

# A-LIST(EN)ERS

THE POWER OF UK PODCASTING - 2019



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The Podcast Strategists  
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01

# INTRODUCTION



# WE ARE 4DC

4DC is a global end-to-end strategic podcast consultancy. Launched in December 2018, 4DC is one of five communications companies housed within the markettiers4dc group and offers unique, full-service podcast creation and distribution strategy; with a focus on building audience reach and engagement.

4DC offers three levels of service:

- 4DC PREMIUM** A full service package of development, creation and distribution strategy
- 4DC LITE** Creation of branded content through narrative and audio technical expertise
- 4DC OUTREACH** Development of the strategy and execution to reach audience through third party podcasts



HOWARD KOSKY, 4DC

# INTRODUCING THE A-LIST(EN)ERS



**HOWARD KOSKY**  
CO-FOUNDER - 4DC

Podcasts are going mainstream. Content is multiplying and listenership increasing, while breakout hosts and titles are becoming household names.

Despite the power and potential, however, most brands are yet to explore the genre as a vehicle for awareness, growth and success.

As a global consultancy, 4DC is watching as podcasts become a staple of life for listeners all over the world. And in our debut report we shine our spotlight on the UK to showcase the potential value in reaching those listeners and in embracing a maturing, blooming podcast market.

Our data tells the story of a switched-on, high-spend, discerning, connected audience: listeners and customers who are ready and willing to engage with brands through a special kind of medium. Brands need to see that early-bird potential like this doesn't come around often.

So come and meet the A-Listeners, an audience that's unique and multiplying; that's active, loyal and connected. And whose spend power has to be broken down to be believed.

But there's more to A-Listeners than just spend power. You'll soon see that podcast fans' tastes, patterns and expectations diverge from the norm.

The relatively small number of brands that do rely on podcasting know they must tread carefully to respect the microclimate of the genre: the unique relationships between host and listener, people's motivations for tuning in, and the delicate balance when using the platform to promote and to sell.

## AVERAGE ANNUAL SPEND BY CATEGORY

### PODCAST LISTENERS VS. NON-LISTENERS



DIFFERENCE

#### PROTECTION & HEALTH



#### IN-HOME



#### FOOD & DRINK



#### ENTERTAINMENT & TRAVEL



SOURCE: 4DC





HOWARD KOSKY, 4DC

# INTRODUCING THE A-LIST(EN)ERS

To create this report, 4DC commissioned proprietary research. The research was conducted by Opinion Matters, with 3,126 respondents (1,112 non-podcast listeners and 2,014 podcast listeners) aged 16+ in GB between 08.03.2019 - 13.03.2019.

For comparison, or to fill any data blanks, we look to other markets - primarily the USA - to understand, predict and speculate as to how the UK podcasting scene might develop. More details on sources can be found in the appendix.

## HIGHLIGHTS OF THIS REPORT

4DC DATA SHOWS PODCAST LISTENERS SERIOUSLY OUTSPEND NON-LISTENERS IN EVERY CONSUMER AREA



VALUE OF PODCAST LISTENERS CURRENTLY UNDERSOLD DESPITE SUCCESS METRICS THAT TROUNCE OTHER MEDIA



IN PODCASTING'S CORE 25-34 AGE GROUP, LISTENERS OUTSPEND NON-LISTENERS BY AS MUCH AS 99% ON NON-ESSENTIALS



EVOLVING LANDSCAPE MAKES NOW THE PERFECT TIME FOR UK BRANDS TO INVEST



PODCAST LISTENERS ARE MORE ACTIVE ON SOCIAL MEDIA THAN PUBLIC-AT-LARGE, AND MORE LIKELY TO REMEMBER AND ENGAGE WITH PODCAST ADVERTISERS



GIVEN THE UTTERLY UNIQUE RELATIONSHIPS BETWEEN HOST AND LISTENER - ADVERTISING IS AN EXTREMELY FINE LINE



4DC DATA SHOWS MAJORITY SEE PODCASTS AS A MORE EFFECTIVE ADVERTISING PLATFORM THAN TRADITIONAL VEHICLES



UK PODCAST EVOLUTION RESEMBLES US PATTERNS BUT NEW TRENDS AND TECH BREAKTHROUGHS ARE EMERGING ALL THE TIME



SOURCE: 4DC

SOURCES:  
4DC



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05

A-List(en)ers - The Power of UK Podcasting - 2019



02

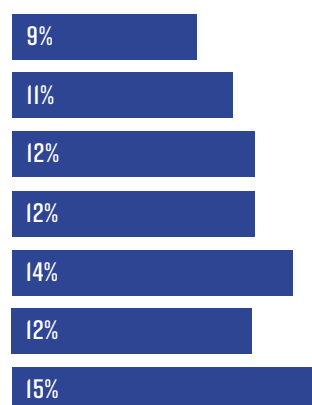
# PODCAST LISTENERS' PURCHASE POWER



# FROM ASSUMPTIONS TO FACTS

**IN PODCASTING THE UK IS FIVE YEARS BEHIND THE US.  
BUT RATHER THAN WAIT-AND-SEE, BRAND SHOULD ACT NOW.**

## THE GROWTH OF US PODCAST LISTENERS 2008 - 2014



SOURCE: Edison



As you can see, podcasting in the UK is probably five years behind the US.

2008

But rather than watching the calendar and waiting on evolution, brands need to see opportunity in the here and now.

2009

2010

2011

2012

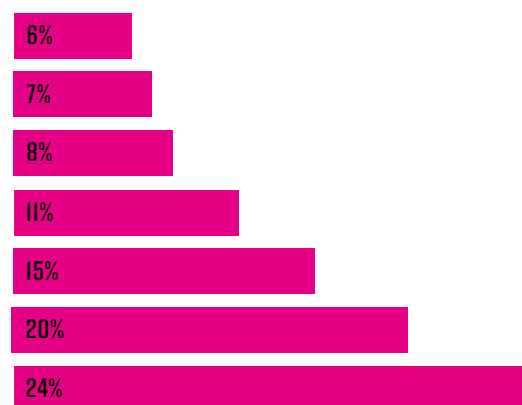
2013

2014

Turning skeptical UK brands into believers means firming up widely-held assumptions and building a case made of facts. Our proprietary data starts that journey.

In the following pages we call out the spend trends of the audience-at-large to compare podcast listeners and non listeners across a range of products and verticals.

## UK PODCAST MARKET GROWTH 2015 - 2021



SOURCE: 4DC, Ofcom



Brands have long assumed that podcast listeners have a little more spend power - but the following pages dramatically double down on that as a fact.

2015

2016

2017

2018

2019 (EST)

2020 (EST)

2021 (EST)

As well as showing the gulf in spend for the general audience, we pull out millennials (25-34) for two primary reasons.

One, podcasting's biggest growth demographic is late teens and early twenties, but millennials are still the genre's core audience.

And two, this age group generally, not always, represents more disposable income, yet stereotypically millennials are viewed as hard to reach, disloyal and fickle.

Regardless of whether that's true, brands simply can't afford to dismiss spend power like this.

SOURCES:

Ofcom.org

RAJAR Midas Audio Survey 2018

Reuters Institute Digital News Report 2018

Edison - The Podcast Consumer 2019



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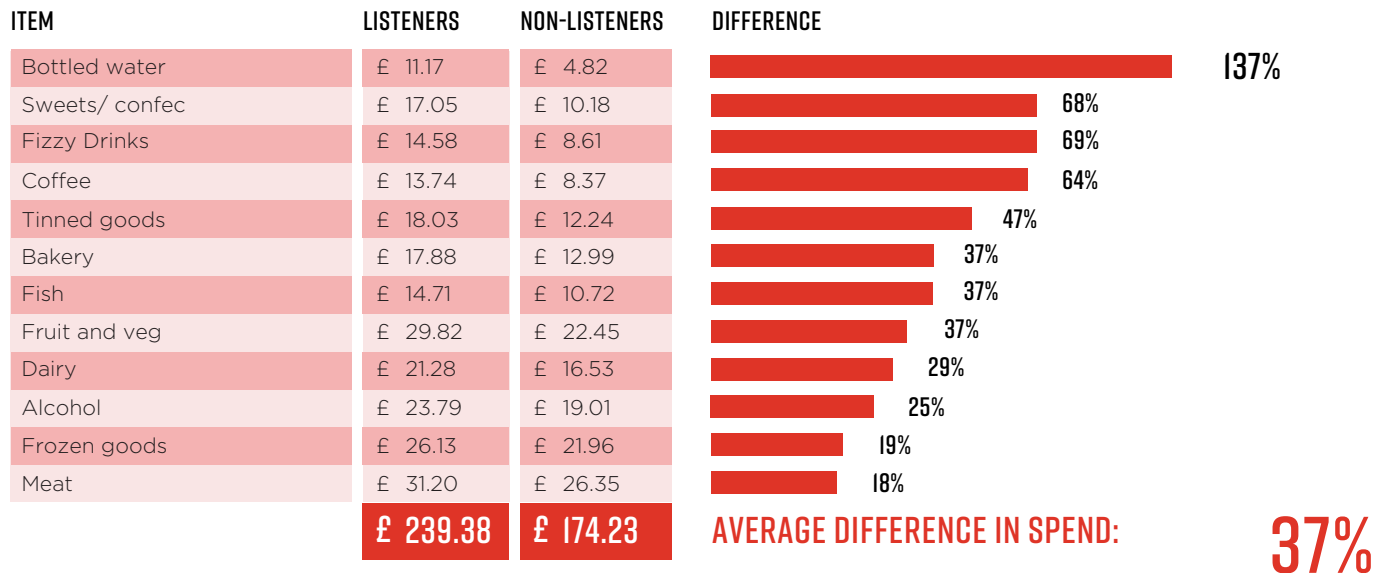


