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The Podcast Landscape

THE PODCAST DISCOVERY PLAYBOOK 2026

How listeners find new shows — the channels, the segments, and what marketers should build for.

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THE BUSINESS OF PODCASTING

U.S. 2025

The Podcast Landscape

betterhelp | npr | ESPN Podcasts | AMERICAN PUBLIC MEDIA | SiriusXM PODCAST NETWORK | SignalHill Insights

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HOW WE KNOW

5,034 adults. 3,791 listeners. Census-weighted.

01 Nationally representative, weighted to Census for age, gender, ethnicity, education, and region.

02 Discovery questions were asked of everyone who has ever listened to listened to a podcast.

03 Two questions anchor the report: how listeners found their favorite show, and how they look for the next one.

THE SAMPLE, NARROWED

Full methodology in the appendix · Sounds Profitable, 2025.

1. YouTube is the discovery engine — 40% of favorite-show discovery.
2. Discovery is a social-feed question, not a search one — organic beats paid about 2 to 1.
3. Age splits the channel mix sharply — TikTok skews 7× younger; radio/TV is 54% older.
4. Discovery channels double as distinct audience segments.
5. The high-engagement segments are Spotify, X/Twitter, and host-rec .
6. Word of mouth is the highest-trust channel — and the least built-for.

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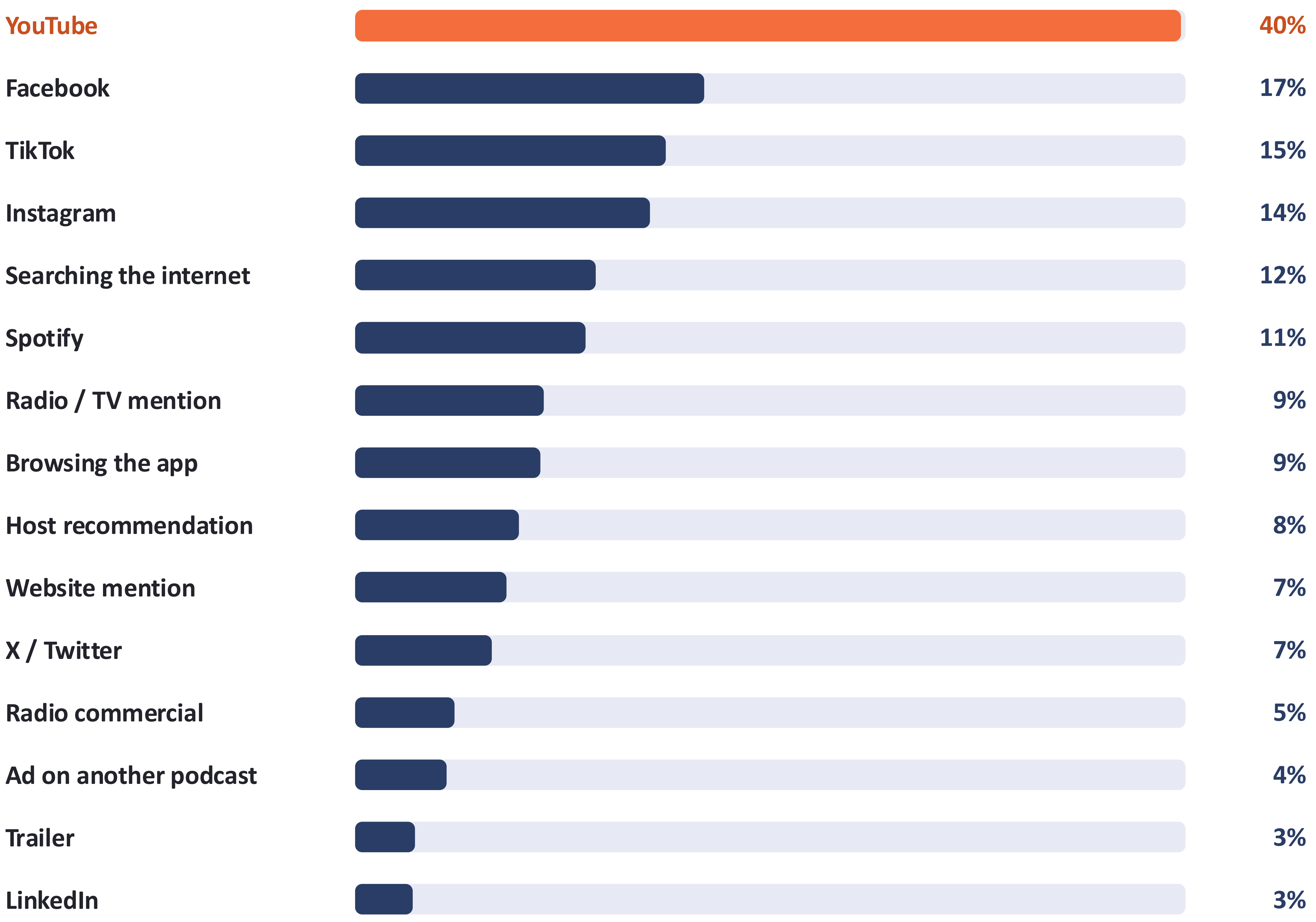
YouTube found twice as many favorites as the next source.

YouTube and social platforms account for **61%** of all favorite-show discovery — while the industry's go-to tools play a more modest role.

WHERE THE FAVORITE SHOW CAME FROM (%)



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Asked where they hunt next, YouTube rises to 55%.

The "next show" question confirms the favorite-show picture — YouTube and social lead both ways.

