



June 2025

The Advertising Landscape

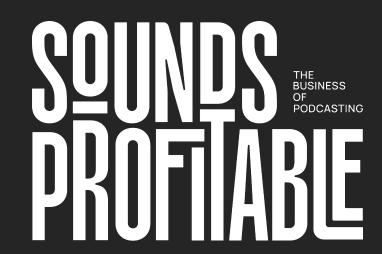
Podcasting's Place in the Ad-Supported Media Universe







June 2025



The Advertising Landscape

Part Two: Attention and Trust

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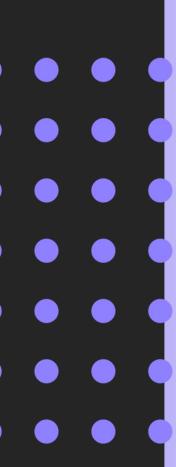














Methodology



In Jan/Feb 2025,
Sounds Profitable
partnered with Signal
Hill Insights to field an
online study of 5005
Americans ages 18+ the largest public study
of podcasting and
advertising in America



The sample was weighted to the most recent census data to be representative of the US population, using a single source, matching The Podcast Landscape (2024)



Respondents had to consume at least one type of ad-supported media to qualify. ALL media users were stipulated to be users of the ad-supported version of each media channel



Topics included overall reach of each media, attentiveness to advertising, trust/credibility of each channel, and post-exposure effectiveness





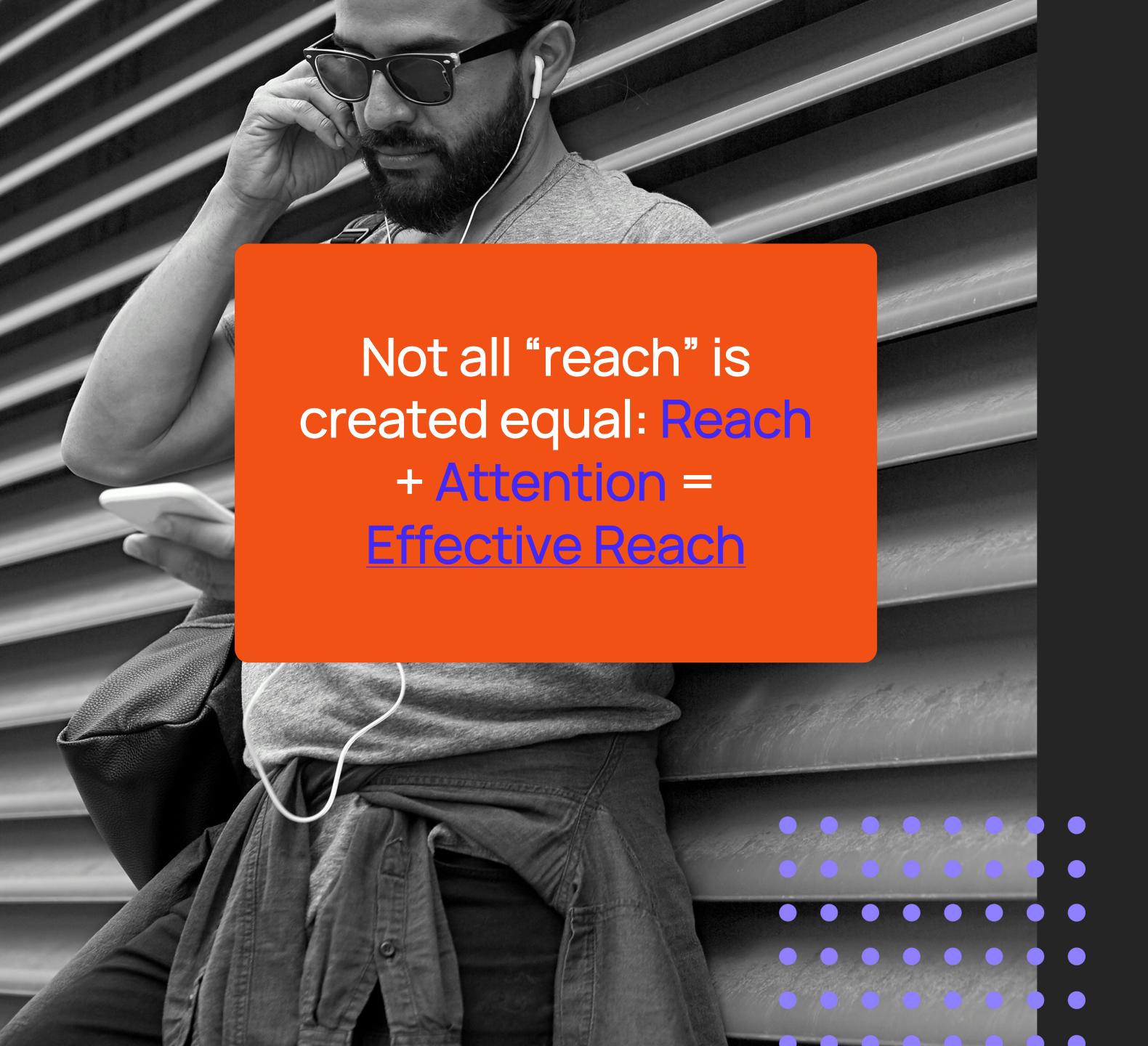










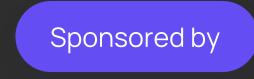




Ad-supported Podcasting reaches more than three in ten Americans 18+ every month

Monthly Usage:

Ad-Supported Media







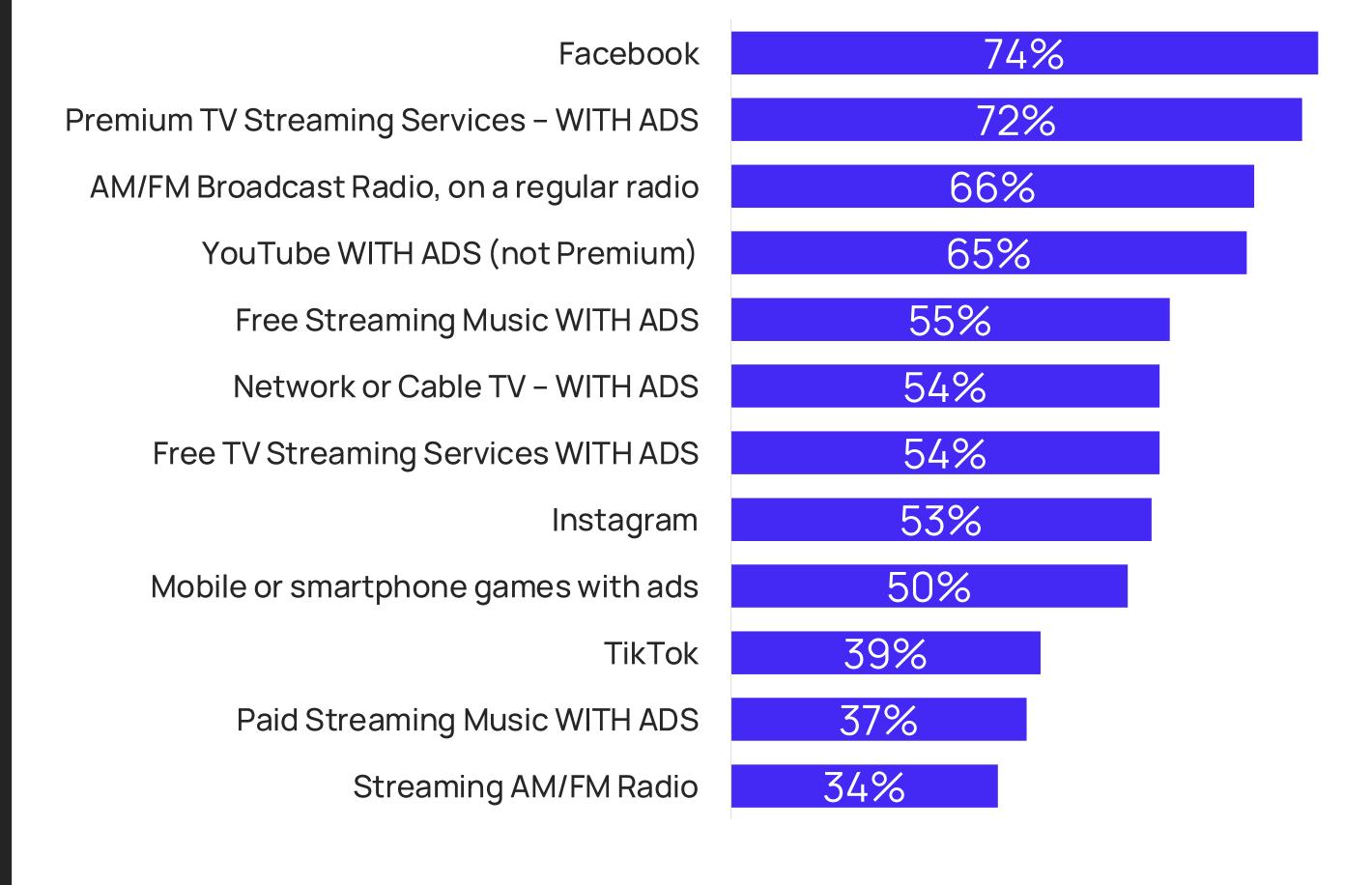








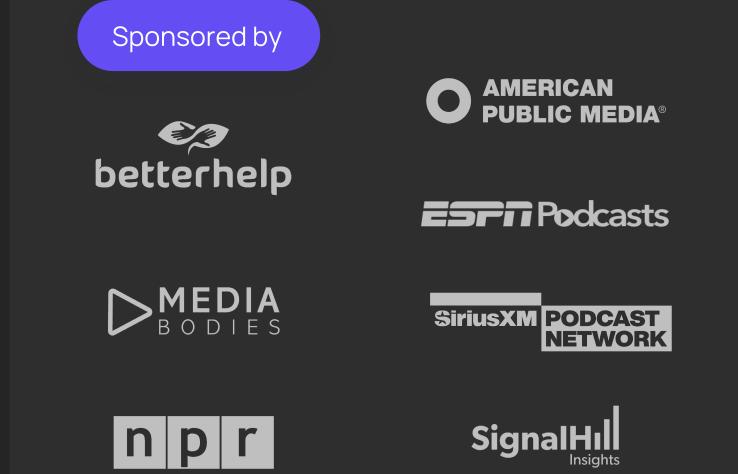




Base: Americans 18+

Monthly Usage:

Ad-Supported Media

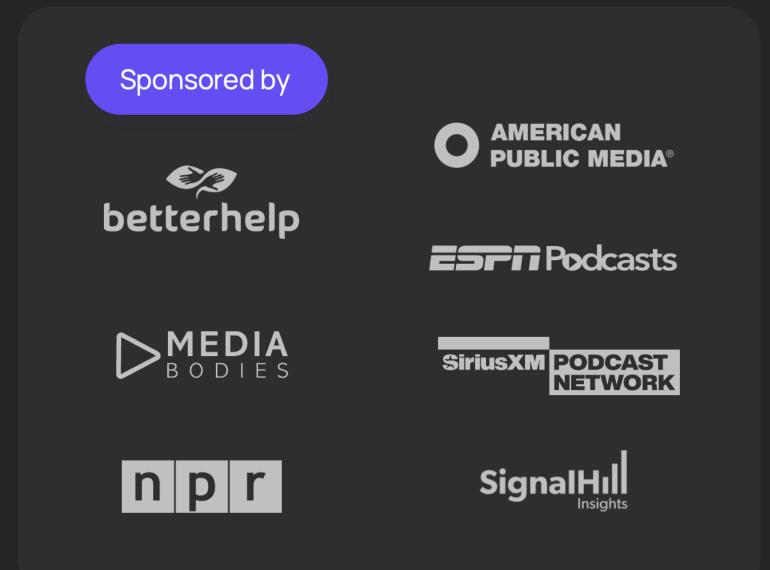


31% Podcasts WITH ADS 29% Snapchat 28% X / Twitter Console or PC videogames with ads (e.g.... 27% 25% Reddit Satellite Radio WITH ADS (e.g. talk, news) 21% 14% Discord 13% Telegram 13% Threads 13% Twitch