# PODCAST LISTENERS' PURCHASE POWER

## FOOD & DRINK



### AVERAGE SPEND PER MONTH - TOTAL POPULATION



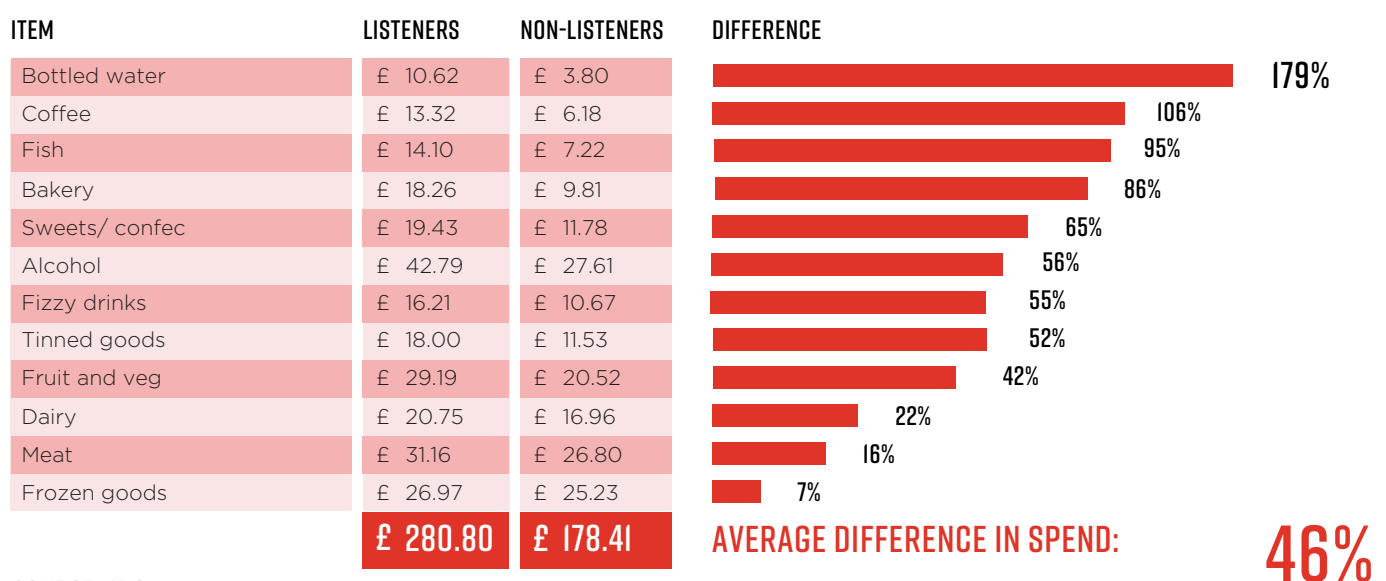
SOURCE: 4DC



Food retailers are fully aware of millennials' spend power but traditionally struggle to engender loyalty in a group reared on choice. The fact that podcast-listening millennials spend 20% more than the general podcast audience, and nearly double their non-podcast peers, underlines the fact that they're a live-or-die demographic FMCG companies need to engage.

At the end of this section you'll meet data showing how invested, informed and "involved" podcasts listeners are when it comes to their food choices.

### AVERAGE SPEND PER MONTH - AGE GROUP 25-34



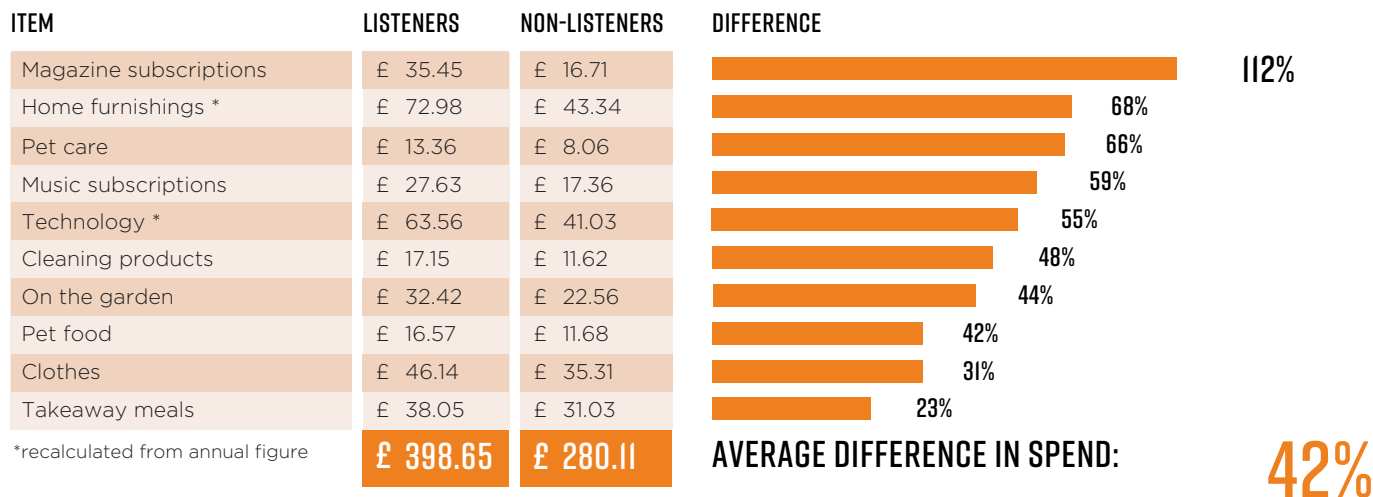
SOURCE: 4DC



# PODCAST LISTENERS' PURCHASE POWER IN-HOME



## AVERAGE SPEND PER MONTH - TOTAL POPULATION

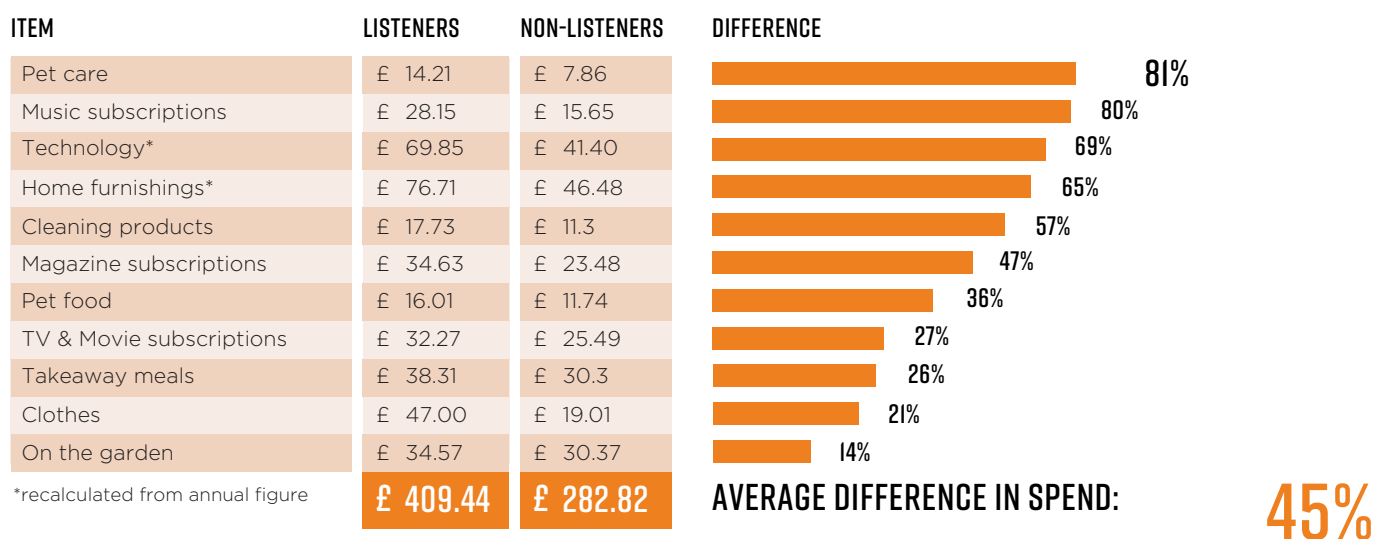


SOURCE: 4DC



In 2019, 30 is the average age Brits buy their first homes and first become parents. Those facts go some way to explaining why millennial in-home spend - that of podcast-listeners at least - is slightly higher than the general sample. But the reasons why their spend is nearly double that of non-podcast listeners in the same age group points at more disposable income and perhaps a different set of priorities.

## AVERAGE SPEND PER MONTH - AGE GROUP 25-34



SOURCE: 4DC

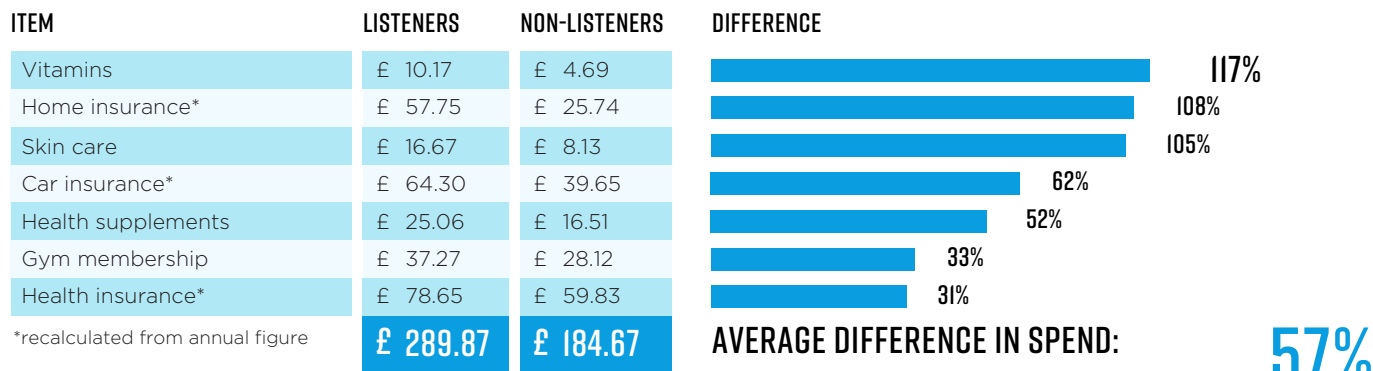


# PODCAST LISTENERS' PURCHASE POWER

## PROTECTION & HEALTH



### AVERAGE SPEND PER MONTH - TOTAL POPULATION



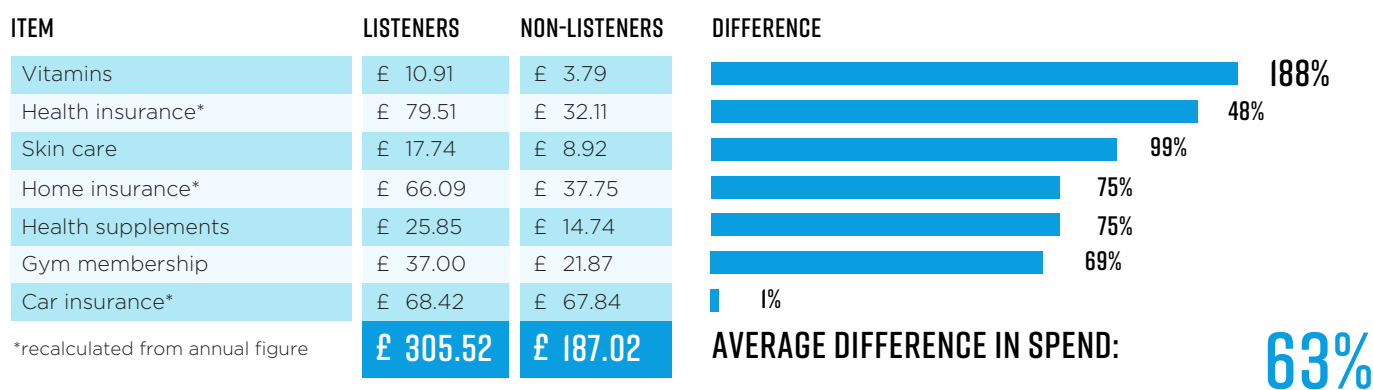
SOURCE: 4DC



The 1% difference in car insurance spend between millennial listeners and non listeners masks the true gap between the two sets. As car insurance is mandatory - and youngsters are savvy enough to price hunt - this list's non-essentials better reflect the gulf between listeners and non-listeners.

