

Consumer Attitudes on Podcast Advertising

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Edison Research



How you know.SM



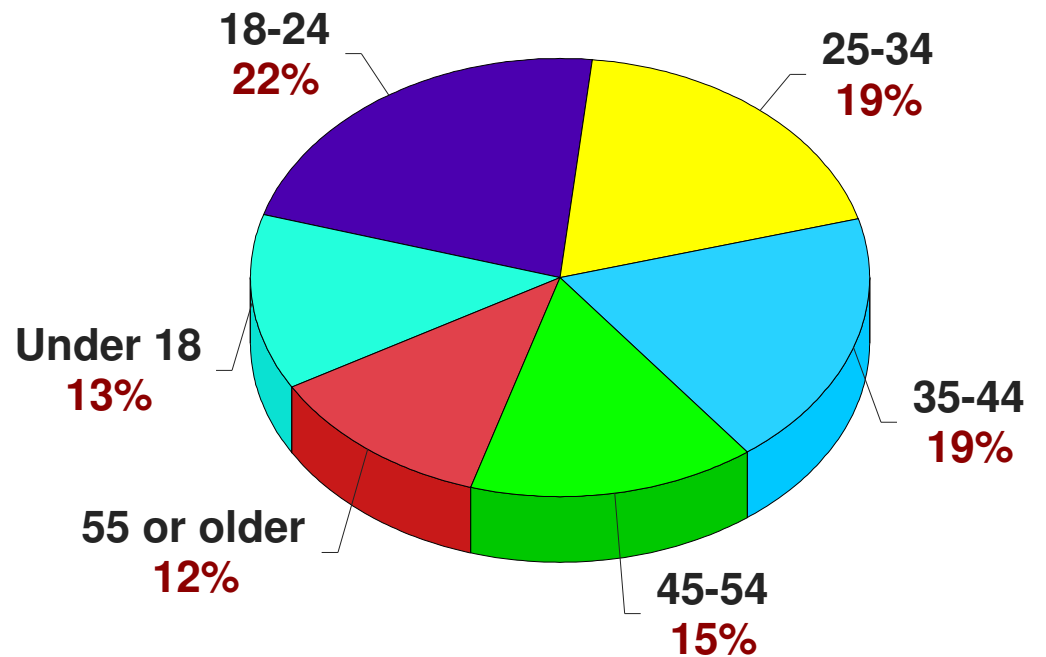
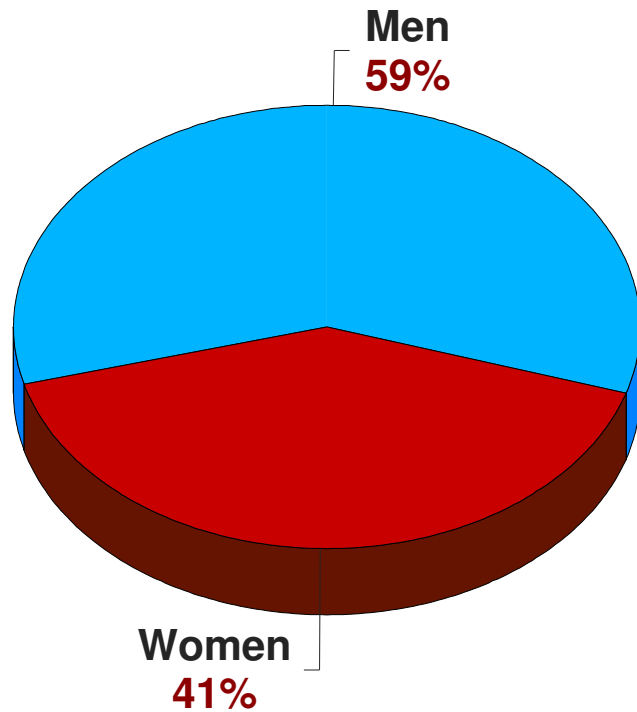


How The Survey Was Conducted:

- 4787 total interviews nationwide
- Participants were recruited from on-air promotions in podcasts by leading podcast aggregators including: NPR, RawVoice, Revision3 and Wizzard
- Interviews conducted 10/20 - 11/16, 2009
- Data is weighted by age and sex according to national data from the 2009 Edison/Arbitron Internet & Multimedia Survey

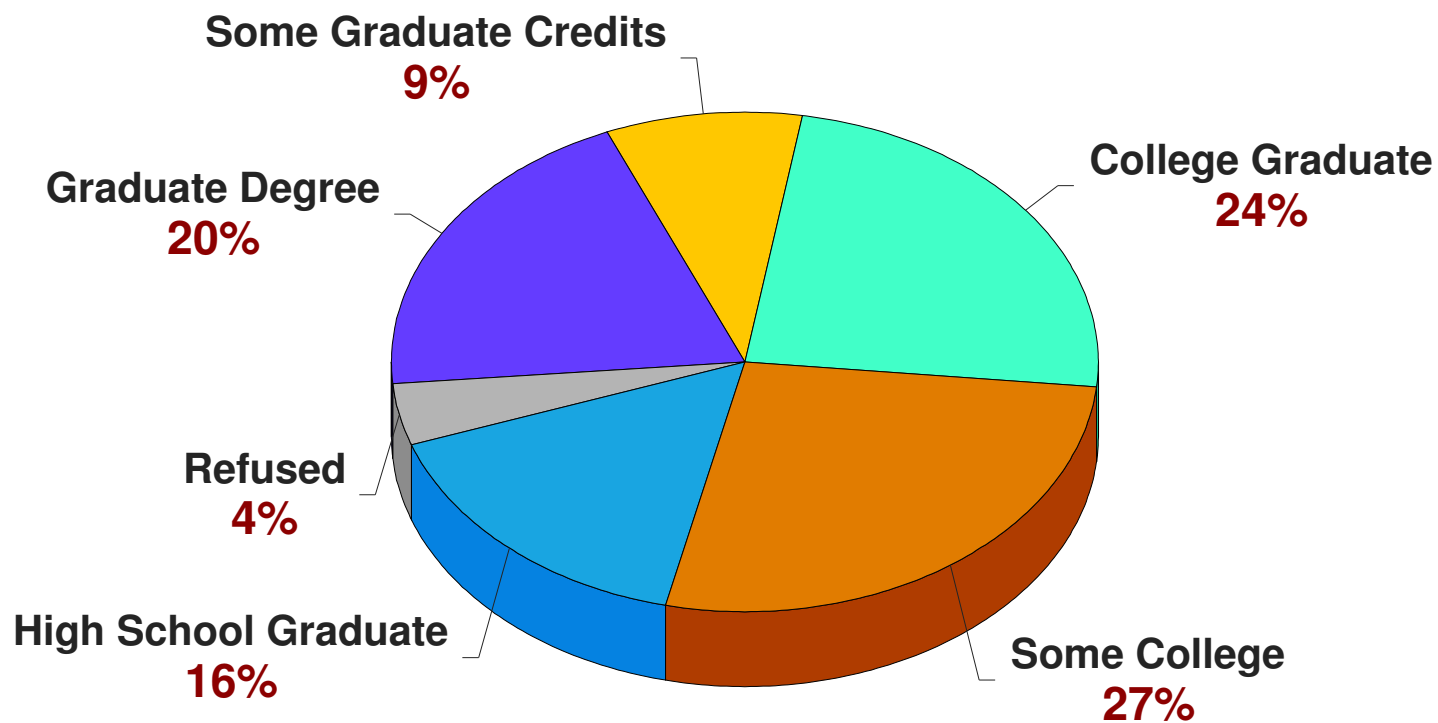


Who Was Interviewed: (Age)

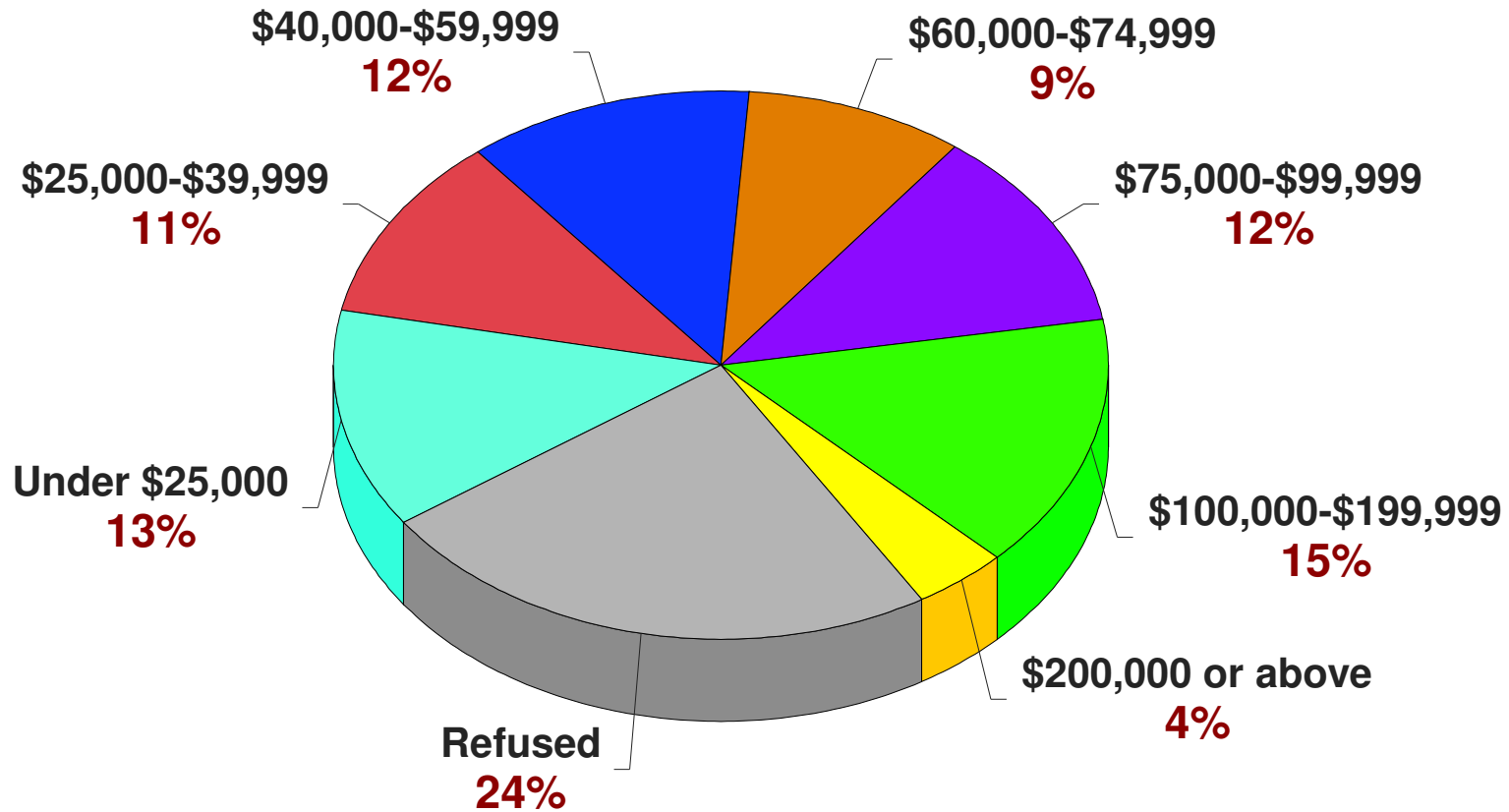




Who Was Interviewed: (Education)



Who Was Interviewed: (2009 HH Income)



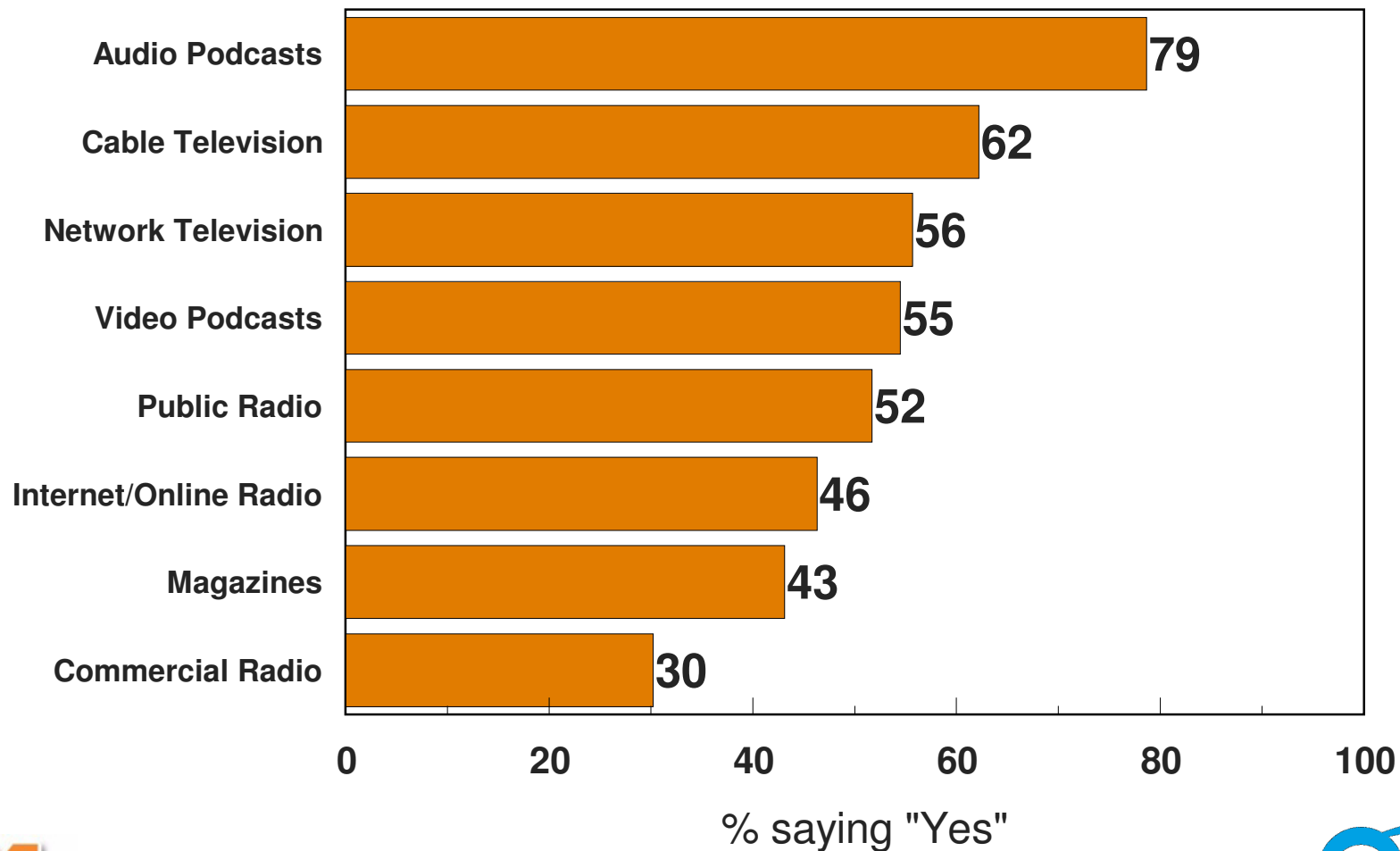


Section One:

Media Consumption & Device Ownership

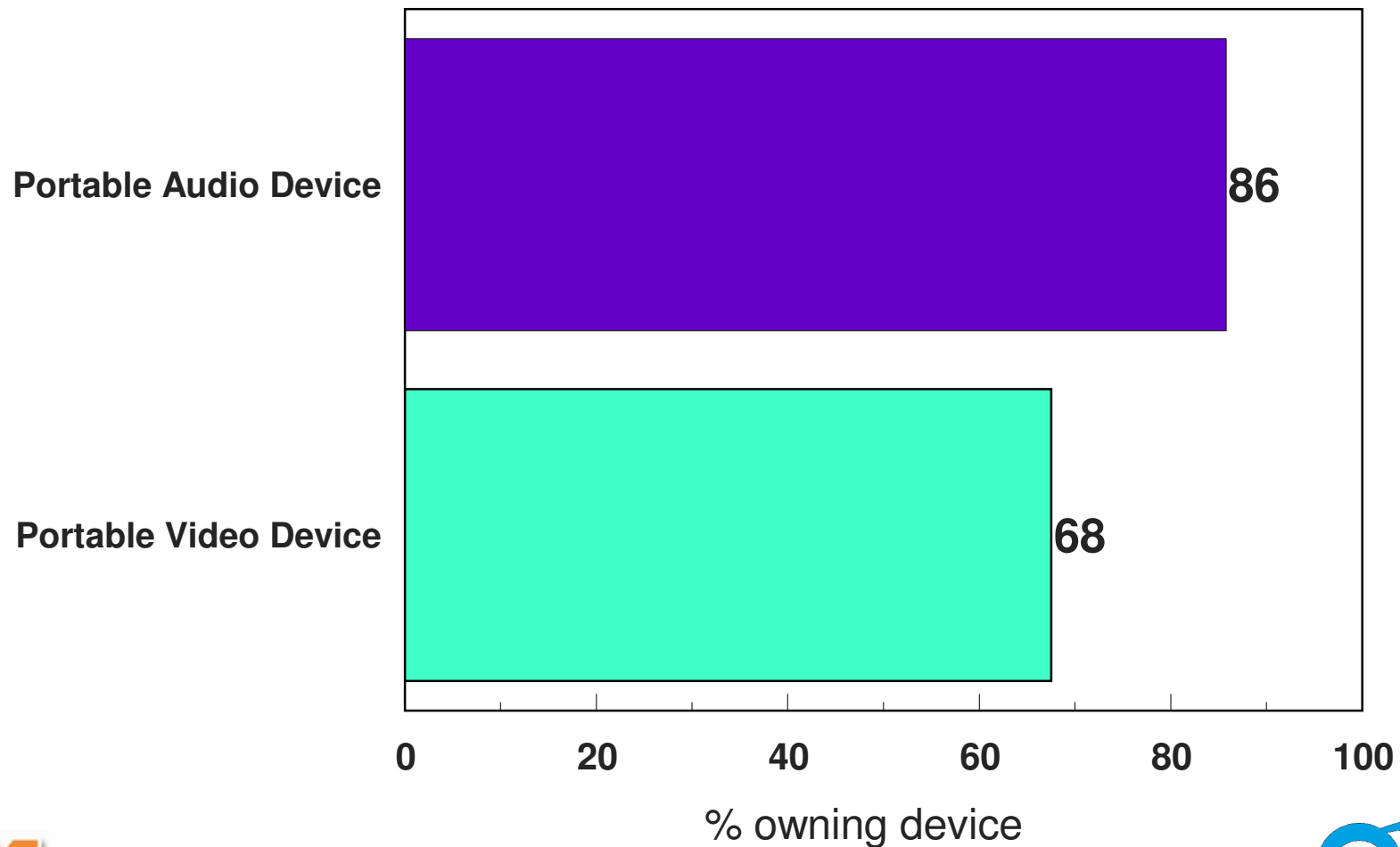
Nearly four-in-five regularly listen to audio podcasts each week

"Do you regularly watch or listen to (medium) each week?"





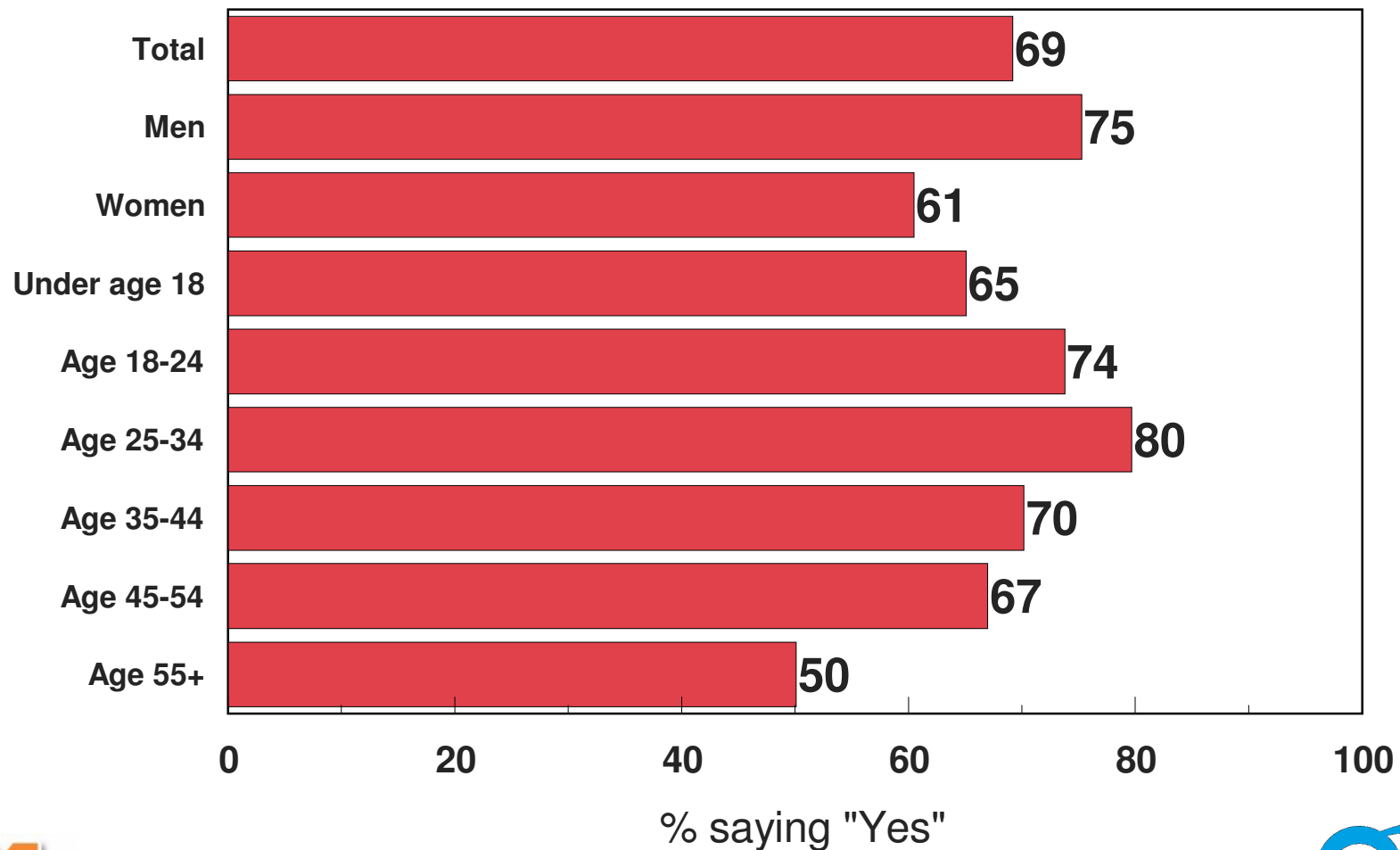
Portable Device Ownership





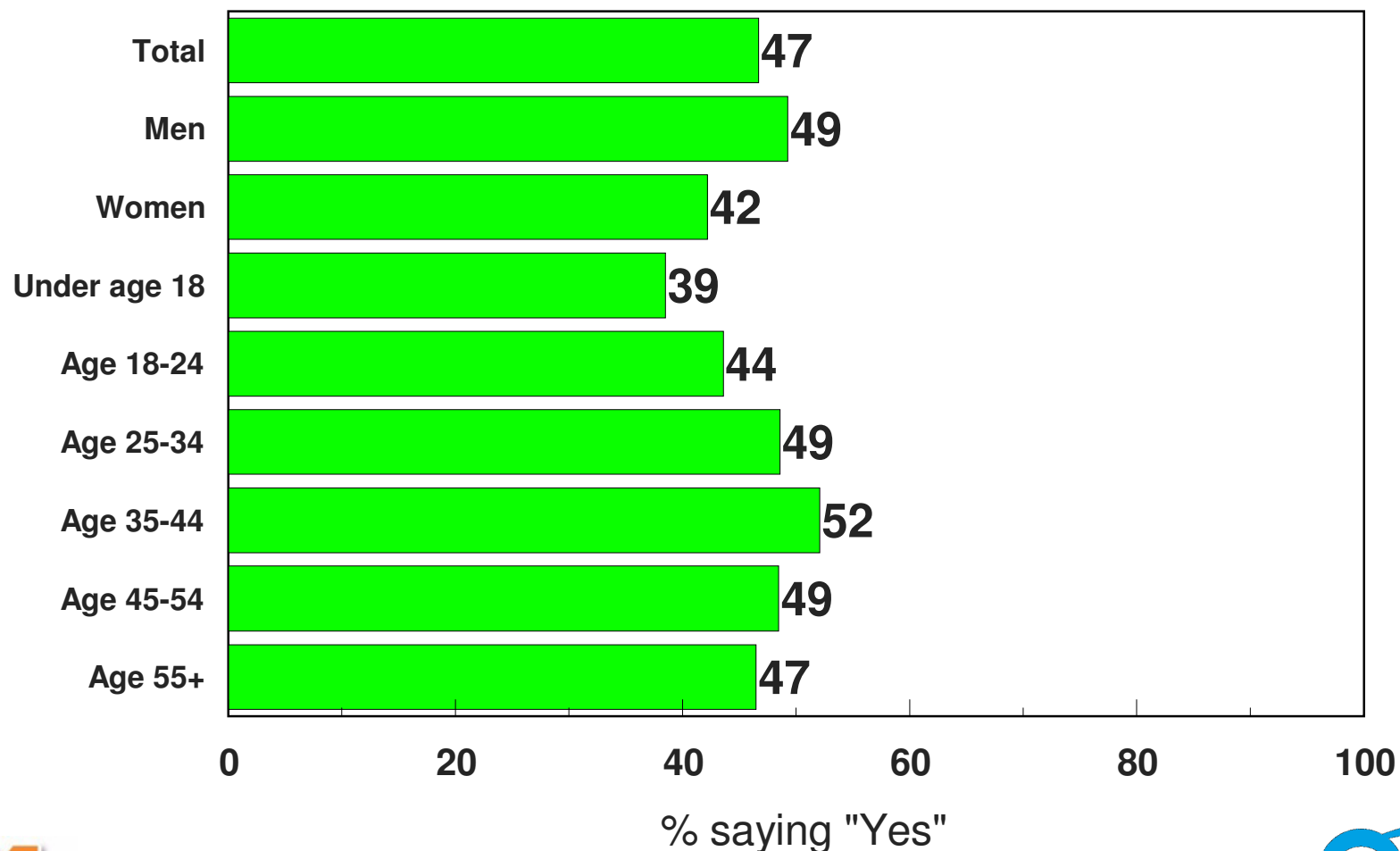
MP3-Capable Mobile Phone Ownership

"Do you own a mobile phone that is capable of playing digital audio or MP3 files?"



Nearly half of those who own an MP3-capable mobile phone regularly listen to digital audio on the phone

"Do you regularly listen to digital audio or MP3 files on your mobile phone?"