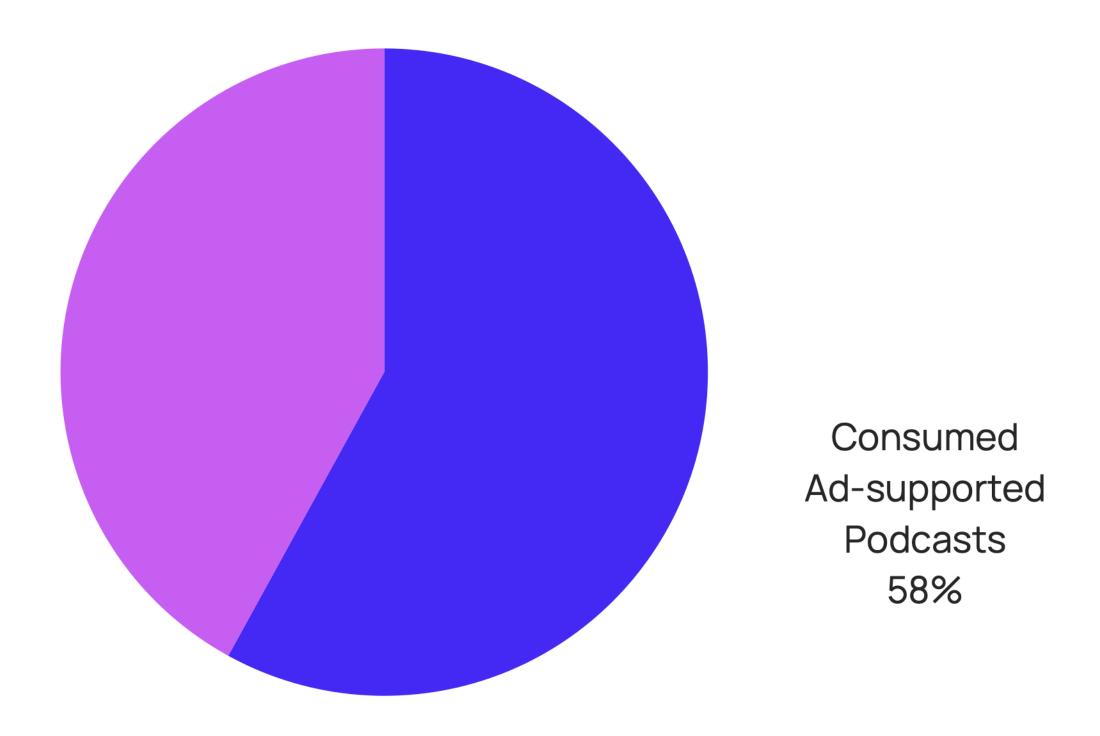
Base: Americans 18+

Usage Profile

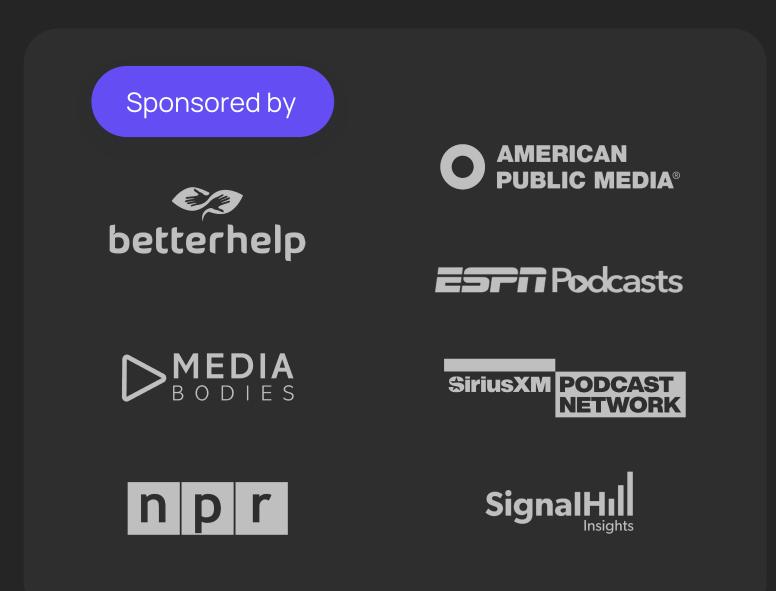
Ad-supported Podcast Consumers

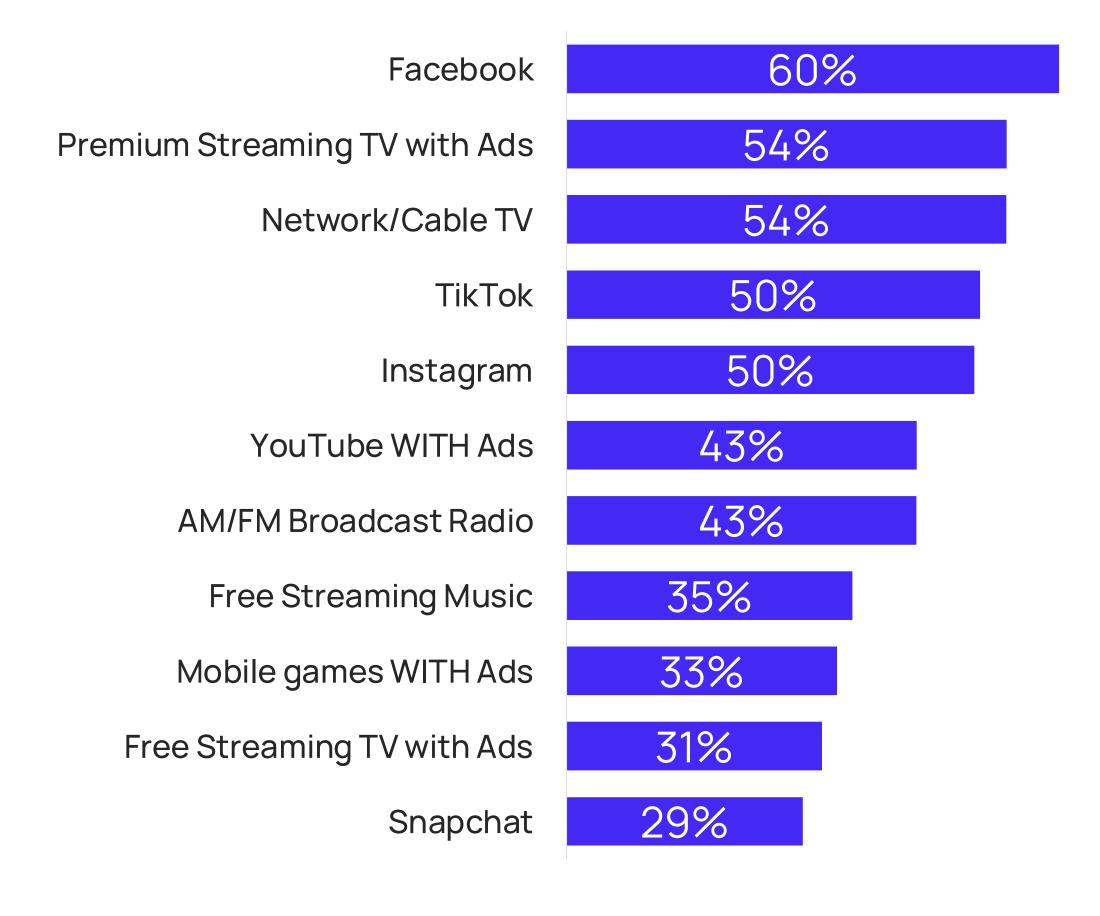


Monthly Podcast Consumers



Percentage of monthly users by media type who convert to PRIME usage (near daily AND one of top four adsupported choices)

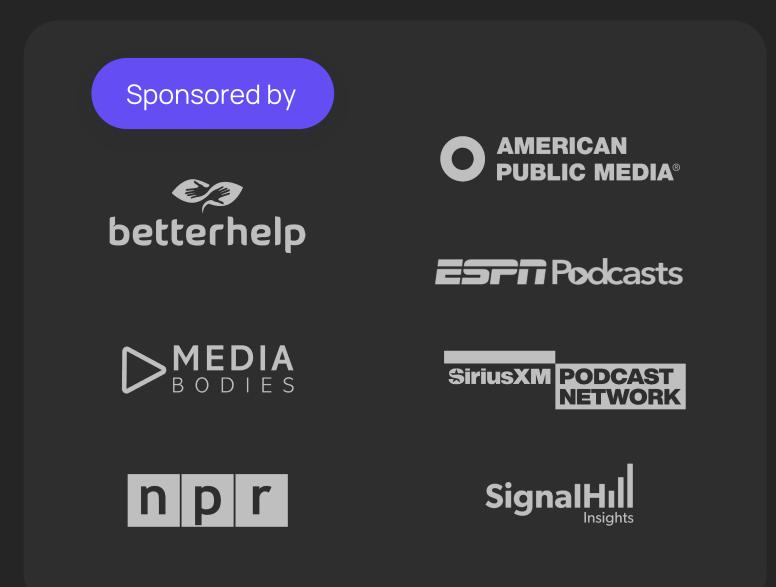




MEDIA

Base: Monthly users for each media type, 18+

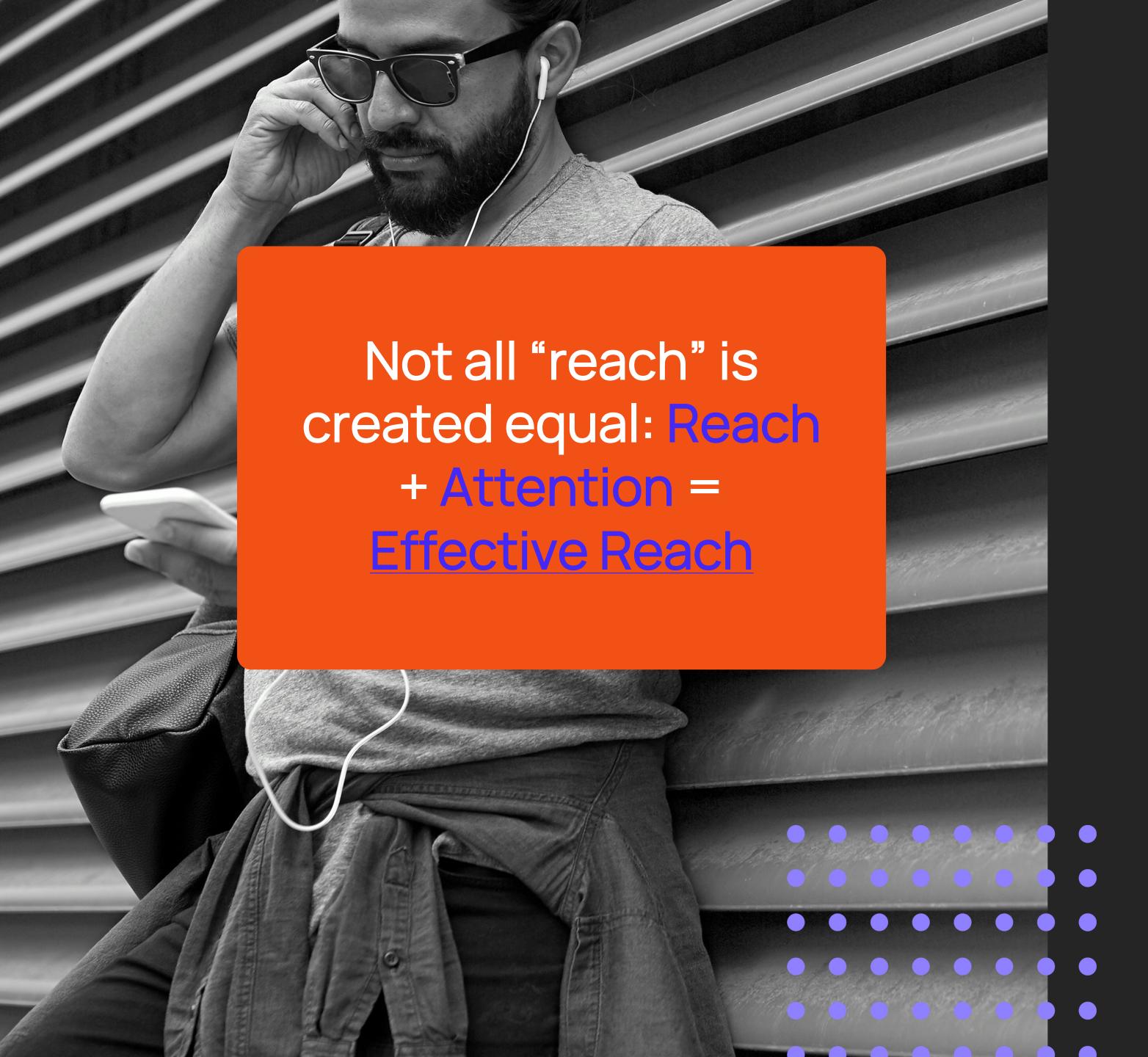
Percentage of monthly users by media type who convert to PRIME usage (near daily AND one of top four adsupported choices)



28% X/Twitter 26% Satellite Radio with Ads 26% Console games WITH Ads 24% Paid Streaming Music WITH Ads Podcasts with Ads 23% 19% Streaming AM/FM Telegram 19% 18% Discord 18% Reddit 12% Twitch 10% Threads

>MEDIA

Base: Monthly users for each media type, 18+





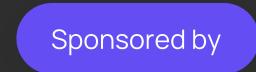
Ad-supported Podcasting reaches more than three in ten Americans 18+ every month



However, when attention is factored in, the *effective* reach of podcasting punches well above its weight

Have you seen or heard an advertisement on any of these media in the past week or seven days?

PRIME Users

















PRIME Users

Podcasts WITH ADS	86%
Network or Cable TV – WITH ADS	82%
AM/FM Broadcast Radio, on a regular radio	81%
Free TV Streaming Services WITH ADS	79%
TikTok	78%
Premium TV Streaming Services – WITH ADS	77%
Twitch	77%
Streaming AM/FM Radio	76%
YouTube WITH ADS (not Premium)	75%
Mobile or smartphone games with ads	73%
Instagram	71%
Free Streaming Music WITH ADS	71%
X / Twitter	68%
Facebook	67%
Reddit	63%
Paid Streaming Music WITH ADS	59%
Console or PC videogames with ads	59%
Snapchat	56%
Satellite Radio WITH ADS (e.g. talk, news)	56%
Telegram	56%
Threads	54%
Discord	34%

MEDIA

Have you seen or heard an advertisement on any of these media in the past week or seven days?











