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THE PODCAST STUDY: GROWTH

STRATEGIES FOR DISCOVERY, TRIAL & CONVERSION

SEPTEMBER 25, 2025

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Hal Rood – *Partner, Strategic Solutions Research*

September 29,
2025

• OBJECTIVES OF THE PODCAST STUDY

1. Grow usage with existing audience
2. Grow reach and expand the audience



PREVIEW THE PODCAST STUDY PART 2

- We're projecting huge growth in podcast trial.
- People most typically use podcasts for an escape.
- There needs to be improvement in helping fuel discovery and trial.
- Social Media & Friends/Family are the biggest drivers of discovery – but only one leads for trial.
- Trial usage is critical and a lack of top-of-mind is holding trial back.
- Product execution mistakes cause a “leaky bucket” and unhealthy conversion.



• METHODOLOGY THE PODCAST STUDY

- July 2025
- Adults 18-54
- Sample Size: 1,200
- Sample weighted to most recent US census
- All listen to podcasts monthly – 88% listen weekly or daily



THE PODCAST ENVIRONMENT:

- **MOMENTUM FOR THE MEDIUM**
- **WHY LIGHT USERS ARE NOT CONSUMING MORE**

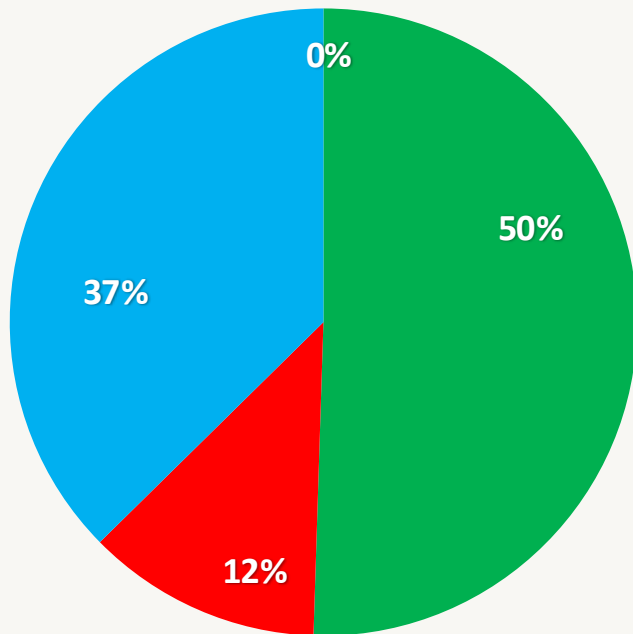
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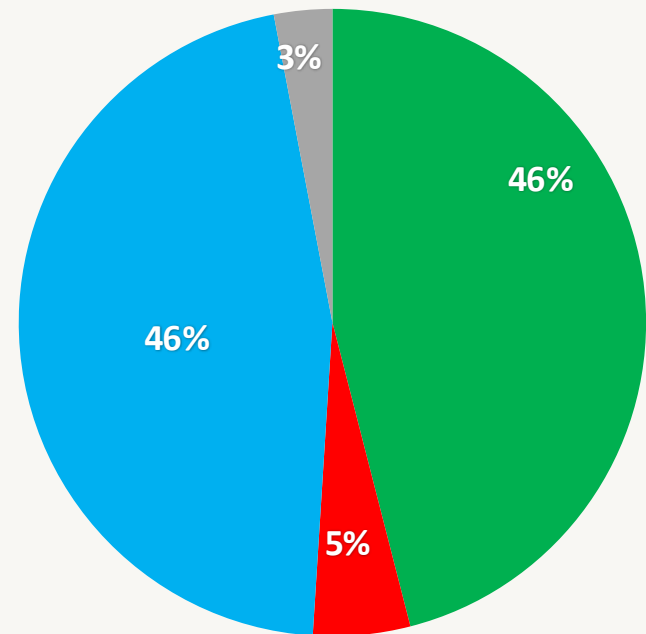
PODCAST MOMENTUM TOTAL SAMPLE

Are you listening to/watching podcasts more, less or about the same amount of time compared to one year ago?



More
Less
About the same
Don't know

As you look ahead to the future, do you expect to listen to/watch podcasts more, less or about the same as you do today?



More
Less
About the same
Don't know

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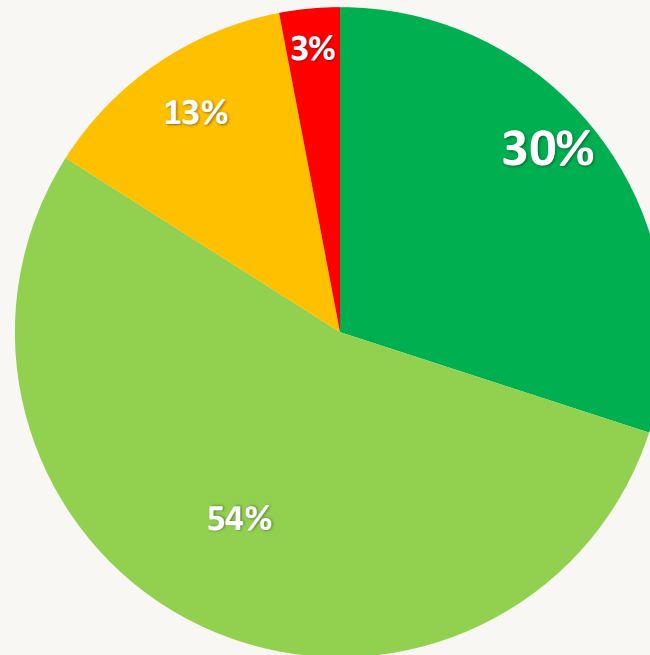
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PODCAST MONTHLY USERS **PROJECTED USE**

How likely are you to start listening to/watching NEW or DIFFERENT podcasts compared to your current listening?

Sample listens to podcasts monthly.



**Very likely to
consume new
podcasts.**

■ Very Likely ■ Somewhat Likely ■ Somewhat Unlikely ■ Very Unlikely

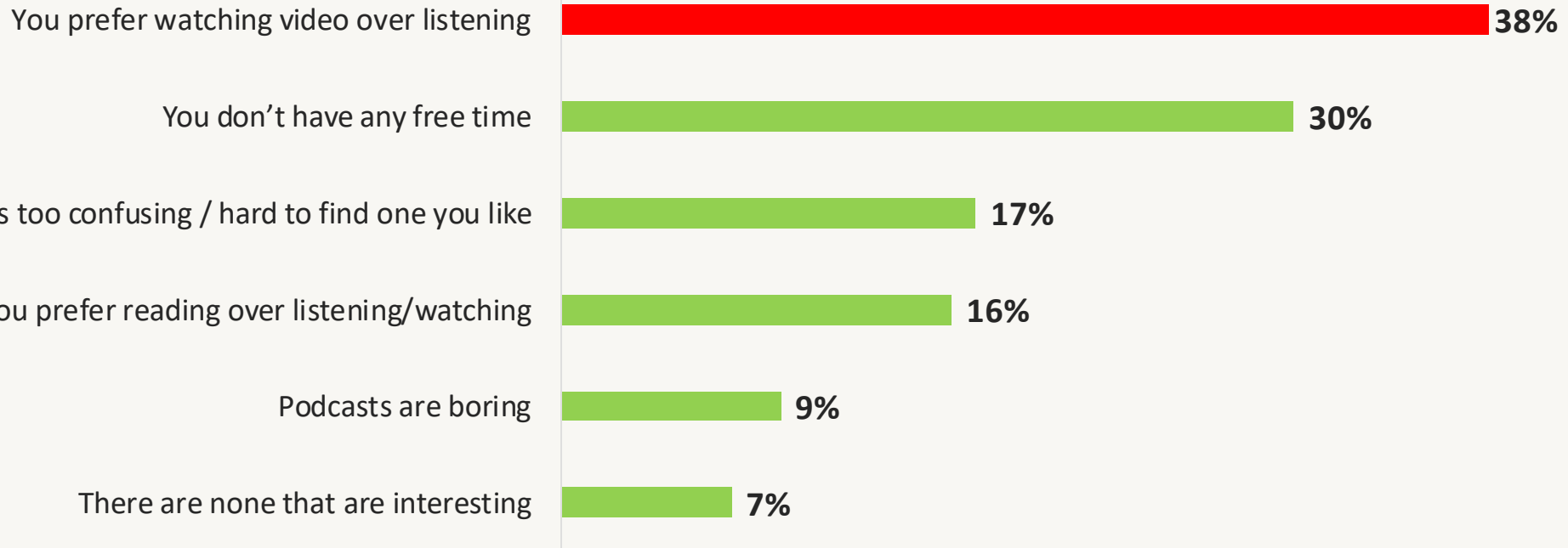
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PODCAST DISCOVERY NON PODCAST USERS

WHY don't you listen to/watch podcasts on a more regular basis? Select all that apply.