In fact, remove car insurance from this list and the spending gap averages out at 99%.

### AVERAGE SPEND PER MONTH - AGE GROUP 25-34



SOURCE: 4DC



# PODCAST LISTENERS' PURCHASE POWER

## ENTERTAINMENT & TRAVEL



### AVERAGE SPEND PER MONTH - TOTAL POPULATION



ITEM	LISTENERS	NON-LISTENERS	DIFFERENCE
Cinema	£ 27.76	£ 21.79	27%
Petrol	£ 78.82	£ 67.45	17%
Gigs	£ 35.16	£ 30.57	15%
Dining out	£ 50.04	£ 43.88	14%
Gambling	£ 43.50	£ 39.56	10%
Drinking out	£ 38.35	£ 37.94	1%
Holidays*	£ 145.92*	£ 160.08*	-9%
	<b>£ 419.56</b>	<b>£ 401.27</b>	

\*recalculated from annual figure

AVERAGE DIFFERENCE IN SPEND:

5%

SOURCE: 4DC



Active, busy, social - both millennial sets show more out-of-home spending than the audience at large. But with millennial podcast listeners spending over a third more than non-listener peers, brands promoting experience, entertainment, drinks and travel would do well to engage.

### AVERAGE SPEND PER MONTH - AGE GROUP 25-34



ITEM	LISTENERS	NON-LISTENERS	DIFFERENCE
Gigs	£ 36.22	£ 20.46	77%
Drinking out	£ 38.79	£ 25.73	51%
Petrol	£ 50.55	£ 37.12	36%
Holidays*	£ 129.95	£ 95.60	36%
Cinema	£ 28.37	£ 21.34	33%
Dining out	£ 39.29	£ 29.79	32%
Gambling	£ 79.63	£ 64.55	23%
	<b>£ 402.80</b>	<b>£ 254.59</b>	

\*recalculated from annual figure

AVERAGE DIFFERENCE IN SPEND:

37%

SOURCE: 4DC



# PODCAST LISTENERS' PURCHASE POWER

## A WORD ON GEN Z

A special word should also go to Gen Z (loosely 16-24), the youngest demographic polled in 4DC's research. If brands see millennials as troublesome to engage, this group is even more elusive.

It should be said that the difference in spending between 16-24 listeners and non-listeners is much less pronounced than in 25-34 year olds. On the surface we can appreciate that, at this age, careers are immature and many are still in some form of education. There mightn't be piles of disposable income to splash around.

Still, more often than not - on everyday items and those 21st century tech essentials - there is a sizeable spending gap between the two.

### AVERAGE SPEND PER MONTH - TOTAL



CATEGORY	LISTENERS	NON-LISTENERS	DIFFERENCE
Fruit and veg	£ 28.56	£ 21.24	34%
Technology*	£ 71.86	£ 56.67	26%
Pet food	£ 17.11	£ 14.94	15%
Clothes	£ 49.97	£ 44.40	13%
Gambling	£ 49.36	£ 43.94	12%
Home furnishings*	£ 99.17	£ 89.09	11%
Drinking out	£ 38.21	£ 35.70	7%
Gym membership	£ 40.94	£ 41.31	-1%
*recalculated from annual figure	<b>£ 395.18</b>	<b>£ 347.29</b>	<b>AVERAGE DIFFERENCE IN SPEND:</b>

15%

SOURCE: 4DC

SOURCES:  
4DC  
Ofcom



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# DISCERNING AND HIGHLY INVOLVED

## I AM "HIGHLY INVOLVED" WHEN PURCHASING...



### PODCAST LISTENERS



SOURCE: 4DC

Beyond spend power, 4DC research wanted to probe just how involved podcast listeners are in their purchasing.

Here we isolate the food category to give a flavour of just how "highly involved" listeners are in a particularly competitive, contested sector - one that's never far from the social agenda.

When we marry involvement level with purchasing behaviour, the picture of podcast listeners as the more discerning, diligent and pragmatic shoppers sharpens.

First to note is the gulf between listeners and non-listeners who say they typically buy mid-range products - this helps to explain why one group vastly outspends the other at the food hall checkout.

But the difference between listeners and non-listeners in searching for sustainable products, or in trawling through reviews, are worth highlighting.

While 23% of non-listeners say they "don't have any purchasing behaviours" (versus 6% of listeners), podcast fans are more likely to research food brands' eco-credentials, read reviews, and act on recommendations.

It's also worth pointing out the power of familiarity: more listeners than non-listeners (37% vs. 33%) say they'll buy if the brand is known.

Later in this report you'll see just how effective podcasts are in stirring brand recall, brand awareness and in facilitating sales.

So to sum up, podcasts are a gateway to an audience that is methodical and highly involved in purchasing decisions. And the medium itself is highly effective in locking brands' names into the consciousness of listeners who value familiarity.

## DESCRIBE YOUR PURCHASING BEHAVIOURS



### I WILL BUY A PRODUCT IF THE BRAND IS FAMILIAR IN SOME WAY



### I TYPICALLY BUY THE MID-RANGE PRICED PRODUCT ON THE MARKET



### I'LL OFTEN BUY PRODUCTS THAT ARE RECOMMENDED TO ME



### I WILL BUY A PRODUCT IF I KNOW THE BRAND IS SUSTAINABLE



### I'LL ONLY BUY BRANDS THAT HAVE POSITIVE REVIEWS



### I DON'T HAVE ANY PURCHASING BEHAVIOURS



SOURCE: 4DC

SOURCE: 4DC



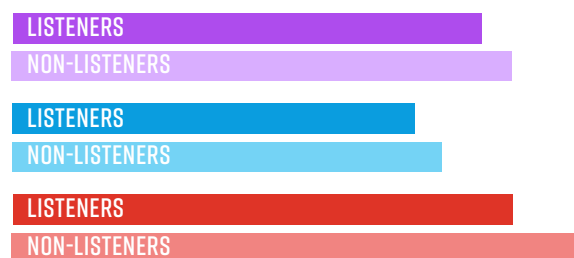
# PODCAST LISTENERS' PURCHASE POWER

## DISCERNING AND HUMAN TOO

### PURCHASING ATTITUDES

■ TOTAL ■ MALE ■ FEMALE

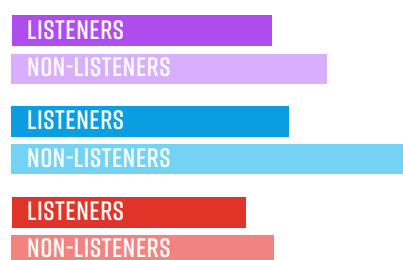
#### I LIKE VARIETY



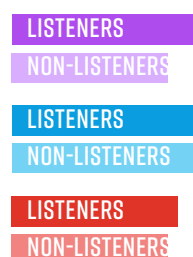
#### I LIKE TO RESEARCH



#### I LIKE TO SHOP QUICKLY



#### I'M AN IMPULSE BUYER



Picking up from the previous page, a deeper dive into people's general purchasing attitudes is revealing, especially when split by listeners and non-listeners and by gender.

37% Again, data points to podcast listeners being more diligent and thorough when it comes to researching and considering their purchases.

40% 32% 34% The most prevalent non-listener trait is "I like to shop quickly", which reiterates the previous data set knowing that this group "don't have any purchasing behaviours".

Non-listeners who like to shop quickly represent 25%, but for listeners it's 20%. Dig into the gender split here, and 31% of non listener males like to shop quickly versus only 22% of listener males.

31% 31% As you're about to find out, males represent 63% of the total UK podcast audience - and brands should see the potential in reaching a male audience that's more discerning than the norm.

Another attitude where non-listener preference outguns listener preference is variety. It's not too big of a stretch to suggest that where non-listeners like to see variety, listeners may make their decisions on the basis of research, reviews, recommendations and prior knowledge.

18% 20% Special mention should go to impulse buying. As much as we're painting a picture of podcast listeners as the more considered, rational buyers, brands wouldn't get anywhere without their beloved armies of impulse buyers.

14% 12% Listeners are human too, responding to the same emotional hooks and triggers as the audience at large.

SOURCE: 4DC





03

# MORE ABOUT PODCAST LISTENERS



# MORE ABOUT PODCAST LISTENERS

## PODCAST BITES

### GROWTH OF UK WEEKLY PODCAST LISTENERS



SOURCE: Ofcom

The wider context of UK podcasting makes for interesting reading, even if the data varies depending on source.

Ofcom says the UK podcast listener base doubled between 2013 and 2018, from 3.2m to 5.9m, or 11% of the total UK adult (15+) population. In autumn 2018, RAJAR put the figure at 6.9m adults or 13% of the adult population.

### UK PODCAST PENETRATION UNCLEAR



A 2018 Reuters survey suggests listenership could be higher still, stating that 18% of Brits access a podcast "at least once a month". To explain the disparity, Reuters claimed that BBC iPlayer and ITV streams, YouTube videos and paywalled newspaper content, which are in fact 'podcasts', are not always reported as such.

