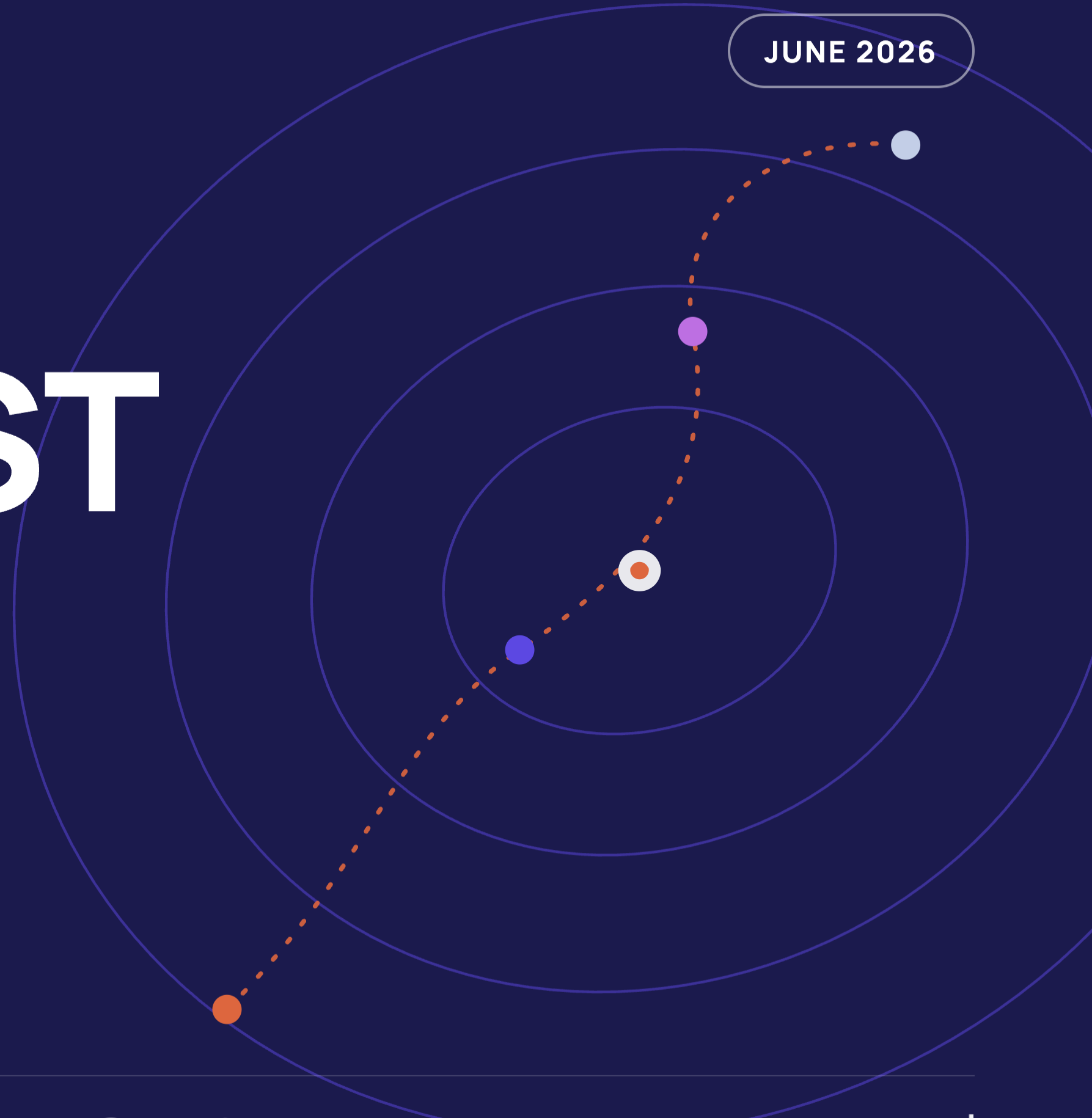


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JUNE 2026

THE PODCAST ATLAS

A Map of the Creator Ecosystem



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THE THESIS

Podcasting has evolved into a federation of interconnected creator-led experiences

“Podcasting” no longer describes a single behavior. It is a federation of content experiences – audio episodes, video episodes, short-form clips, social distribution, and newsletter touchpoints – held together by creator–audience relationships that flow across all of them.

01

Distinct territories, distinct roles

Each format does a different job in the advertising value chain.

02

The creator is the connective tissue

The relationship – not the platform – is what audiences follow.

03

The whole system outperforms any single piece

No single territory captures the full advertising value alone.

METHODOLOGY

About This Study

An independent study of how U.S. audiences use ad-supported creator and media platforms.

01

The sample

5,061 U.S. adults aged 18+ who used at least one ad-supported creator or media platform in the past 30 days.

Data collected by Signal Hill Insights

02

How to read the data

Figures are reported as collected, without demographic weighting – read them as describing ad-supported-platform users, not the U.S. population. Multi-select questions may sum to more than 100%.

03

Definitions

“Primes” are each platform’s most engaged users. “Top-2-Box” combines the two most positive responses on a scale. Full question-level detail is available on request.

THE MAP

The creator ecosystem is composed of five distinct functional territories



01

TERRITORY 1

AUDIO PODCASTING

The Trust Engine

Deep credibility built through intimate, undistracted creator–listener relationships. The companion medium.

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TERRITORY 1 · AUDIO
PODCASTING

Monthly Reach by Platform

% of U.S. ad-supported-platform users



THE READ

Audio Podcasting's role is not reach.

At 36% it trails YouTube and Facebook by a wide margin – but reach was never its job. Its job is to build and store trust.

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Base: U.S. adults 18+ on ≥1 ad-supported creator/media platform, past 30 days · multi-select may sum to >100%.

Audio: Attention & Listening Contexts

Audio listeners

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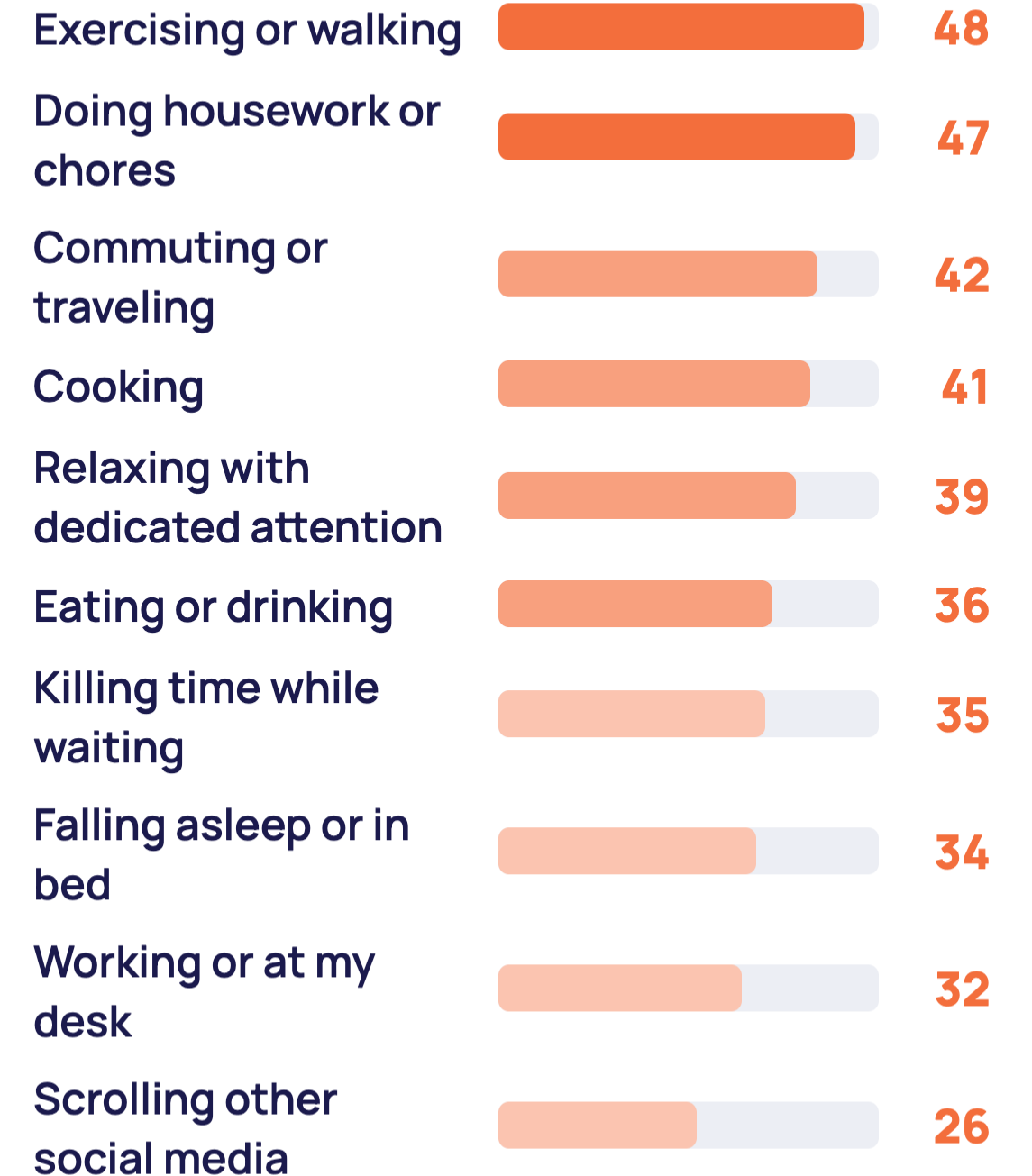
Attention level while listening



■ Full attention
 ■ Mostly paying attention
■ Split attention
 ■ Background (5)

77% give full or near-full attention (full + mostly)

Top listening contexts



Extended, low-distraction windows where the creator's voice is the primary companion. · Base: audio listeners, · multi-select.

