

A Fresh Take

▶ Staying ahead of evolving dynamics in the marketplace and our culture

How Audio Podcasts Complement Video Viewing



Audio podcasts have become more popular over the last few years as consumers seek out more entertainment and informational content.

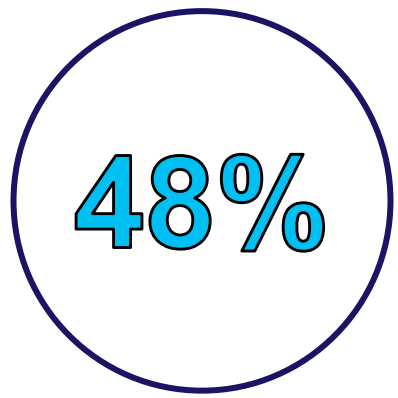
By understanding how and when people are engaging with audio podcasts, marketers can leverage the platform for incremental opportunities to engage consumers during traditionally 'non-video viewing' occasions.



People increased their usage of video and audio platforms during COVID, especially watching TV shows online



% of respondents who have viewed / listened to more of the following content during the pandemic



TV Shows Online



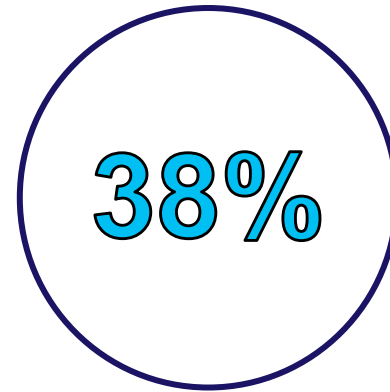
Podcasts

Source: VAB analysis of Magna & Spotify, *Digital Audio Expansiveness: Growing Landscape & Opportunities*, 2020. Data based on February 2021 online survey of people who have listened to digital audio or watched digital video in the past 24 hours, n= 2,505 (Gen pop: n=2,206, booster of Spotify users: n=300). Q: How has your time spent listening or watching the following types of media changed, if at all, during this COVID-19 pandemic?

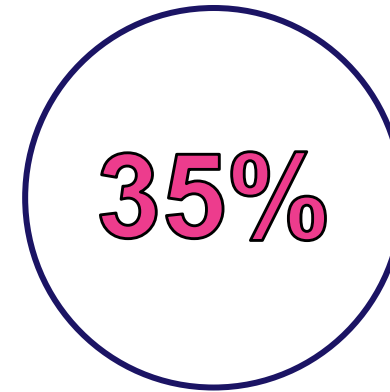


Overall video and audio consumption is expected to increase even more going forward

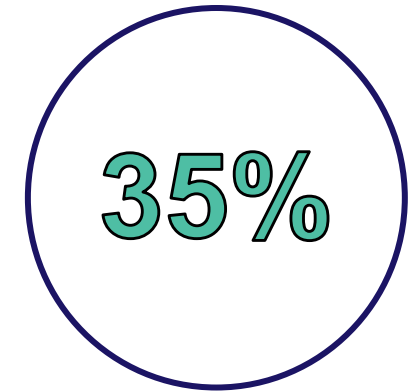
% who expect to *increase* their consumption of the following content through 2021