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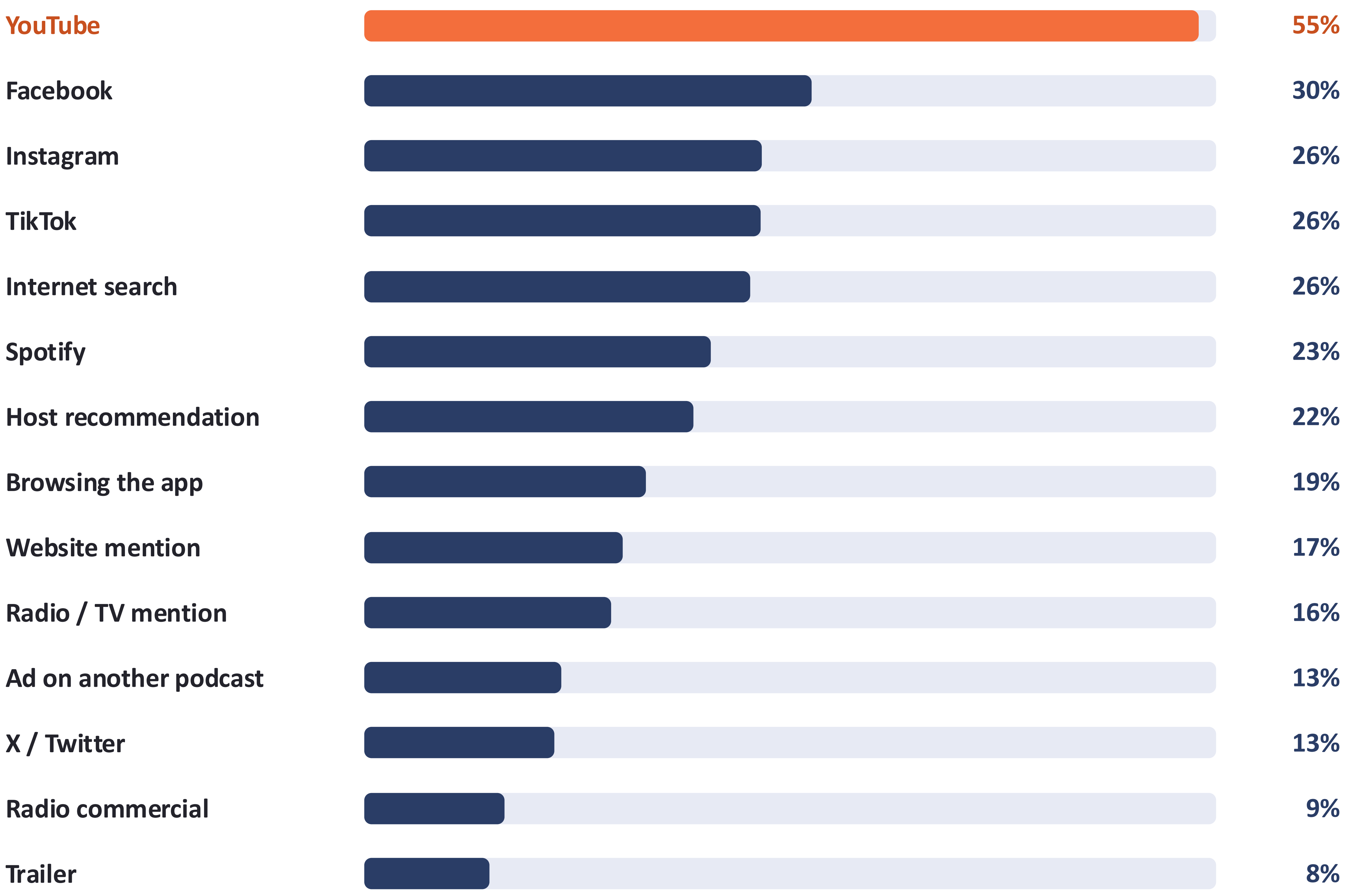
WHERE THEY LOOK FOR THE NEXT SHOW (%)