### AGE OF UK PODCAST AUDIENCE



49%



UNDER 35

SOURCE: 4DC

51%

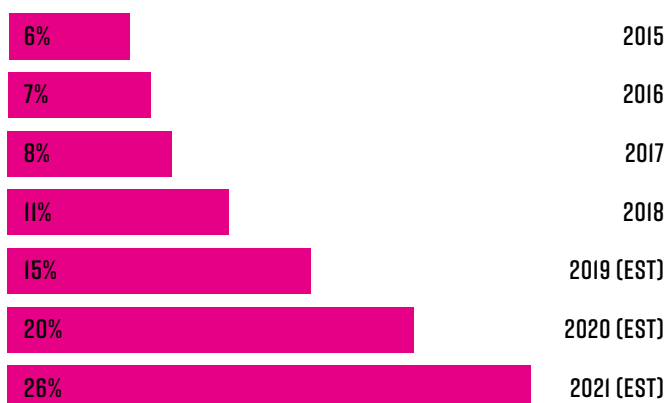


OVER 35

One thing all are clear on, however, is that podcasting is on the rise. And in the UK – as in the US – millennials and Gen Z are particularly keen. Half of all regular UK listeners are under 35 and the biggest year-on-year surge in listenership is in teens and early twenties.

Age aside, the majority of listeners do so alone, via smartphone, and the most popular listening slots are the commute or while doing housework.

### UK PODCAST MARKET GROWTH



SOURCE: 4DC, Ofcom

The gender split is interesting. Despite the cut-through of high-profile female-focused BBC content – 'Fortunately with Fi and Jane', or 'You, Me and The Big C' – the UK podcast gender split is 63% men and 37% women.

Right now, podcasts centring in sport, comedy, and news and current affairs dominate new releases and existing inventory.

Podcasting is more established with men. But in the US, a long-time male swing is now returning to centre. Should the UK follow suit, female content may be a smart long-term brand play.

SOURCES:  
4DC  
Ofcom

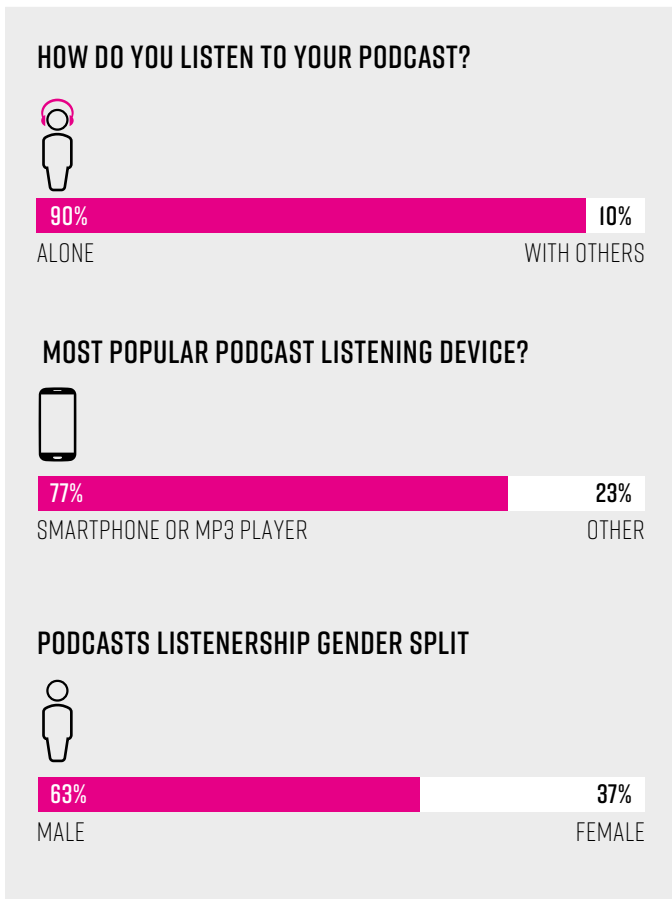


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# MORE ABOUT PODCAST LISTENERS