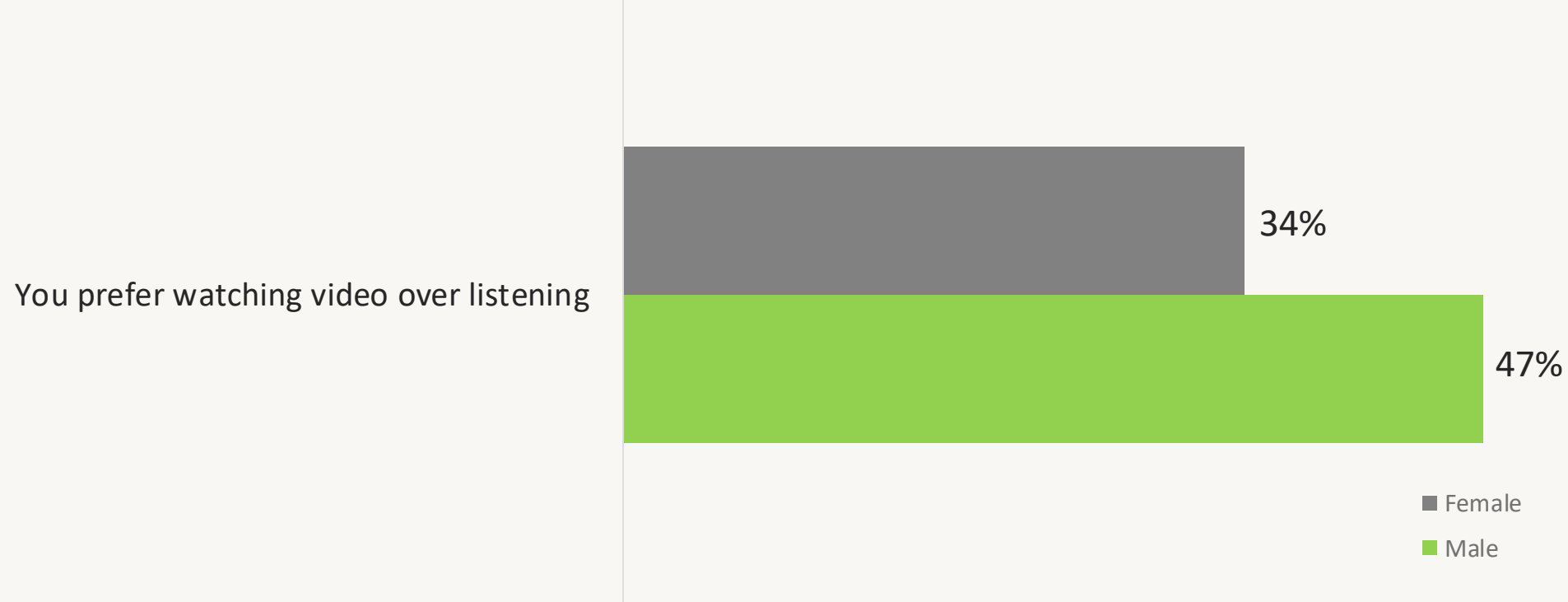
Those who only consume podcasts monthly...not weekly.



