

April 2026

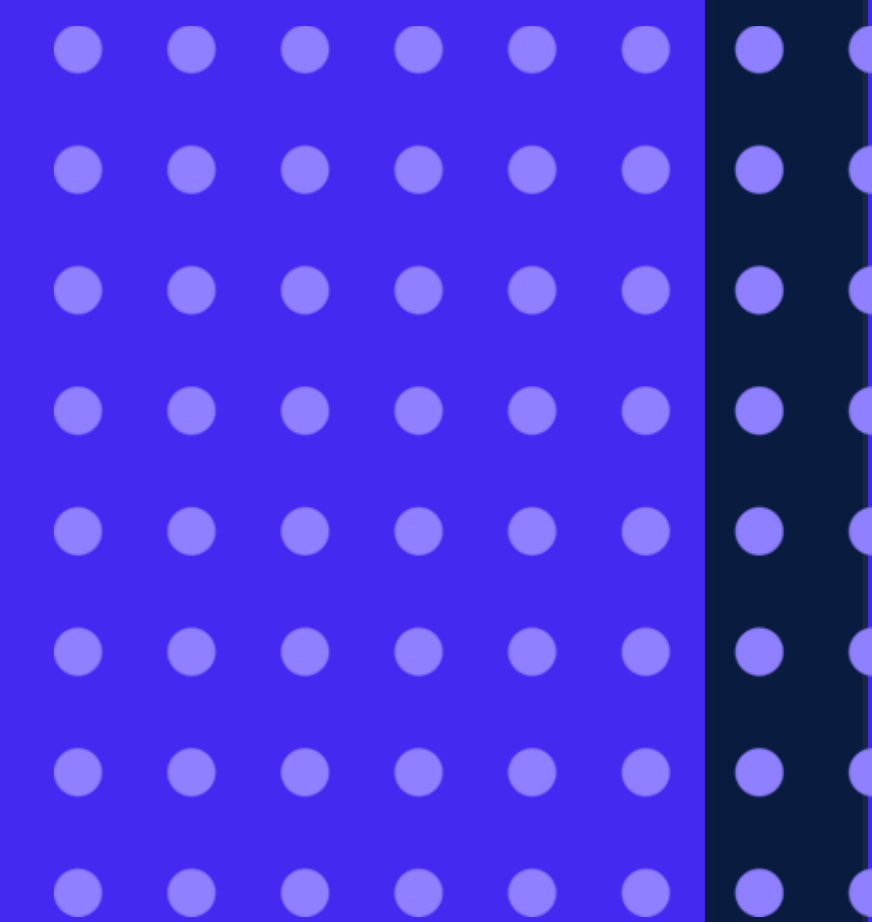
SOUNDS
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PROFITABLE



Audio Primes

The People Who *Listen*

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THE
BUSINESS
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PODCASTING

U.S. 2025

The Podcast Landscape



Methodology



In June 2025, Sounds Profitable partnered with **Signal Hill Insights** to field an online study of **5034** Americans ages 18+ - the largest public study of podcasting in America



The sample was weighted to the most recent census data to be representative of the US population, using a single source, conducted identically to the 2023 and 2024 studies



Respondents were asked a variety of questions about podcasting, including whether they consume, how often, and why they do or do not consume podcasts



Topics also included churn, what leads to decreases in consumption over time, and general perceptions of the medium and its creators

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Meet the Audio Primes:
Podcast consumers who
listen to at least 75% of
their content as audio.

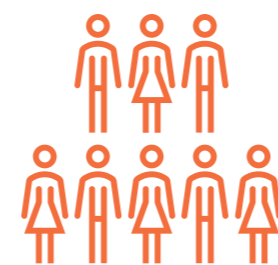
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Who They Are at a Glance



22% of podcast consumers listen to 75%+ of their podcasts



Younger, more educated, higher-earning



More engaged, loyal, likely to recommend



The word-of-mouth engine of podcasting

- This analysis is based on The Podcast Landscape 2025 survey conducted by Sounds Profitable (N = 5,000+ Americans 12+).
- All percentages are weighted unless otherwise noted. Multi-select questions may sum to more than 100%.

Who Are Audio Primes?

Demographic Profile



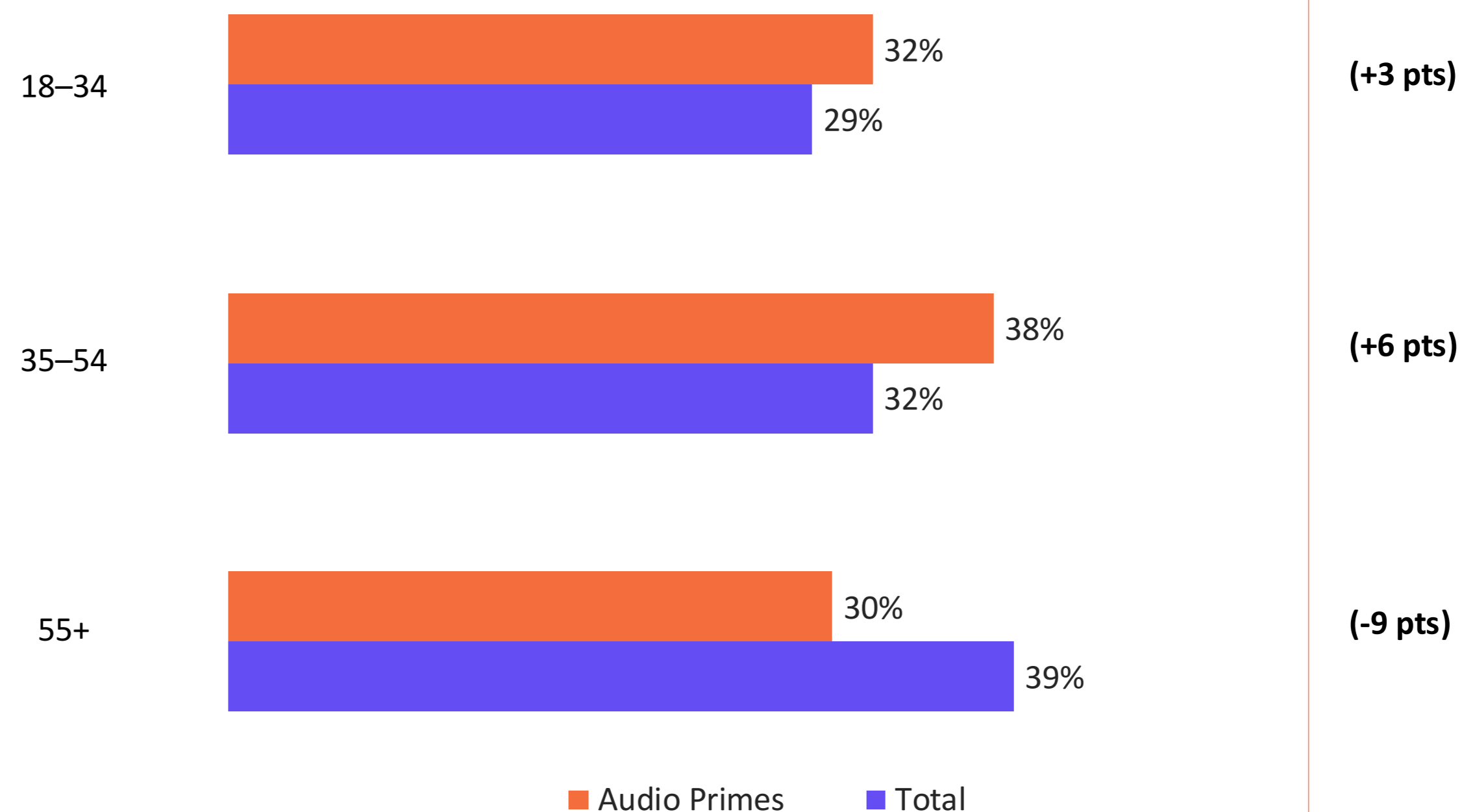
Audio Primes skew younger, not older. The 35–54 cohort over-indexes by 6 points, while 55+ under-indexes by 9.

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Audio Primes Are Younger Than You Think



The 55+ cohort, often assumed to be the audio-first base, under-indexes by 9 points. Audio Primes are younger consumers.

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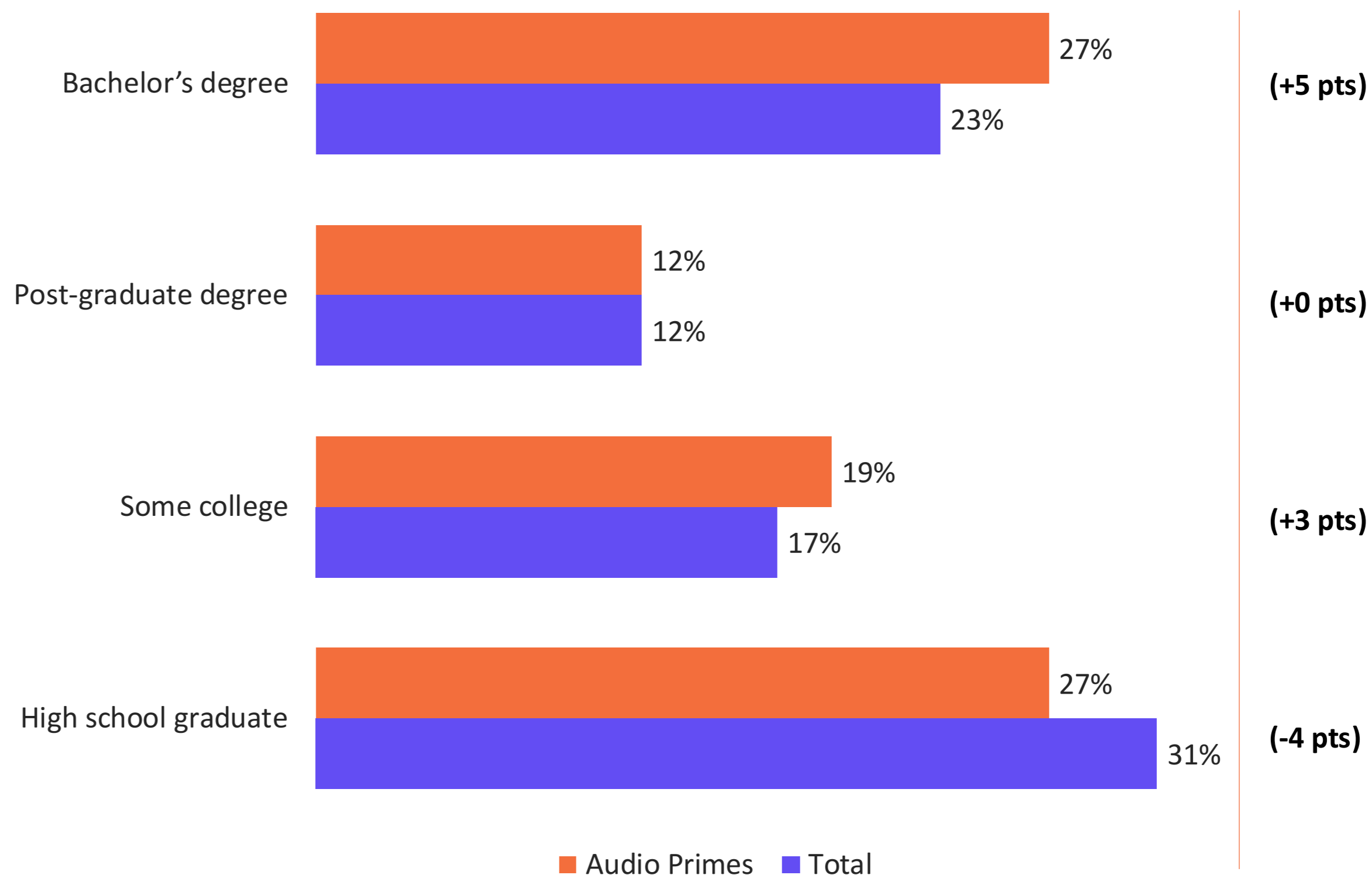
39% of Audio Primes hold a bachelor's degree or higher, over-indexing the total audience by 4 points.