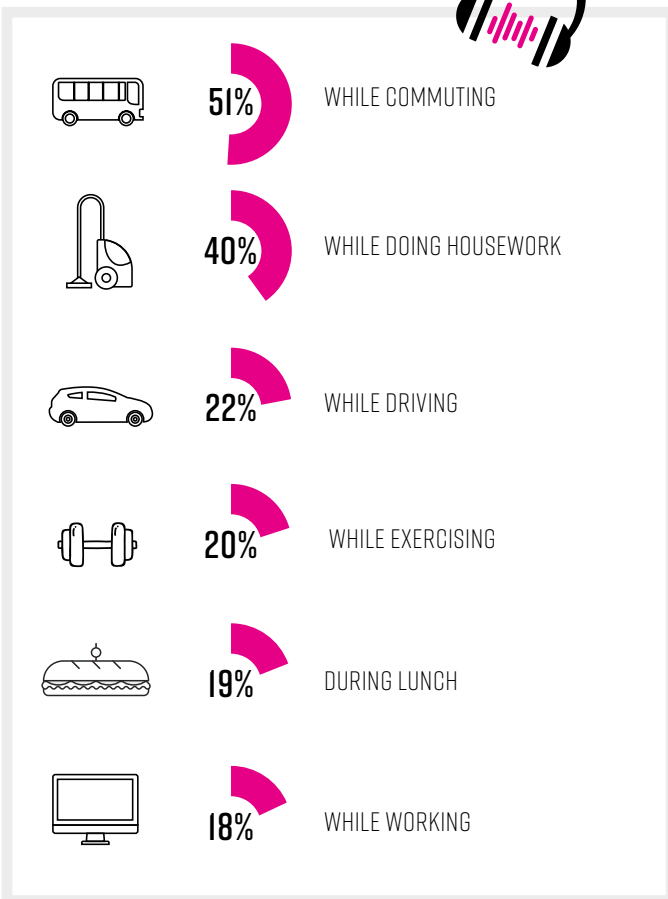
## PODCAST BITES

### PODCASTING PARTICULARS



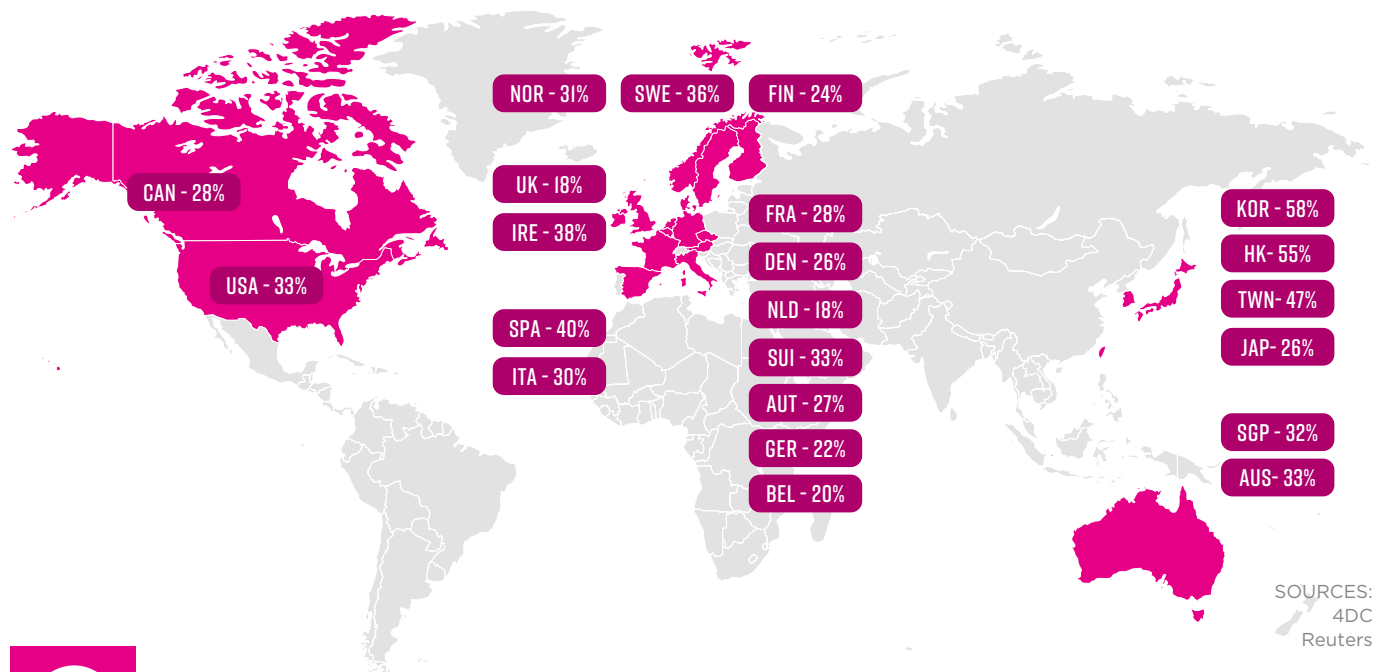
SOURCE: 4DC

### PODCAST LISTENING TIMES



### PODCAST LISTENERS IN THE LAST MONTH

#### PROPORTION OF POPULATION





# MORE ABOUT PODCAST LISTENERS

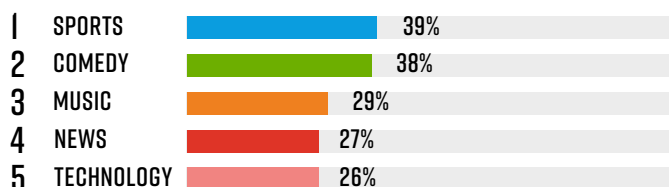
## PODCAST BITES

### THE UK'S MOST POPULAR PODCAST GENRES

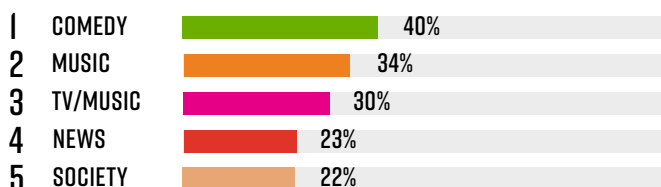
#### GENDER AND AGE SPLITS



#### MALE



#### FEMALE



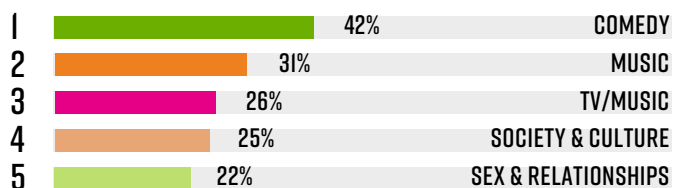
SOURCE: 4DC

### THE UK'S MOST POPULAR PODCAST GENRES SPLIT

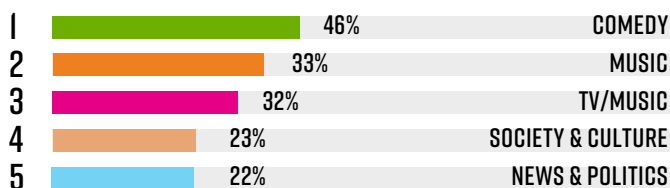
#### BY AGE GROUP



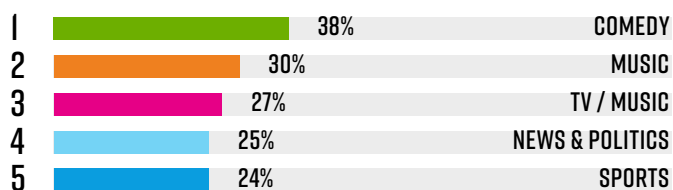
#### 16-24 YEAR OLDS



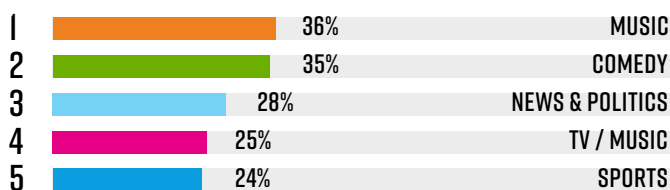
#### 25-34 YEAR OLDS



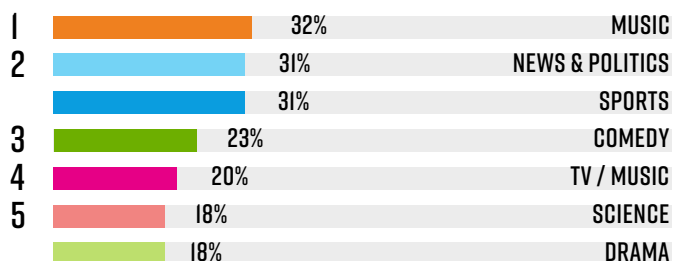
#### 35-44 YEAR OLDS



#### 45-54 YEAR OLDS



#### 55+



SOURCE: 4DC



# MORE ABOUT PODCAST LISTENERS

## A PERSONAL JOURNEY

Listening to a podcast is a solo affair, yet sourcing new material has a real community feel to it; a similar dynamic to friends sharing books.

Our research shows that listeners either put in hard graft to find new titles or they rely on word-of-mouth buzz, or recommendations from like-minded friends or trusted contacts.

Podcasting feels like a journey of discovery. Few listeners simply stumble upon their next show.

What's seen as unimportant in a podcast is more interesting than what's seen as important.

Nearly a quarter of respondents say they don't care who the presenter is. Over a quarter say reviews are unimportant, and nearly one in five believe ratings don't matter.

It's also unimportant to have a trusted brand involved, which hints at the delicate balance brands and advertisers need to strike if they're to effectively court this unique audience.

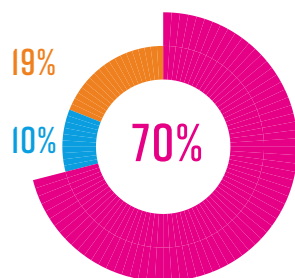
### HOW DO YOU FIND NEW PODCASTS?



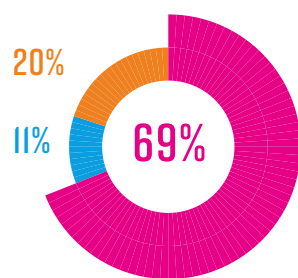
### WHAT'S IMPORTANT IN CHOOSING A PODCAST?



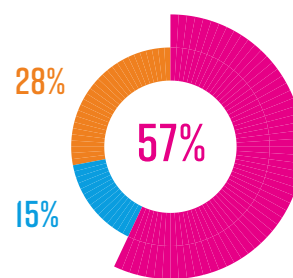
■ IMPORTANT ■ NEUTRAL ■ NOT IMPORTANT



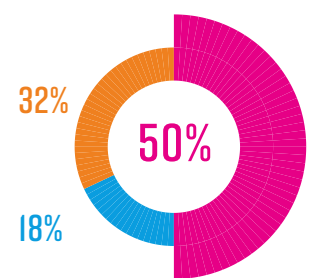
THE DESCRIPTION OF THE PODCAST IS ENGAGING



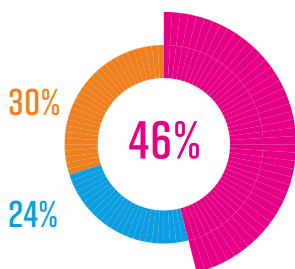
QUALITY OF THE AUDIOGRAM / SOUNDBITE



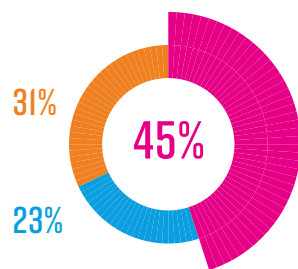
PROFESSIONAL PODCAST REPRESENTATION



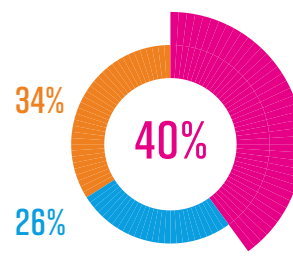
THE PODCAST RATING



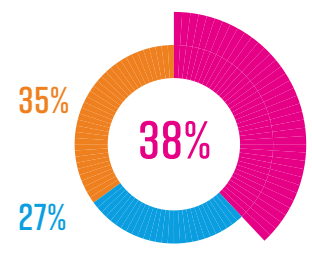
THE QUALITY OF THE IMAGES / VISUALS THAT SUPPORT THE PODCAST



IF I HAVE HEARD OF THE PODCAST PRESENTER



IF THE PODCAST IS CONNECTED TO A BRAND I TRUST



THE NUMBER OF PEOPLE WHO HAVE REVIEWED THE PODCAST

SOURCE: 4DC

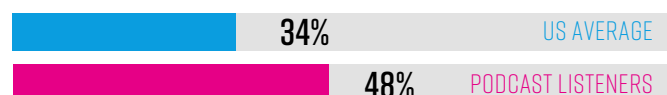
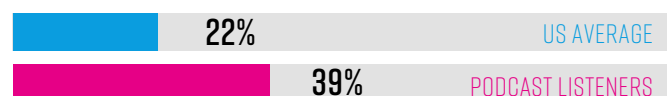
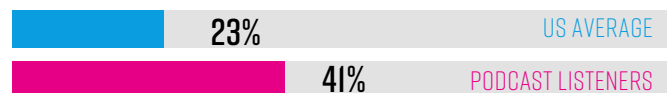


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The Podcast Strategists  
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# MORE ABOUT PODCAST LISTENERS

## PODCASTING AND OTHER MEDIA

### SOCIAL MEDIA USE COMPARISON



SOURCE: Nielsen



Because 90% of UK podcast listeners say they take in a podcast alone it might feel like the audience is comprised of quiet, detached, disconnected types.

But as we read previously, there's a lot more connectedness and community here than meets the eye.

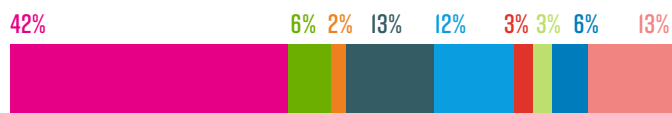
US podcast fans are more active on social media than the national average. All in, listeners are 23% more likely to use social media "several times per day" than non-listeners.

The UK has yet to definitively correlate podcast and social media trends (stay tuned for future 4DC reports) so for now, we can look to podcast listeners' activity on other audio platforms as an indicator of their general connectivity.

### UK PODCAST LISTENERS MORE AUDIO ACTIVE



#### WEEKLY PODCAST LISTENERS



#### GENERAL UK POPULATION



- LIVE RADIO ON A RADIO SET
- LIVE RADIO ON A LAPTOP / TABLET / MOBILE
- ON DEMAND RADIO PROGRAMMES
- STREAMED ONLINE MUSIC
- OWN PERSONAL DIGITAL MUSIC / AUDIO COLLECTION
- MUSIC VIDEO CHANNELS / SITES FOR BACKGROUND
- OWN PERSONAL COLLECTION (CD / VINYL)
- RADIO PODCAST DOWNLOAD
- OTHER PODCAST DOWNLOAD

SOURCE: RAJAR

And with that, we can already see a keen, engaged, super-active, digital group.

More than tapping into an audience of social butterflies, podcasts have long shown their ability to galvanise audiences and create communities. Fans regularly engage with the material, each other and even the host through social media.

In the US, male sexual performance aid Blue Chew, for example, has taken on a life of its own across social media - and in sports locker rooms - owing to hilarious host reads on several pro wrestling podcasts.

During 'Serial', amateur sleuths on reddit and other message boards surfaced new evidence that host Sarah Koenig used as part of her narrative. In fact, fan-found evidence was even used by the real life protagonist's lawyer in court.

SOURCES:

Ofcom.org

RAJAR - Midas Audio Survey 2018

Nielsen - Total Audience Report 2018

Edison - The Podcast Consumer 2019



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04

# SPECIAL RELATIONSHIPS



PETER MITCHELL, 4DC

# SPECIAL RELATIONSHIPS



**PETER MITCHELL**  
CO-FOUNDER - 4DC

It's almost a cliché to hype the significance of true crime podcast, 'Serial'. But when veteran US broadcaster Judy Woodruff called the show "an unexpected phenomenon", she probably didn't realise her words more accurately applied to the entire genre of podcasting.

Simple and low-fi, in many ways podcasting shouldn't be part of the conversation in a world of AI, AR, VR, big data and next-gen video. But the rise shouldn't surprise anyone. In fact, the medium of audio more generally is on a major upswing with UK radio revenue hitting a record £700m in 2018.

In a world of fleeting connections, podcasts inspire a closeness between listener, producer and each other that has long evaded other formats. As a solo, one-to-one affair, time and again, listeners invite hosts to join them on the journey of life, especially the boring bits.

Brands and content producers have tried to capture this dynamic for generations so it's ironic a much humbler medium is succeeding.

Perhaps podcasting's draw is in the collaboration. With a lack of visuals, every broadcast is unique as listeners use their own imaginations to enhance the narrative.

In many ways podcasting is rebellious, too. It's now the norm to fill down-time with social media and WhatsApp chats, YouTube, Netflix and TV. But as life gets relentlessly more visual and noisy, podcasts offer relief for eyes and brains.

