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# Sound You Can See

Podcasting's Video Dilemma

December 2023



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### Podcasting's Video Dilemma

DECEMBER 2023



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### Methodology:

- in the last 30 days
- Americans 18+ conducted in the Summer of 2023
- advertising receptivity and other media-related behaviors

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

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

Respondents were asked a variety of questions about video and audio podcast consumption, including content, context, and location preferences for both, as well as

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The Dilemma:

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



### Q3 | 2023

# **TOP 50** IIIIIIIIII

SHOWS WITH THE LARGEST WEEKLY AUDIENCE

### TITLE

- The Joe Rogan Experience
- Crime Junkie
- The Daily
- This American Life
- This Past Weekend w/Theo Von



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5



### PRODUCER

Joe Rogan

audiochuck

The New York Times

This American Life

Theo Von











### Top 3 favorite podcasts on video?

- The Joe Rogan Experience
- New Heights with Jason and Travis Kelce
  - Crime Junkie
  - Call Her Daddy
    - Bad Friends
  - The Ben Shapiro Show
    - The Breakfast Club
  - This Past Weekend w/ Theo Von
    - Drink Champs
      - The Daily







Watched video podcast in last 30 days













### Do you watch the Joe Rogan Experience on video?

Watched video podcast in last 30 days

No, 53%



















### 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













### 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















### 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













### Where do you watch the Joe Rogan Experience on video?

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

YouTube

Spotify

TikTok

Facebook

Instagram

None of these



















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# Sound You Can See

### Who Watches Podcasts?



### Video Podcast Consumers are <u>Audio</u> 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

Podcasts

- Online Video (e.g. YouTube, Twitch, TikTok etc.)
  - Premium TV Streaming Services no ads
    - AM/FM Broadcast or Streaming Radio
    - Free TV Streaming Services with ads
      - Free Streaming Music with ads
        - Paid Streaming Music no ads
        - Network or Cable TV with ads

Audio Books





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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

No, 14%

























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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













### 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

No, 40%





















### Video Podcast Consumers are <u>Audio</u> 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

YouTube

Spotify

Streaming TV Service (e.g. Max, Amazon Prime Video, Netflix, Tubi)

Facebook

Instagram

TikTok

Apple Podcasts

Twitch

















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

Watched video podcast in last 30 days

YouTube

Spotify

Apple Podcasts

Streaming TV Service (e.g. Max, Amazon Prime Video, Netflix, Tubi)

TikTok

Facebook

Instagram

Twitch















### 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

Spotify

- YouTube Music
- Apple Podcasts
- Amazon Music
  - iHeartRadio
    - Pandora
    - Audible
    - Audacy
  - Pocketcasts

















### 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

Spotify

Apple Podcasts

YouTube Music

Amazon Music

iHeartRadio

Pandora

Audible

Pocketcasts

Audacy















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

Watched video podcast in last 30 days

Apple iPhone

Android smartphone

Desktop or laptop computer

Smart TV

iPad

In-car Bluetooth

Smart speaker (Alexa, Google Home, Sonos, etc.)

Android tablet **2%** 

In-car multimedia (Android Auto, Apple CarPlay, etc.) **2%** 

Other **1%** 

















### Video Podcast Consumers are <u>Audio</u> 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









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### What was the first service or platform you used?

Watched video podcast in last 30 days

- YouTube
- Spotify
- Apple Podcasts
  - Facebook
  - iHeartRadio
    - Pandora 3%
    - Audible **2%**
    - Instagram **2%**
- Amazon Music **1%** 
  - Stitcher 1%
  - TikTok **1%**
  - Pocketcasts 1%
    - Audacy <1%
    - Twitch |<1%
- Don't remember

**ESFI** Podcasts

















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# Sound You Can See

### 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?

- The word 'podcast' is in its title or name
  - SEE MIKES/ A STUDIO (NET)
- The creators, hosts or guests are using visible microphones
  - It appears to take place in a studio
  - The creator or host is known for podcasting
  - It's also available on audio services (e.g. Apple Podcasts)
    - I found it in the Podcasts tab on YouTube
      - It's an interview
      - It's an opinion show
      - It's also a radio show
      - It's a video call (e.g. Zoom, Facetime)
      - The word 'radio' is in its title or name
        - Other







Watched video podcast in last 30 days









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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

Hosts/ creators and/ or guests together in a studio

Hosts/ creators and/ or guests connected in a video call (e.g. Zoom, Facetime)

Live-action video without video of hosts/ creators or guests

A static image or thumbnail for the entire length of the podcast

Animation or graphics, without video of hosts/ creators or guests

Video game graphics

None of these















### 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

Hosts/ creators and/ or guests together in a studio

Hosts/ creators and/ or guests connected in a video call (e.g. Zoom, Facetime)

Live-action video without video of hosts/ creators or guests

Animation or graphics, without video of hosts/ creators or guests

A static image or thumbnail for the entire length of the podcast

Video game graphics



	70%
22%	
14%	
8%	
7%	
4%	















### 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

- Comedy
- Sports
- News
- Music
- True Crime
- Society & Culture
- Health & Fitness
  - History
  - TV & Film
  - Business
  - Government
  - Technology
    - Science
- Religion & Spirituality
  - Arts
  - Leisure
  - Fiction
  - Kids & Family
  - None of these 1%

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### What categories of podcasts do you consume?