TERRITORY 1 · AUDIO
PODCASTING

Audio goes where screens can't

Among people who consume both formats, audio owns the screen-free, hands-busy parts of the day.

Dual audio + video listeners

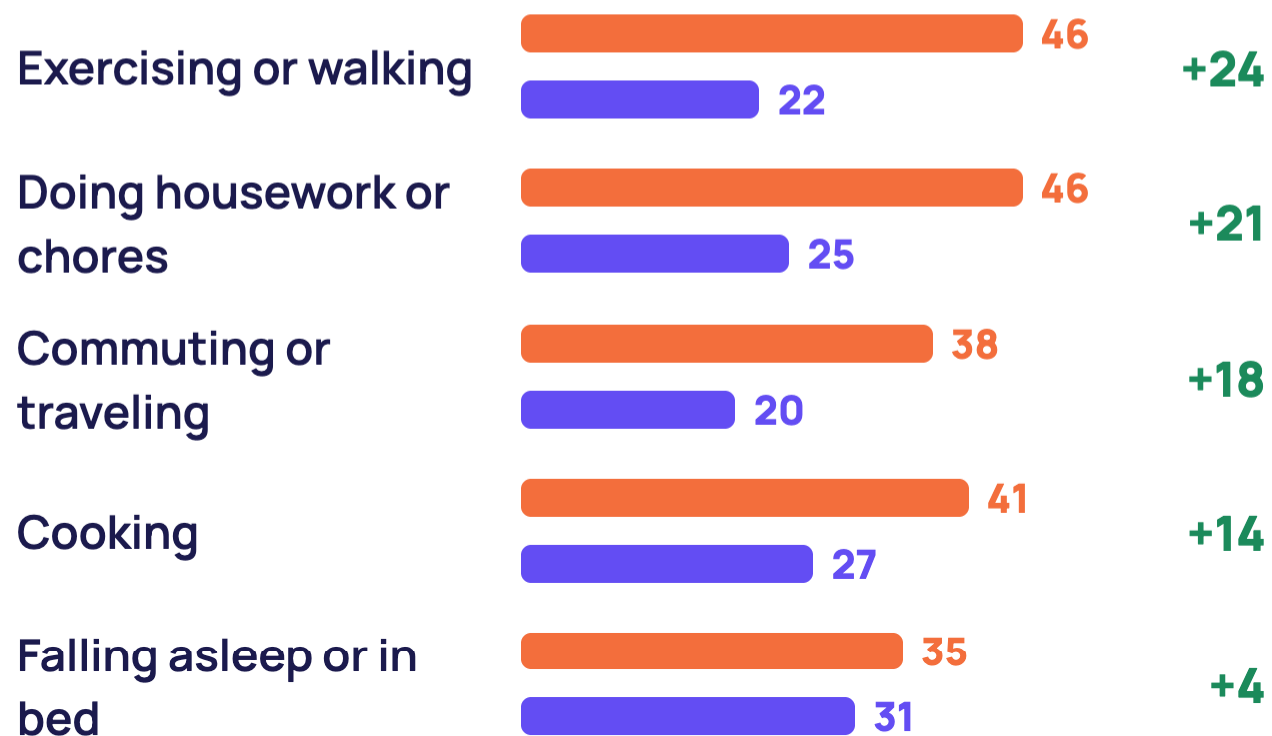
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What they're doing while consuming each

Audio Video

HANDS-BUSY / ON-THE-GO



LEAN-BACK / DEDICATED



Same people reported their context for both formats – the gap is within-person. · Multi-select.

Use the format during at least one hands-busy or on-the-go moment

78% **55%**

Audio

Video

Commuting, exercising, chores or cooking – the most repeated daily moments in the format.

The formats are complementary

Video still leads the lean-back moments – relaxing with dedicated attention (50 vs 39) and eating or drinking (42 vs 38). Each format owns a different part of the day.

Audio is the only podcast format that travels. A video-only buy goes dark during the commute, the workout, and the kitchen.

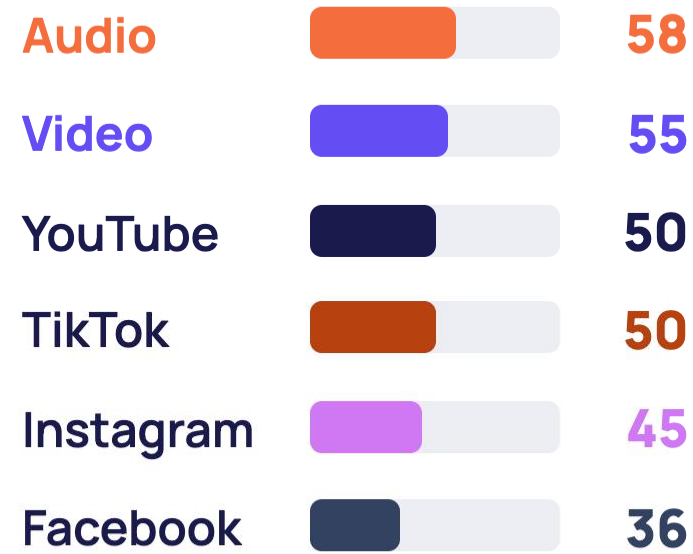
Audio Leads on Credibility

PRIMES

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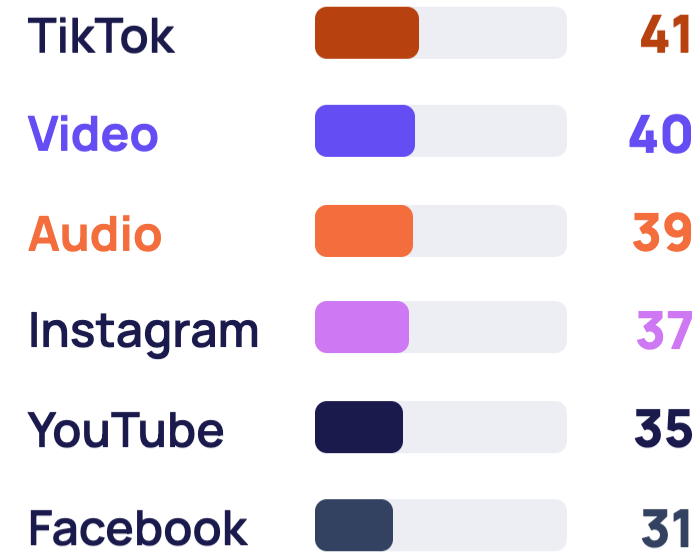
Accurate & factual

Top-2-Box



Never misled

Top-2-Box



Had a bad experience

LOWER =
BETTER

Top-2-Box



Audio Primes rate audio highest on factual accuracy (58%); its 21% bad-experience rate is among the lowest, tied with Video and YouTube. · Each metric among that platform's Primes

Episode Completion: Audio vs. Video

How often listeners finish an episode they start

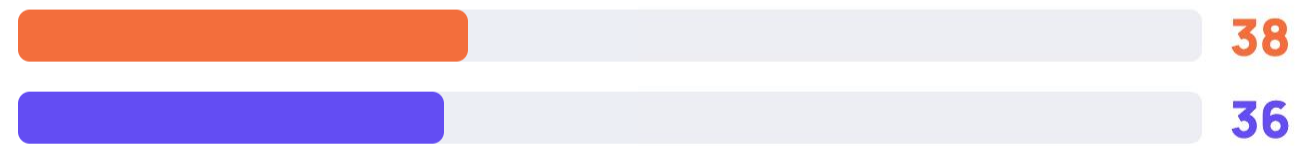
Audio · Video

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■ Audio ■ Video

Almost always



More than half the time



About half the time



Less than half · Almost never



71%

Audio finish “almost always + more than half”

69%

Video finish “almost always + more than half”

Audio and video are virtually identical on how often listeners finish episodes — committed behavior, not background noise. · Base: audio listeners video listeners

Least Skeptical of Ad Claims

“Question ad claims most or all of the time” · lower = better

PRIMES

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Audio Podcasts



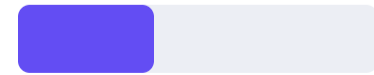
31

YouTube



37

Video Podcasts



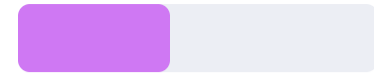
38

TikTok



41

Instagram



42

Facebook



42

X / Twitter



43

31%

of Audio Primes question ad claims most or all of the time

The lowest reflexive skepticism of any platform – versus 42% on Facebook.

Among each platform's Primes · sorted low-to-high because lower skepticism reads as a healthier ad environment.