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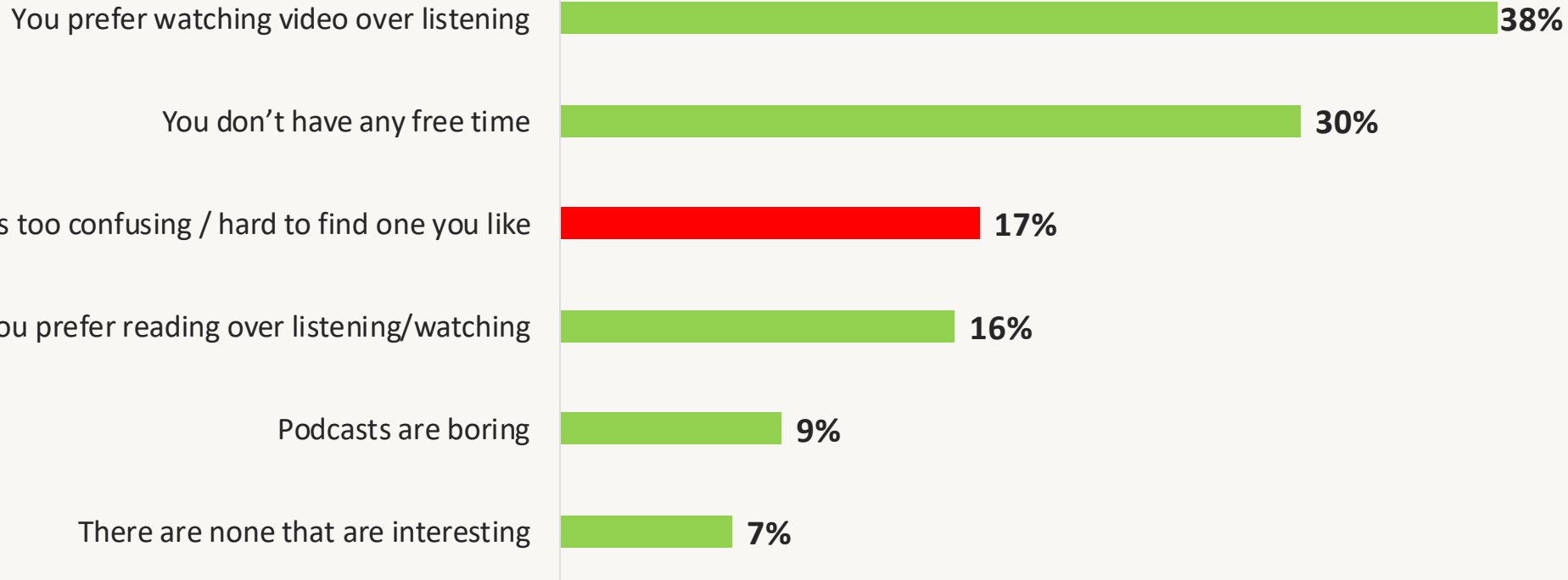
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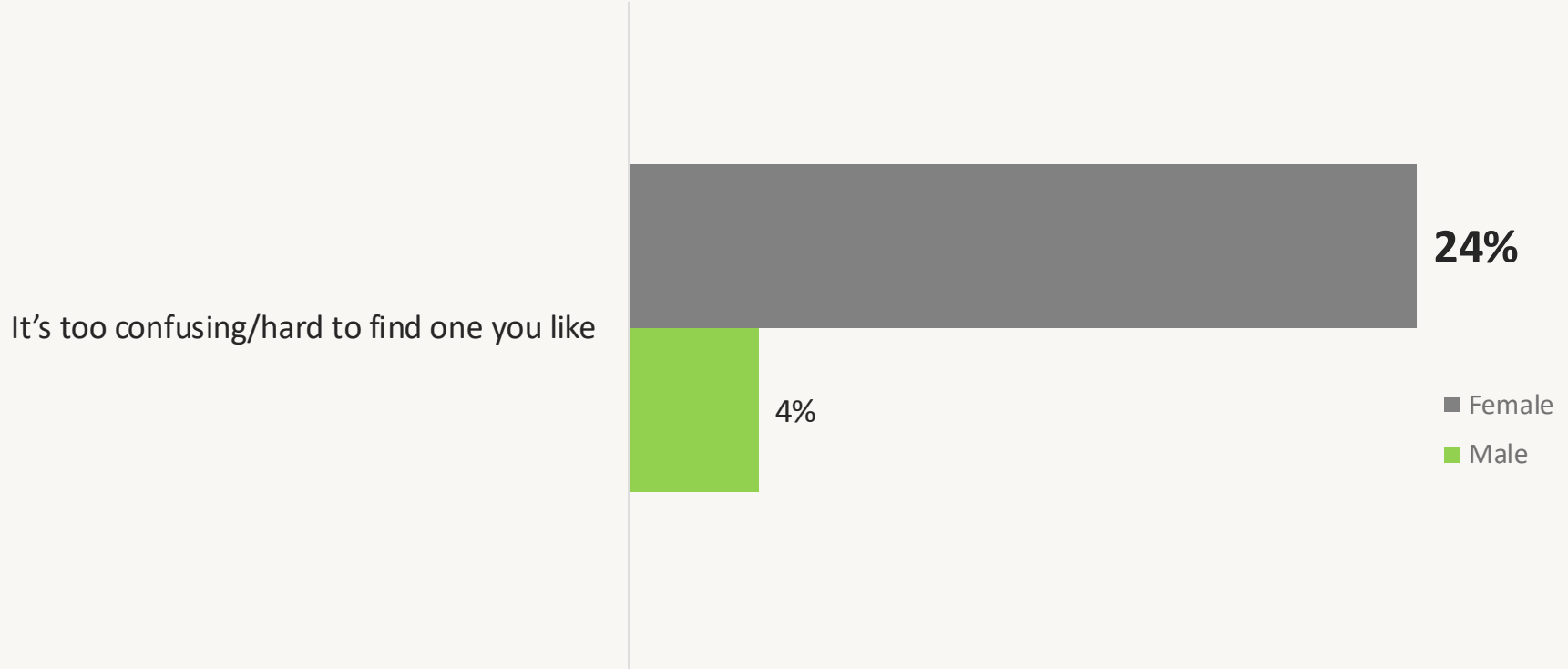
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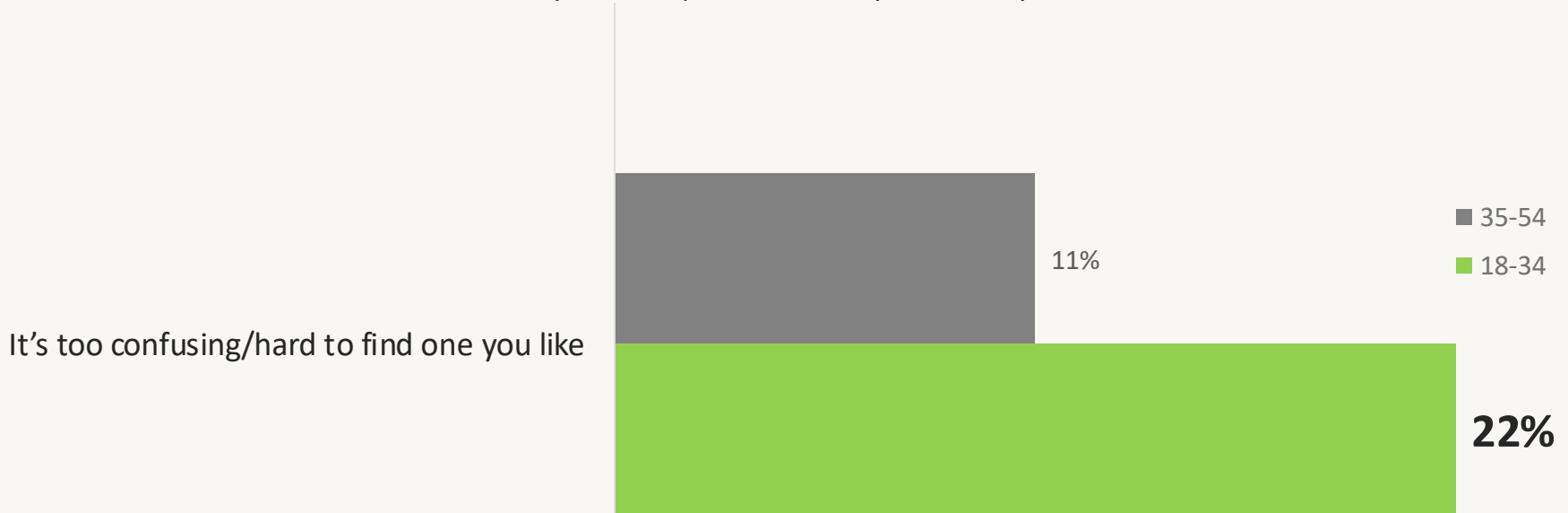
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THE PODCAST ENVIRONMENT:

- BIGGEST USAGE DRIVERS
- BIGGEST GENRES

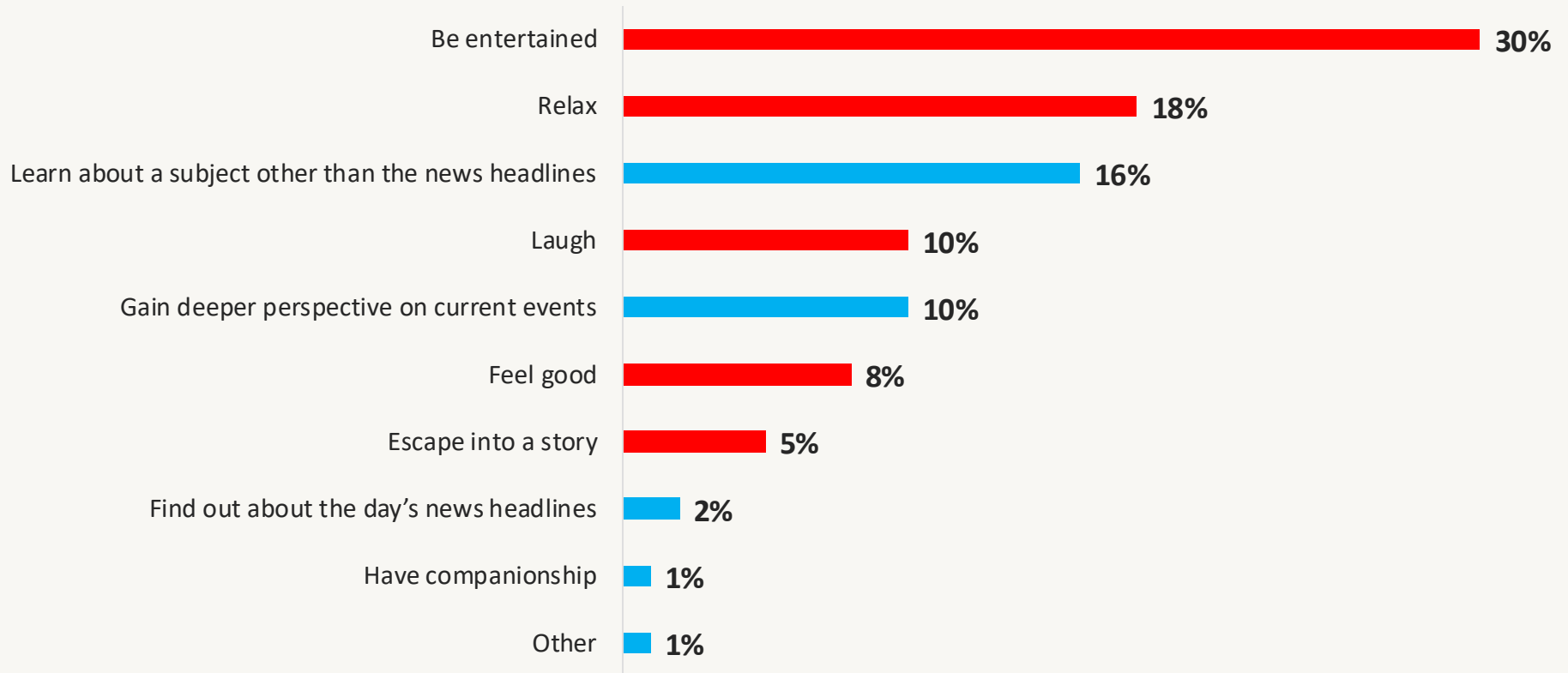
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PODCAST BIGGEST DRIVERS

