

The Canadian Podcast Listener 2018



Study Objectives

To:

- fill the information gaps in understanding the Canadian podcast listener
- inform business opportunities in this growing media sector
- identify growth areas from the 2017 study

Study Design

TWO SEPARATE ONLINE SURVEY COMPONENTS:

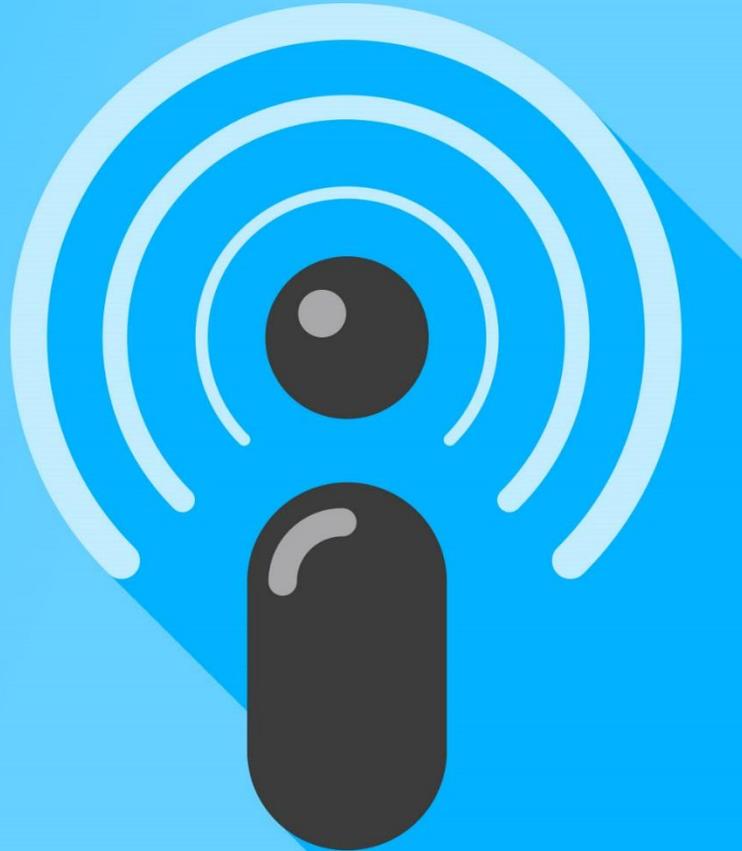
Calibration Survey: brief survey to establish incidence of podcast listeners in the overall population (May 25-30, 2018)

3,118 Canadians, aged 18+

1,534 monthly
podcast listeners, 18+

In-Depth Survey: averaging 13 minutes to probe range of podcast behaviour, interests and attitudes among podcast listeners (June 8-17, 2018)

Survey invites sent to representative sample of online Canadians on MARU Voice Canada (formerly Angus Reid Forum)



The Podcast Listening Landscape

Podcast listening shows modest growth since the inaugural Canadian Podcast Listener study in 2017.

Monthly listening is up from 24% to 26%, centred on a young, urban, educated, affluent target.

Podcast listening continues to grow in Canada.