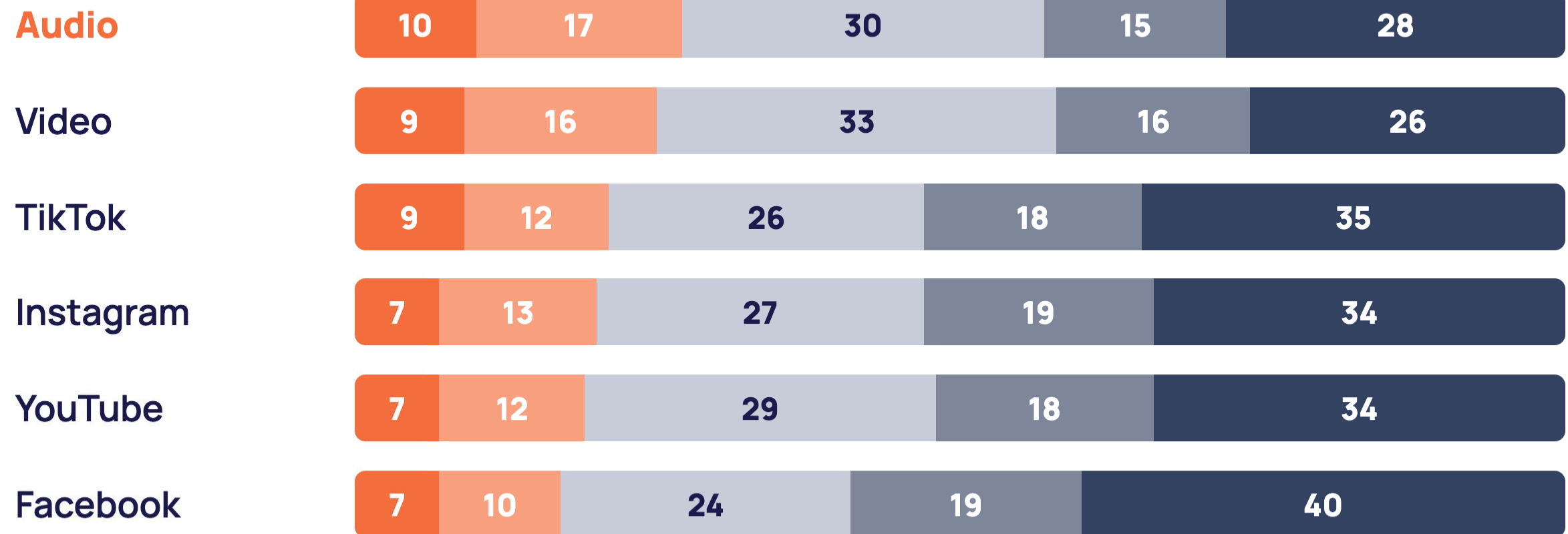
Perceived Creator Motivation

“Are creators motivated by money or by helping their audience?”

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Primarily helping
Somewhat helping
Equally
Somewhat money
Primarily money



Audio podcast creators are seen as the most genuinely motivated – 27% of Audio Primes say audio podcast creators are mostly or entirely motivated by helping their audience, the highest of any platform and well above Facebook’s 17%. · Among each platform’s Primes

Creator Trust & Preferred Ad Format

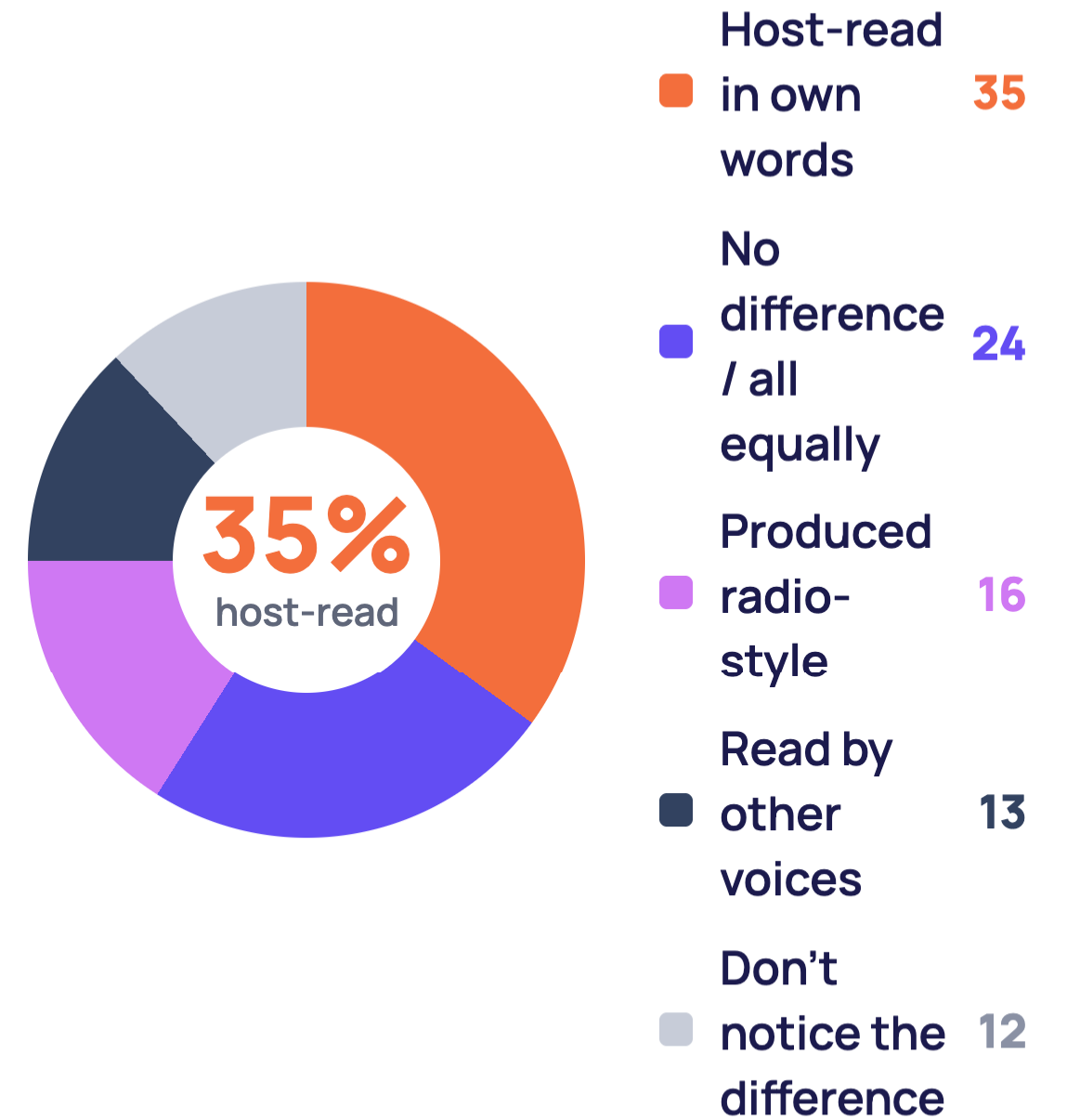
PRIMES

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Audio creator-trust dimensions Audio Primes

Part of a community	<input checked="" type="checkbox"/>	59
Strong connection	<input checked="" type="checkbox"/>	56
Follow across platforms	<input checked="" type="checkbox"/>	56
Transparent re sponsorships	<input checked="" type="checkbox"/>	53
Relevant expertise	<input checked="" type="checkbox"/>	48
Genuinely believe in products	<input checked="" type="checkbox"/>	45
Trust as much as friends	<input checked="" type="checkbox"/>	43

Preferred ad format in podcasts Single-select · podcast listeners



Host-read converts trust into ad value – **35%** prefer it; only **12%** don't notice the difference.

base: Audio Primes (T2B) · base: podcast listeners single-select

1

TERRITORY 1 · THE TRUST ENGINE

Audio podcasting builds the **deepest trust**, the most credible ad environment, and the **lowest rates of skepticism and disappointment**. It is the foundation on which the rest of the federation's advertising credibility rests.

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ESPN Podcasts



TERRITORY 2

VIDEO PODCASTING

The Deepening Layer

Visual attention intensifies trust and converts credibility into downstream action – the federation’s activation layer.

002

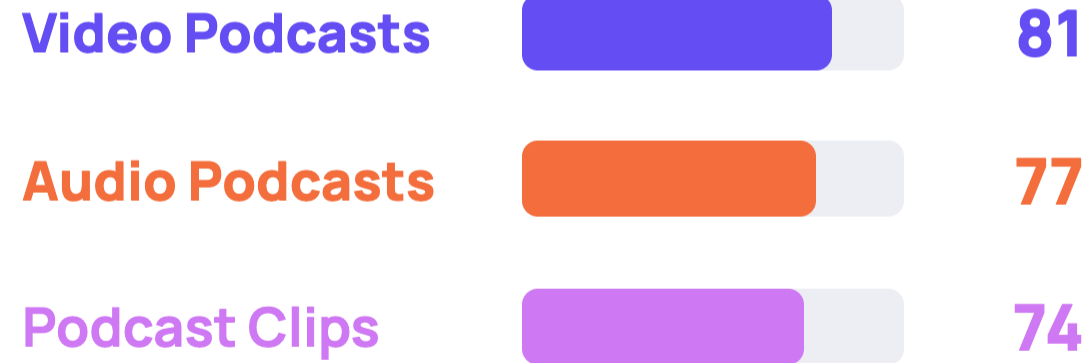
Video: Attention & Viewing Contexts

Video listeners

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Full + Mostly attentive, by format



Video commands the **highest dedicated attention** of any format.