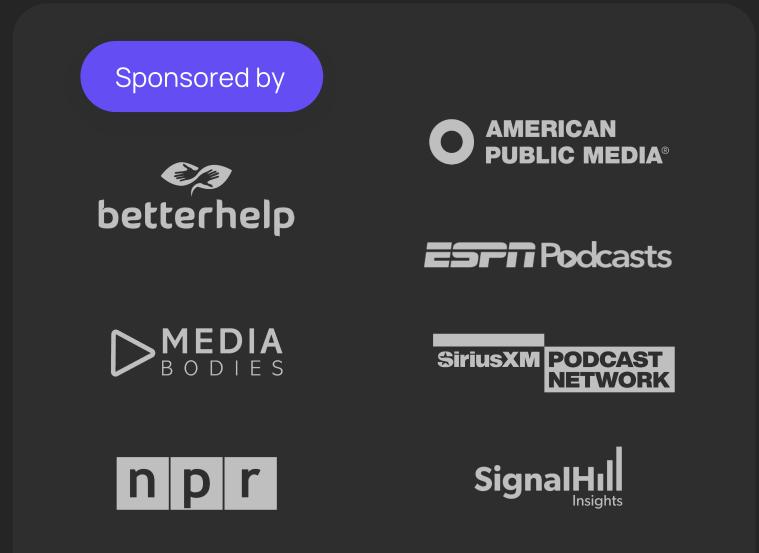




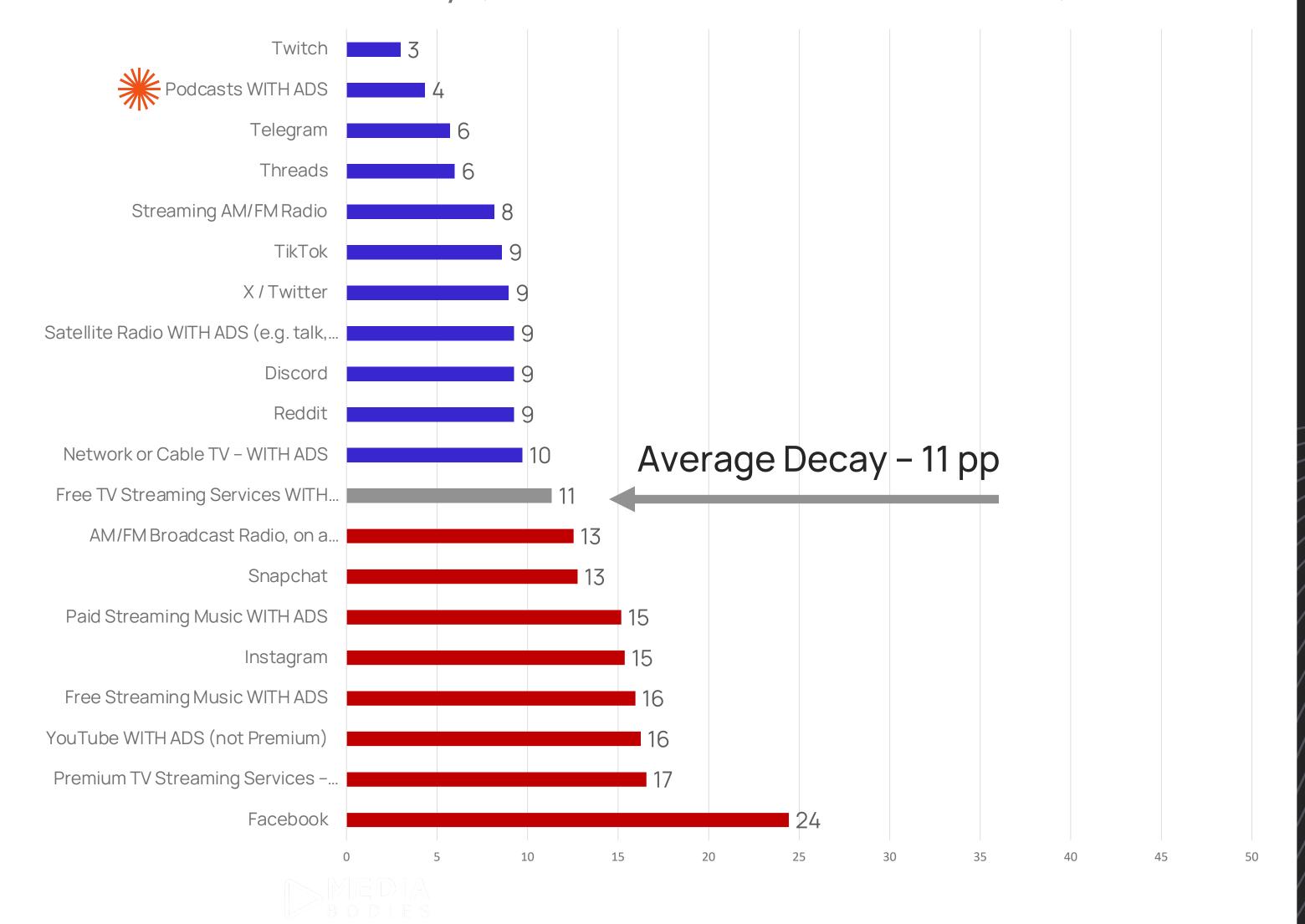


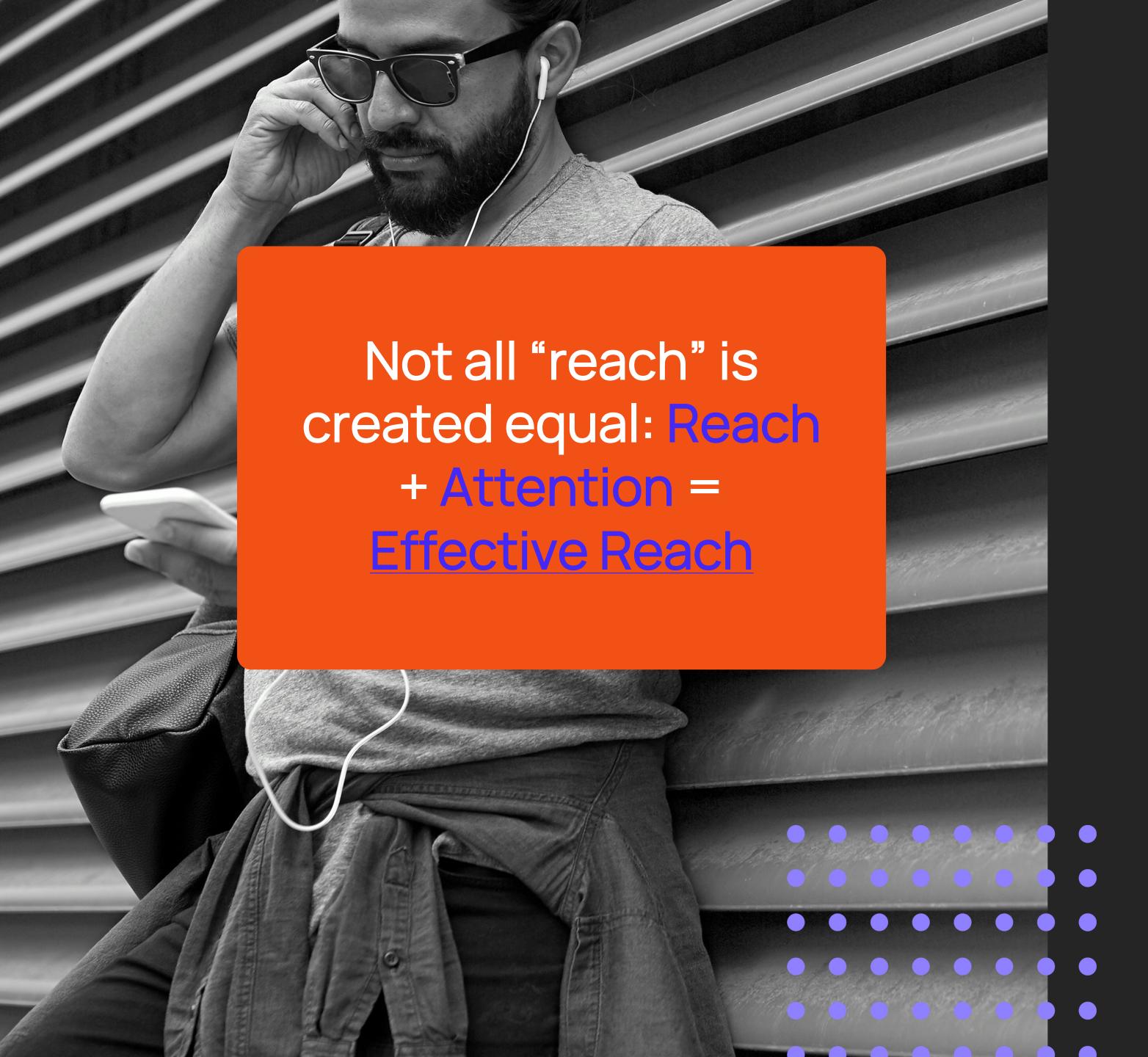
	Monthly Reach	% Ad Recall (PRIME Users)	"Effective" Ad Reach (Reach x Recall)
Premium TV Streaming Services – WITH ADS	72%	77%	55%
AM/FM Broadcast Radio, on a regular radio	66%	81%	53%
Facebook	74%	67%	50%
YouTube WITH ADS (not Premium)	65%	75%	49%
Network or Cable TV – WITH ADS	54%	82%	44%
Free TV Streaming Services WITH ADS	54%	79%	43%
Free Streaming Music WITH ADS	55%	71%	39%
Instagram	53%	71%	38%
TikTok	39%	78%	30%
Podcasts WITH ADS	31%	86%	27%
Streaming AM/FM Radio	34%	76%	26%
Paid Streaming Music WITH ADS	37%	59%	22%
X / Twitter	28%	68%	19%
Snapchat	29%	56%	16%
Reddit	25%	63%	16%
Satellite Radio WITH ADS (e.g. talk, news)	21%	56%	12%
Twitch	13%	77%	10%
Telegram	13%	56%	7%
Threads	13%	54%	7%
Discord	14%	34%	5%

Have you seen or heard an advertisement on any of these media in the past week or seven days?



Reach Decay (Effective Reach - Actual Reach)







Ad-supported Podcasting reaches more than three in ten Americans 18+ every month



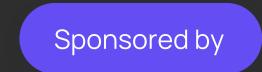
However, when attention is factored in, the effective reach of podcasting punches well above its weight



Podcasting's real superpower? Its unique ability to attract <u>equal</u> attention across gender and demographics

Have you seen or heard an advertisement on any of these media in the past week or seven days?

PRIME Users















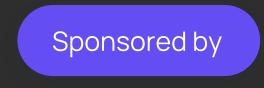


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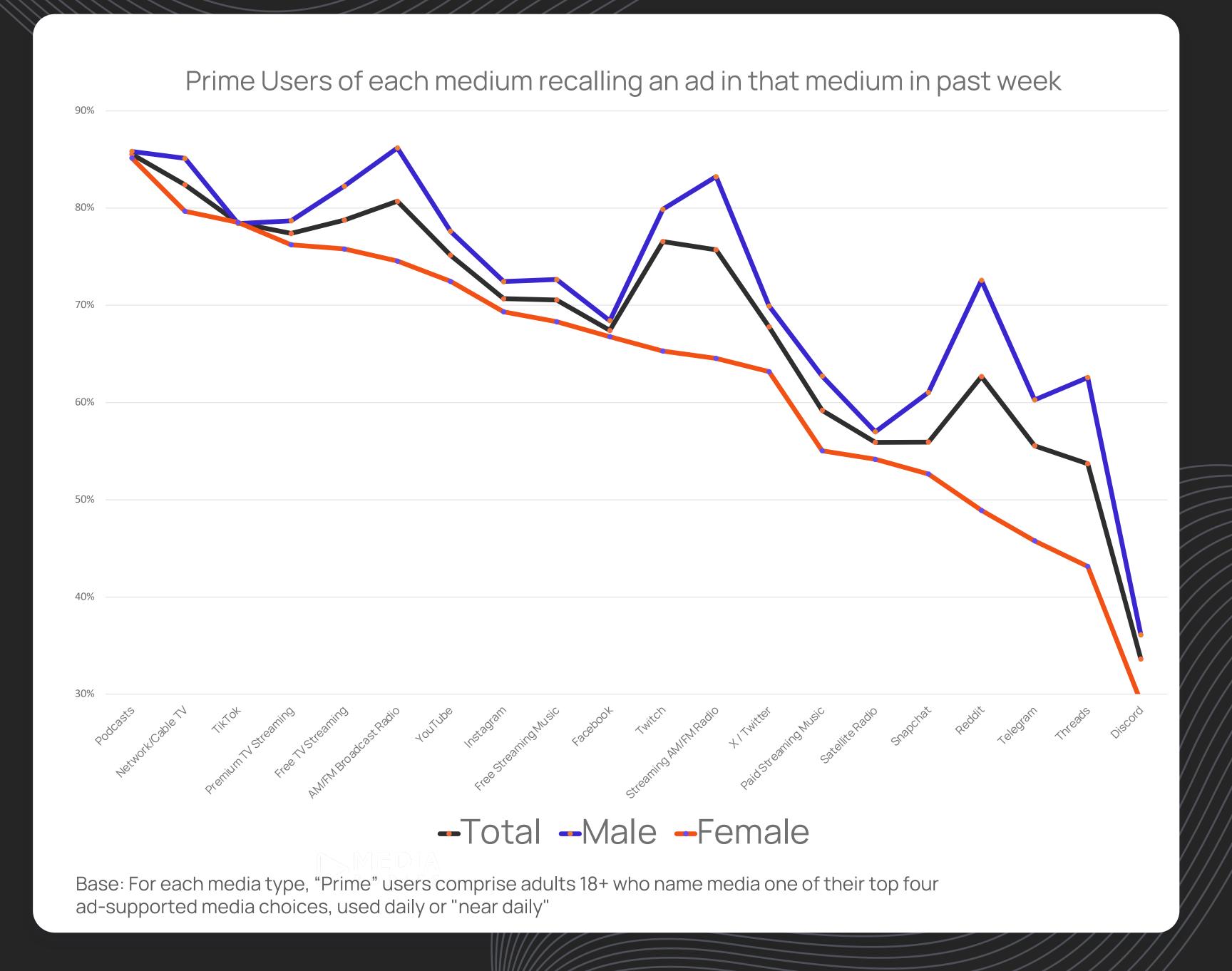




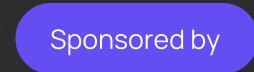








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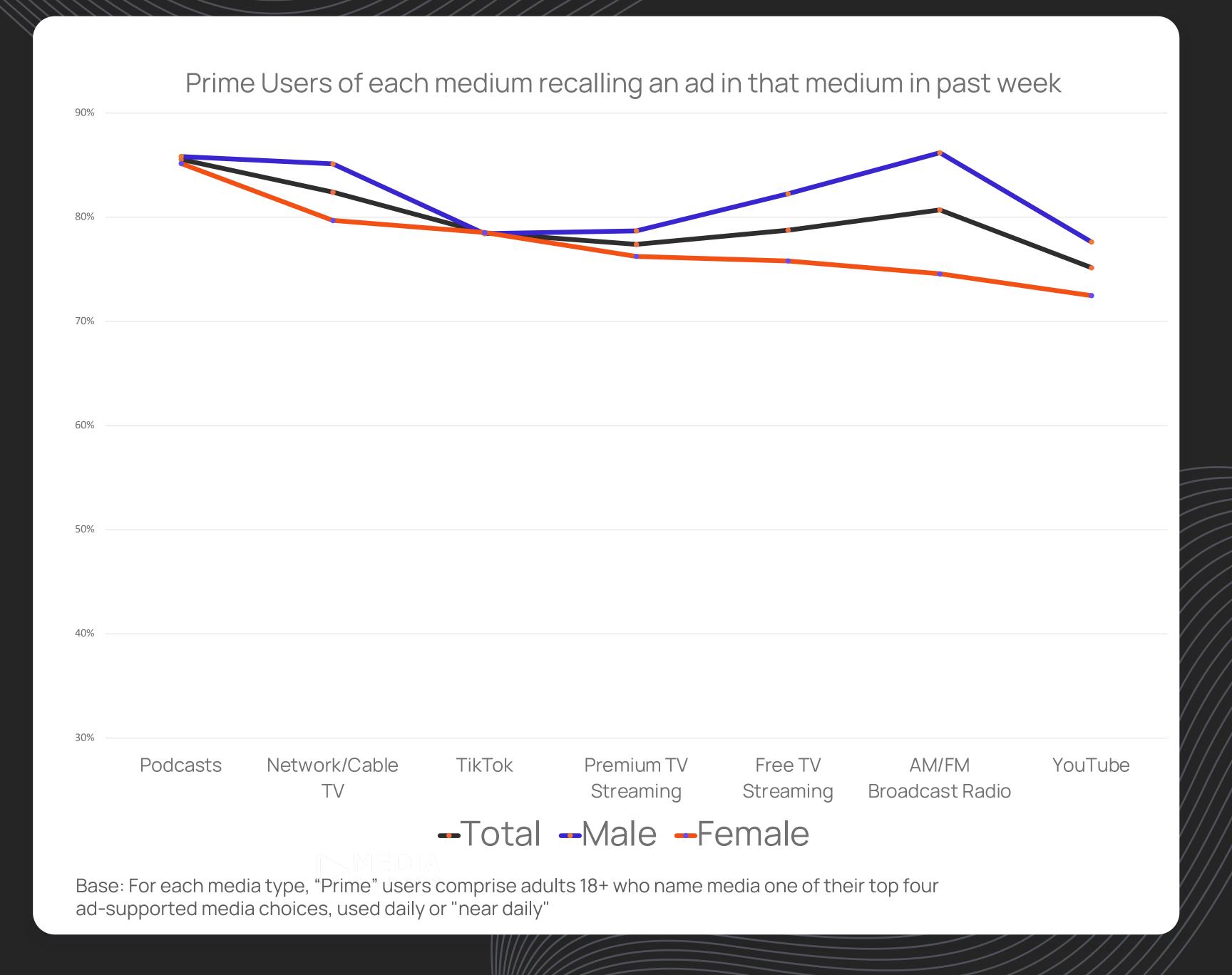