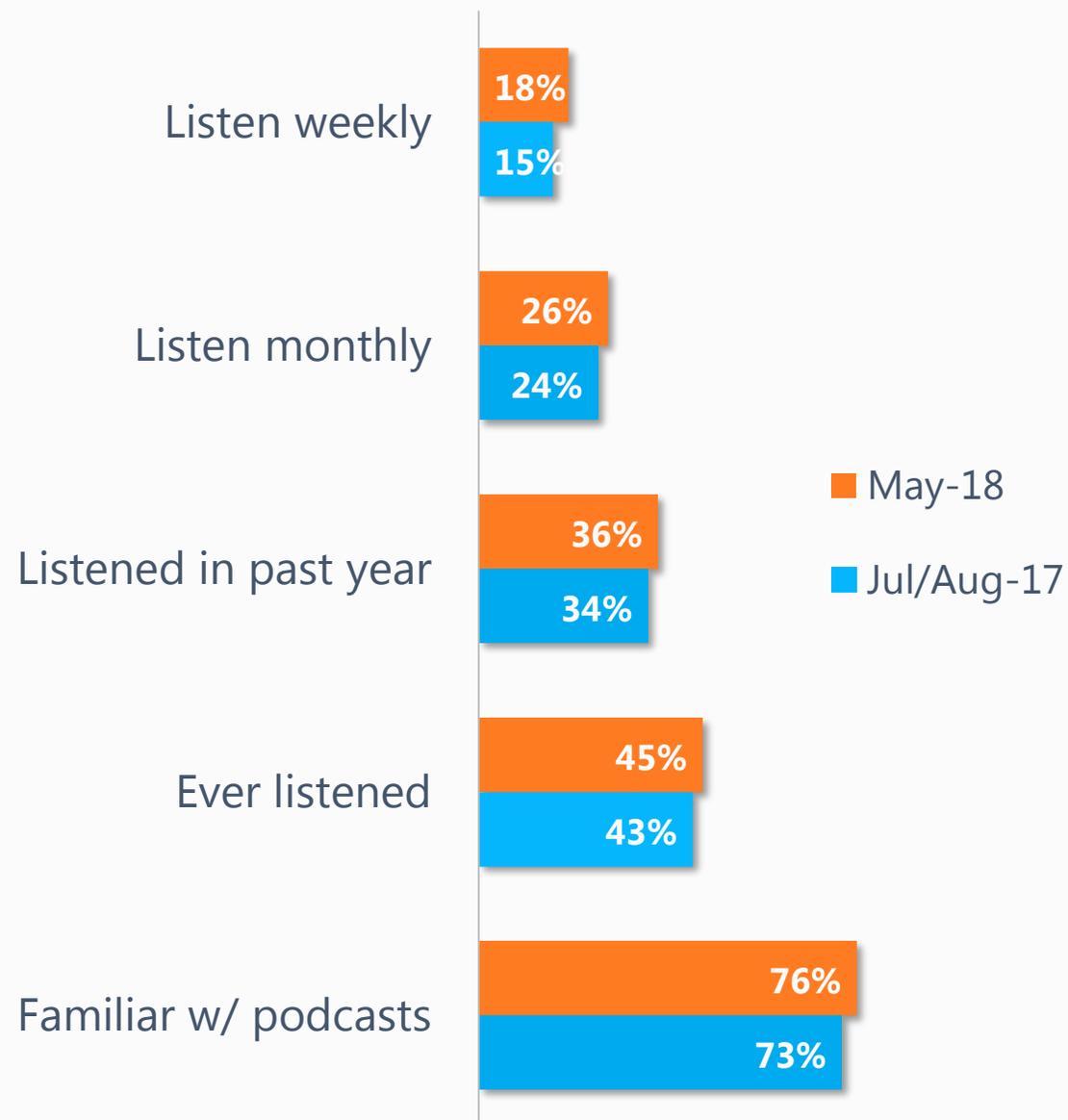
Canadians, aged 18+

On every measure, podcast awareness and usage has grown since last year, with weekly use growing at a faster pace than awareness or sampling.