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A More Educated Audience



Audio Primes are more likely to hold a college or post-graduate degree and less likely to have stopped at high school. This is an audience that reads, researches, and responds to substantive content.

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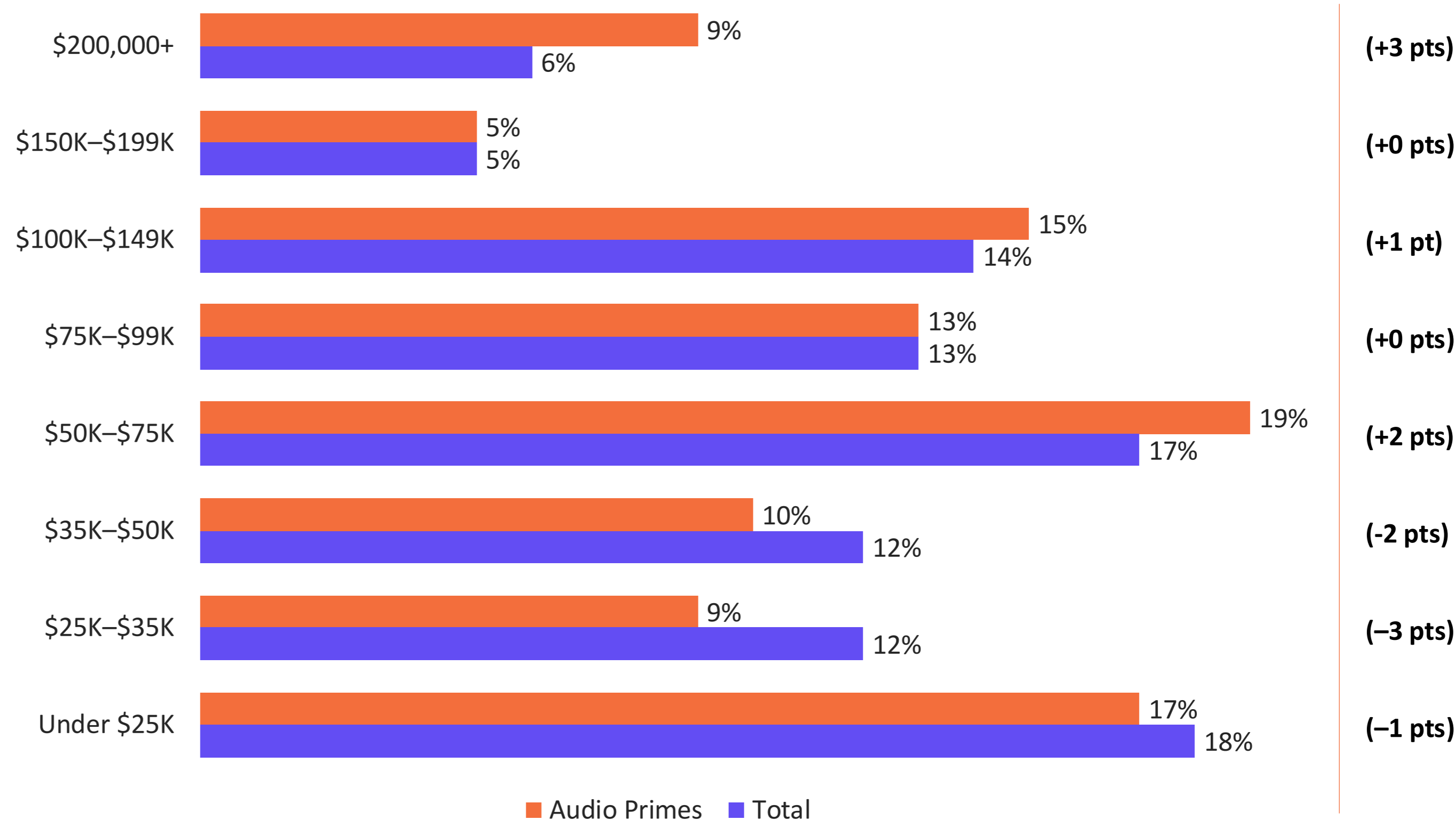
9% of Audio Primes earn \$200K+, over-indexing by 3 points. A premium demographic for advertisers.

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Higher-Earning Households



Audio Primes over-index at the top of the income scale and under-index at the bottom. This is an affluent, commercially attractive audience that rewards well-targeted advertising.

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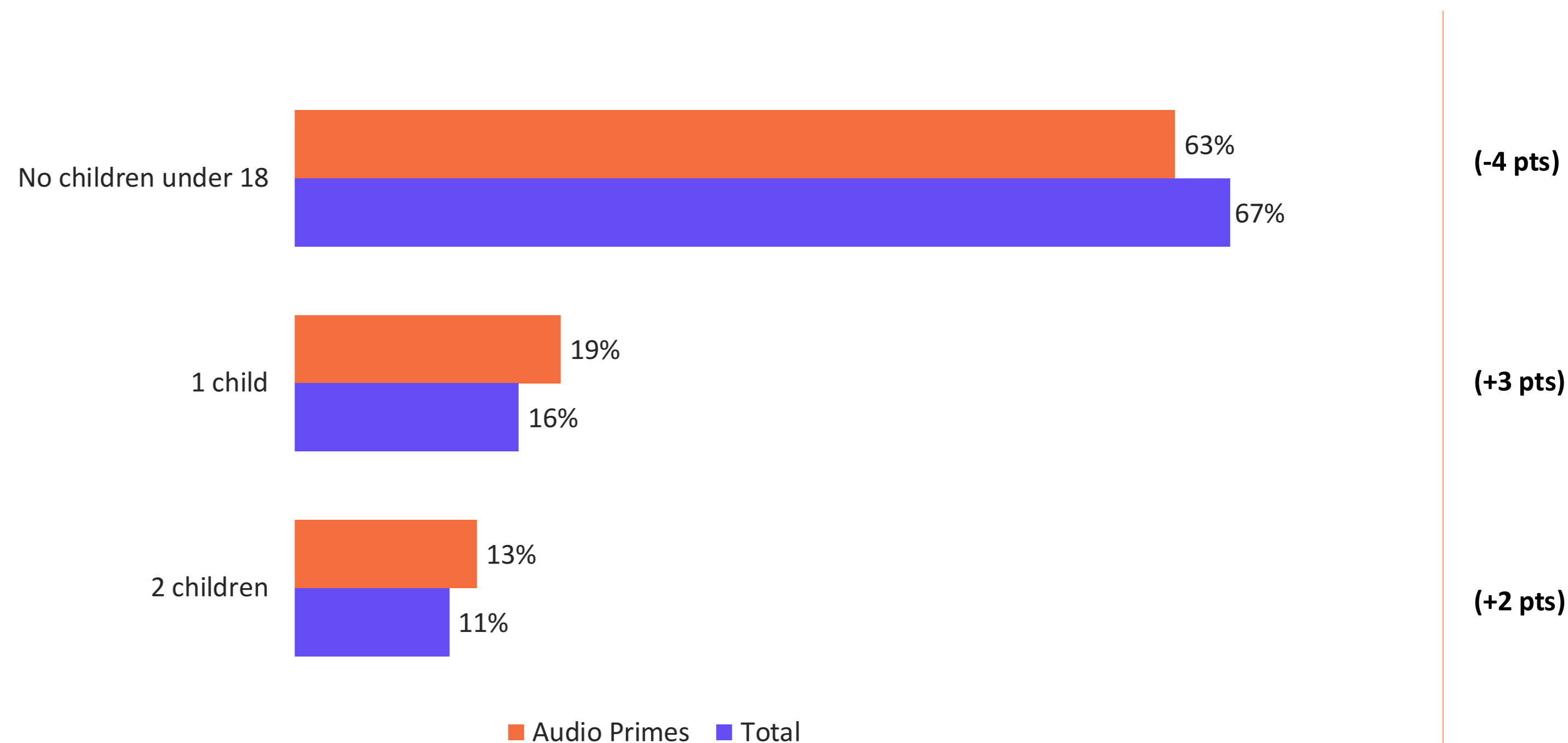
37% of Audio Primes have children under 18, outpacing the total audience by 4 points. For parents, audio is an extra set of hands!

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Hands-Free, Eyes-Free: A Necessity, Not a Preference



Audio Primes are more likely to be parents juggling work, family, and commutes. They listen because their hands and eyes are busy. This audience was built for audio.

