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Podcasting's Video Dilemma

December 2023



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Podcasting's Video Dilemma

DECEMBER 2023



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Methodology:

- In November 2023, Sounds Profitable partnered with **Signal Hill Insights** to field an online study of 1155 podcast listeners, ages 18+, who had consumed at least one video podcast in the last 30 days
- The sample was weighted to the most recent census data to be representative of the US population and to The Podcast Landscape, a representative survey of over 2400 Americans 18+ conducted in the Summer of 2023
- Respondents were asked a variety of questions about video and audio podcast consumption, including content, context, and location preferences for both, as well as advertising receptivity and other media-related behaviors

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The Dilemma:

What even *is* a Podcast – and do people know the difference?



Q3 | 2023



TOP 50 PODCASTS IN THE US

SHOWS WITH THE LARGEST WEEKLY AUDIENCE

	TITLE	PRODUCER
1	The Joe Rogan Experience	Joe Rogan
2	Crime Junkie	audiochuck
3	The Daily	The New York Times
4	This American Life	This American Life
5	This Past Weekend w/Theo Von	Theo Von

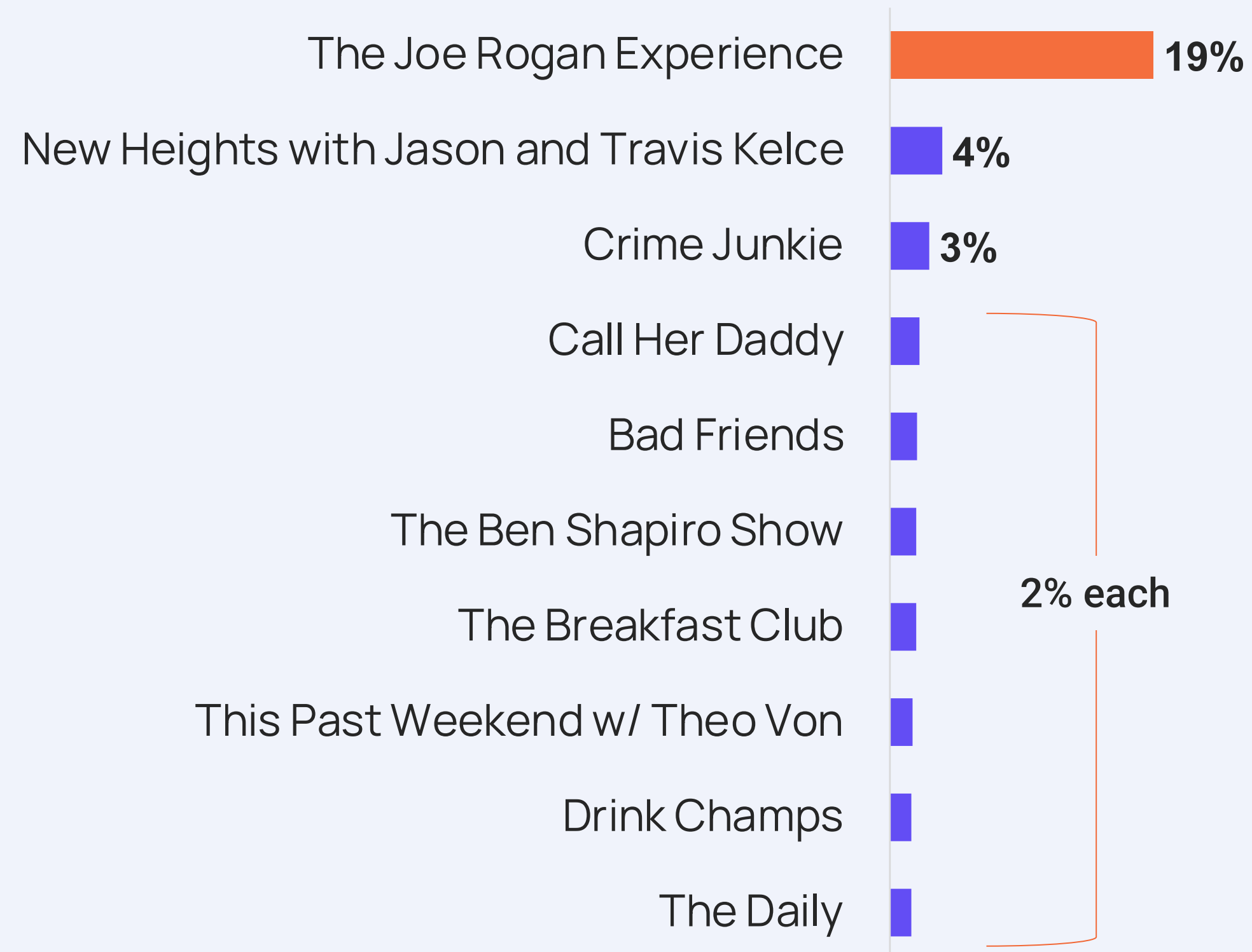
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Top 3 favorite podcasts on video?

Watched video podcast in last 30 days



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Do you watch the Joe Rogan Experience on video?

Watched video podcast in last 30 days



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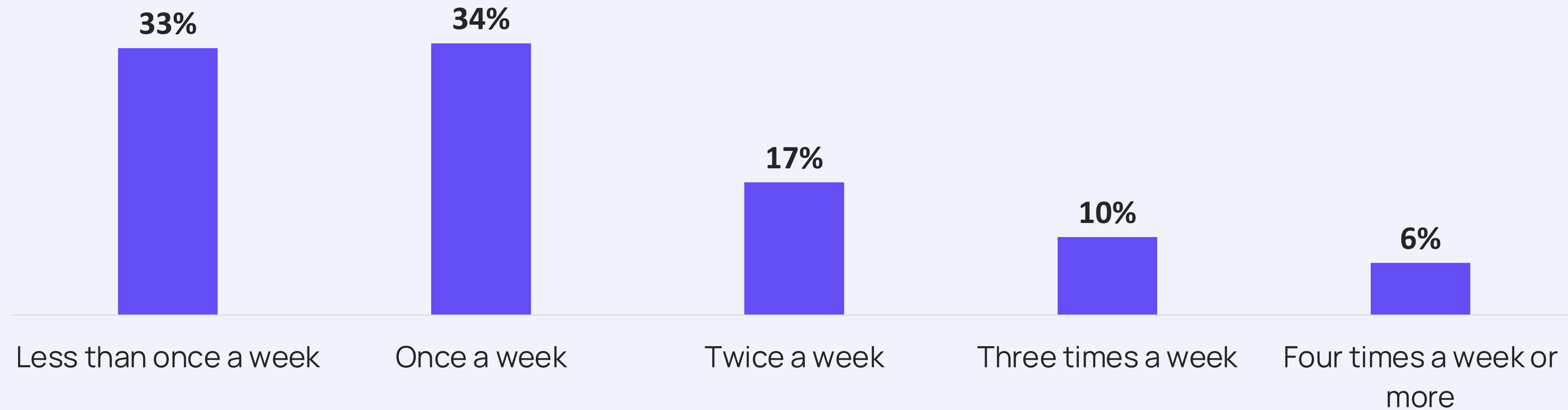
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How often do you watch the Joe Rogan Experience on video?

Watched video podcast in last 30 days, watch the Joe Rogan Experience on video



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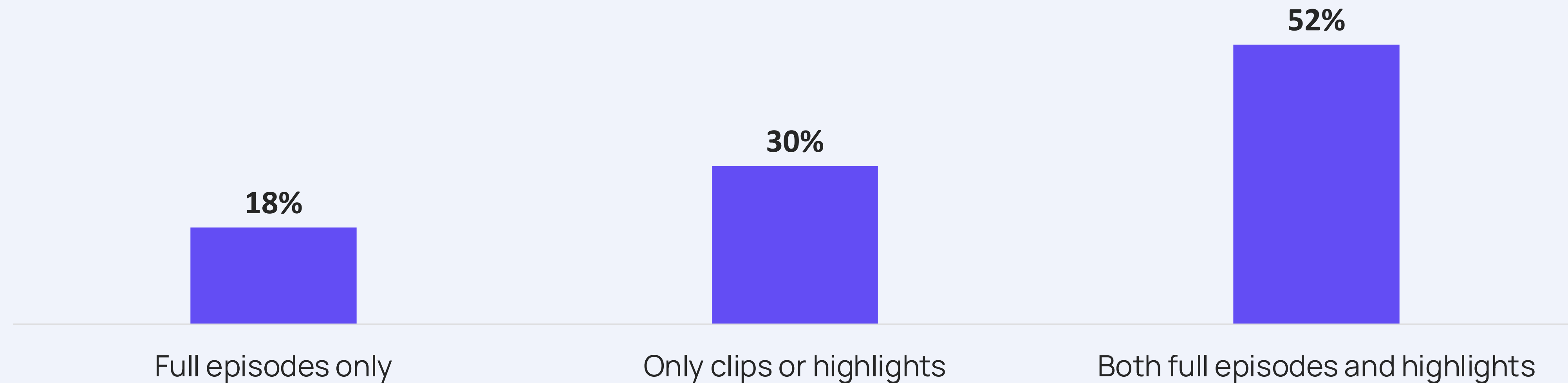
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Do you watch clips/highlights (under 30 minutes) or full episodes of the Joe Rogan Experience?

Watched video podcast in last 30 days, watch the Joe Rogan Experience on video



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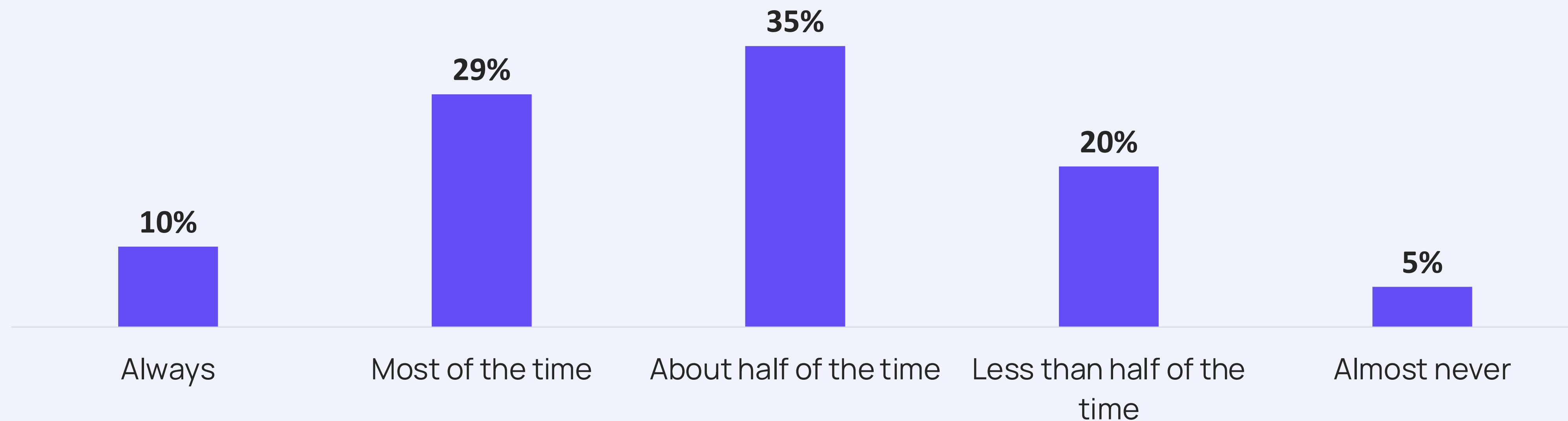
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How often do you watch a complete full episode (2+ hours) of the Joe Rogan Experience?

Watched video podcast in last 30 days, watch full episodes or full episodes and highlights



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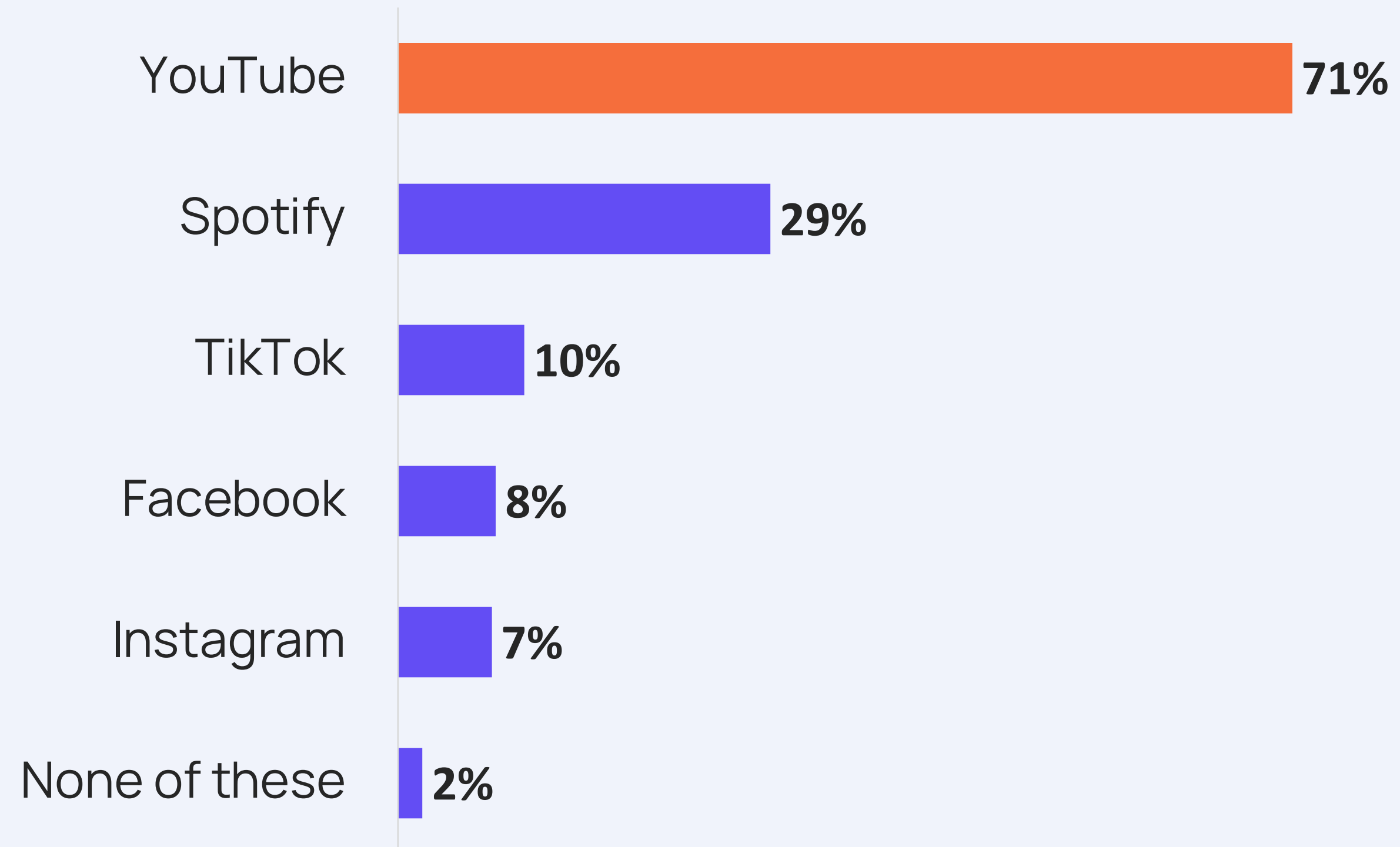
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Where do you watch the Joe Rogan Experience on video?

Watched video podcast in last 30 days, watch the Joe Rogan Experience on video



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Who Watches Podcasts?



Video Podcast Consumers are Audio Consumers

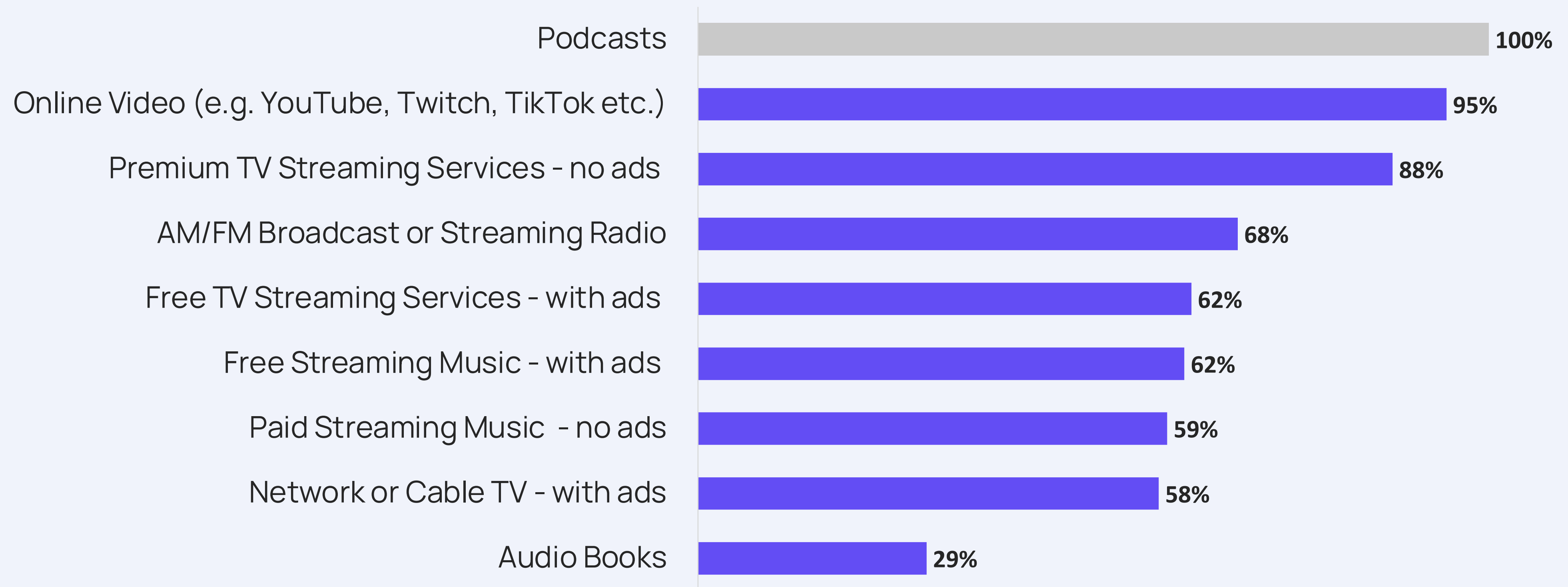
The Video Podcast consumer is very

- much a spoken word consumer – in video and audio



Which of the following types of media have you used in the past month or 30 days?

Watched video podcast in last 30 days



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Have you listened to a podcast on audio in the past month or 30 days?