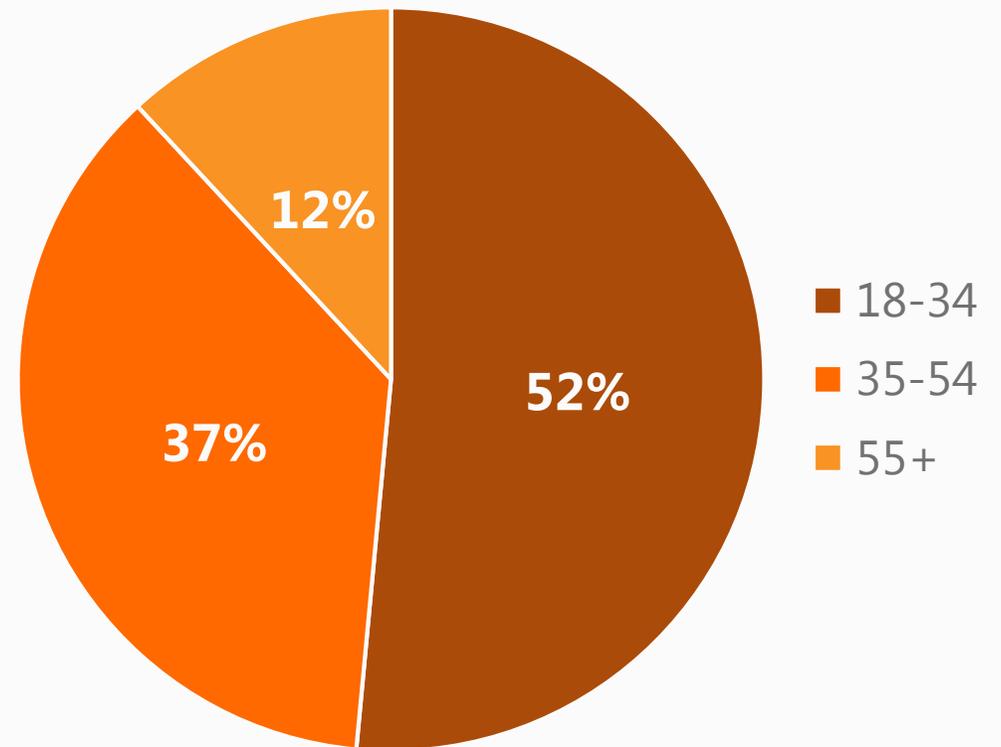
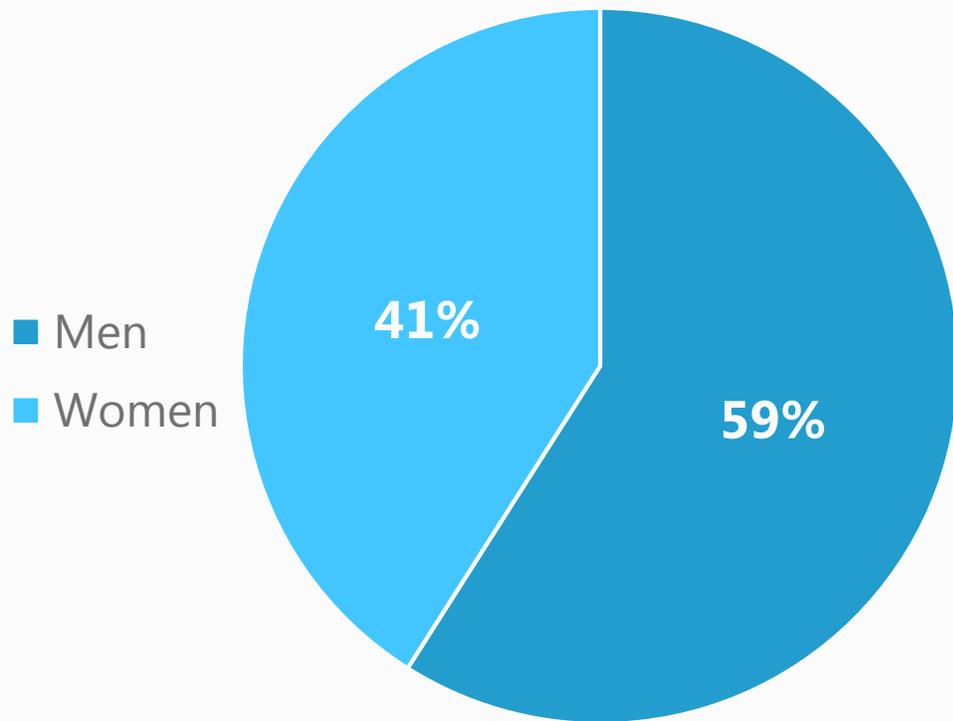
More than 10 million Canadian adults (36% of the 18+ population) have listened to podcasts in the past year. More than 13 million adults (45%) have ever listened.



Source: The Canadian Podcast Listener 2017 & 2018
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)



Monthly Podcast Listeners 2018, by Demo



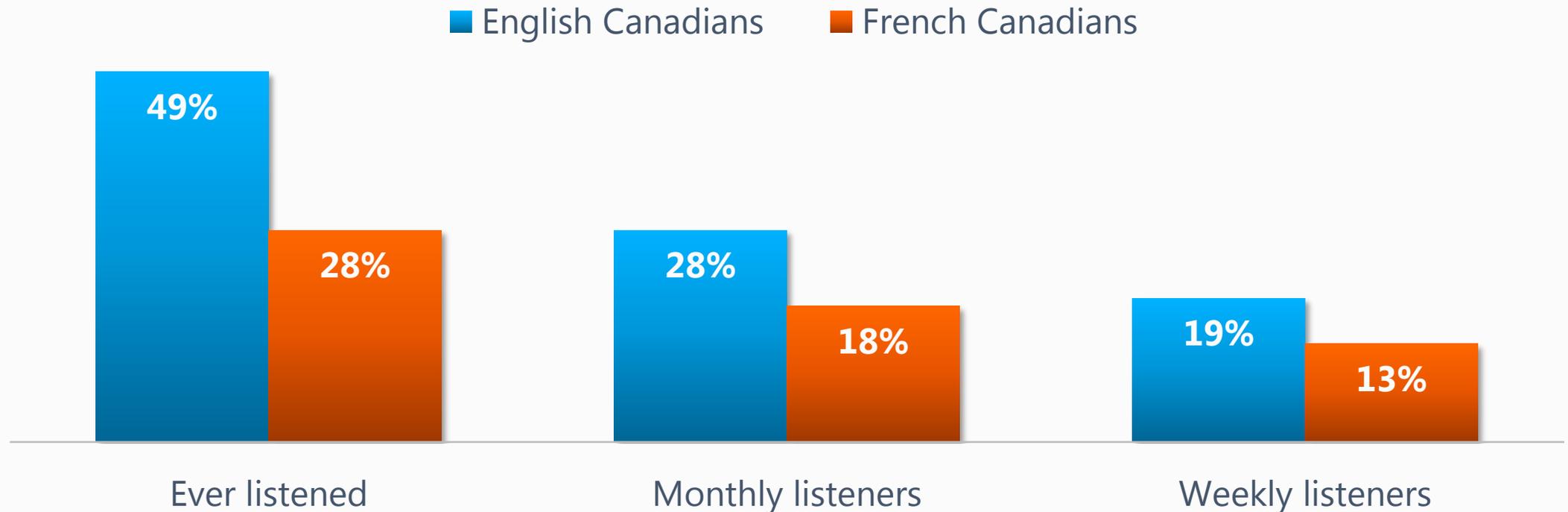
Source: The Canadian Podcast Listener 2017 & 2018

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+ (Jul/Aug 17: n=2,518; May 18: n=3,118)

French-speaking Canadians are much less likely to be podcast listeners.

