

The Canadian Podcast Listener

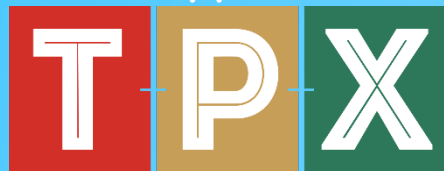
Spring 2020 Update

Summary Report



SignalHill
Insights

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THE PODCAST EXCHANGE



Why a Spring 2020 Update?

The Joe Rogan Spotify deal

for \$100 million, and the pending exclusivity of *The Joe Rogan Experience* on Spotify, has huge implications.

What does it mean for Joe Rogan's outsized audience— with more than three times the reach of the #2 podcast in The Canadian Podcast Listener 2019?

More important, what kind of impact can we expect on podcast platforms once Spotify secures audio and video exclusivity by the end of the year?

Survey Details

- Brief online survey
- Total sample of 590 past-year podcast listeners, aged 18+
- Email invites sent to representative national sample on MARU Voice Canada
- May 27-28, 2020

Apple's hold as a dominant podcast platform slipping

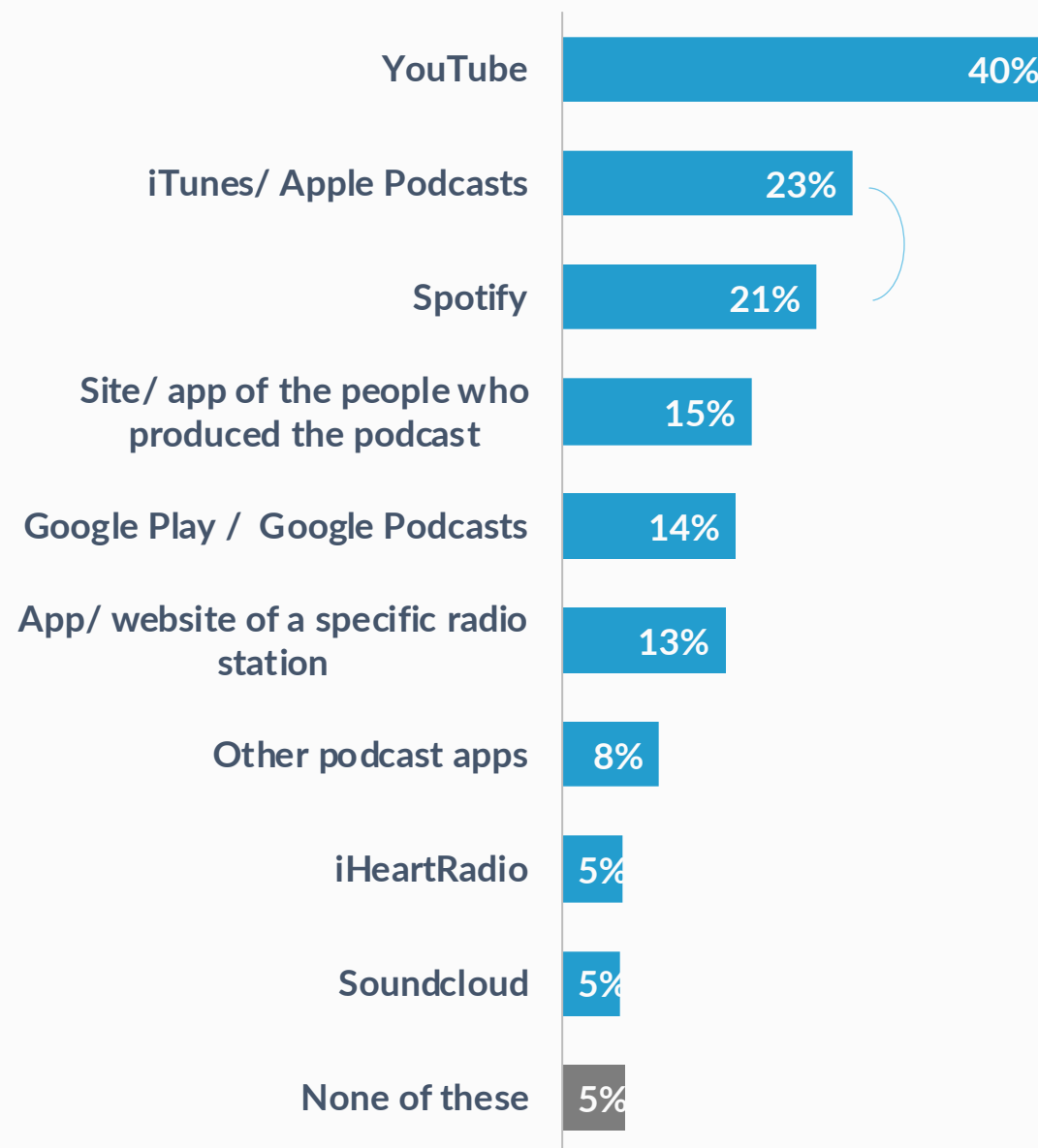
Reflecting what we saw in The Canadian Podcast Listener 2019, YouTube ranks as the #1 platform where past-year listeners frequently access podcasts. (Increased use of laptops/desktops during sheltering could be influencing this.)