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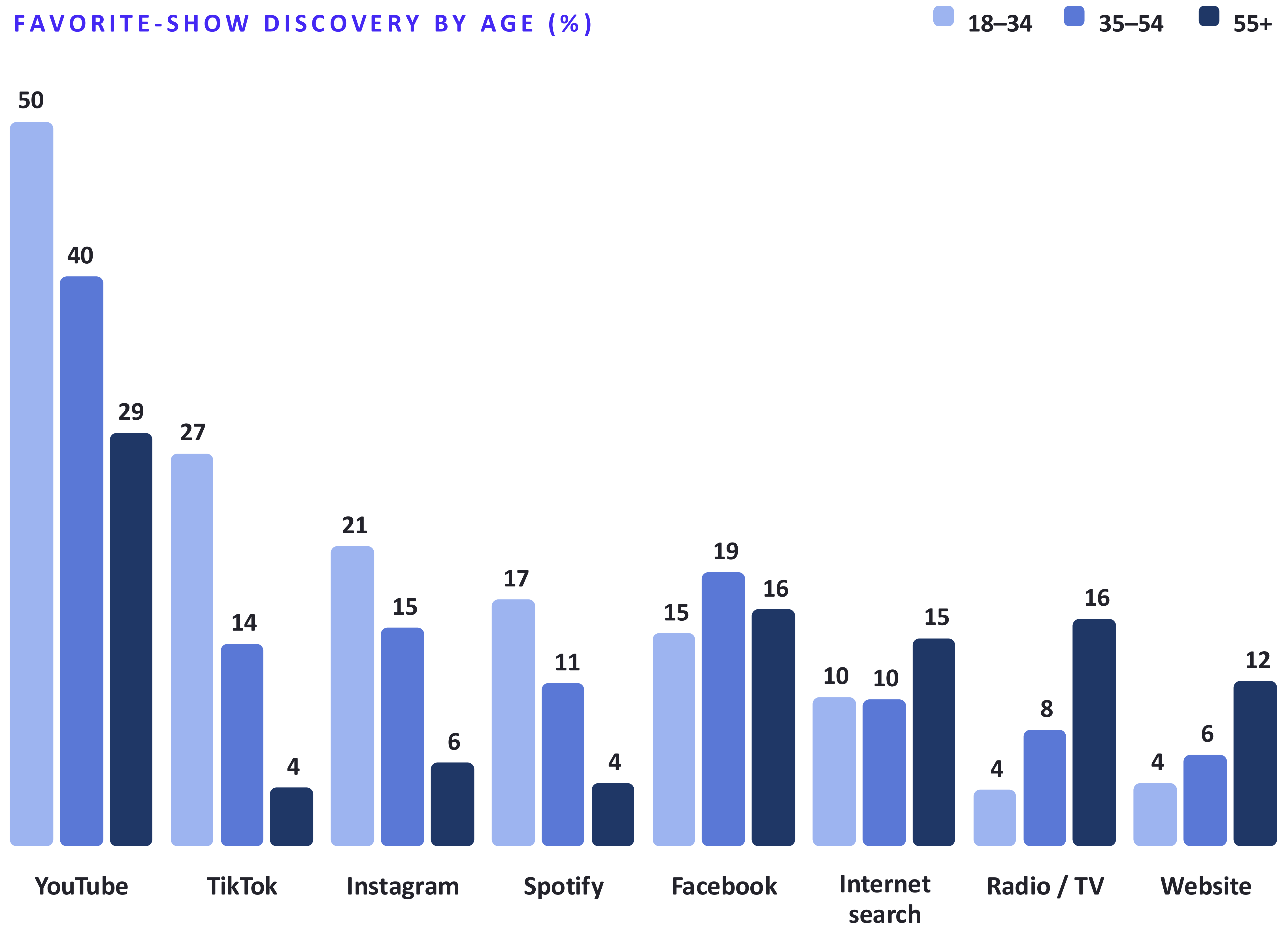
Plan multiple channel mixes, not one.

- TikTok skews 7× younger
- Spotify skews 4× younger
- Radio / TV: 54% are 55+



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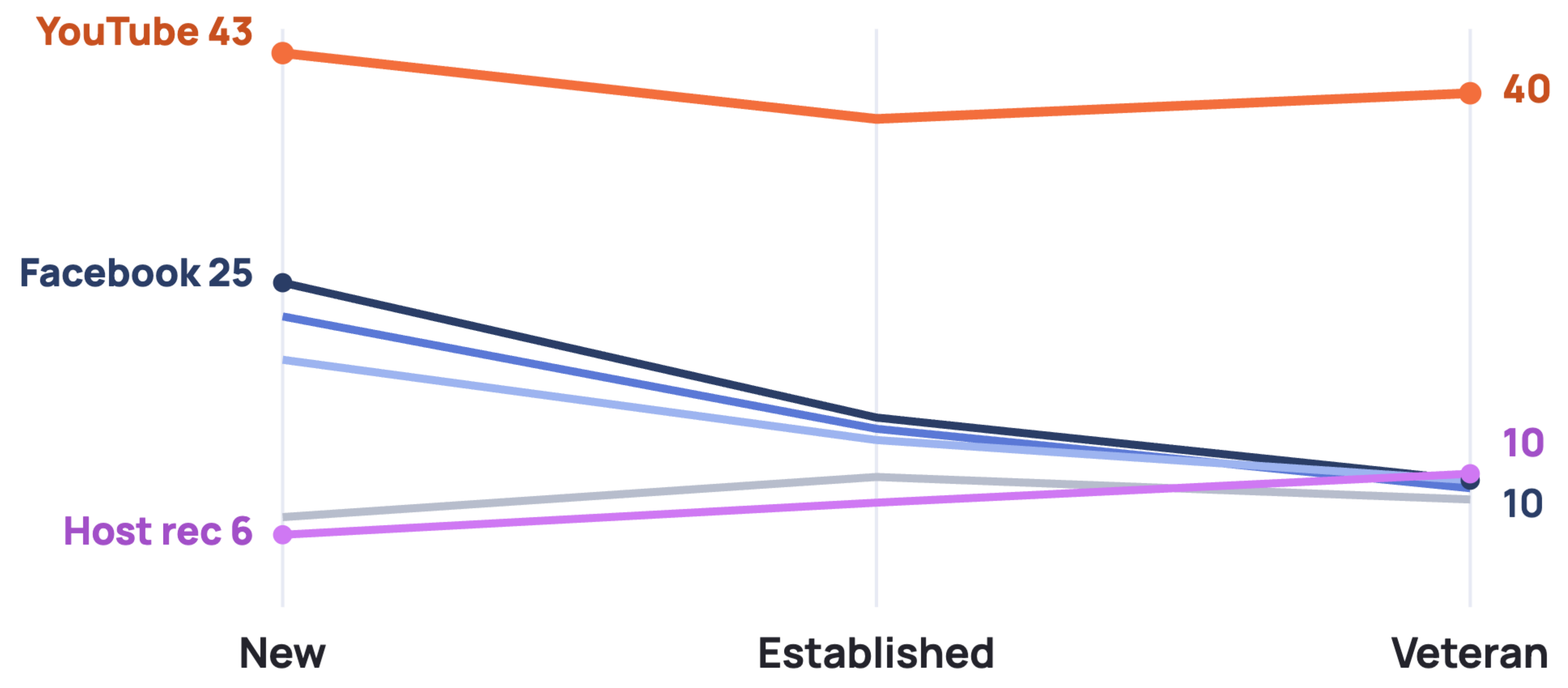
The growth of the medium is happening outside audio.