The sampling barrier is particularly high in French Canada, with French Canadians little more than half as likely as English Canadians to have ever listened to podcasts.

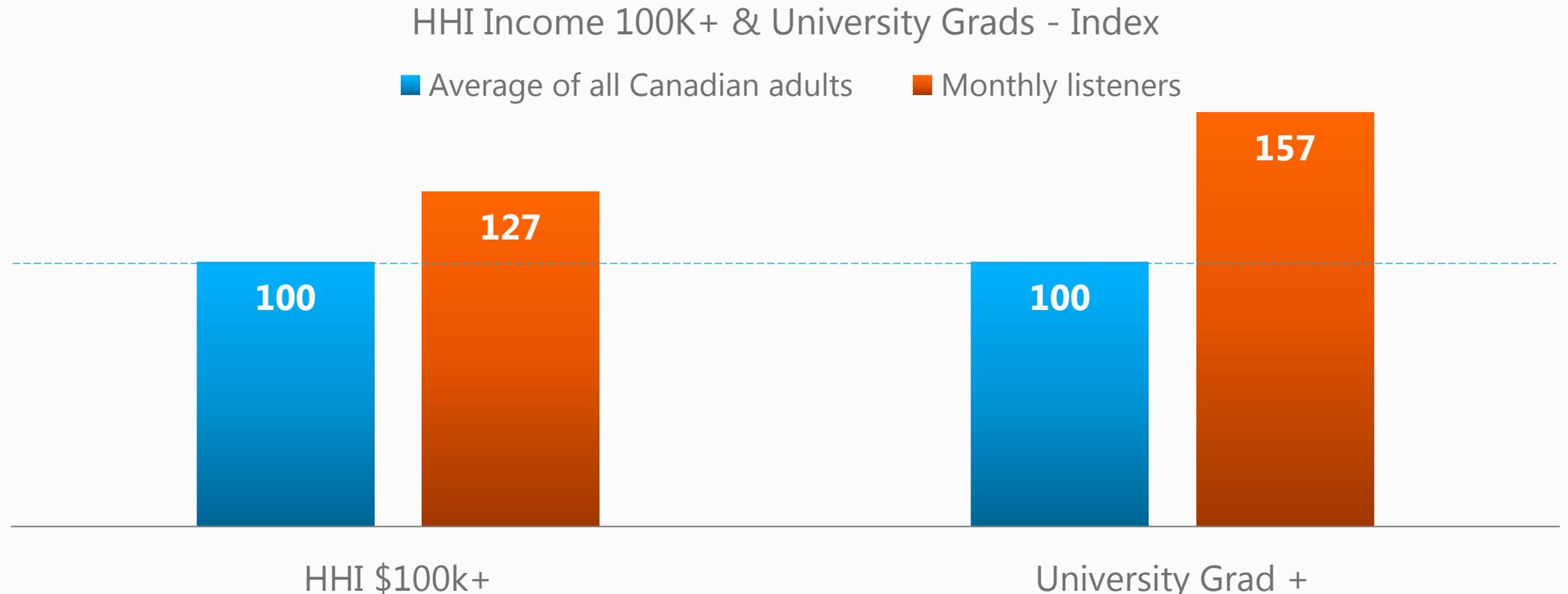


Source: The Canadian Podcast Listener 2018

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

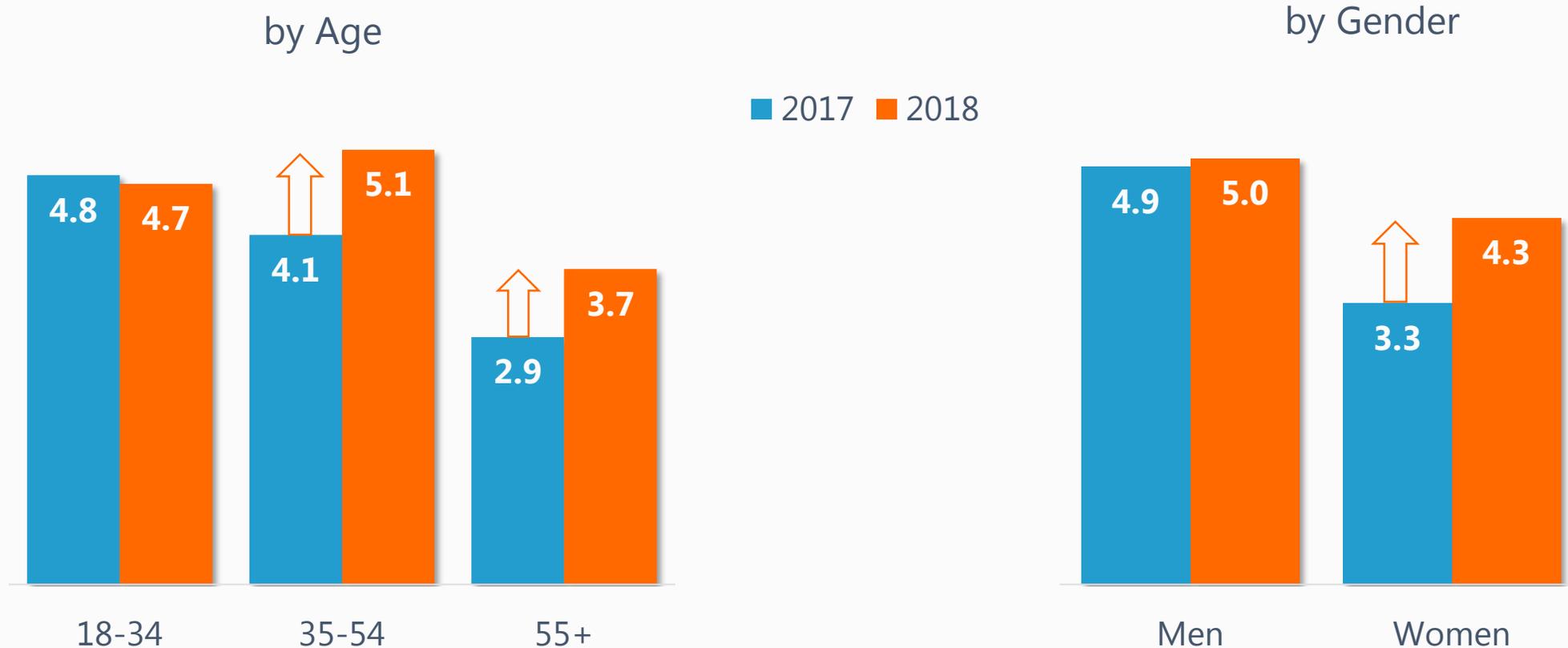
Base: English Canadians, aged 18+ (n=2,554); French Canadians, aged 18+ (n=564)

Podcast listeners have higher income and higher education.



Source: The Canadian Podcast Listener 2018
Base: Canadians Age 18+ (n=3,118); listen to podcasts monthly (n=801)

Female monthly listeners and those aged 35+ are listening to more episodes/week than last year.



Source: The Canadian Podcast Listener 2018

In total, how many podcast episodes would you say you listen to in a typical week

Base: Monthly podcast listeners, A18-34 (2017 n=445) (2018 n=621) A35-54 (2017 n=715) (2018 n=594), A55+ (2017 n=347) (2018 n=317) M18+ (2017 n=810) (2018 n=907) F18+ (2017 n=697) (2018 n=627)

What Podcasts Do Canadians Listen To?

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

This offers insights into what people listen to as opposed to what they download—and how these podcasts vary by various types of listeners.

How Canada's Most Listened to Podcasts Were Identified for the Study