More striking is the growth of Spotify vs. Apple, with the two platforms now nearly tied as a frequently used podcast platform. Among past week podcast listeners, Apple has a wider but still slender margin of 28%-22%.



Source: The Canadian Podcast Listener, Spring 2020 Update
Which of these platforms do you use most often to access podcasts? (multiple selections accepted)
Base: Canadians, aged 18+, listened past year (May 2020 n = 590)

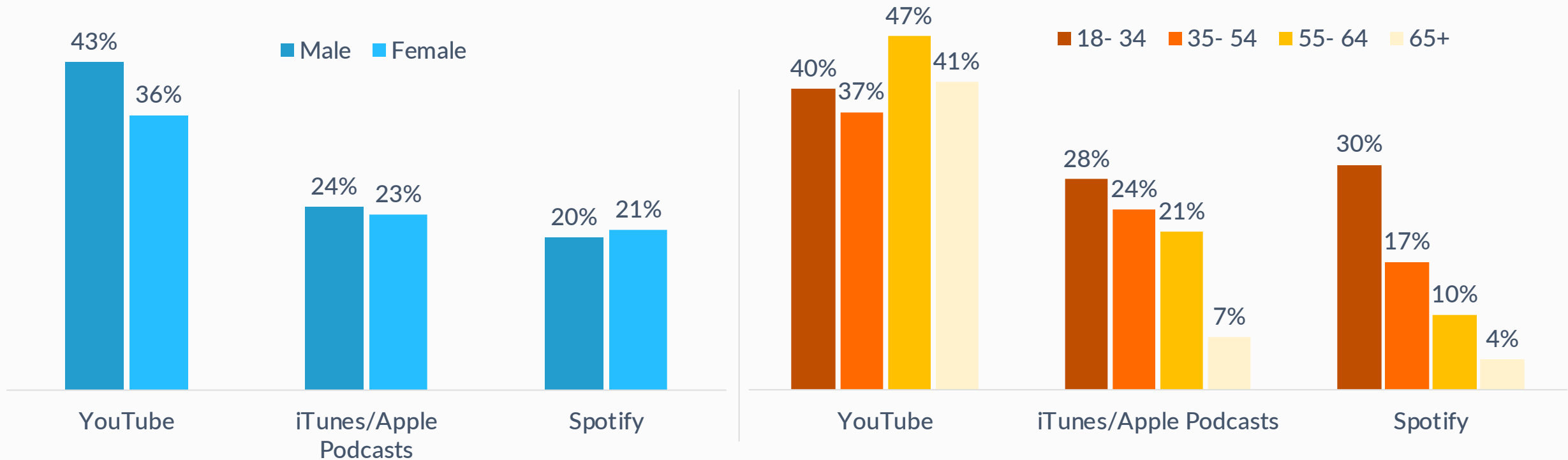
Platforms used most often to access podcasts



Spotify leads Apple among A18-34

Among podcast listeners aged 18-34, Spotify is more likely than Apple Podcasts/iTunes to be a platform they use frequently. Meanwhile, men are more likely than women to say YouTube is one of the platforms they use the most for podcasts.

Platforms used most often to access podcasts



Source: The Canadian Podcast Listener, Spring 2020 Update

Which of these platforms do you use most often to access podcasts?