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Not Just Listeners — Super-Consumers



Audio Primes consume
more of everything



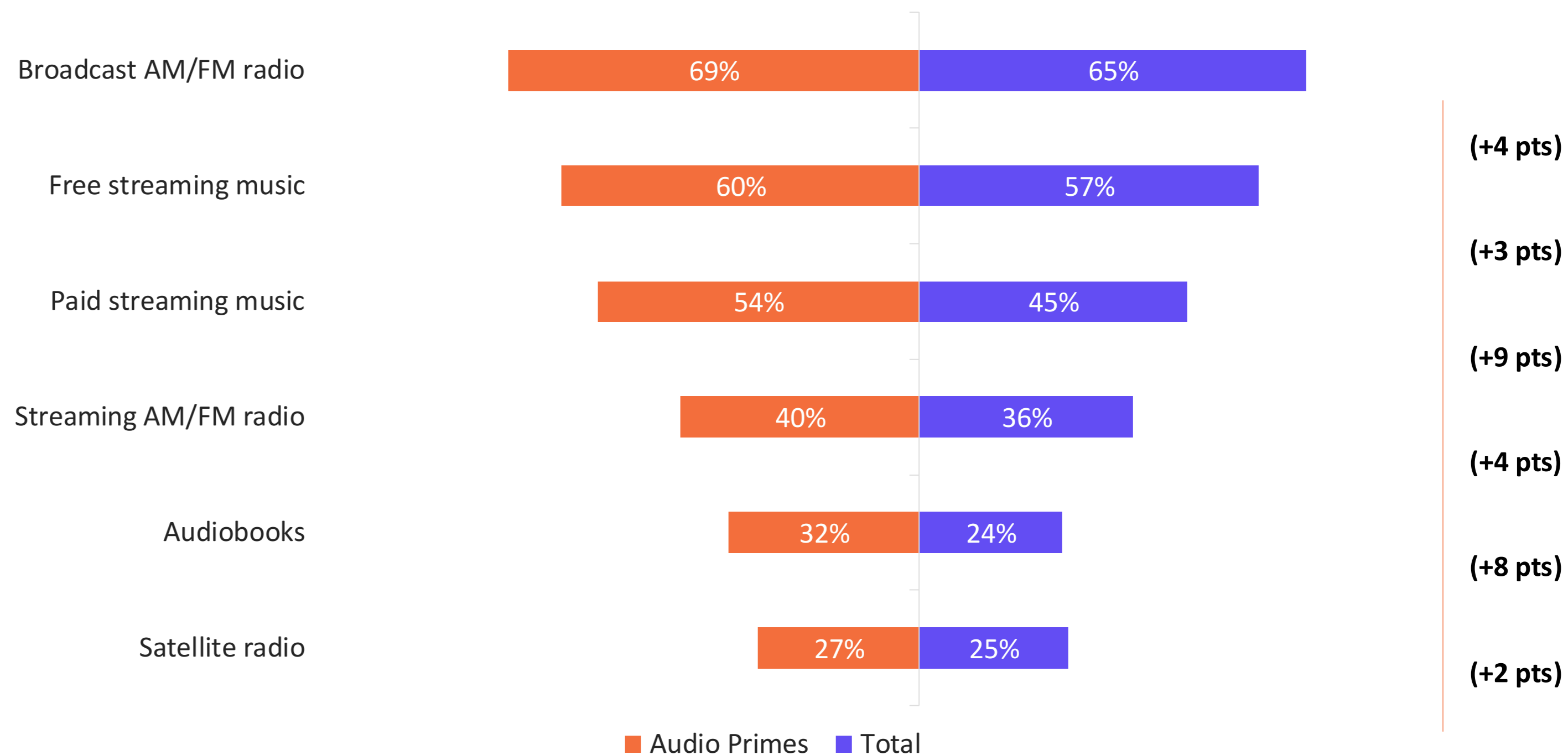
Audio Primes over-index on every audio format — paid streaming (+9 points) and audiobooks (+8 points) lead the way.

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Audio Primes Over-Index on Every Audio Format



Audio Primes are not niche audio consumers. They are super-consumers of every audio format. Paid streaming music (+9 points) and audiobooks (+8 points) are particularly notable. These are people who have organized their media lives around their ears.

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90% of Audio Primes use YouTube, 11 points higher than the total audience.

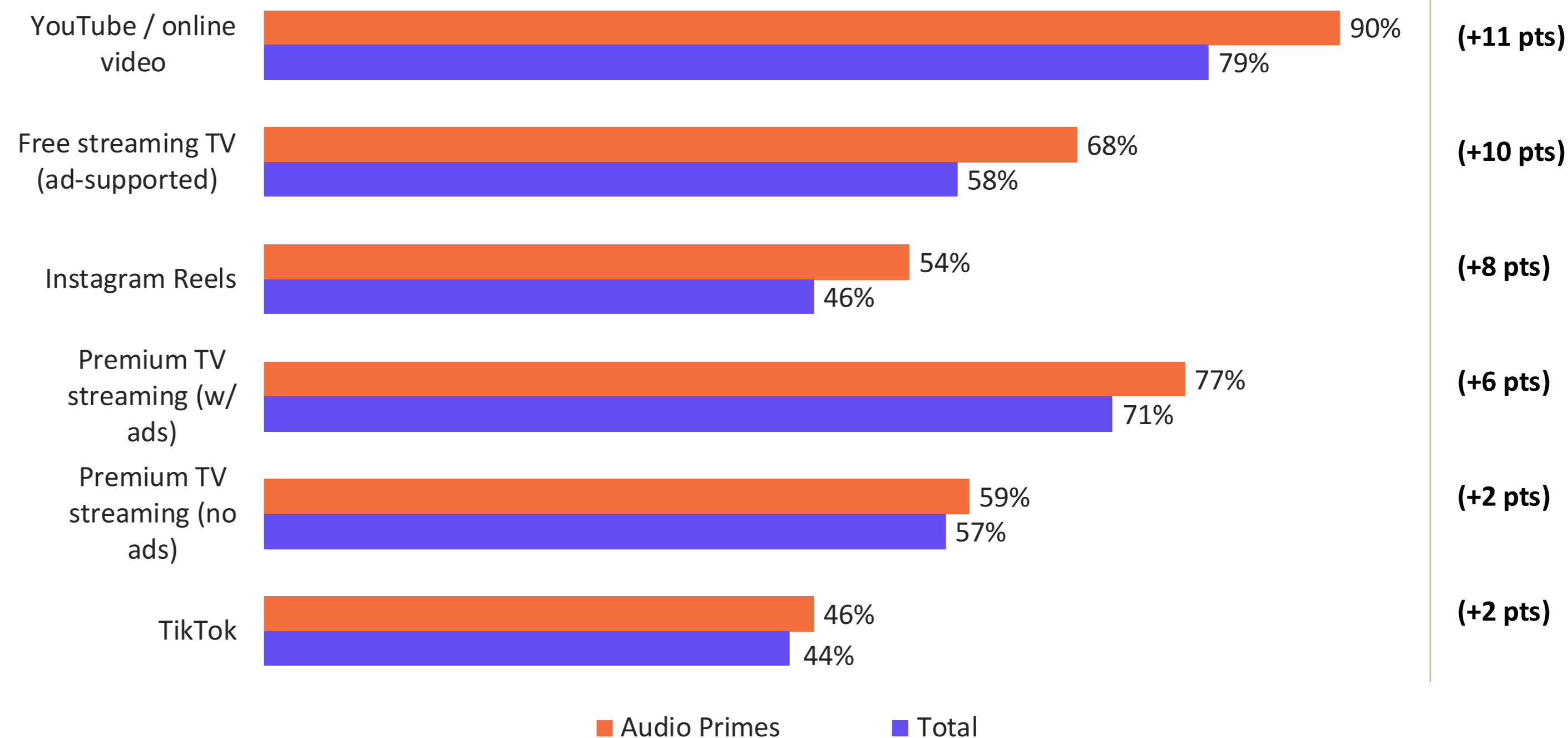
They choose audio for podcasts, not because they avoid video.

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The Plot Twist: They Watch More Video Too



Audio Primes are HEAVIER video consumers than average. They simply choose audio for podcasts. They are sophisticated media consumers who select the right medium for the right content.

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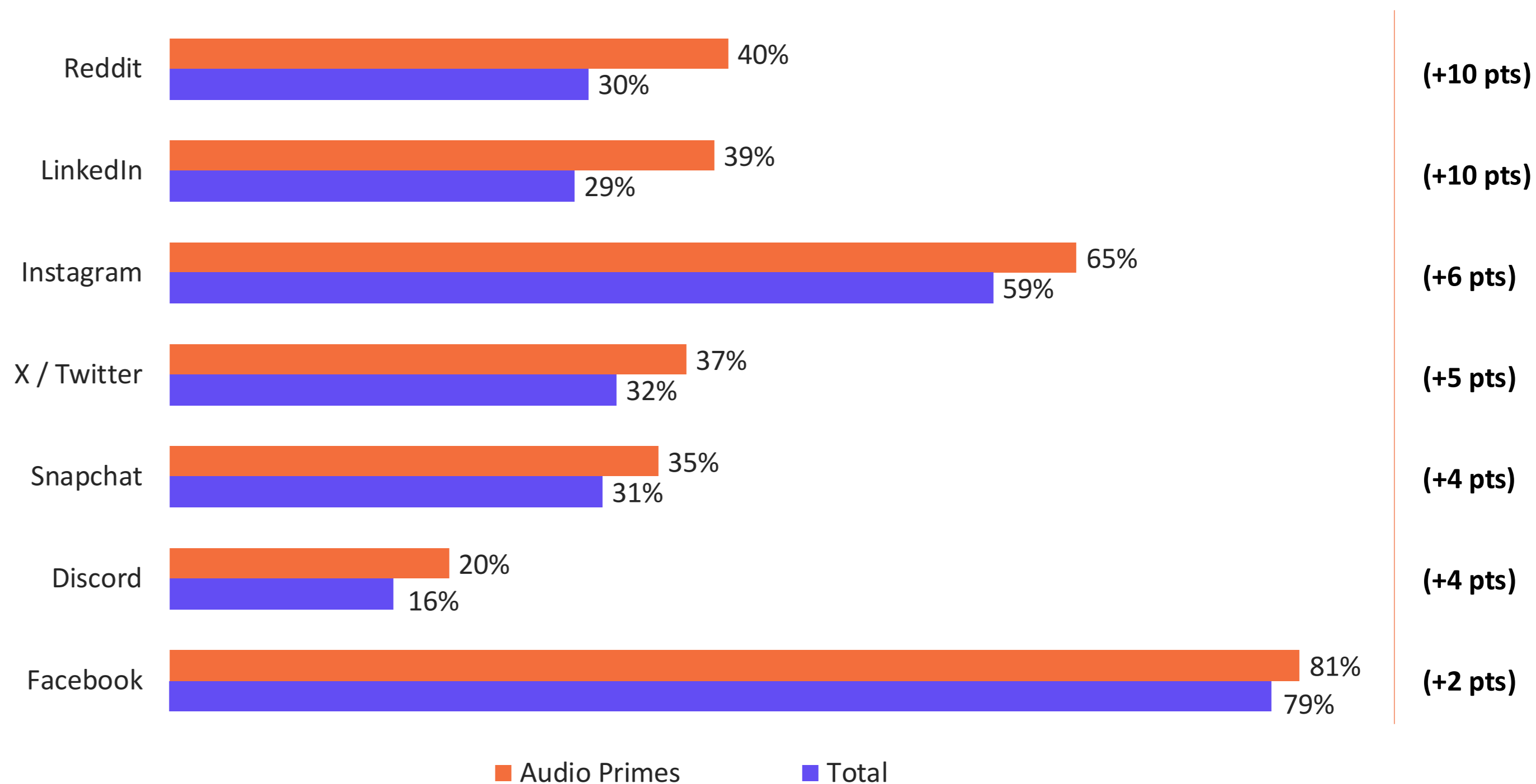
Audio Primes over-index on Reddit and LinkedIn by 10 points each — platforms that reward depth over passive scrolling.