Which of the following is the biggest reason why you use podcasts?



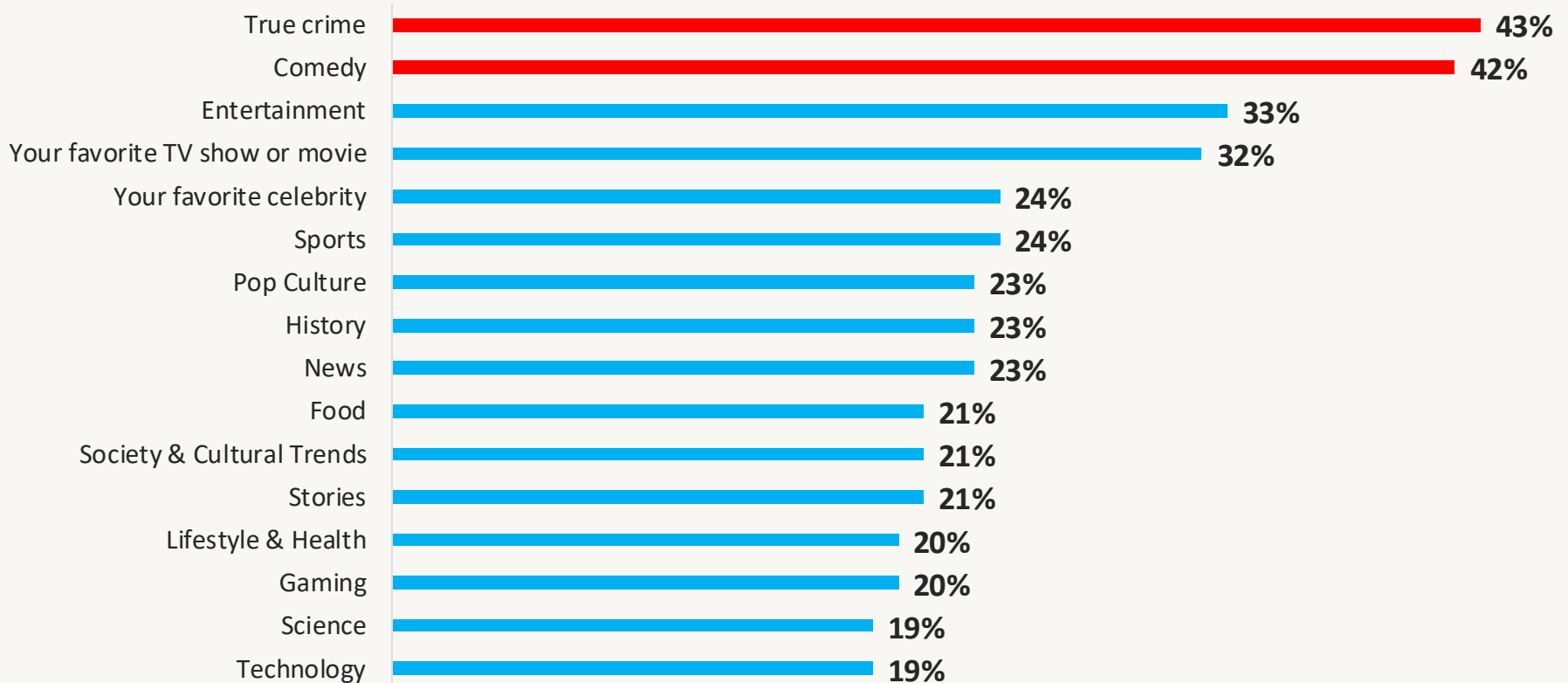
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PODCAST PREFERRED GENRE TOTAL SAMPLE

Which podcast genre are you most interested in? Select any of the following genres that you would listen to/watch A LOT:



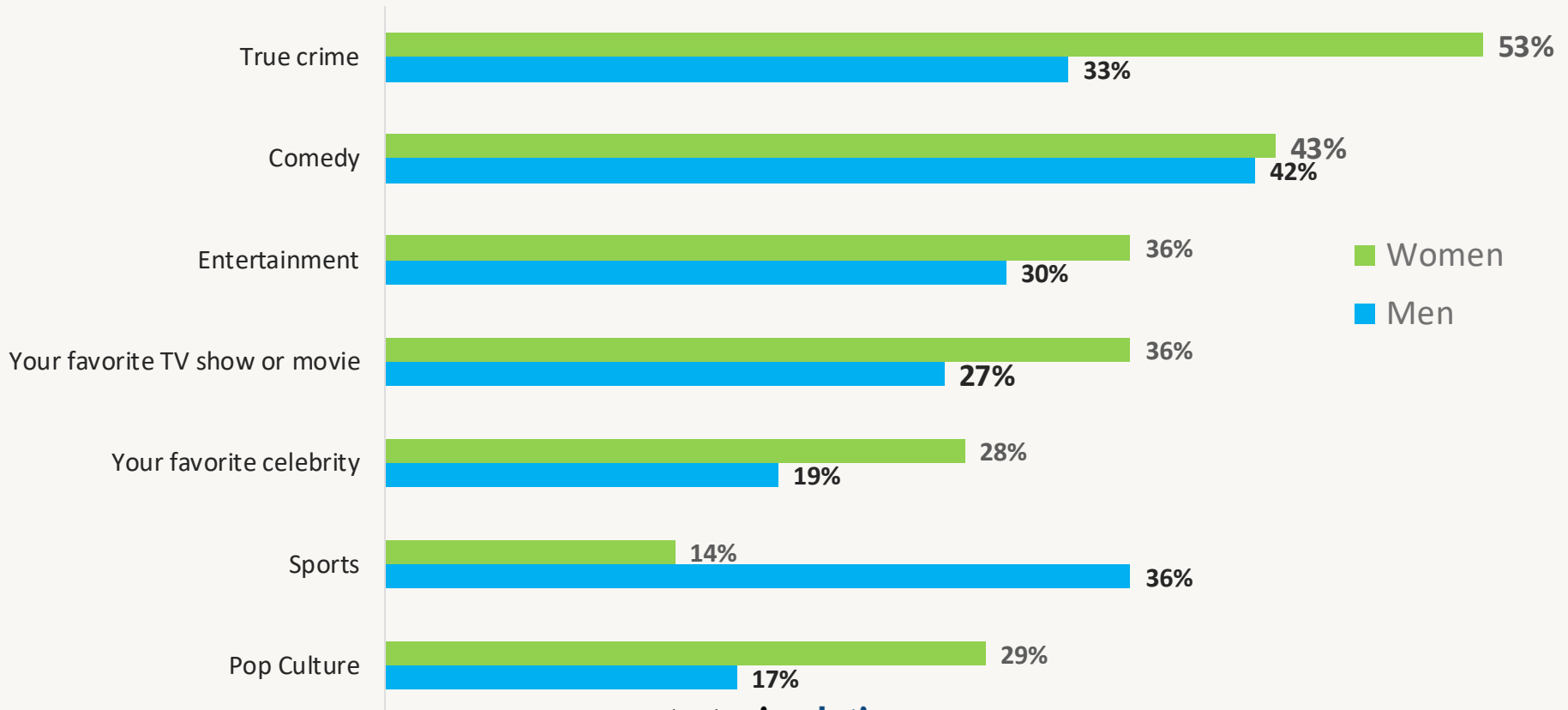
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A woman with short, dark, spiky hair and a teal top is seated on the left, gesturing with her hands while speaking into a microphone. A man with short dark hair, wearing a dark hoodie, is seated on the right, listening and looking towards her. They are in a studio setting with a warm, orange-toned background light and a potted plant. A table in the foreground holds a glass of water and a small white object.