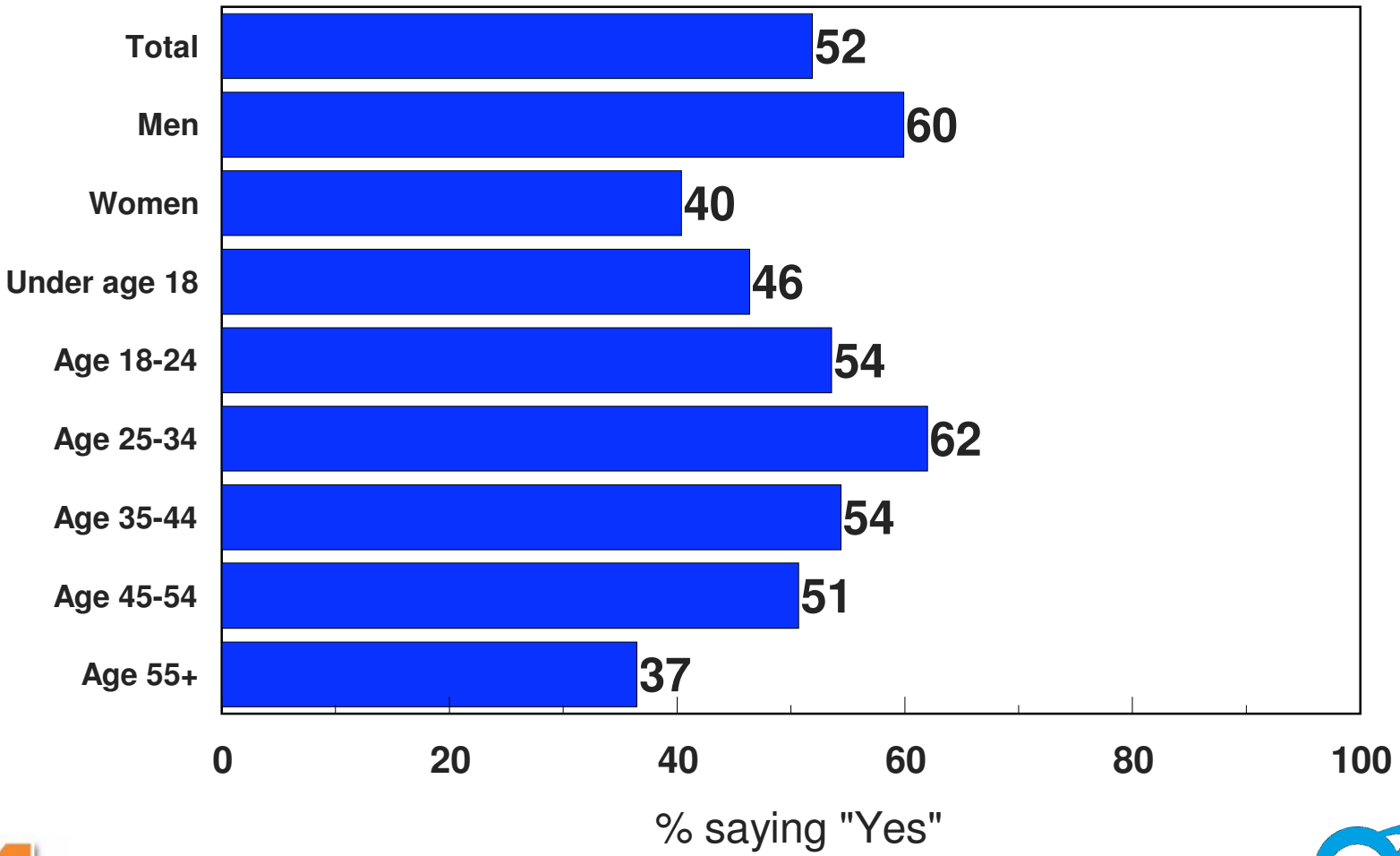


Base: Own an MP3-capable mobile phone



Video-Capable Mobile Phone Ownership

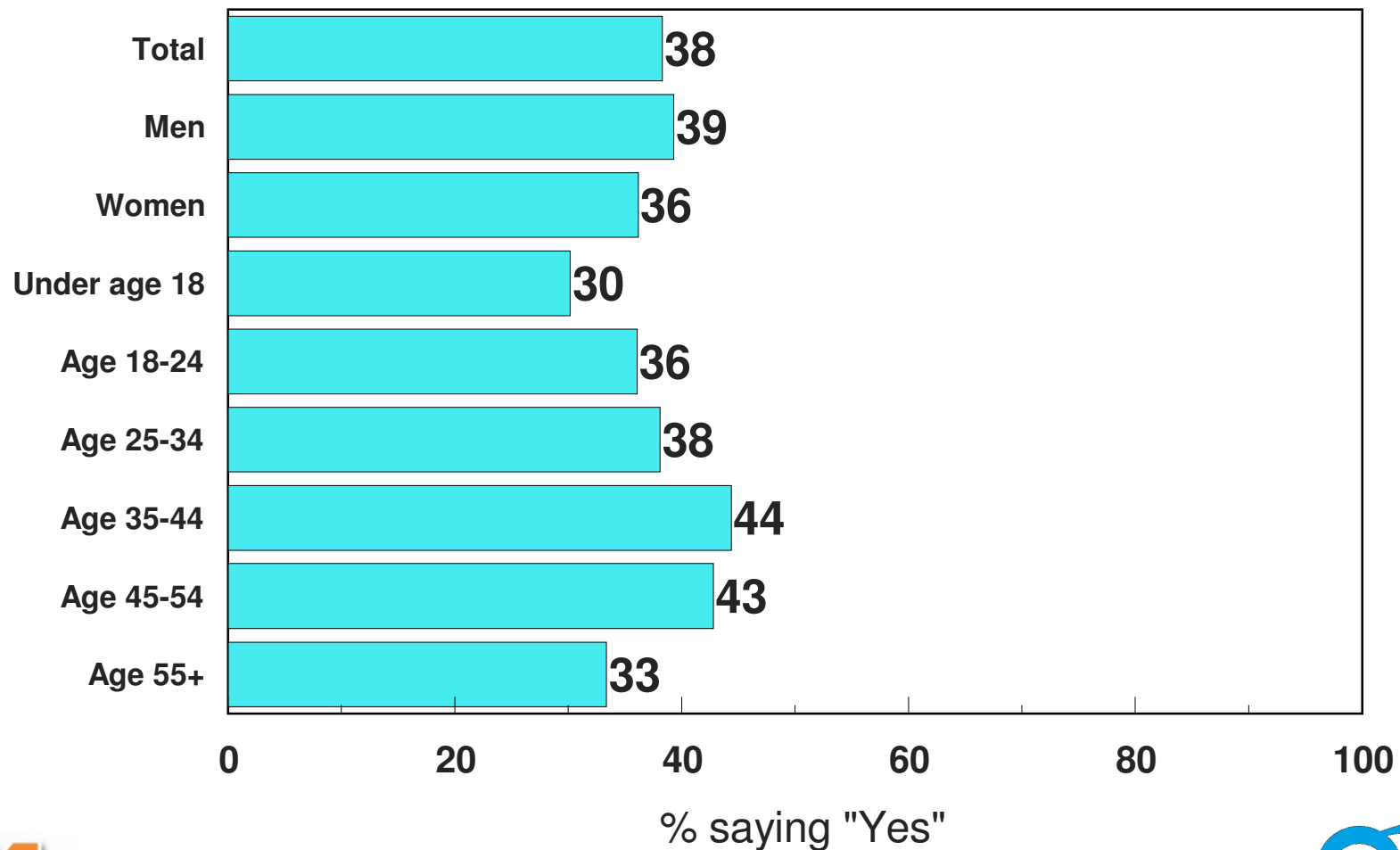
"Do you own a mobile phone that is capable of playing digital video files?"





Nearly two-in-five of those who own a video-capable mobile phone regularly watch video files on the phone

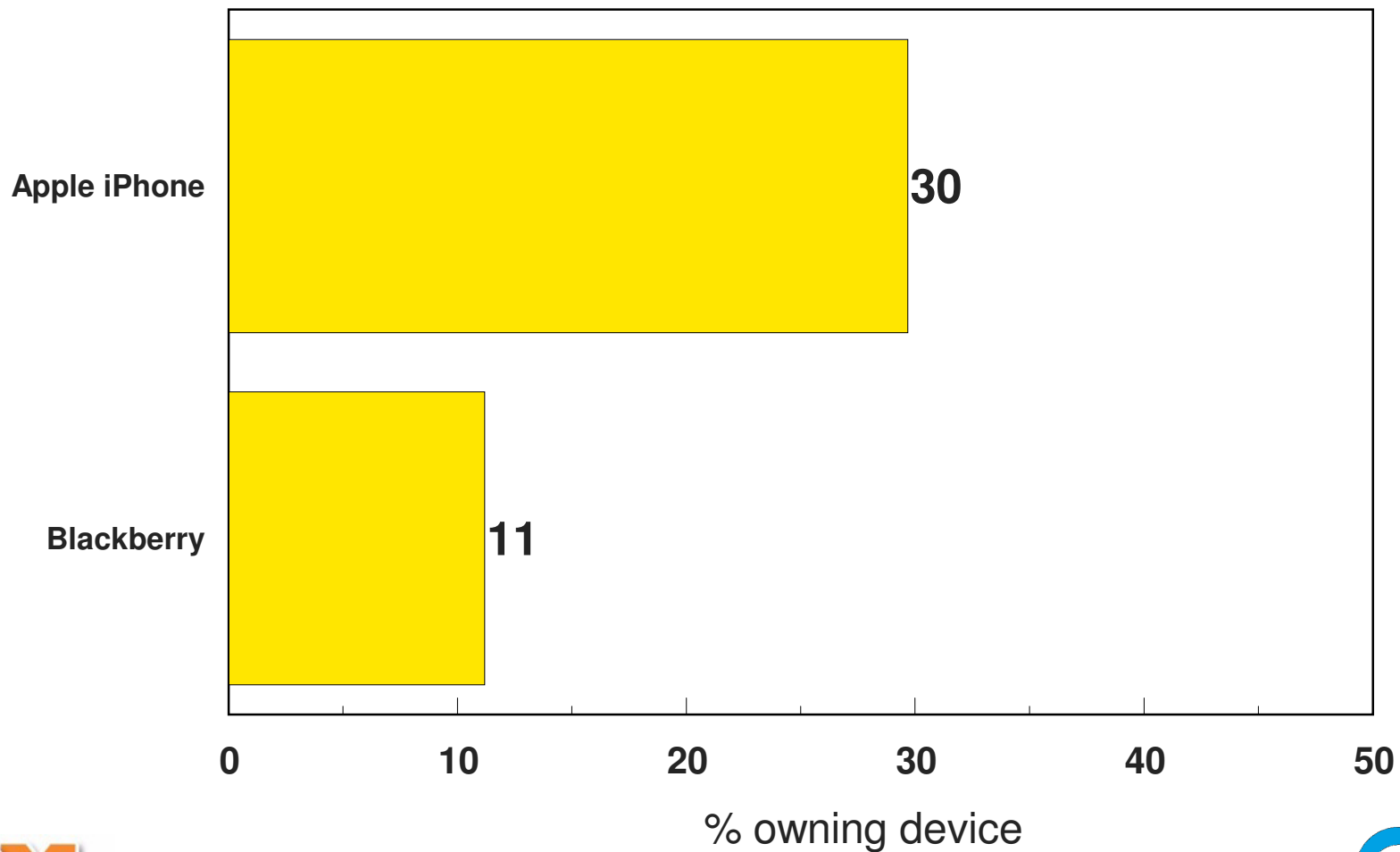
"Do you regularly watch digital video files on your mobile phone?"



Base: Own a video-capable mobile phone



Mobile Phone Ownership





Section Two:

Podcast Consumption



Time-shifted watching/listening is the most important podcast feature

"Think specifically about the audio and/or video podcasts you regularly enjoy. How important is each of the following to you?"

