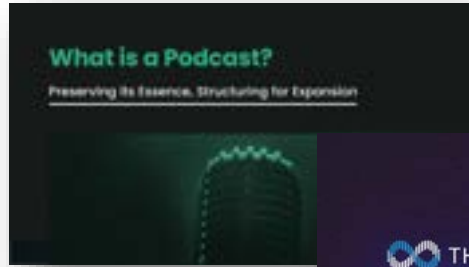




2025

Top **Ten Findings**

Edison Research is part of SSRS



#10

Video is redefining the podcast landscape

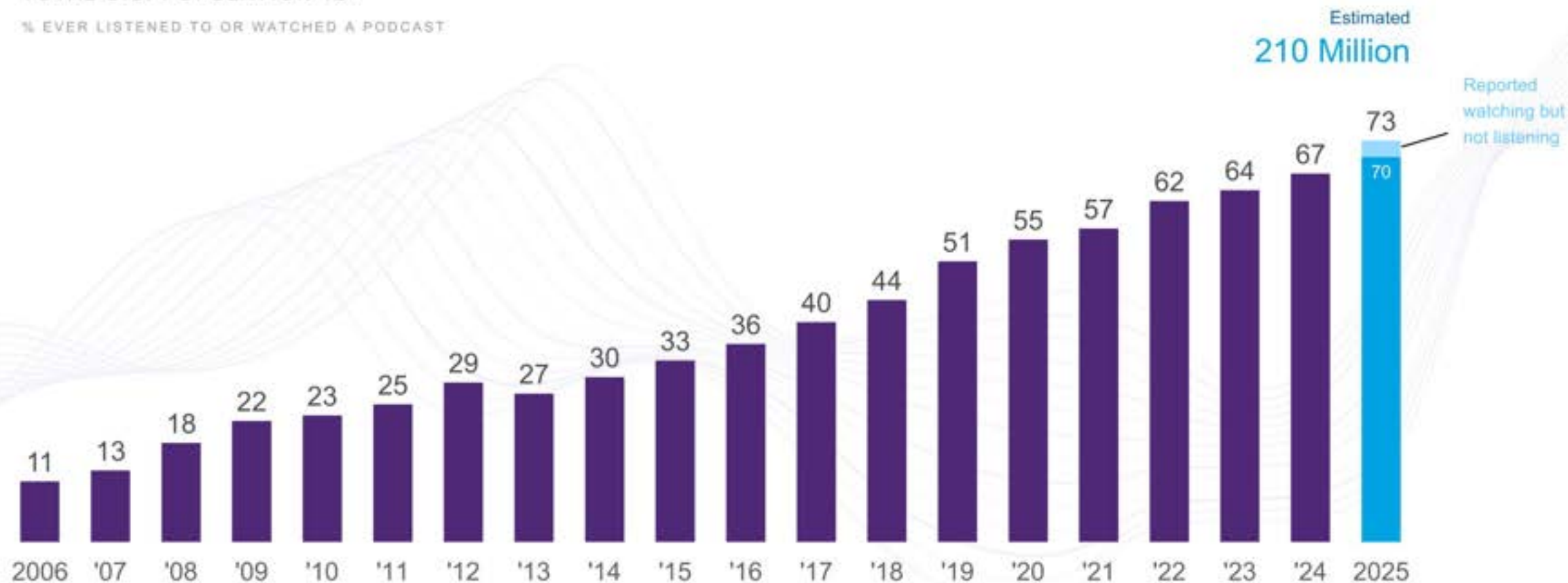
Sources: The Infinite Dial; *What is a Podcast?*



Ever Consumed a Podcast

TOTAL U.S. POPULATION 12+

% EVER LISTENED TO OR WATCHED A PODCAST



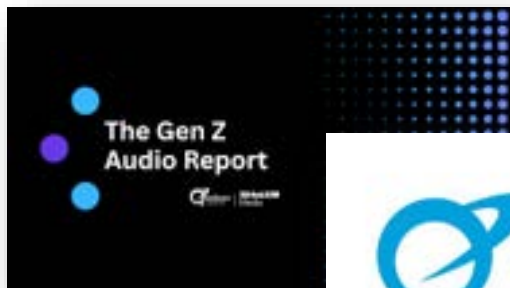
2025: Listened to and/or watched podcasts

What is a Podcast?