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Where Audio Primes Scroll: Reddit and LinkedIn Lead



The social platforms where Audio Primes over-index most are Reddit (information-seeking, community-driven) and LinkedIn (professional). These are depth-oriented platforms, not scroll-and-swipe. This aligns with the Audio Prime's preference for substance.

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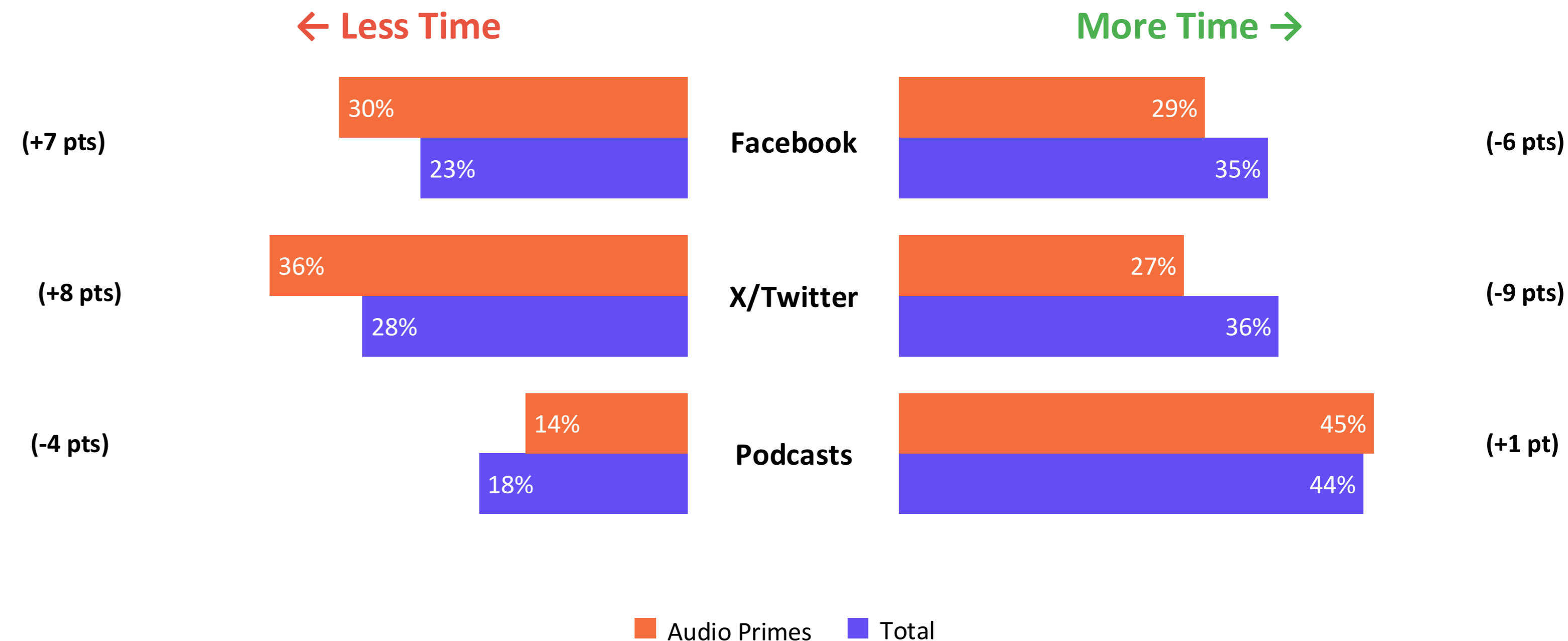
Audio Primes are pulling away from Facebook and X faster than the average listener. Podcasts are the one medium still growing.

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Where Their Attention Is Shifting



Podcasts are the only medium where Audio Primes are simultaneously spending more time and less likely to be cutting back. Their attention is not shrinking. It is redirecting toward audio.

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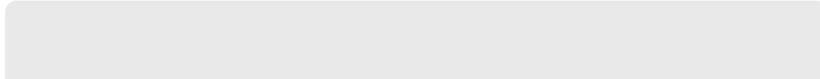
It's Not How Many Ads — It's How Relevant They Are



Too many irrelevant ads

Likelihood to stop listening due to irrelevant ads

Audio Primes  **13%**

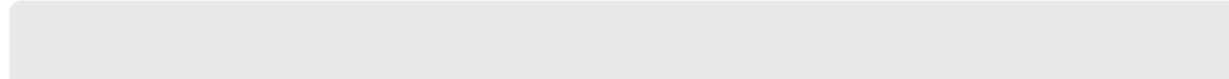
Total  **10%**

+3 pts more likely to leave

Too many ads in general

Likelihood to stop listening due to too many ads

Audio Primes  **13%**

Total  **15%**

-2 pts less likely to leave



Audio Primes are MORE sensitive to irrelevant ads (+3 pts) and LESS sensitive to ad volume (-2 pts). Targeting quality matters more than ad load.

How Audio Primes Listen

Frequency, loyalty, and commitment



77% listen at least weekly, +18 points vs. total. Only 11% are casual, half the rate of all podcast consumers.

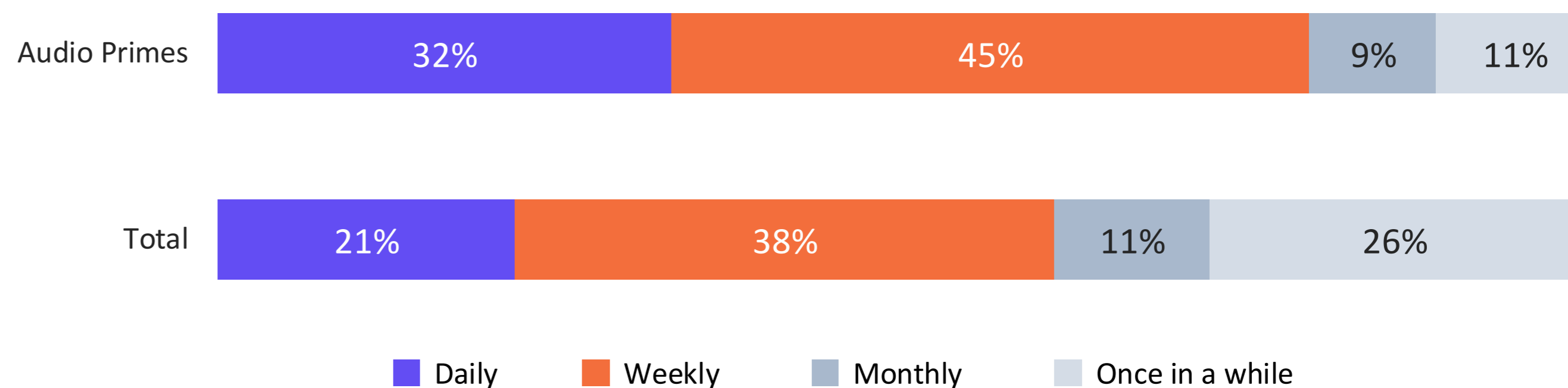
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77% Listen at Least Weekly

Only 11% are casual listeners (vs. 26%)



Three quarters of Audio Primes show up every week without fail. This is not an audience you reach occasionally. It is an audience you can count on, making every campaign and every episode an opportunity to build a lasting relationship.

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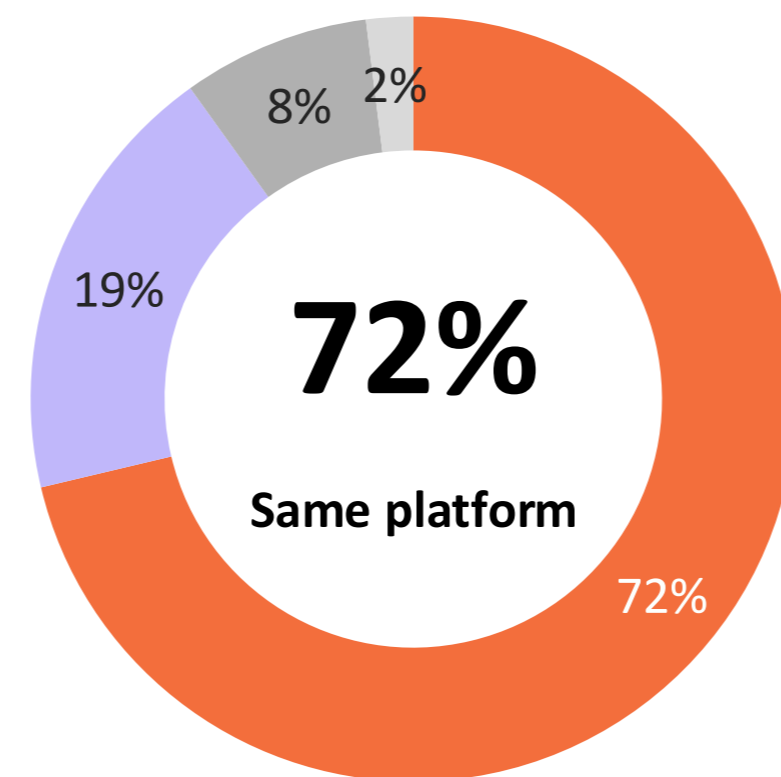
72% of Audio Primes use the same platform every time, 8 points more than the total audience. Once you have them, you keep them.

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Creatures of Habit: 72% Use the Same Platform Every Time



- Same platform always
- Varies by circumstances
- Varies by podcast
- Not sure

Audio Primes vs. Total Population

72%
Audio Primes

64%
Total

use the same platform every time

+8 pts more likely to stick to one platform

Once you have them, you keep them.