Free Streaming / AVOD*



Live TV



Podcasts

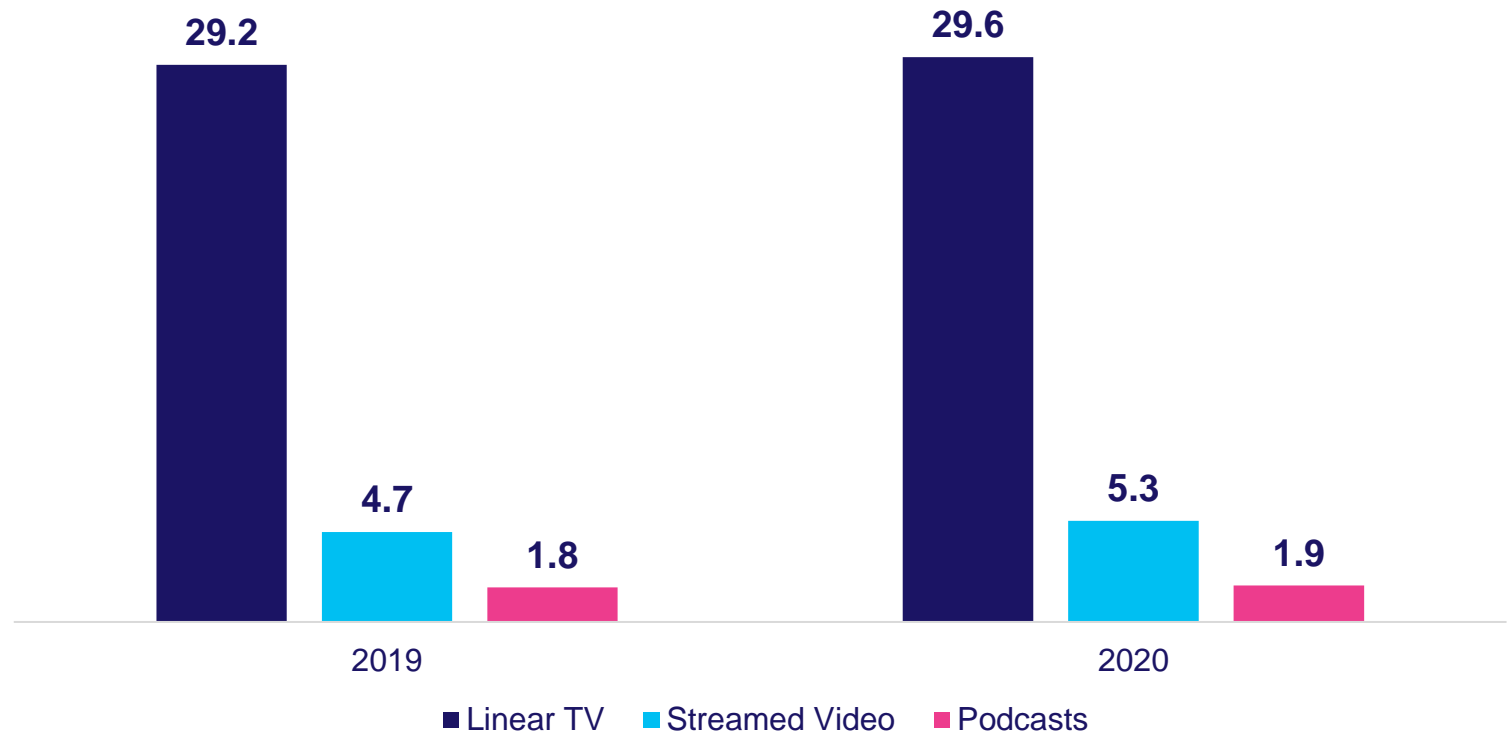
Source: VAB analysis of Magna & Spotify, *Digital Audio Expansiveness: Growing Landscape & Opportunities*, 2020. Data based on February 2021 online survey of people who have listened to digital audio or watched digital video in the past 24 hours, n= 2,505 (Gen pop: n=2,206, booster of Spotify users: n=300). Q: In what ways has the role of audio in your life changed due to the COVID-19 pandemic? Respondents who answered, 'I'm looking forward to it more'. Tremor Video & Unruly, *The NEW New Normal: How Consumer Behaviors Are Likely to Change in the Months Ahead*, April 2021. Data based on March 2021 survey of 893 U.S. consumers, conducted in partnership with Unruly. Q: Over the next 6 months, compared to now, how much time do you expect to spend watching TV in the following ways? *AVOD = 'ad-supported video-on-demand'.



However, while growing, podcast listening remains a fraction of the time spent with video among users of each medium



Weekly Hours Spent Watching / Listening to....
2019 vs. 2020



Source: Linear TV - VAB analysis of Nielsen R&F Time Period Report, Live+7, Total Day, P18+, viewing source: ad-supported cable TV & broadcast TV, time period: w/o 12/2/19 vs. w/o 12/7/20. Streamed Video & Podcasts - YouGov Profiles, December 2020.