Bases: Video · Audio · Clips

Top viewing contexts: Video



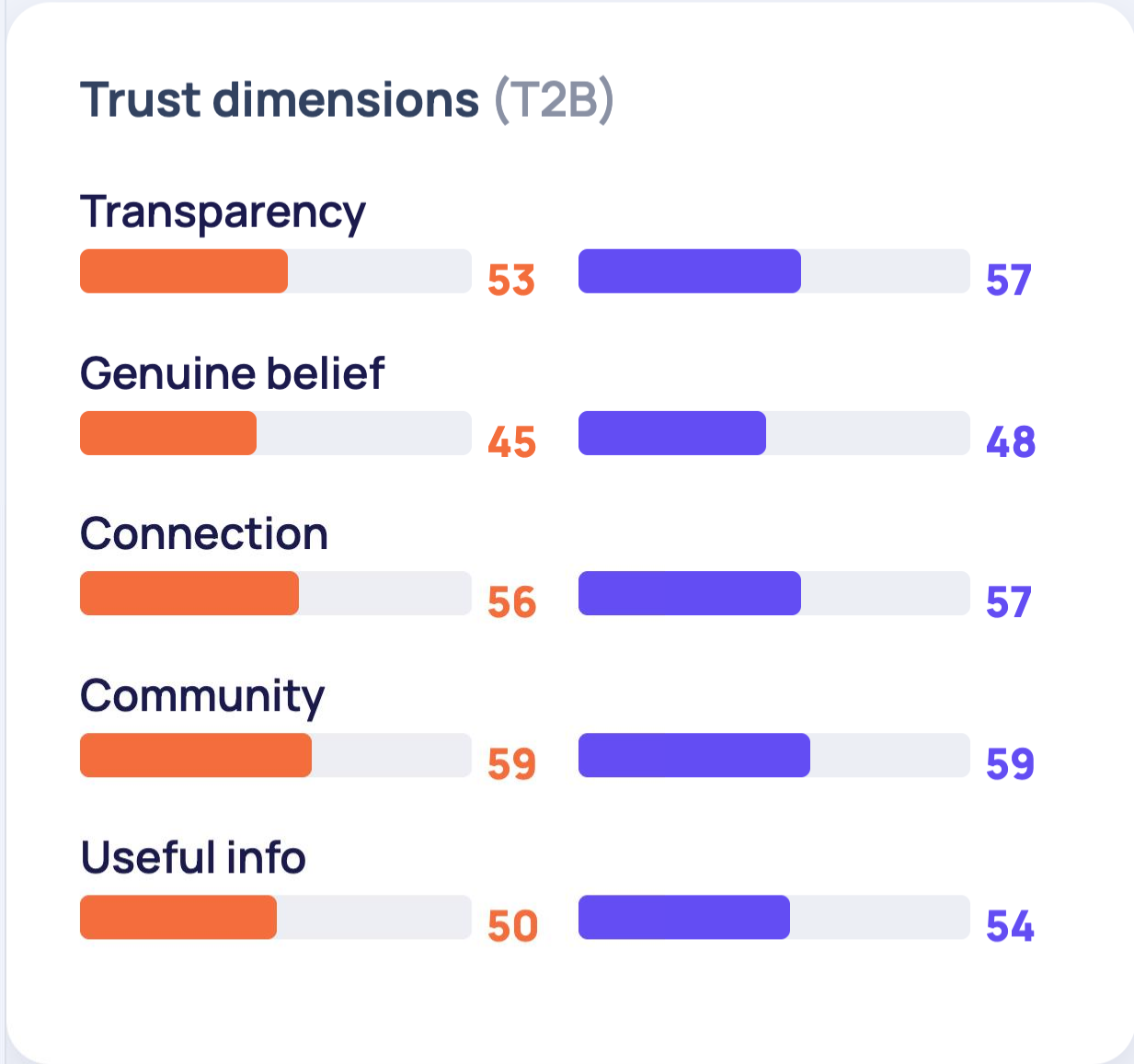
54% — “relaxing with dedicated attention” — is the highest single context in the study. · Base: video listeners · multi-select.

Trust & Post-Ad Actions: Audio vs. Video

PRIMES

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■ Audio ■ Video



Video matches audio on trust (often slightly exceeds it) and converts it into action at a modestly higher rate across every action. · Audio Primes Video Primes

Ad Experience: Video Podcasts vs. YouTube

Top-2-Box agreement

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■ Video Podcasts ■ YouTube

Authentic and natural



Relevant to me



Personalized to me **YouTube leads**



Useful information



Memorable



Non-disruptive



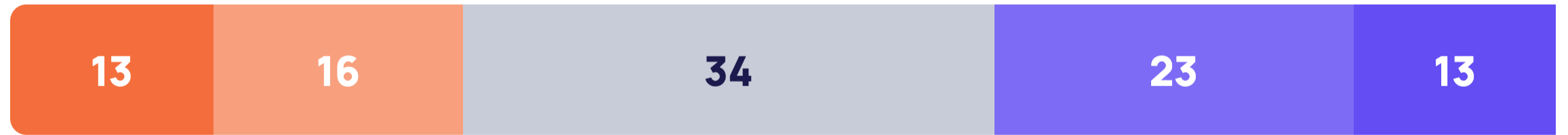
Video beats YouTube on five of six attributes despite YouTube's targeting advantage; YouTube edges only on personalization (40 vs 38). · Primes

Audio vs. Video Format Preference

Among people who consume both formats

Dual consumers

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Strongly prefer listening

Somewhat prefer listening

No preference / depends

Somewhat prefer watching

Strongly prefer watching

29%

Prefer audio

34%

No preference

37%

Prefer video

Not displacement – a complementary preference that varies by content and mood. · Base: dual consumers

2

TERRITORY 2 · THE DEEPENING LAYER

Video podcasting takes the trust built by the creator relationship and **intensifies it through visual attention**, converting consideration into behavior more efficiently than audio alone. It is the federation's **activation layer**.

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ESPN Podcasts



TERRITORY 3

CLIPS

The Discovery & Conversion Engine

Short-form social content recruits new audiences and reactivates existing ones — the top of the funnel.


03

TERRITORY 3 · CLIPS

Clip Consumption by Platform

“Always + Often” – % of those who watch podcast content on that platform

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89%
watch clips on ≥1 social platform at least sometimes

72%
do so often or always

Headline base: podcast listeners · per-platform bars are % of those who watch podcast content there

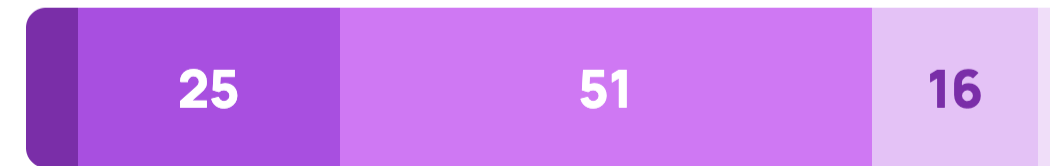
The Clip Conversion Funnel

Clip viewers

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“Clips lead me to watch a specific episode”



Always 5 Often 25 Sometimes 51
Rarely 16 Never 3

30%

often or always

81%

at least sometimes

“Clips lead me to become a regular listener”



Always 6 Often 27 Sometimes 51
Rarely 14 Never 2

33%

often or always

84%

at least sometimes

Clips feed discovery: ~33% often/always go on; 81-84% at least sometimes (mostly “sometimes”) – not an 80%+ conversion rate. · Base: clip viewers

How Listeners Identify a Clip

What signals there is a full episode behind the clip

Clip viewers

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Creator mentions the full episode	43
On-screen title about the full episode	43
“Seems like there’s more / missing”	41
I know the creator has a longer podcast	39
I’ve heard other full episodes	36
I’ve seen the episode the clip came from	29
Not sure	4

Base: clip viewers · multi-select may sum to >100%.