# 93%

OF PEOPLE WHO START A PODCAST FINISH IT

Podcasting is quiet-time for the digital era. Listeners are not opting out from the relentless consumption of information, but the manner by which they consume it. Some 74% of podcast listeners say they tune in to learn new things, 71% say they want to be entertained, and 60% listen to stay up to date with events.

So whether a listener has 10 minutes or two hours to spare, they can do all those things in a more sedate, less aggressive format.

Brands armed with data that explains not only who they're talking to, but where listeners are, when and why can carve out extra special relationships by leveraging the unique patterns and expectations of podcast fans.

In this report we describe the podcast audience as special and different. But the market has yet to assign appropriate value models to recognise this uniqueness.

Currently, CPMs in the UK are higher than the US because the latter is a more competitive market.

- **LIVE READS - £25 - £35**
- **SPOT ADS - £8 - £15\***

Yet CPM for live reads in the UK has doubled in the last year. And we anticipate more. The podcast advertising model sorely needs to evolve to accurately represent the true richness and value of this A-Listener audience.

\*CPMs thanks to Audioboom

SOURCES:  
Ofcom.org

RAJAR Midas Audio Survey 2018  
Reuters Institute Digital News Report 2018  
Edison - The Podcast Consumer 2019



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## SPECIAL RELATIONSHIPS

# PODCAST VS. VIDEO

Video has long been touted as the active channel in a world of passivity. A user's click on a video is said to distinguish the engaged from the lay viewer; the digital equivalent of reading a billboard instead of mindlessly glancing.

We're in an era where mobile outearns desktop, and video is largely responsible for the 15% hike in the UK's digital advertising spend. Two in three marketers now believe in making bespoke video for each active advertising platform.

When done well, video equals big views and big numbers. Those equal power in the dotcom era.

Stacking up podcast plays versus video won't convince brands. However, to see podcasting's success in sheer numbers is to miss the point. This is a medium that's all about engagement.

In late 2017, Apple, Spotify and Stitcher began to push engagement performance metrics as a truer measurement of podcast power. Following that move, a WIRED editorial in early 2018 – entitled 'Podcast listeners really are the holy grail advertisers hoped they'd be' – quickly doubled down on the medium as engagement gold dust.

Unlike video, the digital audience isn't served 40 podcasts per-channel-per-day: listeners have to actively look for podcast content before tapping play, adding an extra dimension of buy-in even before the narrative begins.

The average length of a US podcast (generally speaking – when divided by genre it varies wildly), is 43 minutes and 24 seconds. So with podcasting, listeners not only know what they're getting themselves into – they actively seek it out.

In fact, in 2018 the length of iTunes' most popular 400 shows (US) was 10 minutes longer – 53 minutes and 4 seconds. Consider that videos haemorrhage viewers every minute after a two-minute sweet spot.

Take Edison's 93% completion figure, subtract distractions and then factor in longevity: podcast listeners can't be called anything but a captive audience. If they're strategic and follow a few canny rules, brands can do a lot more across 20 minutes of podcast than two minutes of video. Just imagine how many people will read a 20, or even a 53 minute article.

### LENGTHS OF PODCAST EPISODES



**38 MINUTES AND 42 SECONDS**  
MEDIAN PODCAST LENGTH



**43 MINUTES AND 24 SECONDS**  
AVERAGE PODCAST LENGTH

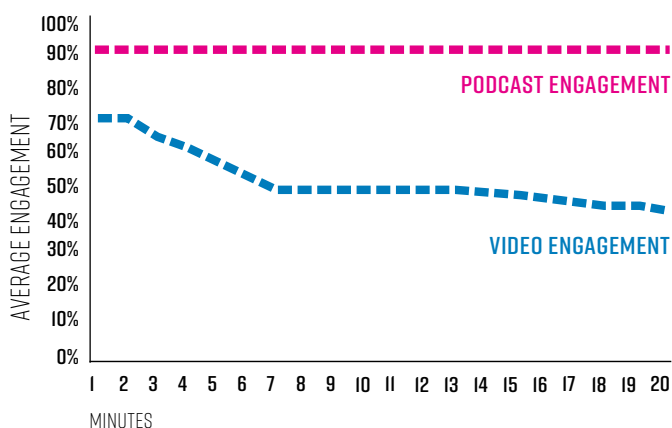


**53 MINUTES AND 4 SECONDS**  
AVERAGE LENGTH OF ITUNES TOP 400 PODCAST

SOURCE: Pacific Content



### US PODCAST AND VIDEO ENGAGEMENT



SOURCES:

IAB

Pacific Content

WIRED

Edison - The Podcast Consumer 2019

Edison - Infinite Dial 2019

Wistia



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# PODCASTING'S EFFECTIVENESS

4DC research, conducted alongside Audioboom, sought to determine podcast advertising's effectiveness using a UK sample audience. A representative panel of listeners were played two 20 minute podcasts, leading F1 show, 'Beyond The Grid', as well as 'No Such Thing As A Fish', a fact-based show that independently spun out of popular BBC show 'QI'.

Each podcast included host-read adverts. And on completion the sample audience was tested around brand recall, and brand perception. Secondly came the audience's perceived effectiveness of podcast advertising versus TV, radio, billboard, online and print. The numbers are pretty resounding. In terms of brand recall, Following the 20 minute F1 podcast, over two thirds of listeners (67%) correctly recalled the advertising brand was Bose, despite the spot appearing at the very beginning of the broadcast.

Recall for The Economist in 'No Such Thing As A Fish' was slightly less (60%) but still three in five - and still a huge majority.

## HOST-READ ADVERT EFFECTIVENESS



BOSE (TOTAL) ■ ACURATE ■ INACURATE ■ NOT SURE

TRUST WORTHY BRAND



LEADING PRODUCER OF ELECTRONIC PRODUCTS



PROVIDES PRODUCTS FOR PEOPLE LIKE ME



HIGH QUALITY PRODUCTS



THE ECONOMIST (TOTAL)

TRUST WORTHY BRAND



LEADING WEEKLY NEWSPAPER



PROVIDES A SERVICE FOR PEOPLE LIKE ME



CARES ABOUT ITS READERS



SOURCE: 4DC

## PODCASTING MORE EFFECTIVE THAN ...



AGE GROUP 25-34 ■ YES ■ NO ■ NEUTRAL

TV



RADIO



PRINT



ONLINE



TOTAL

TV



RADIO



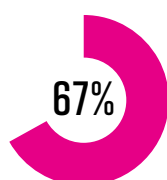
PRINT



ONLINE



## BOSE BRAND RECALL



## ECONOMIST BRAND RECALL



SOURCES:  
4DC/ Audioboom



# PODCASTING'S EFFECTIVENESS

The previous page shows the potential for brand recall and engagement, as well as podcast advertising's perceived effectiveness. This page probes the real-world rates of listener follow-up.

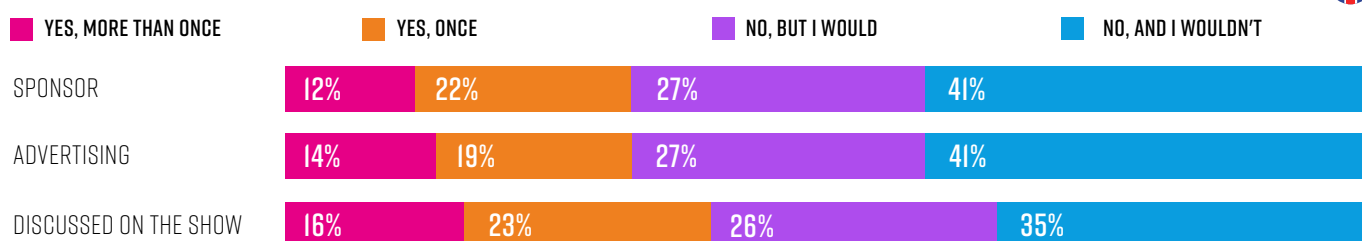
In all cases, and across all forms of advertising, those who say they wouldn't follow-up after hearing a brand message are always in the minority versus those who already have or would in future.

The highest rates of "Yes, once", and "Yes more than once" occur when brands are "discussed on the show". The highest "No, but I would" is reserved for sponsor brands.

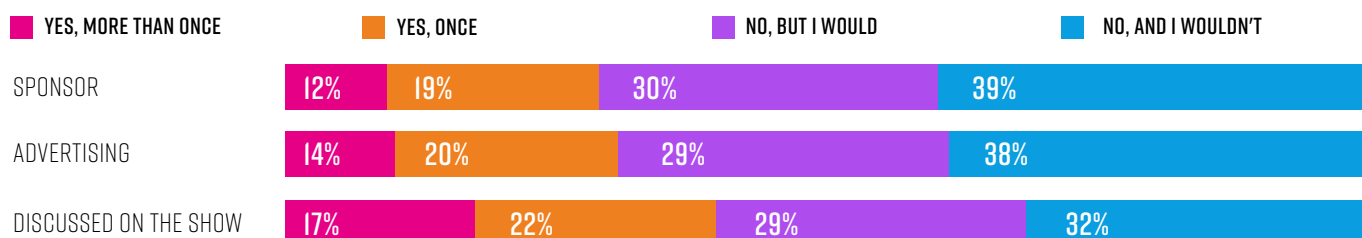
Throughout this report, great emphasis has been placed on brands treating the unique environment of the podcast - including the material and the audience - with respect.

This data doubles down on that necessity.

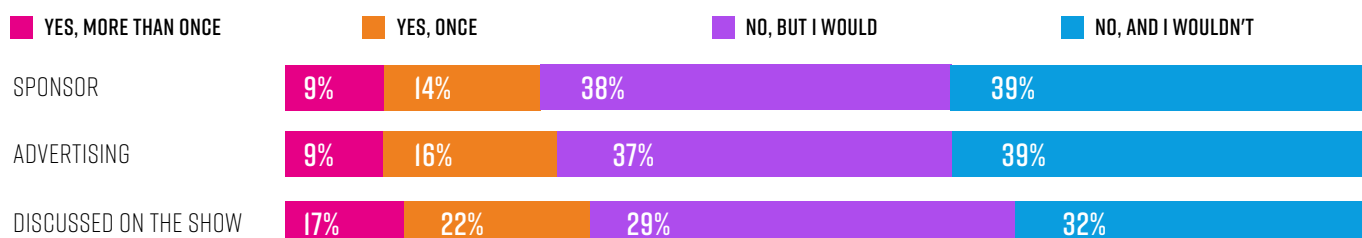
## NOTED DOWN A BRAND TO LEARN MORE ABOUT IT AFTER HEARING ABOUT IT ON A PODCAST?