Base: Canadians, aged 18+, listened past year (May 2020 n = 590), (Men (n=302), Women (n=288), 18-34 (n=231), 35-54 (n=215), 55-64 (n=62), 65+ (n=82))

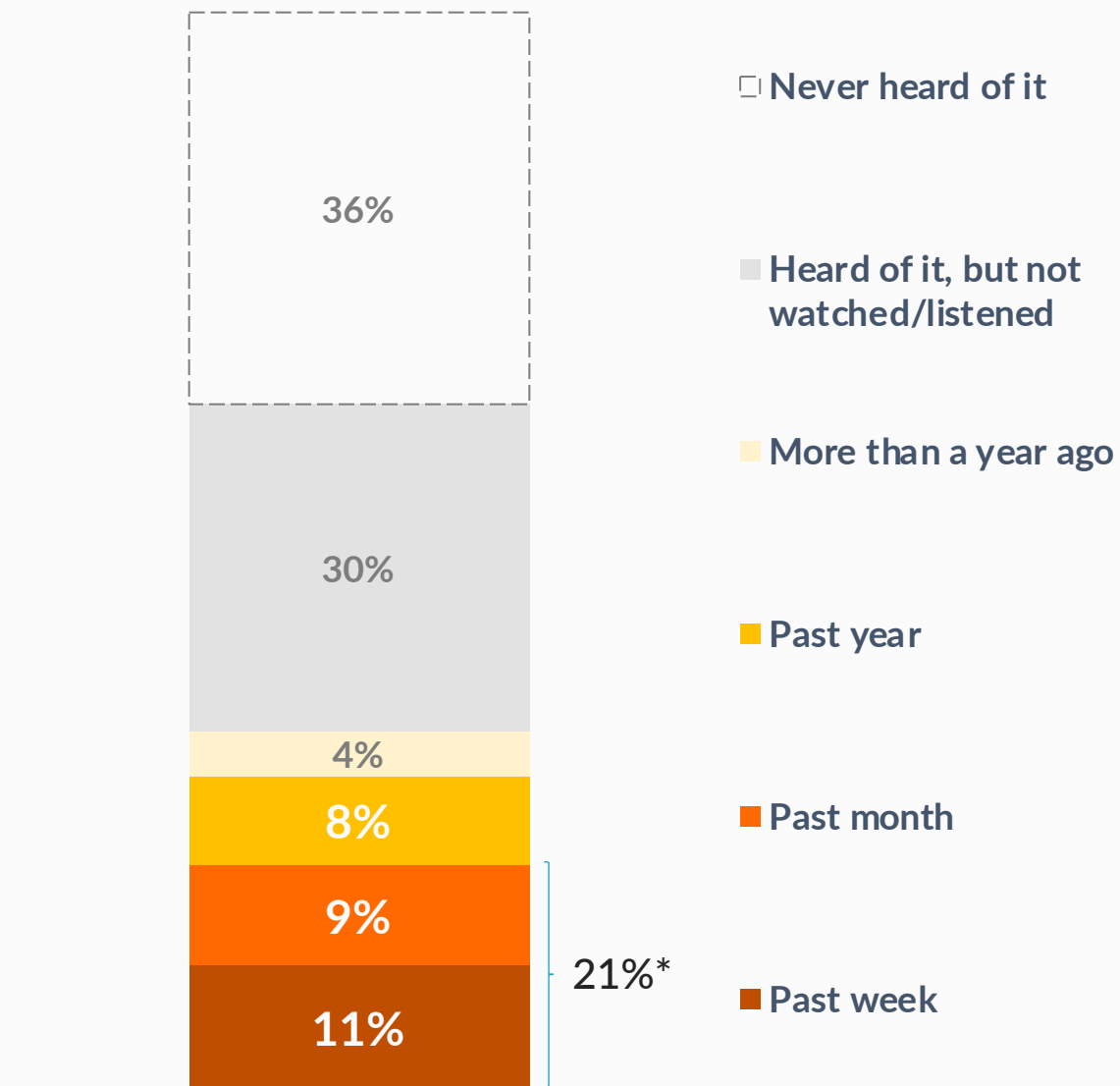
More than 1-in-5 past-year podcast listeners watched or listened to *The Joe Rogan Experience* in the past month.

With recent sampling no doubt enhanced by news of the \$100 million deal with Spotify, 21% of past-year podcast listeners say they listened to JRE in the previous month. That translates to an astonishing 8% of the Canadian population.

Yet, even with all the buzz around the megadeal, more than a third of past-year podcast listeners say they have never heard of the show.