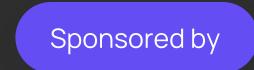








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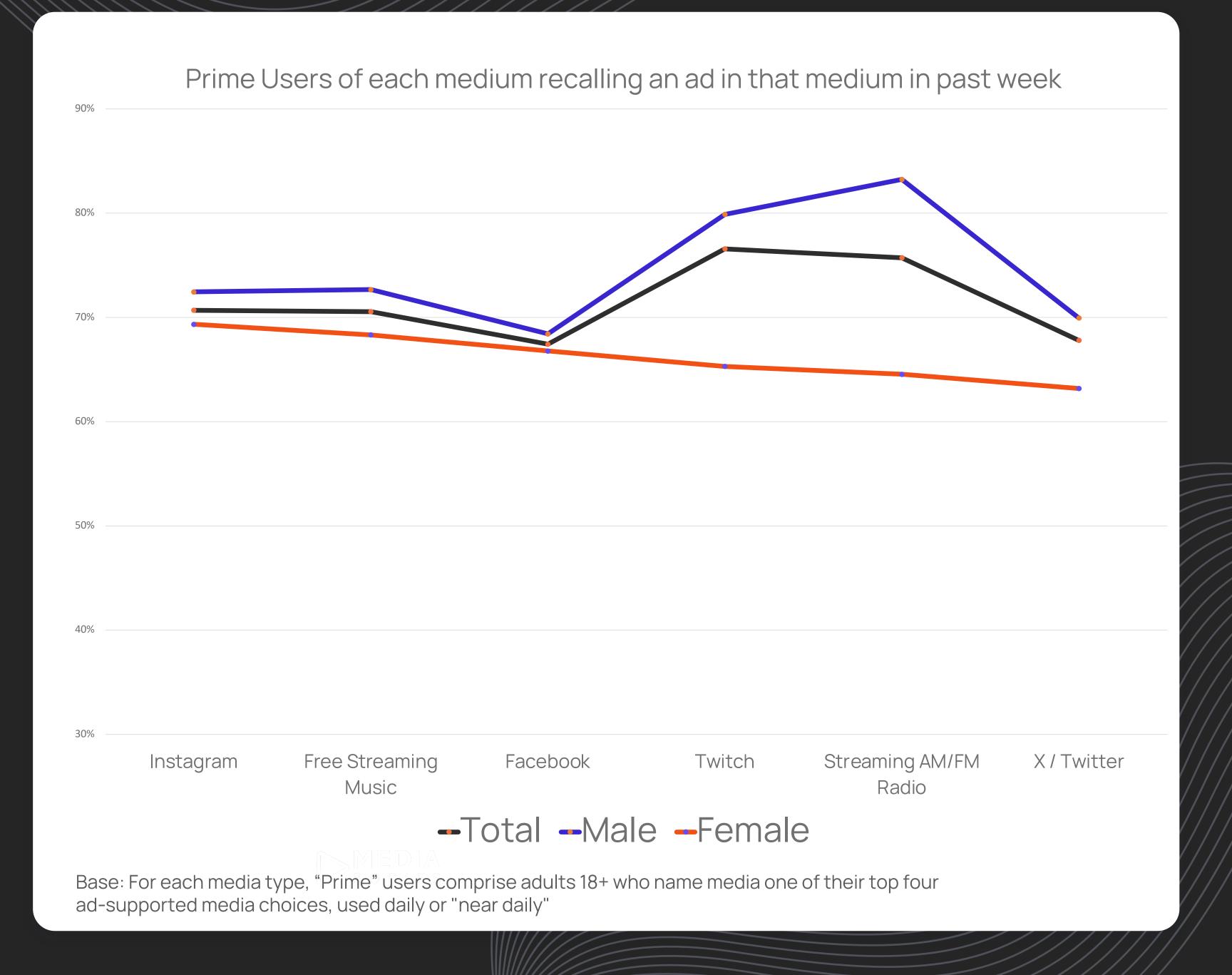




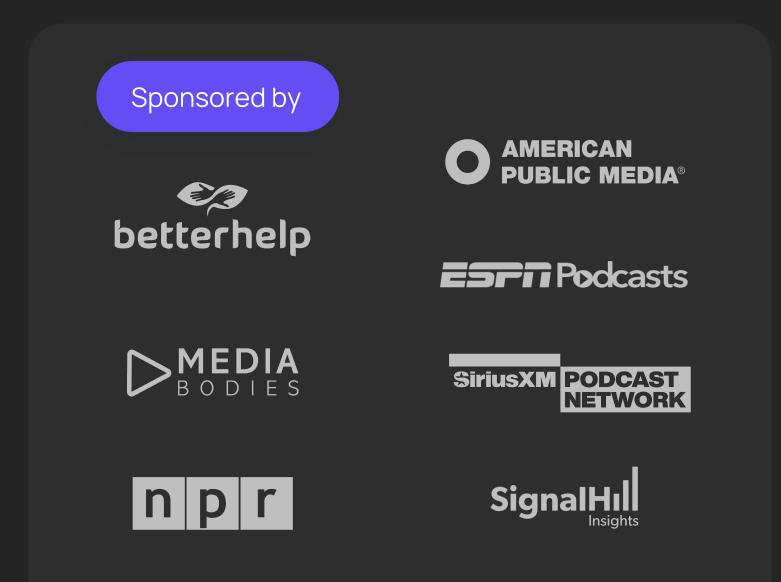


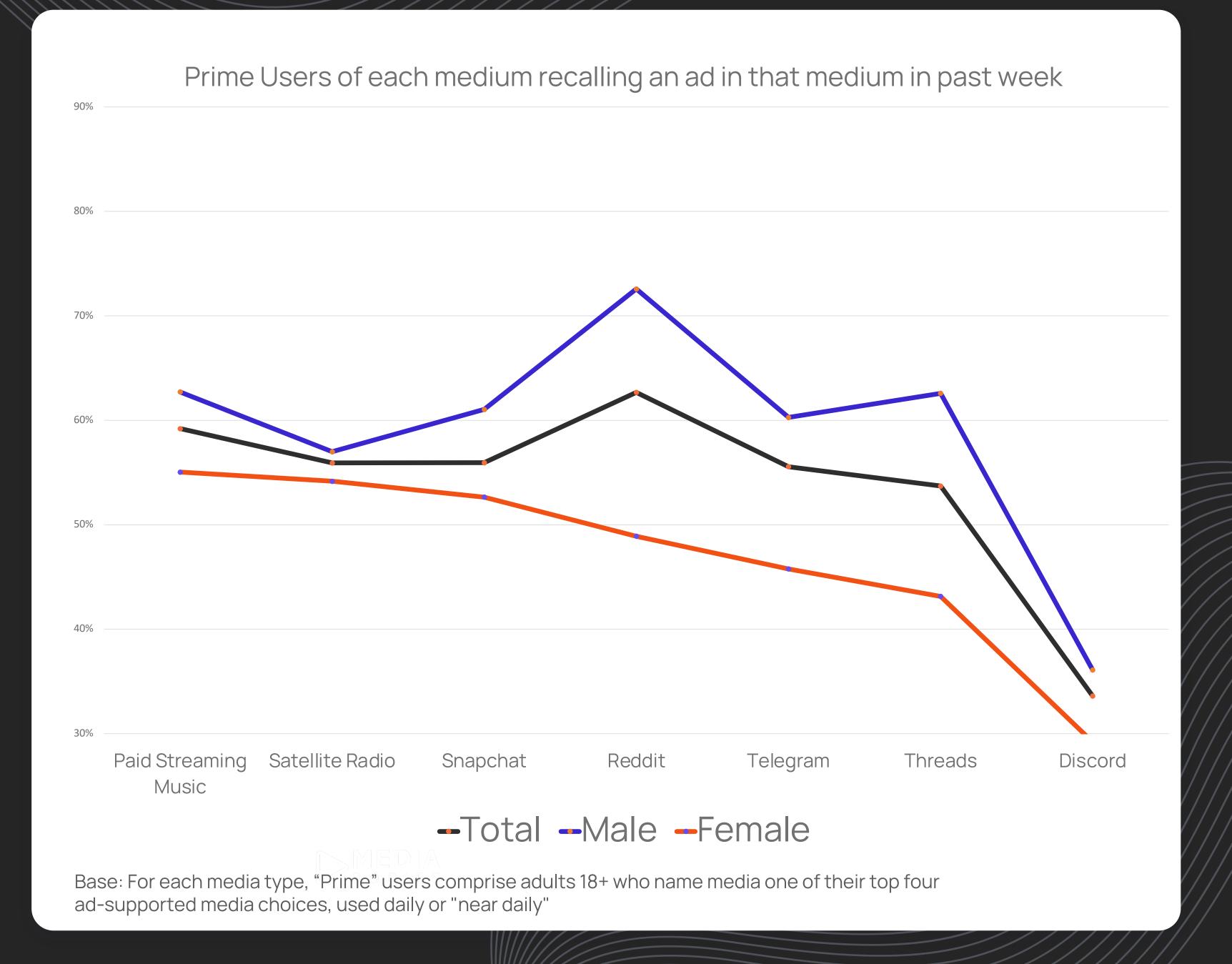






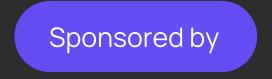
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Have you seen or heard an advertisement on any of these media in the past week or seven days?

PRIME Users







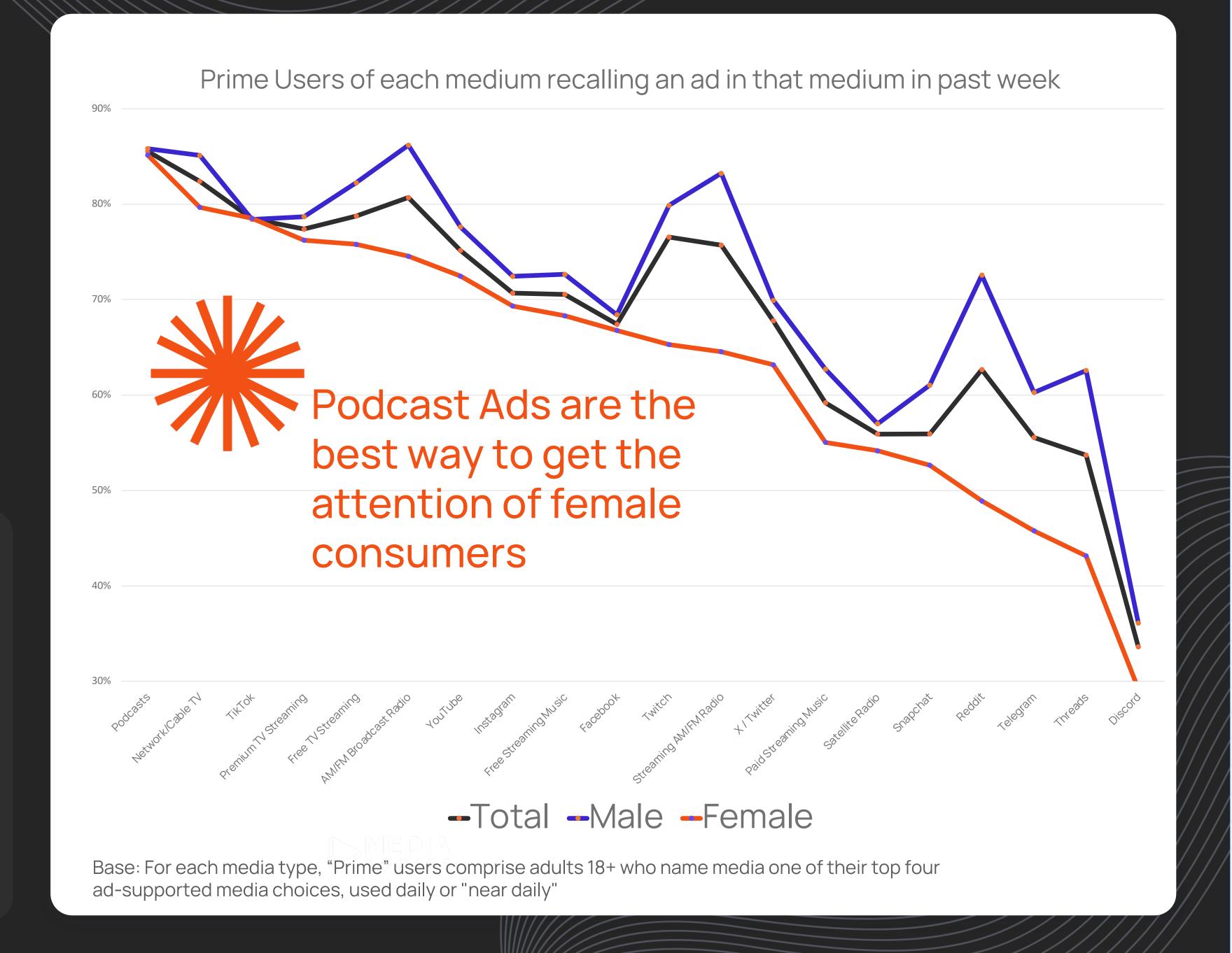
ESFII Podcasts





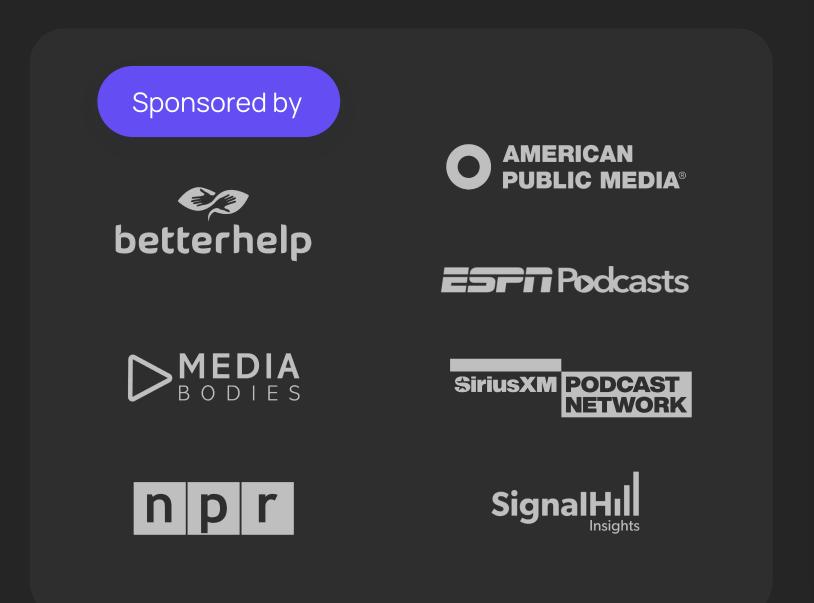


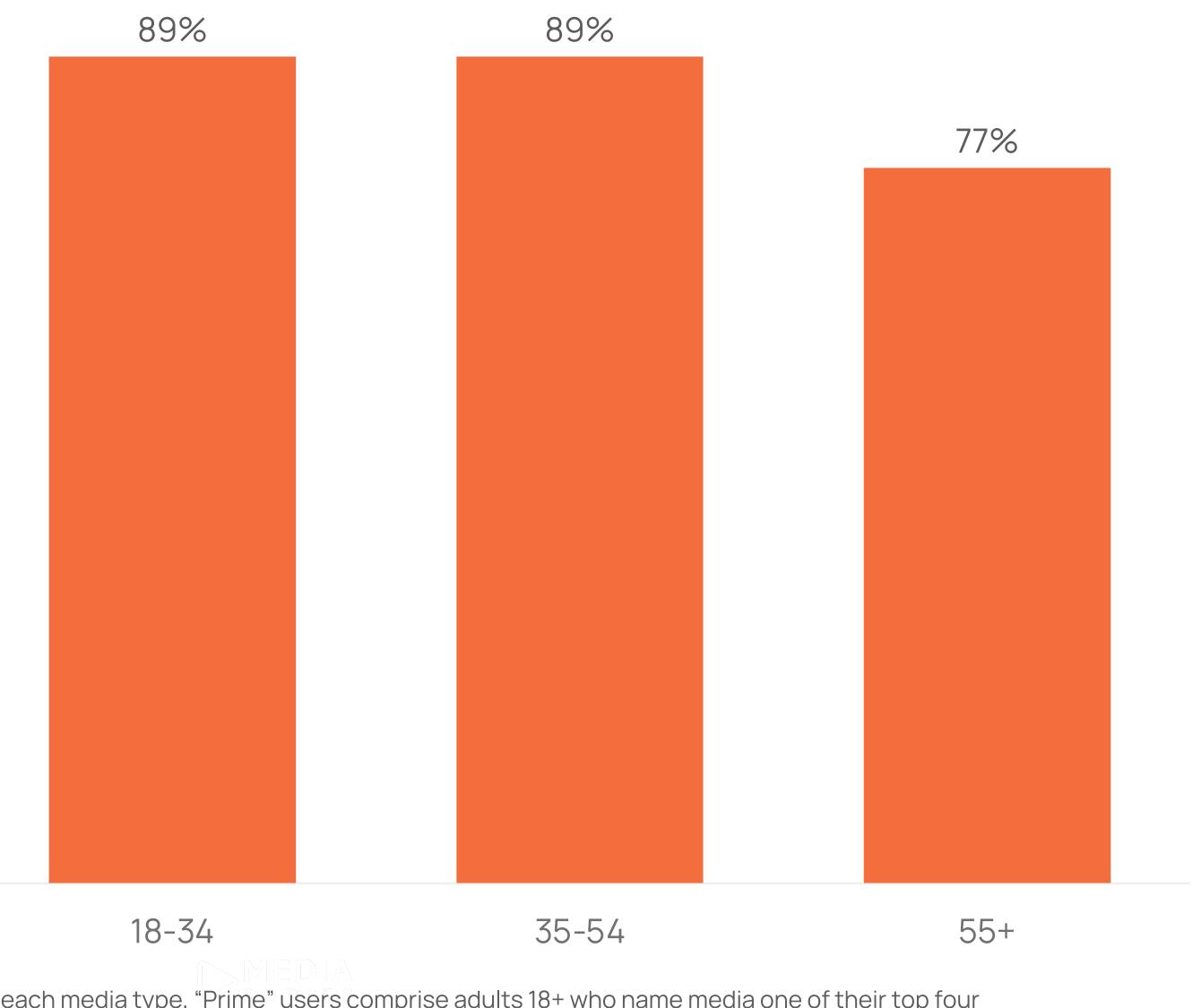




Have you seen or heard an advertisement on a podcast in the past week or seven days?