## FOLLOWED UP/RESEARCHED A BRAND AFTER HEARING ABOUT IT ON A PODCAST?



## PURCHASED A PRODUCT FROM A BRAND AFTER HEARING ABOUT IT ON A PODCAST?



## WHEN DID YOU FOLLOW UP/RESEARCH THE BRAND AFTER HEARING ABOUT IT ON THE PODCAST?



SOURCE: 4DC

NOTE: some graphs may not equal 100% owing to rounding and or respondents ticking more than one answer.



## SPECIAL RELATIONSHIPS

# POWER PODCASTS

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**THE BEST PODCASTS ARE NOT VIEWED BY THEIR BRANDS AS CONTENT ADD-ONS BUT AS MAJOR CAMPAIGNS IN THEIR OWN RIGHT, WITH SUBSTANTIAL CREATIVE, SOCIAL AND FINANCIAL INVESTMENT UNDERNEATH.**

---



When a consumer podcast pops, it tends to follow the same trajectory that popular radio shows, TV formats and breakout personalities have in the past. A standout example in the UK would be 'My Dad Wrote a Porno', which has completed four seasons, signed book and major TV deals and is even now a stage show. Social media followers are in the hundreds of thousands.

But for every MDWAP, or 'Serial', hundreds of thousands fail to move the needle. An estimated 2,000 new podcasts break every week. And given the fragmentation of genres and listener motivations, it's a competitive sport.

Like non-branded shows, branded podcast content needs to be more than great content. It needs strategy, marketing nous, budget and a real understanding of why listeners tune in. It also needs patience - shows rarely pop immediately.

Furthermore, it requires shrewd analysis of engagement metrics to understand listener drop-off points, and to build on the pieces of show that resonate. No-one's pretending it's easy.

Popular branded podcasts are not 30-minute advertorials or relentless sales pitches. Instead brands employ whatever equity, access, nostalgia or information they can exploit to turn narrative or insight into uniquely engaging content that satisfies a relatively small audience in that unique podcasting environment.

It's worth noting that, as listeners expect, the best podcasts are not viewed by their brands as content add-ons but as fairly major campaigns in their own right; with substantial creative, social and financial investment underneath.



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**AN ESTIMATED 2,000 NEW PODCASTS  
BREAK EVERY WEEK**

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## SPECIAL RELATIONSHIPS

# POWER PODCASTS



The year 2017 was probably the breakout in big brand podcasting, as the likes of Microsoft, Virgin Atlantic, eBay, Tinder, Slack, Spotify and more jumped in.

To call out a few, fresh ingredients firm Blue Apron used its 'Why We Eat What We Eat' podcast to explore the anthropology of certain food habits: where they started and why humans adopted them. It's a neat way to piggyback onto the hot-button issue of healthy eating and all the social media capital within.



GE's 'The Message' is about exploring and decoding extra-terrestrial activity. It's a little more blatantly about product, but so entertaining that listeners don't mind GE tech being central to the plot.



Microsoft's 'Future' podcast explores things to come in technology, health, data, and even gaming. The show is an extension of a brand territory that Microsoft has spent a lifetime carving out, and talks of futures the company will no doubt be instrumental in shaping.

Lastly, machinery and equipment pioneer John Deere has taken a different path - that of cause ownership. The firm's 'On Life and Land' podcast covered depression and mental illness across two series, highlighting among other things the fact that farmers' suicide rates far exceed that of military veterans.

The John Deere podcast, which initially reached circa 5,000 downloads, may sound like a strange brand vehicle but two key things stand out. One, given the subject matter, budget could easily have been drawn from the CSR account.



And two, think about the natural audience of a firm that builds and sells tractors, add sensitivity and customers care to the conversation and suddenly a whole new dimension of brand is reaching and even helping a pinpoint listenership. In other words, they used podcasting to boost brand equity and veer in a more compassionate direction.

SOURCES:  
Ad Age  
Fastcompany







05

# THE FUTURE OF PODCASTING



# THE FUTURE OF PODCASTING

## ALEXA! PLAY A PODCAST

### 2019 AVERAGE UK FAMILY - TWO ADULTS, TWO KIDS, FOUR SMART SPEAKERS!

According to Deloitte, the UK smart speaker market will be worth £5.6bn in 2019 - that's 164m units at an average selling price of £34.10. In other words, it'll grow by two-thirds versus 2018's 98m units sold. In fact, the UK will be the world's third largest smart speaker market by the end of the year, after the US and China.

If Deloitte's figures are accurate, 262m smart speakers will have been bought and installed in the last two years alone. With 66m (2017 figure) people in the UK, then by the end of the year there could be four smart speakers for every citizen. To put it another way, the typical UK family in 2019 has two parents, two kids, and almost definitely a smart speaker.

Sure, a huge number - perhaps a majority - of smart speakers are bought in order to sit in professional environments. Employers are continuing to explore the workplace benefits and the potential of the technology.

But if the average person regularly comes into contact with up to four units, made-for-smart-speaker content will soon be a staple of life.

Of course, we're not there yet. Despite the big numbers, UK podcast listenership and smart speakers, at present, barely overlap. According to RAJAR, just 3% of UK listeners tune into podcasts on a smart speaker today.

Business Insider intelligence suggests that smart speakers' limited impact is down to trust, or rather a lack of it. But from TV to the internet, most new platforms encountered trust issues

upon launch, and the smart money says smart speakers will soon be an audio force in their own right.

At the moment, the vast majority of people use their speakers as a glorified jukebox. But that's mainly because outside of playing music, killer smart speakers apps simply don't exist.

But they're coming. They have to.

If producers and brands are prepared to exploit or shape the role smart speakers will come to play in our lives, then podcasting could be one of a number of media that'll soon change its very foundations.

Because more than three quarters (76%) of household smart speakers are said to sit in communal spaces, like the living room or kitchen, brands and content producers need to think about where, when and why people use them. And how podcast content can slide into those routines for one listener, and for groups of listeners.

Several newspapers, including the Economist and New York Times offer briefing broadcasts that are now a morning staple for many listeners. Similarly, mindfulness and spirituality podcasts are a popular way to close out the day.

So from cooking show audio for Friday night in the kitchen, to Sunday games night in the living room, smart speaker penetration could turn podcasting on its head; from a solo endeavour into a team sport.

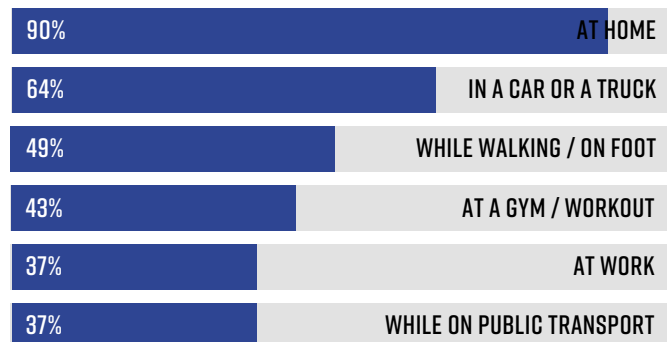
SOURCES:  
Business Insider  
RAJAR  
emarketer.com  
Voicebot.ai  
Deloitte



# THE FUTURE OF PODCASTING

## DRIVING UP NUMBERS

### POPULAR PODCAST PLACES (US)

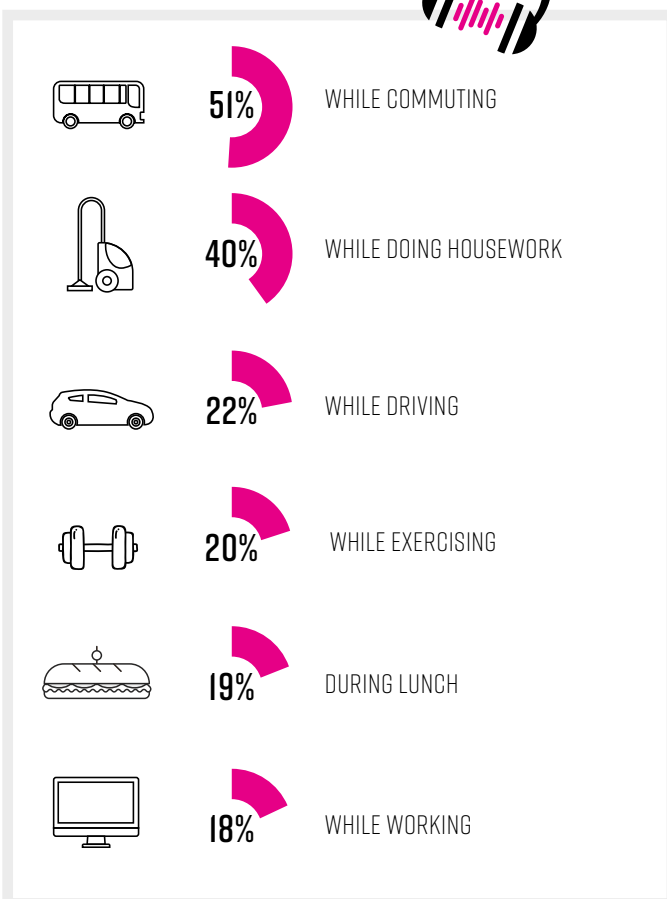


SOURCE: Edison

If we take the US as a blueprint for the evolution of podcasting that the UK might follow, we'd expect in-car listening to spike significantly. At present, just 22% of UK listeners say they regularly do so while driving, but in the US it's 64% - nearly three times more.

A caveat, the 22% 'while driving' answer comes from proprietary 4DC research. The 2018 RAJAR Midas paper merged 'in-car' listening with 'while travelling' listening to produce 35%. Here, 4DC research makes a pivotal separation.

### PODCAST LISTENING TIMES



SOURCE: 4DC

As established in the previous section, the looming dominance of smart speakers will disrupt not just what podcast content will be but also the very format and dynamics of the genre. We may soon see a solo become a team sport as podcasting adapts to its surroundings.

The catchphrase of Eric Bischoff, host of pro-wrestling show '83 Weeks' (reportedly the world's most profitable podcast in late 2018), is 'Context is King'. When considering the role of the car or the smart speaker, that goes double for podcast listening.

Like in-home, UK brands can see in-car podcast listening - and its pending spike - as an opportunity to tailor unique content to fit the environment and particulars of driving.

Brands that produce hyper-appropriate content for motorists could get ahead of the curve before the trend takes hold and we accelerate quickly towards saturation.