PODCAST DISCOVERY

WHAT DRIVES AWARENESS & TRIAL?

PODCAST **DISCOVERY** TOTAL SAMPLE

Select the top three ways you discover podcasts that are new to you.

	TOTAL
Ad on Social Media	62%
Friends & Family	57%
Suggestions from the platform where you get podcasts	35%
Ad during another podcast	25%
Co-Workers	17%
Acquaintances	16%
Ad during a music stream	12%
Ad on TV, billboards, buses, etc	11%

Which would cause you to be VERY LIKELY to try a podcast?

	TOTAL
Friends & Family	59%
Ad on Social Media	33%
Suggestions from the platform where you get podcasts	30%
Ad during another podcast	21%
Co-Workers	21%
Acquaintances	17%
Ad during a music stream	15%
Ad on TV, billboards, buses, etc	13%

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PODCAST **DISCOVERY** SOCIAL MEDIA

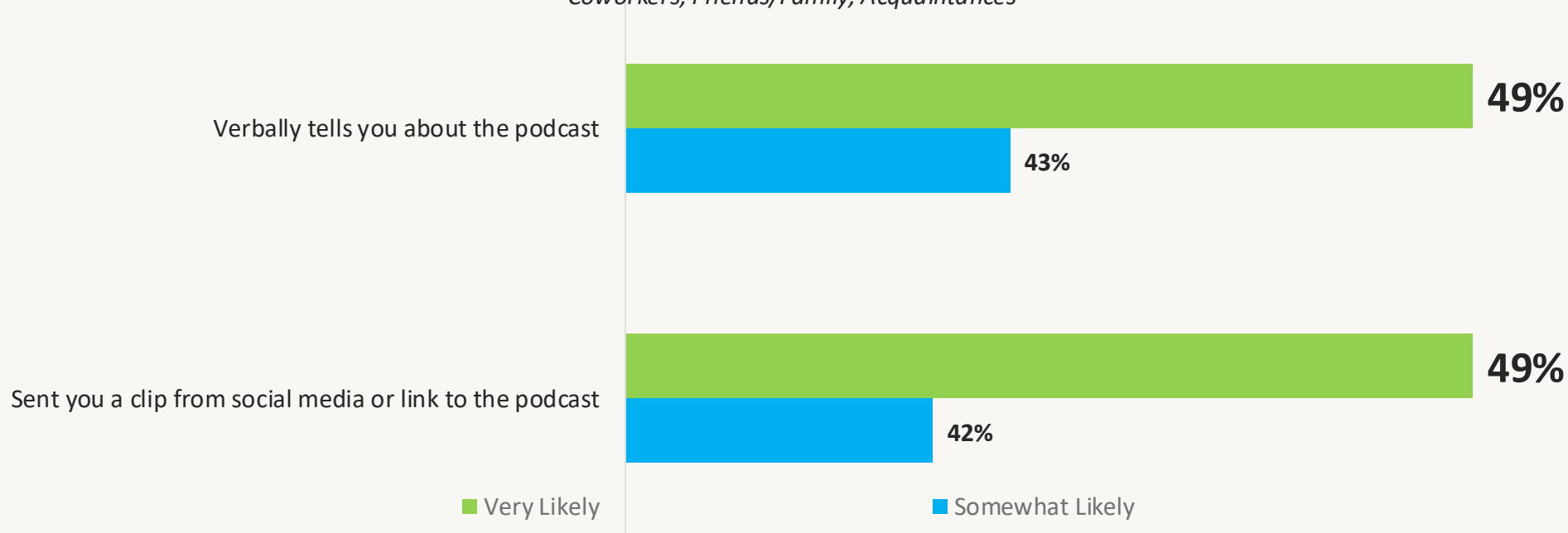
Which social media do you hear about new podcasts the most?

Sample Selected Social Media as Top 3 Ways to Discover New Podcasts, N=743	TOTAL	18-24	25-34	35-44	45-54	Male	Female
YouTube	30%	25%	27%	32%	34%	36%	24%
TikTok	18%	37%	21%	9%	10%	7%	27%
Instagram	17%	17%	19%	18%	15%	16%	19%
Facebook	16%	4%	12%	21%	24%	19%	14%
X (Twitter)	8%	6%	11%	9%	4%	11%	5%
Reddit	4%	7%	4%	4%	3%	5%	3%
YouTube Shorts	2%	2%	1%	3%	3%	3%	2%
Facebook Reels	2%	-	2%	2%	3%	0%	3%
Snapchat	1%	1%	1%	1%	1%	1%	1%
Instagram Stories	0%	-	-	1%	1%	1%	0%

PODCAST **DISCOVERY** TOTAL SAMPLE

How likely would you be to try a podcast if someone you know:

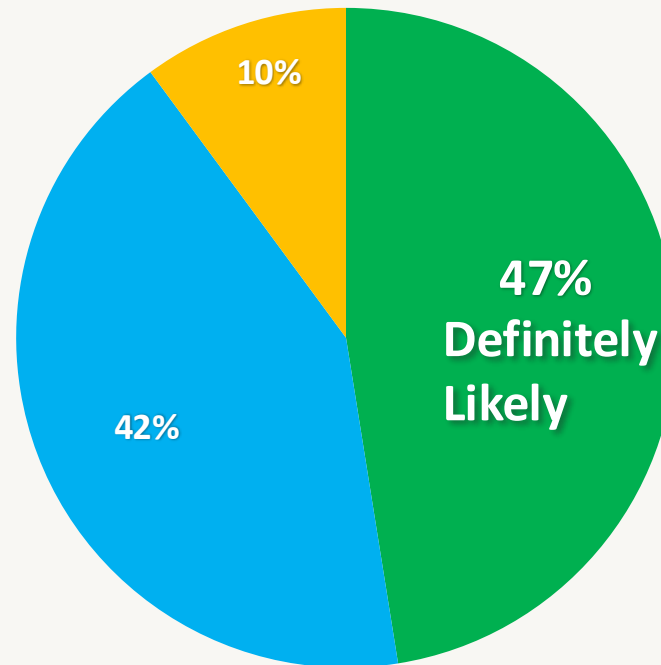
*Those “Very Likely” to try a podcast recommendation from
Coworkers, Friends/Family, Acquaintances*





PODCAST **DISCOVERY** TOTAL SAMPLE

Would seeing/hearing a short sample of a podcast make you more likely to try it?