Audio Primes vs. Totals :

- Varies by circumstances: 19% vs. 19%
- Varies by podcast: 8% vs. 11%
- Not sure: 2% vs. 6%



Platform loyalty is a proxy for habit strength. Audio Primes are 8 points more likely to have a single platform habit. For platforms and hosting services, this means every subscriber gained from this segment is a durable subscriber.

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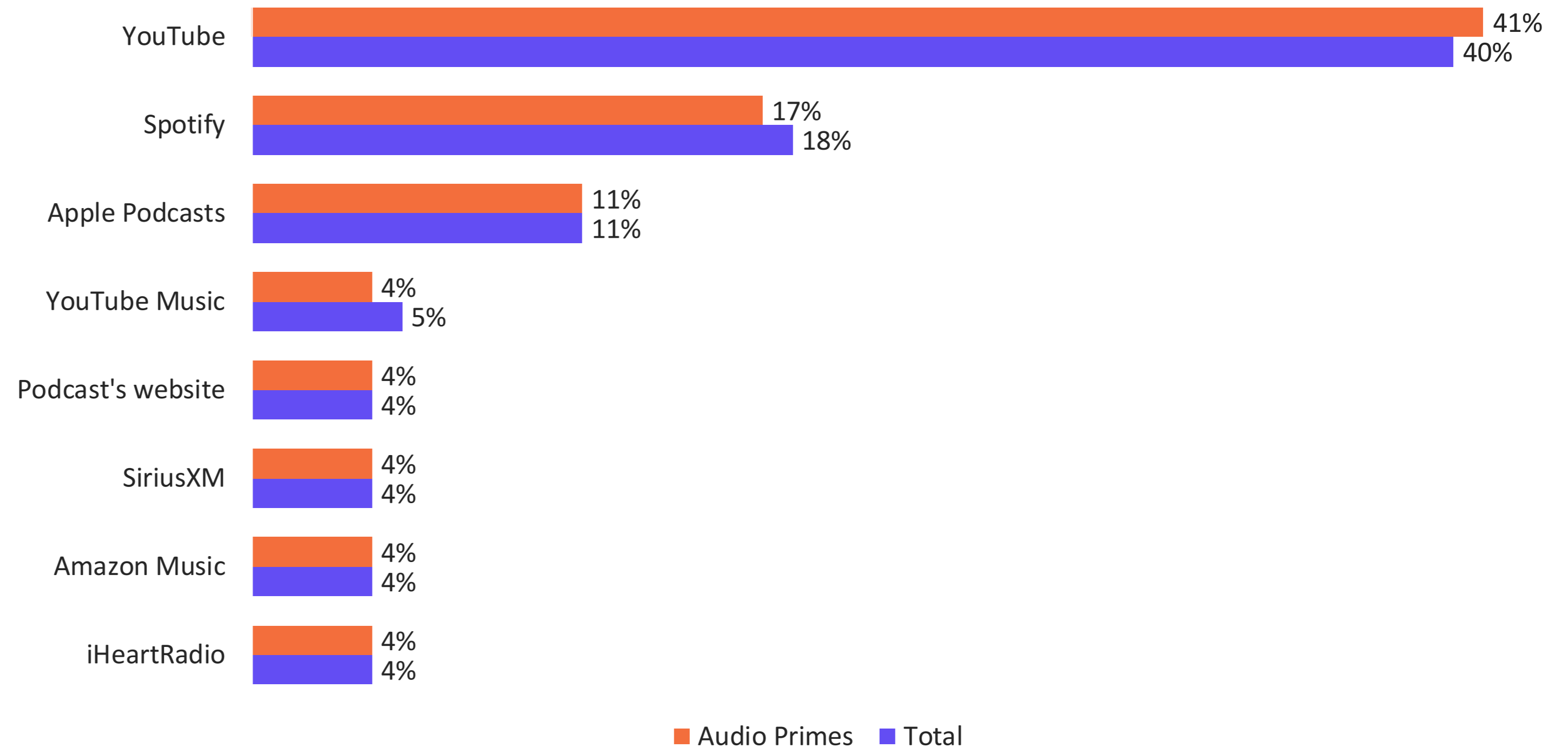
YouTube is the number one podcast platform for Audio Primes at 41%, nearly identical to the total audience. But Audio Primes use it differently — they listen, not watch.

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YouTube Is the #1 Platform for Audio Primes Too



Platform usage between Audio Primes and the total audience is remarkably similar. The real story is not where they listen, but how. Audio Primes choose audio even on a video platform, making podcast audio quality and RSS presence critical regardless of distribution channel.

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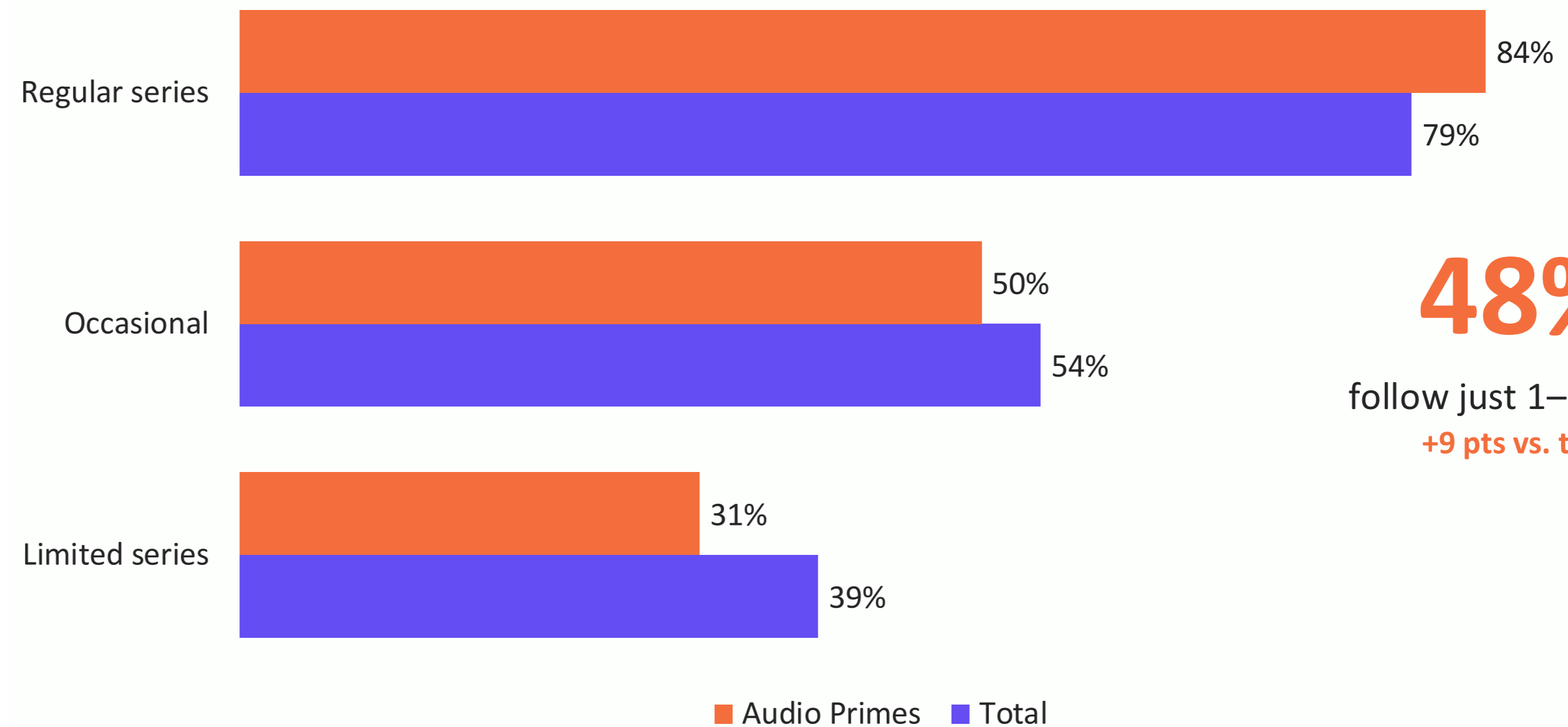
84% prefer ongoing series and 48% follow just 1–2 shows. A few favorites, listened to habitually.

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Fewer Shows, Deeper Loyalty



48%
follow just 1–2 shows
+9 pts vs. total



Audio Primes keep a short, curated rotation of regular shows — limited series underperform. Every slot is earned, making this the highest-leverage audience for creators and advertisers alike.

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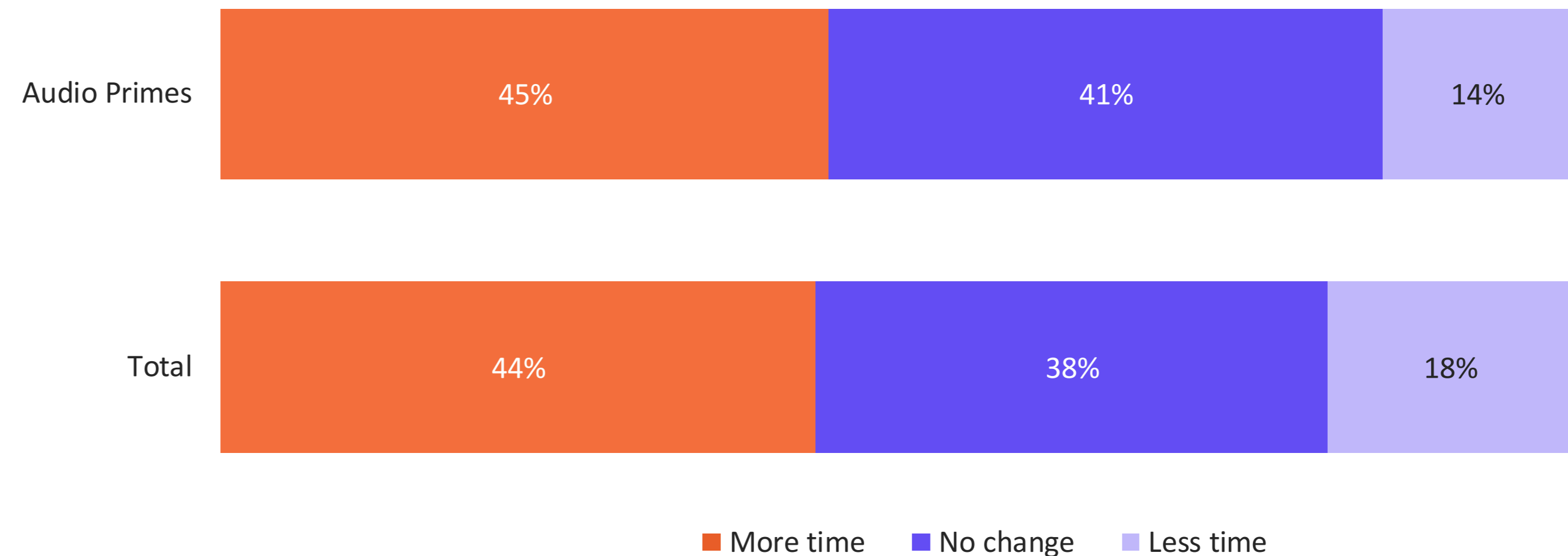
45% are spending more time with podcasts; only 14% are cutting back, 4 points better than total. A growing audience.