Watched video podcast in last 30 days



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<b>.S. Top Podcast Genres</b> ober 2022 - March 2023, Weekly Podcast Listeners age 13+	
1	Comedy
2	News
3	Society & Culture
4	True Crime
5	Sports
6	Business
7	Education
8	Health & Fitness
9	TV & Film
10	<b>Religion &amp; Spirituality</b>
11	Arts
12	History
13	Music
14	Science
15	Leisure
16	Technology
17	Fiction
18	Kids & Family
19	Government



How The Study Was Conducted: Edison Podcast Metric Edison Research, Wondery, and ART19.











### What categories of podcasts do you consume most often?

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

Comedy

Sports

True Crime

News

Society & Culture

Religion & Spirituality

Business

Health & Fitness

Music

TV & Film **3%** 

Government 3%

Technology 2%

Leisure **2%** 

Science 2%

Kids & Family **1%** 

Fiction 1%


















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?

CONVERSATIONS/ INTERVIEWS (NET)

-Interviews

- Conversations between hosts/ creators

Host or creator monologues, speaking to the camera

Short clips/highlights from a longer show/ podcast, less than 15 minutes

News reports

Comedy skits or improv comedy

Product reviews

Dramas

Video game play-throughs

Fiction

Podcast trailers

None of these **2%** 



Watched video podcast in last 30 days













#### 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

Conversations between hosts/ creators

Interviews

Host or creator monologues, speaking to the camera

News reports

Short clips/highlights from a longer show/podcast, less than 15 minutes

Comedy skits or improv comedy

**Product reviews** 

Video game play-throughs

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Dramas

Fiction

Podcast trailers



















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#### Why Video?



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





#### In what locations do you <u>watch podcasts on video</u>?

- At home in a private space (e.g. bedroom)
- At home in a shared living space (e.g. living room, dining room, kitchen)

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- Working at a home office or desk
  - In a private vehicle
- At a workplace or office, outside the home
  - Outdoors
- While shopping or running errands outside the home
  - In a coffee shop, restaurant or bar
    - On public transit
    - Other space outside the home
      - At school, outside the home
        - None of these





Watched video podcast in last 30 days













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

- At home in a private space (e.g. bedroom)
- At home in a shared living space (e.g. living room, dining room, kitchen)
  - Working at a home office or desk
  - At a workplace or office, outside the home
    - In a private vehicle
    - Other space outside the home **1%**
  - While shopping or running errands outside the home **1%** 
    - Outdoors 1%
    - In a coffee shop, restaurant or bar **1%** 
      - On public transit
      - At school, outside the home

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Location watch podcasts on video specified













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

- At home in a private space (e.g. bedroom)
- At home in a shared living space (e.g. living room, dining room, kitchen)

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- Working at a home office or desk
- At a workplace or office, outside the home **2%** 
  - Outdoors **2%**
  - In a coffee shop, restaurant or bar **2%** 
    - In a private vehicle **2%**
    - Other space outside the home **1%** 
      - On public transit **1%**
      - At school, outside the home
- While shopping or running errands outside the home
  - No preference







Watched video/locations watched video specified













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 <u>listen to podcasts on audio</u>?

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

- At home in a private space (e.g. bedroom)
  - In a private vehicle
- At home in a shared living space (e.g. living room, dining room, kitchen)

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- Working at a home office or desk
  - Outdoors
- While shopping or running errands outside the home
  - At a workplace or office, outside the home
    - Other space outside the home
      - On public transit
    - In a coffee shop, restaurant or bar
      - At school, outside the home
        - None of these 1%



















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

#### Location listened audio specified

- At home in a private space (e.g. bedroom)
  - In a private vehicle
- At home in a shared living space (e.g. living room, dining room, kitchen)
  - Working at a home office or desk
  - At a workplace or office, outside the home
    - Outdoors
  - While shopping or running errands outside the home
    - On public transit
    - Other space outside the home
    - In a coffee shop, restaurant or bar **1%** 
      - At school, outside the home

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

- In a private vehicle
- At home in a private space (e.g. bedroom)
- At home in a shared living space (e.g. living room, dining room, kitchen)