Monthly listeners were asked to name up to 10 podcasts listened to in the past month, as well as their 1st and 2nd favourite podcasts from the past six months.

Responses were coded and matched to the Apple Podcasts list of 500,000+. This in turn allowed us to bring in metadata with genres and publishers.



Source: The Canadian Podcast Listener 2018
Please list up to 10 podcasts you remember listening to in the past month.
Base: Monthly podcast listeners, aged 18+ (n=1,534)

The Long Tail of podcast listening, by the numbers:

- A total of **1,831** unique podcasts were identified as listened in past month by the 1,534 monthly listeners in the survey (1/3 of 1% of the 500,000+ podcasts listed in Apple Podcasts.)
- Of the podcasts named, **546** (just 30%) received more than a single mention.
- Only **86** (or 5%) of the podcasts mentioned were in the French language, despite French-speaking Canadians accounting for 16% of all monthly podcast listeners.

Note: Due to a change in methodology this year, results for podcasts listened to in the past month are not comparable to results from the 2017 study.

Top Genres–Favourite Podcasts

While Comedy is the #1 genre of favourite podcasts for both men and women, other genres vary by gender. Sports & Recreation ranks higher among men and Games & Hobbies, #5 among men, doesn't reach the Top 10 for women. Meanwhile, Health and Arts make the Top 10 only among women.