Preserving its Essence, Structuring for Expansion

52% of Americans 12+ consider
YouTube-only discussion
videos to be podcasts

Source: *What is a Podcast?* from Oxford Road and Edison Research



#9

YouTube is the top platform for podcast consumption and discovery for Gen Z

Sources: The Gen Z Podcast Report with SiriusXM Media; Edison Podcast Metrics



Service used most often to listen to podcasts

U.S. Weekly Podcast Consumers | Age 13+ | Q1 2025



YouTube
32%



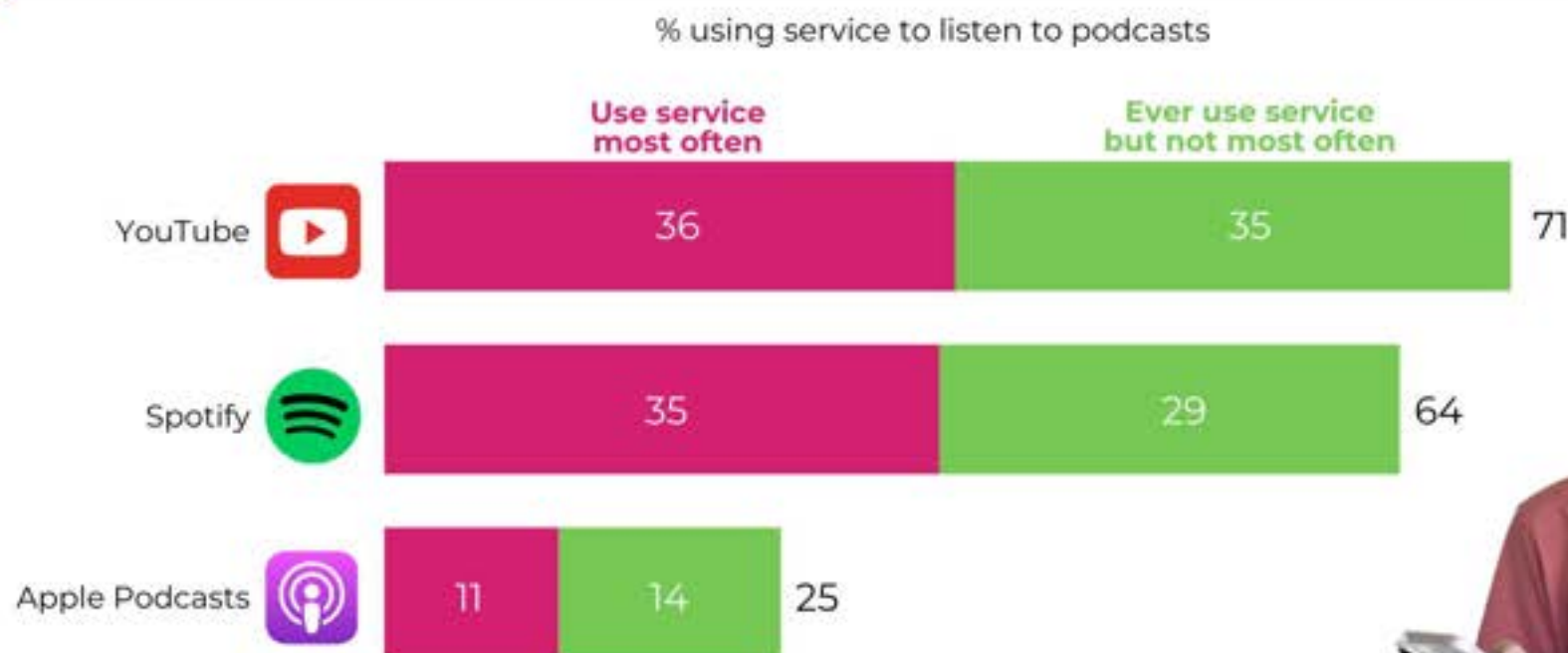
Spotify
25%



Apple Podcasts
15%

Services Gen Z Uses to Listen to Podcasts

Base: Weekly podcast listeners age 13-29



How The Study Was Conducted: Edison Podcast Metrics are based upon online surveys of weekly podcast consumers in the United States. Q4 2024 data are of 5,163 weekly podcast listeners 13+ and 1,568 aged 13-29. Interviews were conducted continuously throughout the quarter in English and Spanish. Data weighted using The Infinite Dial from Edison Research.