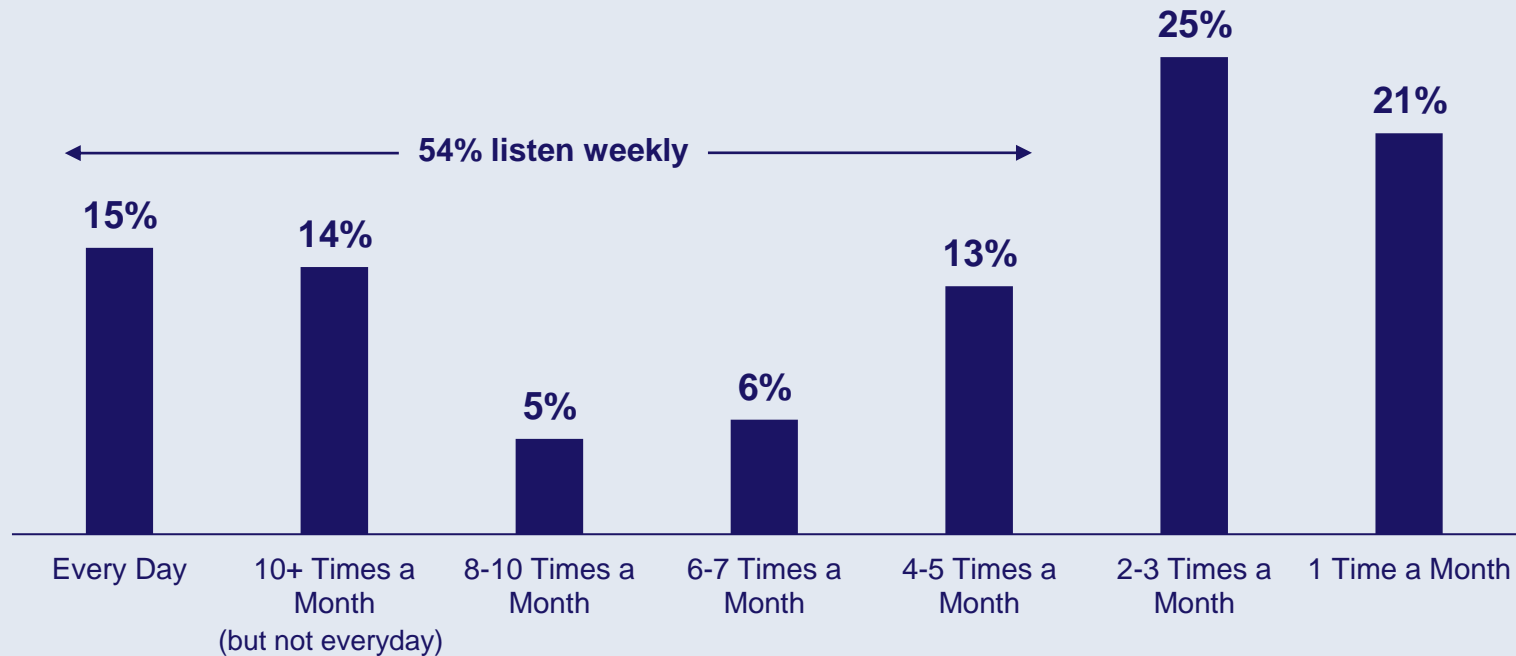
While TV viewing is a habitual, daily activity for most people, podcast usage is more infrequent with most listeners selectively tuning into the platform five or less times a month



Frequency of Tune-in
% of users

Frequency	Ad-Supported TV % of TV Viewers	Podcasts % of Podcast Listeners
Every Day	69%	15%
Weekly	91%	54%