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A Stable, Growing Audience



Audio Primes are the most stable and growing segment in podcasting. With churn running 4 points below the total base and the majority either growing or holding steady, this audience represents a durable, long-term investment for creators and advertisers alike.

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22% Have Never Left a Podcast



22%

have never stopped watching or listening to a podcast

vs. 19% of all podcast consumers

+3 percentage points



When Audio Primes find a show they love, they stay. One in five has literally never stopped listening to a podcast. This is an audience defined by loyalty. For creators and advertisers, reaching them is not a one-time event — it's an ongoing relationship.

A stark attitudinal divide:
Audio Primes resist AI voices, valuing authenticity in audio-only channels

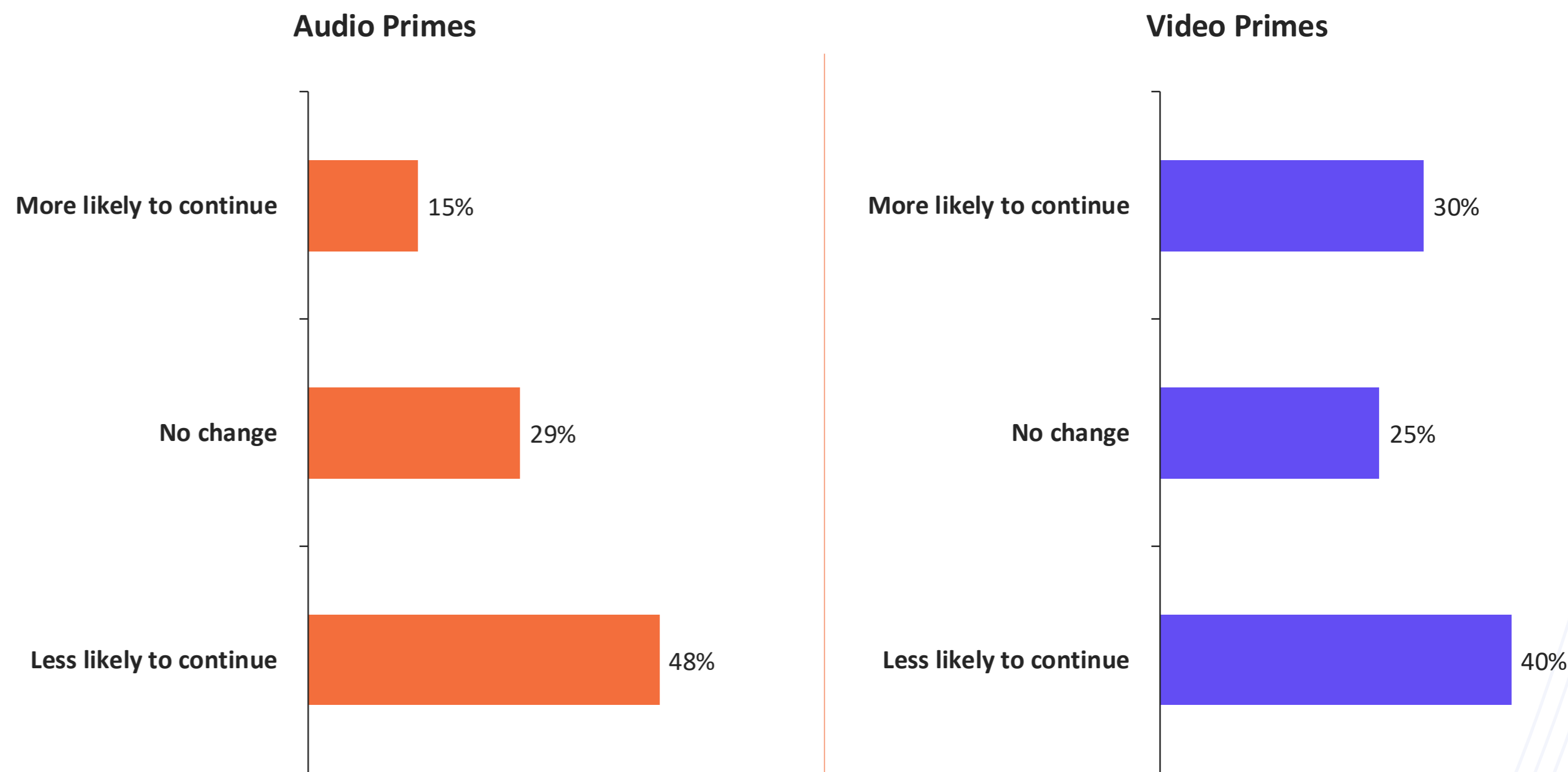
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Receptivity to AI-Generated Voices

If you learned that one of your favorite podcasts featured AI-generated voices, how would that affect your likelihood of continuing to listen?



48% of Audio Primes would stop listening with AI voices vs. only 15% more likely. Video Primes are less negative: 40% less likely, but 30% more likely.

Presented data is based on 325 weighted Audio Prime respondents (listen to 75% or more) and 476 weighted Video Prime respondents (watch 75% or more).



What They Listen To — and How They Find It

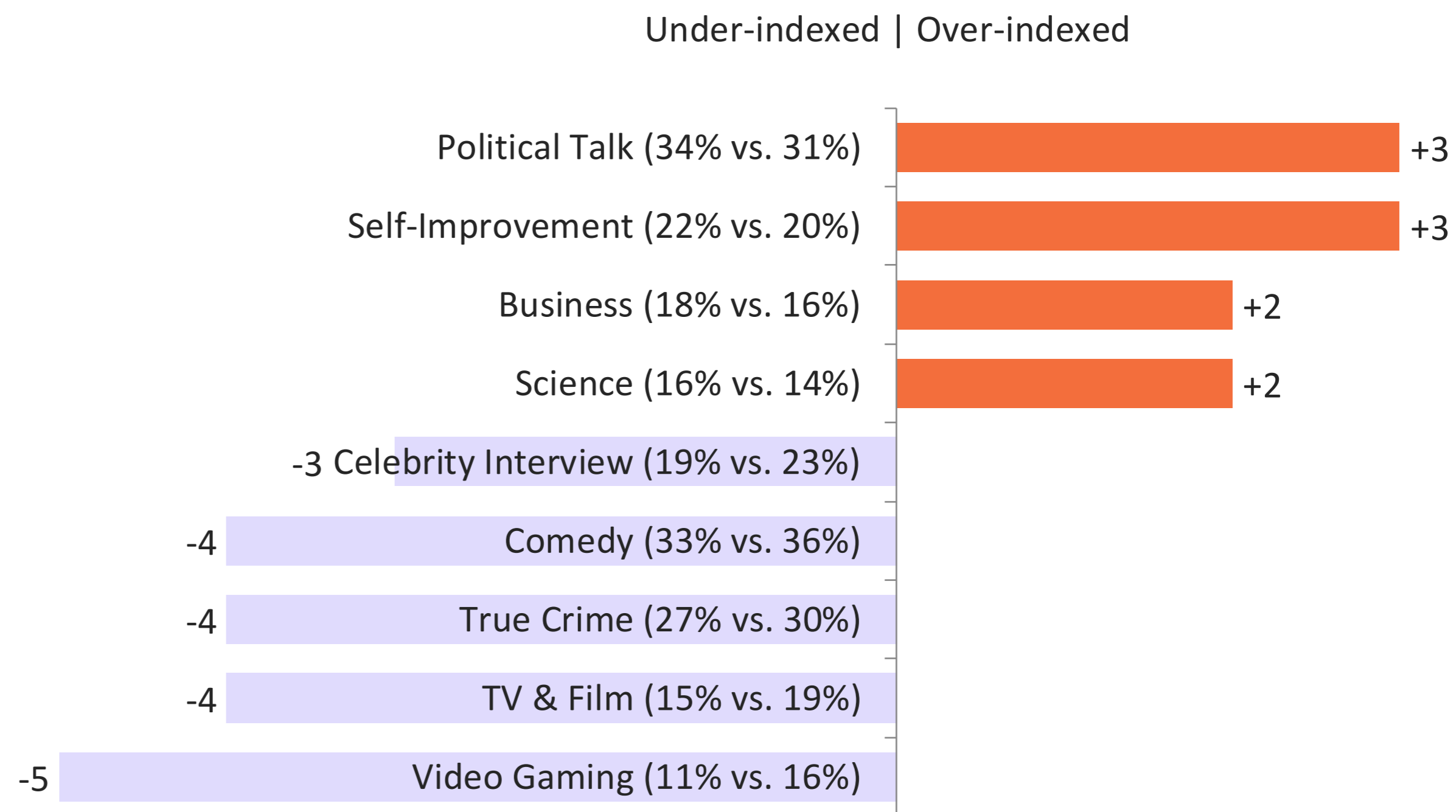
Audio Primes listen to learn and think, favoring political talk, business, and science over gaming, celebs and entertainment.