How Gen Z Discovers Podcasts Most Often

U.S. Population 13-24

Base: Listened to/watched podcasts in the last month



Searching on
YouTube
28%

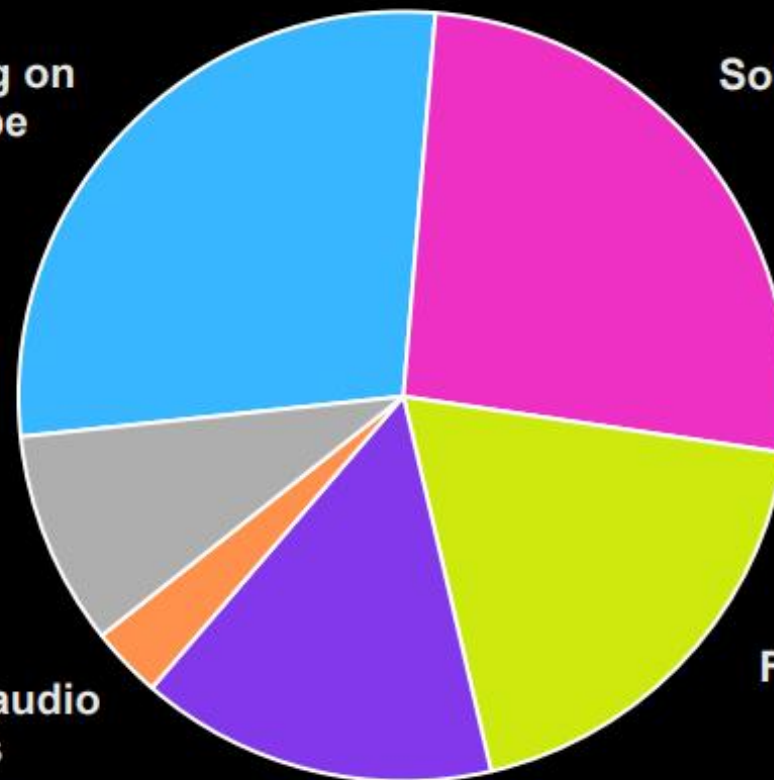
Social media posts
26%

Other
9%

Ads on other audio
programs
3%

Searching the internet
15%

Friends or family
19%



Source: Edison Research Gen Z Audio Study Q4 2024



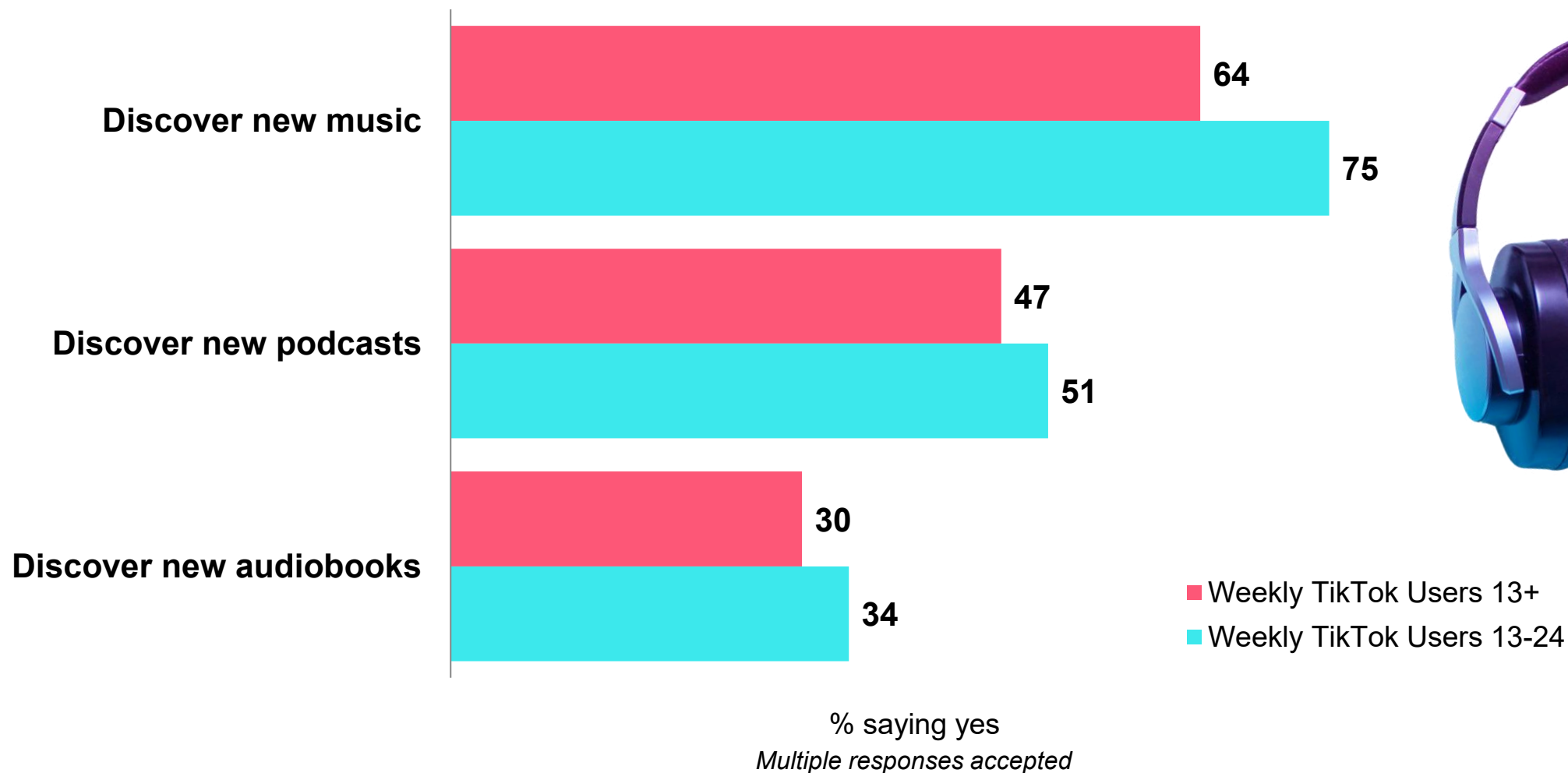
#8

**TikTok is a platform for
discovery for music,
podcasts, and audiobooks**

Source: The Infinite Scroll: A TikTok Report from Edison Research



Do you use TikTok with the intention to...?





#7

Podcast Fandom Goes Beyond Listening

Sources: The Fandom Phenomenon from Wondery and Dentsu





The Fandom Phenomenon

*Insights on the power of podcast fandom and its
impact on consumers, creators and advertisers*



Pods to Products and Experiences

We love Wow in the World. There are books, there's a podcast, there's a YouTube channel. And we've been able to take [our son] to see [the host] a few times. So, for us, there's a Wow in the World for every kind of free time we have.

Helen



43%

of podcast fans have engaged with podcasts through other forms of media such as TV, books, games, events, and more.

Community

Finding a sense of community is the primary driver for these fans. They are looking for like-minded people to engage with.