Watched video podcast in last 30 days

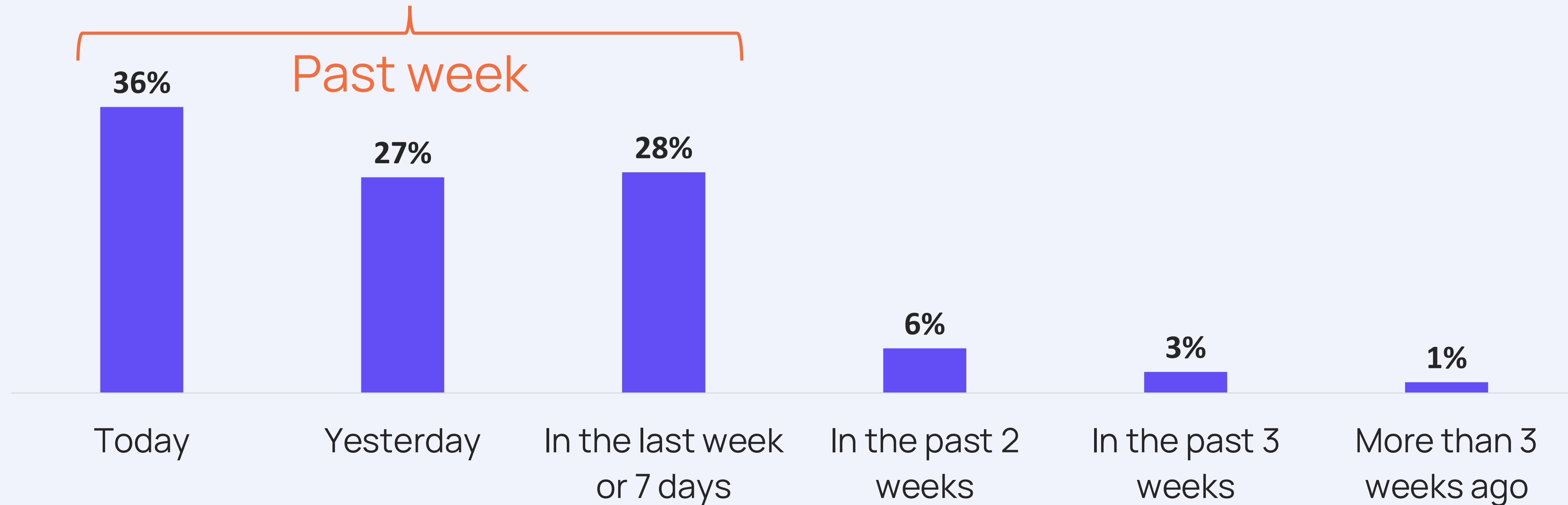


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When was the last time you consumed any type of podcast?

90% Watched video podcast in last 30 days



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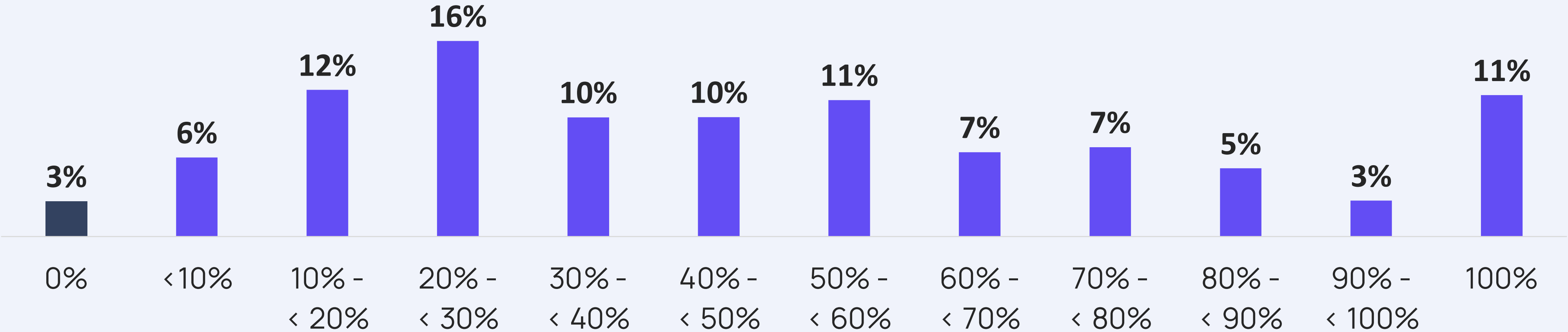
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How much time spent with podcasts was spent watching podcasts on video?

Watched video podcast in last 30 days, time spent past week

Mean: 47.3



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Thinking about the podcasts you watch on video, do you ever listen to the same ones without video, on services that primarily have audio, such as Apple Podcasts or Spotify?

Watched video podcast in last 30 days



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Video Podcast Consumers are Audio Consumers

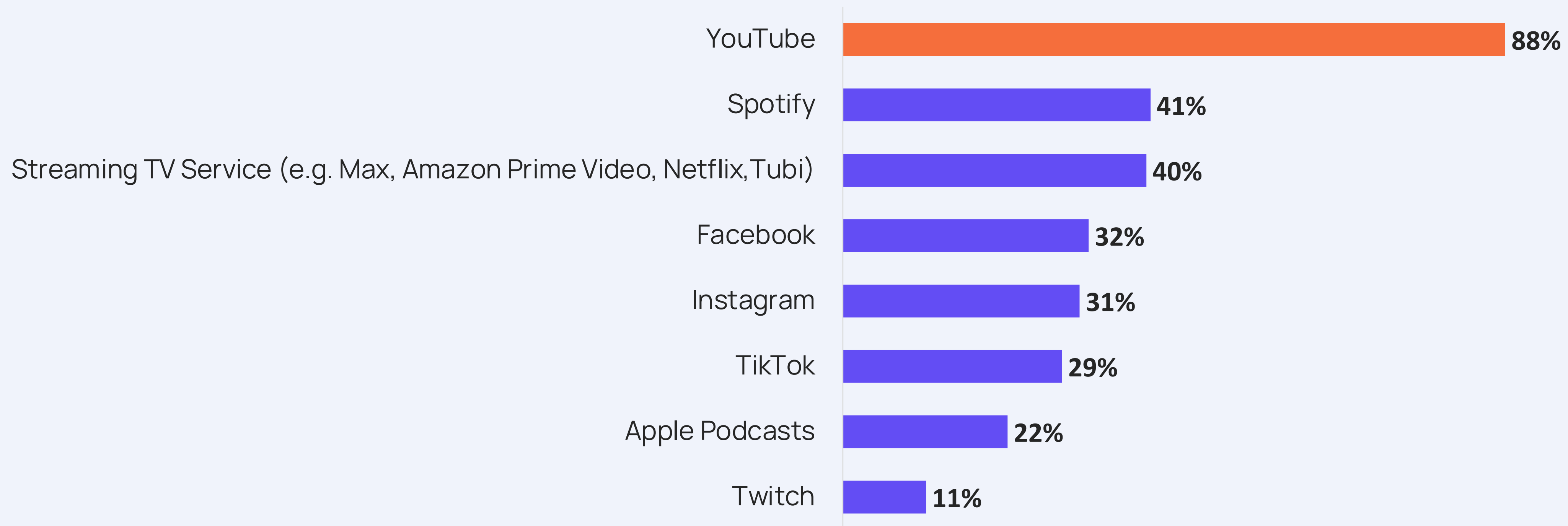
The Video Podcast consumer is very much a spoken word consumer – in video and audio

Video consumers also are not monolithic in their platform usage for podcasts – they don't only use YouTube



Which of the following services have you used to watch a podcast on video in the past month or 30 days?

Watched video podcast in last 30 days



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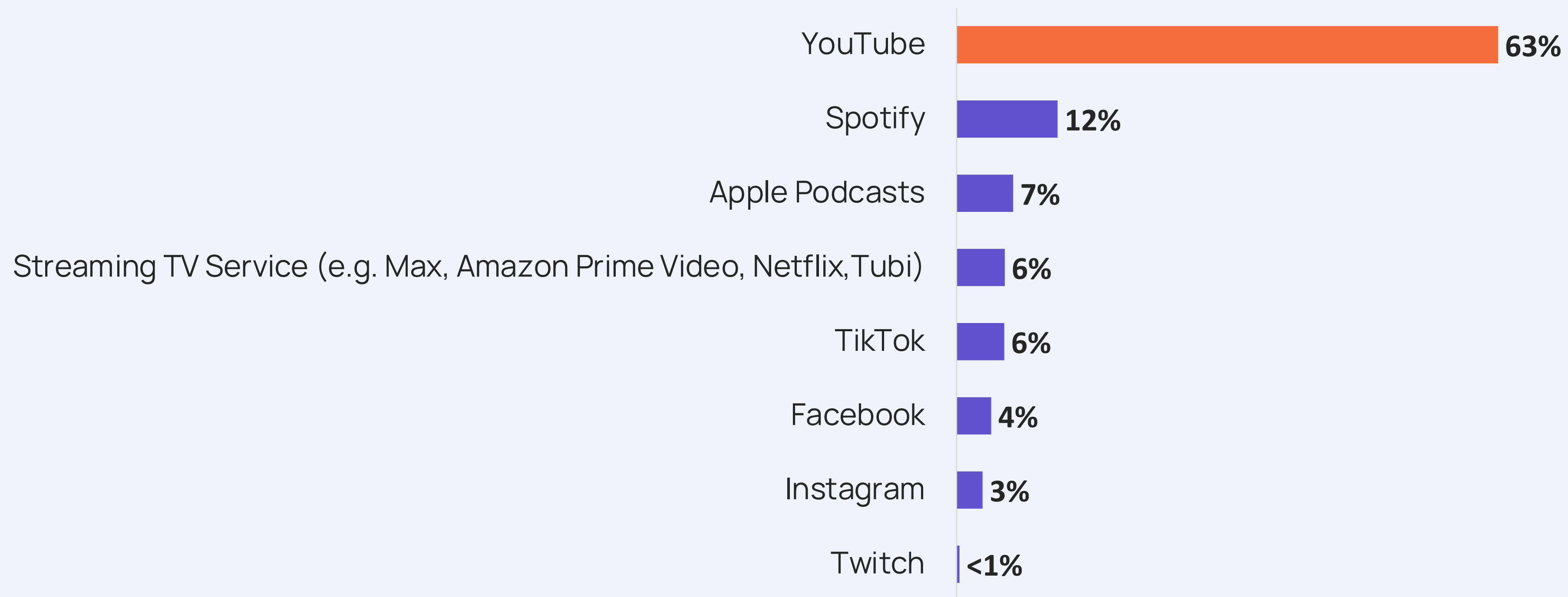
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Which one of the services you selected do you use most often to watch podcasts on video?

Watched video podcast in last 30 days



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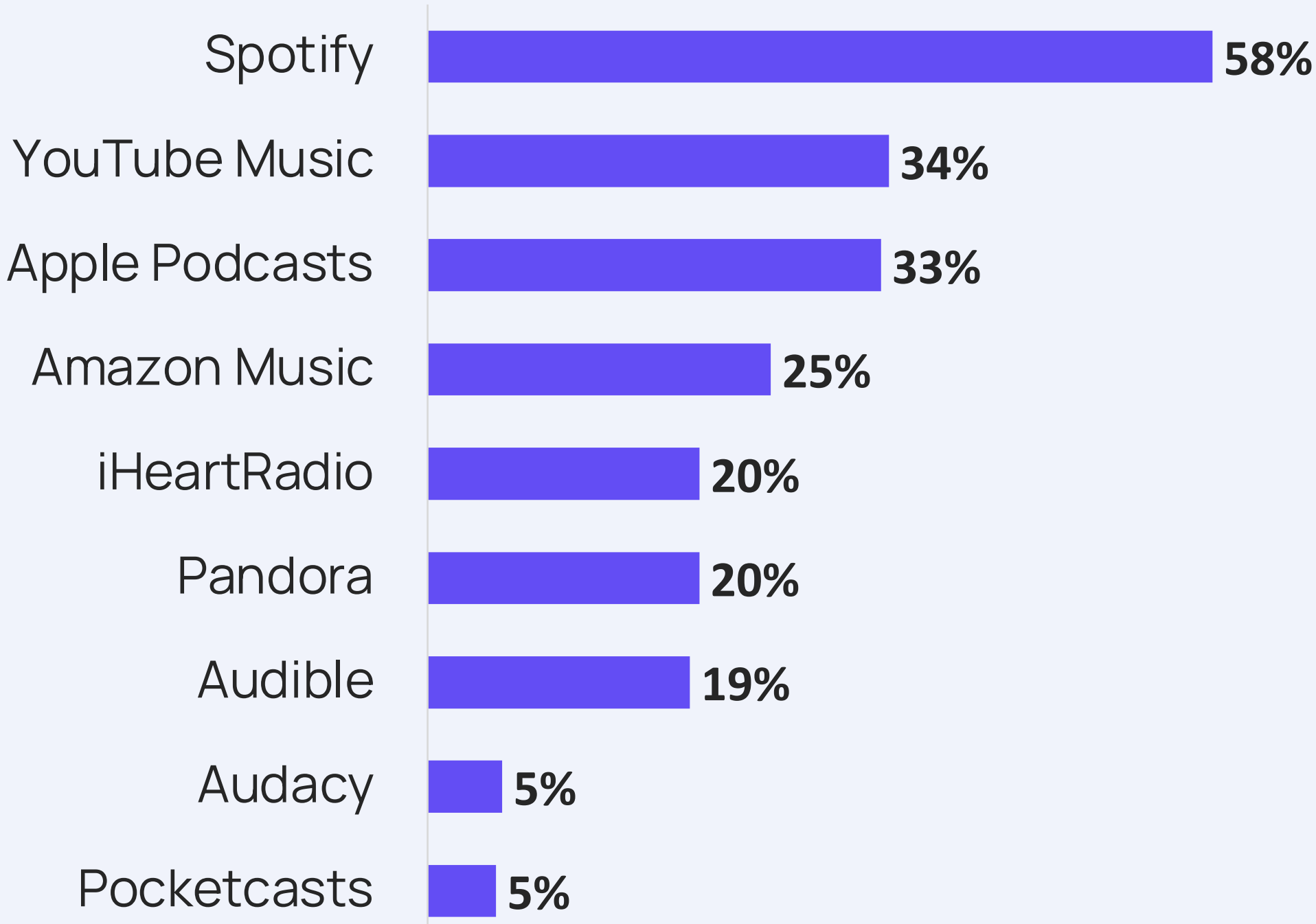
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Which of the following services have you used to listen to a podcast on audio in the past month or 30 days?

Watched video podcast in last 30 days and listened to podcast on audio in the last 30 days



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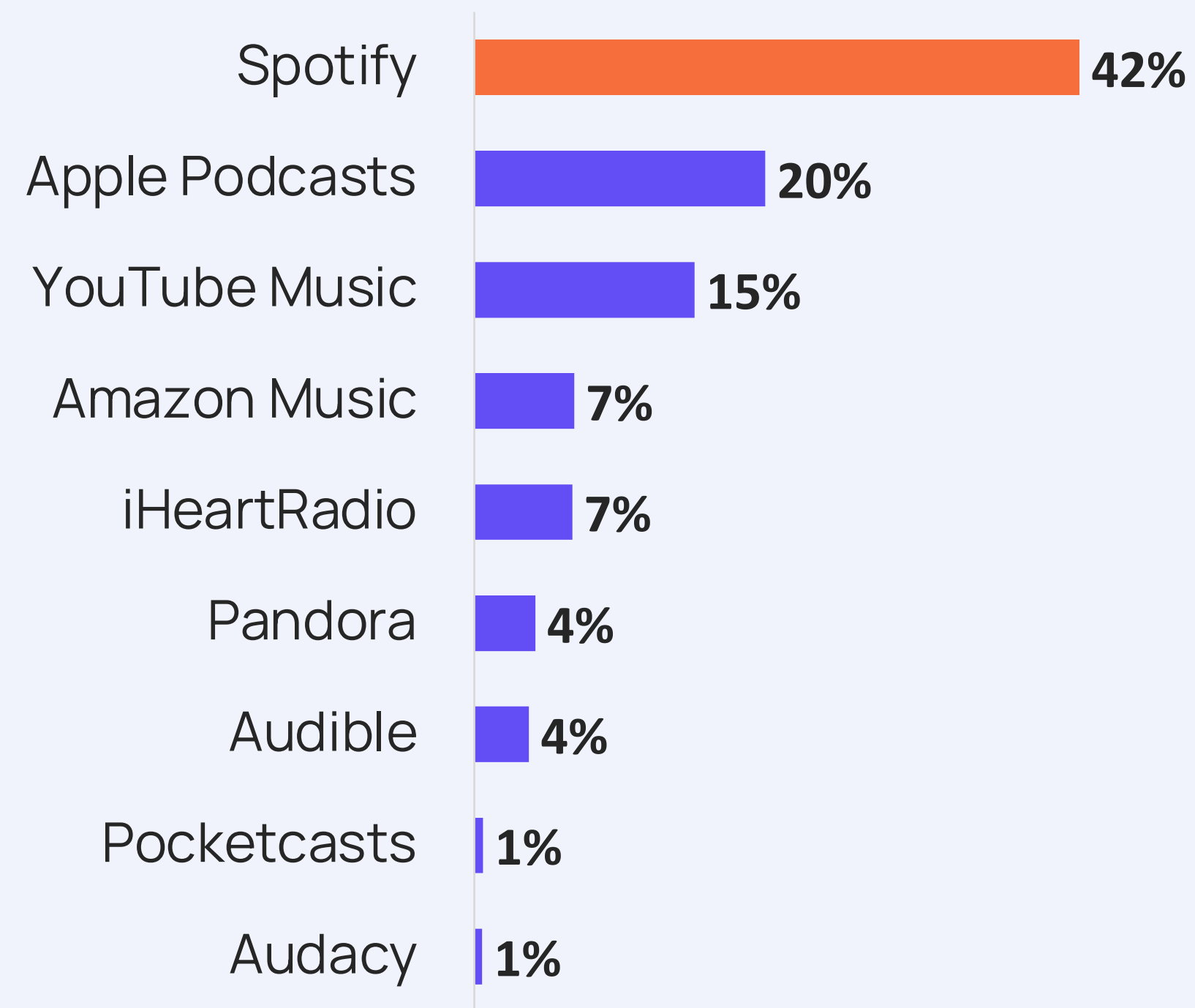
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Which one of the services you selected do you use most often to listen to podcasts on audio?