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- Working at a home office or desk
- At a workplace or office, outside the home
- While shopping or running errands outside the home
  - Outdoors
  - On public transit
  - Other space outside the home
  - In a coffee shop, restaurant or bar
    - At school, outside the home
      - No preference





Listened audio/locations listened audio specified













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

#### EYES ARE BUSY [NET)

- I can't have my eyes on the screen
  - I'm listening while driving
- I'm listening while walking, running or bicycling
  - I'm listening using headphones
  - Some episodes are not available on video
    - I don't want to use a screen
  - My device needs to be in a pocket or bag
- I'm using a smart speaker (e.g. Alexa, Google Home, Sonos)
  - I want to listen while offline
    - None of these



Listen to audio of video podcasts













#### Why do you watch podcasts on video?

Watched video podcast in last 30 days

I like to see the hosts/ creators and guests

I prefer video over audio

I prefer the video services/platforms to the audio services/platforms

I consume podcasts alongside other video content

I receive good recommendations for podcasts on video

A podcast I follow is only available as a video

I've only ever consumed podcast on videos

Other















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#### YouTube



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?

- - YouTube
  - Spotify
  - Apple Podcasts
- Streaming TV Service (e.g. Max, Amazon Prime Video, Netflix, Tubi)
  - Facebook
  - Instagram **2%** 
    - Twitch
    - Other



Watched video podcast in last 30 days













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

Watched video podcast in last 30 days

That's where I consume most of my video content

That's where I discovered that podcast

It's the place where I consume most of my podcasts

It's my favorite service or app

That's the only place where I can find that podcast

I have a premium subscription to that service

Other















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 audioonly service (e.g. Apple Podcasts, iHeartRadio), is using YouTube a better or worse podcast experience?





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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

YouTube is where I consume other content

- Video is very important to me
  - It is easier to use
- There is more engagement with hosts and creators on YouTube

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- YouTube has comments
- More podcasts I like are available on YouTube
- YouTube has better content recommendations
  - It's easier to share YouTube content
- YouTube works better on my favorite device(s)
  - I don't use an audio-only podcast service
    - Other reason

















#### 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

- I don't like it when YouTube interrupts a podcast with an ad
  - It's difficult to use while walking, running or driving
  - I can't use YouTube with a lock screen on my device
    - YouTube uses too much battery
      - YouTube uses too much data
    - I can't download podcasts to use offline
      - Video is distracting
    - YouTube doesn't have enough podcasts l like
      - I don't like YouTube comments
  - YouTube doesn't work well on my favorite device (s)
    - YouTube is difficult to use 2%

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- I don't consume much content on YouTube
  - Other reason















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

- YouTube is free
- I consume other content on YouTube
- YouTube offers good content recommendations
- I like seeing video for the podcasts I watch on YouTube
  - YouTube has comments
- One or more of my YouTube podcasts are not available elsewhere
  - I watch podcasts made by creators who make other YouTube...
    - I have favorite podcasts on YouTube
  - There is more engagement with hosts and creators on YouTube
    - It's easier to share YouTube content
      - Other reason













#### 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

No, 18%























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#### YouTube Ads vs Embedded Ads



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

























#### 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

- Annoying
- Disruptive
- Too frequent
  - Irrelevant
  - Too long
  - Informative
    - Boring
  - Interesting
    - Relevant
- Entertaining
- Unexpected
  - Fun
- Inappropriate











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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





















## Why do you subscribe to YouTube Premium?

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

To get an ad-free YouTube experience

To stop YouTube from interrupting my videos

To get YouTube Music without ads

To use YouTube while my device's lock screen is on

To get access to Premium-only content

To support YouTube creators

Other















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

No, 34%









Yes, 66%













#### 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







#### 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

- The ads support my favorite hosts and creators
  - They are easy to skip
  - The ads don't bother me
  - The ads are informative
  - The ads offer good deals
- I like learning about new products and services
  - The ads are fun or entertaining
    - Other

















#### 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

- Informative
- Interesting
  - Relevant
- Entertaining
  - Disruptive
  - Annoying
  - Too long
    - Boring
      - Fun
  - Irrelevant
- Too frequent
- Unexpected
- Inappropriate

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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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Paramount

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#### Summary 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





studio (if you have that, there is no reason not to offer both audio and video)

formats on video (and not scripted content)

episodes

- What makes a video a podcast? The name (of course), but also microphones in a
- Video podcast consumers overwhelmingly prefer conversations/interviews to other
- Full episodes are somewhat preferred to clips, and clip watchers ALSO consume full





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





YouTube is perceived as a better experience for podcast consumption than audioonly 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 <sup>3</sup>/<sub>4</sub> don't subscribe to YouTube Premium





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