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Genres That Reward Listening



Audio Primes gravitate toward genres that reward sustained, focused listening: political talk, self-improvement, business, science

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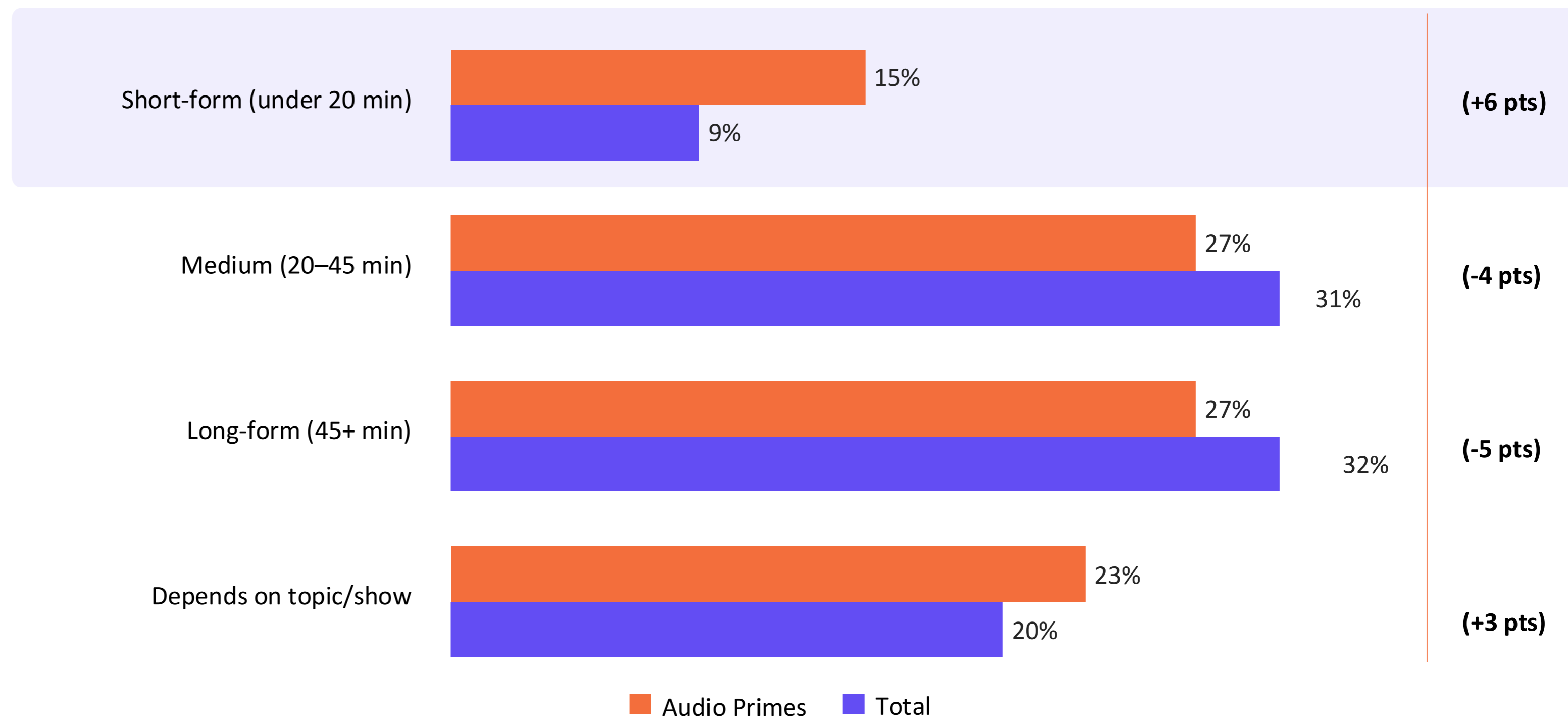
Audio Primes are +6 points on short-form under 20 minutes and more flexible on length overall. Right fit over fixed format.

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Give Me What I Need — Not Always the Long Version



Audio Primes are not uniformly long-form listeners. They value efficiency alongside depth, and are more likely to say it depends on the topic or show. For creators, this means format flexibility is a feature, not a compromise.

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Audio Primes discover shows intentionally — host recommendations +3 points, TikTok -6 points vs. total.

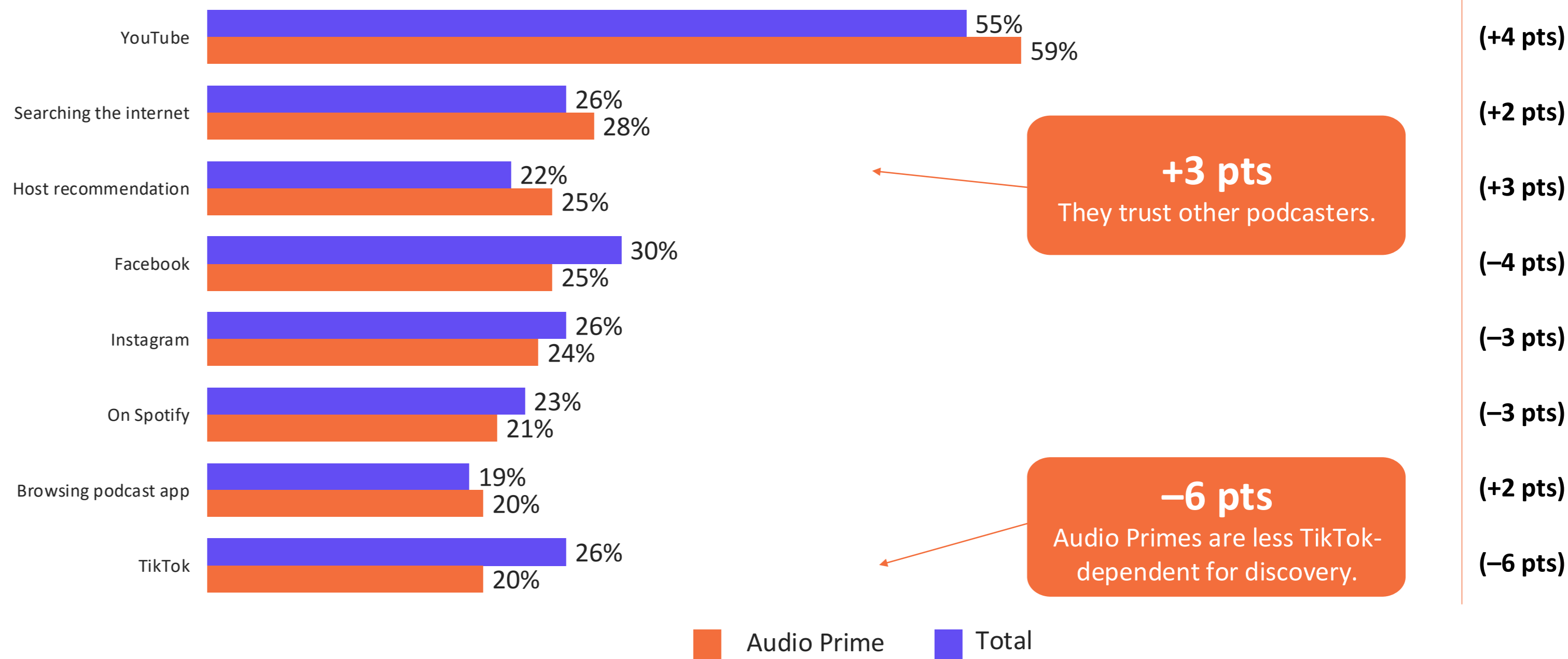
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Intentional Discoverers

% discovering new podcasts via medium



💡 Audio Primes are reachable through in-ecosystem channels: searching, browsing their podcast app, and host cross-promotion. Social media feeds are secondary. The best way to reach this audience is through the podcasting world itself.

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32% started a new podcast last month, +8 points vs. total. Loyal to their shows, yet still seeking new ones.

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Active Discoverers: 32% Started a New Show in the Last Month

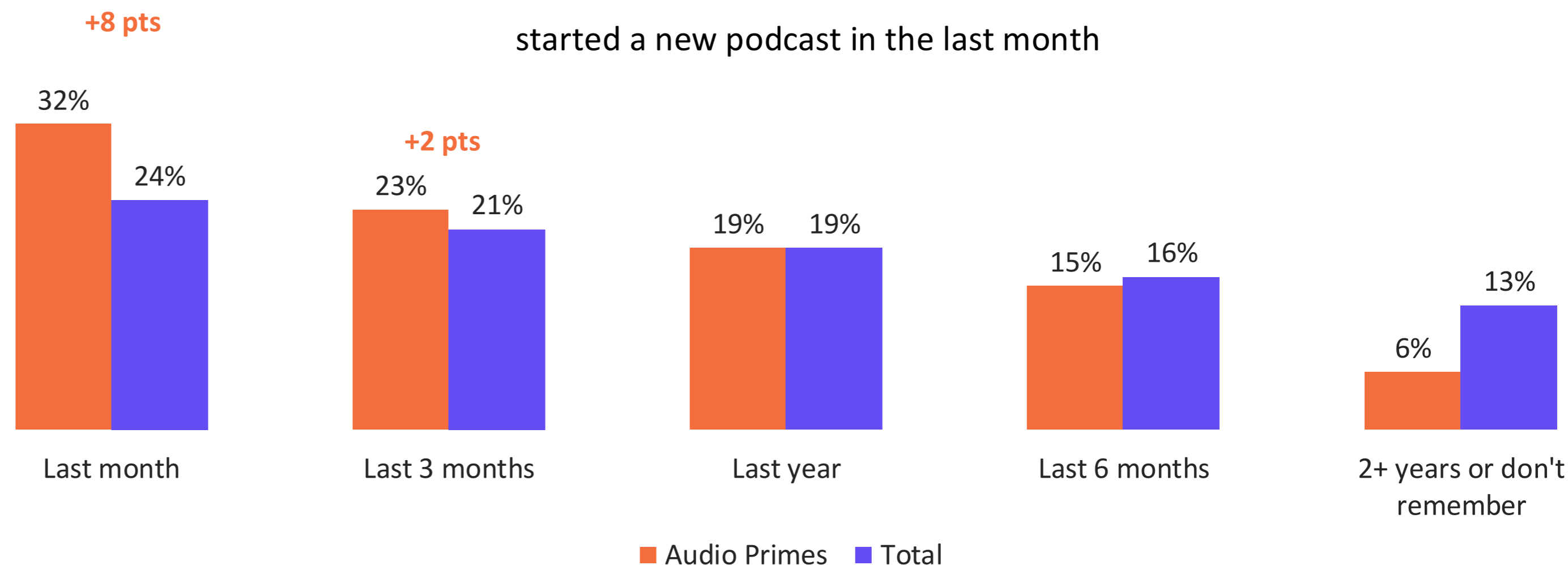
32%

Audio Primes

24%

Total

started a new podcast in the last month



Audio Primes are 8 points more likely to have started a new podcast in the last month. They are the most active discoverers in the ecosystem

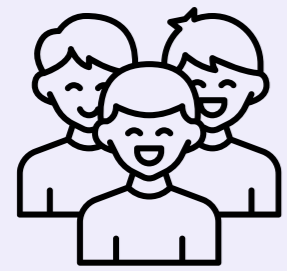
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The Word-of-Mouth Engine

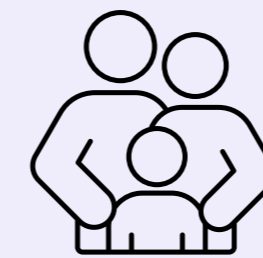
Audio Primes don't just listen —
they spread the word



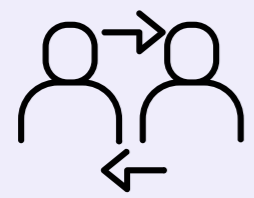
Embedded in a Network of Podcast Listeners



Friends who listen to podcasts: 74%
Audio Primes vs. 62% Total **(+12 pts)**



Family members who listen: 66%
Audio Primes vs. 55% Total **(+11 pts)**



Acquaintances who listen: 47%
Audio Primes vs. 39% Total **(+8 pts)**



Co-workers who listen: 45%
Audio Primes vs. 36% Total **(+9 pts)**



Every social circle of an Audio Prime contains more podcast listeners. Reaching one means reaching many.