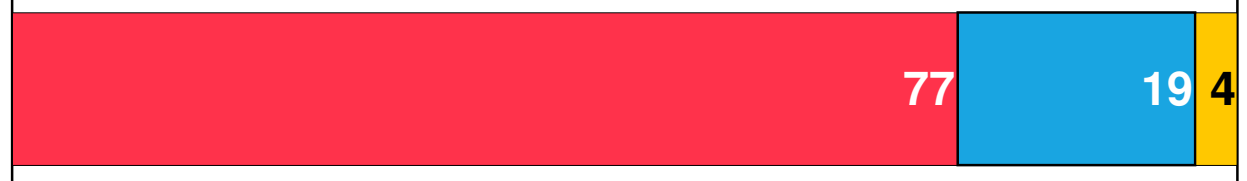
**Important
(8-10)**

**Neutral (4-7)
Not Important (1-3)
Mean**

The ability to watch/listen to programs whenever you want



The ability to watch/listen to programs wherever you want



The ability to watch/listen to unique content that you cannot get elsewhere



The ability to watch/listen to programs on demand, the instant you click them

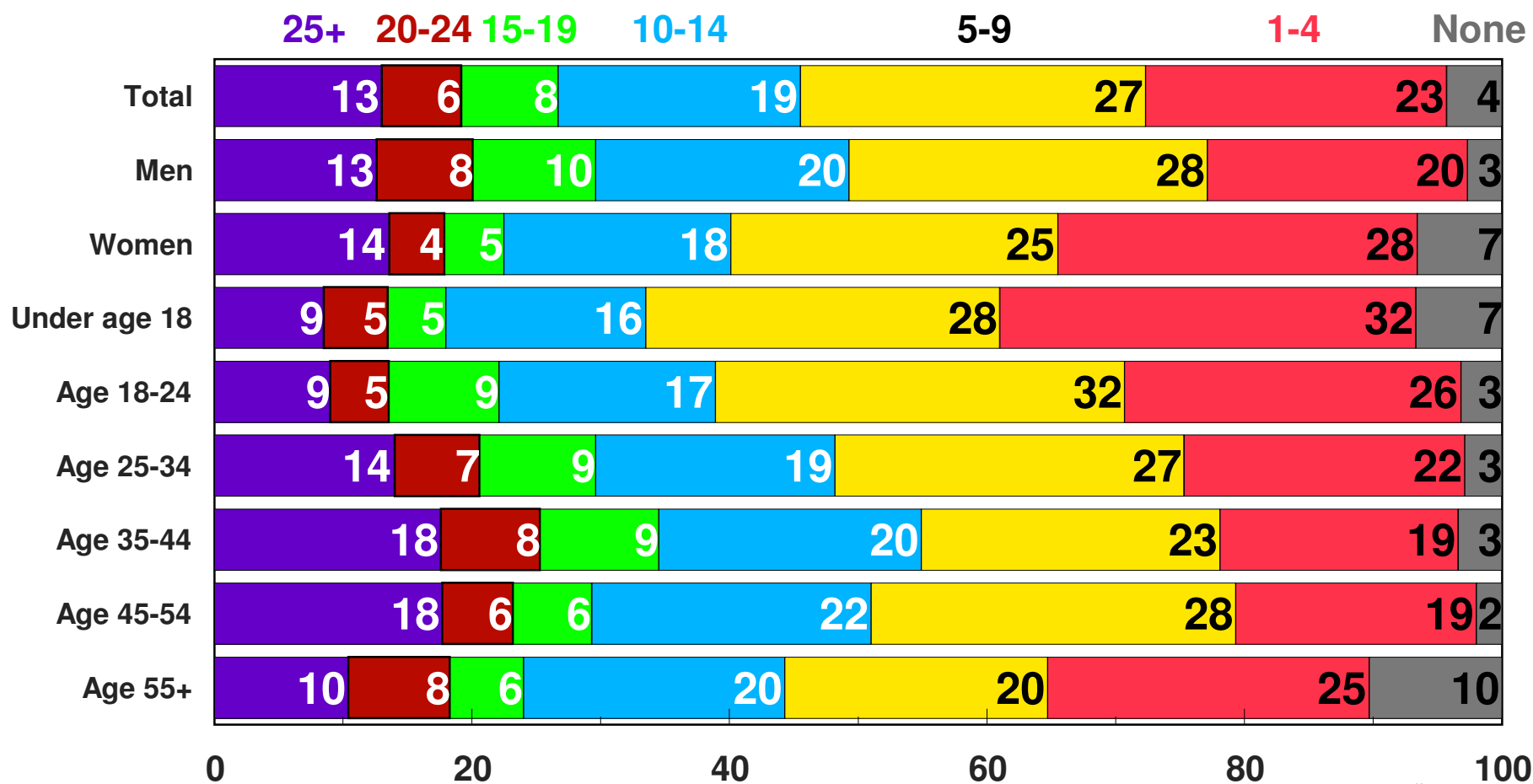


0 20 40 60 80 100



Podcast Subscriptions

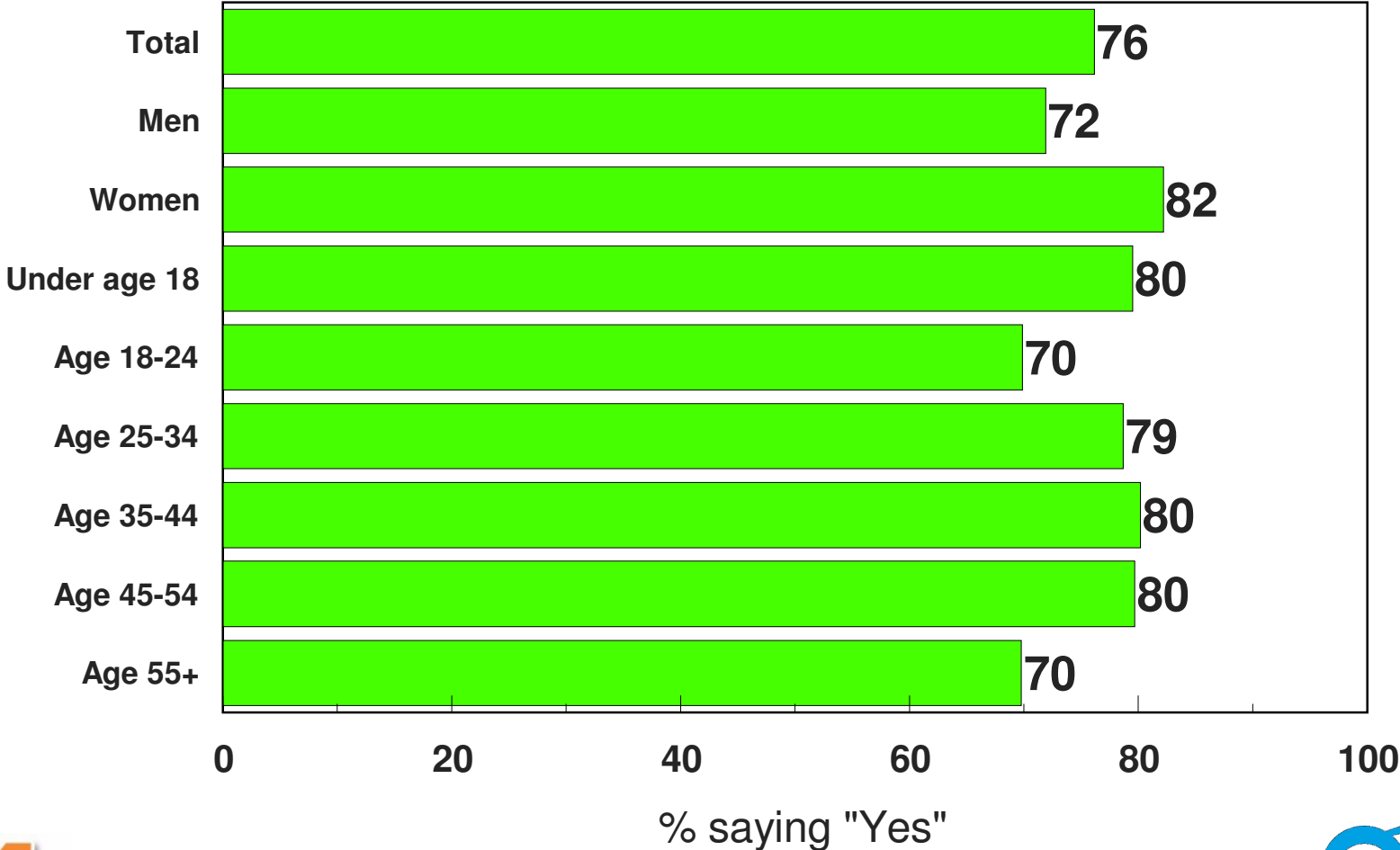
"Approximately how many different podcasts/downloadable media shows do you subscribe to?"





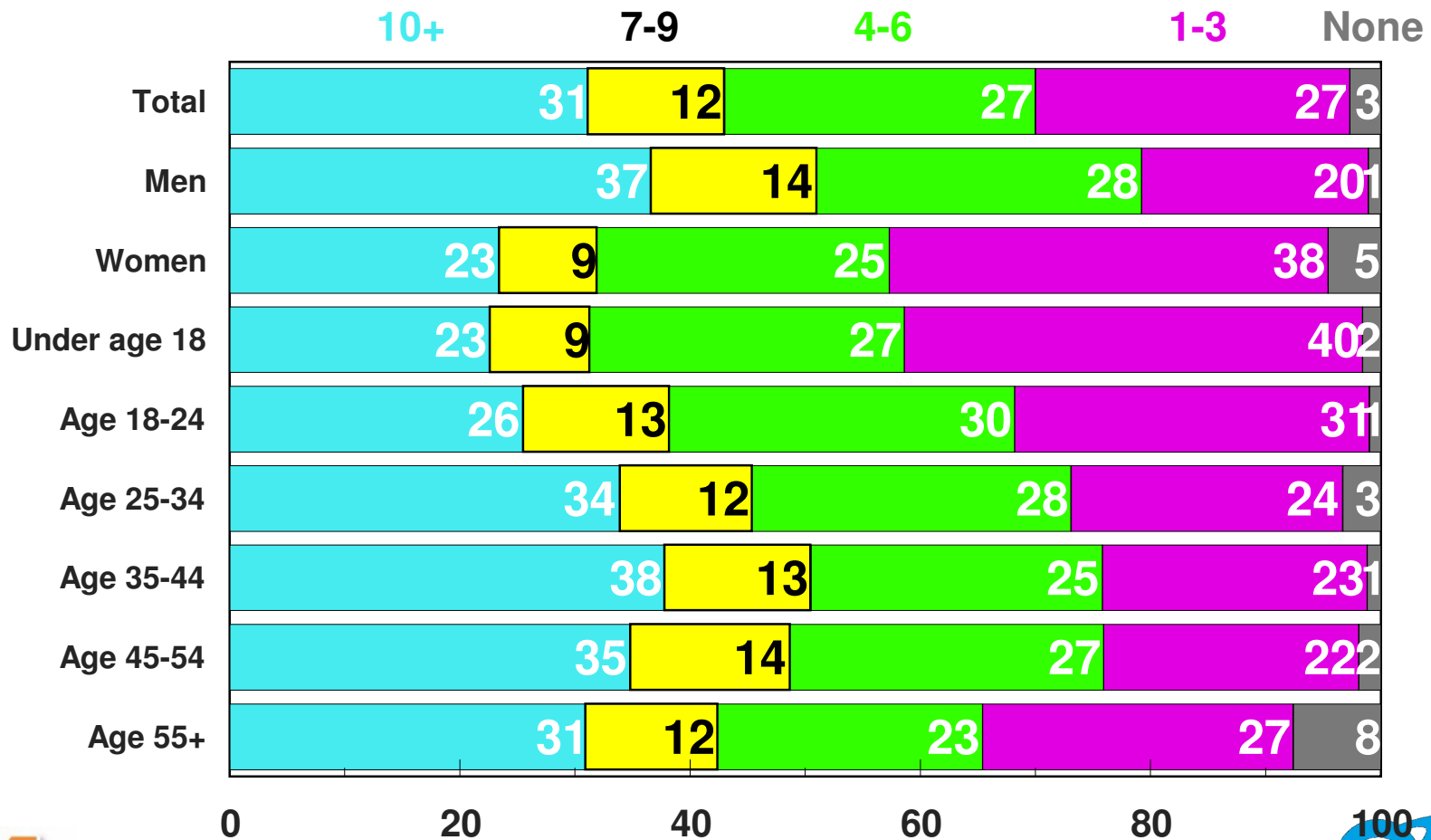
Usage of iTunes for Podcasts

"Do you ever use Apple iTunes to find and subscribe to audio or video podcasts?"



More than one-third listen to ten or more different podcast shows per week

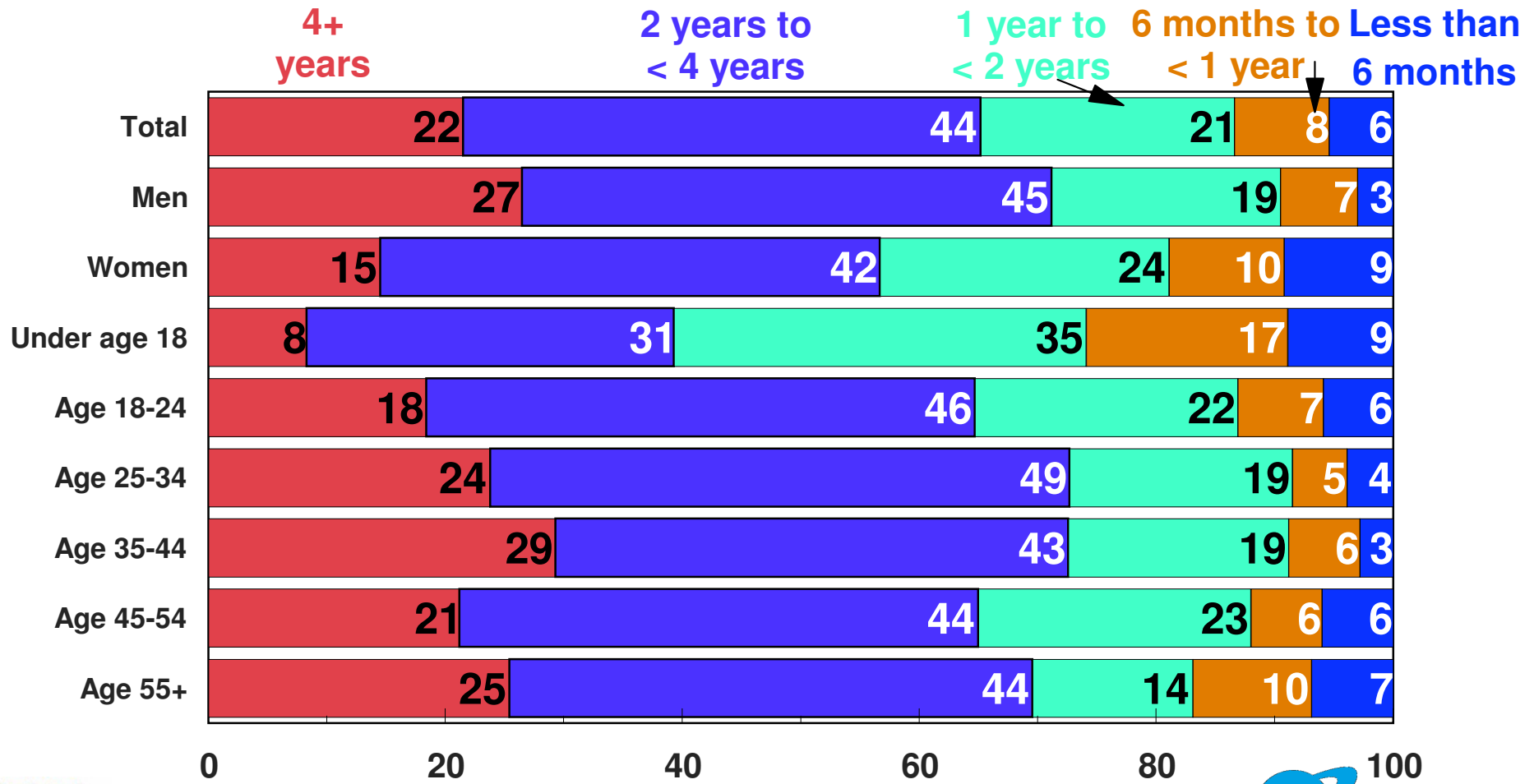
"Approximately how many different podcast shows -- as opposed to episodes of the same show -- do you regularly watch or listen to each week?"





More than six-in-ten have been consuming podcasts for two years or more

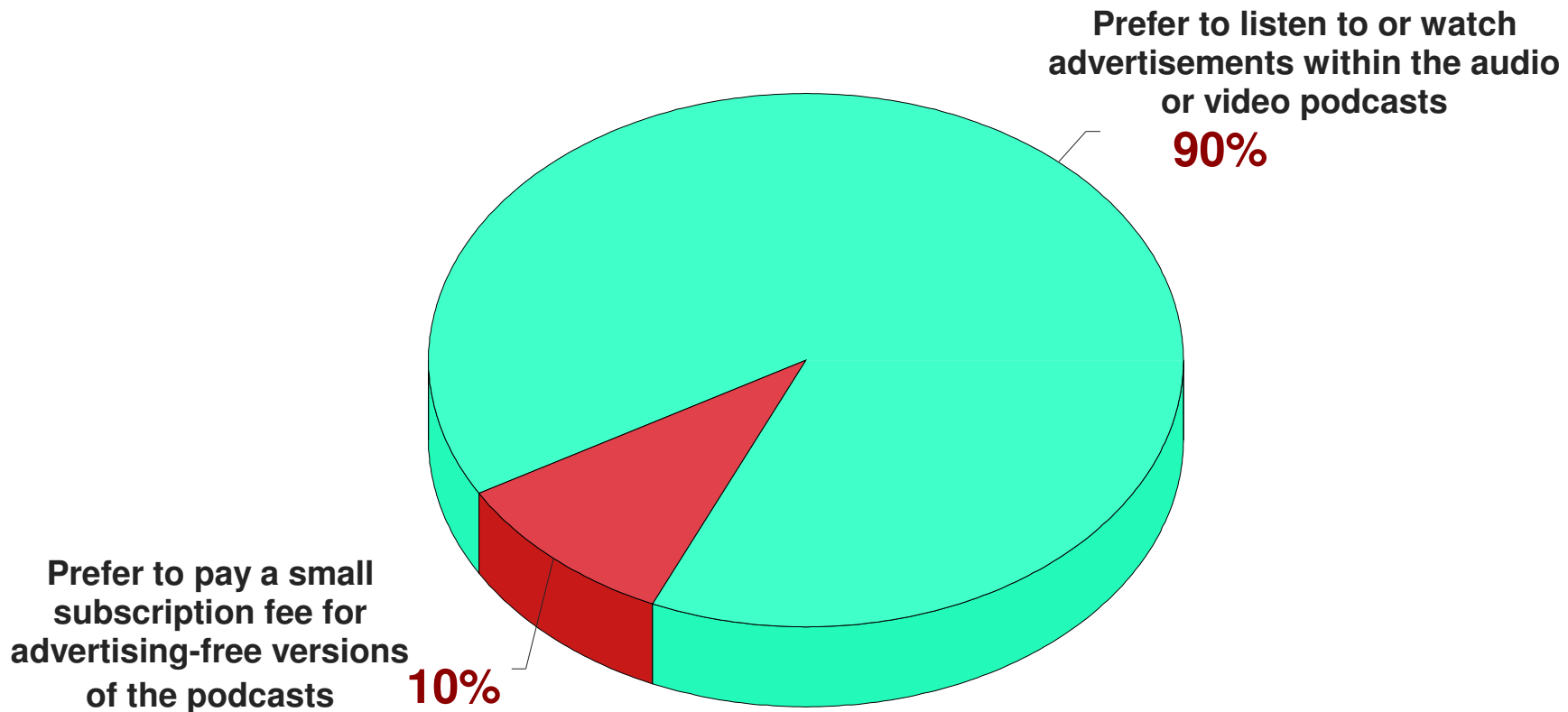
"Approximately how long have you been listening to or watching audio or video podcasts?"