How Often Do You Listen to Podcasts?
% of podcast listeners

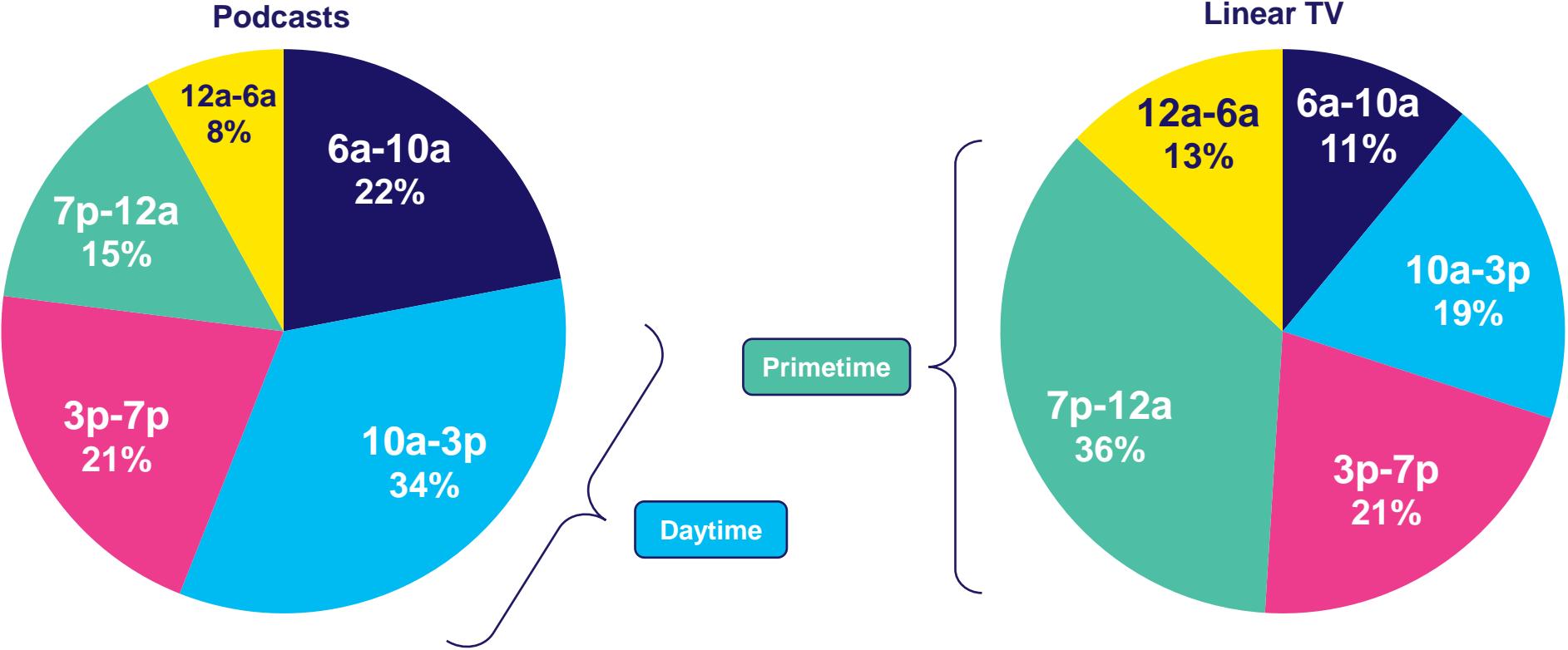


Source: Podcasts - Nielsen, *Podcasting Today: Insights for Podcast Advertisers*, February 2021. Nielsen Scarborough Podcast Listener Buying Power, November 2020 (Listeners Only) Adults 18+. 'Weekly' = listens daily up to 4-5x a month. Ad-Supported TV - VAB analysis of Nielsen R&F Time Period Report, Live+7, Total Day, P18+ TV viewers, viewing source: ad-supported cable TV & broadcast TV, time period: 11/2/20 – 11/8/20. 'Every day' based on a selected day in November 2020 (11/2/20), 'Weekly' based on a selected week in November 2020 (11/2/20 - 11/8/20).

‘Primetime’ has a different meaning for each platform as TV and podcast consumption skews towards different times, allowing marketers to engage with audiences across these platforms throughout the day



% of Time Spent Watching / Listening by Time of Day



Source: Podcasts - Edison Research, *Share of Ear*, Q4 2019, Q1-Q3, 2020, P13+. Linear TV - VAB analysis of Nielsen R&F Time Period Report, Live+7, Total Day, P13+, viewing source: ad-supported cable TV & broadcast TV, time period: 9/1/20–9/30/20. Percentages may not add up to 100 due to rounding.

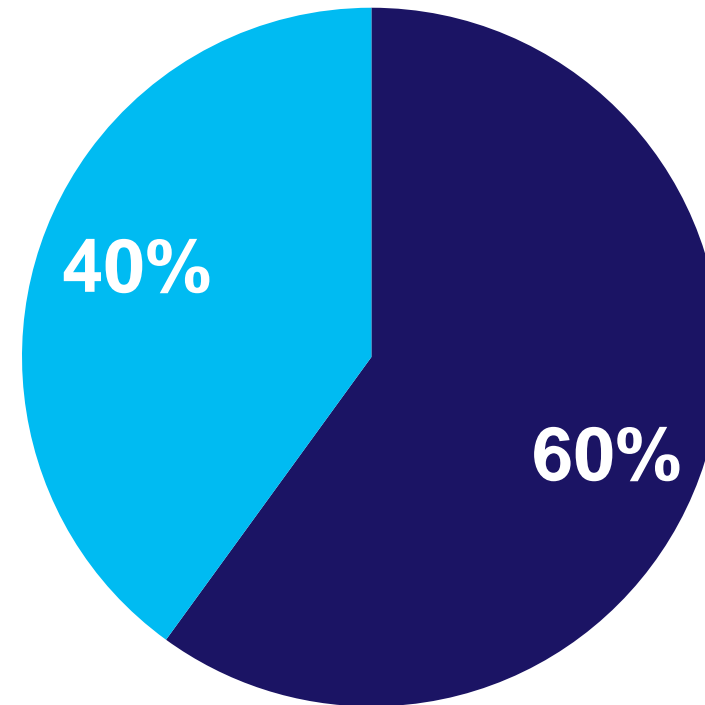


Nearly half of all podcast listening takes place outside the home, providing marketers with incremental opportunities to reach consumers away from their living room