Listened to podcast on audio in last 30 days, listened 1+ services



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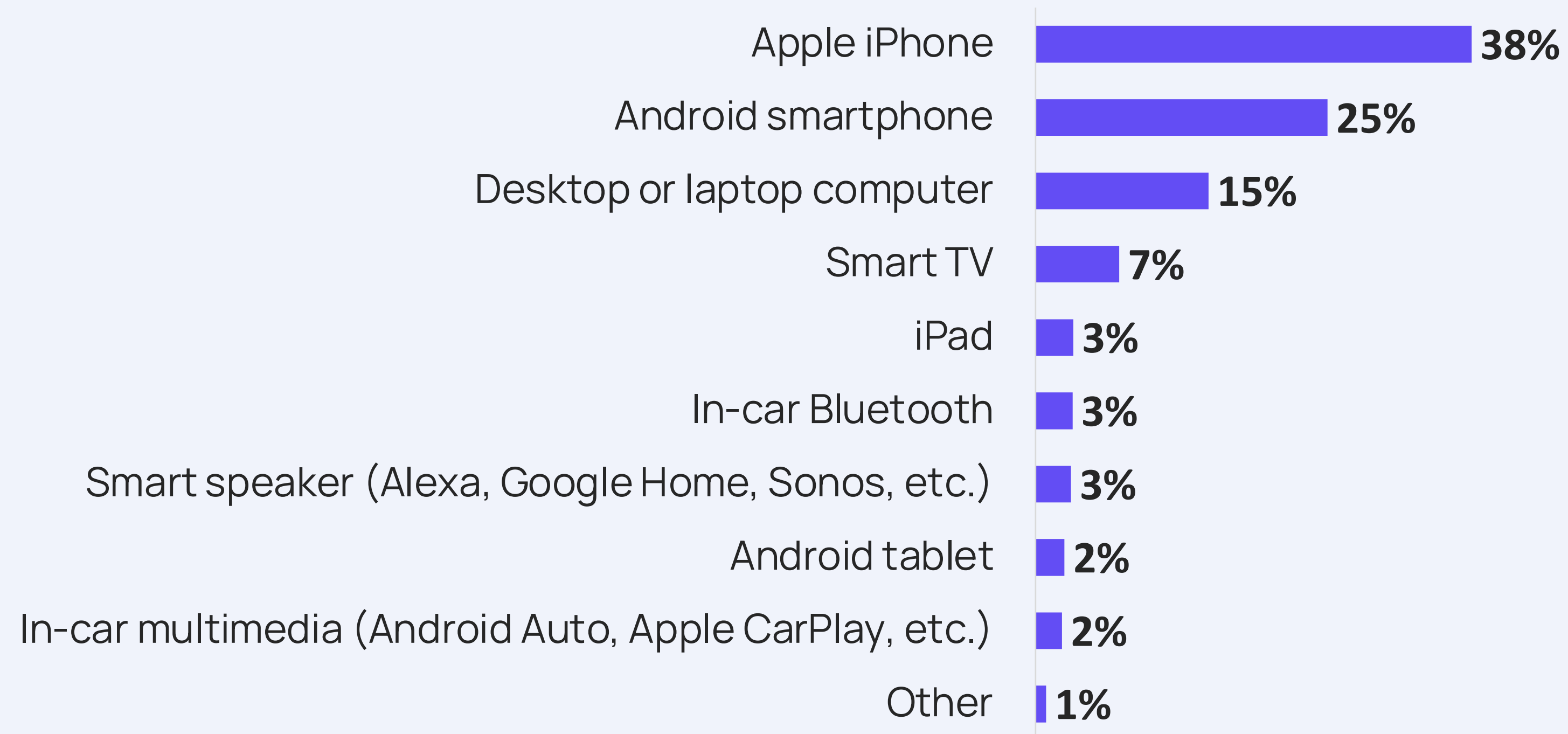
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What device do you use most often to consume any type of podcast, audio or video?

Watched video podcast in last 30 days



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Video Podcast Consumers are Audio Consumers

The Video Podcast consumer is very much a spoken word consumer – in video and audio

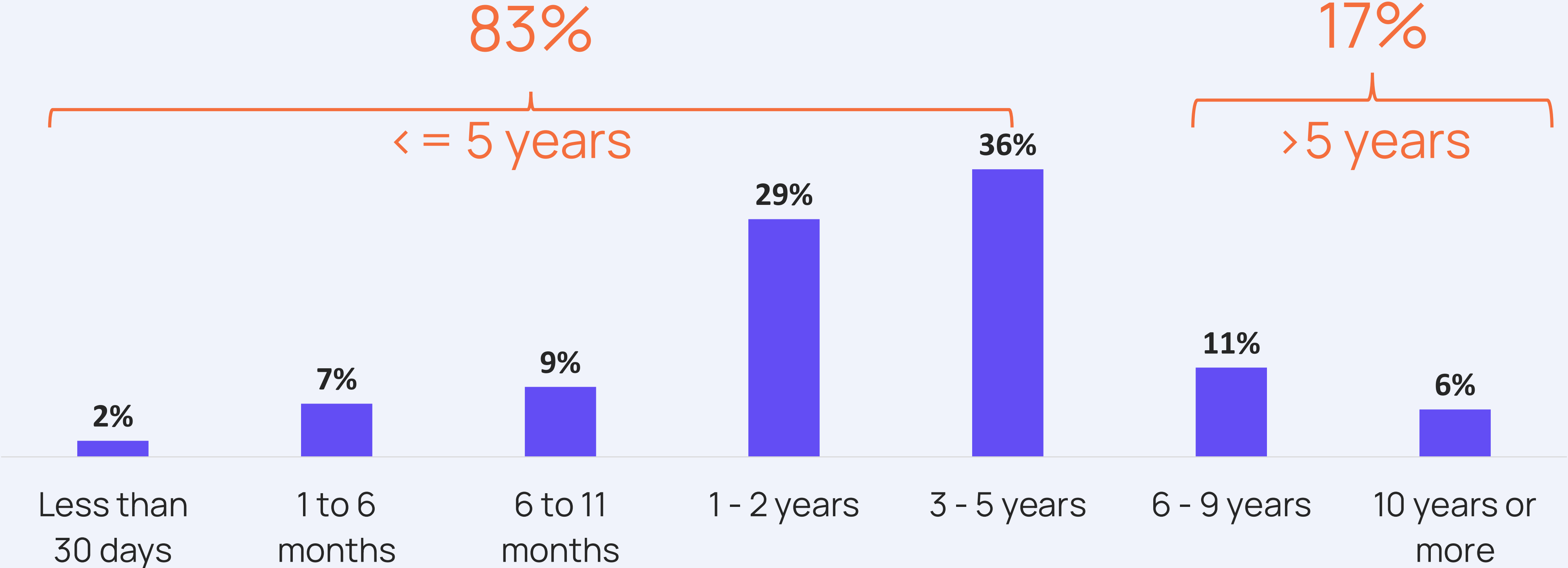
Video consumers also are not monolithic in their platform usage for podcasts – they don't only use YouTube

They are also most likely to have found podcasting within the last five years – likely through Spotify or YouTube



How long have you been using podcasts, in general?

Watched video podcast in last 30 days



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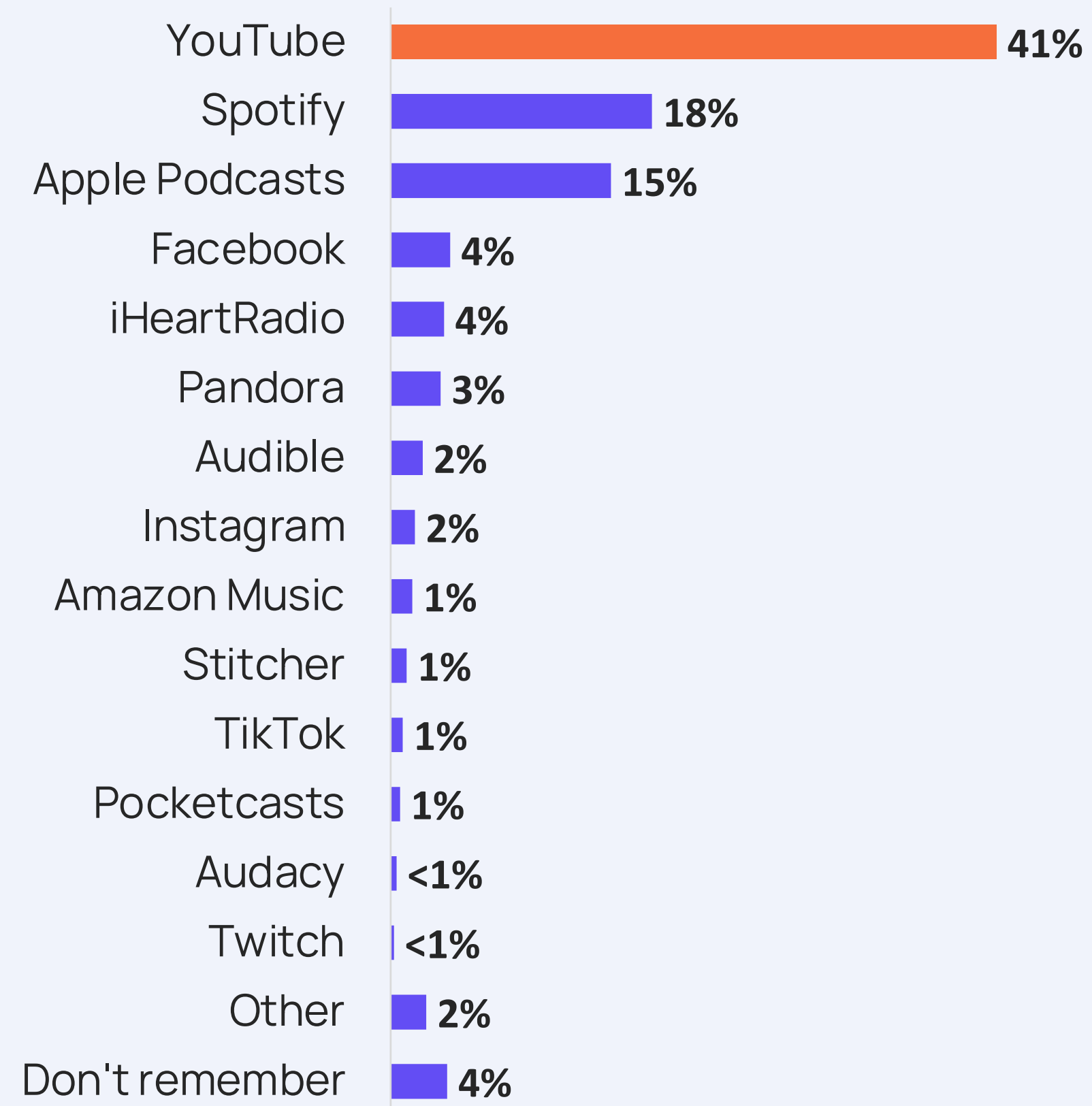


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What was the first service or platform you used?

Watched video podcast in last 30 days



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What Video Podcast
Consumers Watch



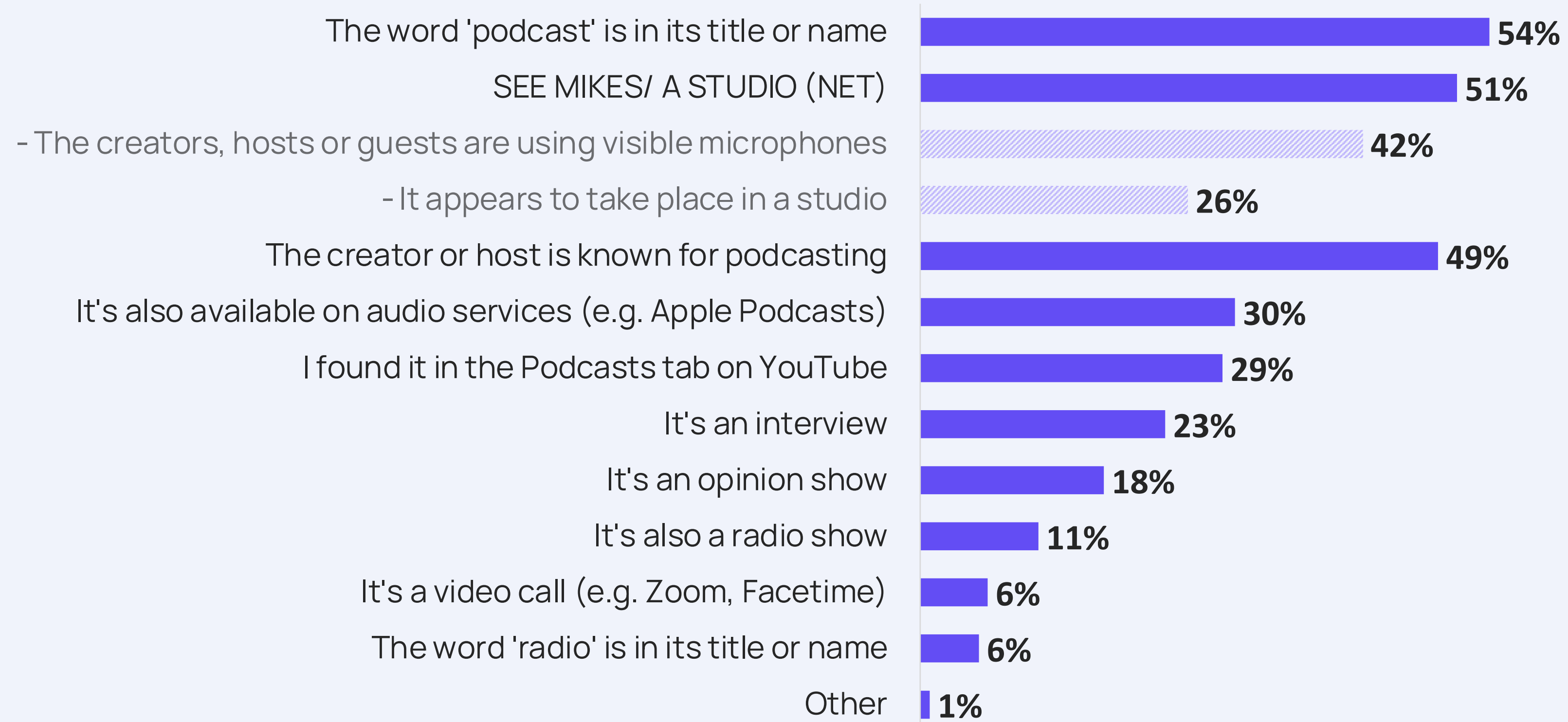
The **Video Podcast** Choice is Clearly Defined

Consumers aren't confused about what
 they are watching – they have a clear
idea of what a podcast is



How do you know that the video you are watching is a podcast?

Watched video podcast in last 30 days



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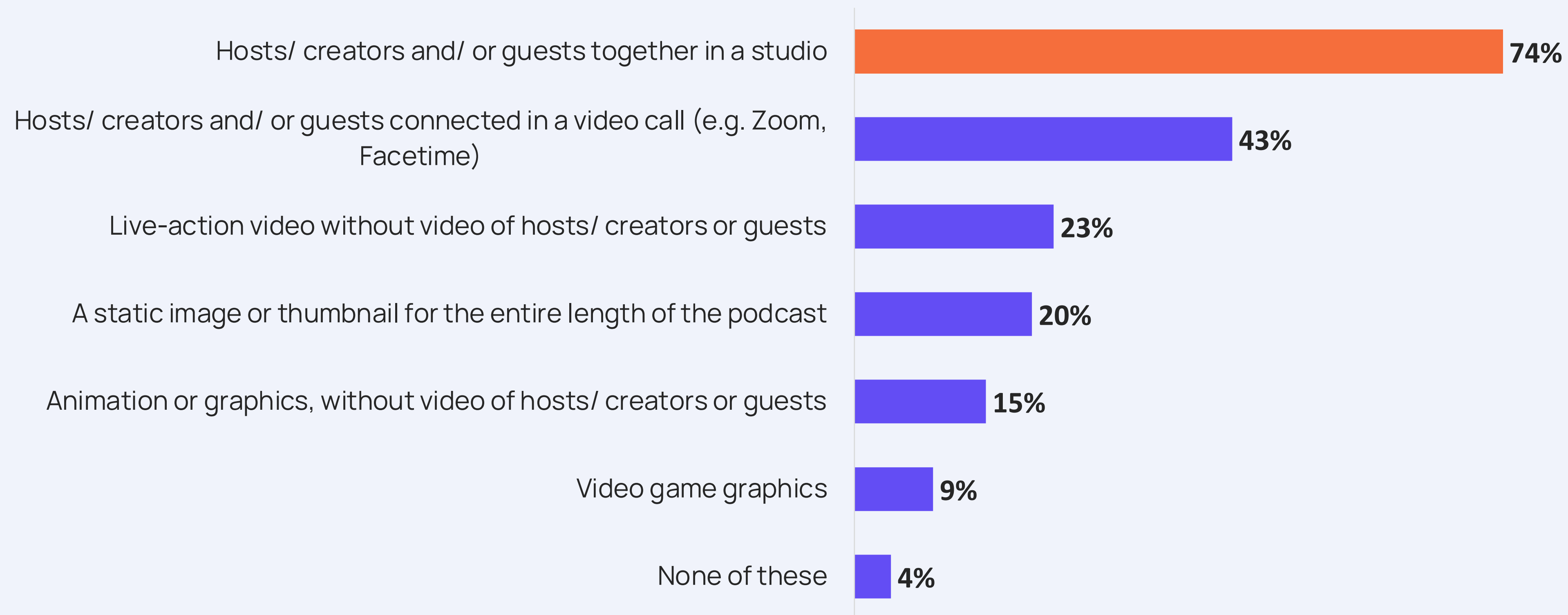
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Thinking about what is on screen, which of the following visuals are in the podcasts you watch on video?