THE READ

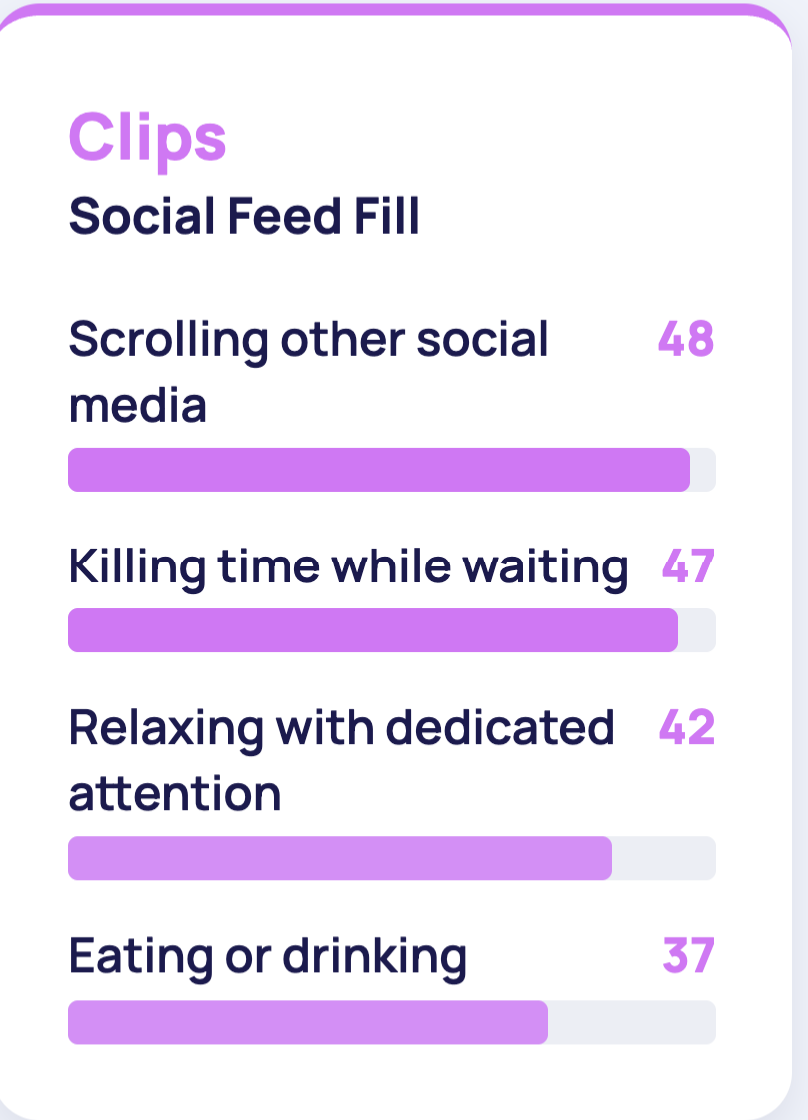
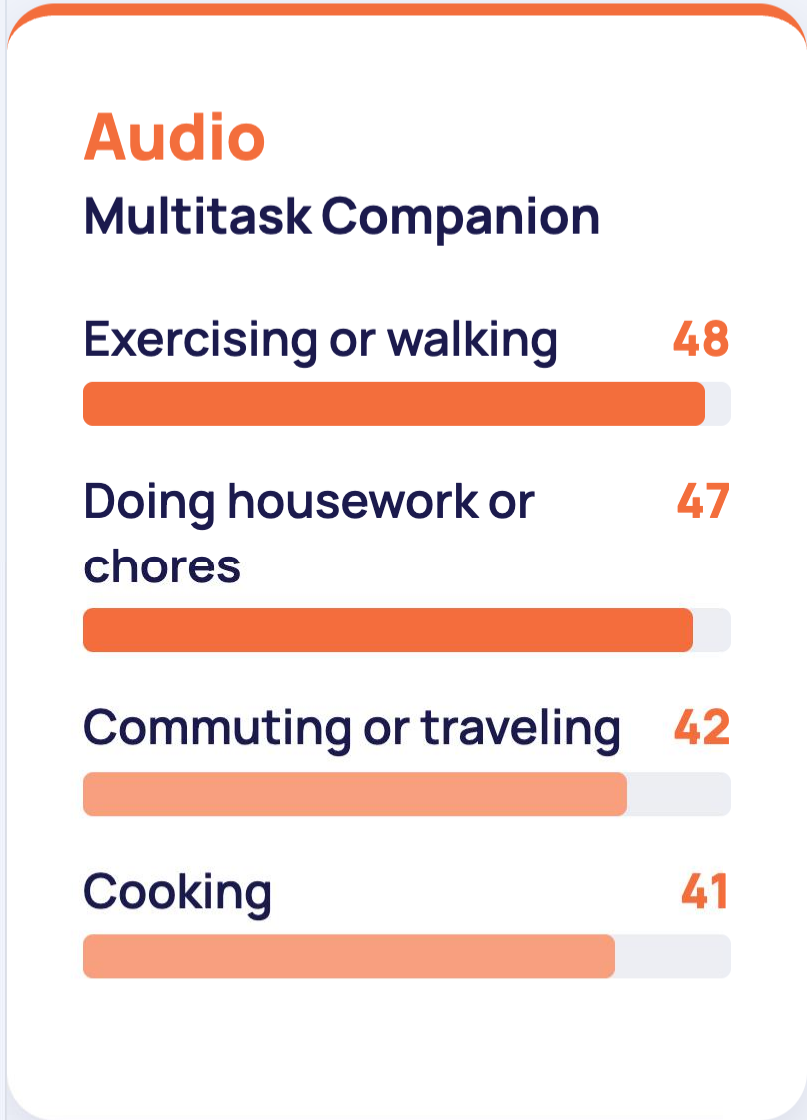
Design clips as entry points.

Clips convert best when they signal more exists – and make the full episode easy to find.

TERRITORY 3 · CLIPS

Each Format Captures a Different Moment of the Day

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Top contexts per format · Bases: Audio · Video · Clips · multi-select.

Attention Level by Format

Full distribution

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■ Full attention
■ Mostly paying attention
■ Split attention
■ Background

Audio Episodes



Video Episodes



Clips



Full + Mostly attentive: **Audio 77** **Video 81** **Clips 74**

Clip attention is only 3-7 points below full episodes – genuine engagement, not passive impressions.

3

TERRITORY 3 · THE DISCOVERY ENGINE

Clips are the **top of the funnel** – they live inside the social platforms where reach lives, capture attention in scroll contexts, and convert **passive awareness into active listening.**

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TERRITORY 4

SOCIAL PLATFORMS

The Distribution Infrastructure

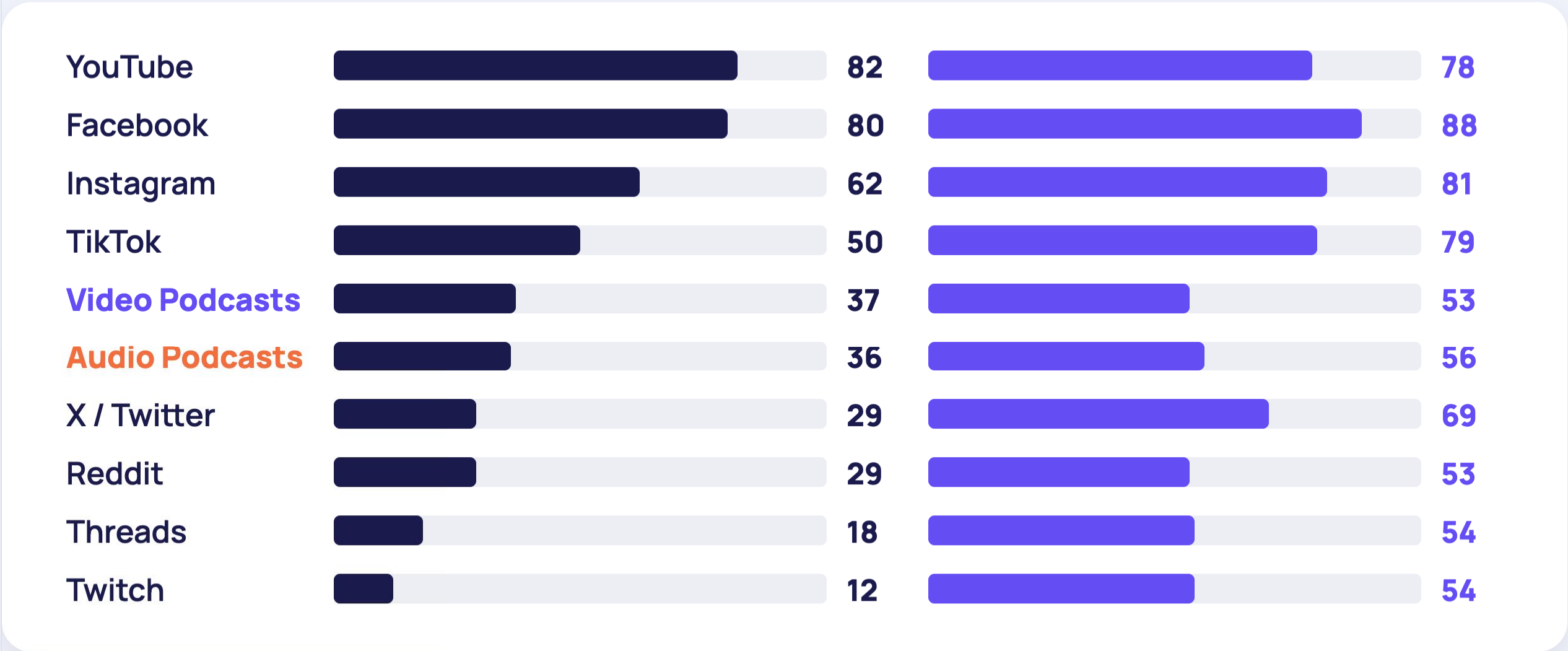
Reach, daily engagement, algorithmic scale. These platforms are not competitors to podcasting – they're the infrastructure it runs on.

04

Monthly Reach vs. Daily Engagement

■ Monthly reach
■ Daily (of monthly users)

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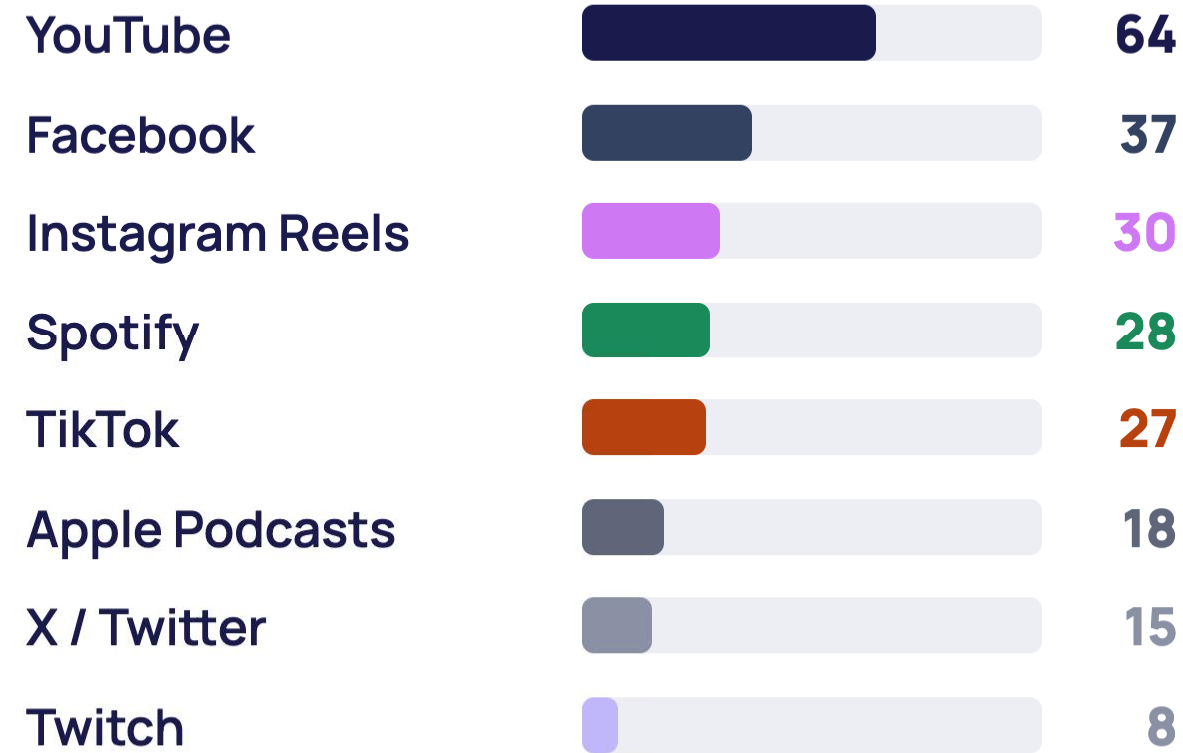


Monthly reach: % of · Daily: % of that platform's monthly users

Podcast Consumption by Platform & Ad Load

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Where podcast content is consumed —
Always + Often
Podcast listeners



YouTube ad-load perception

61%

of YouTube users say “too many ads” —
slightly + far too many.