Source: The Canadian Podcast Listener, Spring 2020 Update
Which of the following would best describe your experience, if any, with The Joe Rogan Experience podcast?
Base: Canadians, aged 18+, listened past year (May 2020 n = 590)

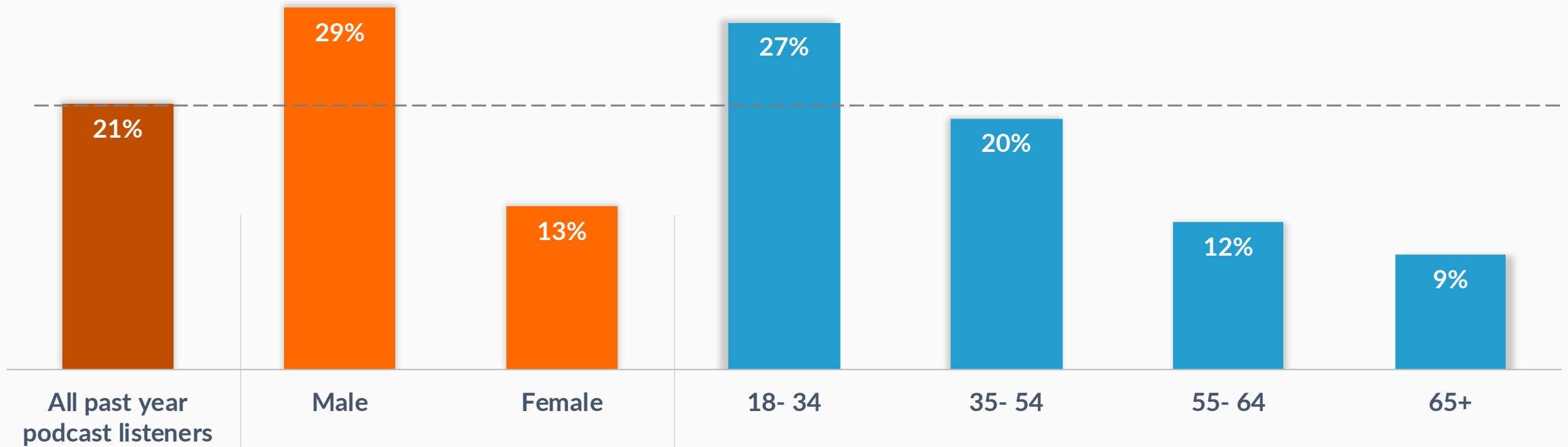


Experience with JRE

*results do not appear to add to 21% due to rounding

Joe Rogan still skews younger and male.

Listened to or watched *JRE* in Past Month



Source: The Canadian Podcast Listener, Spring 2020 Update

Which of the following would best describe your experience, if any, with The Joe Rogan Experience podcast?

Base: Canadians, aged 18+, listened past year (May 2020 n = 590), (Men (n=302), Women (n=288), 18-34 (n=231), 35-54 (n=215), 55-64 (n=62), 65+ (n=82))