SOURCES:  
Statista  
Pacific Content



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# THE FUTURE OF PODCASTING

## CONSOLIDATION

If brands want to get a handle on the popularity of, say, a video publisher, it's fairly easy. The dominance of one major platform - in this case YouTube - means subscriber numbers and views are evident to anyone who looks.

Podcasting, however, is seriously fragmented. Hosts commonly run through a laundry list of the various places users can access the next episode. There's a lot of platforms out there.

For producers, workarounds do exist to ensure everyone - no matter their chosen device or platform - can access content. But it's clunky and each additional click causes user dropoff. This is a major reason why device-agnostic platforms have more market share now than Apple and Google.

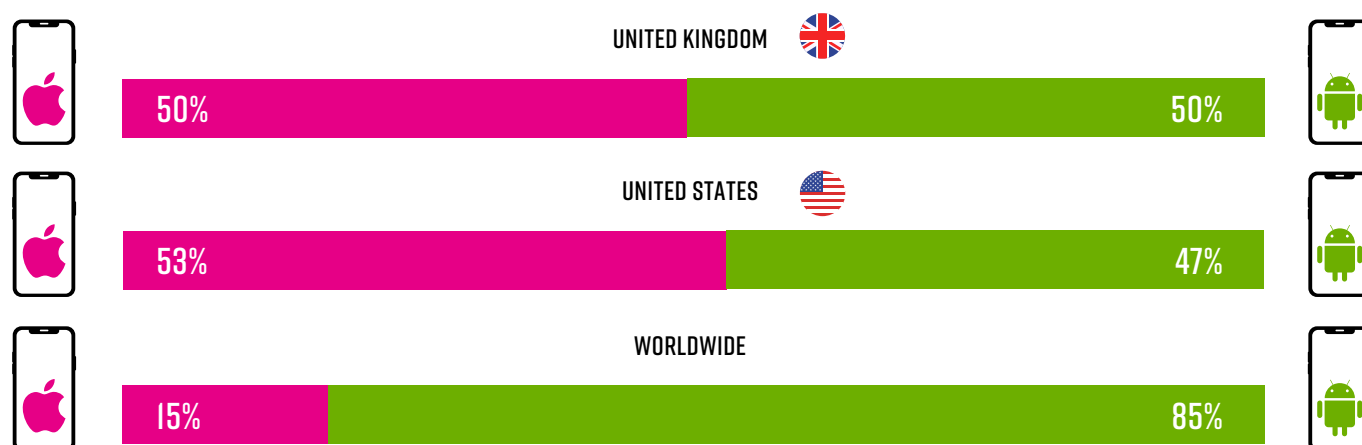
The vast majority of podcasts plays are on smartphone. But Apple's restrictive ecosystem - which has of course aided the company's gargantuan growth - is exclusive. In a democratic and competitive movement, excluding half the audience isn't conducive to monopoly.

Android, or rather Google, faces a similar problem but has a more comprehensive solution. A year ago, Android devices were said to listen to ten times fewer podcasts than iOS devices. A chief reason was the fragmented audio app landscape on Android.

The Google Podcasts app, which launched in June 2018, was the search giant's move to rectify that. More recently, as part of its mission to make podcasting a "first class citizen", Google is leaning on its dominance in browsing to grab podcast share for users on any device.

Google's in-browser podcast player enables play, pause and skip features on any device, as well as ensuring audio still runs when the device is sleeping. In-browser podcast play is a neat trick for several reasons: to spread the word on podcasting, improve algorithms to shore up paid-for targeting, and to lay the groundwork for voice search and smart speakers.

### SMARTPHONE DIVIDE



SOURCE: Statista

SOURCES:  
Statista  
Pacific Content



# CONSOLIDATION, PRODUCTION AND DISTRIBUTION

### RECENT SPOTIFY ACQUISITIONS

GIMLET	\$200M
ANCHOR	\$140M
PARCAST	\$100M

Away from Apple and Google, the most active player in the business of podcasting has been Spotify, paying a reported \$340m to gobble up Gimlet, a content creation house, and Anchor, a content platform with several advertising and monetisation features.

In Q1, 2019, Spotify completed a trio of investments when it paid a further \$100m for Parcast, a boutique podcast studio with several big-rated titles to its name.

“

**BASED ON RADIO INDUSTRY DATA, IT IS A SAFE ASSUMPTION THAT, OVER TIME, MORE THAN 20% OF ALL SPOTIFY LISTENING WILL BE NON-MUSIC CONTENT.**

*DANIEL EK - SPOTIFY CEO*

Why is this relevant? Well, several reasons.

First of all, Spotify is platform-agnostic, so doesn't share Apple's and, to a lesser extent, Google's worries.

Secondly, Spotify's itching to replicate the Netflix model of producing its own original content because continually paying royalties to record labels hurts the bottom line. Spotify has a vision of a two sided marketplace where content creation and distribution can work as one. This will be super interesting to watch.

Thirdly, and unlike Netflix, Spotify is freely available to anyone on any device so the potential market share is near absolute. Premium users will still hear ad reads and spots, but more than half the audience - which currently doesn't pay for Spotify - will be served targeted, programmatic ads on top. That spells profit.



SOURCES:  
Tech Crunch



# THE FUTURE OF PODCASTING

## THE POWER OF THE BBC

### US PODCAST SERVICE PROVIDER BATTLE



The fight for US listeners is currently a two horse race. Pandora, which was recently acquired by SiriusXM, has circa 30% audience share and Spotify a 24% share. For licensing reasons there's no Pandora in the UK, but the country does have another mighty player - the BBC.

Ofcom research shows that UK listeners access podcasts from a range of sources but the go-to publisher in the UK - for more than one in three listeners - is the BBC.

Recognising the power of podcasts, the BBC is transitioning away from iPlayer Radio towards its more podcast-friendly Sounds app.

Sounds is custom designed to fit podcast consumption patterns: smartphone downloading, personalised listening recommendations and the tastes of younger listeners who eschew traditional radio.

Given the advertising, presence, and media power of the BBC machine, it's unsurprising the corporation's podcast offering has taken a quick, firm grip - and listeners are turning to a trusted, easy source for audio content.

The nature of the BBC - in the UK anyway - means brand advertising won't feature within domestic Sounds content. But it'll be interesting to watch the broadcaster's strategy in international market develop - advertising abroad is big business.

# 33% +

## PODCAST LISTENERS IN THE UK CHOOSE BBC AS THE GO-TO PODCAST PUBLISHER

SOURCES:  
Pacific Content  
Guardian





# THE FUTURE OF PODCASTING

## STANDARDISING METRICS



We earlier established how important engagement is to podcasting. And it has more or less become a central metric to point at a podcast's success.

Another measurable that's yet to get the attention it deserves is subscribers, which matters to podcast advertisers because it points at the potential base for future growth.

Currently, podcast subscribers are hard to measure because the listening app landscape is fragmented and podcast hosting is scattered.

There is no single source of truth for "subscribers", and different methodologies are used to define what exactly a subscriber is and how, if at all, they should be counted or alerted to new content.

Spotify, for example, calls them "followers".

Whatever the terminology, when a person hits subscribe they're making it clear they want to hear more - they're in it for the long haul and, in the very near future, they could be bankable customers or brand advocates.

SOURCES:  
Statista  
Pacific Content



# THE FUTURE OF PODCASTING

## OUTRO

Thank you for reading our debut podcasting report. Currently underserved by data, we have gone some way to showing the UK market for what it is: fruitful, viable and simmering with potential.

There's a seismic opportunity for UK brands to get significant purchase - and extract huge value - using an underappreciated format. The market shows all the hallmarks of success a brand leader could hope for.

By reaching demographics who show such a pronounced appetite for podcasts, and who show considerably more cash, connectivity, consideration, community and engagement than the public-at-large, brands have an open goal to reach the kinds of audiences they need to strike a chord with.

But the early-bird opportunity won't last long. The future is looming. Once the UK scene realises and executes on podcasting's true value - not the legacy metrics of old - we'll soon see a shift.

Podcasting is a format that could easily supersede the UK's premier brand vehicles - it's destined, and deserves, to go mainstream.

---

**WE HOPE YOU ENJOYED GETTING TO KNOW THE A-LIST(EN)ERS  
- WE LOOK FORWARD TO NEXT TIME**

---



# PODCAST GLOSSARY

## BACK CATALOG

Previously recorded podcast episodes

## CPM RATE

Cost per mille (CPM) Cost per thousand listens/U-FR's. In podcasts it's the average CPM rate according to sources is approximately £20-£35. Some popular and well produced shows are seeing CPM's up to £100.

## EVERGREEN CONTENT

Content that is sustainable and lasting, remains relevant over time.

## INSERTION ORDER

An insertion order is the final step in the ad proposal process. When signed, it acts as a commitment that the advertiser will run a campaign or ad spot on the podcasters podcast. Our platform automatically takes care of this for you.

## LIVE READ AD

Podcast host reads your ad live during his/her show. In most cases your ad will be permanently recorded.

## MID-ROLL AD

The ad gets mentioned during the middle of the podcast.

## NATIVE ADVERTISING

Type of advertising , usually online but feasibly elsewhere, that matches the form and function of the platform upon which it appears which in our case is podcasts.

## POST-ROLL AD

The ad gets mentioned near the end of the podcast.

## PRE-ROLL AD

The ad gets mentioned at the beginning of a podcast.

## PROGRAMMATIC ADVERTISING OR DYNAMIC AD INSERTION TECHNOLOGY

Programmatic advertising typically refers to the use of software to purchase and insert ads in a particular medium, as opposed to the traditional process that involves human negotiations and manual insertion orders. It's using an ad server to buy and insert ads.

## RSS FEED

An individual link you'll get from your media host when you sign up with them. This is where you'll upload your podcast episodes so that you can submit your podcast to various directories easily.




## UFR

Unique file requests, essentially what we call a listen.

TO CREATE THIS REPORT, 4DC COMMISSIONED PROPRIETARY RESEARCH. THE RESEARCH WAS CONDUCTED BY OPINION MATTERS, WITH 3,126 RESPONDENTS (1,112 NON-PODCAST LISTENERS AND 2,014 PODCAST LISTENERS) AGED 16+ IN GB BETWEEN 08.03.2019 - 13.03.2019. THE SURVEY WAS CONDUCTED FROM A RANDOM SAMPLE OF UK ADULTS. OPINION MATTERS ABIDE BY AND EMPLOY MEMBERS OF THE MARKET RESEARCH SOCIETY WHICH IS BASED ON THE ESOMAR PRINCIPLES.



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# ADDITIONAL SOURCES

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## THE PODCAST STRATEGISTS