The most recent wave of listeners was acquired by social and video — not by in-podcast surfaces.

FAVORITE-SHOW DISCOVERY BY LISTENING TENURE (%)



↓ **Social slopes down** — newest listeners over-index.

↑ **Host-rec rises** — a veteran behavior.

→ **YouTube stays flat** near 40%.

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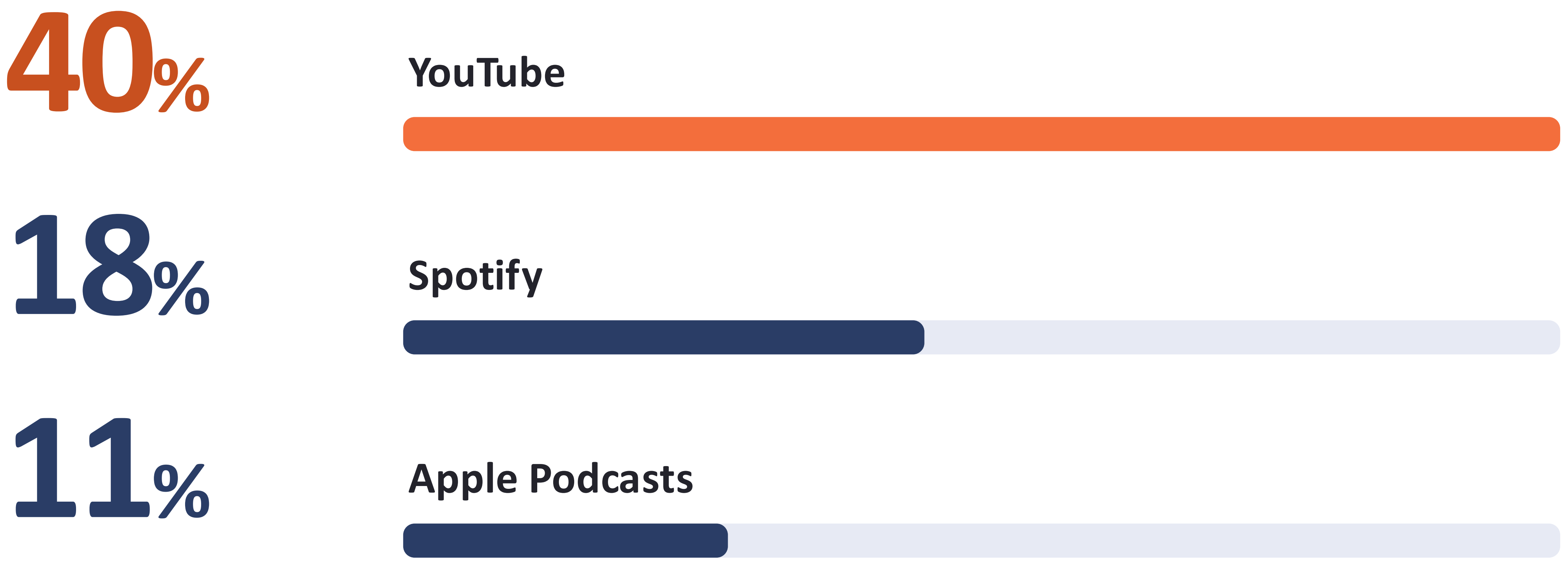
In practice, YouTube is the largest podcast app

40% name YouTube as their most-used podcast app — it has become the default home base for listening and viewing for millions.



Base: 3,791 weighted U.S. listeners · most-used app, single-select. YouTube 40% · Spotify 18% · Apple 11%.

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78% of YouTube podcast users find shows by searching.

A show that's hard to find by name on YouTube is invisible to most of its audience — title and metadata strategy comes first.

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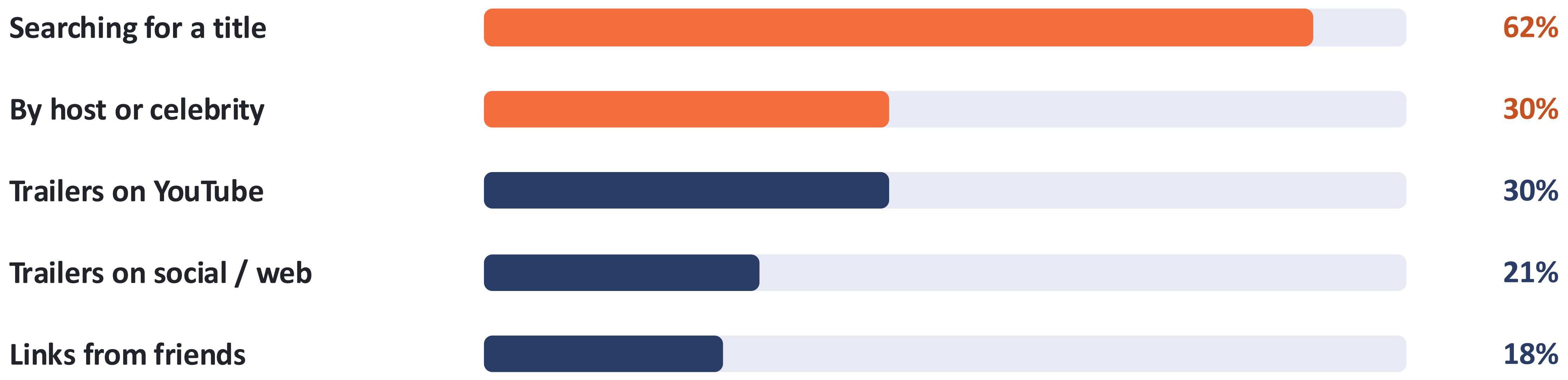
HOW YOUTUBE USERS FIND PODCASTS (%) · INTENTIONAL SEARCH IN ORANGE