PRIME Users





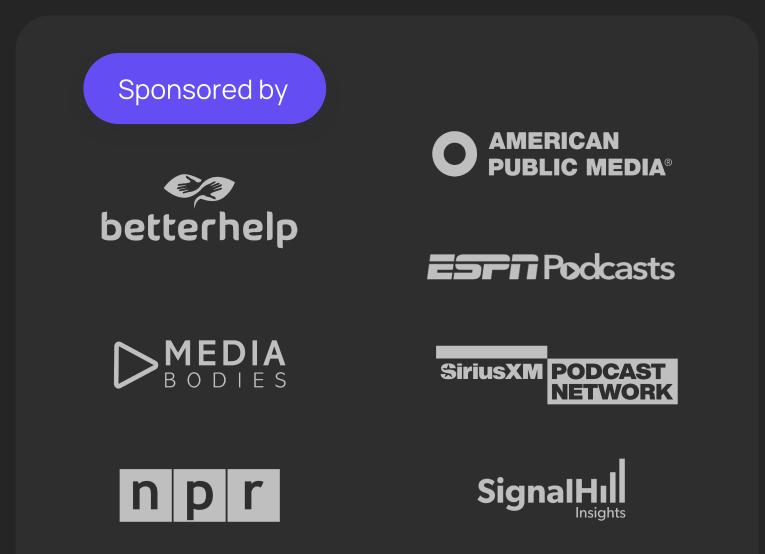




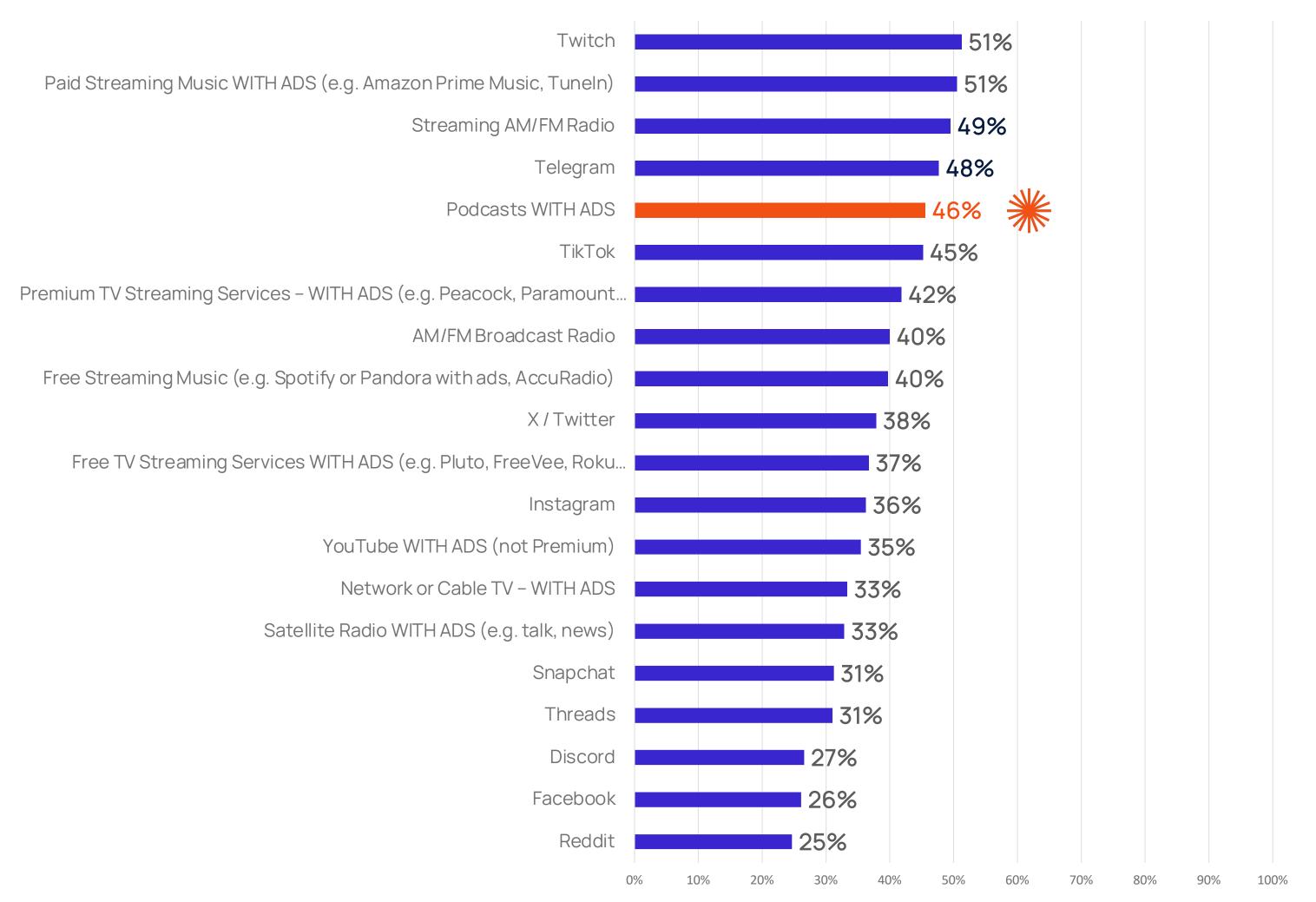
Audiences trust podcast content innately – they self-select for the content they trust and believe the most

"I trust the content moderation and/or quality control on [MEDIA]

% Agree – PRIME Users



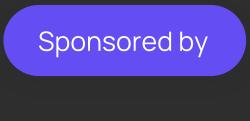
Audiences Trust Podcasting Content



- MEDIA

"The content on [MEDIA] is generally factual and accurate"

% Agree – PRIME Users









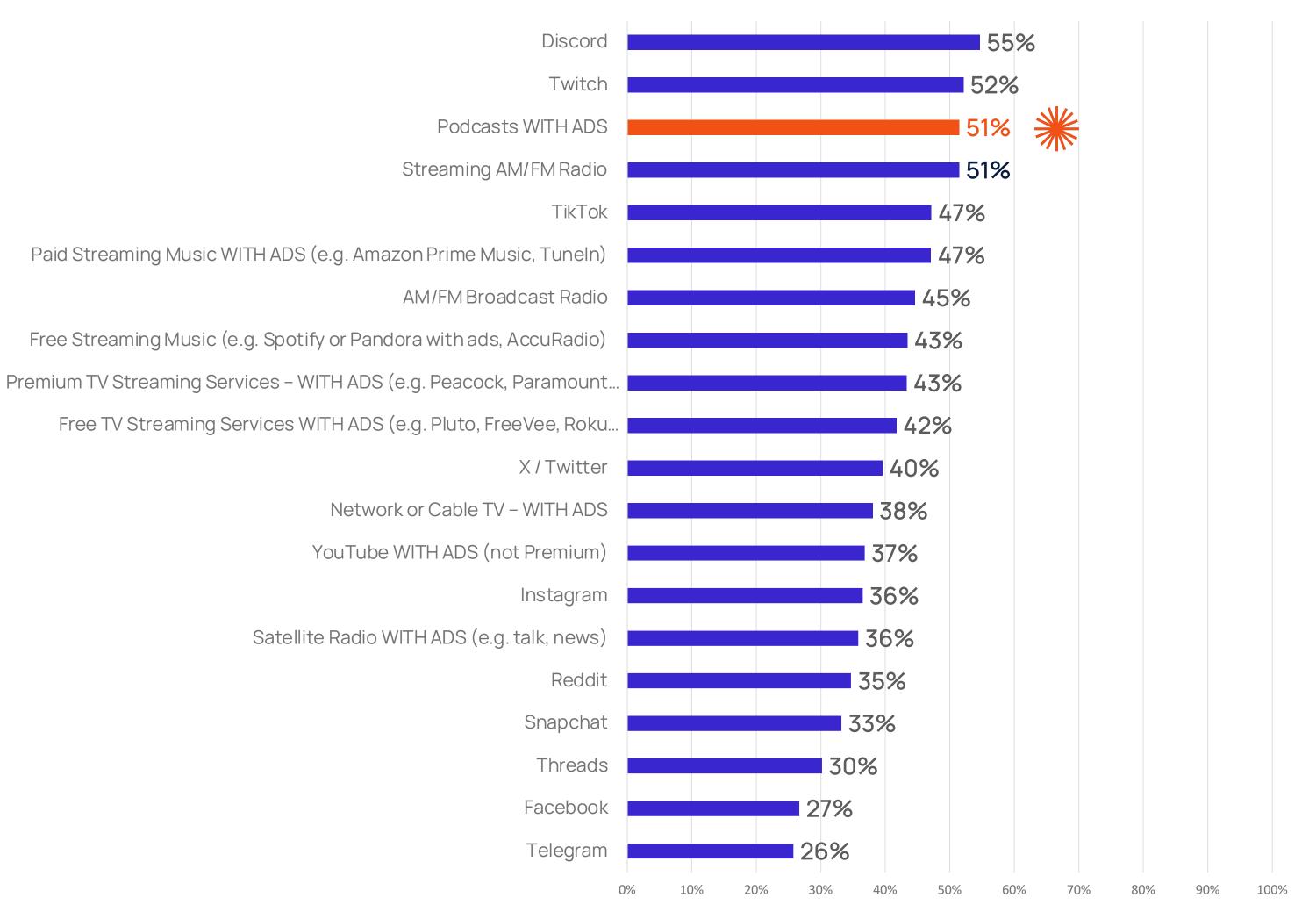








Audiences Trust Podcasting Content



MEDIA





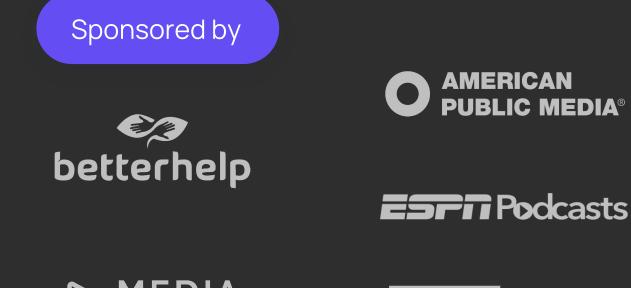
Audiences trust podcast content innately – they self-select for the content they trust and believe the most



That trust extends to the believability of the advertising messages in podcasting, while social media suffers from a lack of credibility

"[MEDIA] effectively prevents misleading or false advertising"

% Agree-PRIME Users



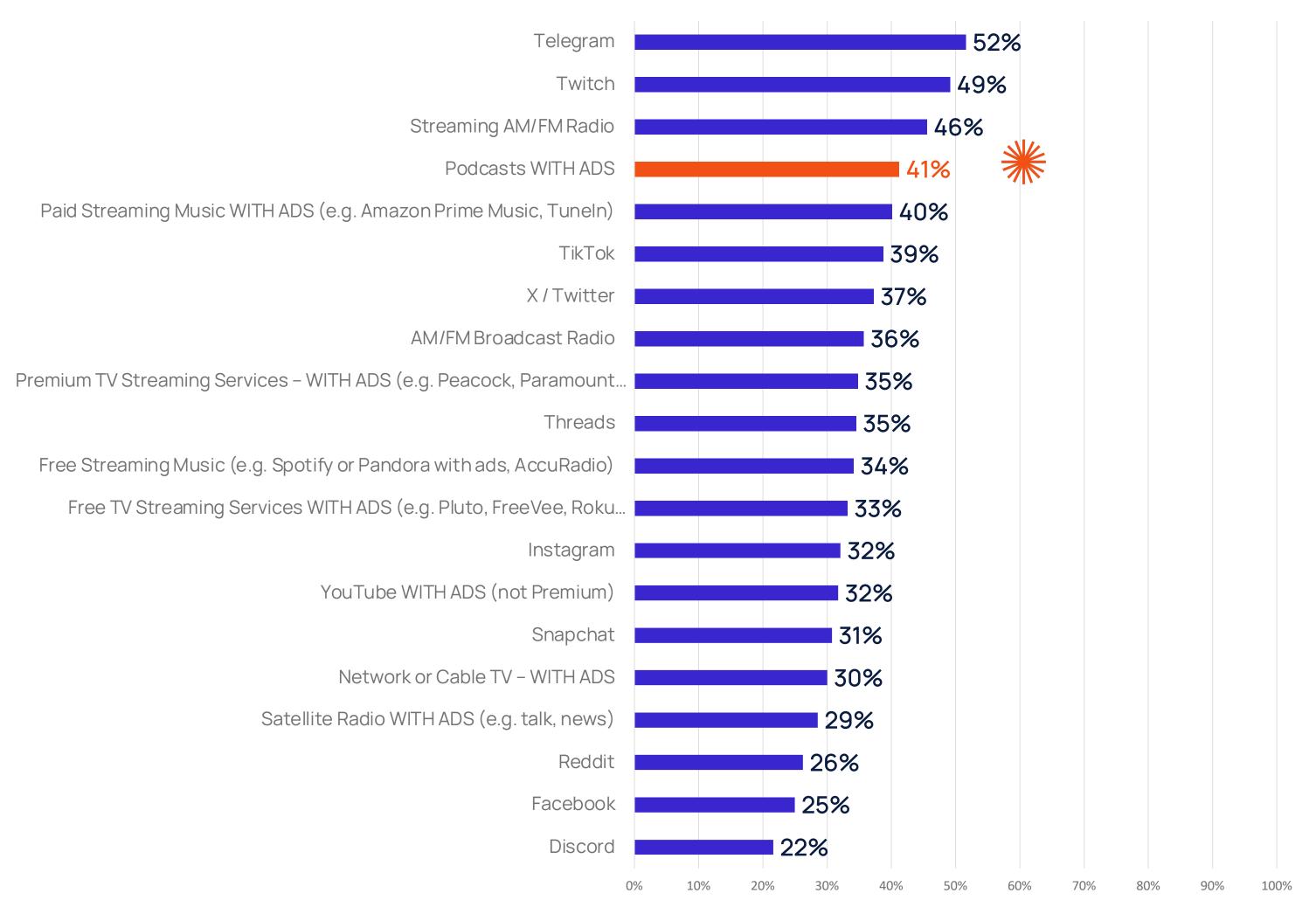






SiriusXM PODCAST

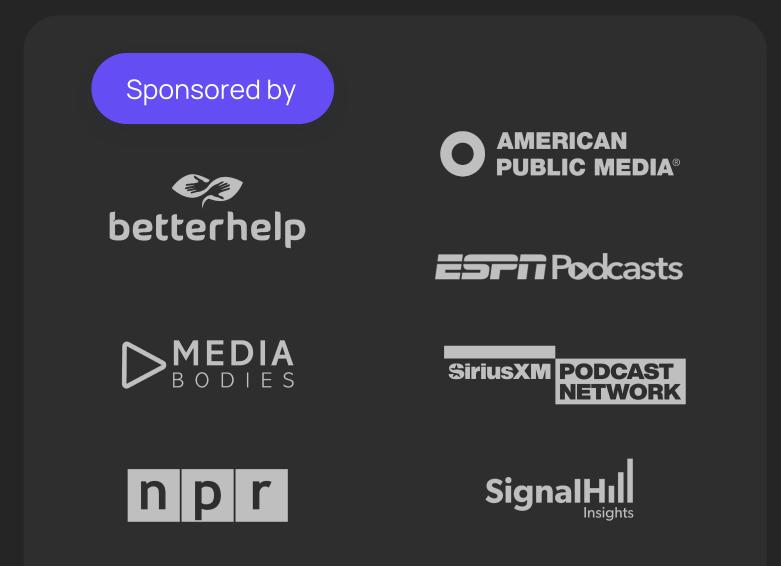
Podcasting Perceived as Safe from False Claims