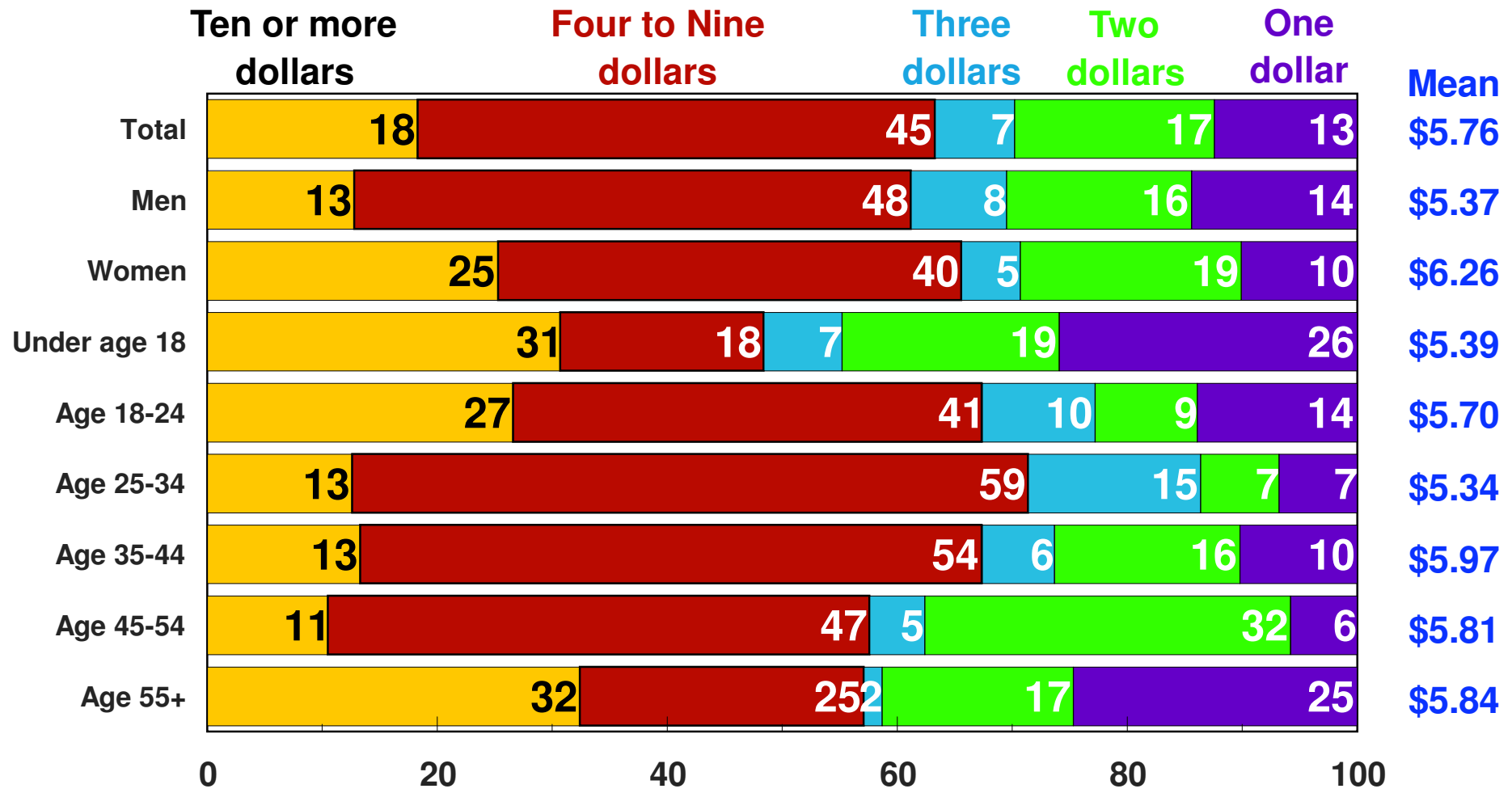
Majority prefer advertisements over subscription fee

"Think about the podcasts you watch or listen to regularly. What would be your preferred means to compensate those involved?"





How much per month would you be willing to pay for a program that you regularly enjoy?



Base: Would prefer to pay a small subscription fee



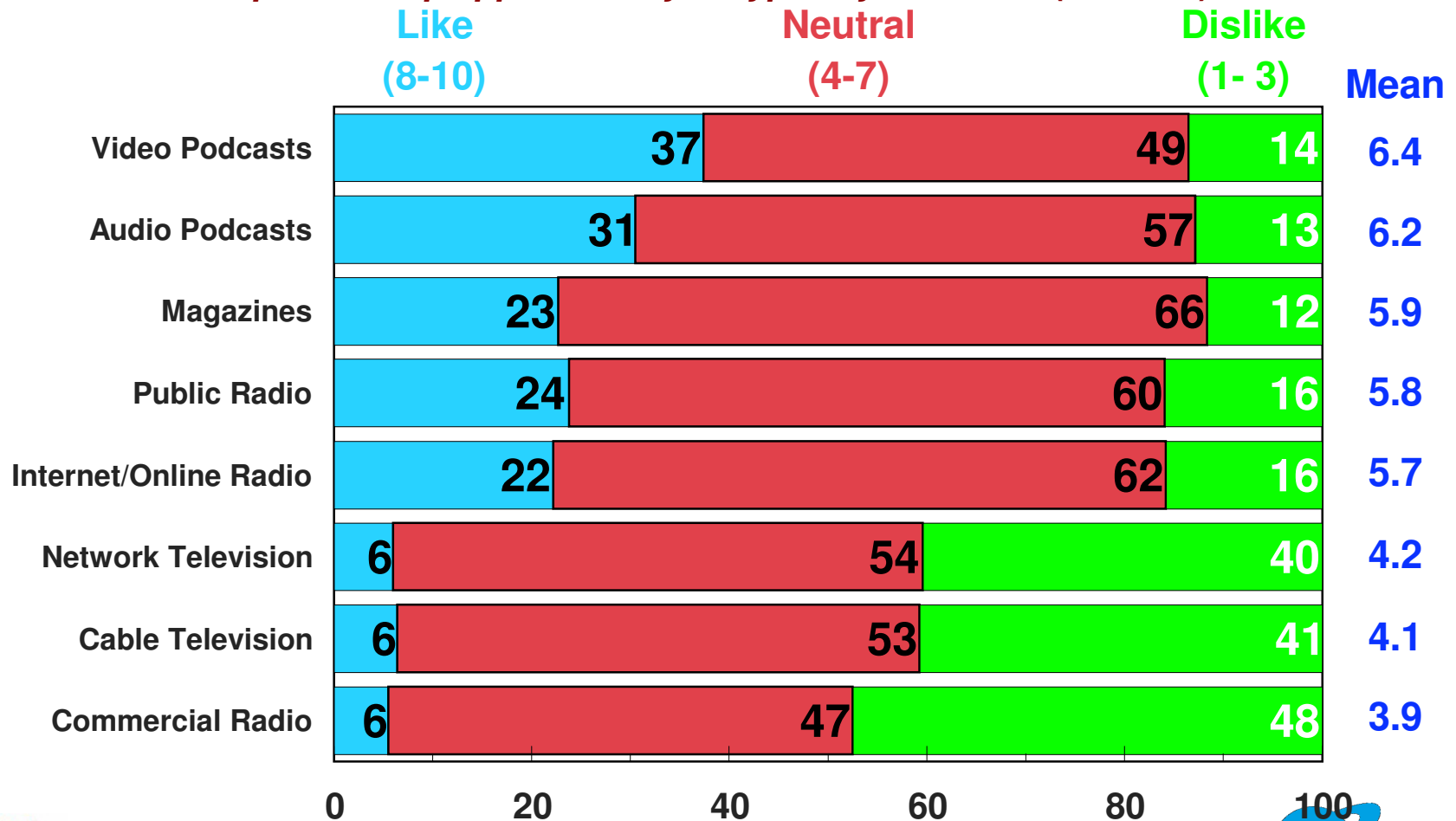
Section Three:

Advertising/Sponsorship Attitudes & Behaviors



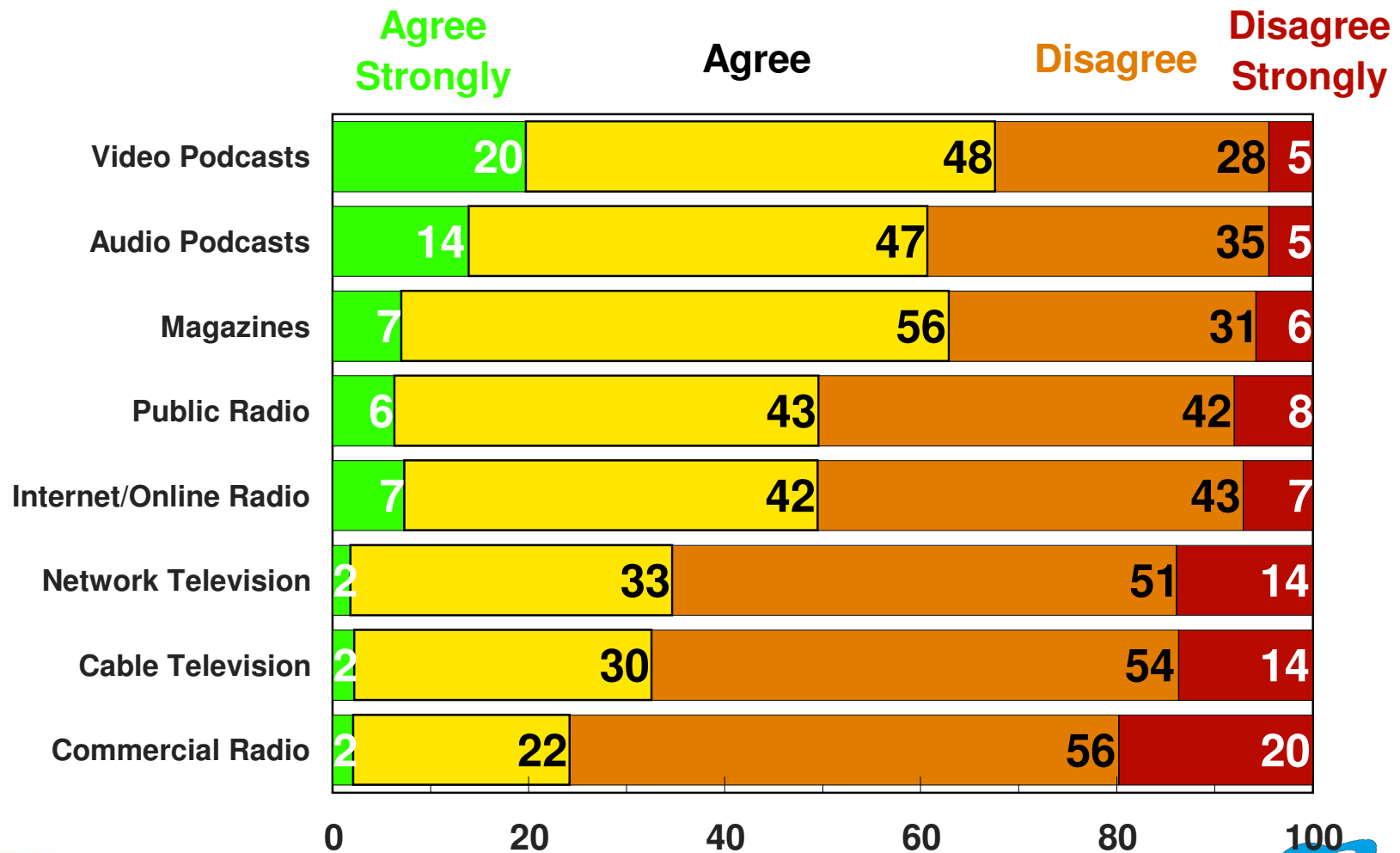
Advertising/Sponsorship Attitudes Summary

"On a scale of 1-to-10, please indicate how much you like or dislike the advertising or sponsorship approaches you typically notice on (medium)."