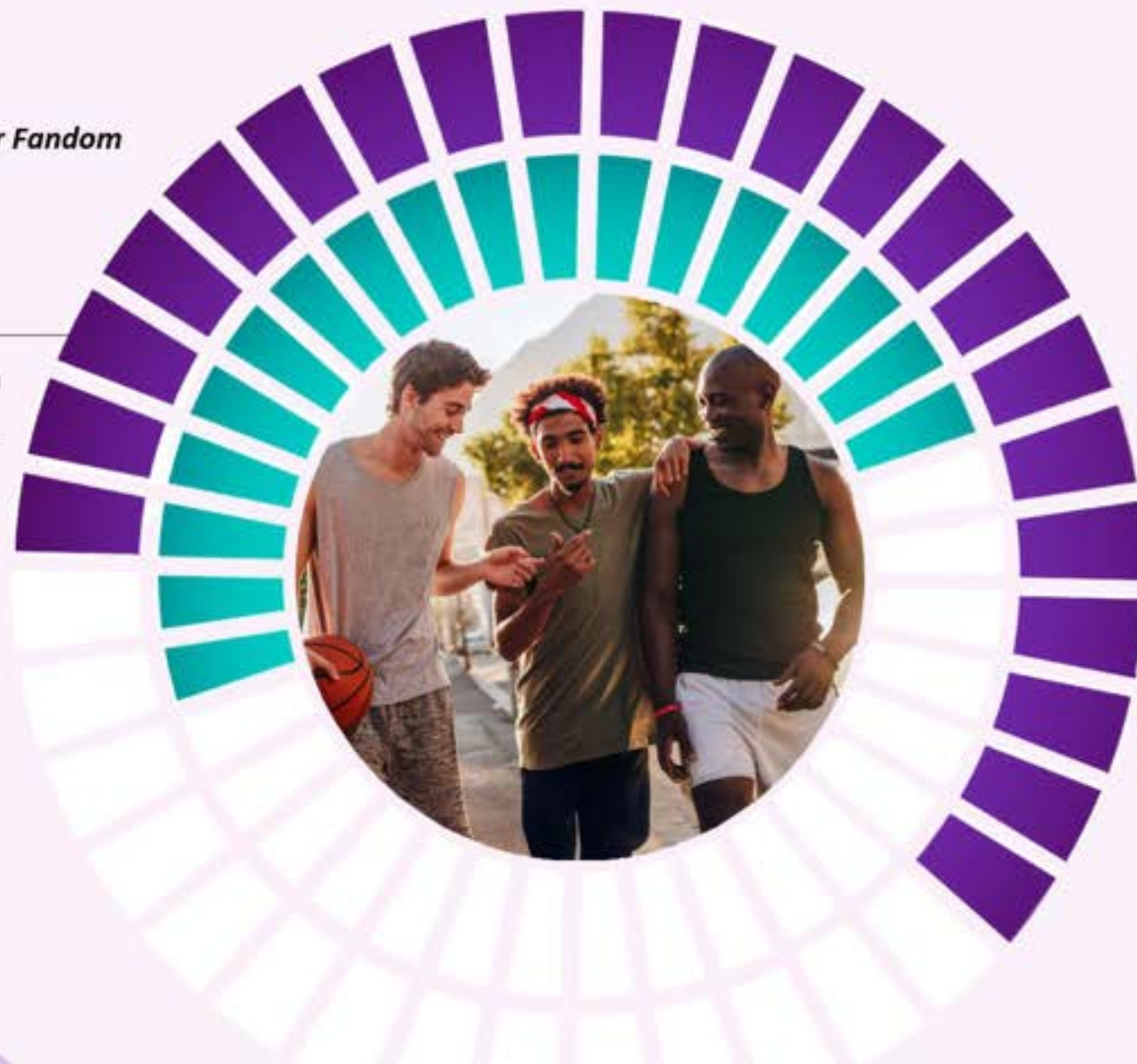
The Reason for Fandom

62%

are fans because podcasts help them feel like they're part of something bigger than themselves.

If you wanna do something, it's good to hang out with other people who do it. It's a lot easier to stay focused if you're around like-minded people.

David





#6

Women's Voices Matter in Podcasts and Music

Sources: Women's Audio Report; Edison Podcast Metrics



Top Podcast Shows for Reaching Women Listeners

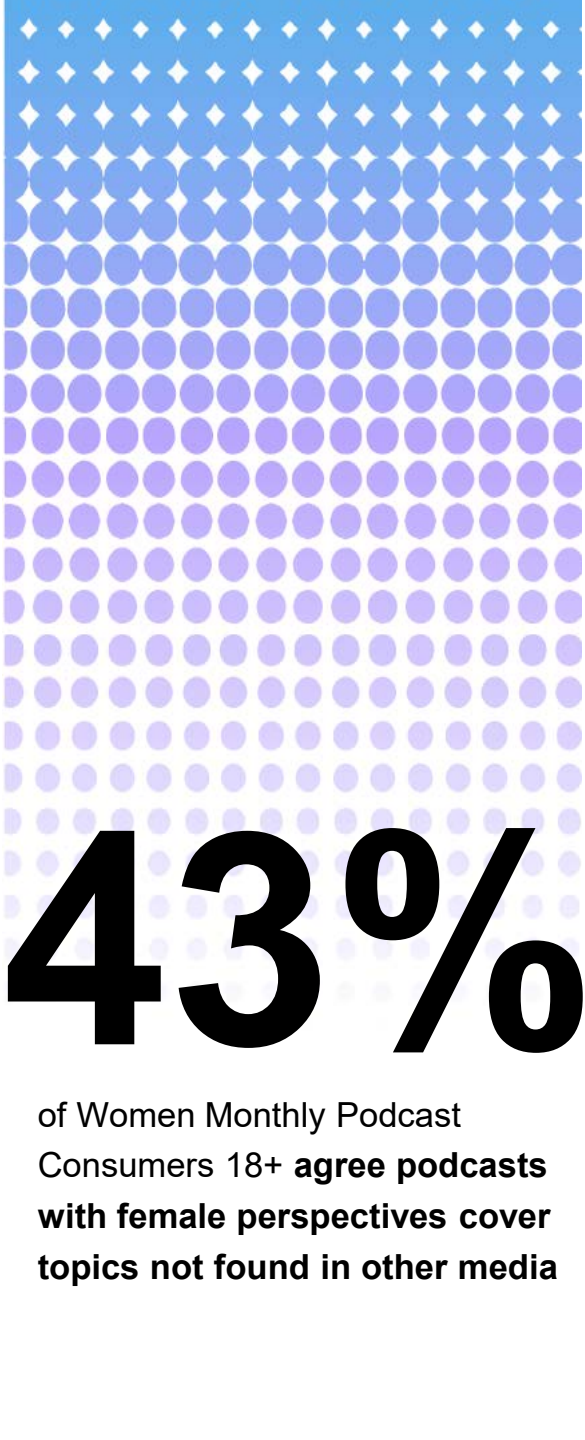
48%
of the top 25 shows among Women are **hosted or co-hosted by Women** (vs. 40% of top shows among A18+)

Source: Edison Podcast Metrics Q4 2024

Women Weekly Reach Rank Q4 2024

	Podcast	Producer
1	The Joe Rogan Experience	Joe Rogan
2	Crime Junkie	audiochuck
3	Call Her Daddy	Alex Cooper
4	Dateline NBC	NBC News
5	Morbid	Morbid Network Wondery
6	The Daily	The New York Times
7	MrBallen Podcast: Strange, Dark & Mysterious Stories	Ballen Studios
8	Rotten Mango	Stephanie Soo
9	The Tucker Carlson Show	Tucker Carlson Network
10	This Past Weekend w/ Theo Von	Theo Von
11	New Heights with Jason & Travis Kelce	Wondery
12	Cancelled with Tana Mongeau & Brooke Schofield	Cancelled & Audioboom Studios
13	Murder, Mystery & Makeup	Audioboom Studios
14	SmartLess	Jason Bateman, Sean Hayes, Will Arnett
15	Pod Save America	Crooked Media
16	Dumb Blonde	Dumb Blonde Productions
17	The Dan Bongino Show	Cumulus Podcast Network Dan Bongino
18	Stuff You Should Know	iHeartPodcasts
19	This American Life	This American Life
20	My Favorite Murder	Exactly Right Media
21	Dark History	Audioboom Studios
22	The Ben Shapiro Show	The Daily Wire
23	The Megyn Kelly Show	SiriusXM
24	Up First	NPR
25	The Ramsey Show	Ramsey Network