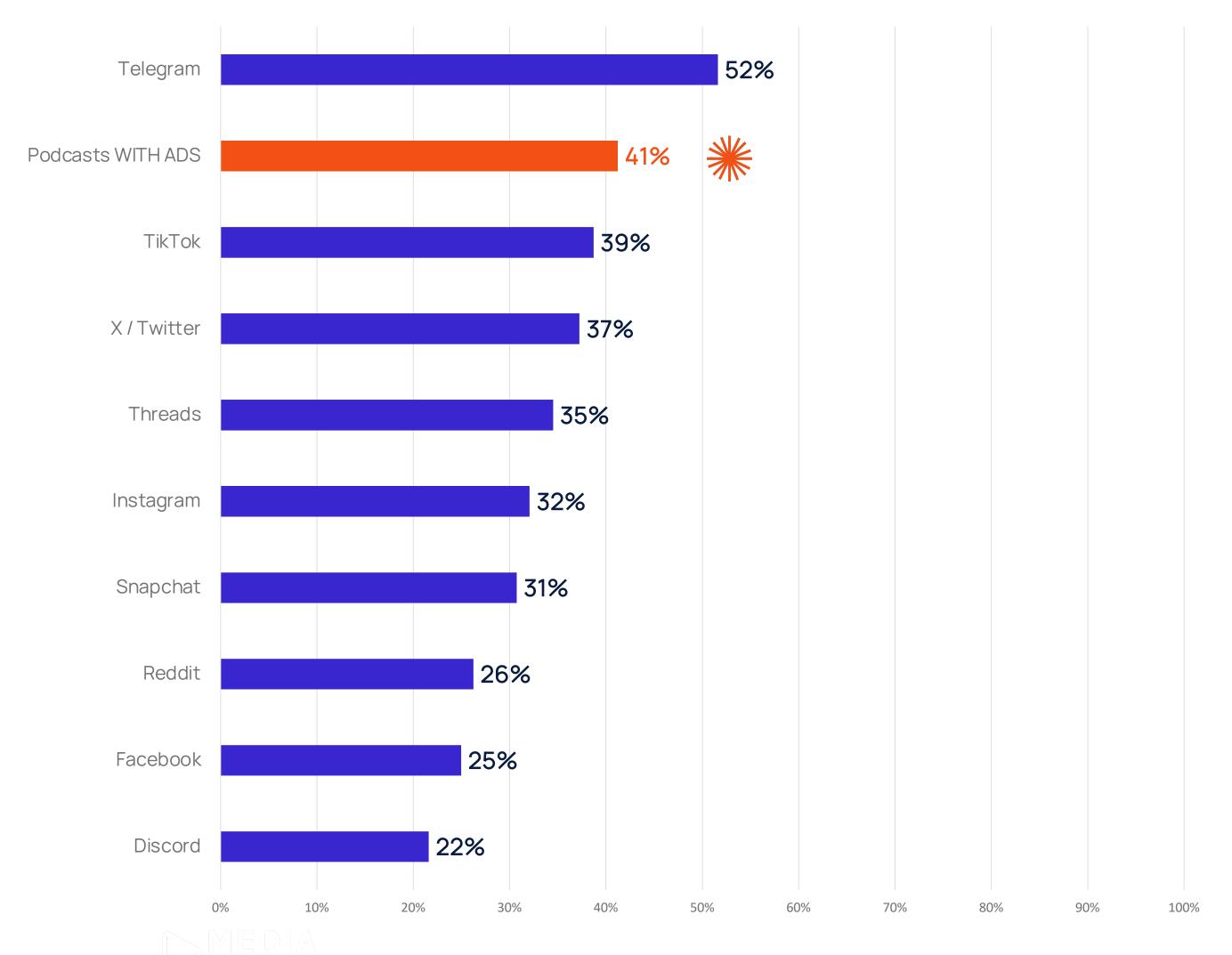
MEDIA

"[MEDIA] effectively prevents misleading or false advertising"

% Agree-PRIME Users



Podcasting Significantly More Trustworthy than Social



"What percentage of the advertising claims made on [MEDIA] do you believe to be true?"

% of true claims – PRIME Users









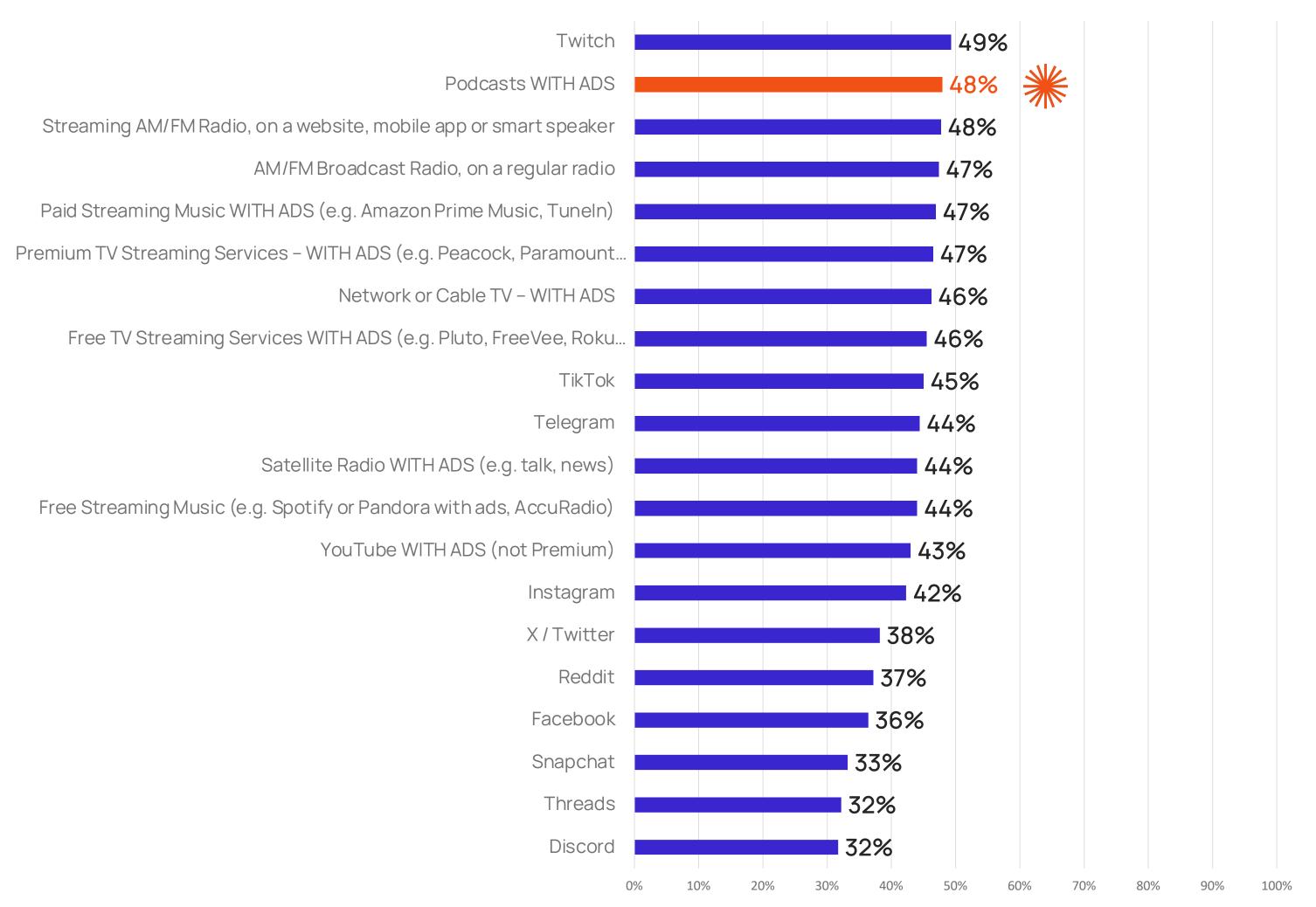








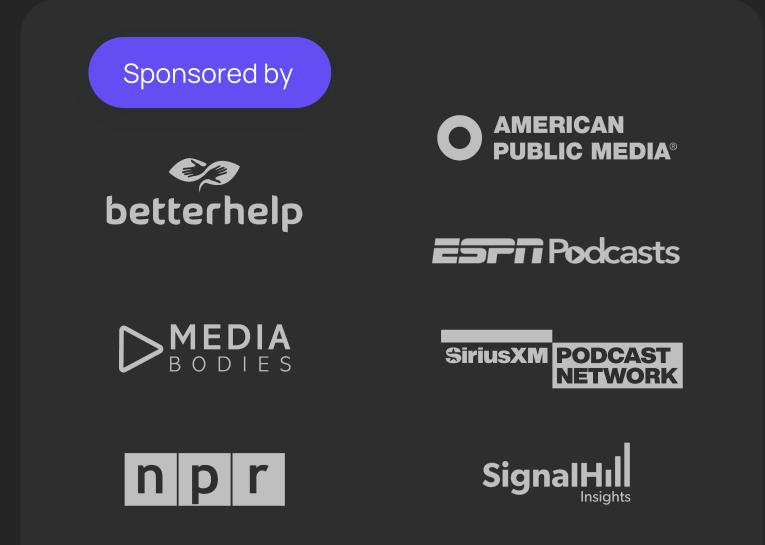
Podcast Advertising Claims are Trusted



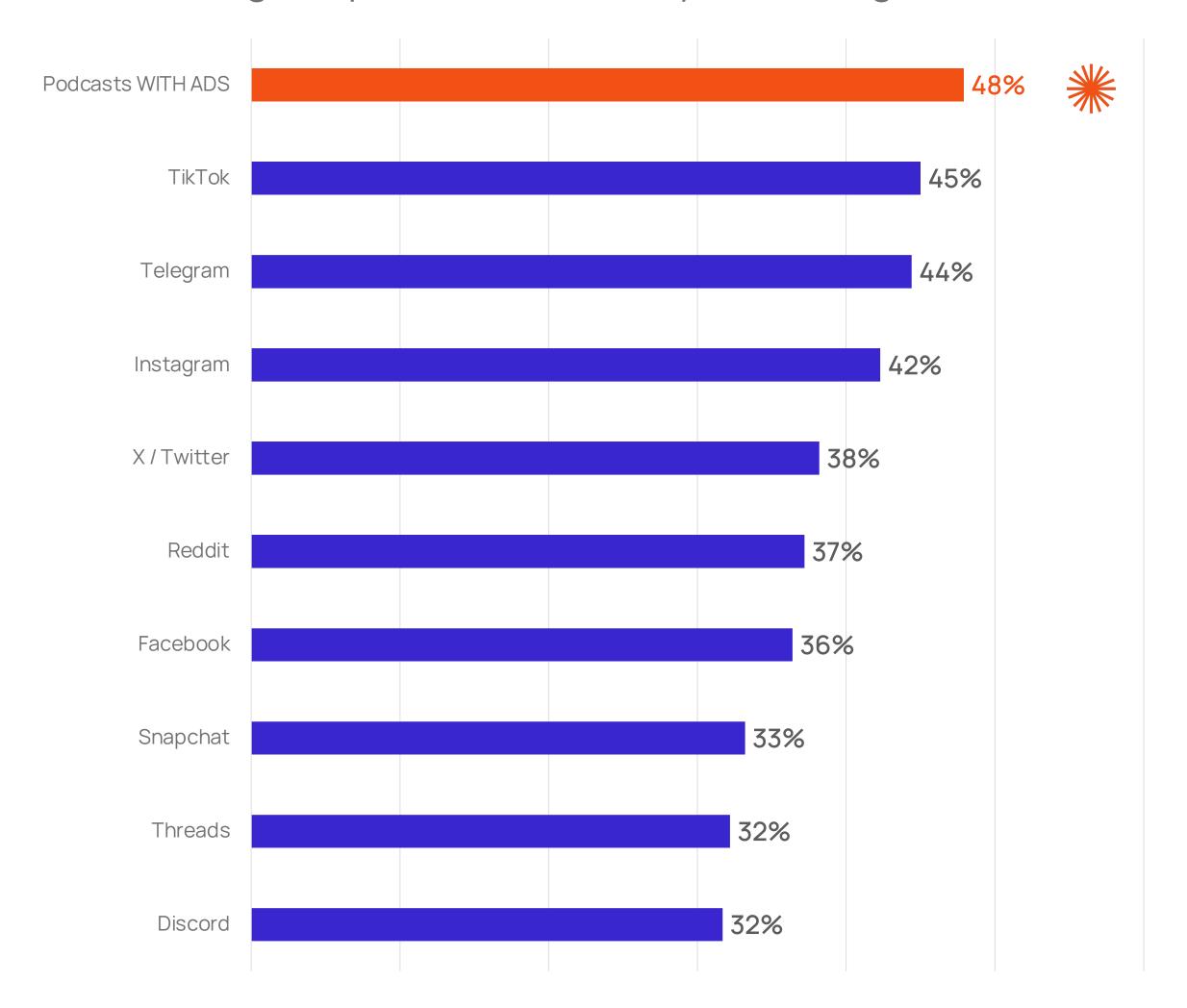
MED]A

"What percentage of the advertising claims made on [MEDIA] do you believe to be true?"