Watched video podcast in last 30 days



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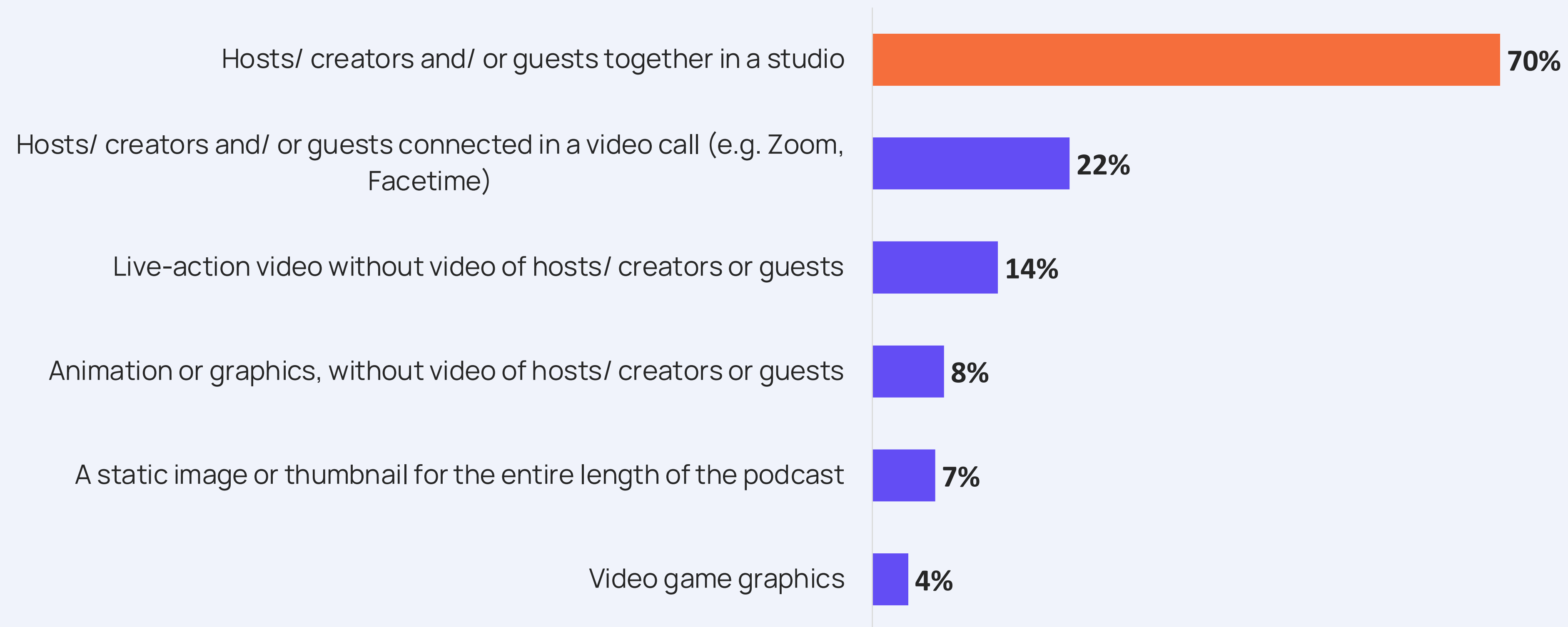
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Which of the following visuals do you prefer to see in the podcasts you watch on video?

Watched video podcast in last 30 days , 1+ visual selected



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The **Video Podcast** Choice is Clearly Defined

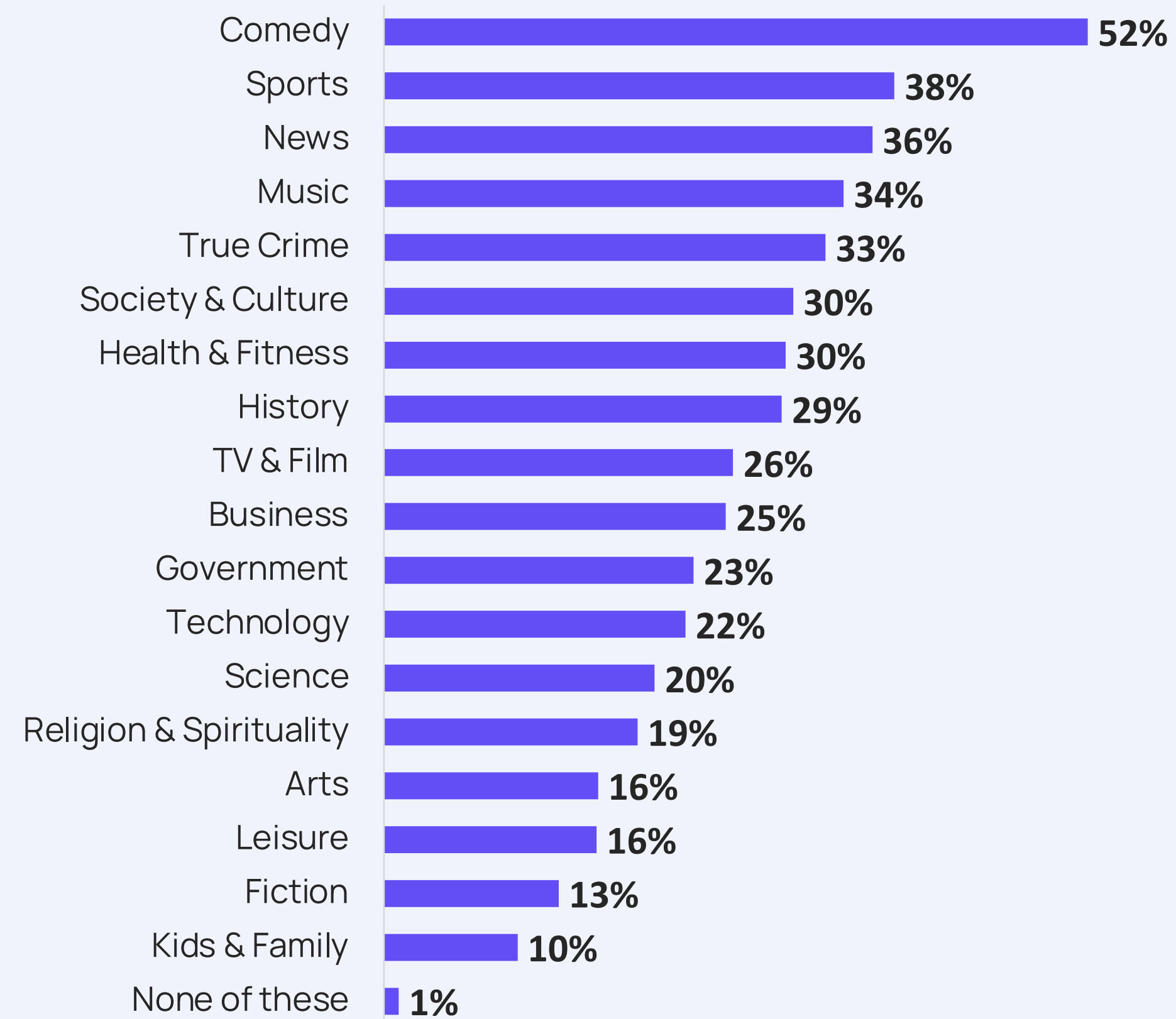
Consumers aren't confused about what they are watching – they have a clear idea of what a podcast is

They generally like the same topics as audio-only listeners, though music is an outlier – perhaps due to licensing



What categories of podcasts do you consume?

Watched video podcast in last 30 days



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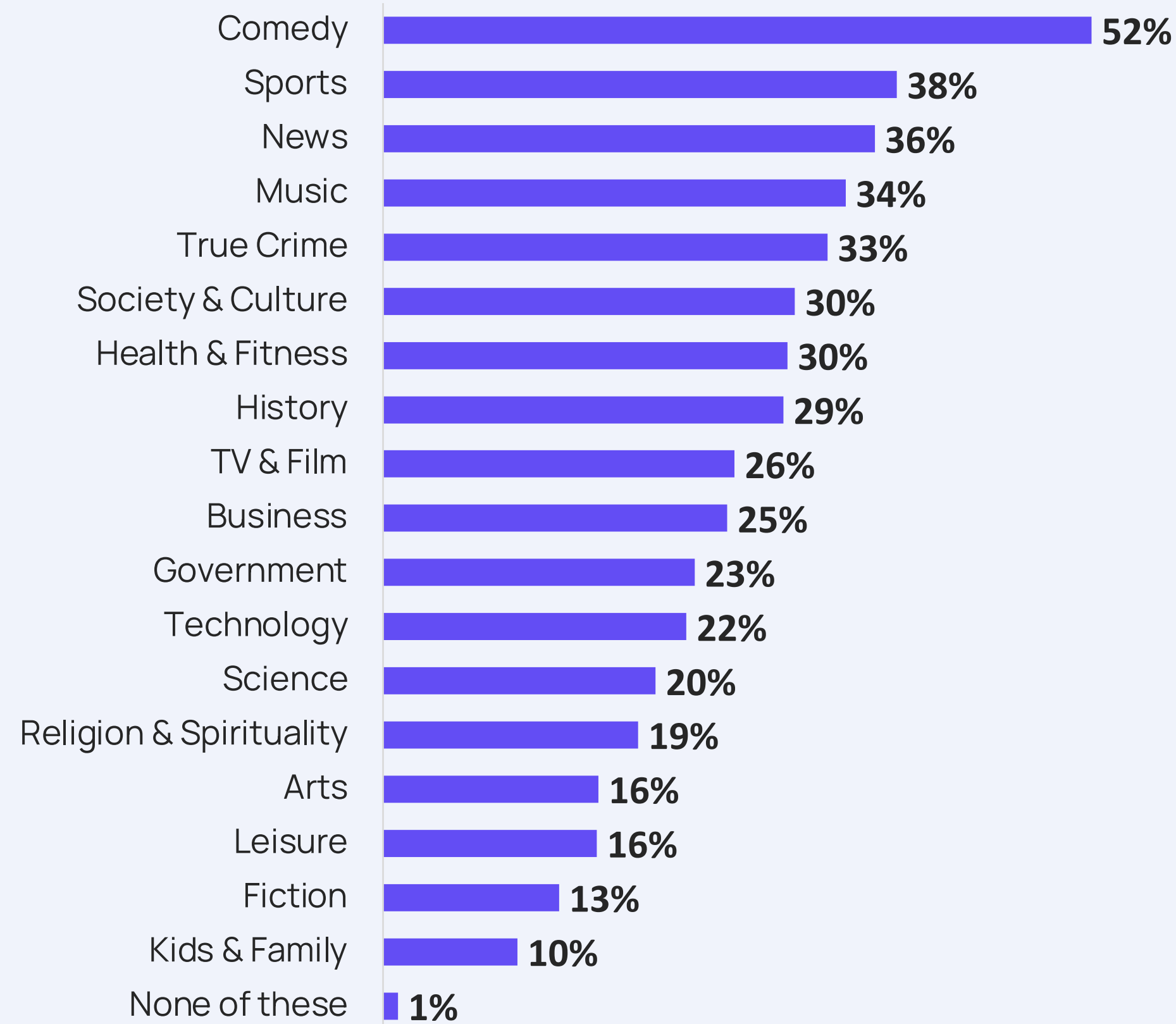
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What categories of podcasts do you consume?

Watched video podcast in last 30 days

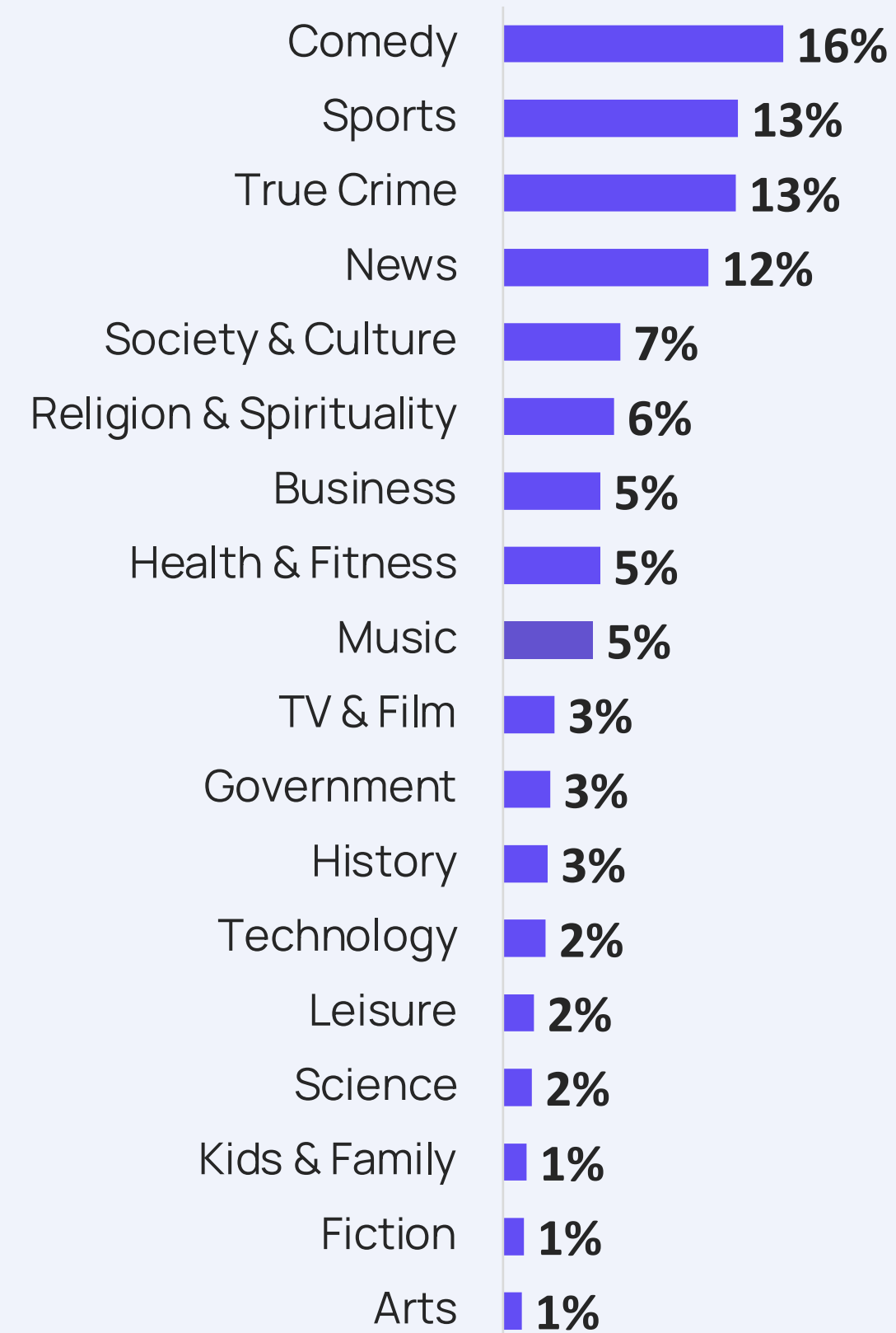


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What categories of podcasts do you consume most often?

Watched video podcast in last 30 days, consume 1+ podcast categories



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The **Video Podcast** Choice is Clearly Defined

Consumers aren't confused about what they are watching – they have a clear idea of what a podcast is

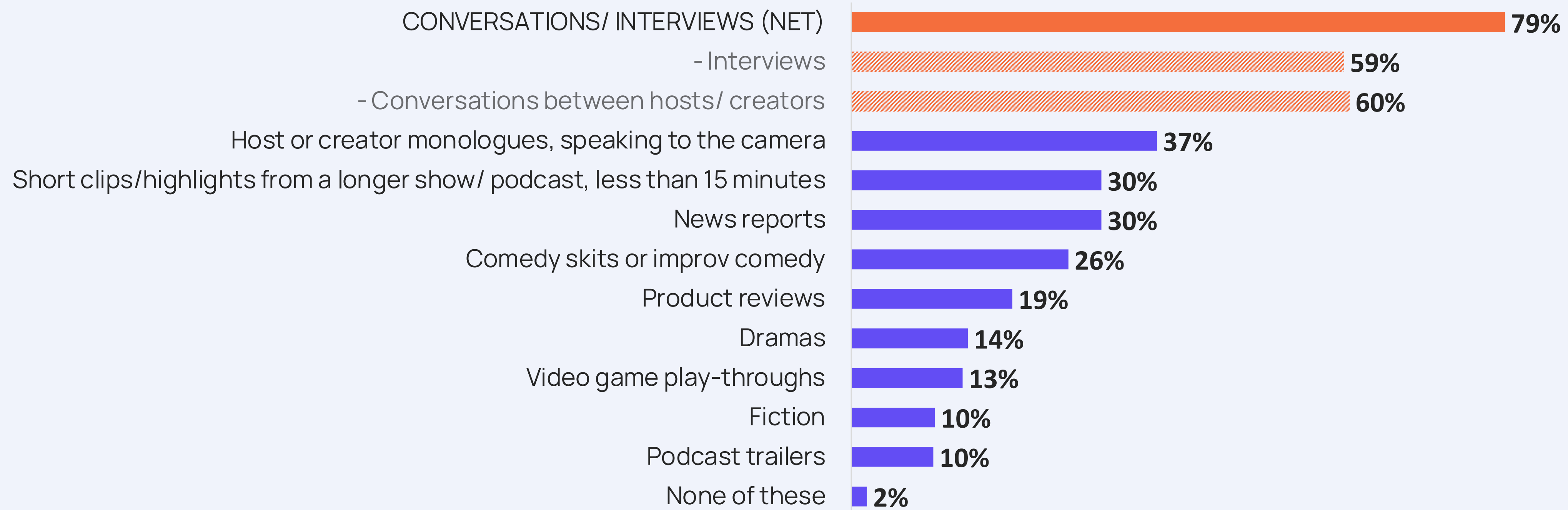
They generally like the same topics as audio-only listeners, though music is an outlier – perhaps due to licensing

What is more important is the format of the show, and not the genre, with a bias towards unscripted content



Which of the following types of podcasts do you watch on video?

Watched video podcast in last 30 days



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Which of the following types of podcasts do you prefer to watch on video?

Watched video podcast in last 30 days, 1+ podcast video type watched



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Why Video?