78% search by title or host — intentional, not algorithmic.

Asked only of YouTube podcast users · base: 1,509 · multi-select.

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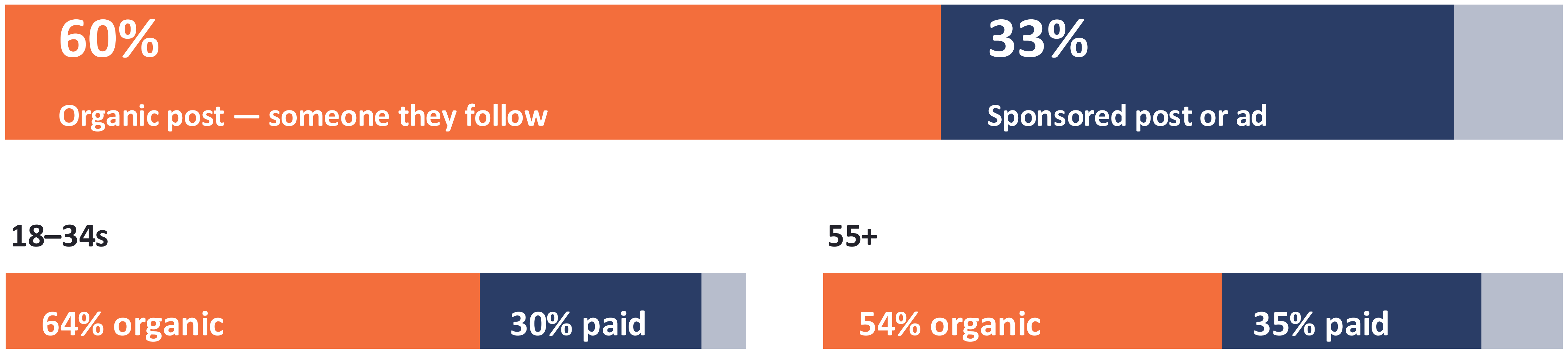
Earned reach is the engine. Paid is the supplement.

Build a clip and organic-poster strategy first. Weight paid toward older demos, where it converts proportionally better.

ALL SOCIAL-DISCOVERED FAVORITES



Asked only of listeners whose favorite came from social.

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Being findable beats being launched well.

Internet search drives **26%** of next-show and **12%** of favorite-show discovery (15% among 55+). And discovery is a continuous, monthly habit — not a launch-week event.

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DISCOVERY IS A MONTHLY HABIT

50% looked for a new podcast in the last month.

45% started a new show in the last three months.

75% of limited-series listeners seek a replacement when one ends.

How often listeners seek out new shows · base: 3,791 weighted U.S. listeners.

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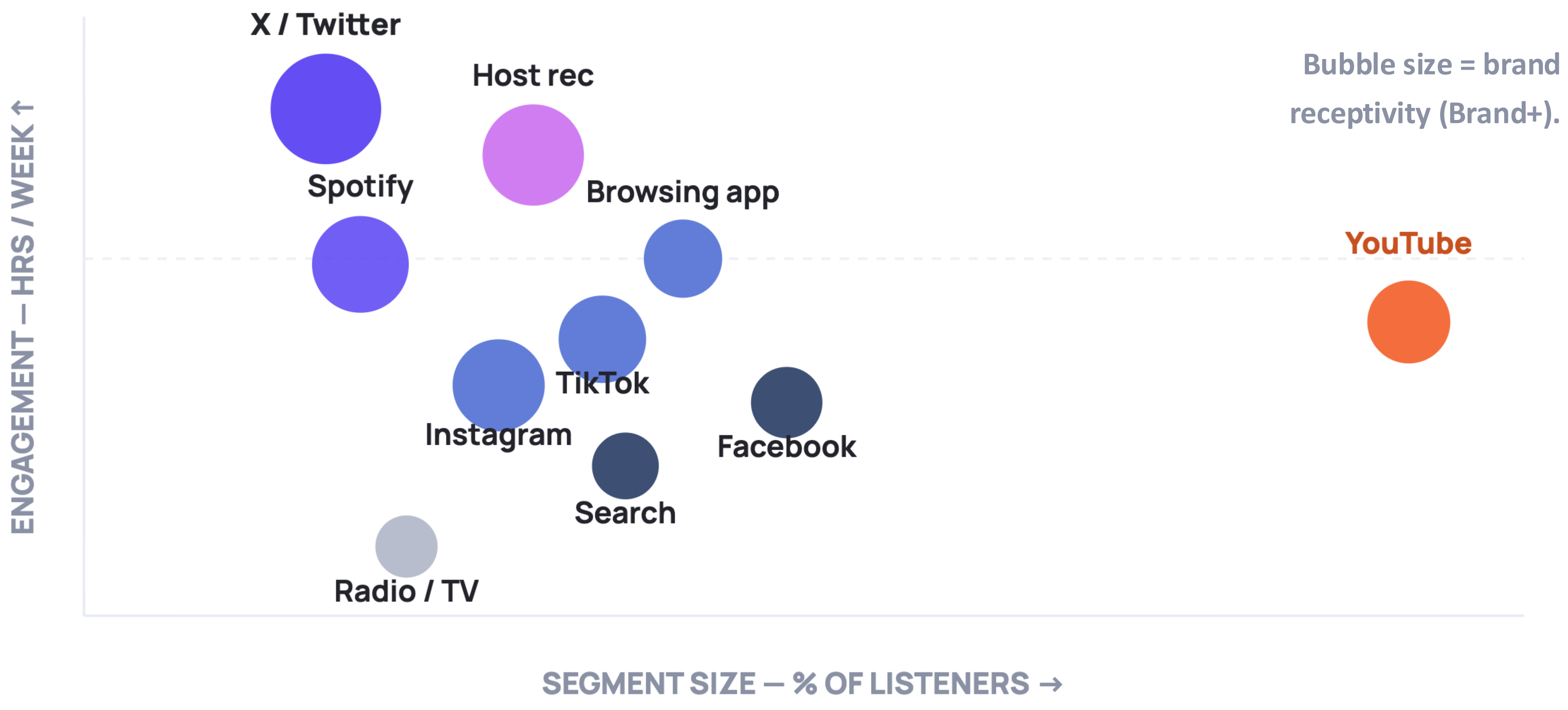
Ten segments, two jobs: reach against engagement.