Denotes show with Female host/co-host



31%

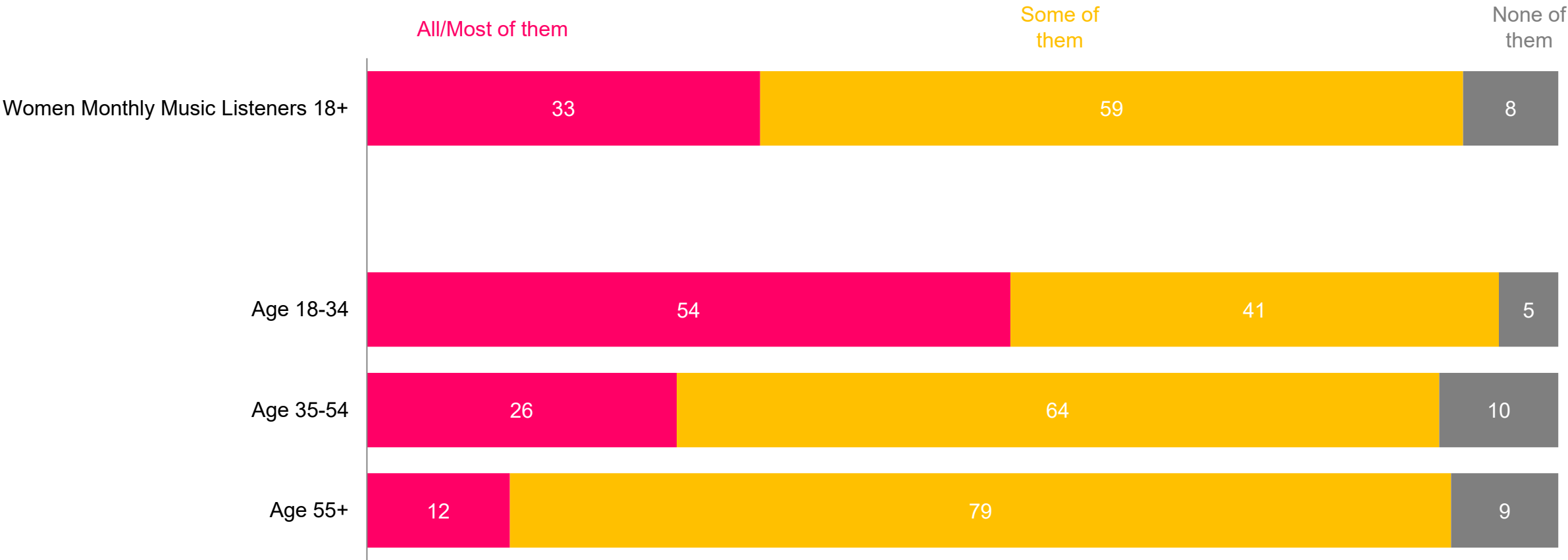
of Women Monthly Podcast
Consumers 18+ **seek out podcasts
hosted or produced by women**
specifically

43%

of Women Monthly Podcast
Consumers 18+ **agree podcasts
with female perspectives cover
topics not found in other media**

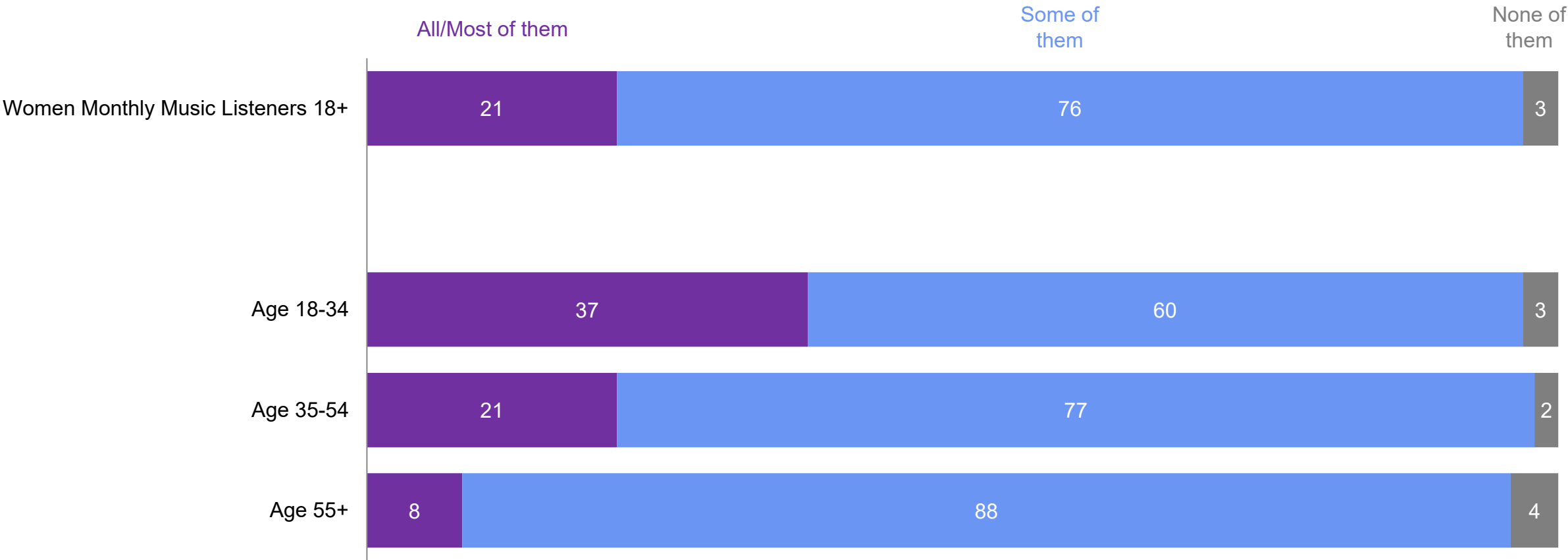
Of all the podcasts you regularly listen to, how many of them hosted or produced by women?

Base: Women Monthly Podcast Consumers 18+



Of all the musical artists you regularly listen to, how many of them are female?