Men	
1 Comedy	25%
2 Sports & Recreation	16%
3 Society & Culture	15%
4 News & Politics	12%
5 Games & Hobbies	4%
6 TV & Film	4%
7 Technology	3%
8 Science & Medicine	3%
9 Business	3%
10 Religion & Spirituality	3%

Women	
1 Comedy	26%
2 Society & Culture	23%
3 News & Politics	13%
4 Health	8%
5 Science & Medicine	5%
6 Arts	5%
7 Religion & Spirituality	4%
8 TV & Film	4%
9 Sports & Recreation	2%
10 Technology	2%



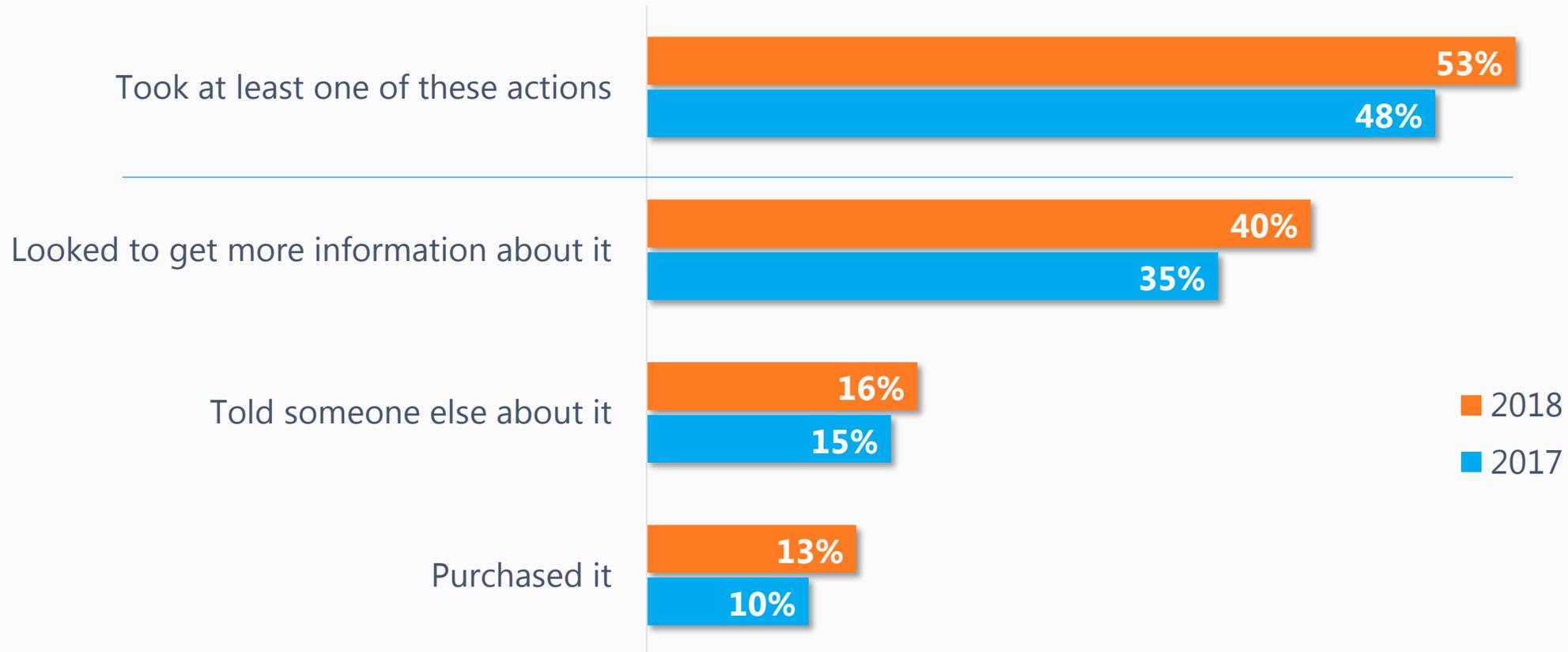
Source: The Canadian Podcast Listener 2018

Now, thinking back over the past 6 months or so, which one podcast would you say was your favourite—the one you enjoyed listening to the most?

Base: Monthly podcast listeners, aged 18+ with a favourite podcast Men (n=617); Women (n=442)

Podcast ads are increasingly motivating action.

More than half of all monthly podcast listeners (53%) say they have taken some kind of action after hearing an ad on a podcast. That's up slightly from 48% a year ago.