% of true claims – PRIME Users



Podcasting Outperforms Social by an Average of 10 Points



MEDIA





Audiences trust podcast content innately – they self-select for the content they trust and believe the most



That trust extends to the believability of the advertising messages in podcasting, while social media suffers from a lack of credibility



The key to podcasting's advantage is authenticity

"The advertising on [MEDIA] feels authentic and natural"

% Agree – PRIME Users









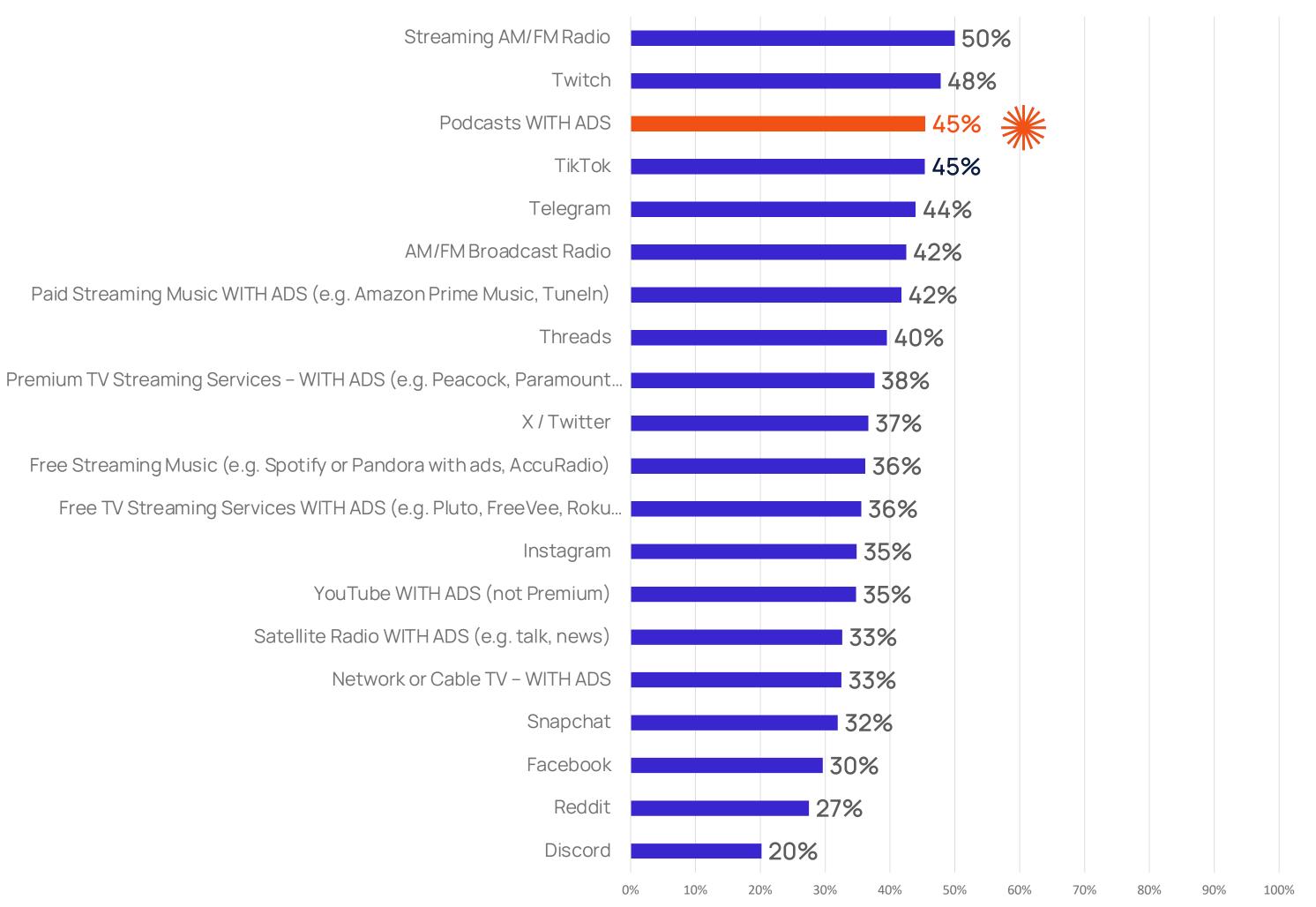








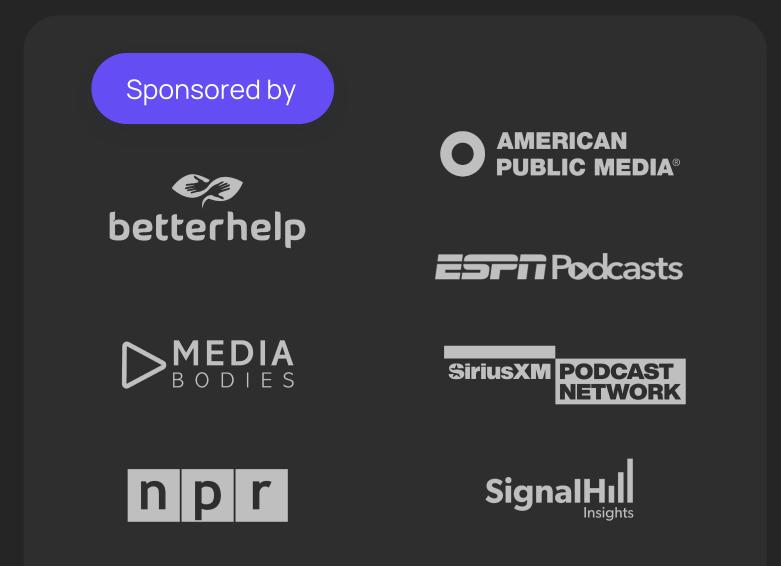
Authenticity of Messaging



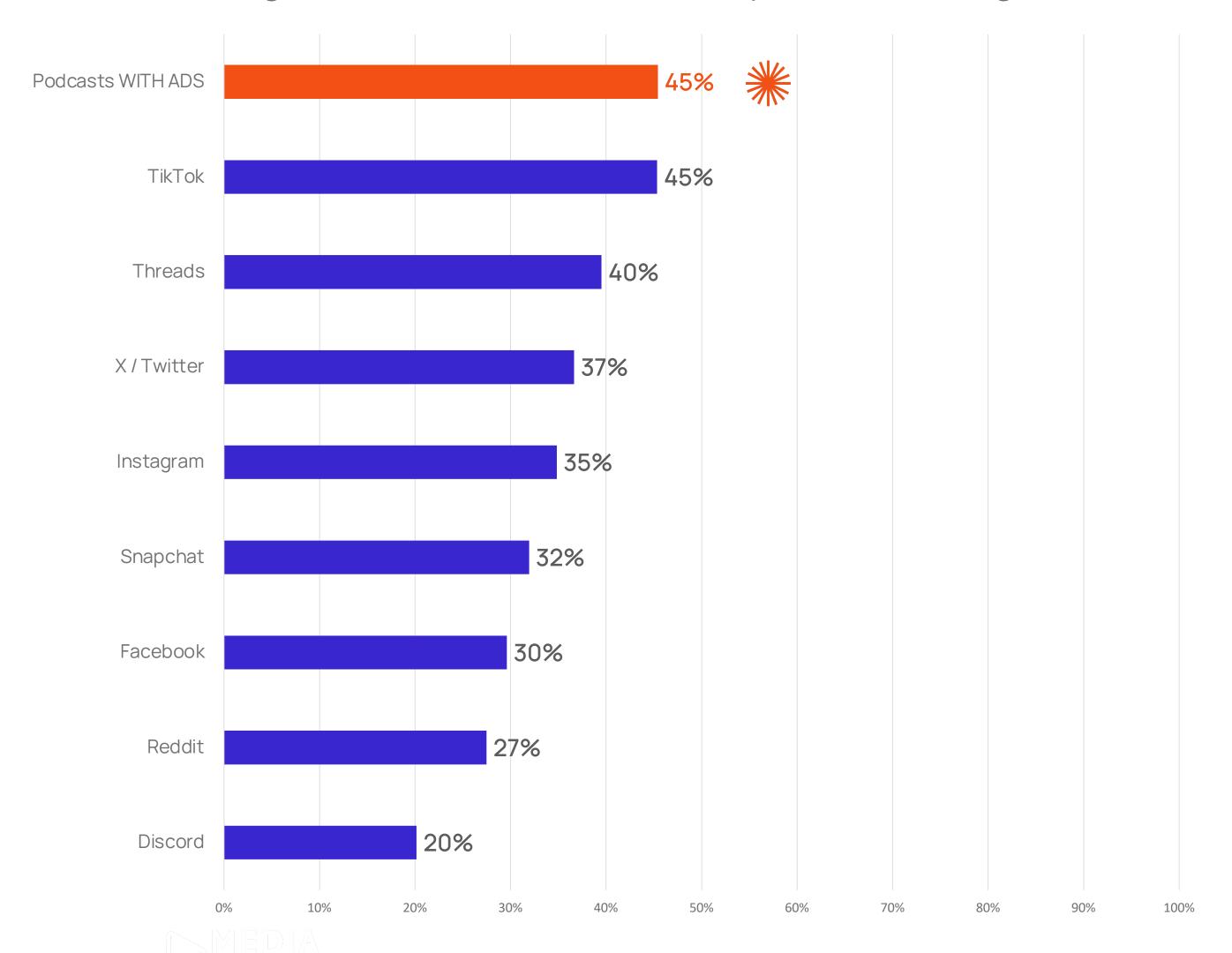
MEDIA

"The advertising on [MEDIA] feels authentic and natural"

% Agree – PRIME Users

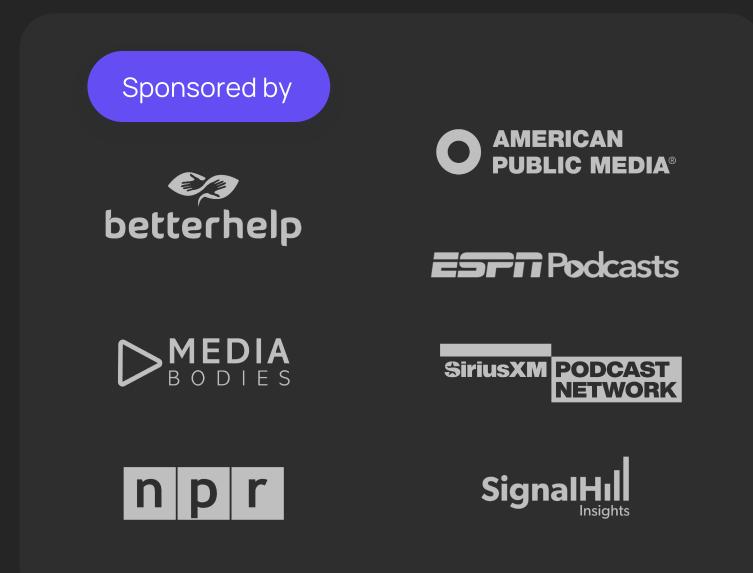


Podcasting Beats Social in Authenticity of Advertising



"The advertising on [MEDIA] feels authentic and natural"

% Agree – PRIME Users



Demographic	Podcast Advantage	Podcast Score	Social Media Average
Hispanic/Latino	+19 Points	59%	40%
55+ Adults	+17 Points	42%	25%
LGBTQ+	+14 Points	53%	39%
Male	+12 Points	49%	37%
18-34	+12 Points	48%	36%
Female	+8 Points	39%	31%
35-54	+5 Points	43%	38%

MEDIA

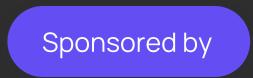




The messenger is crucial to the success of the message, and podcasting's messengers are among the best

"I trust the people delivering the advertising messages on [MEDIA]"

% Agree – PRIME Users









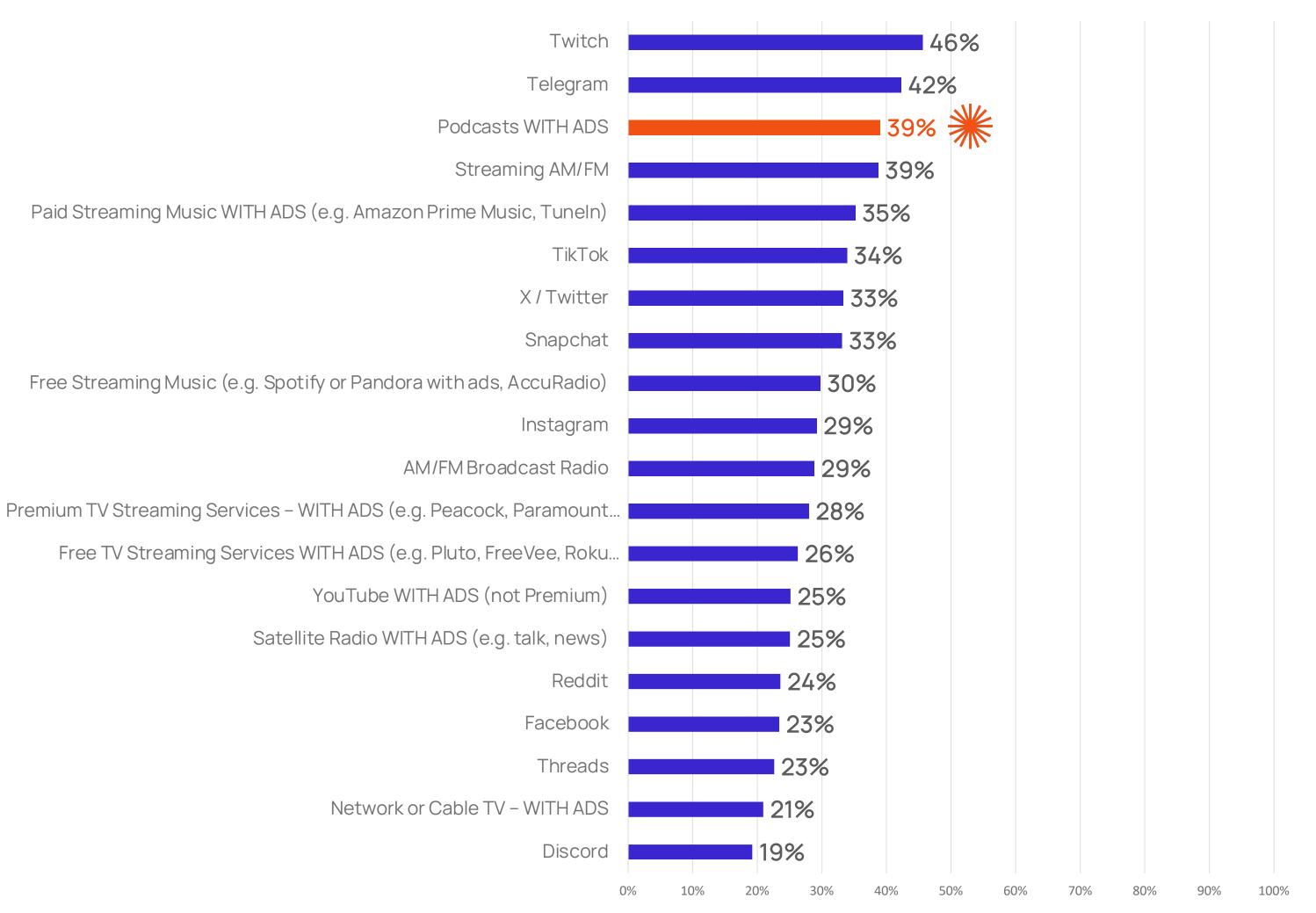








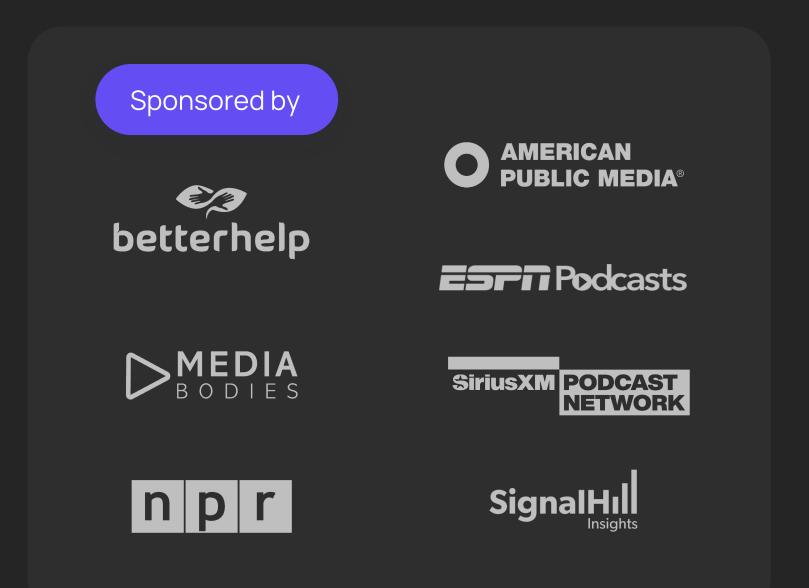
Consumers Trust the Voices of Podcasting