% OF ALL RESPONDENTS

Far too many	28
Slightly too many	31
About right	29
Too few	5
Don't use	8

61% is among YouTube users; the distribution at right is % of all respondents. · base: podcast listeners

Facebook: Reach Strength vs. Trust Deficit

PRIMES (DEFICITS)

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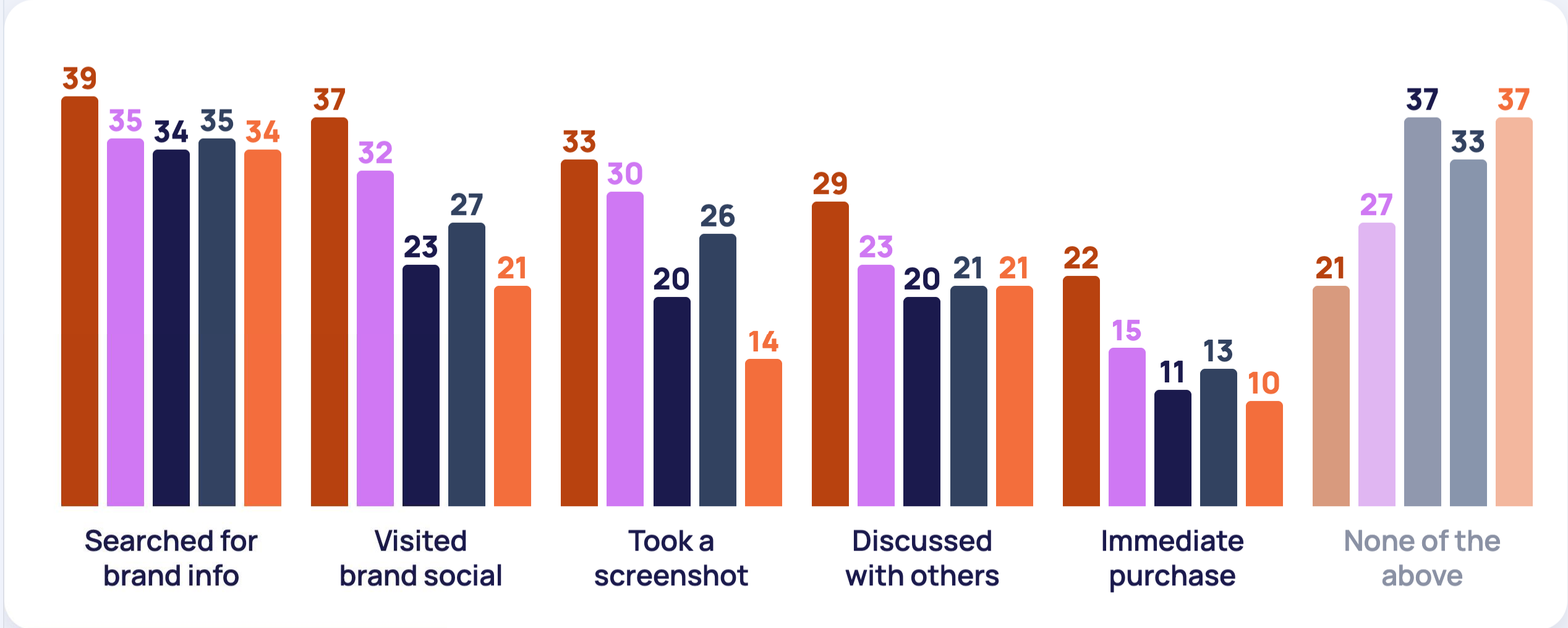


Role: distribution, social proof, community – best for retargeting and frequency, not first-touch persuasion. · Deficits among Facebook Primes

Post-Ad Actions by Platform

■ TikTok
 ■ Instagram
 ■ YouTube
■ Facebook
 ■ Audio

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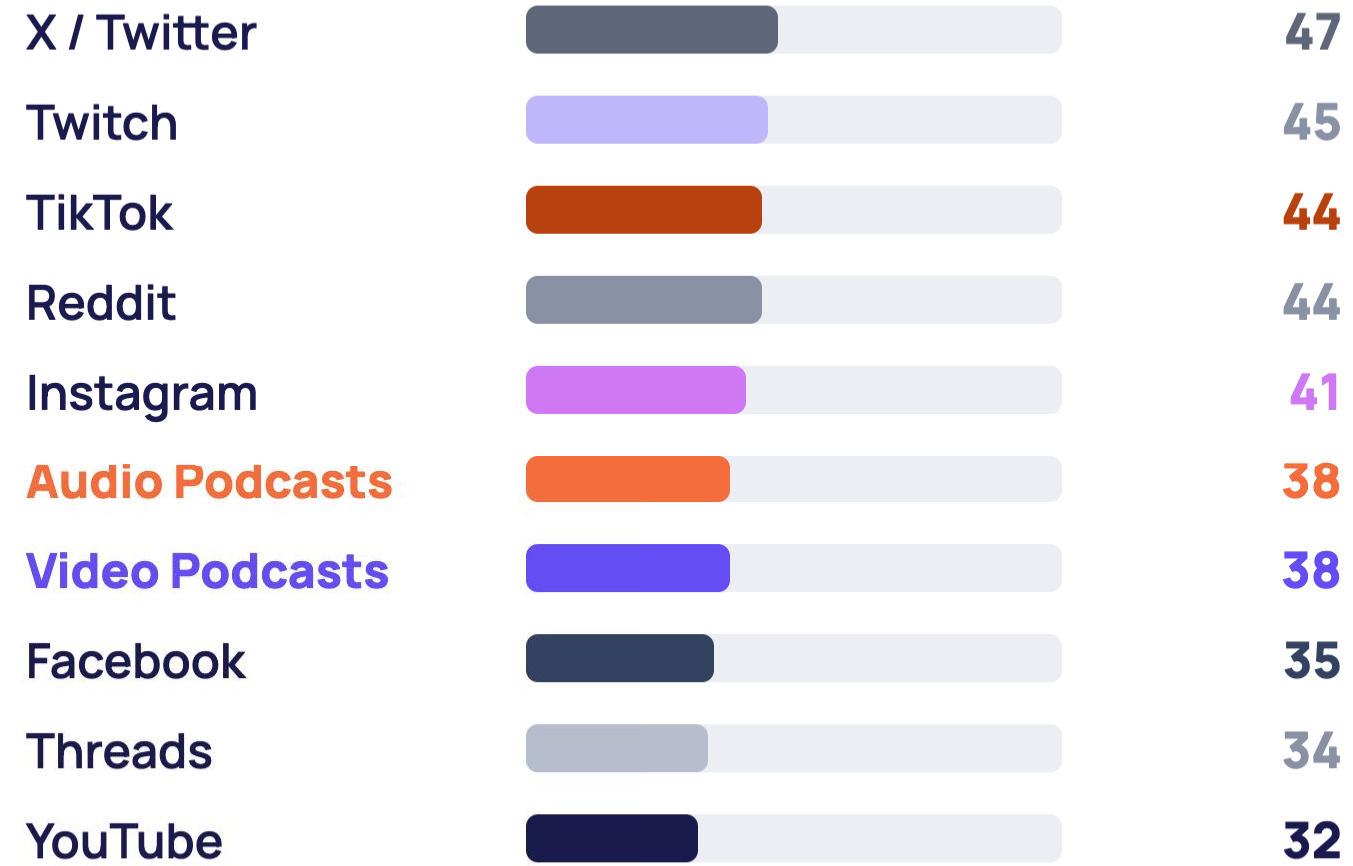
TikTok: lowest “none of the above” (21%) and highest immediate purchase (22%). · % of each platform’s Primes

Ad Experience: Non-Disruptive

“Ads are non-disruptive” – Top-2-Box agreement

PRIMES

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Higher = more agree ads are non-disruptive. · Among each platform's Primes

49%

of YouTube Primes actively disagree that YouTube ads are non-disruptive

The interruption model is the structural weakness that creator-integrated podcast ads avoid.

Platform Mini-Profiles

Trust/ad = Primes · reach = full sample

Instagram

Reach
62% mo / 81% daily

Ad relevance
55% agree

Ad personalization
53% agree

Clips (Reels)
58% always/often

Role: Mid-funnel reinforcement, lifestyle alignment

X / Twitter

Reach
29% mo / 69% daily

Factual accuracy
49% agree

Clip consumption
48% always/often

Rec trust (4-5 of 5)
42%

Role: Real-time amplification – news / sports / politics

Reddit & Threads

Reddit reach
29%

Reddit “none” ad actions
47%

Threads reach
18%

Threads ad awareness
61%

Role: Not meaningful ad surfaces today

Twitch small base


Creator transparency
65%

Trust creators as friends
54%

Connection
61%

Role: Ceiling signal for parasocial engagement at micro-scale

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Trust/ad metrics among each platform's Primes; reach/daily are full-sample monthly. Twitch – interpret with caution.