Base: Women Monthly Music Listeners 18+





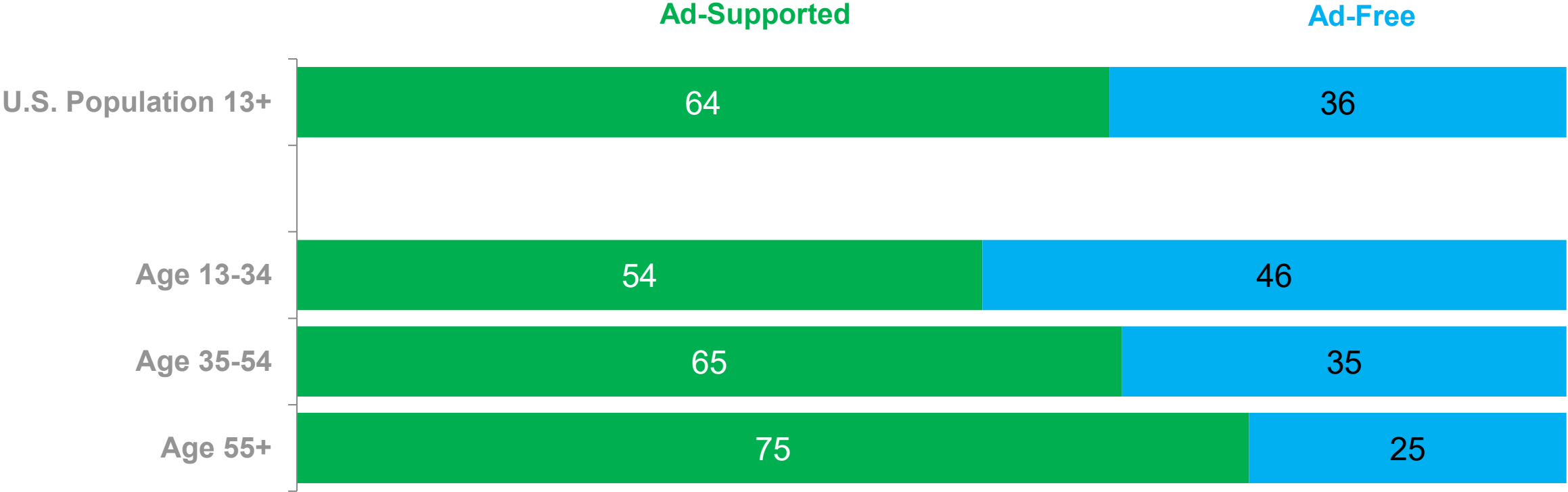
#5a

**Majority of All Daily
Listening Time is Spent
with Ad-supported Audio**

Sources: Share of Ear from Edison Research



Share of Time Spent Listening to Ad-Supported or Ad-Free Audio Sources



How to read: Among the U.S. Population age 13+, 64% of the daily time spent listening to audio is with ad-supported sources

Ad-supported sources include AM/FM radio and radio streams, music on YouTube with ads, SiriusXM talk channels, free versions of streaming audio sources, and podcasts





