In January/February 2018, Edison Research conducted a national telephone survey of 2000 Americans ages 12 and older, using random digit dialing techniques to both cell phones and landlines.

Survey offered in both English and Spanish languages.

Data weighted to national 12+ population figures.
Awareness of the Term “Podcasting”

Total Population 12+

% familiar with the term podcasting

2006: 22%
2007: 37%
2008: 37%
2009: 43%
2010: 45%
2011: 45%
2012: 46%
2013: 46%
2014: 48%
2015: 49%
2016: 55%
2017: 60%
2018: 64%

Estimated 180 Million
Ever Listened to Podcasts

Total Population 12+

% ever listened to a podcast

Estimated 124 Million
Monthly Podcast Listening

Total Population 12+

% listening to a podcast in last month

Estimated 73 Million
Composition of Podcast Consumers

Monthly Podcast Consumers 12+

- Men: 52%
- Women: 48%
Monthly Podcast Listening

% listening to a podcast in last month

Composition of Podcast Consumers

U.S. Population 12+

- Age 12-17: 9%
- Age 18-34: 28%
- Age 35-54: 31%
- Age 55 and older: 32%

Monthly Podcast Consumers 12+

- Age 12-17: 11%
- Age 18-34: 34%
- Age 35-54: 36%
- Age 55 and older: 19%
Monthly Podcast Listening

% listening to a podcast in last month

<table>
<thead>
<tr>
<th>Year</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>2015</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>2016</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td>2017</td>
<td>27%</td>
<td>21%</td>
</tr>
<tr>
<td>2018</td>
<td>27%</td>
<td>24%</td>
</tr>
</tbody>
</table>
Composition of Podcast Consumers

Annual Household Income:

- **U.S. Population 18+**
  - $150K or more: 11%
  - $100K-$150K: 14%
  - $75K-$100K: 13%
  - Under $75K: 38%

- **Monthly Podcast Consumers 18+**
  - $150K or more: 15%
  - $100K-$150K: 20%
  - $75K-$100K: 16%
  - Under $75K: 51%
Composition of Podcast Consumers

Educational Attainment:

<table>
<thead>
<tr>
<th>Educational Attainment</th>
<th>U.S. Population 18+</th>
<th>Monthly Podcast Consumers 18+</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School or less</td>
<td>28%</td>
<td>17%</td>
</tr>
<tr>
<td>One to three years of college</td>
<td>28%</td>
<td>22%</td>
</tr>
<tr>
<td>Four-year college degree</td>
<td>21%</td>
<td>27%</td>
</tr>
<tr>
<td>Some grad school or advanced degree</td>
<td>23%</td>
<td>34%</td>
</tr>
</tbody>
</table>
Composition of Podcast Consumers

Employment Status:

- **U.S. Population 12+**
  - Employed full-time: 45%
  - Employed part-time: 9%
  - Temporarily unemployed: 5%
  - Homemaker: 5%
  - Retired: 19%
  - Student: 14%

- **Monthly Podcast Consumers 12+**
  - Employed full-time: 54%
  - Employed part-time: 10%
  - Temporarily unemployed: 5%
  - Homemaker: 6%
  - Retired: 8%
  - Student: 14%
Weekly Podcast Listening

Total Population 12+

% listening to a podcast in last week

- 2013: 7%
- 2014: 8%
- 2015: 10%
- 2016: 13%
- 2017: 15%
- 2018: 17%

Estimated 48 Million
Average Time “Weekly Podcast Listeners” Spend Listening to Podcasts

Weekly Podcast Consumers 12+

Mean: 6 hours 37 minutes

- 1 hour to less than 3 hours: 25%
- 3 hours to less than 5 hours: 25%
- 5 hours to less than 10 hours: 16%
- 10 hours or more: 17%
- Don't know: 1%
- Less than one hour: 16%
Number of Podcasts Listened to in Last Week

Weekly Podcast Consumers 12+

- One: 18%
- Two: 17%
- Three: 13%
- Four or Five: 20%
- Six to Ten: 17%
- 11 or more: 14%
- Don't know: 1%

Average of seven podcasts listened per week
Device Monthly Podcast Consumers Use Most Often to Listen to Podcasts

Monthly Podcast Consumers 12+

- Computer
- Smartphone/tablet/portable device

<table>
<thead>
<tr>
<th>Year</th>
<th>Computer</th>
<th>Smartphone/tablet/portable device</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>2014</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>2015</td>
<td>36%</td>
<td>64%</td>
</tr>
<tr>
<td>2016</td>
<td>29%</td>
<td>71%</td>
</tr>
<tr>
<td>2017</td>
<td>31%</td>
<td>69%</td>
</tr>
<tr>
<td>2018</td>
<td>24%</td>
<td>76%</td>
</tr>
</tbody>
</table>
Years Listening to Podcasts

“For how long have you been listening to podcasts?”