Top — small but intense

X/Twitter, host-rec, Spotify — your trial & advocacy engine.

Right — large reach

YouTube and Facebook — where you go for scale.



Discovery segments · size = % of listeners · engagement = self-reported hrs/week · Brand+ = net brand receptivity.

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SEGMENT SCORECARD

The numbers behind the map.

Segment	Size	% 18–34	% 55+	Hrs / wk	Brand+
All listeners	—	*34*	*31*	*2.9*	*35*
YouTube	40	43	26	3.7	45
Facebook	17	30	36	3.1	38
TikTok	15	60	9	3.7	52
Instagram	14	54	14	3.4	55
Internet search	12	28	38	3.0	36
Spotify	11	53	16	3.9	58
Browsing app	9	38	30	3.5	50
Radio / TV	9	18	54	2.4	33
Host rec	8	33	33	4.3	60
X / Twitter	7	47	18	4.7	69

Discovery segments · weighted bases vary (252–1,509) · cells heat-shaded; deeper = higher. Baseline row in italics. · Brand+ = net brand receptivity (% more minus % less likely to consider brands advertised on podcasts).

SEGMENT PROFILE · 1 OF 4

YouTube discoverers: the volume baseline.

40%

of all listeners

n = 1,509 — the largest single segment in the study.

Education

History

News commentary

Arts

WHO THEY ARE	Broad — they look like the overall population. **43% are 18–34** , the rest spread across every age band.
HOW THEY LISTEN	**65%** use YouTube as their primary app; **24% are video-leaning** — the highest of any segment.
THE CATCH	**48%** named YouTube as their **only** discovery source — you can't reach them anywhere else.
CONTENT TILT	Education, History, News Commentary and Arts over-index here.
IMPLICATION	**A required surface for any launch — but too broad to target as a niche.**

SEGMENT PROFILE · 2 OF 4 · THE HIGH-VALUE PAIR

Spotify and X/Twitter: small, but the sampling and advocacy engine.

Spotify

422 · 11%

WHO THEY ARE	**53% are 18–34** — a young, music-native audience.
HOW THEY LISTEN	Top-tier engagement at **3.9 hrs/week**; **58% brand-friendly**.
CONTENT TILT	Music, Fiction, History and Comedy.
IMPLICATION	**Young, engaged, brand-open — ideal for trial.**

X / Twitter

252 · 7%

WHO THEY ARE	**79% male** — the biggest demographic skew in the data.
HOW THEY LISTEN	**4.7 hrs/week and 69% brand lift** — both the highest in the study.
BEHAVIOR	Omnivores — an average of **4.19 discovery sources** each.
IMPLICATION	**Small, but the advocacy and word-of-mouth engine.**

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TikTok and browsing-the-app: diversity and scale vs. premium value.

TikTok

587 · 15%

WHO THEY ARE	**60% are 18–34** and **36% Hispanic** — the most diverse segment.
HOW THEY LISTEN	Vertical clips are the entry point; brings demographic breadth.
CONTENT TILT	Comedy, True Crime and Pop-culture clips.
IMPLICATION	**The channel for diversity and scale among the young.**

Browsing the app

337 · 9%

WHO THEY ARE	Highest income — **37% earn $100K+** (an Apple proxy).
HOW THEY LISTEN	**71% audio-leaning** — deliberate, in-app browsers.
CONTENT TILT	Over-indexes on News Commentary and Technology.
IMPLICATION	**Small, but premium per-listener value.**

TikTok base: 587 · Browsing-app base: 337. The other five segments appear on the scorecard (slide 20).

SEGMENT OVERLAP · % OF EACH ROW THAT ALSO CREDITS THE COLUMN

Some channels reach the same engaged people from different angles.

Segment	Also YouTube	Also Facebook	Also TikTok	Also Instagram
YouTube	—	22	18	20
Facebook	51	—	32	34
TikTok	50	33	—	36
Instagram	52	38	39	—
Spotify	48	28	30	33
X / Twitter	60	35	42	45
Radio / TV	30	20	12	14

The X/Twitter row runs hot. Its listeners are everywhere — 60% also use YouTube, 45% Instagram, 42% TikTok.