The **Video Podcast** Choice is Clearly Defined

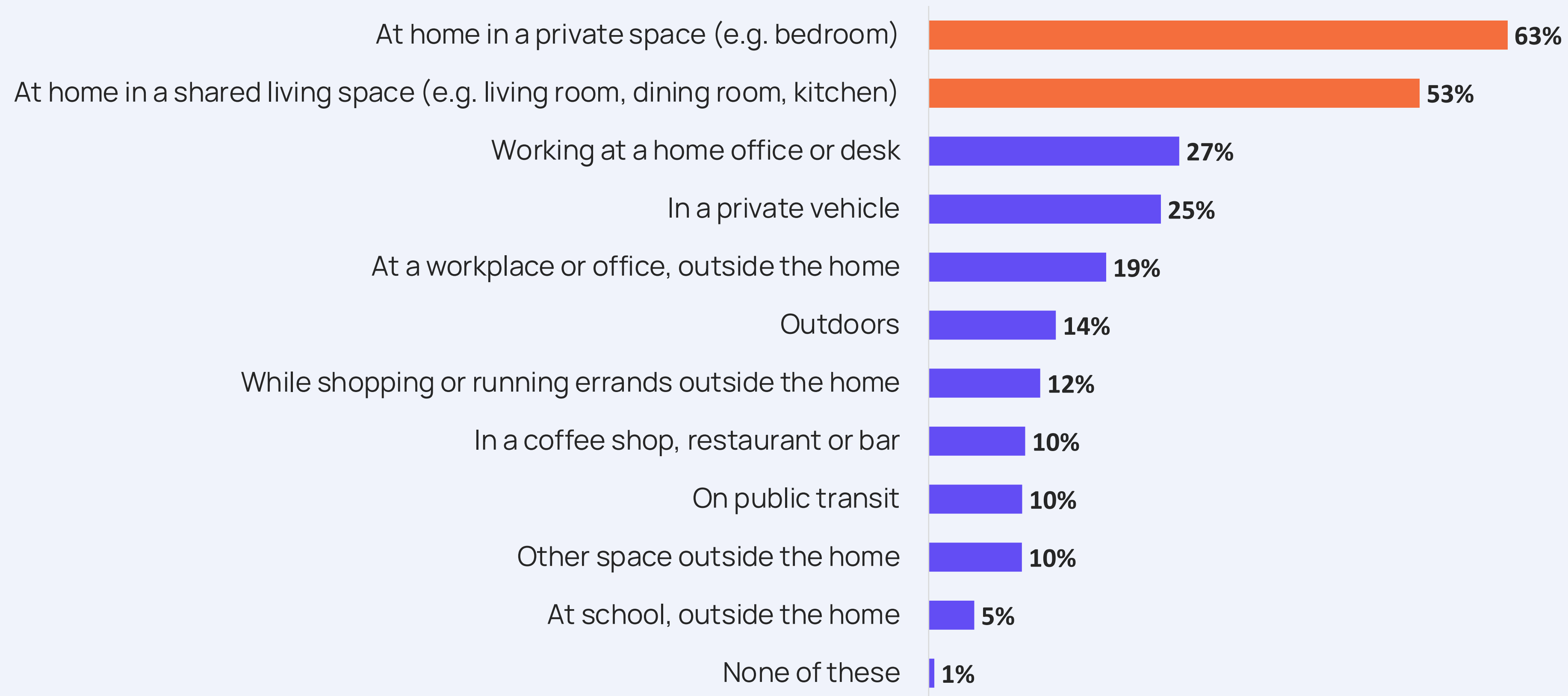
Podcast consumers choose video in

- locations and contexts where they can lean forward, not lean back



In what locations do you watch podcasts on video?

Watched video podcast in last 30 days



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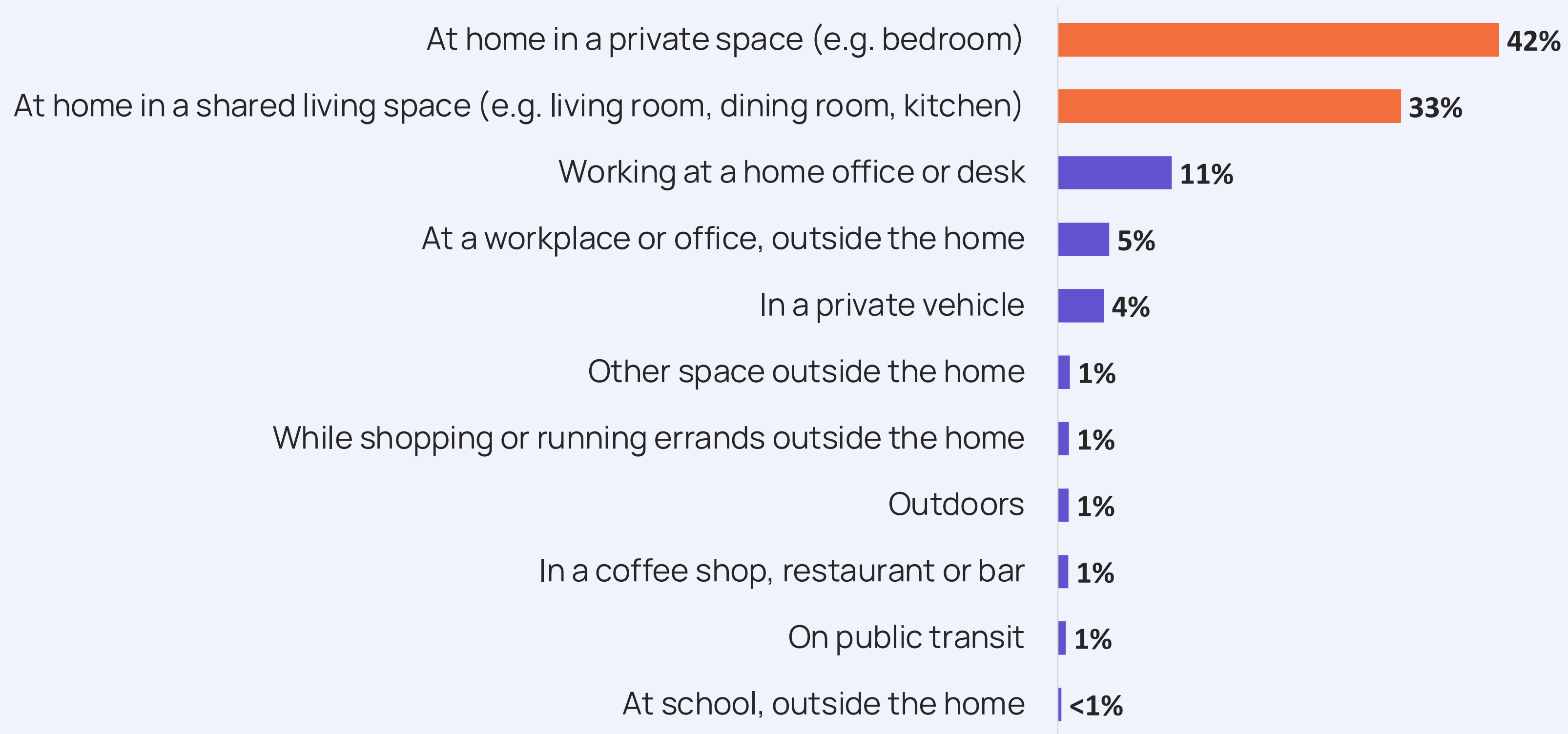
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In what location do you watch podcasts on video most often?

Location watch podcasts on video specified



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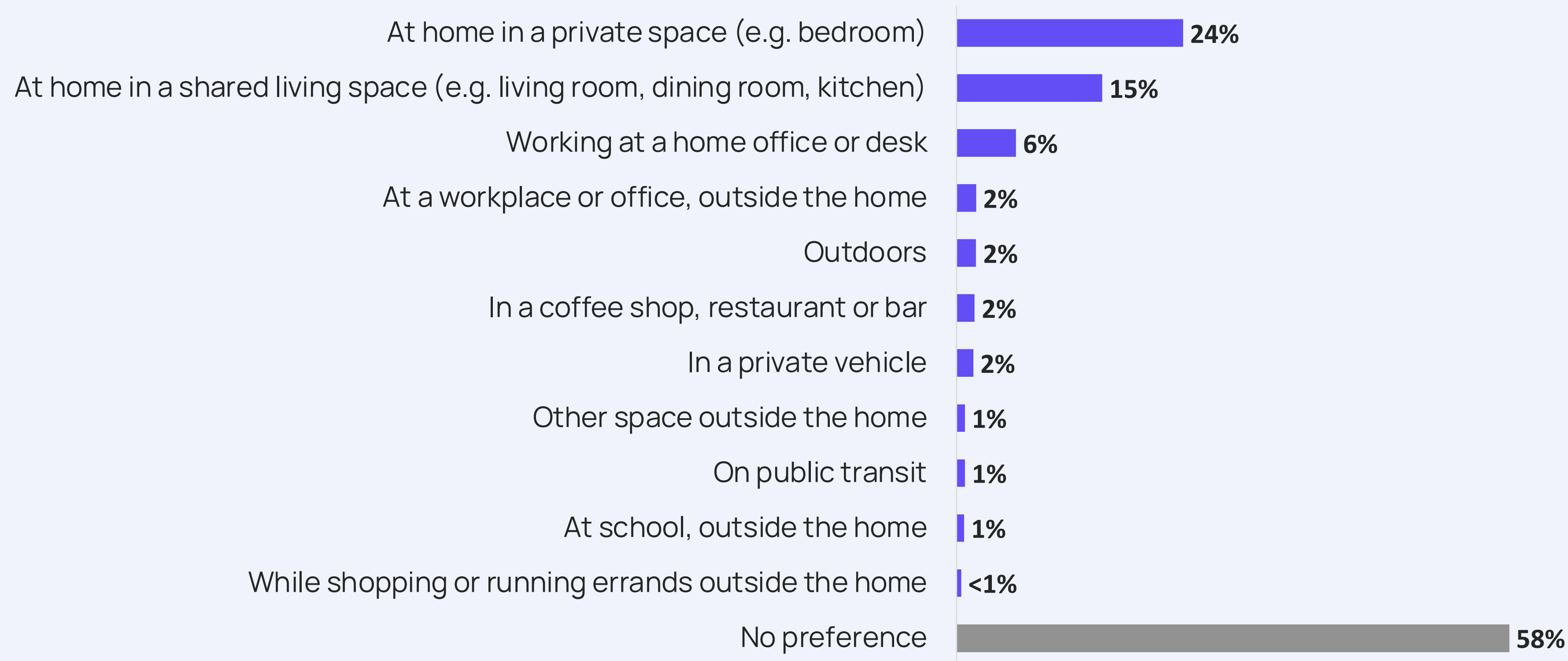
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In what location(s) do you prefer to watch podcasts on video?

Watched video/locations watched video specified



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The **Video Podcast** Choice is Clearly Defined

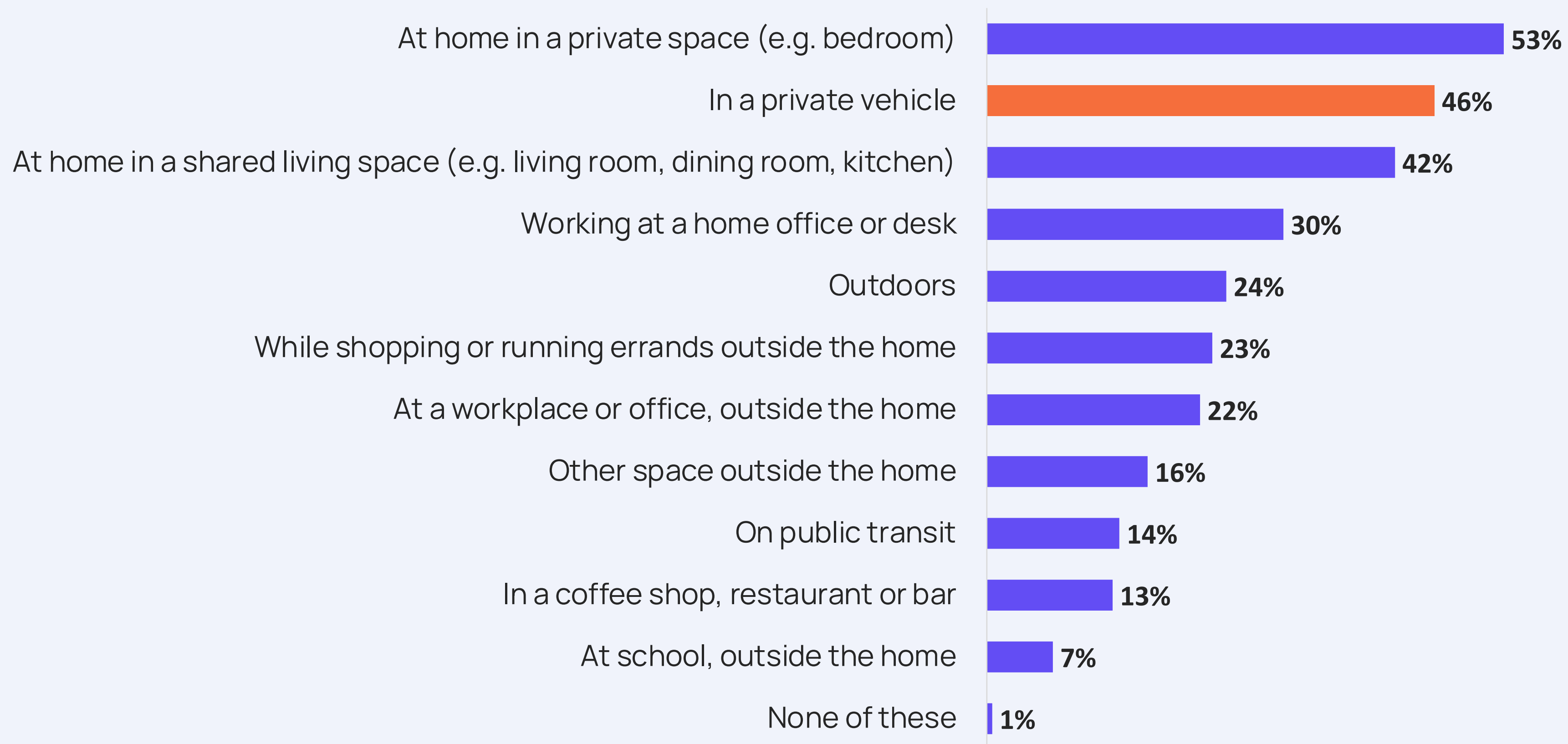
Podcast consumers choose video in locations and contexts where they can lean forward, not lean back

These same consumers will switch to audio - even for the same podcasts - when driving or otherwise occupied



In what locations do you listen to podcasts on audio?

Watched video podcast in last 30 days and listened to podcast on audio in the last 30 days



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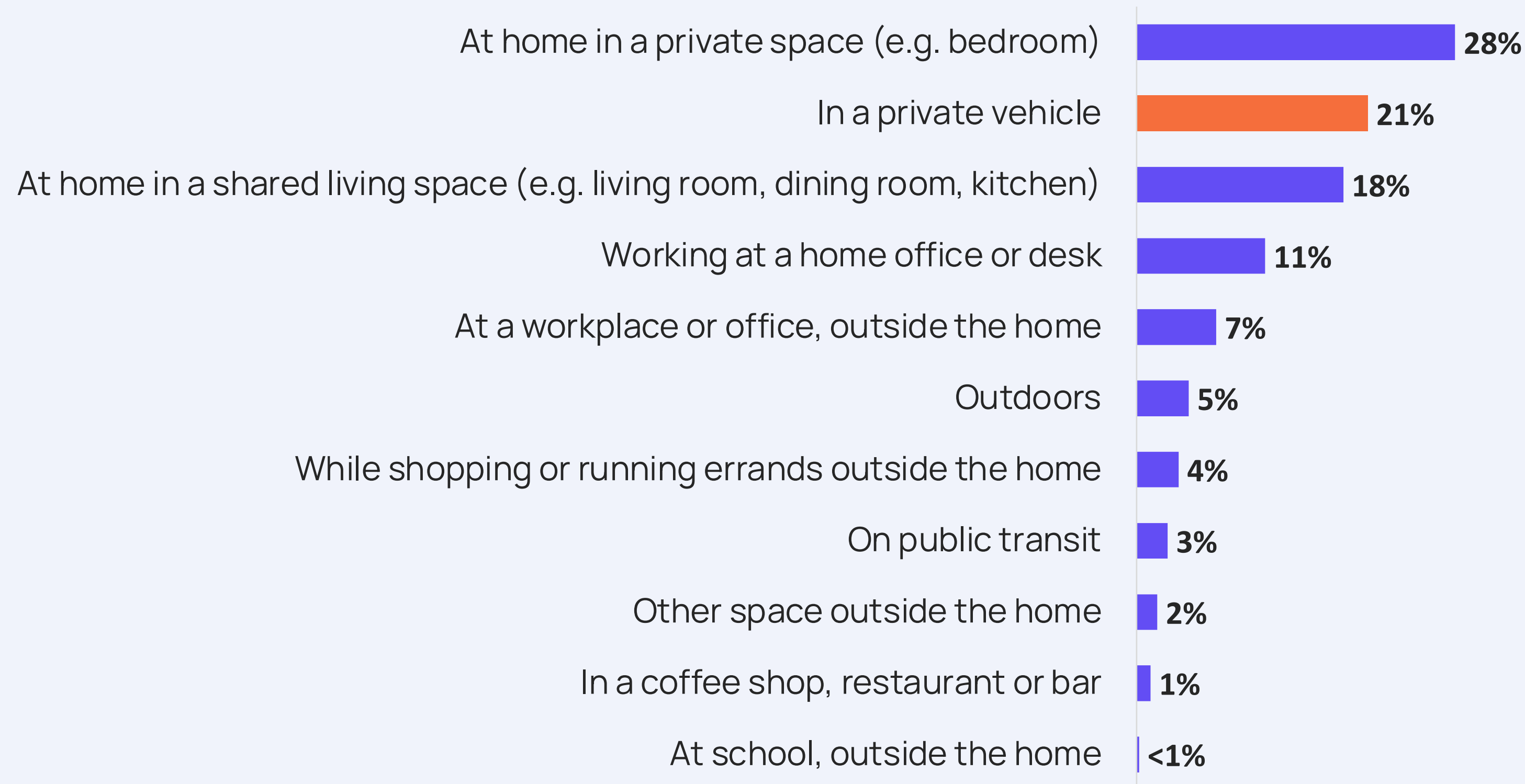
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In what location do you listen to podcasts on audio most often?