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Ever listened to a podcast</th>
<th>Monthly Podcast Consumers</th>
<th>Weekly Podcast Consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 years or more</td>
<td>16%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>3 years to &lt; 5 years</td>
<td>16%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>1 year to &lt; 3 years</td>
<td>31%</td>
<td>33%</td>
<td>31%</td>
</tr>
<tr>
<td>6 months to &lt; 1 year</td>
<td>15%</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Less than 6 months</td>
<td>22%</td>
<td>19%</td>
<td>16%</td>
</tr>
</tbody>
</table>
Podcast Listening Locations

“Have you ever listened to a podcast…?”

Monthly Podcast Consumers 12+

- At home: 82%
- In a car/truck: 58%
- Walking around/On foot: 41%
- At work: 34%
- At a gym/Working out: 29%
- Riding public transportation: 28%

% ever listen to podcasts in location
Where are Podcasts Most Often Listened to?

- **At home**: 48%
- **In a car/truck**: 26%
- **At work**: 12%
- **At a gym or while exercising**: 4%
- **Other**: 10%

Monthly Podcast Consumers 12+
Amount of Podcast Episode Listened to

Monthly Podcast Consumers 12+

- Entire podcast episode: 43%
- Most of the podcast: 44%
- Less than half the podcast: 10%
- Just the beginning of the podcast: 3%
“Do you ever increase the speed of your podcasts in order to listen to them faster?”

- Yes: 19%
- No: 81%

Base: Monthly Podcast Consumers 12+
## Increasing Podcast Playback Speed

<table>
<thead>
<tr>
<th>Category</th>
<th>Yes (%)</th>
<th>No (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly Podcast Consumers 12+</td>
<td>19%</td>
<td>81%</td>
</tr>
<tr>
<td>Men</td>
<td>20%</td>
<td>80%</td>
</tr>
<tr>
<td>Women</td>
<td>18%</td>
<td>82%</td>
</tr>
<tr>
<td>Age 12-17</td>
<td>24%</td>
<td>76%</td>
</tr>
<tr>
<td>Age 18-34</td>
<td>19%</td>
<td>81%</td>
</tr>
<tr>
<td>Age 35-54</td>
<td>21%</td>
<td>79%</td>
</tr>
<tr>
<td>Age 55+</td>
<td>12%</td>
<td>88%</td>
</tr>
</tbody>
</table>

Base: Monthly Podcast Consumers 12+
Increasing Podcast Playback Speed

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly Podcast Consumers 12+</td>
<td>19%</td>
<td>81%</td>
</tr>
<tr>
<td>Weekly Podcast Listeners 12+</td>
<td>20%</td>
<td>80%</td>
</tr>
<tr>
<td>Listened to 1-3 podcasts in the last week</td>
<td>15%</td>
<td>85%</td>
</tr>
<tr>
<td>Listened to 4-5 podcasts in the last week</td>
<td>31%</td>
<td>69%</td>
</tr>
<tr>
<td>Listened to 6 or more podcasts in the last week</td>
<td>23%</td>
<td>77%</td>
</tr>
</tbody>
</table>

Base: Monthly Podcast Consumers 12+
### Social Media Brand Usage

<table>
<thead>
<tr>
<th>Social Media Brand</th>
<th>U.S. Population 12+</th>
<th>Monthly Podcast Consumers 12+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Social Media Brand</td>
<td>77%</td>
<td>93%</td>
</tr>
<tr>
<td>Facebook</td>
<td>62%</td>
<td>70%</td>
</tr>
<tr>
<td>Instagram</td>
<td>36%</td>
<td>54%</td>
</tr>
<tr>
<td>Pinterest</td>
<td>31%</td>
<td>48%</td>
</tr>
<tr>
<td>Snapchat</td>
<td>31%</td>
<td>43%</td>
</tr>
<tr>
<td>Twitter</td>
<td>21%</td>
<td>34%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>22%</td>
<td>34%</td>
</tr>
</tbody>
</table>

**% currently ever use social media brand**
Smart Speaker Awareness

- **Amazon Alexa**: 71% U.S. Population 12+; 86% Monthly Podcast Consumers 12+
- **Google Home**: 56% U.S. Population 12+; 72% Monthly Podcast Consumers 12+
Smart Speaker Ownership

% owning either Amazon Alexa or Google Home devices

- 2018: 18% U.S. Population 12+ 30% Monthly Podcast Consumers 12+
Smart Speaker Ownership

Own a Smart Speaker

Total 12+ Population

- Own Amazon Alexa, no Google: 73%
- Own Amazon Alexa and Google: 11%
- Own Google, no Alexa: 17%