YouTube and Radio/TV are the solo channels. ~48–49% name only that source — they reach people outside the podcast ecosystem.

Social video is one ecosystem. TikTok, Instagram and Facebook overlap each other 32–39%, and 50–52% of each also credits YouTube.

More channels means more engaged. Overlap correlates with heavier listening.

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Multi-select · overlap matrix, row-wise % · weighted bases vary.

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Name the company. Brand affiliation reads as a positive signal.

57% are neutral — brand affiliation rarely hurts — and net lift runs **+57 to +69** across the social-discovery segments, your most valuable audiences.

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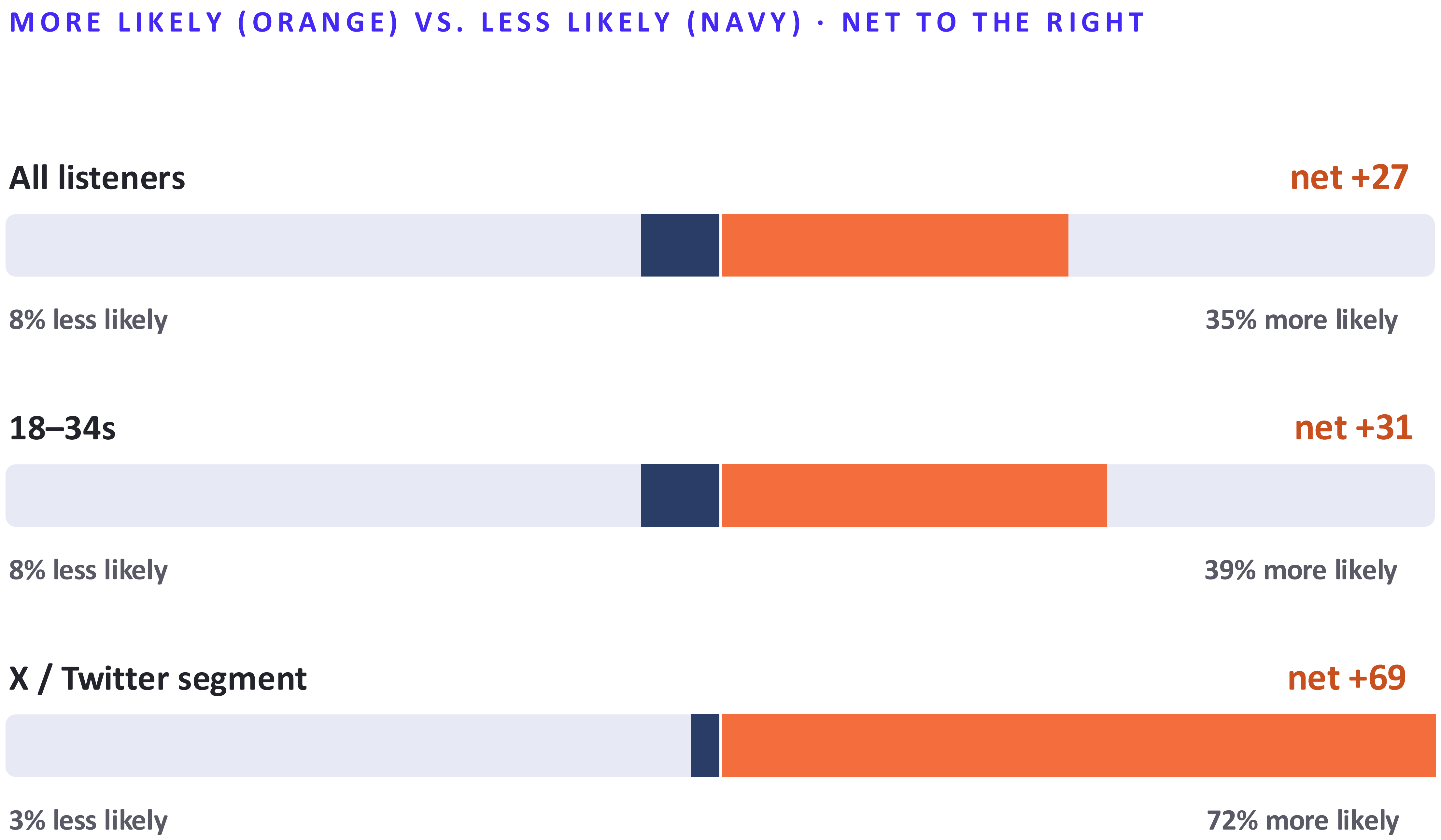

Base: 3,791 weighted U.S. listeners. Net = % more likely minus % less likely. Remainder neutral.

THE CHANNEL-MIX PLAYBOOK

Build a tailored channel mix for each audience.

Young, diverse, social-native

YouTube	●●●
TikTok	●●●
Instagram	●●○
Spotify	●●○

Vertical-clip first, organic creators, brand-friendly. TikTok + Instagram bring 36% and 30% Hispanic reach.

Older, deliberate, content-driven

Internet-search SEO	●●●
Website mentions	●●○
Earned radio / TV	●●○
YouTube (by name)	●●○

Topic-led marketing — a show about a thing, not a host — works disproportionately well.

Audio-first, high-income, traditional

Apple charting	●●●
NPR-style editorial	●●○
Clean metadata	●●○
Internet search	●○○

Smaller, but premium per listener. News, business and tech shows over-index here.