#5b

Time Spent with **Streaming Music** Shifts from Free to Paid

Sources: Share of Ear from Edison Research

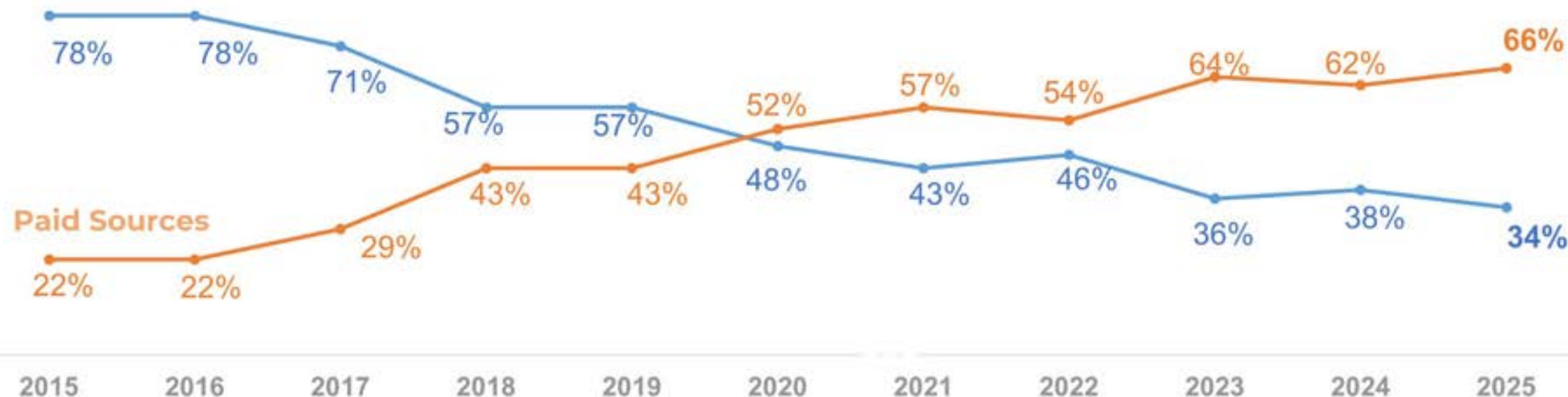


Listening Time Shifts from Free to Paid Streaming Music Platforms

Share of Daily Time Spent with Streaming Music

U.S. Population 13+

Free Sources



Does not include listening to AM/FM radio music stations online

Source: Edison Research Share of Ear® 2014 - Q3 2025

Edison Research is a part of SSRS



#4

In-Car Audio Shifts to Digital

Sources: The Infinite Dial

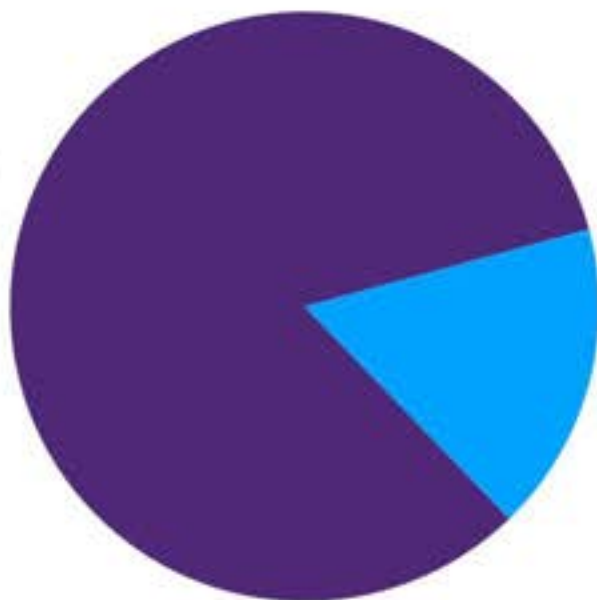


Digital Revolution in The Car



If they have it, they use it

Have Apple
CarPlay/Android
Auto and use it
83%



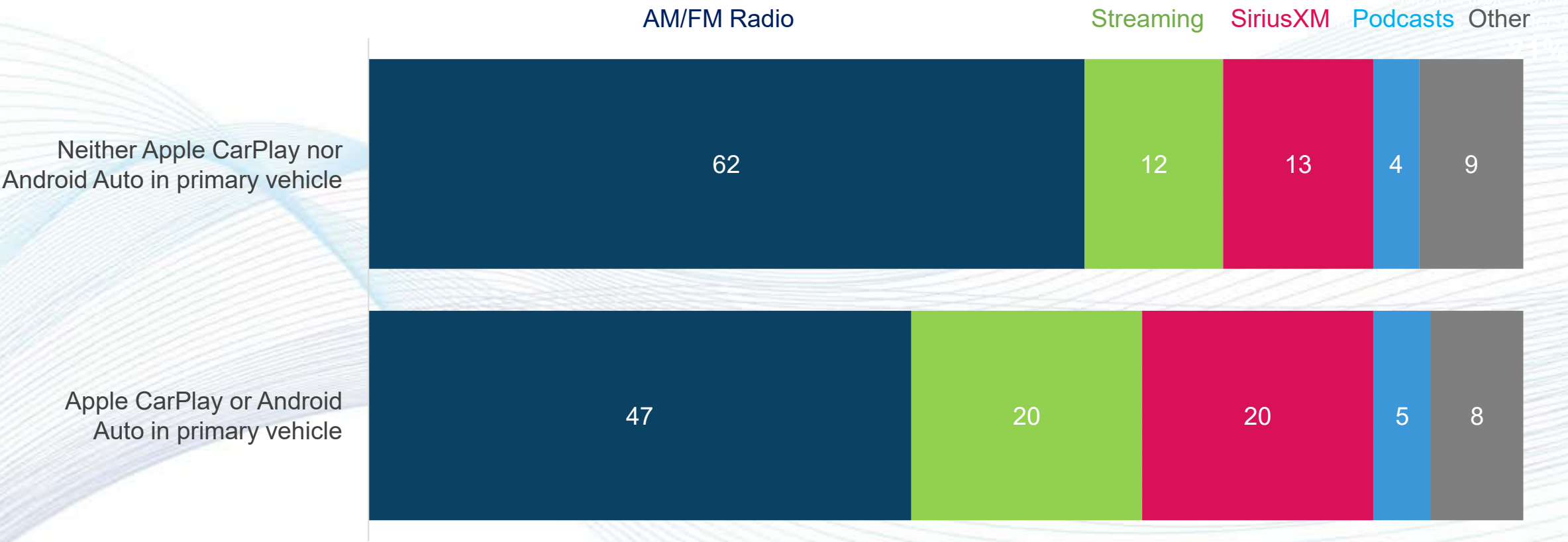
Have Apple
CarPlay/Android
Auto; do not use it
17%

BASE: U.S. 18+ WHO HAS DRIVEN/RIDDEN IN CAR IN LAST MONTH; 88%



Share of In-Car Time Spent Listening to Audio Platforms

U.S. Population 13+



How to read: Among the U.S. Population age 13+ with Apple CarPlay or Android Auto in their primary vehicle, 47% of the daily time spent listening to audio in-car is spent with AM/FM Radio



Primary vehicle refers to car or truck ridden in or driven in most often
Source: Share of Ear Q2 2024-Q2 2025



#3

Shifting Ad Budget to Podcasts Can Increase Reach

Sources: Nielsen Podcast Fusion powered by Edison Research



Shifting Money to Podcasts Increases Reach for No Additional Budget

1 Month Campaign | \$5,000,000 Budget:

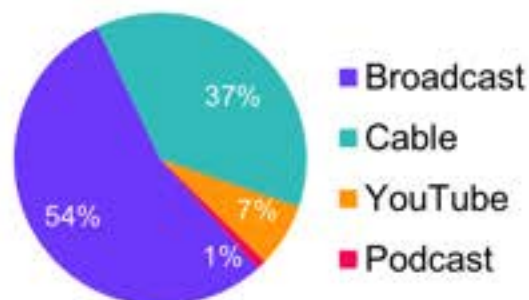
Reach Among Adults 18-44,
with **1%** Podcast Spend:

60%

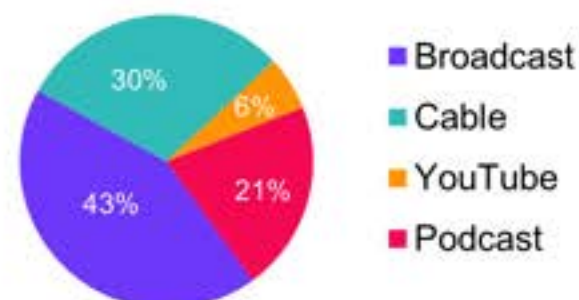
Reach Among Adults 18-44, with,
with **21%** Podcast Spend:

76%
(+27% Lift)

\$5M Media Plan with **1%** Podcast Spend:



\$5M Media Plan with **21%** Podcast Spend:



Source: Nielsen Media Impact with Podcast Fusion powered by Edison Podcast Metrics; Adults 18-44

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#2



Smart Speaker Adoption Varies by Country

Sources: The Infinite Dial: Australia, New Zealand, UK, U.S.



THE INFINITE DIAL® 2025



THE INFINITE DIAL® NZ 2025

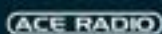


mediaworks.

NZME.

RBA.