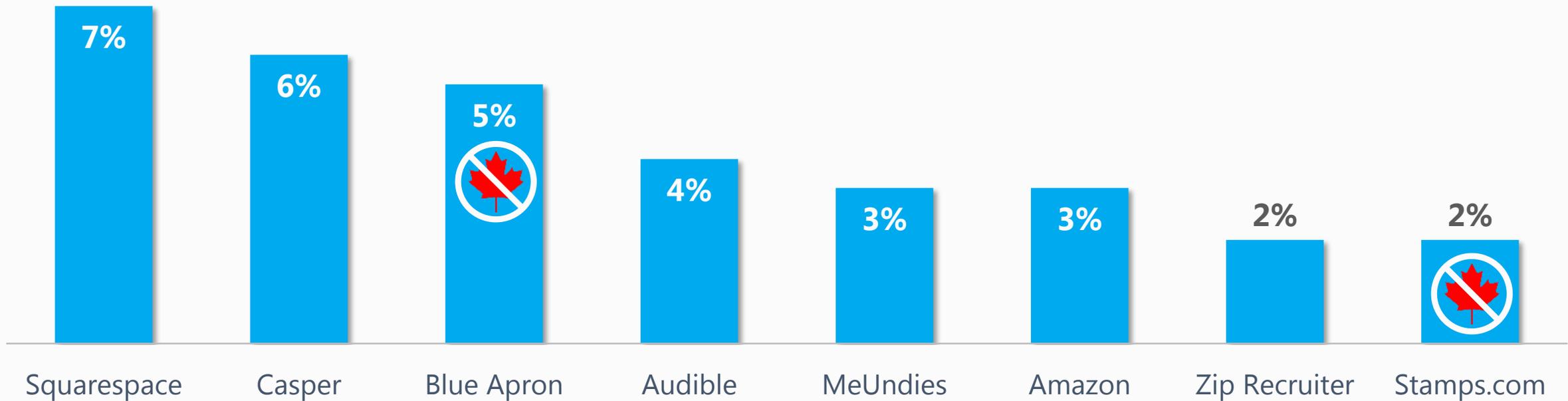
Source: The Canadian Podcast Listener 2018

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+ 2017 (n=1,507) / 2018 (n=1,534)

Brands, Products, Services Recalled from Podcast Ads

Of the Top 8 advertisers that monthly podcast listeners recall hearing on podcasts, two brands (Blue Apron and Stamps.com) are unavailable in Canada.



Source: The Canadian Podcast Listener 2018

Which 3 brands, products and services first come to mind when you think of the advertising on the podcasts you listen to? (Includes only actual advertisers vs. other brands recalled --- e.g., Apple)

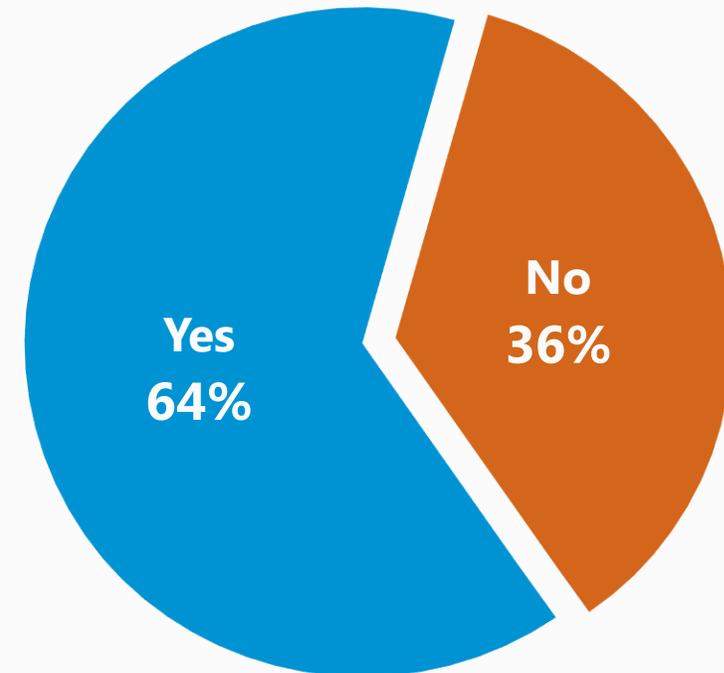
Base: Monthly podcast listeners, aged 18+ (n=1,534)

Wasted advertising?

Nearly two-thirds of podcast listeners who have looked for info they heard on a podcast have come across products/services that aren't available in Canada.

Have Ever Looked For More Info on a Product/Service

"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 2018

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?