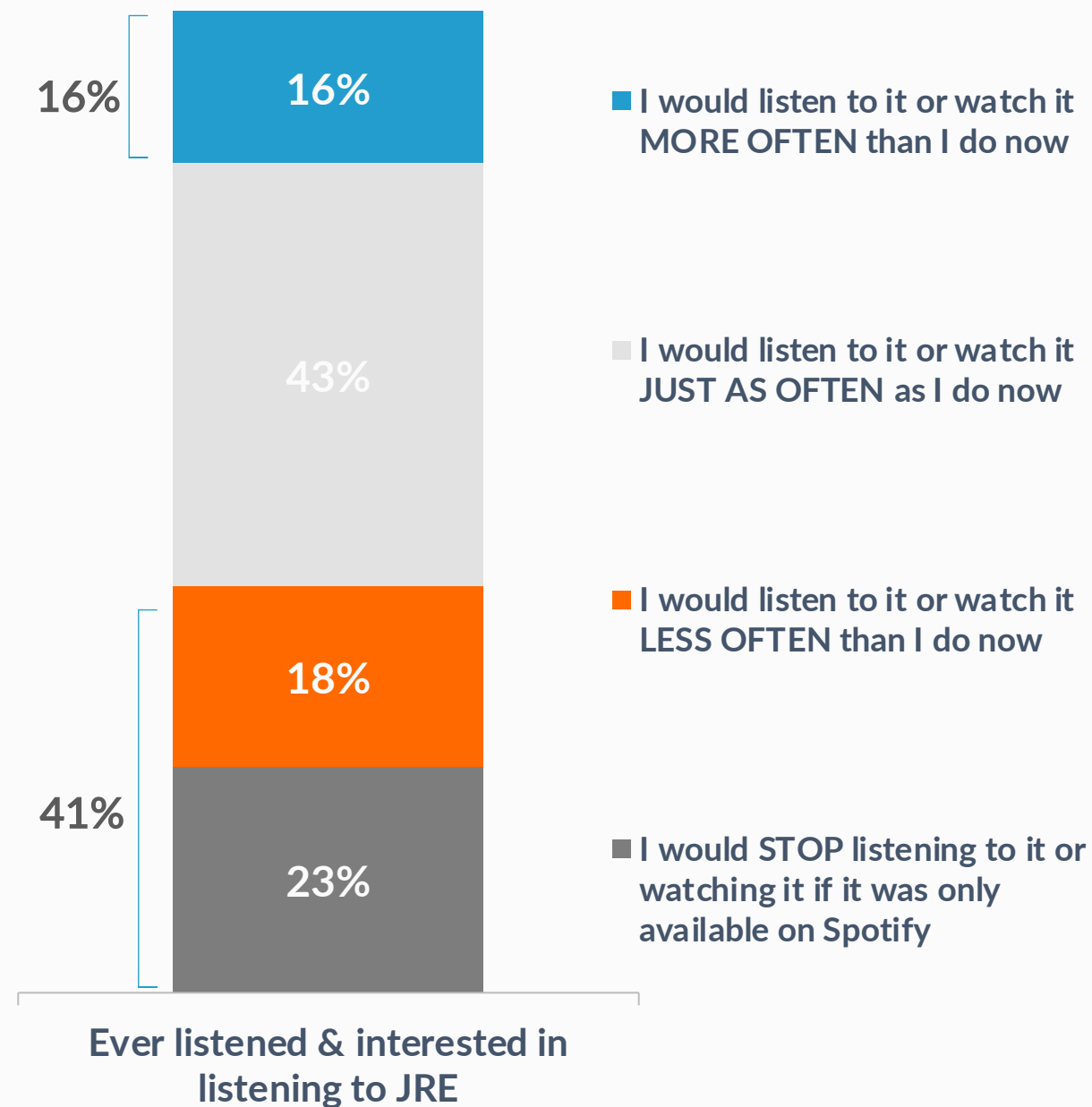
Spotify exclusivity likely to shrink Joe Rogan's huge listener base

Though still something of a hypothetical scenario when Spotify exercises its exclusivity at the end of the year, listeners to *The Joe Rogan Experience* are much more likely to say they would listen/watch “less” (18%) or “stop” listening/watching altogether (23%) than access the show “more” often (16%).

Source: The Canadian Podcast Listener, Spring 2020 Update
Joe Rogan has recently signed a deal worth over \$100 million that would make his show, *The Joe Rogan Experience*, exclusive to Spotify, both the audio and video versions. How would making his show available ONLY on Spotify affect how often you would listen to or watch *The Joe Rogan Experience*? Base: Canadians, aged 18+, ever listened / Interested in JRE (May 2020 n = 166)