% of Time Spent Listening to Podcasts by Location

■ At Home ■ Outside of the Home



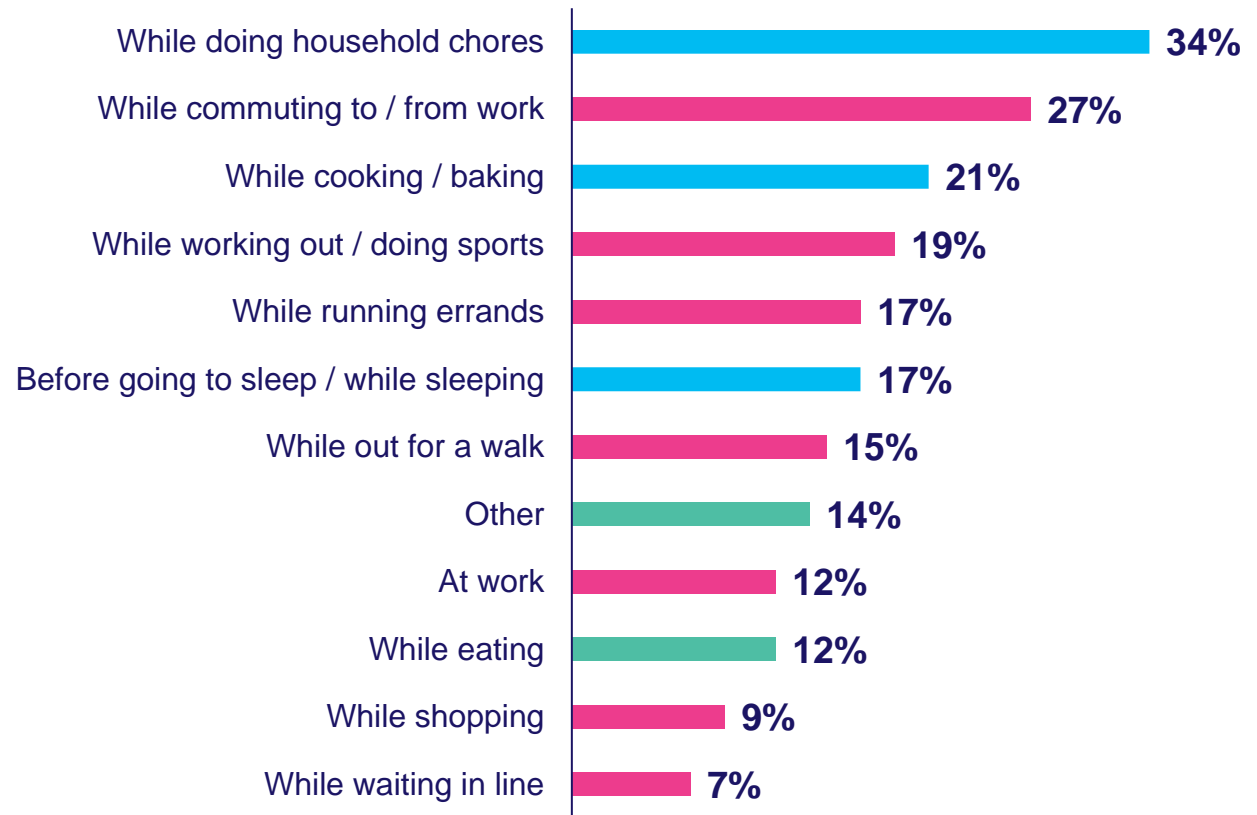
Source: Edison Research, *Share of Ear*, Q4 2019, Q1-Q3, 2020, P13+.