■ Definitely

■ Probably

■ Makes no difference to you

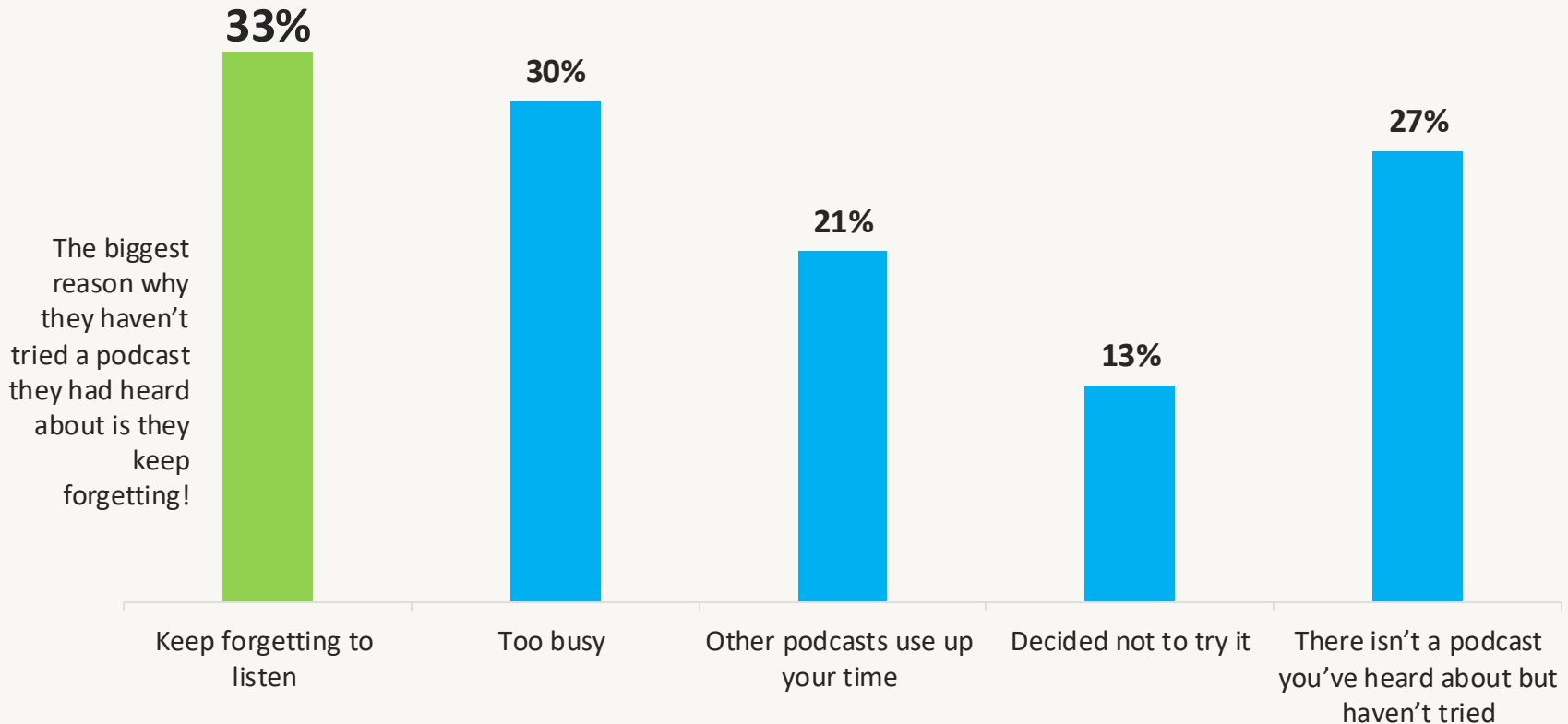
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PODCAST DISCOVERY

Is there a podcast you've heard about and are interested in, but have NOT tried? If yes, why haven't you tried it?



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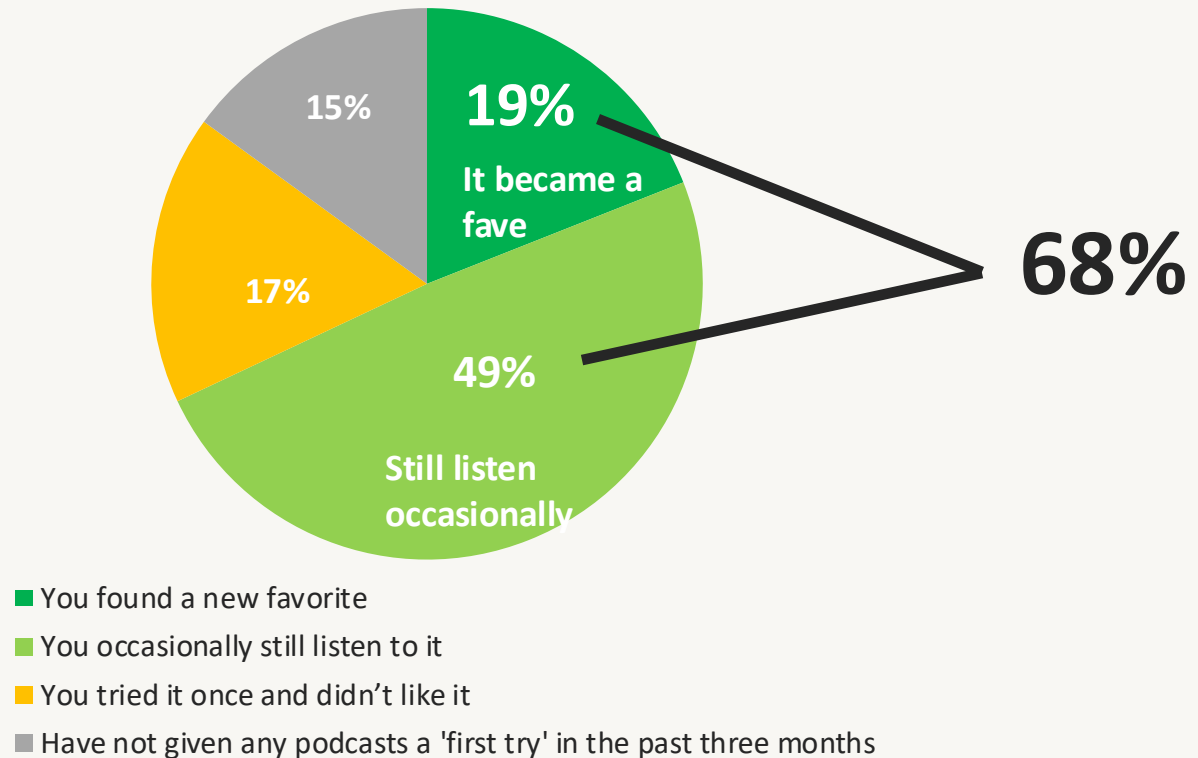
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PODCAST **FIRST IMPRESSION** TOTAL SAMPLE

When you think of the podcasts you have given a “first try” in the past three months, what was the result?