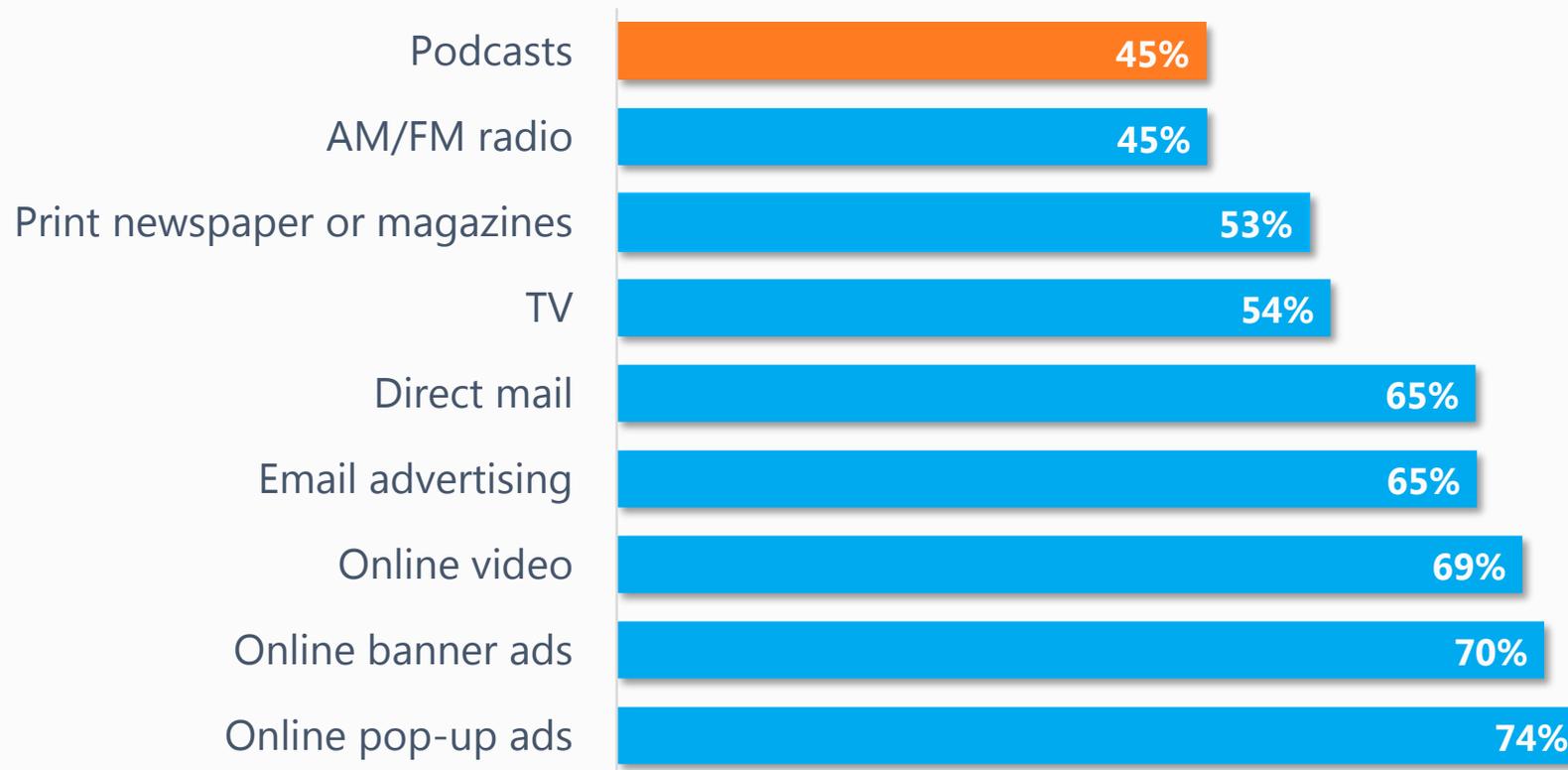
Base: Monthly podcast listeners, aged 18+ (n=1,534) / Looked to get more information (n=574)

Podcast listeners are less likely to say they avoid the ads on podcasts than virtually all other types of ads.

Podcast ads offer many of the benefits of other types of digital advertising (e.g., addressability).

At the same time, they are much *less* likely than other digital advertising to be avoided.

% of Podcast Listeners Who Say They Actively Avoid Ads All or Most of the Time on Each Medium



Source: The Canadian Podcast Listener 2018

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+ (n=1,534)

Takeaways

- Podcast listening in Canada is growing—in reach and in time spent listening.
- Podcasts reach a young, affluent and educated audience.
- Podcasting is a long tail medium—a small number of big podcasts, and 10s of 1000s of niche podcasts targeting specific audiences.
- Podcasts offer a unique, immersive advertising opportunity, with many targeting benefits of other digital ads with less ad avoidance.

Special appreciation to our supporting sponsor:



THE PODCAST EXCHANGE

And our premium subscriber:



For more information on findings in this report,
please contact:

Jeff Vidler, Study Director
Audience Insights Inc.
jeff.vidler@audience-insights.com

Jeff Ulster
Ulster Media
jeffreylulster@gmail.com

canadianpodcastlistener.ca