THE INFINITE DIAL® 2025



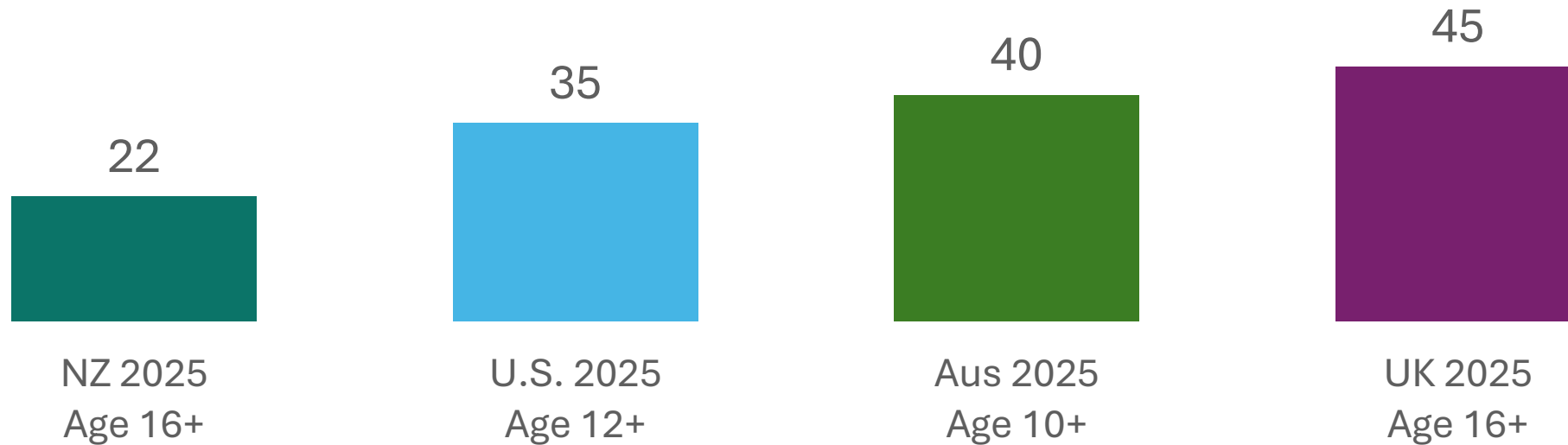
THE INFINITE DIAL® UK 2025



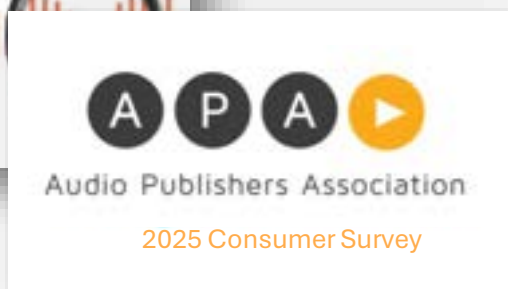
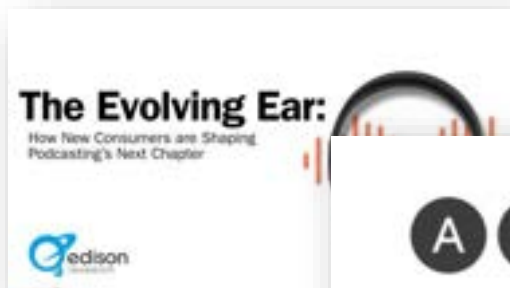
Smart Speaker Ownership

TOTAL POPULATIONS

% OWNING A SMART SPEAKER



#1



Consumption of AI-narrated audio is increasing

Sources: The Evolving Ear from Edison Research; The Audio Publishers Association 2025 Consumer Survey



% willing to try AI-Narrated Audiobooks

U.S. audiobook listeners | Age 18+ | June 2025



Have you ever listened to a podcast that was narrated by an artificially generated (AI) voice?

U.S. Weekly Consumers of audio-only and video podcasts | Age 13+ | Q2 2025

22%

answered “yes”

BONUS FINDING

More than 30% of Americans are awake by 6:00am

Source: Edison Research National Survey published in Edison's Weekly Insights



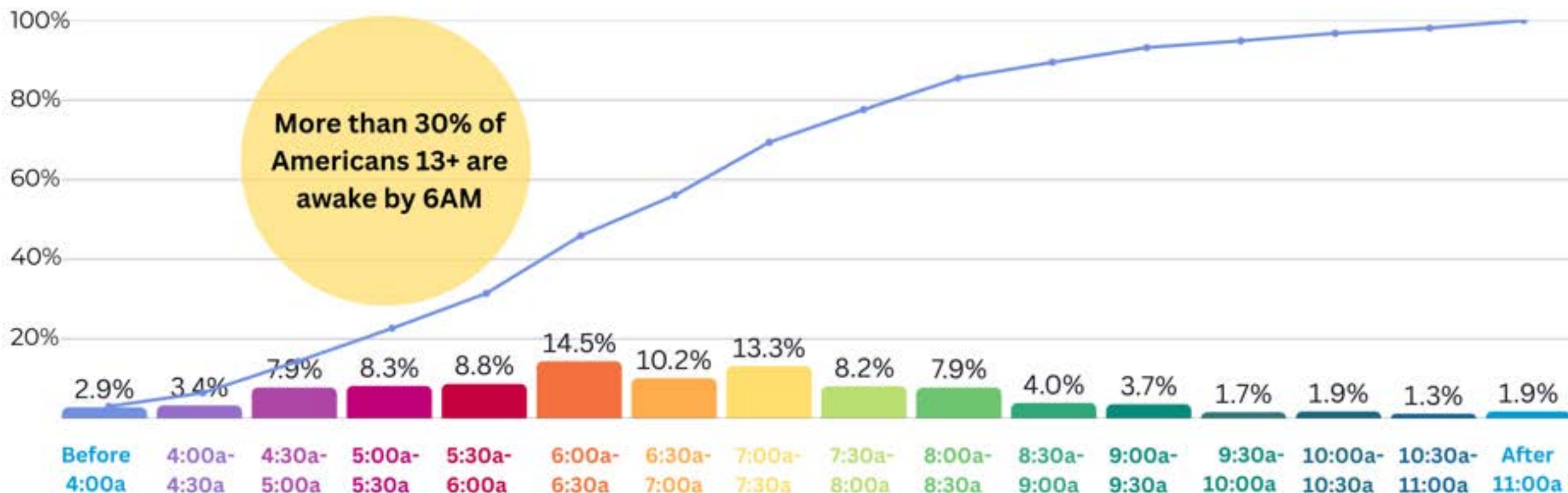
What Time Do Americans Wake Up on Weekdays?

U.S. Population Age 13+



% waking up in each half hour

% awake by this time (cumulative)



How to read: 31% of Americans 13+ are awake by 6am on weekdays; 14.5% of Americans wake up between 6am and 6:30am on weekdays

Source: Edison Research National Survey, N=1823, Conducted Q1 2025

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2025

Top **Ten Findings**

Edison Research is part of SSRS