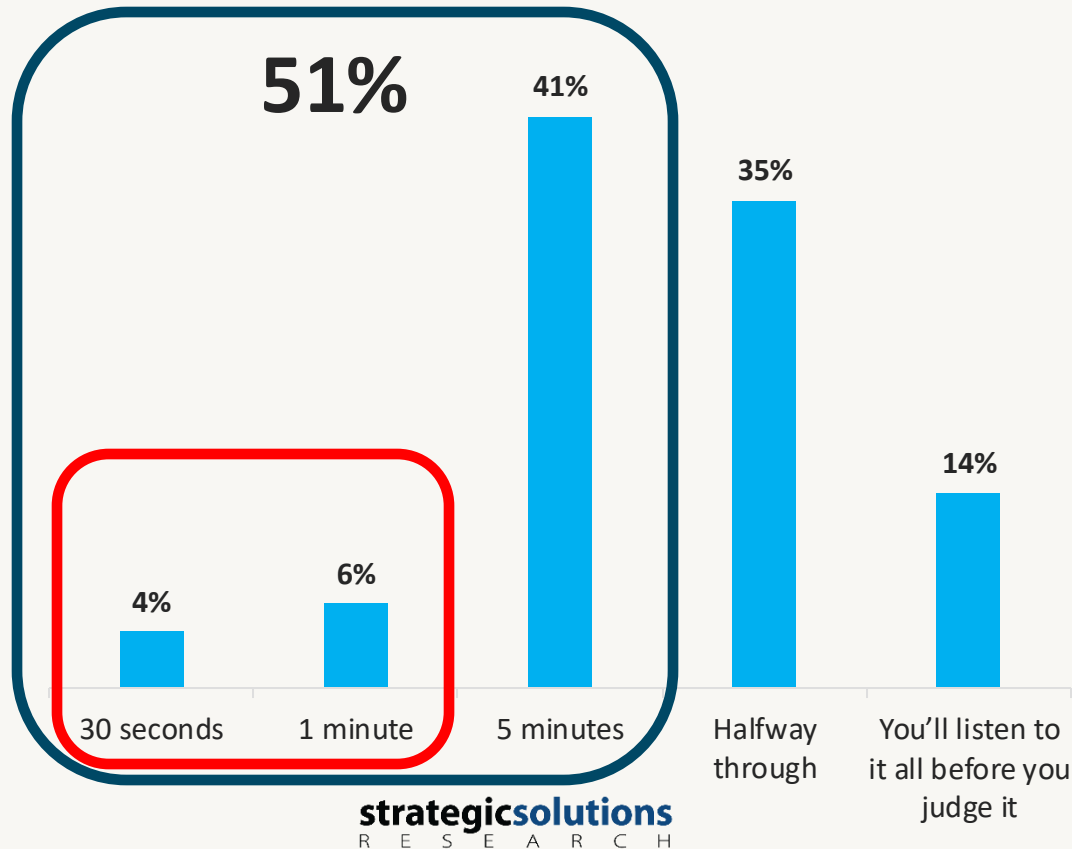


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PODCAST **FIRST IMPRESSION** TOTAL SAMPLE

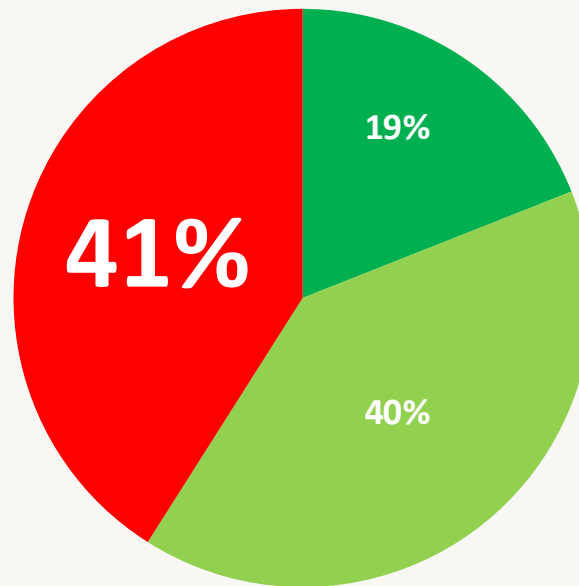
How much time will you listen to/watch a podcast for the first time before you give up on it?



PODCAST FIRST IMPRESSION

When you try a podcast for the first time and are disappointed, how likely are you to try it a second time?

4 of 10 will NOT give you a second chance if they are disappointed the first time.



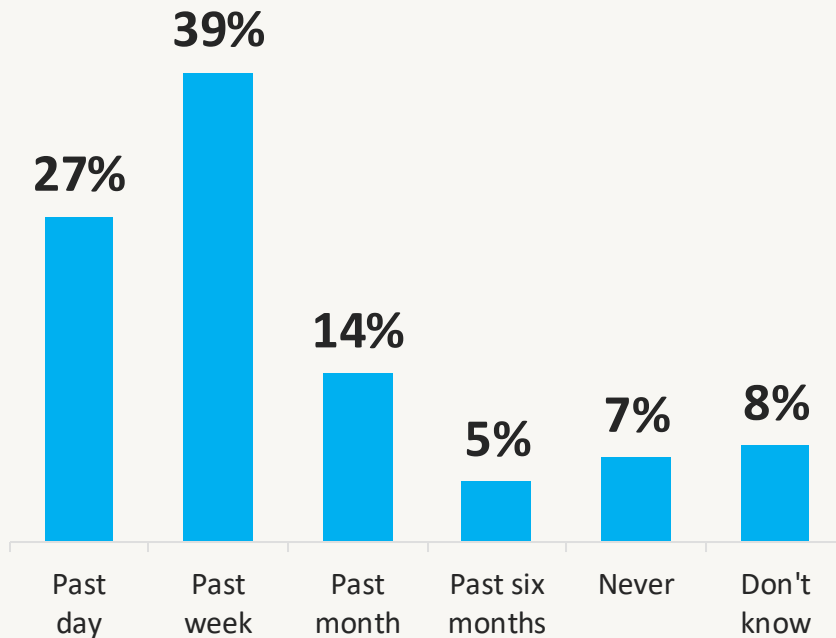
■ Very likely

■ Somewhat likely

■ Not likely

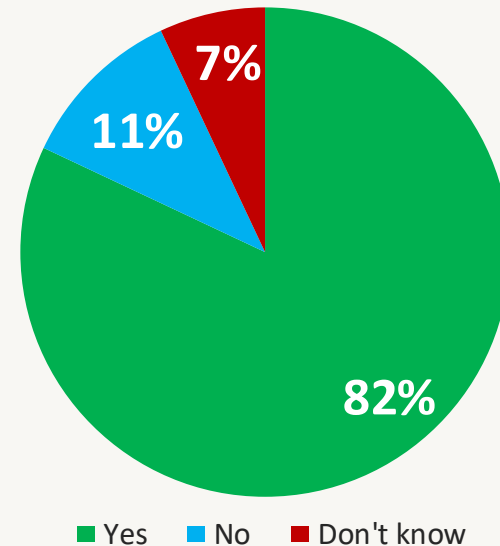
PODCAST POSTS ON SOCIAL MEDIA

When is the last time you saw a post from a podcast host on social media?



Did you find the post interesting or entertaining?

