, aged 18+, weekly users of Audiobooks (n=144); Paid Music Streaming (n=516); Free Music Streaming (n=458); Streaming Video Services (n=1,415); YouTube (n=1,655); Online News (n=1,519); Social Media (n=2,001); Print Magazines (n=695); AM/FM (n=2,392); Print Newspapers (n=855); Network/Cable TV (1,933);

Podcast ads drive search, awareness and word-of-mouth.

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

The leading actions are search, learning about a new brand and talking to friends or family about a brand.



Source: The Canadian Podcast Listener 2020

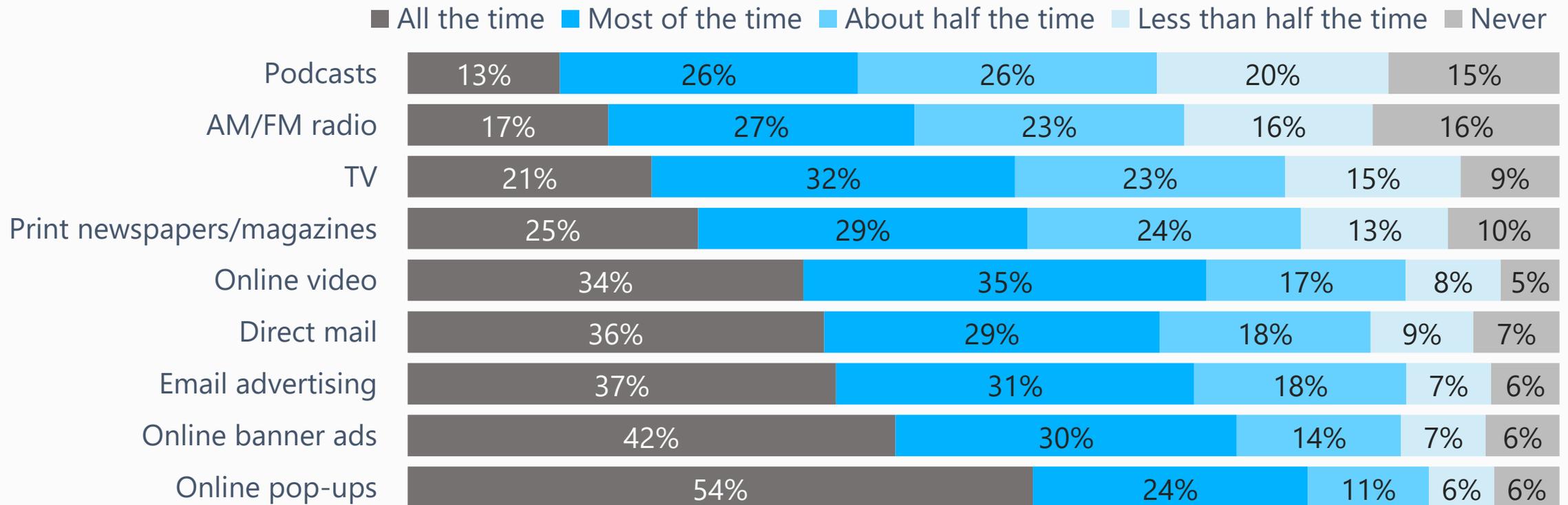
A3. After hearing a product or service advertised on a podcast, have you ever done the following?

Base: monthly podcast listeners, aged 18+ (n=1,618)

Ads still less likely to be avoided on podcasts

Ads on podcasts remain least likely of all media to be avoided 'all' or 'most of the time' by monthly listeners, and a close second to AM/FM for *never* being skipped.

How often do you actively avoid those ads by skipping, blocking, tuning out, turning away, throwing away or otherwise avoiding the ad?



Source: The Canadian Podcast Listener 2020

A4A. 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 18+; listen to podcasts with ads (n=1,400)

Takeaways

- **Podcast listening continues to grow in Canada, proving to be pandemic-proof.** Monthly podcast listening is up to 30% among Anglophones, with weekly listeners spending more time with podcasts they were last year. Monthly listeners are not growing among Francophones, but past week listeners are up.
- **Audience composition continues to shift towards a 50/50 gender balance.** Women are representing a larger slice of the podcast audience, up to 48% of monthly podcast listeners.
- **Spotify is re-shaping the podcast landscape.** Spotify is now effectively tied with Apple and YouTube as the platform where listeners most often access podcasts in Canada. Apple still holds a clear lead among Power Listeners who account for the most hours tuned to podcasts.
- **Canadian podcasts are attracting more Canadian listeners.** On average, monthly listeners now say that more than 40% of their listening is going to Canadian podcasts. Meanwhile, news, comedy and celebrity podcasts rank among the most popular types of podcasts in general.
- **Podcasts provide a unique opportunity for advertisers to reach on-demand consumers.** Nearly 6-in-10 podcast listeners report taking some kind of action based on hearing a podcast ad. Podcast listeners say they are less likely to avoid ads on podcasts than on other media.

A deeper drive into CPL 2020 is available via subscription

Report Outline:

Podcast Landscape: *Growth of listening, demos, regions*

Listening During COVID: *Changing habits, genre preferences*

The Canadian Podcast Chart: *Top podcasts, publishers and trends*

Discovery: *Where listeners found their most recent new podcast*

Shifting Platforms: *Streaming/downloads, subscriptions, devices*

French Canada: *Trends, top podcasts, platforms*

Engagement: *Attentiveness, motivations for listening*

Advertising: *Leading brands recalled, host read ads, ad avoidance*

Unlock access to the complete report on The Canadian Podcast Listener.

A subscription opens the door to exclusive content, including:

- **The Canadian Podcast Chart** – a web-based dashboard of 2,800+ podcasts listened to by 1,500+ monthly podcast listeners, including demo, genre and publisher info
- Virtual presentation of the study

We offer a variety of subscription types to meet the needs of various organizations, including educators.

For more details, contact:

joanne@signalhillinsights.com

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For more information on the findings in this report:

Jeff Vidler
Signal Hill Insights
jeff@signalhillinsights.com

SignalHill
Insights

Jeff Ulster
julster@thepodcastexchange.ca



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ART19