TERRITORY 5

NEWSLETTERS


The Re-engagement Channel

Owned-audience relationships independent of platform algorithms
– the backstop against algorithm change.

05

Newsletter Subscription & Conversion

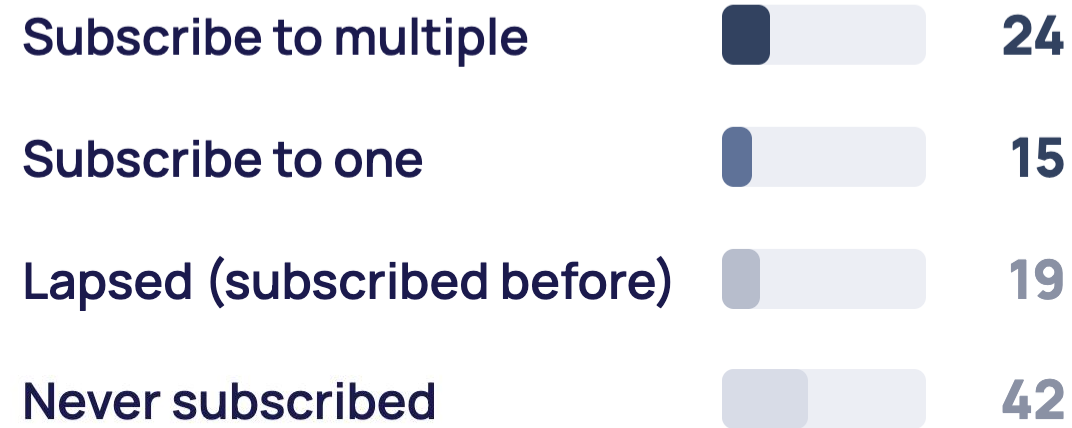
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Newsletter subscription status

Podcast listeners



39% currently subscribe to ≥ 1 newsletter

“Newsletters lead me to listen to an episode”

Subscribers




87% at least sometimes lead to listening – the owned-media backstop

Newsletters serve existing audiences rather than generating discovery. · base: podcast listeners · base: subscribers

The Newsletter Growth Opportunity

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Addressable audience

Podcast listeners



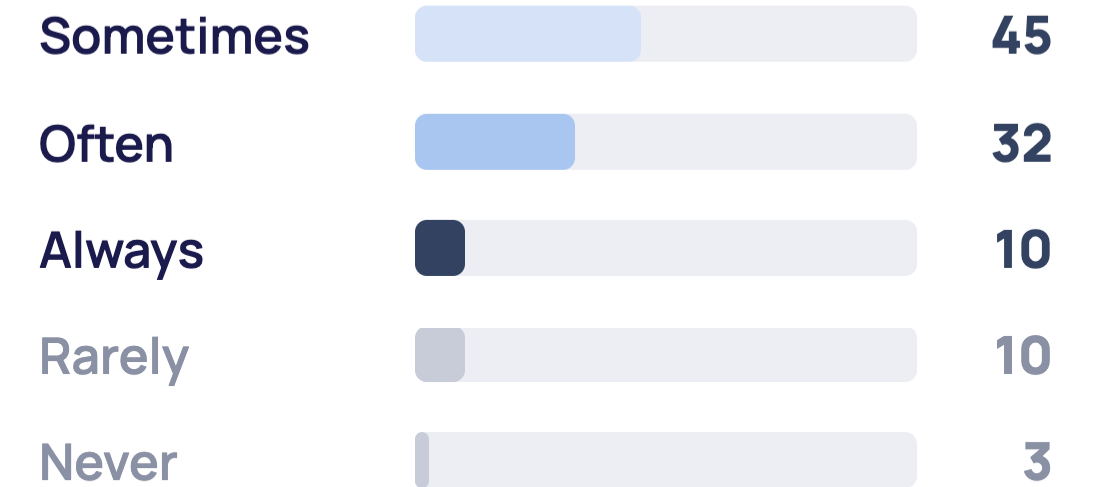
■ Never subscribed 42 ■ Lapsed 19
■ Subscribe to multiple 24 ■ Subscribe to one 15

61% are lapsed or never-subscribed – a large untapped owned-audience opportunity

base: podcast listeners · base: subscribers

Conversion to listening

Subscribers

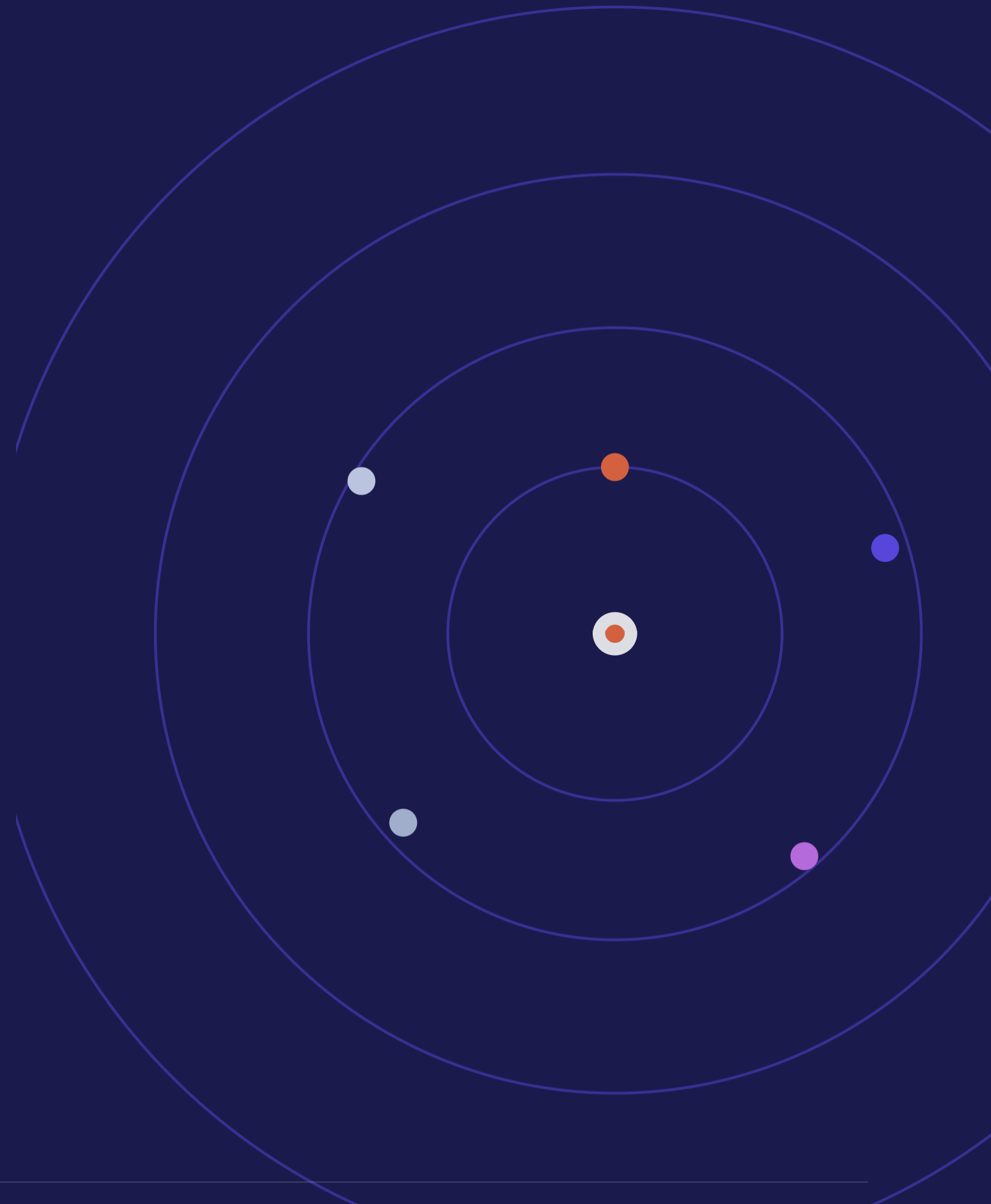


Existing subscribers convert at **87%** (at least sometimes)

BRINGING IT TOGETHER

HOW THE ATLAS CONNECTS

The Advertiser's Map



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THE ADVERTISER'S MAP

Host Allegiance: The Creator Is the Moat

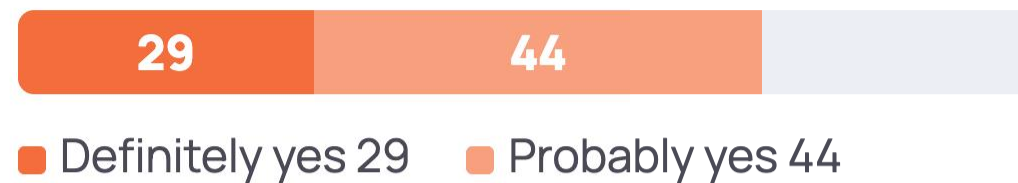
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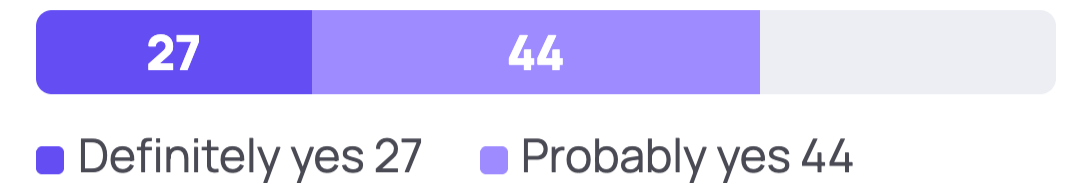
73%

would follow their host from audio → video



71%

would follow their host from long-form → short clips



base: podcast listeners

The audience belongs to the creator, not the platform.