Location listened audio specified



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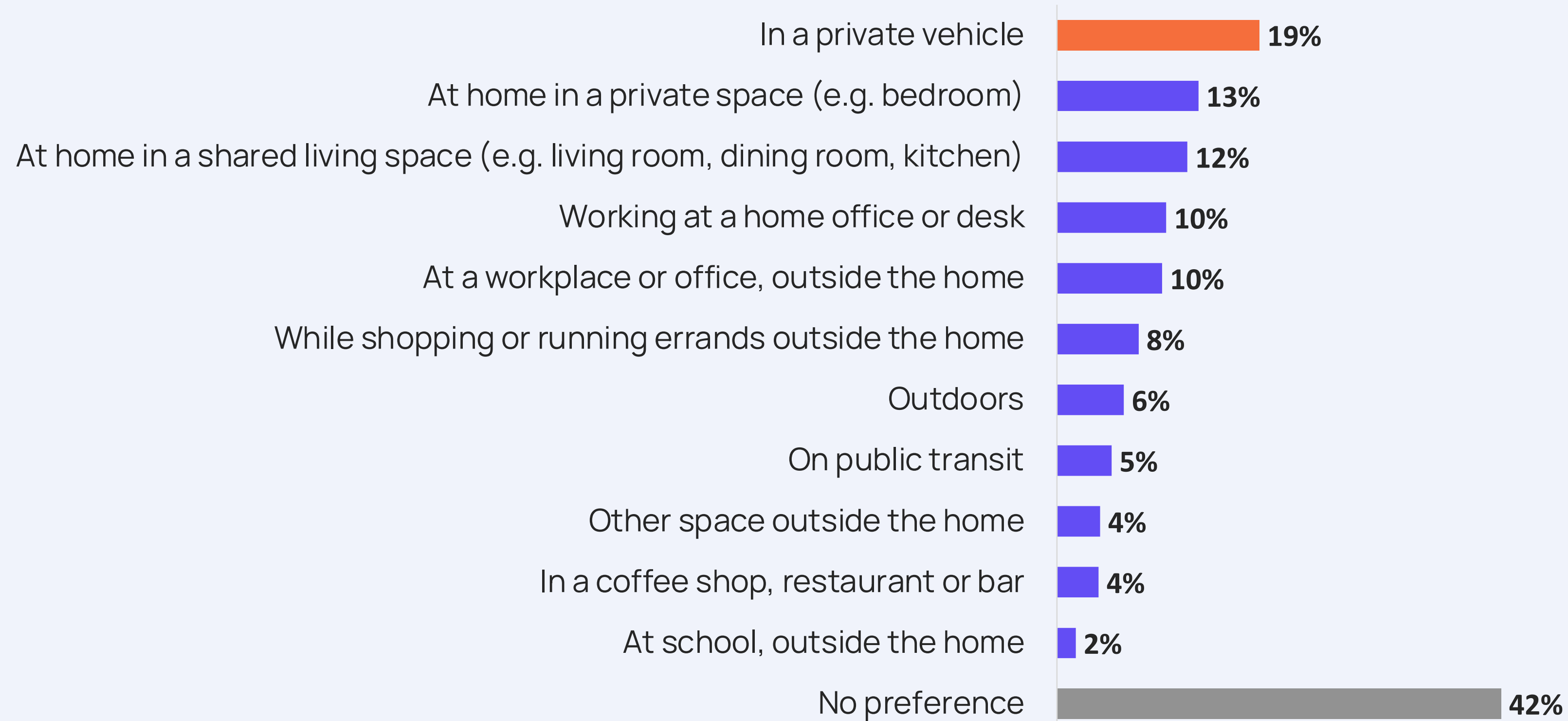
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In what location(s) do you prefer to listen on audio?

Listened audio/locations listened audio specified



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The **Video Podcast** Choice is Clearly Defined

Podcast consumers choose video in locations and contexts where they can lean forward, not lean back

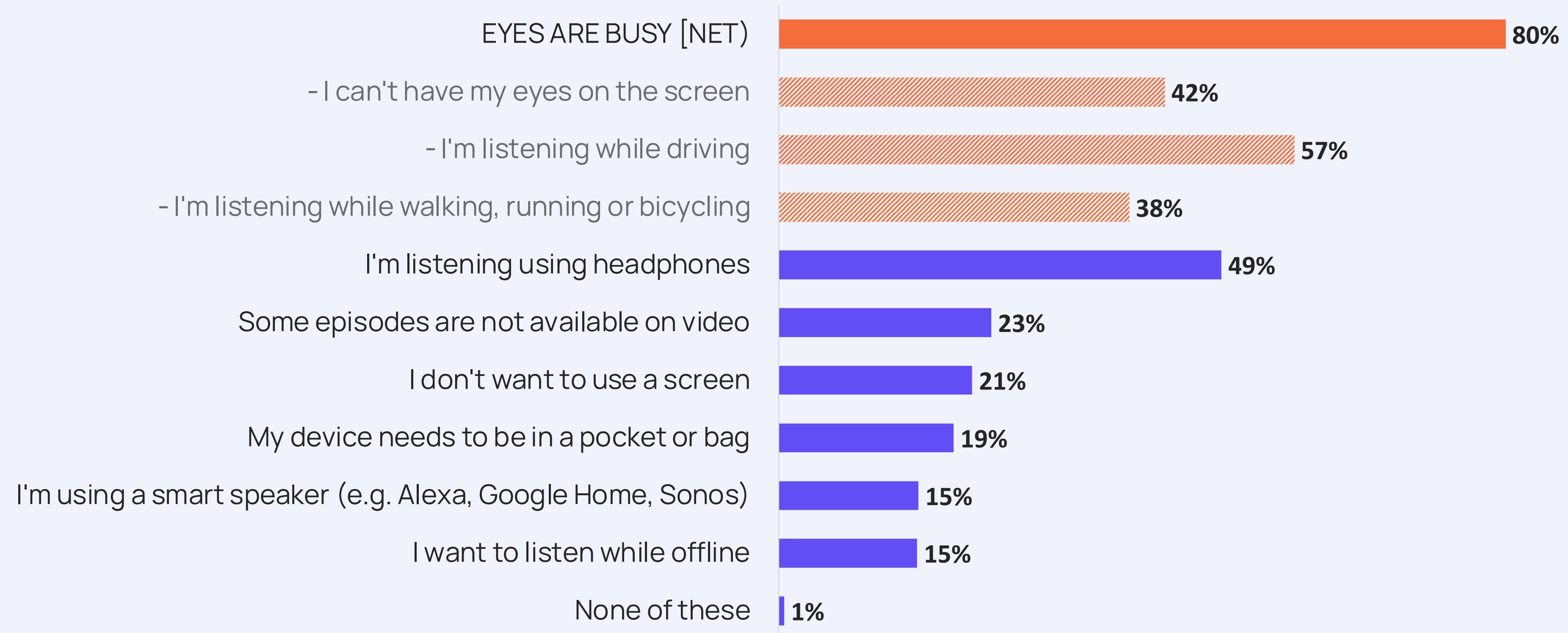
These same consumers will switch to audio - even for the same podcasts - when driving or otherwise occupied

Audio is for multi-tasking, while Video aids in focus and attention, and even factors into host engagement



Why do you listen to these podcasts on audio

Listen to audio of video podcasts



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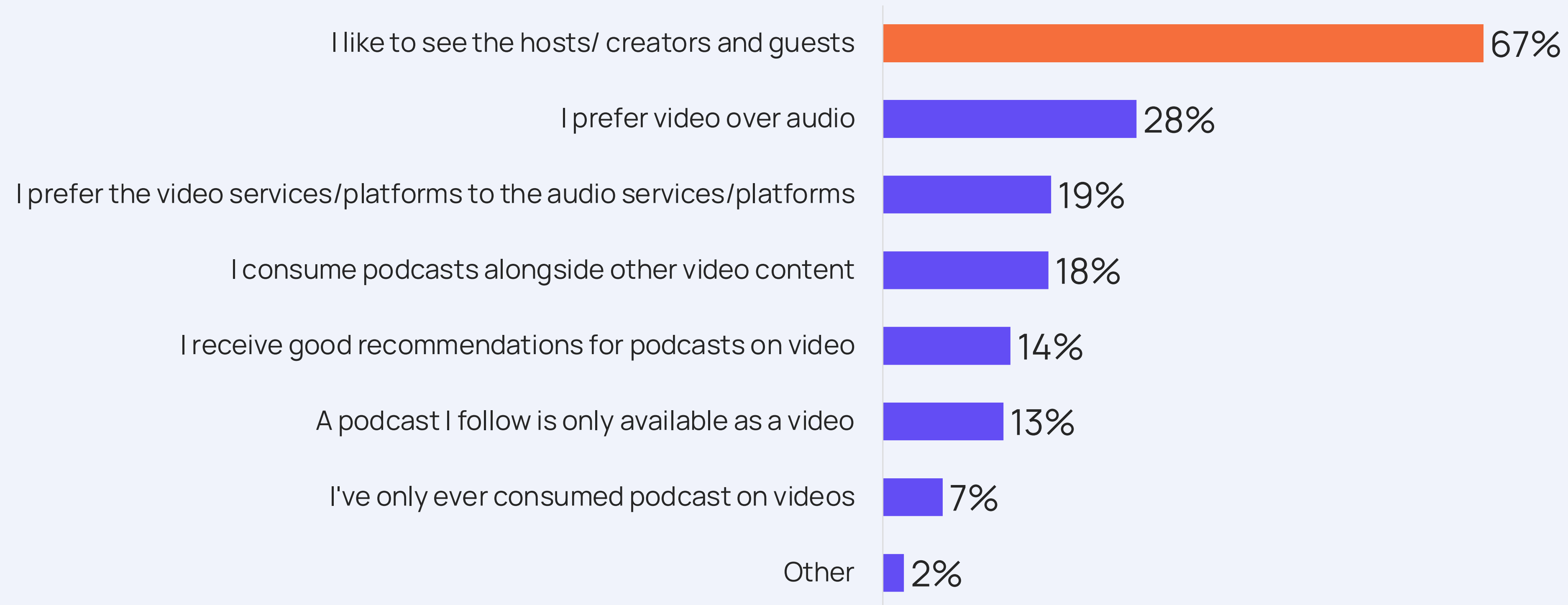
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Why do you watch podcasts on video?

Watched video podcast in last 30 days



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YouTube



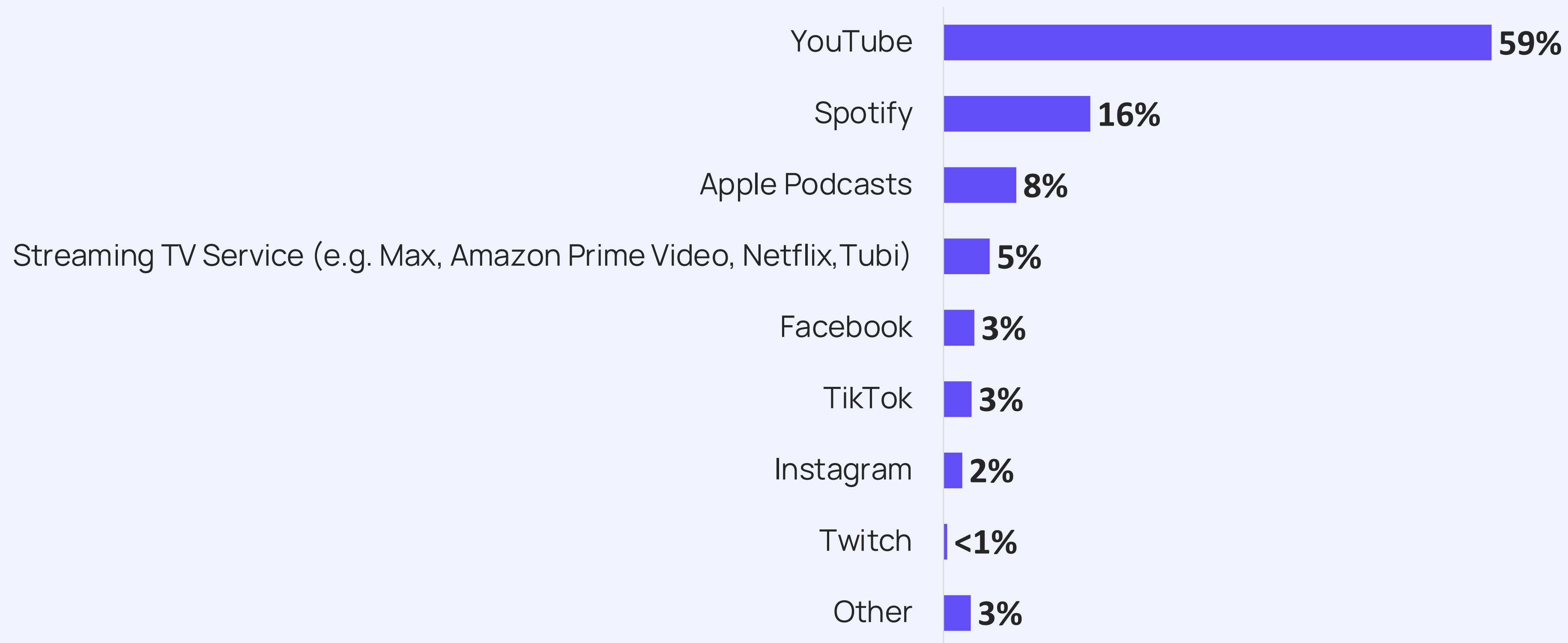
The **Video Podcast** Choice is Clearly Defined

YouTube is the dominant video podcast consumption platform and often is the place where people discover their shows



Where do you primarily watch your favorite podcast on video?

Watched video podcast in last 30 days



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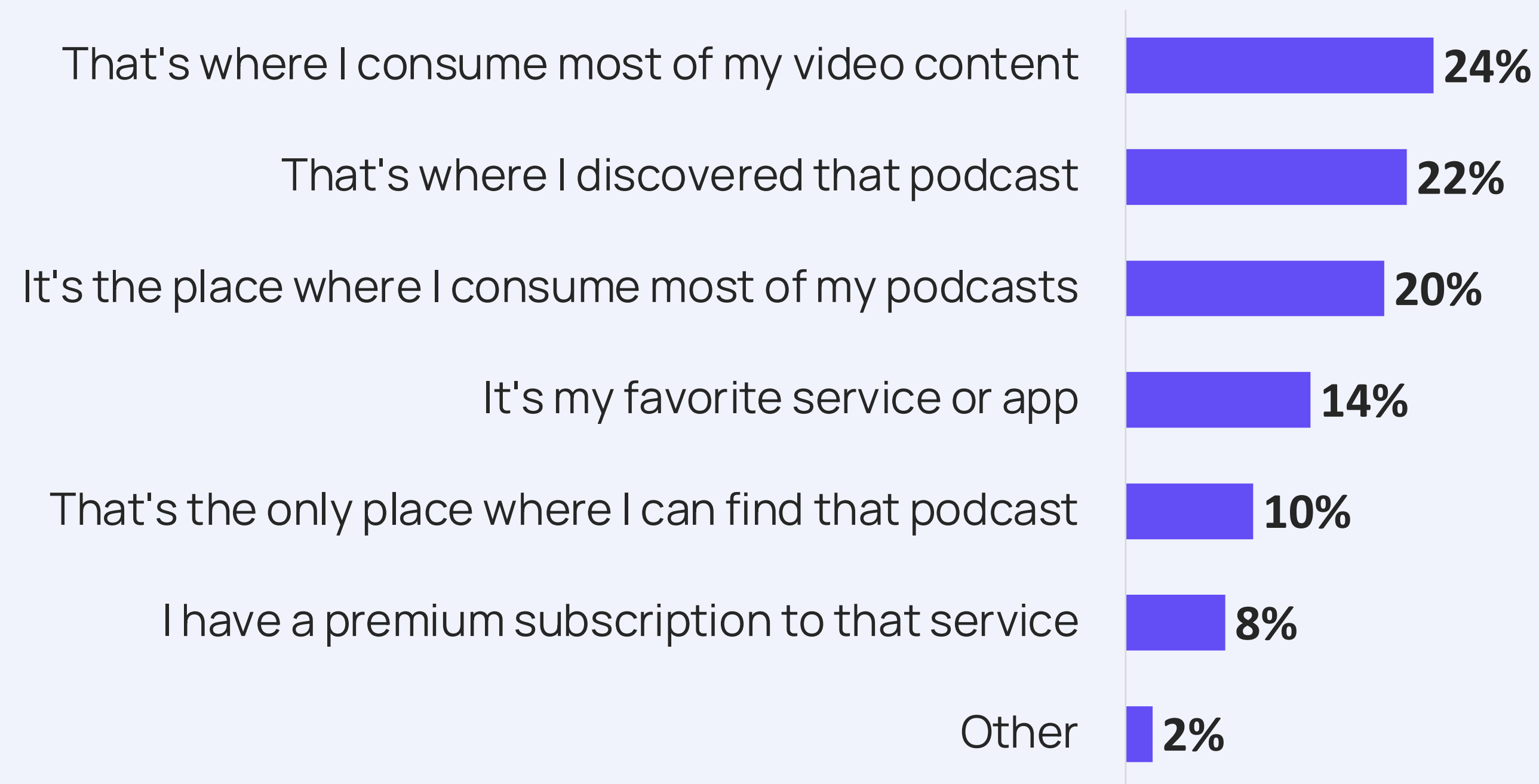
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What is the most important reason for watching your favorite podcast on your favorite podcast platform?

Watched video podcast in last 30 days



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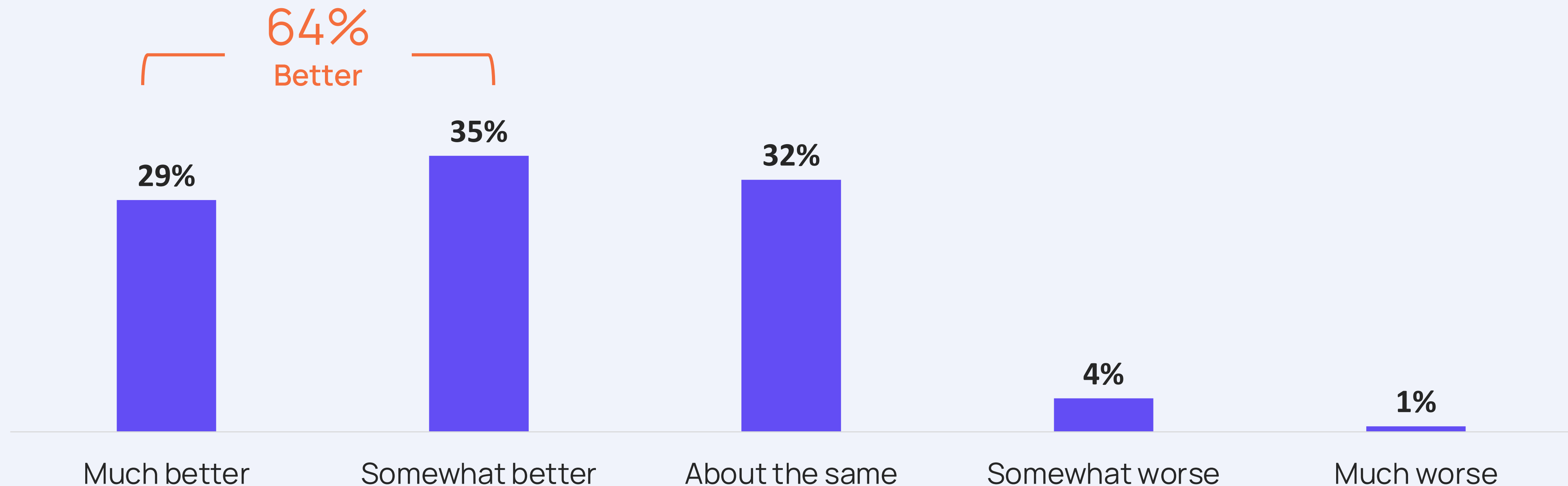
YouTube is the dominant video podcast consumption platform and often is the place where people discover their shows

YouTube as a podcast platform does offer some advantages over some audio clients, including ease and engagement



Overall, compared to listening to a podcast on an audio-only service (e.g. Apple Podcasts, iHeartRadio), is using YouTube a better or worse podcast experience?