Cross-cutting: Facebook holds up across all three — the cleanest single buy.

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Make a video-shaped plan. plan. Build a word-of-mouth mouth layer.

Expectations barely move by age — but discovery discovery happens on video. Distribute audio-first, first, yet ship full episodes and clips to YouTube, YouTube, TikTok, Reels and Shorts.

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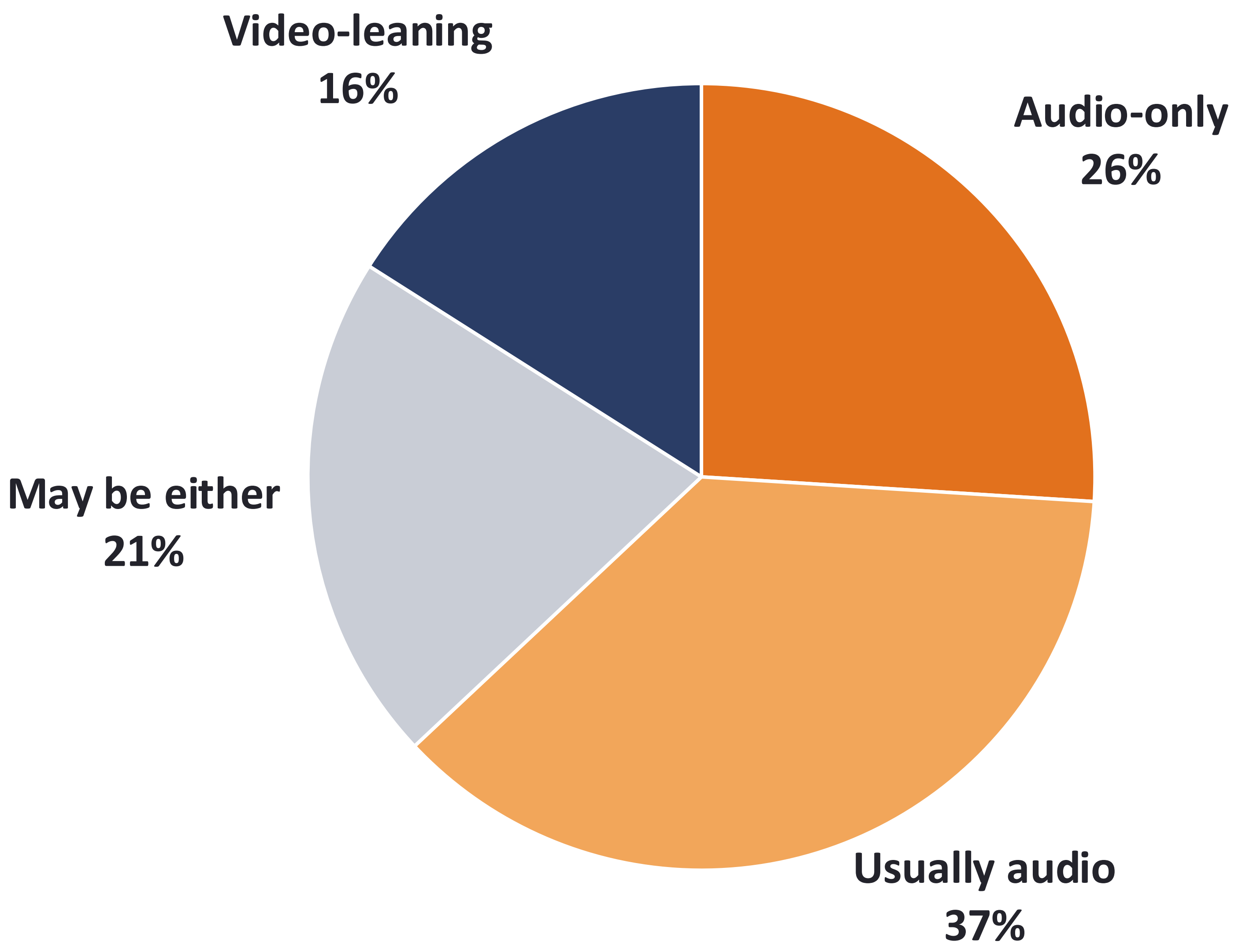
HOW LISTENERS EXPECT TO CONSUME PODCASTS



THE WORD-OF-MOUTH LAYER

64%

get recs from friends.

72%

are likely to act on them.

Consumption expectation: Sounds Profitable, The Podcast Landscape 2025. Word-of-mouth: base 3,791 weighted U.S. listeners.

MATCH THE SEGMENT TO THE CAMPAIGN GOAL

Use the right segment for the right job.

FOR TRIAL & SAMPLING

Spotify · Host-rec · X / Twitter · Instagram

High engagement, high brand receptivity — and they recommend onward.

FOR SCALE & AWARENESS

YouTube · Facebook

Large and more single-channel — lower per-listener engagement, but the highest absolute reach.

FOR CATEGORY AUTHORITY

Browsing-app · Internet-search

Small, high-income, audio-first and deliberate — the place to build credibility.

Mapped from the segment scorecard (slide 20) and segment map (slide 19).

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DISCOVERY IS WINNABLE WHEN YOU BUILD FOR WHERE CONSUMERS ALREADY ARE.

01 Be on YouTube — and findable by name.

02 Lead with organic social and earned reach.

03 Plan for the audience you want — multiple mixes.

04 Run discovery for 12 months — and name the brand.

THE FULL PODCAST DISCOVERY 2026 REPORT IS AVAILABLE FROM SOUNDS PROFITABLE