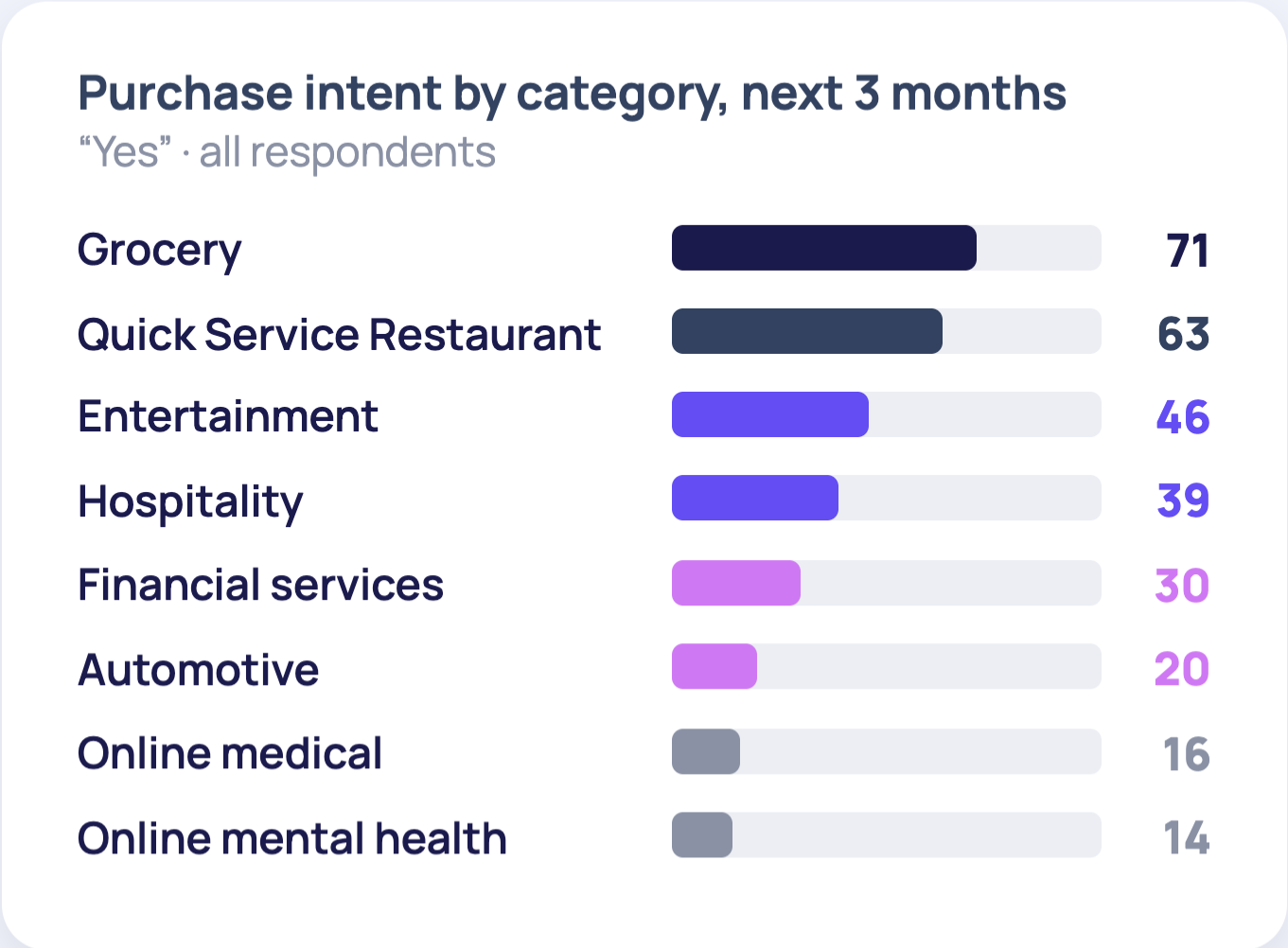
THE ADVERTISER'S MAP

The Advertising Economy of the Ecosystem

No single territory captures the full value — an advertiser who buys one piece leaves value on the table.

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46% of ad-supported-platform users have ever purchased from a creator's ad recommendation

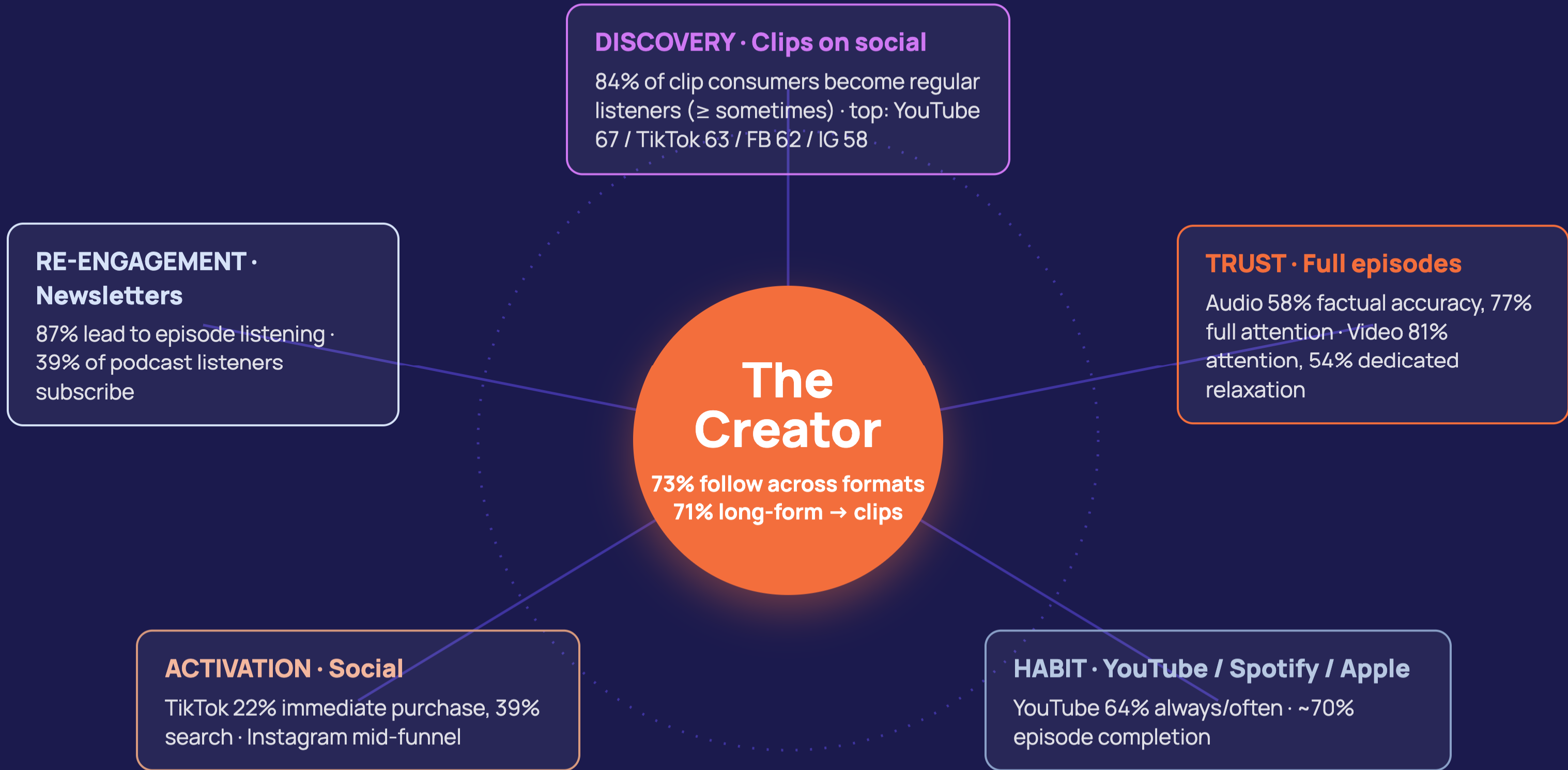


base · base podcast purchasers · base

Territory Scorecard

TERRITORY	BEST AT	WEAKEST AT	USE FOR
Audio Podcasts	Trust, credibility, low skepticism, lowest bad-experience rate	Perceived relevance/personalization, immediate purchase	Brand-building, endorsement, long-consideration products
Video Podcasts	Trust + visual activation combined, highest attention	Same limits as audio, to a lesser degree	Product demonstration, visual storytelling, mid/lower funnel
Clips	Discovery / funnel entry; 84% convert to regular listener (≥ sometimes)	Not a standalone ad environment	Audience growth, top-of-funnel awareness, retargeting fuel
YouTube	Scale — 64% of podcast listeners consume podcast content there	Ad-load perception — 63% of users say too many	Reach & frequency against podcast content
TikTok	Rapid behavioral activation, lowest “none of the above” (21%)	Lower trust/credibility vs podcasts	Immediate search, impulse purchase, social engagement
Instagram	Mid-funnel reinforcement, lifestyle alignment	Moderate trust metrics	Retargeting, visual brand storytelling, community-building
Facebook	Mass reach — 80% monthly / 88% daily	Lowest trust, credibility, authenticity in study	Frequency, retargeting, community-group distribution
Newsletters	Owned-audience re-engagement — 87% lead to episode	Not a discovery mechanism	Retention, episode promotion, direct response to existing audience

The Creator Ecosystem Flow



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THE PODCAST ATLAS 2026

Thank you.

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