Watched video podcast on YouTube in last 30 days



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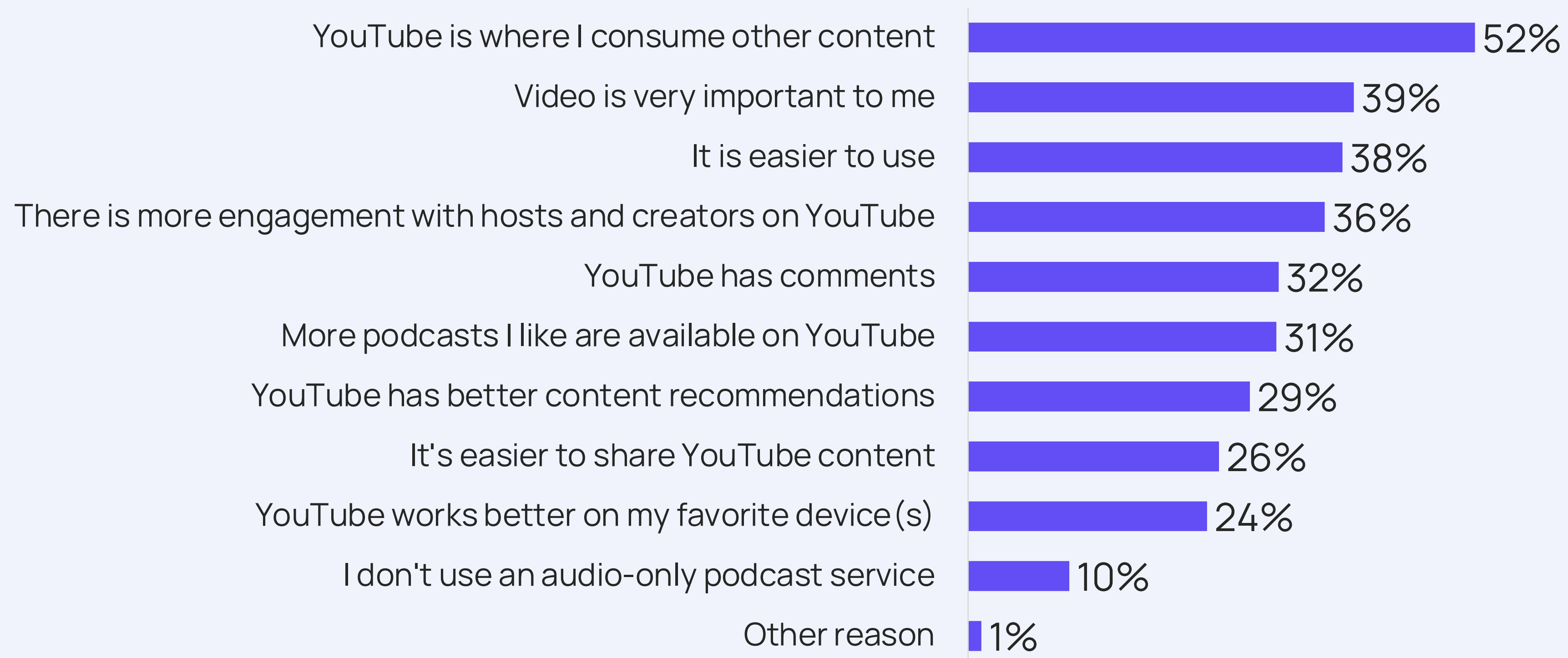
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Why is using YouTube for podcasts better than using an audio-only service?

Watched video podcast on YouTube in last 30 days, using YouTube is a better experience



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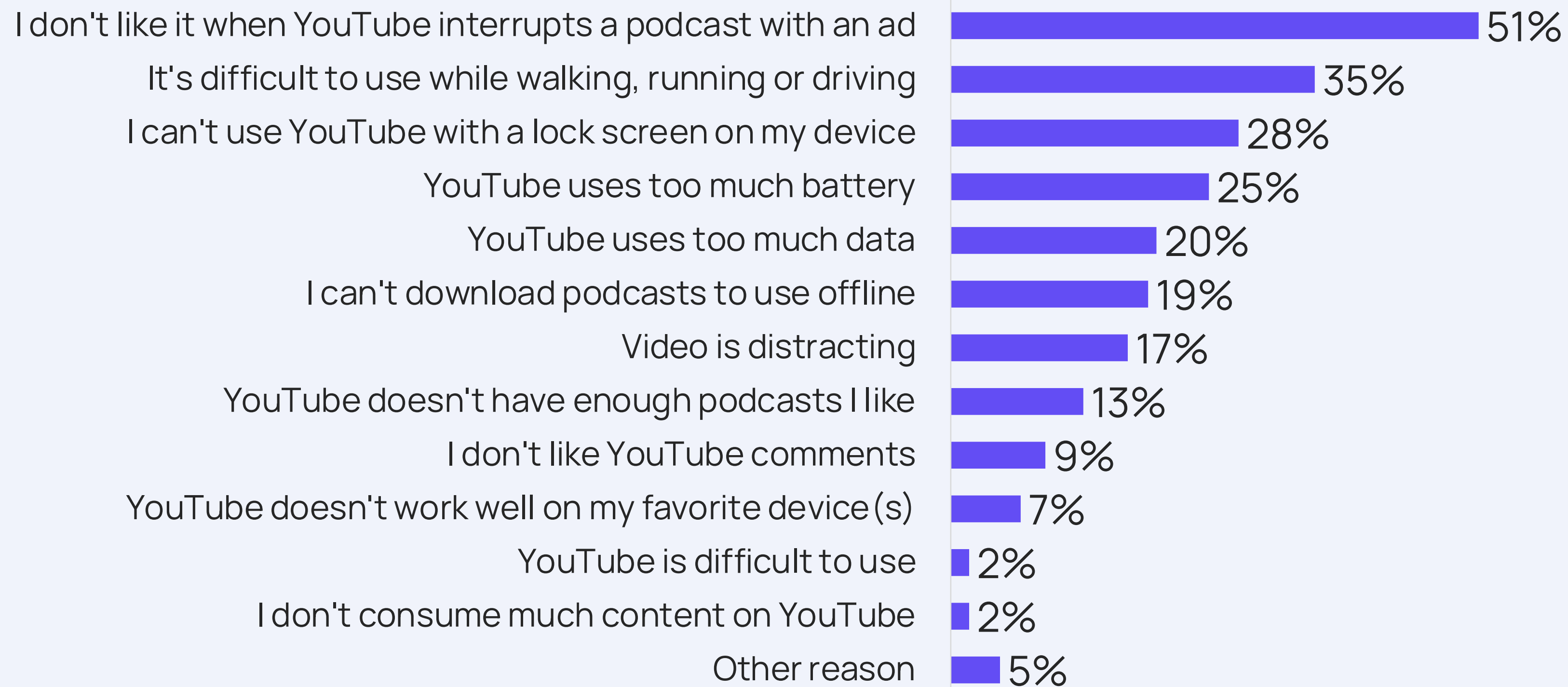
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Why is using YouTube for podcasts worse than using an audio-only service?

Watched video podcast on YouTube in last 30 days, using YouTube is a worse experience



Small sample size N=48

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The **Video Podcast** Choice is Clearly Defined

YouTube is the dominant video podcast consumption platform and often is the place where people discover their shows

YouTube as a podcast platform does offer some advantages over some audio clients, including ease and engagement

That said, inertia also plays a role, and users will migrate for their favorite shows



Why do you continue to use YouTube for podcasts?

Watched video podcast on YouTube in last 30 days, using YouTube is a worse experience



Small sample size N=48

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If your favorite podcast moved from your favorite platform to a different service that did not offer video, would you continue consuming it on the new service?

Watched video podcast in last 30 days



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Sound You Can See

YouTube Ads vs
Embedded Ads



The **Video Podcast** Choice is Clearly Defined

YouTube users have a very negative

- opinion about the standard ads inserted by the Youtube in their podcasts



Do you receive standard YouTube video ads, similar to the ads you see in other YouTube content, in the podcasts you consume on YouTube?

Watched video podcast on YouTube in last 30 days, does not subscribe to YouTube Premium



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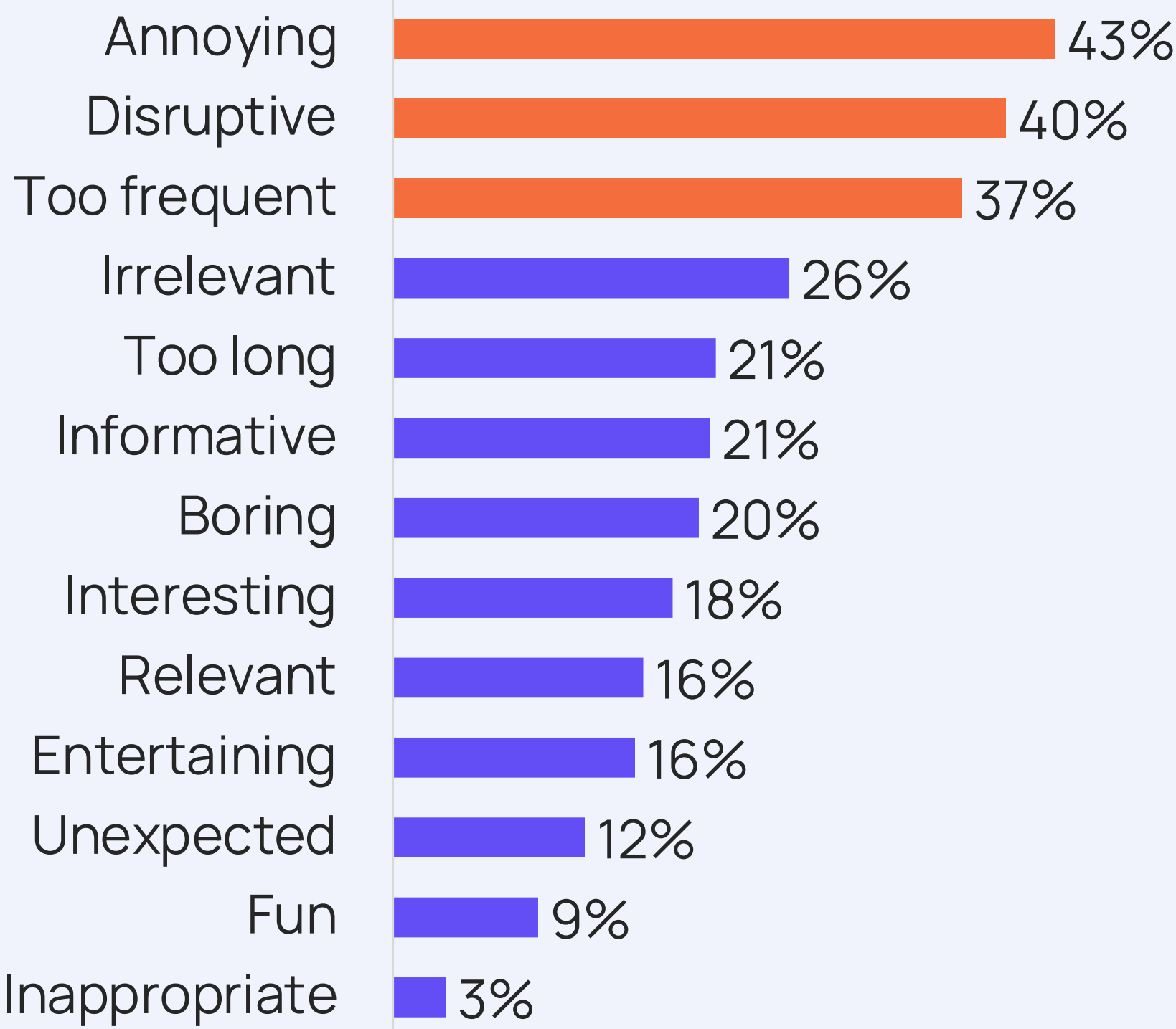
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How would you describe the regular YouTube ads you receive while consuming podcasts?

Watched video podcast on YouTube in last 30 days, does not subscribe to YouTube Premium, see YouTube native ads



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The **Video Podcast** Choice is Clearly Defined

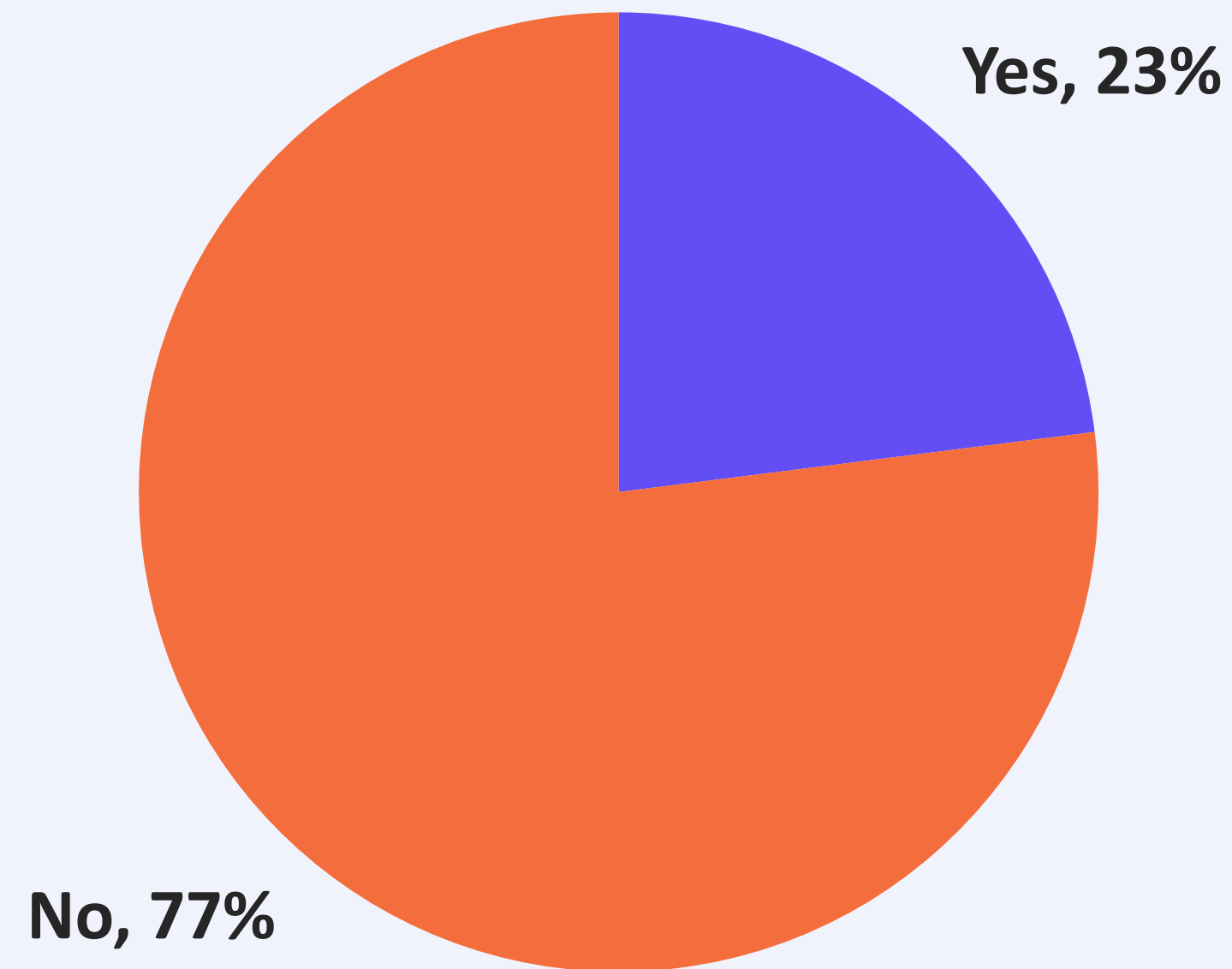
YouTube users have a very negative opinion about the standard ads inserted by the Youtube in their podcasts

A quarter of YouTube podcast listeners subscribe to YT Premium, specifically to avoid advertising interruptions



Do you subscribe to YouTube Premium, a paid subscription service that offers an ad-free experience and premium content?

Watched video podcast on YouTube in last 30 days



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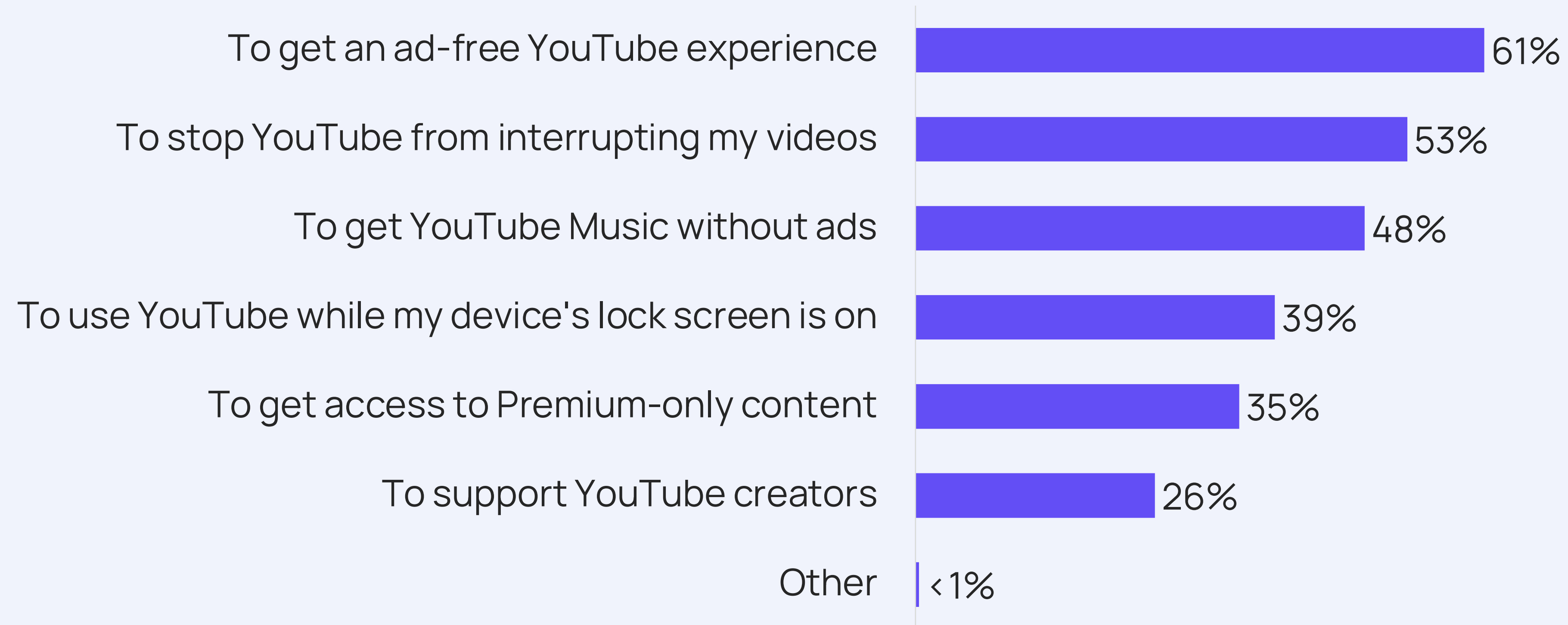
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Why do you subscribe to YouTube Premium?