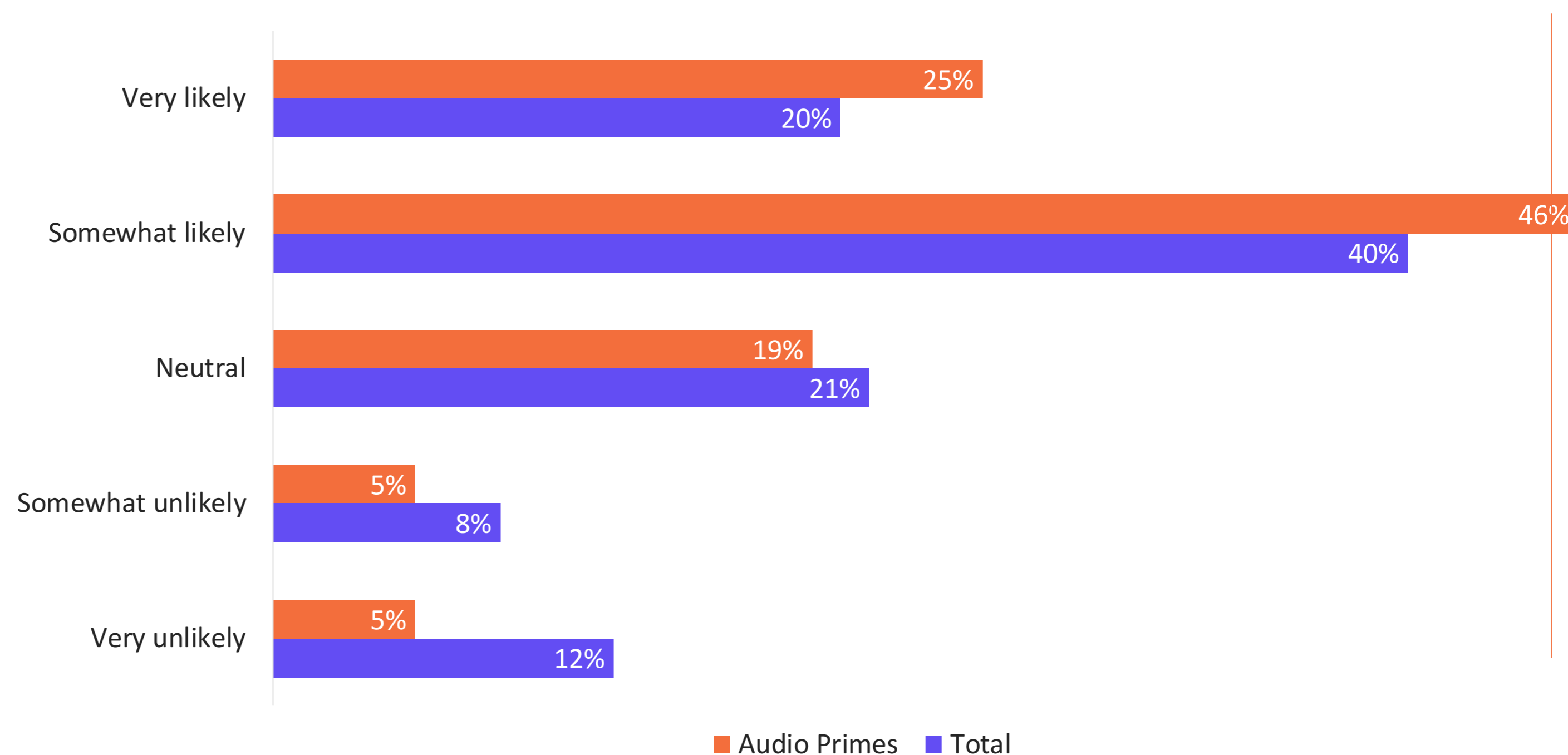
71% are likely to recommend a podcast, +11 points vs. total. Only 5% would never recommend — half the average resistance.

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71% Would Recommend a Podcast



For every 100 Audio Primes, 71 are ready to tell someone about a podcast they love. This is the word-of-mouth engine of the entire ecosystem. Reaching this audience does not just mean one listener. It means many.

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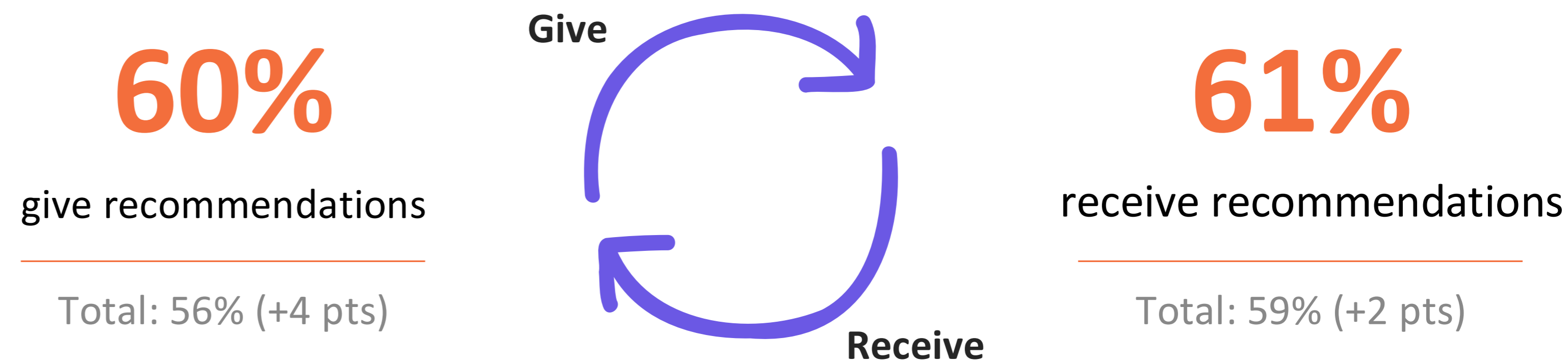
60% give and 61% receive podcast recommendations, both above total. The word-of-mouth flywheel in action.

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They Give Recommendations — and They Take Them



Audio Primes both give and receive recommendations at higher rates. This creates a flywheel: they hear about a show, they listen, they tell someone else. For creators, getting into this recommendation loop is the highest-leverage growth strategy.

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8 Reasons Audio Primes Are Among The Podcast Industry's Most Valuable Audiences



1 **They are the core:** 89% listened this week, 77% listen weekly or more

2 **They are younger, more educated, and more affluent** than the total base

3 **They consume more of every media** — audio AND video

4 **They are the word-of-mouth engine:** 71% will recommend a podcast

5 **They value ad relevance over ad volume**

6 **They actively discover and try new shows** — 32% started one this month

7 **They reward consistency:** 84% prefer regular series, 72% use the same platform

8 **Authenticity is non-negotiable:** 48% would leave over AI voices

Audio-First Is Not a Legacy Format. It's a Premium One



In a media landscape trending toward visual content, Audio Primes are a reminder that the ear remains a powerful gateway to trust, attention, and action. **The smartest creators, platforms, and advertisers will build for this audience** — not despite the rise of video, but because of it.

Audio Primes: Why Do They Choose Audio?

Because **audio builds a stronger bond with a podcast host than video does**, and the science explains why.

A study in 2020 by University College London **compared audio Vs video**. They played participants the same stories and asked which was more **engaging** → Nearly all participants said **video**. But researchers were not measuring opinions. They were measuring physiology → The **body responded more intensely to audio** [Richardson et al. 2020].

Body physiology (e.g. heart rate and skin conductance) reveals what we actually *feel*, even when our conscious mind says otherwise [Betella et al. 2014].

Human brain → dedicated circuitry for voice processing as an emotional and social signal. No visuals → deeper cognitive and emotional processing.

We often hear that "video gets more engagement".

But **engagement** can mean either **attention** (e.g. watch time) or **connection**.

Attention fades when the screen turns off. Connection does not. When it comes to podcasts, Audio Primes are choosing the medium that deepens their connection with the host.

Why Authenticity Is Non-Negotiable

Because **Audio Primes form the strongest parasocial bonds**, and an AI voice has no one on the other side to bond with.

Parasocial relationship → A one-sided bond where the listener feels closeness, trust, and loyalty toward someone who doesn't know they exist [*Horton & Wohl, 1956*].

Casual listeners → **Weaker parasocial relationships** with podcast host → AI voice may not matter.

Audio Primes → **Stronger parasocial relationships** with podcast host → AI voice has no lived experience, no emotion behind the tone, no person to bond with → 48% are less likely to listen to an AI-generated host voice.

Audio Primes are a high-value audience because of a stronger parasocial bond than other listener segments. They recommend, discover, and stay loyal because the relationship with the host is real to their brains.

The Science That Explains the Data

Audio Primes stay, recommend, and reward consistency. Audio-first is premium, not legacy. Research points to one underlying mechanism: the **parasocial bond**. And neuroscience explains how it forms.

Every time a listener presses play on a familiar voice, three systems activate:

1. **Oxytocin.** The brain releases the same bonding chemical triggered during parent-child contact → every episode reinforces it [*Seltzer et al. 2010*].
2. **Mirror neurons.** When the host laughs, the listener's brain fires as if they are laughing too → voice alone is enough for empathic resonance [*Aziz-Zadeh et al. 2010*].
3. **Mere exposure.** Weekly episodes are microdoses of familiarity → familiarity compounds into trust [*Zajonc, 1968*].

Of all media formats, **audio provides the most direct path to a parasocial bond.**
A screen makes you a spectator. A voice makes you a friend.

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“

*A screen makes you a spectator
A voice makes you a friend*



#1 in Audio Primes per podcaster™

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