Sample said they'd seen a post within last 6 months,



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CONVERSION

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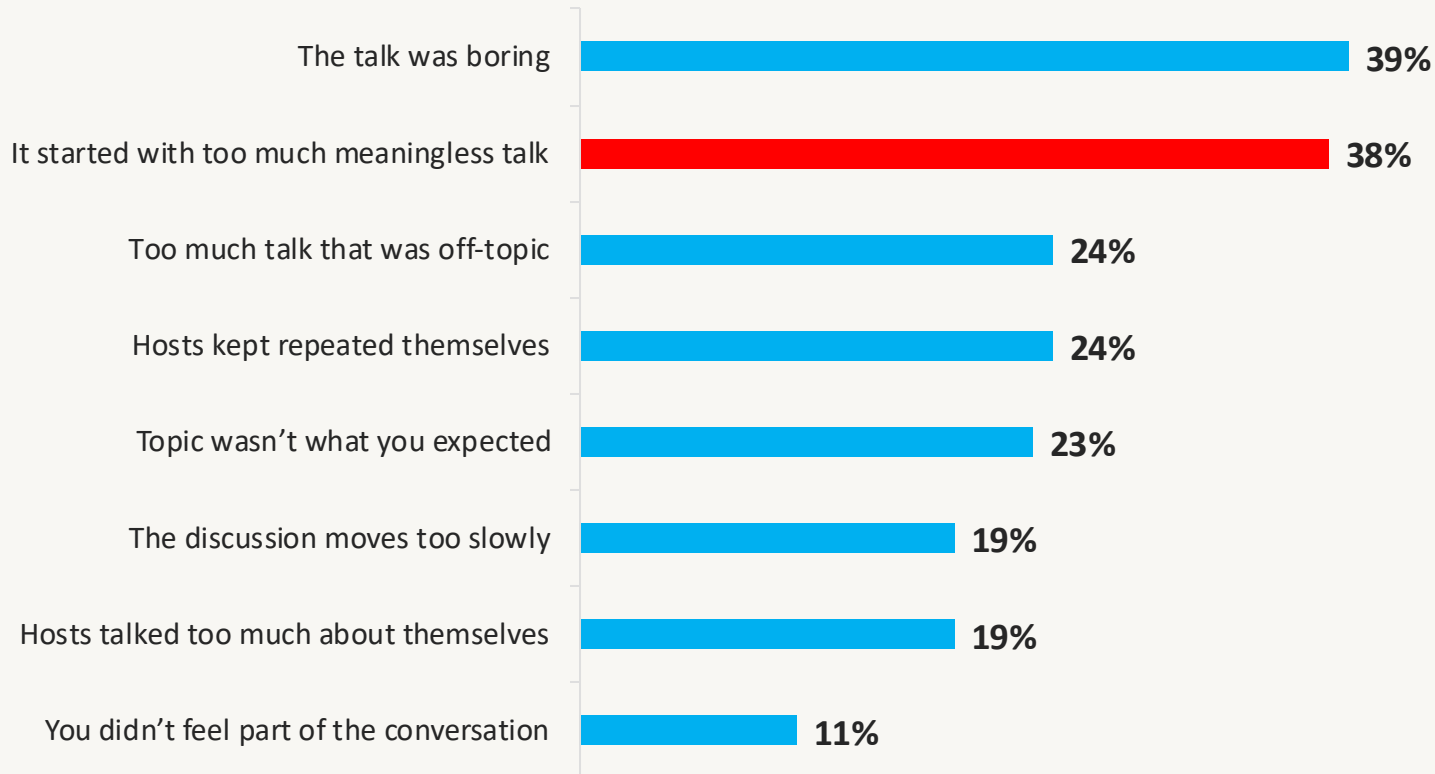
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PODCAST **FIRST IMPRESSION** TOTAL SAMPLE

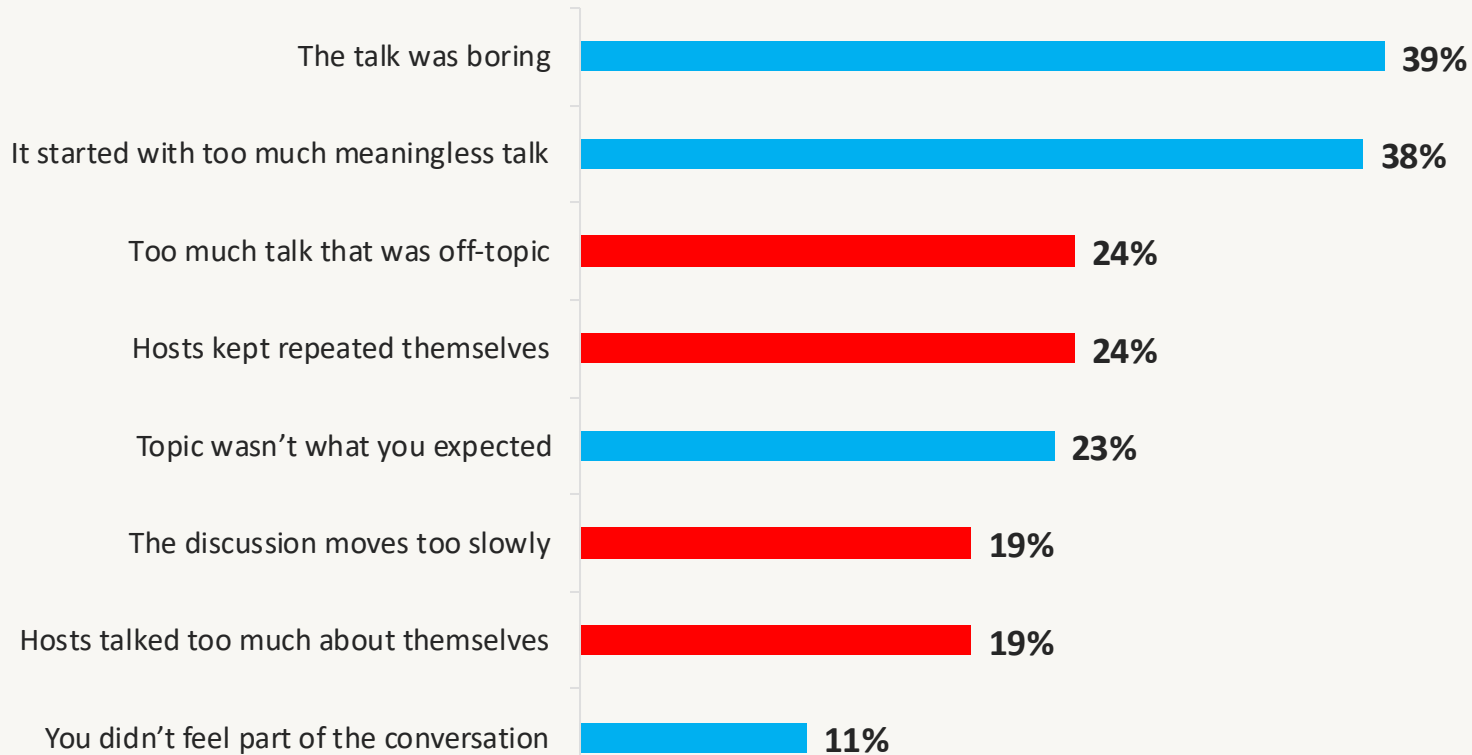
Think back to when you tried a podcast for the first time and gave up on it. Why did you decide to give up on it?





PODCAST **FIRST IMPRESSION** TOTAL SAMPLE

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A photograph of three people sitting on a couch in a casual indoor setting, likely a podcast studio. On the left, a woman with long dark hair, wearing a brown sweater and an orange scarf, is smiling and looking towards the center. In the middle, a man with a short haircut, wearing a white button-down shirt, is also smiling and looking towards the right. On the right, a man wearing a red baseball cap and a black t-shirt is looking towards the center. Each person has a professional microphone on a stand in front of them. The background shows a window with natural light and some indoor plants. A semi-transparent dark grey banner is overlaid across the middle of the image, containing the word 'SUMMARY' in large white letters and a blue bar below it with the text 'KEY POINTS / KEY ACTIONS' in white.

SUMMARY

KEY POINTS / KEY ACTIONS

SUMMARY KEY POINTS

- There is projected growth for podcasting in general AND for trial usage.
- Some consumers find it confusing to find a podcast. This group skews Female.
- The #1 reason why people use podcasts to be entertained and as an escape.
- Social Media and Friends & Family are the biggest avenues of podcast discovery, but the biggest driver of trial is a recommendation from friends or family.
- YouTube is the by far the largest discovery engine, although TikTok is strong under 35.
- Short sample clips are extremely effective for driving trial.
- The #1 reason why people haven't tried a podcast they heard about and are interested in is that they keep forgetting to check it out!
- Once a person tries a podcast, there is a good chance it becomes their favorite and a great change that they continue to listen to more episodes. If you disappoint them, there is a big chance they won't return for a second try.
- A fast start and strong product execution are critical to increasing conversion from trial to regular usage.



RECOMMENDED ACTION PLAN

1. When considering new podcasts to develop, consider the bigger mood and product categories, unless you find a very under-served need in a smaller category.
2. Consider tactics for more sharing of clips on social and via email.
3. Your marketing plan should include tactics to increase visibility and top of mind among occasional users.
4. Study product execution within your audience to improve conversion rates.
5. Design an “Engagement Funnel” to move occasional listeners/viewers to fans so you can better monetize your audience.

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