Watched video podcast on YouTube in last 30 days, subscribe to YouTube Premium



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The **Video Podcast** Choice is Clearly Defined

YouTube users have a very negative opinion about the standard ads inserted by the Youtube in their podcasts

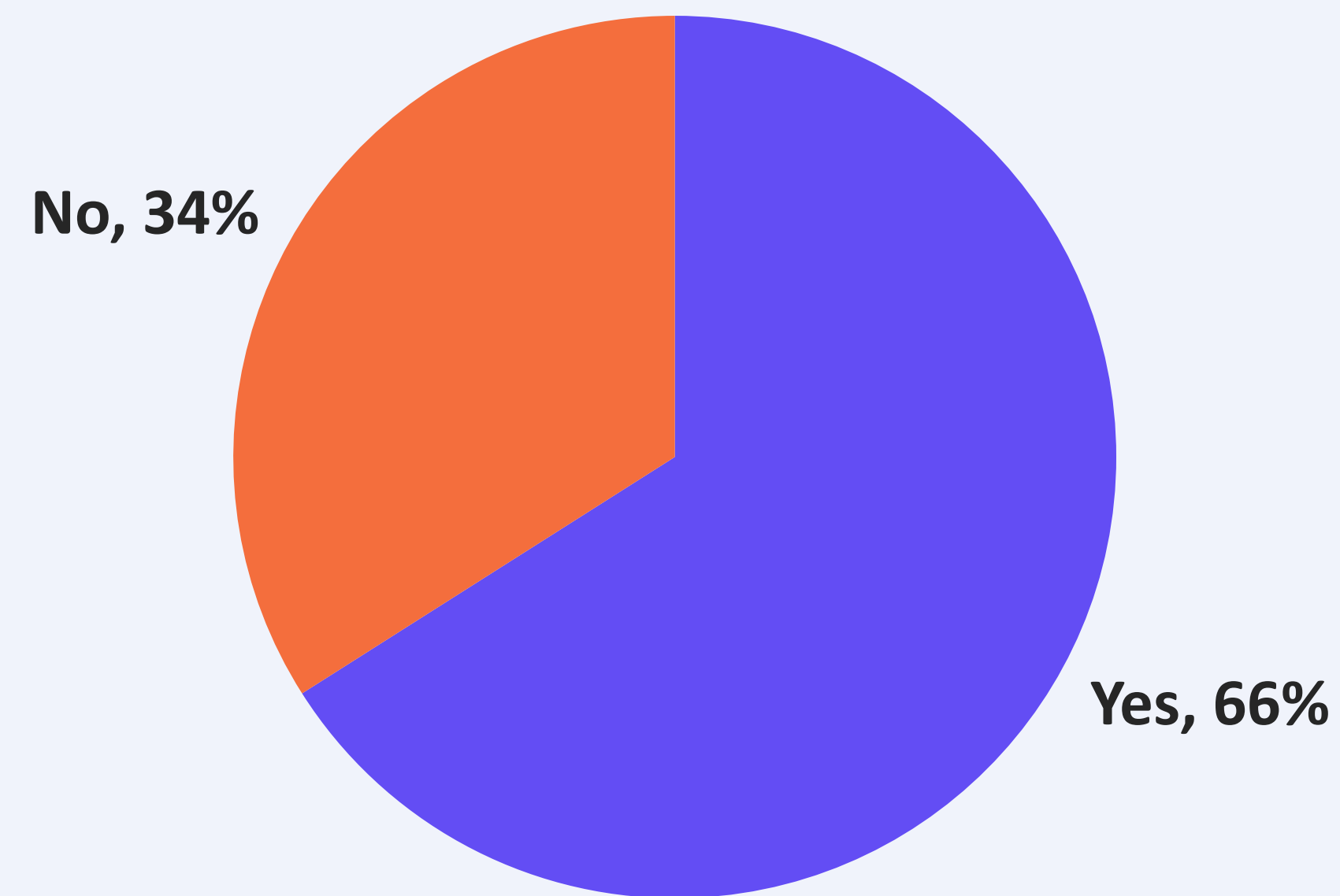
A quarter of YouTube podcast listeners subscribe to YT Premium, specifically to avoid advertising interruptions

However, embedded host-read ads are overwhelmingly perceived more positively – even with Premium subscribers



Thinking about podcast ads that are not inserted by YouTube but presented by the creator/host or someone else associated with the podcast and do not come with the standard 'skip' button. Do you get these ads on the podcasts you consume on YouTube?

Watched video podcast on YouTube in last 30 days, subscribe to YouTube Premium



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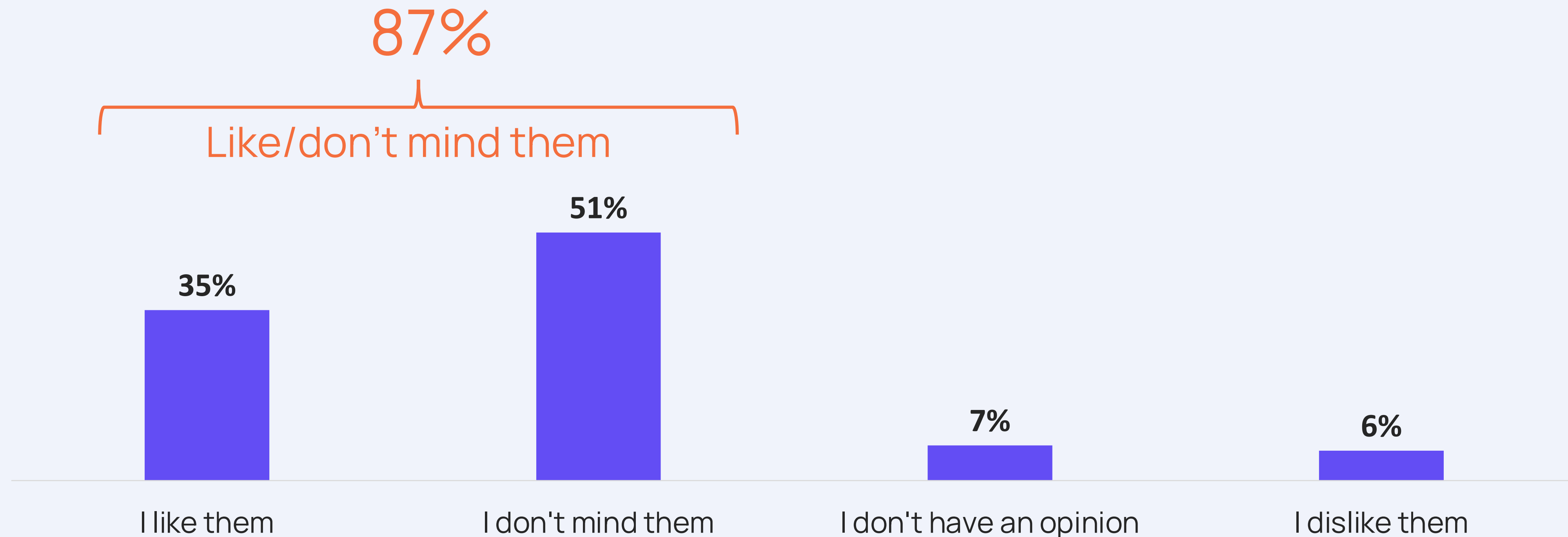
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What is your opinion of the ads read by creators/hosts on the podcasts you consume on YouTube Premium?

Watched video podcast on YouTube in last 30 days, have YouTube Premium, get host/creator/etc. ads



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Why do you feel that way about podcast ads on YouTube Premium?

Watched video podcast on YouTube in last 30 days, have YouTube Premium, like or don't mind host/creator ads



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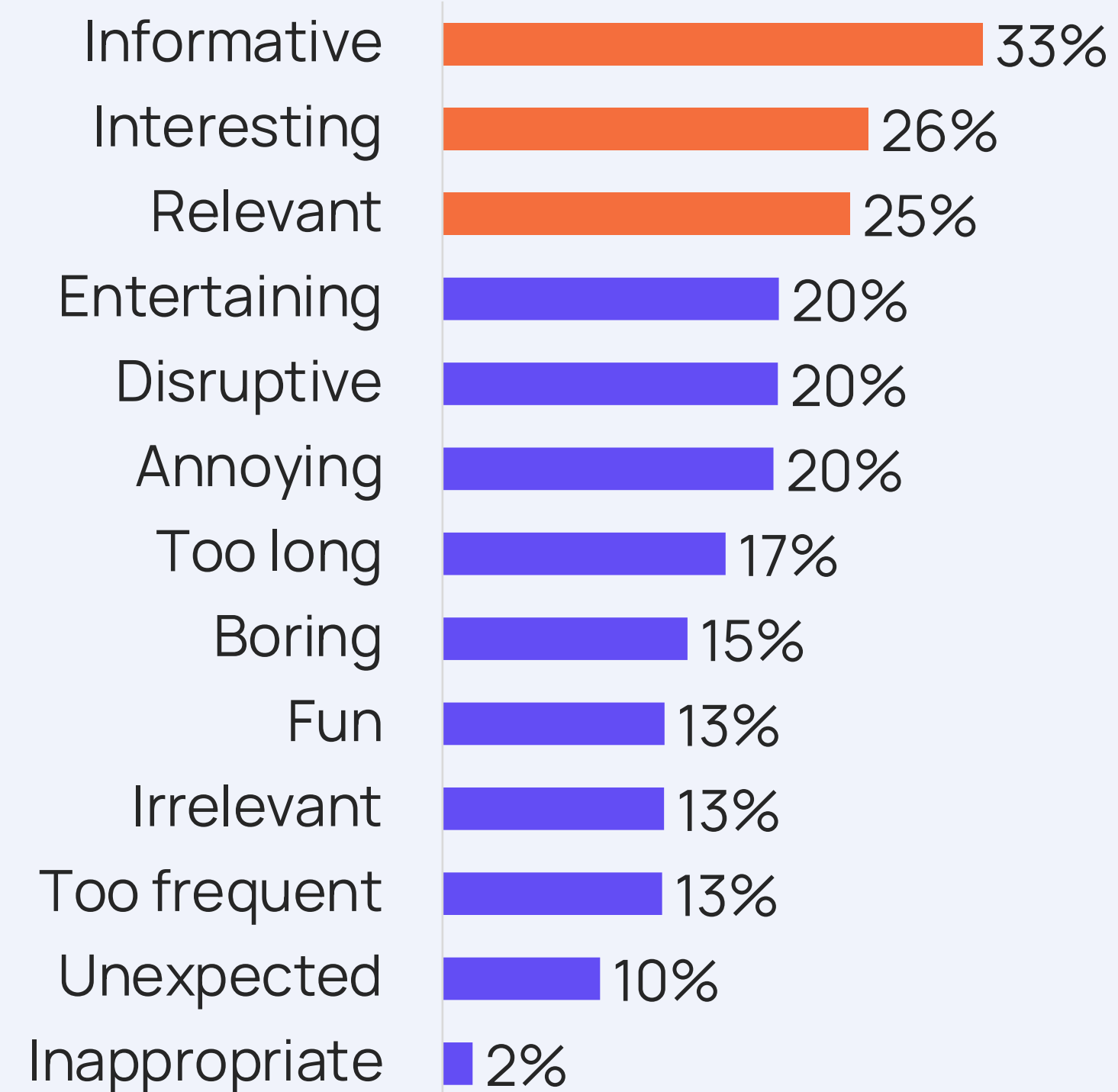
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How would you describe the type of ads read by creators/hosts on the podcasts you consume on YouTube?

Watched video podcast on YouTube in last 30 days, does not subscribe to YouTube Premium, get host/creator/etc. ads



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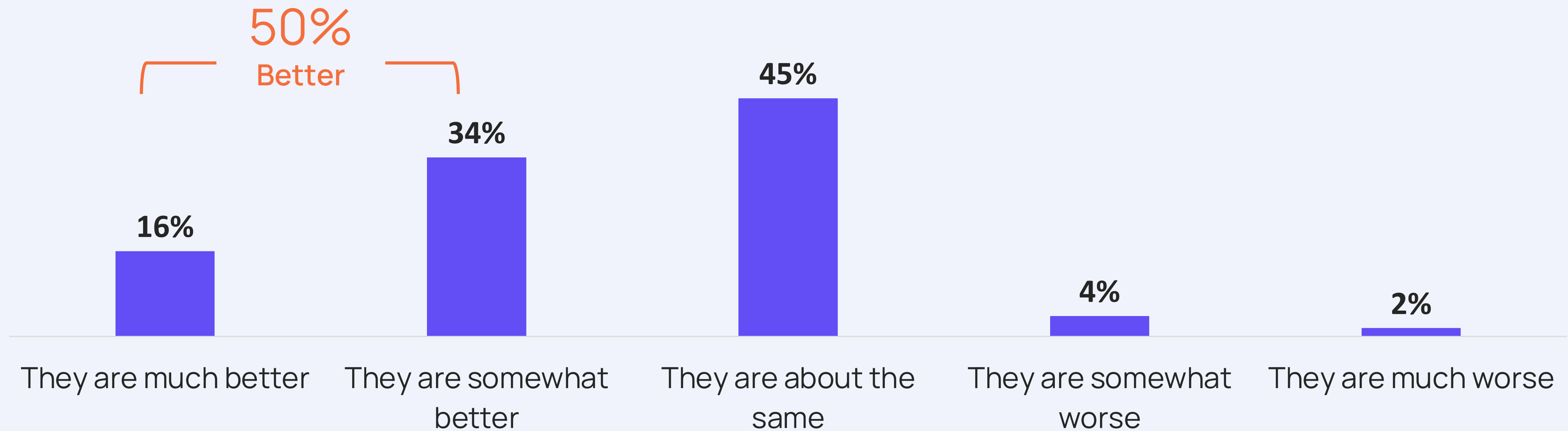
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Compared to standard YouTube video ads, what is your opinion of these creator/host podcast ads you receive on YouTube?

Watched video podcast on YouTube in last 30 days, does not subscribe to YouTube Premium, get host/creator/etc. ads



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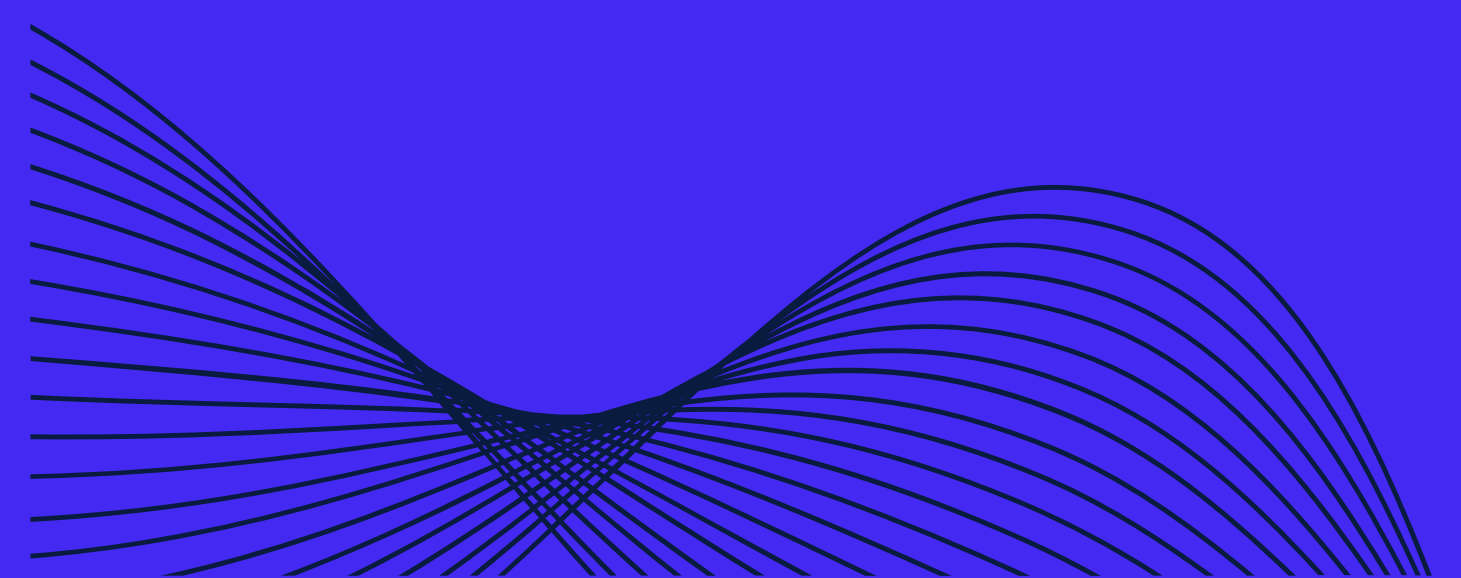
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Sound You Can See

Summary Findings



Sound You Can See - Findings

There aren't video consumers *or* audio consumers – the same people can choose either depending on content and context (even for the same show)

Those who consume video podcasts monthly are more likely to also convert to weekly than podcast listeners in general – choice plays a role

Most video consumers have come to the medium within the past five years, and gravitate to YouTube for video and Spotify for audio – Apple is further down the list, despite over-index of iPhone users

Sound You Can See - Findings

What makes a video a podcast? The name (of course), but also microphones in a studio (if you have that, there is no reason not to offer both audio and video)

Video podcast consumers overwhelmingly prefer conversations/interviews to other formats on video (and not scripted content)

Full episodes are somewhat preferred to clips, and clip watchers ALSO consume full episodes

Sound You Can See - Findings

Video consumers still spend just over half of their podcast consumption with audio podcasts

Consumers choose video in private, lean-forward settings (at home in their own space) and audio when they are on the go (especially in a vehicle, the top location for audio preference) and can't easily watch a screen

Seeing the host(s) improves engagement – consumers feel more connected to hosts they can see and follow along with – and helps some to follow conversations better

Sound You Can See - Findings

YouTube is perceived as a better experience for podcast consumption than audio-only players by those who watch their favorite podcast there

YouTube podcast consumers are highly receptive to embedded podcast ads – but view YouTube ads as intrusive and annoying

In fact, YouTube podcast consumers HATE YouTube ads – and $\frac{3}{4}$ don't subscribe to YouTube Premium

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Podcasting's Video Dilemma

DECEMBER 2023



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