Expected impact of Spotify exclusivity on listening to JRE

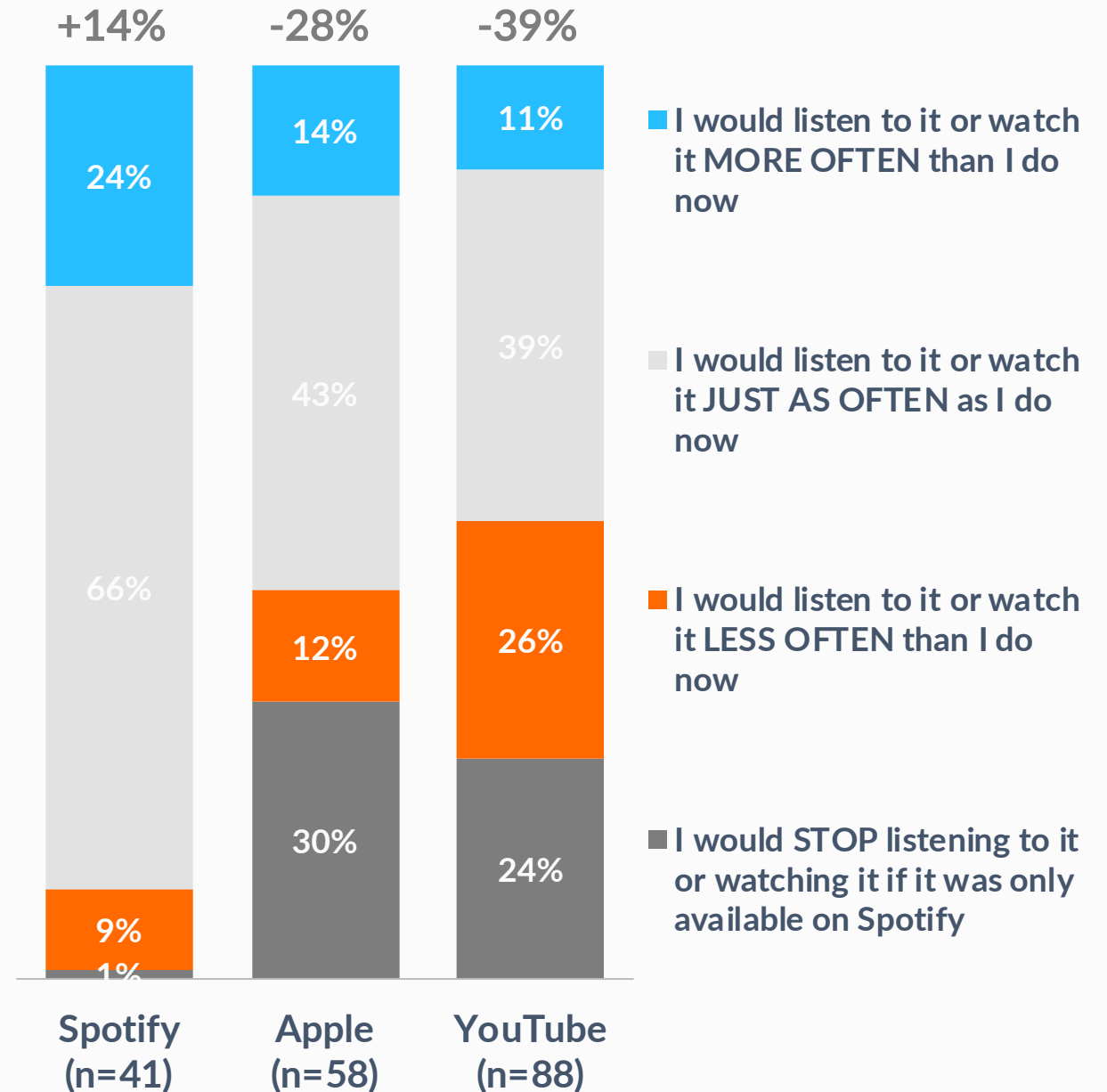


More potential JRE listening from Spotify users, less from YouTube and Apple

Audience loss is likely to be steepest among listeners who frequently access their podcasts on YouTube, with fully half saying they will either listen/watch less often or stop listening/watching altogether, for a net impact of -39%.

Joe Rogan listeners who currently access podcasts frequently on Spotify, where the podcast remains unavailable until September 1, are not surprisingly most likely to say they would listen more often.

Net impact of Spotify exclusivity, by platforms used most often



Source: The Canadian Podcast Listener, Spring 2020 Update
 Joe Rogan has recently signed a deal worth over USD \$100 million that will eventually make his show, The Joe Rogan Experience, exclusive to Spotify, both the audio and video versions. How would making his show available ONLY on Spotify affect how often you would listen to or watch The Joe Rogan Experience? Base: Canadians, aged 18+, ever listened / Interested in JRE, Spotify (n = 41), YouTube (n=88), Apple (n=58)



Takeaways

- **Spotify is gaining ground on Apple as a podcast platform.** YouTube remains the most widely used platform for podcast content, with Apple and Spotify now in a close race for 2nd and 3rd. Spotify now leads Apple among 18-34 podcast listeners.
- **Joe Rogan delivers massive reach among Canadian podcast listeners.** More than 20% of past-year podcast listeners report having listened or watched an episode of *The Joe Rogan Experience* in the past month, translating to a remarkable 8% of all Canadian adults.
- **The \$100m deal giving Spotify exclusivity will have a negative impact on that reach.** Though there are strategic benefits beyond reach for Spotify, many listeners on other platforms will listen less often. Notably, half of the JRE listeners who frequently access YouTube for podcasts say they will listen/watch the show less often or stop altogether.

Special appreciation to our primary sponsor for their support:

This Summary provides select findings from a CPL 2020 Spring Update survey.

The full 2020 study is slated to field in September 2020. Paid subscribers will receive an in-depth report on podcast platforms, discovery, listener behaviour, motivations and more. A subscription also opens the door to:

- The Canadian Podcast Chart—an online dashboard of podcasts listened to, including demo, genre and publisher
- In-person presentation of the study
- Detailed data tables
- Sponsor credit on website and report
- Membership in the Client Advisory Board, helping to move Canada's podcast industry forward

For more information, please visit:

canadianpodcastlistener.ca



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