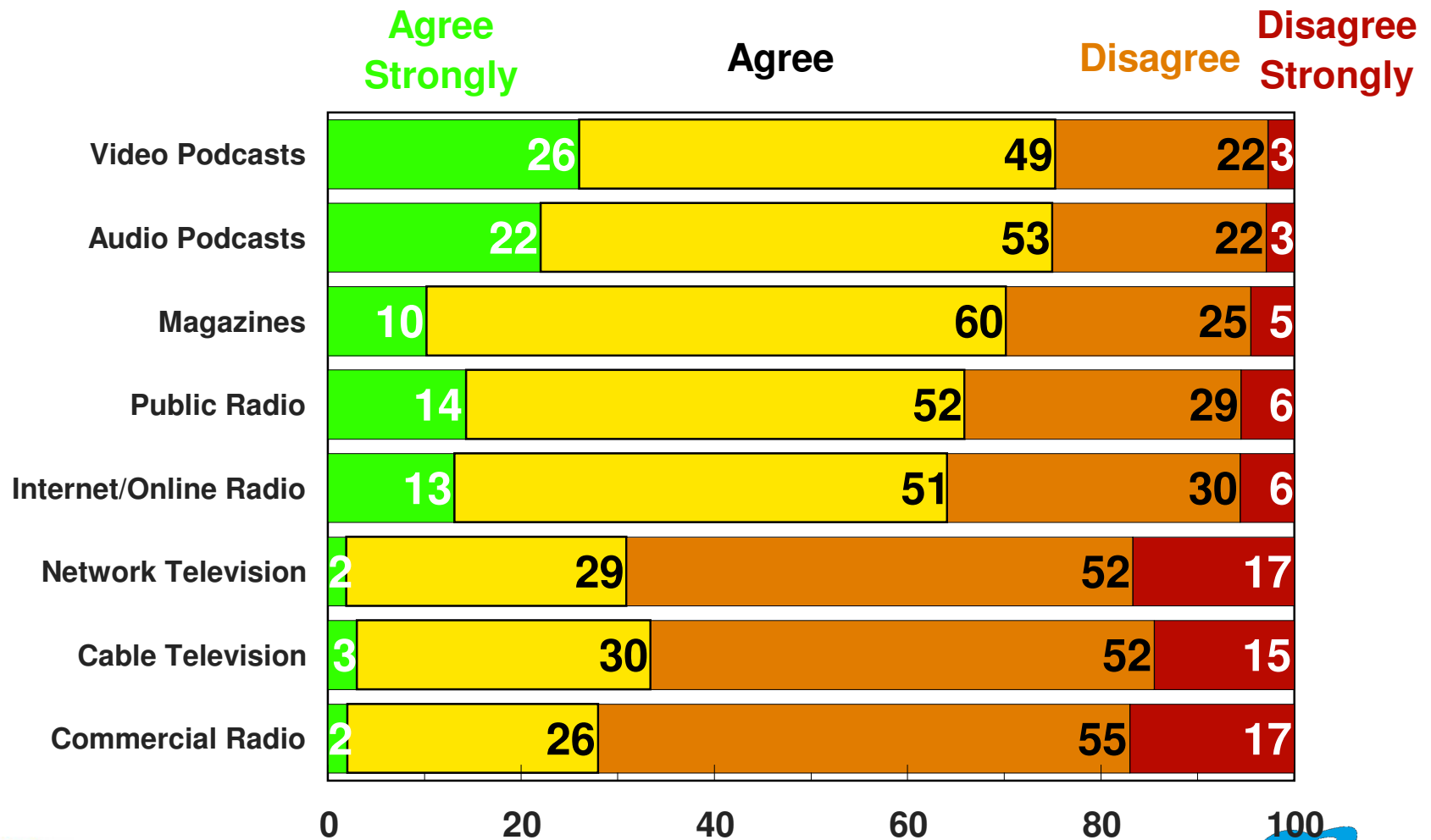




Agree/Disagree Summary: The products and services you hear advertisements or sponsorships for on (medium) are ones you personally use or purchase

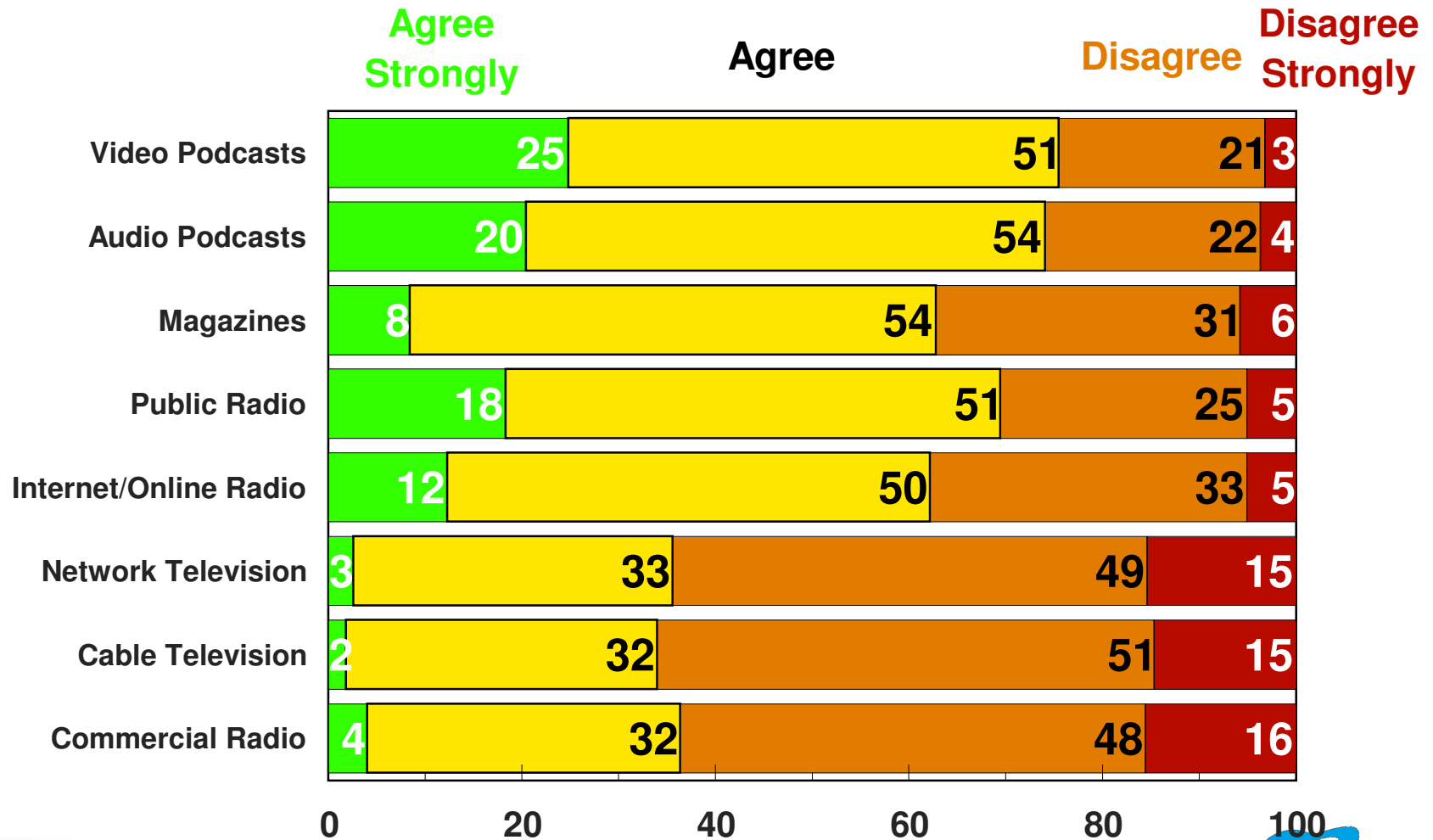


Agree/Disagree Summary: The products and services you learn about on (medium) are generally relevant to your interests



Base: Regularly consume medium

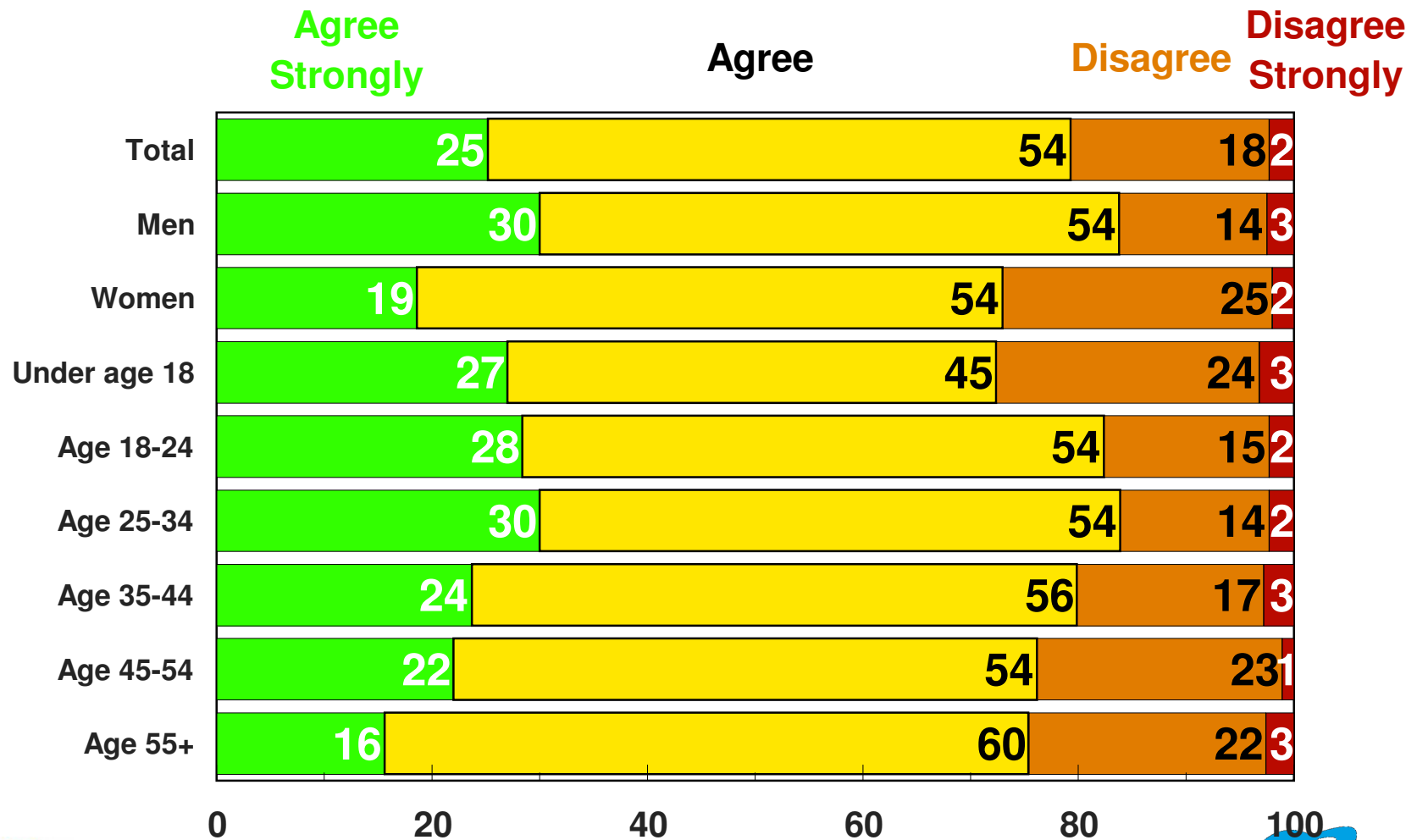
Agree/Disagree Summary: You are more willing to consider products and services after you learn about them on (medium)





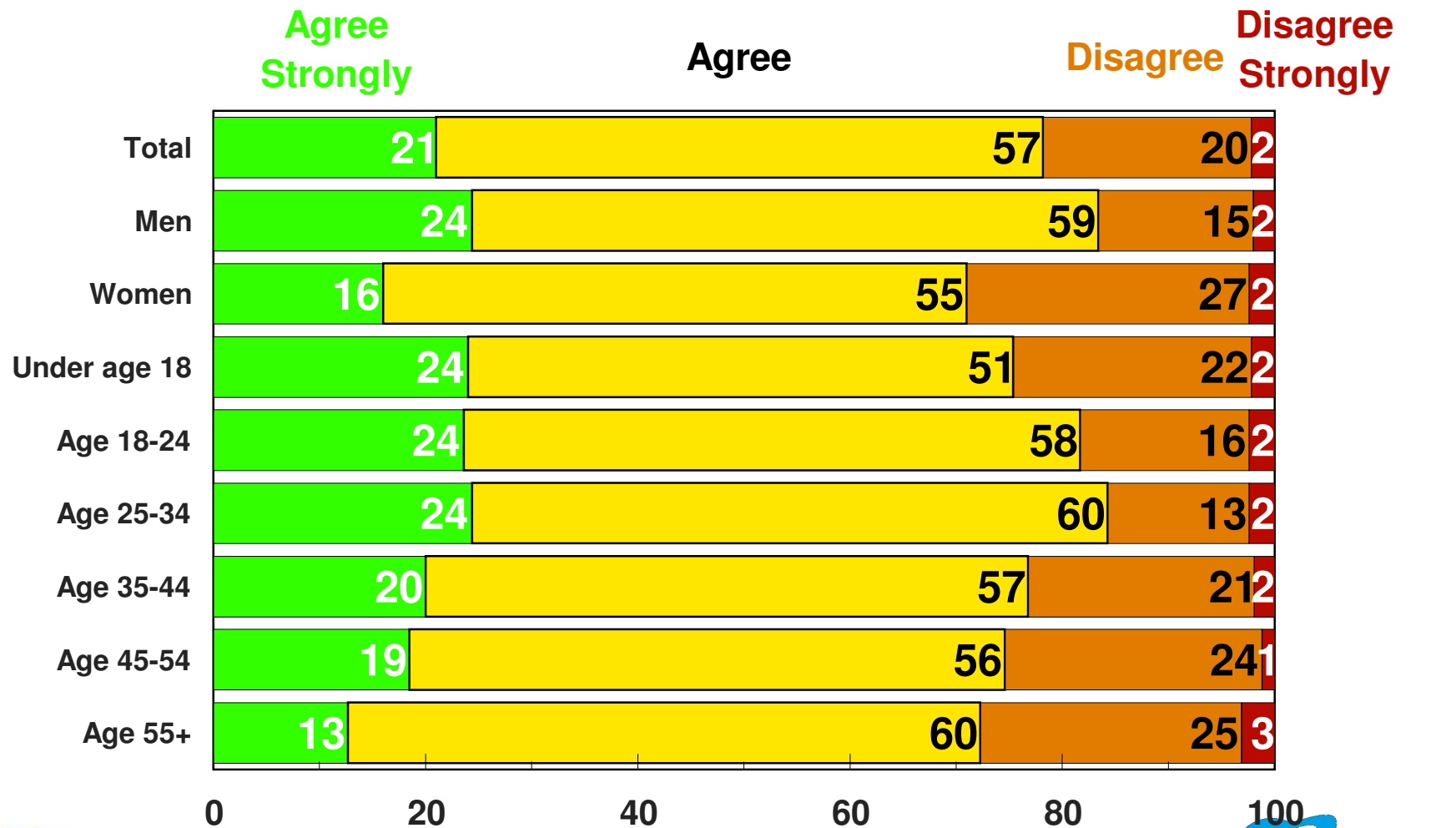
Agree/Disagree:

When price and quality are equal, you prefer to buy products from companies that advertise on or sponsor the podcasts you regularly listen to or watch

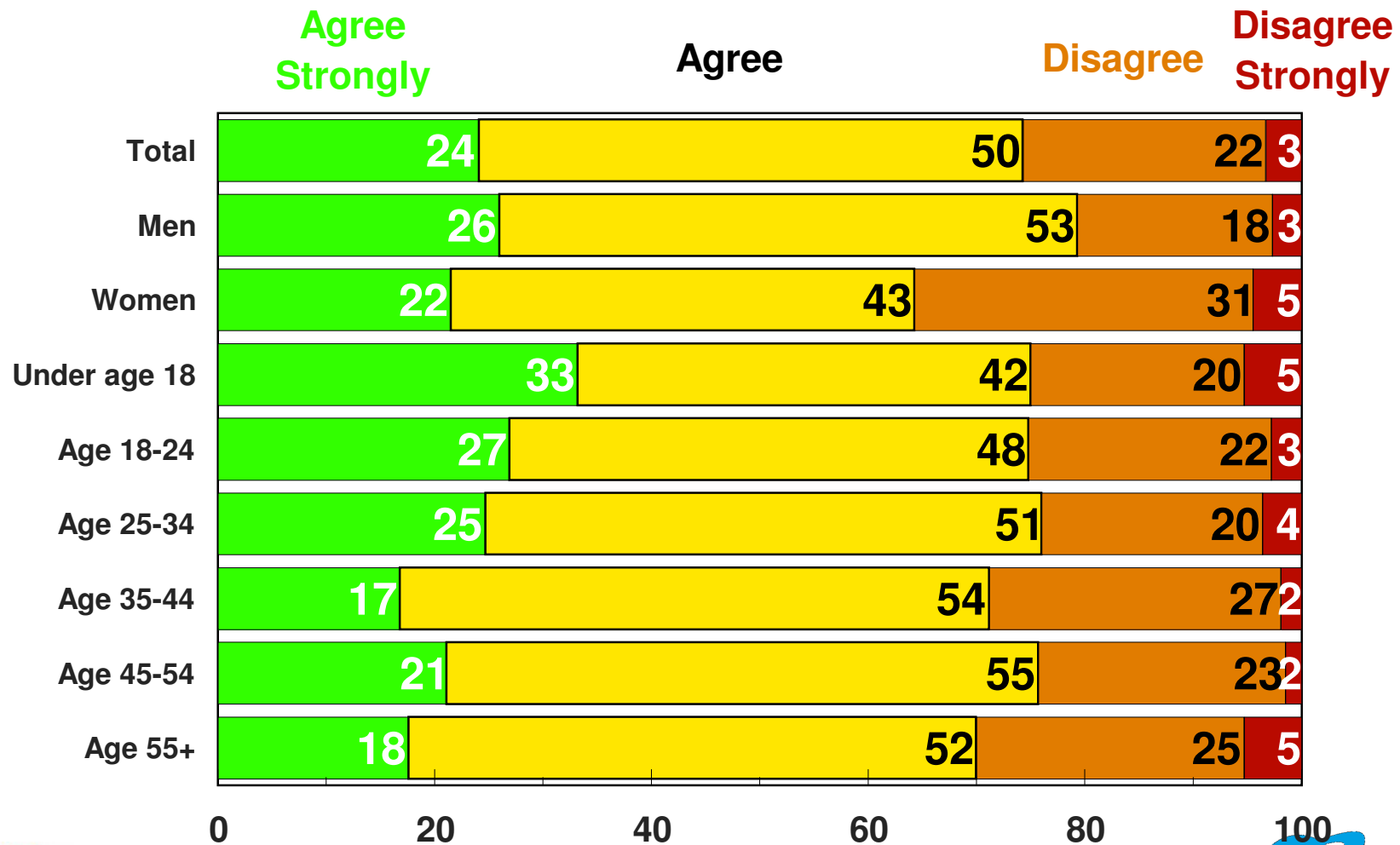




Agree/Disagree: Your opinion of a company is more positive when you hear it mentioned on one of the podcasts you regularly listen to or watch

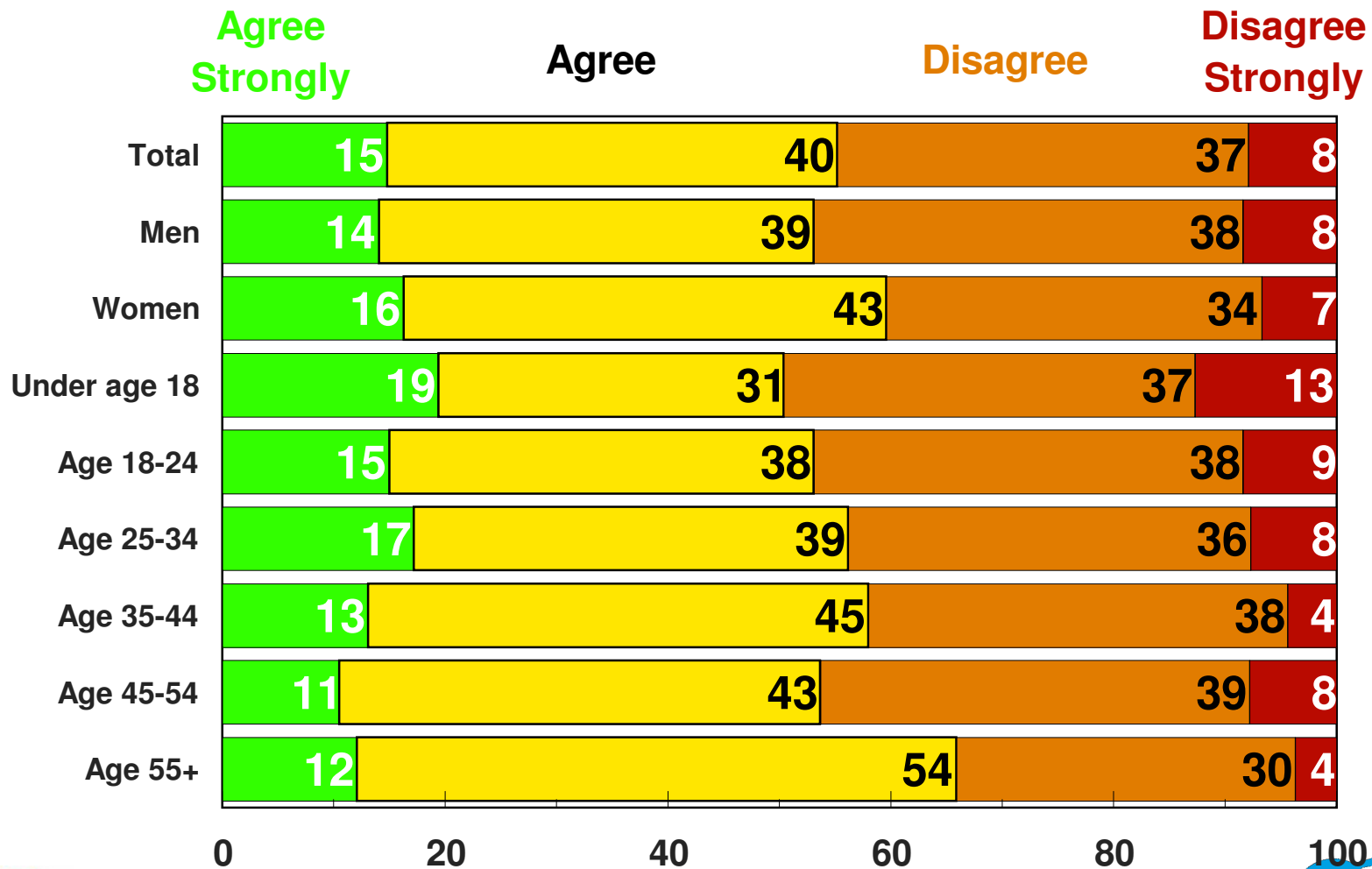


Agree/Disagree: You believe that the hosts of the podcasts you regularly consume are actual users of the products/services mentioned on their programs

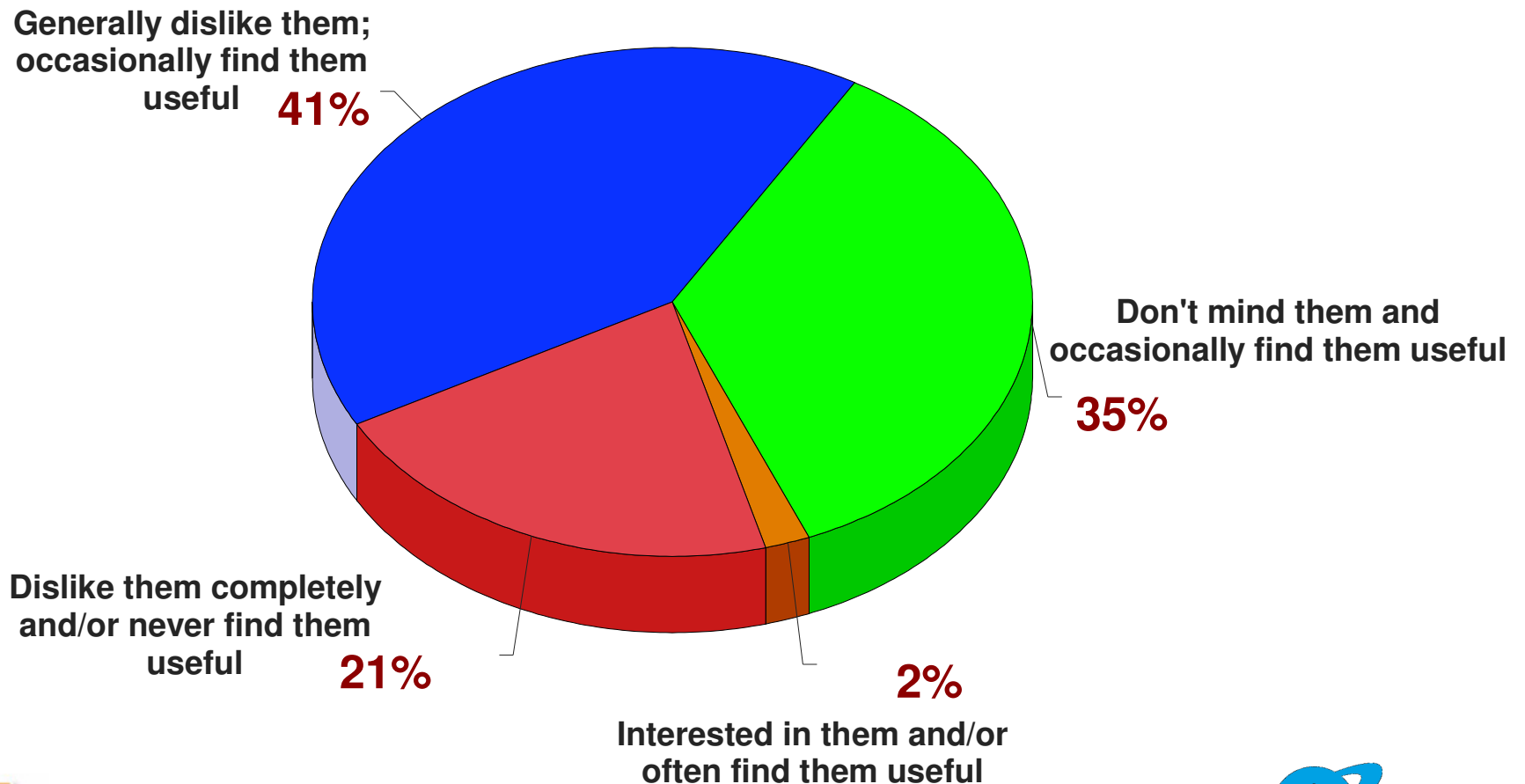




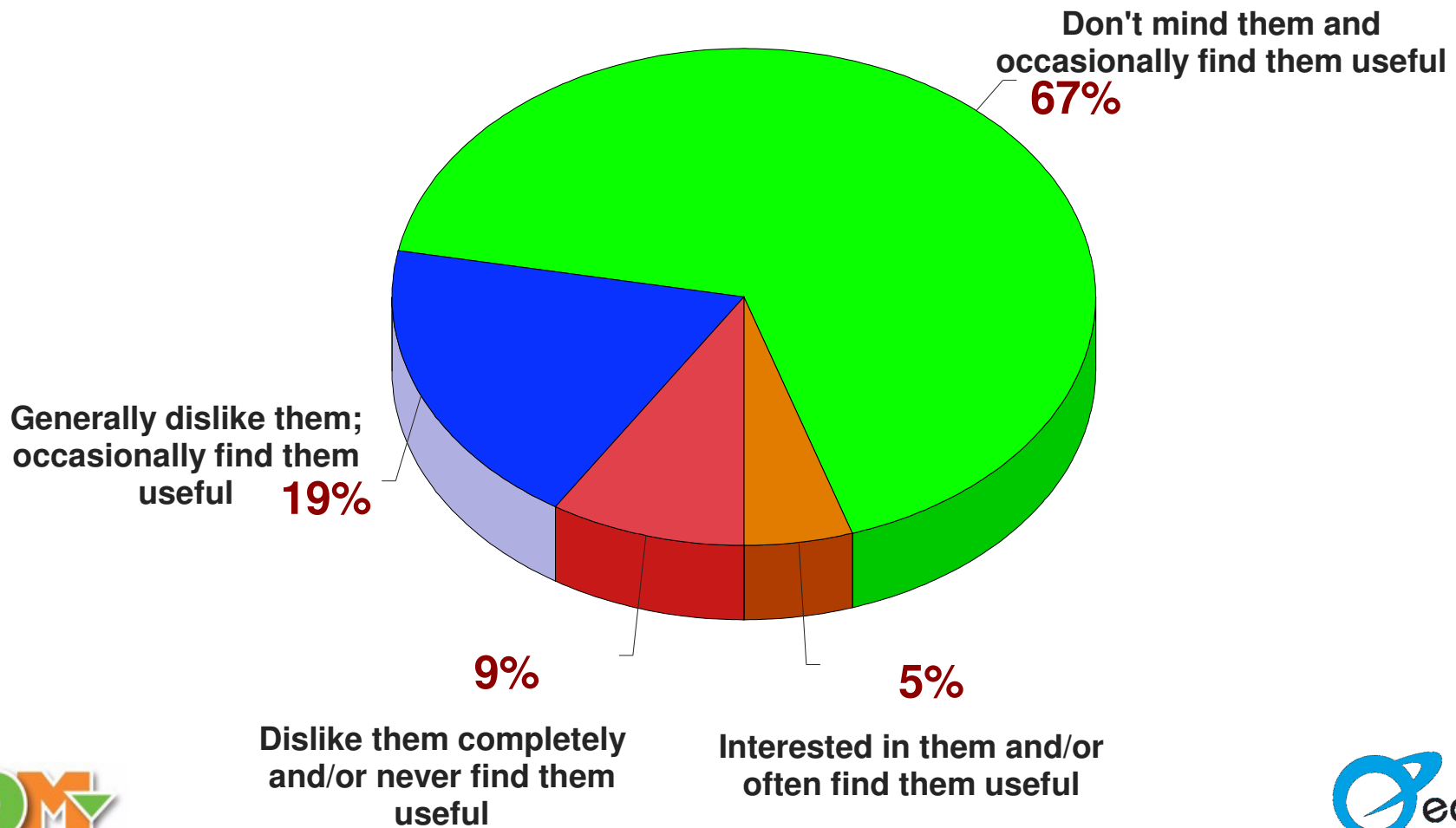
Agree/Disagree: When you hear the hosts of podcasts talk about products and services, you assume they have been paid to discuss them



How do you feel about pre-recorded advertisements from a brand, company or sponsor, when you hear or see them on podcasts you regularly listen to or watch?