Monthly Podcast Consumers 12+

- Own Amazon Alexa, no Google: 78%
- Own Amazon Alexa and Google: 9%
- Own Google, no Alexa: 13%
Methodology

1,620 via online survey
- 800 Smart Speaker owners
- 820 Non-owners
- Adults 18+
- Data weighted to Smart Speaker owner estimates from Infinite Dial 2017

15 in-home interviews with Smart Speaker owners
% using Smart Speaker regularly for the following:

<table>
<thead>
<tr>
<th>Activity</th>
<th>% Using</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music</td>
<td>68</td>
</tr>
<tr>
<td>Weather</td>
<td>58</td>
</tr>
<tr>
<td>General question</td>
<td>52</td>
</tr>
<tr>
<td>News</td>
<td>45</td>
</tr>
<tr>
<td>Timers/Alarms</td>
<td>43</td>
</tr>
<tr>
<td>Check the time</td>
<td>43</td>
</tr>
<tr>
<td>AM/FM music radio</td>
<td>38</td>
</tr>
<tr>
<td>Control Devices</td>
<td>33</td>
</tr>
<tr>
<td>AM/FM news/talk</td>
<td>32</td>
</tr>
<tr>
<td>Add to to-do list</td>
<td>26</td>
</tr>
<tr>
<td>Sports update</td>
<td>26</td>
</tr>
<tr>
<td>Add to shopping list</td>
<td>26</td>
</tr>
<tr>
<td>Traffic</td>
<td>24</td>
</tr>
<tr>
<td>Access calendar</td>
<td>23</td>
</tr>
<tr>
<td>Jokes</td>
<td>22</td>
</tr>
<tr>
<td>AM/FM sports radio</td>
<td>22</td>
</tr>
<tr>
<td>Cooking requests</td>
<td>18</td>
</tr>
<tr>
<td>Games</td>
<td>18</td>
</tr>
<tr>
<td>Podcasts</td>
<td>17</td>
</tr>
<tr>
<td>Stock prices</td>
<td>16</td>
</tr>
<tr>
<td>Translate</td>
<td>14</td>
</tr>
<tr>
<td>Audiobooks</td>
<td>14</td>
</tr>
<tr>
<td>Read to children</td>
<td>14</td>
</tr>
<tr>
<td>Find local businesses</td>
<td>13</td>
</tr>
<tr>
<td>Order food</td>
<td>13</td>
</tr>
<tr>
<td>Lead a workout</td>
<td>12</td>
</tr>
<tr>
<td>Order an item</td>
<td>10</td>
</tr>
<tr>
<td>Flight information</td>
<td>10</td>
</tr>
</tbody>
</table>

Base: Smart Speaker owners
### % using Smart Speaker regularly for the following:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Music</td>
<td>72%</td>
</tr>
<tr>
<td>Weather</td>
<td>61%</td>
</tr>
<tr>
<td>General question</td>
<td>56%</td>
</tr>
<tr>
<td>News</td>
<td>48%</td>
</tr>
<tr>
<td>Timers/Alarms</td>
<td>48%</td>
</tr>
<tr>
<td>Check the time</td>
<td>48%</td>
</tr>
<tr>
<td>AM/FM music radio</td>
<td>43%</td>
</tr>
<tr>
<td>Control Devices</td>
<td>39%</td>
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<tr>
<td>AM/FM news/talk</td>
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<tr>
<td>Add to to-do list</td>
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<tr>
<td>Add to shopping list</td>
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<tr>
<td>Traffic</td>
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<tr>
<td>Access calendar</td>
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<td>Podcasts</td>
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<tr>
<td>Cooking requests</td>
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<tr>
<td>Jokes</td>
<td>23%</td>
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<td>Games</td>
<td>21%</td>
</tr>
<tr>
<td>Stock prices</td>
<td>19%</td>
</tr>
<tr>
<td>Audiobooks</td>
<td>19%</td>
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<tr>
<td>Read to children</td>
<td>19%</td>
</tr>
<tr>
<td>Lead a workout</td>
<td>18%</td>
</tr>
<tr>
<td>Translate</td>
<td>18%</td>
</tr>
<tr>
<td>Order food</td>
<td>18%</td>
</tr>
<tr>
<td>Find businesses</td>
<td>17%</td>
</tr>
<tr>
<td>Order an item</td>
<td>14%</td>
</tr>
<tr>
<td>Flight information</td>
<td>14%</td>
</tr>
</tbody>
</table>

Base: Smart Speaker owners
Share of Ear®

Americans’ Share of Time Spent Listening to Audio Sources:

[Edison Research logo]
Share of Ear®

- 5,538 respondents
  - Completed 24-hour audio listening diary
- National sample 13+
- Online and offline
- Offered in English and Spanish
- Quarterly data collection and updates
Over 5,000 one-day audio diaries completed through Q1 2018
On average, people spend 4 hours listening to audio
Share of Ear®

Americans’ 13+ Share of Time Spent Listening to Audio Sources

- AM/FM Radio: 50%
- Streaming Audio: 16%
- Owned Music (CDs, Digital music files, etc.): 14%
- SiriusXM: 8%
- TV Music Channels: 5%
- Podcasts: 4%
- Other: 3%

AM/FM Radio includes over the air and radio streams
Streaming Audio includes pure plays such as Pandora, Spotify, and others

Source: Edison Research. Americans spend an average of 3 hours and 49 minutes each day consuming audio. This graph represents the share of time spent with each. Based on a nationally representative sample of 5,538 Americans ages 13+ who completed a 24-hour audio listening diary. For more information contact info@edisonresearch.com
Podcast Listeners’ Share of Time Spent Listening to Audio Sources

- Podcasts: 33%
- AM/FM Radio: 25%
- Streaming Audio: 14%
- Owned Music (CDs, Digital music files, etc.): 15%
- SiriusXM: 5%
- TV Music Channels: 5%
- Other: 3%

Source: Edison Research. Podcast Listeners (defined as those who reported listening to a podcast in the last 24 hours) spend an average of 5 hours and 50 minutes each day consuming audio. This graph represents the share of time Podcast Listeners spent with each audio source. Based on a nationally representative sample of 5,538 Americans ages 13+ who completed a 24-hour audio listening diary. Contact info@edisonresearch.com

AM/FM Radio includes over the air and radio streams
Streaming Audio includes pure plays such as Pandora, Spotify, and others
Share of Ear®

Americans’ 13+ Share of Time Spent Listening to Podcasts Over Time

Quarter 1 2014: 2
Quarter 1 2018: 4

Source: Edison Research Share of Ear. Contact: info@edisonresearch.com
Americans’ 13+ Audio Listening by Device

- AM/FM Radio Receiver: 47%
- Mobile Device: 23%
- Computer: 10%
- SiriusXM Receiver: 6%
- TV Audio Channels: 6%
- CD Player: 4%
- Internet Connected TV/Device: 1%
- Smart Speaker: 1%
- Other: 2%

Source: Edison Research Share of Ear. Based on a nationally representative sample of 5,538 Americans ages 13+ who completed a 24-hour audio listening diary. Contact: info@edisonresearch.com
Share of Ear®

Americans’ 13+ Audio Listening by Device

Mobile Device 23%

Source: Edison Research Share of Ear. Based on a nationally representative sample of 5,538 Americans ages 13+ who completed a 24-hour audio listening diary. Contact: info@edisonresearch.com
Share of Ear®

Podcast Listeners’ 13+
Audio Listening by Device

- Mobile Device: 44%
- AM/FM Radio Receiver: 20%
- Computer: 20%
- SiriusXM Receiver: 3%
- TV Audio Channels: 4%
- CD Player: 2%
- Internet Connected TV/Device: 2%
- Smart Speaker: 3%
- Other: 2%

Source: Edison Research Share of Ear. Based on a nationally representative sample of 5,538 Americans ages 13+ who completed a 24-hour audio listening diary. Contact: info@edisonresearch.com
40% listened to audio on a smartphone in a day
Share of Ear®

Americans’ 13+ Share of Time Spent Listening to Audio Sources on a Smartphone

- Streaming Audio: 39%
- Owned Music: 33%
- Podcasts: 11%
- AM/FM Radio: 8%
- SiriusXM: 4%
- Other: 5%

Source: Edison Research Share of Ear®. Based on a nationally representative sample of 5,538 Americans ages 13+ who completed a 24-hour audio listening diary. Contact: info@edisonresearch.com
Share of Ear®

Americans’ 13-34 Share of Time Spent Listening to Audio Sources on a Smartphone

- Streaming Audio: 43%
- Owned Music: 37%
- Podcasts: 10%
- Other: 4%
- AM/FM Radio: 5%
- SiriusXM: 1%

Source: Edison Research Share of Ear. Based on a nationally representative sample of 5,538 Americans ages 13+ who completed a 24-hour audio listening diary. Contact: info@edisonresearch.com
The Podcast Consumer - Summary

- Podcasting’s Share® of Ear has doubled in 4 years - a significant shift.

- In-car listening is growing, and represents a major potential source of new listening.
The Podcast Consumer - Summary

- Nearly four in ten Americans 12+ are familiar with the term podcasting but are not regular listeners. Finding out why is imperative.

- There is tremendous opportunity to grow with persons 55+.
Podcast producers need to make it easy for consumers to access their content on smart speakers.