People often listen to podcasts while involved in other activities both inside and out of the home which can lead to more passive engagement



Activities while listening to podcasts



■ At Home ■ Out of Home ■ At Home/Out of Home

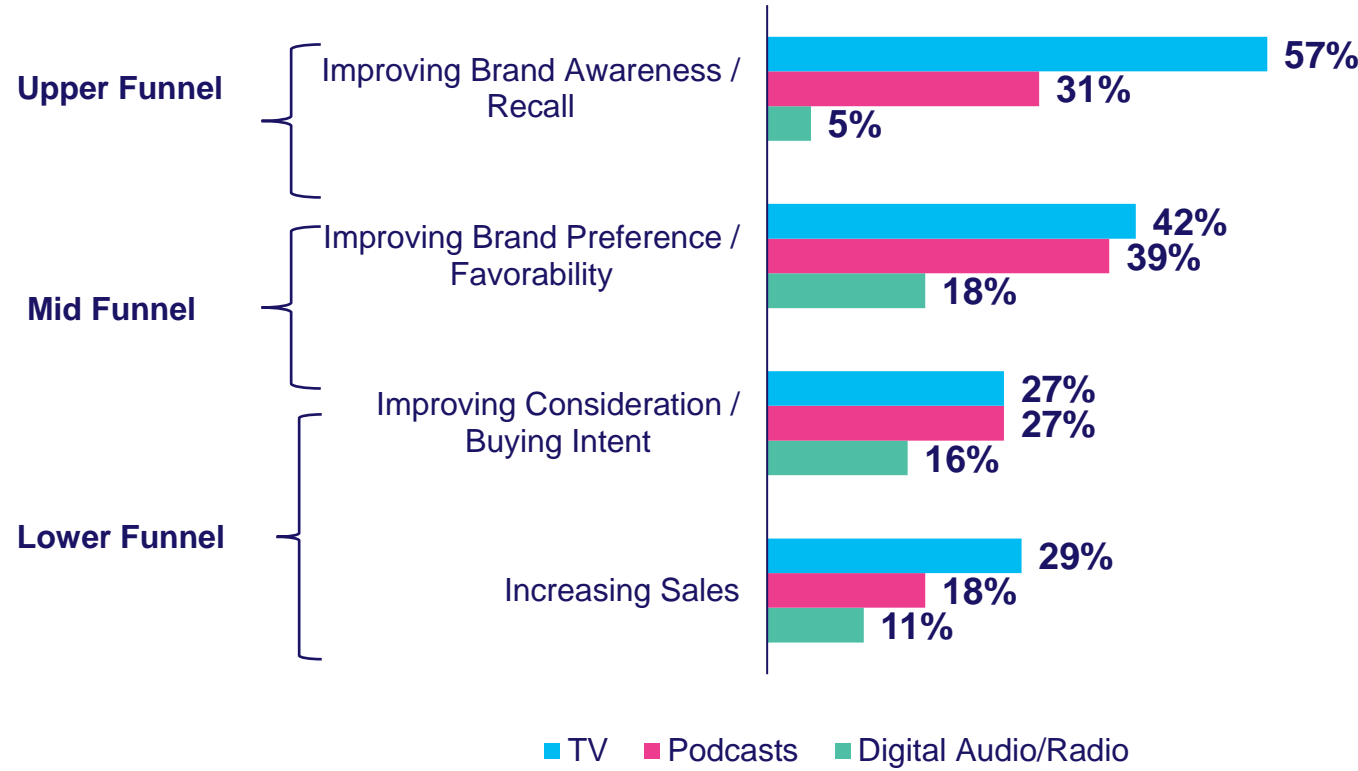
Source: YouGov Profiles, December 2020. 'Out of home' includes: 'in the car,' 'at work,' & 'other'.

However, while TV drives outcomes throughout the entire funnel, adding podcasts to the media mix can build consideration and purchase intent



Media Types Best at Delivering Campaign Objectives

% of advertisers



Source: VAB analysis of Advertiser Perceptions' *Podcast Advertising Market Report*, 2020.

Key Marketer Takeaways

- ▶ While audio podcast usage is growing among consumers, it typically serves as a complement to video viewing rather than a replacement, allowing audiences to access more content across platforms at different times, places and ‘use’ occasions
- ▶ Due to the different roles each platform plays within audiences’ media consumption habits, audio podcasts create incremental opportunities for marketers to reach and engage consumers during ‘non-video viewing’ occasions

Creators

Jason Wiese

SVP, Director of Strategic Insights
jasonw@thevab.com

Leah Montner-Dixon

Associate Insights Director
leahm@thevab.com

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