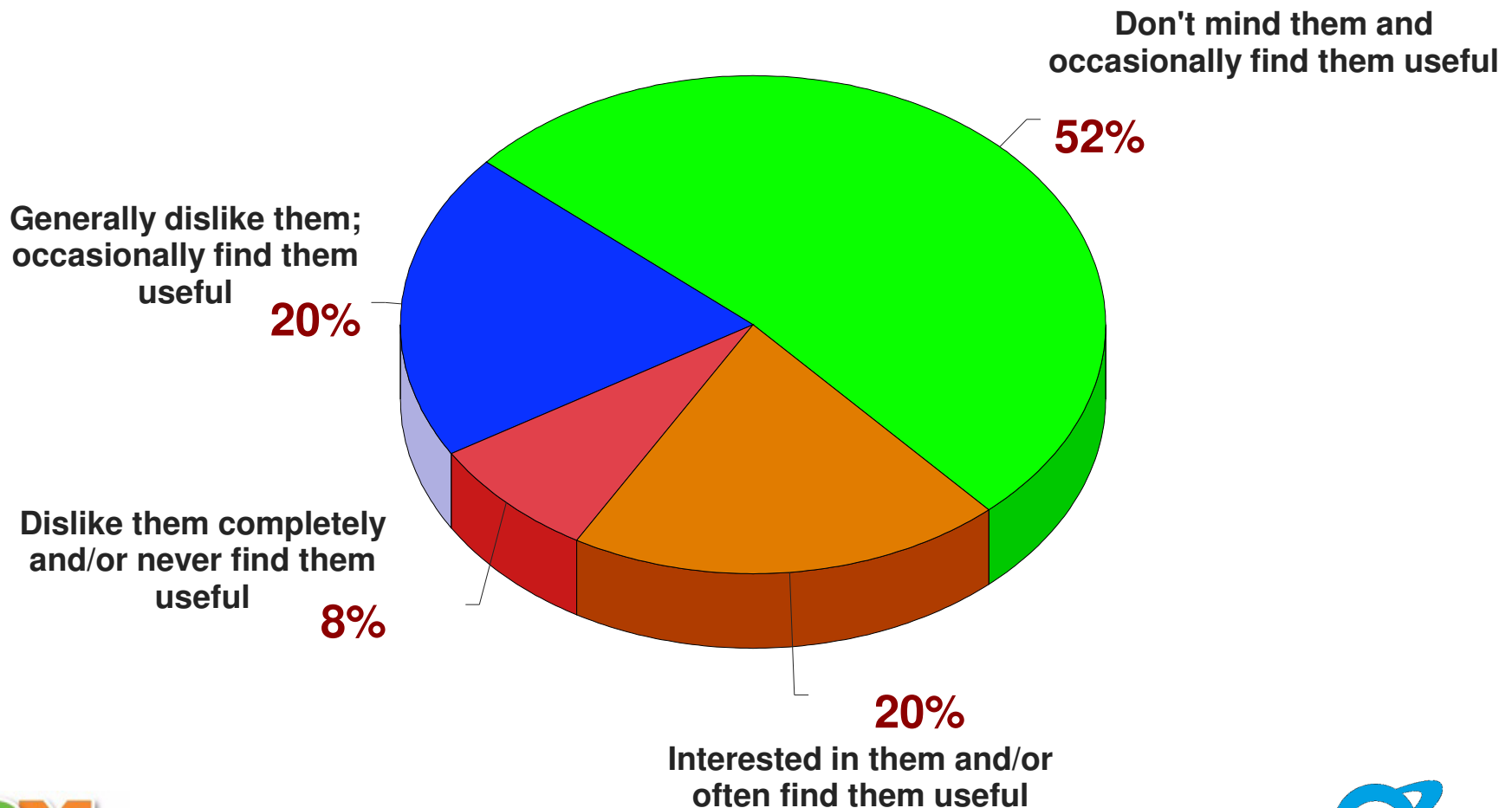


How do you feel about sponsorship messages (e.g., 'This program is brought to you by...') when you hear or see them on podcasts you regularly listen to or watch?



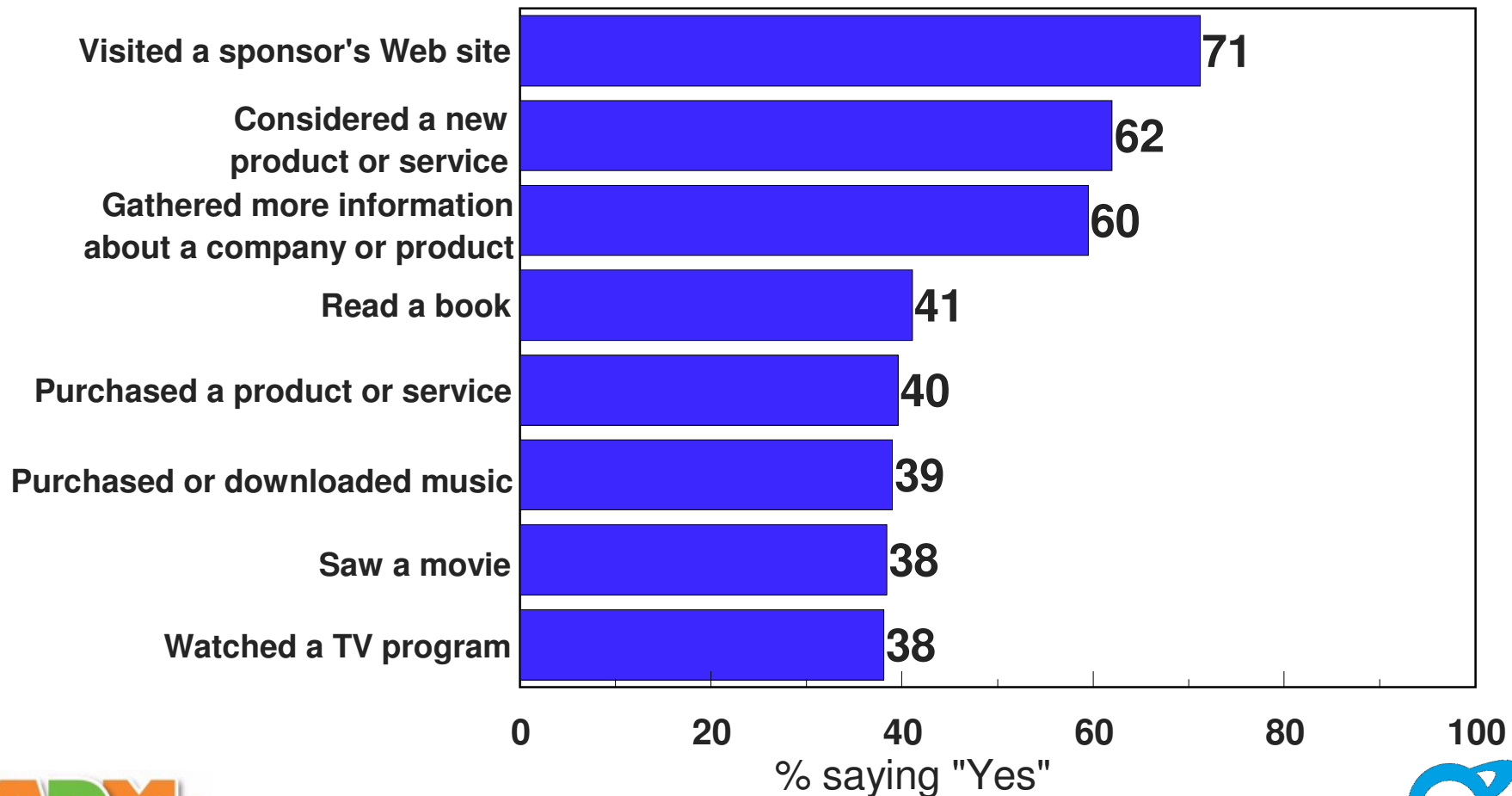


How do you feel about mentions of products and services that are discussed by the host(s) of the podcasts you regularly listen to or watch?



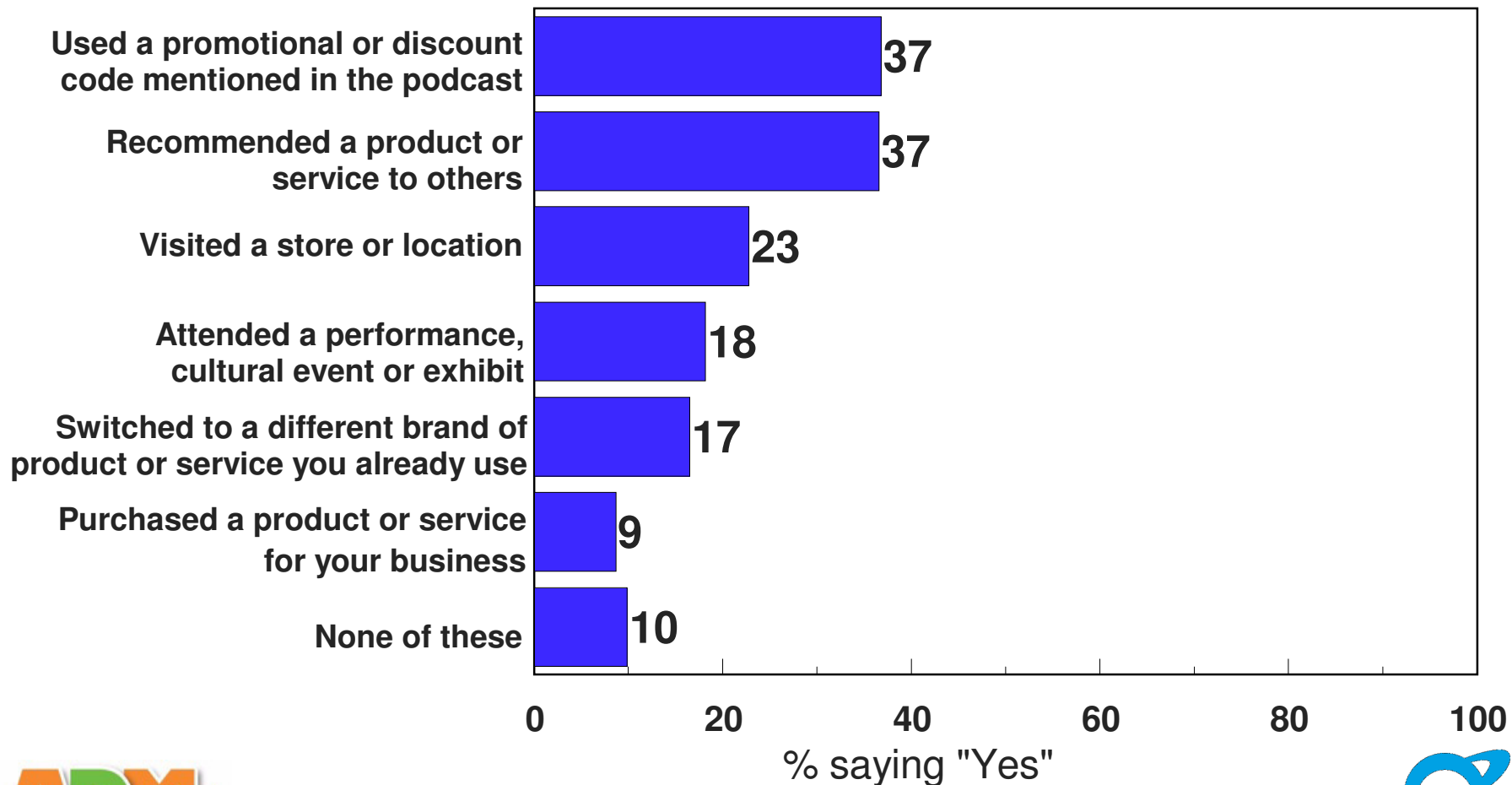
Which if any of the following actions have you taken as a result of sponsorship or advertising you have heard or seen in the podcasts you enjoy?

Page 1 of 2



Which if any of the following actions have you taken as a result of sponsorship or advertising you have heard or seen in the podcasts you enjoy?

Page 2 of 2





The Big Picture:

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- Active Podcast consumers are mobile media consumers - and content creators and advertisers alike should continue to take advantage of that fact
- Active podcast consumers are not receptive to interrupt advertising, but they are receptive to targeted messages in podcasts
- There is a "halo" effect ascribed to brands, products and services that sponsor podcasts
- Host-read sponsorships are remarkably effective with these active consumers, and should be priced accordingly



Thank You.

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How you know.SM