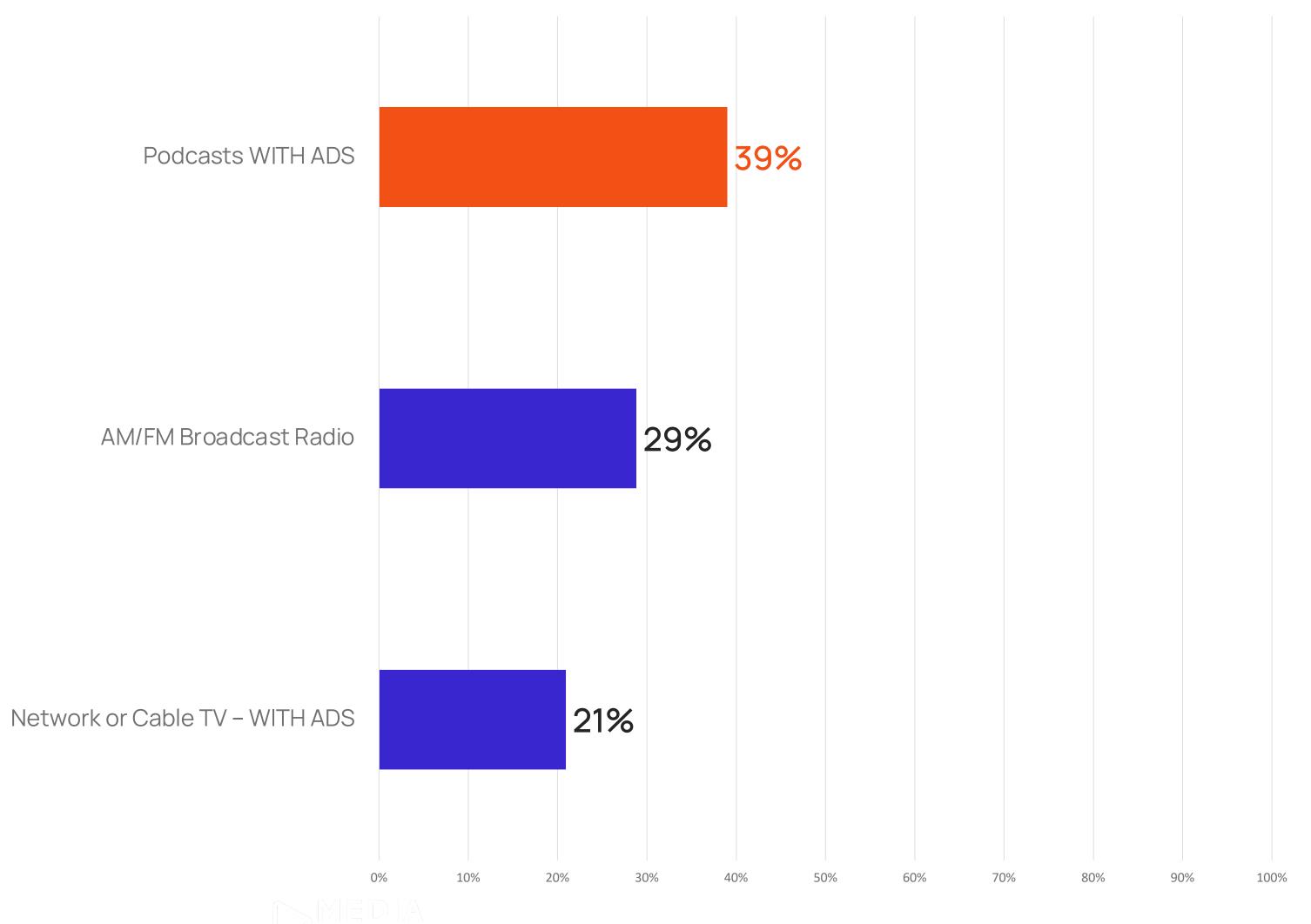
MEDIA

"I trust the people delivering the advertising messages on [MEDIA]"

% Agree – PRIME Users

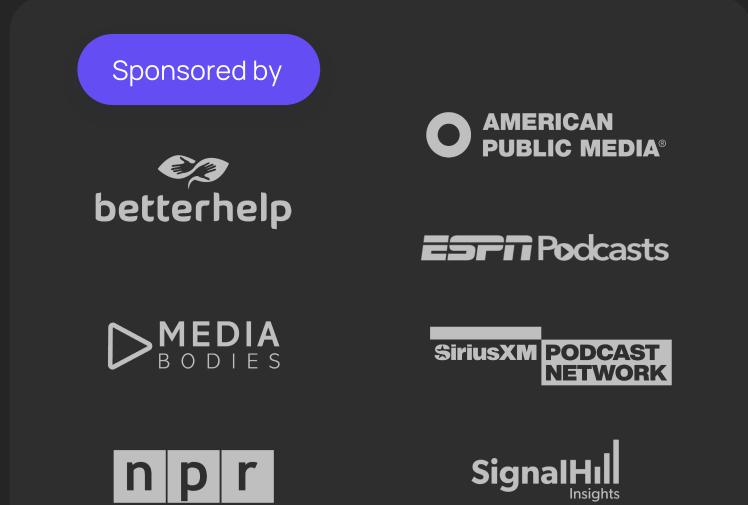


Traditional Media Trust in Decline

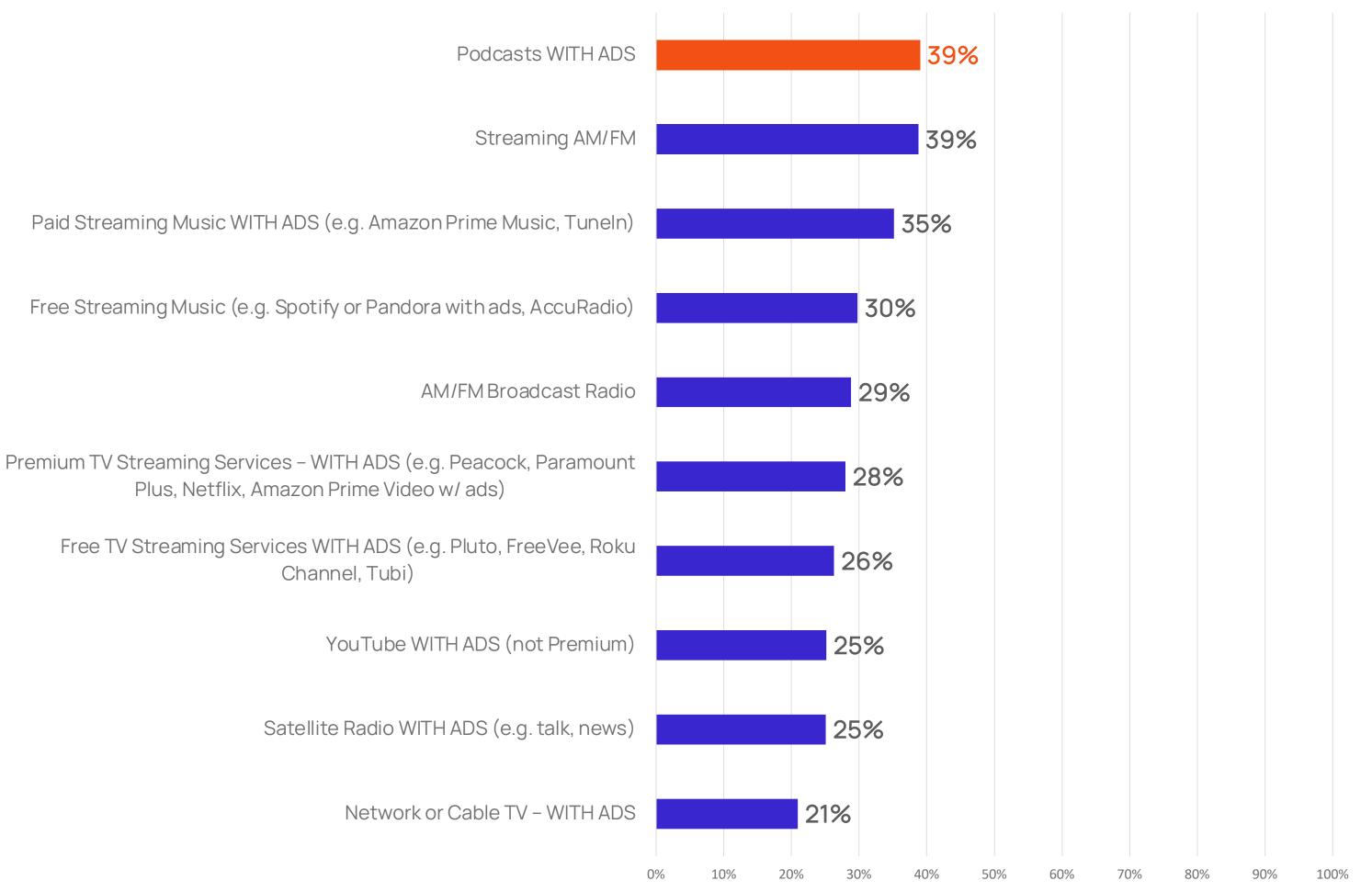


"I trust the people delivering the advertising messages on [MEDIA]"

% Agree – PRIME Users



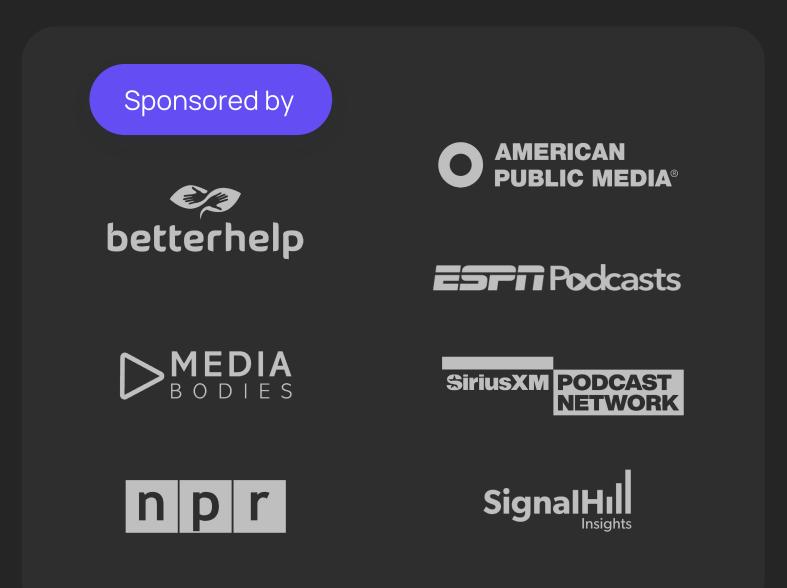
Podcasting, Streaming AM-FM Lead "Spot" Media in Trustworthiness



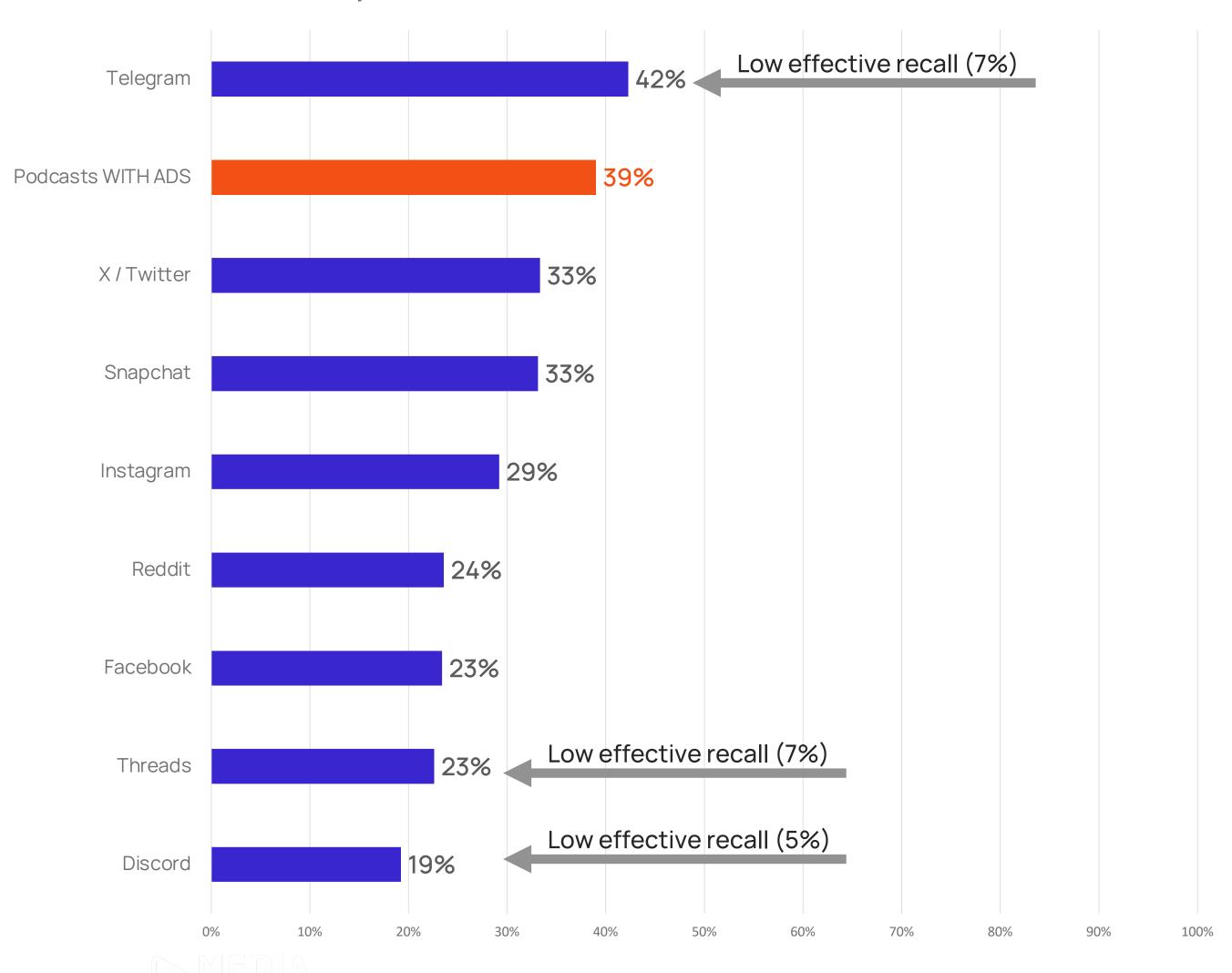
MEDIA

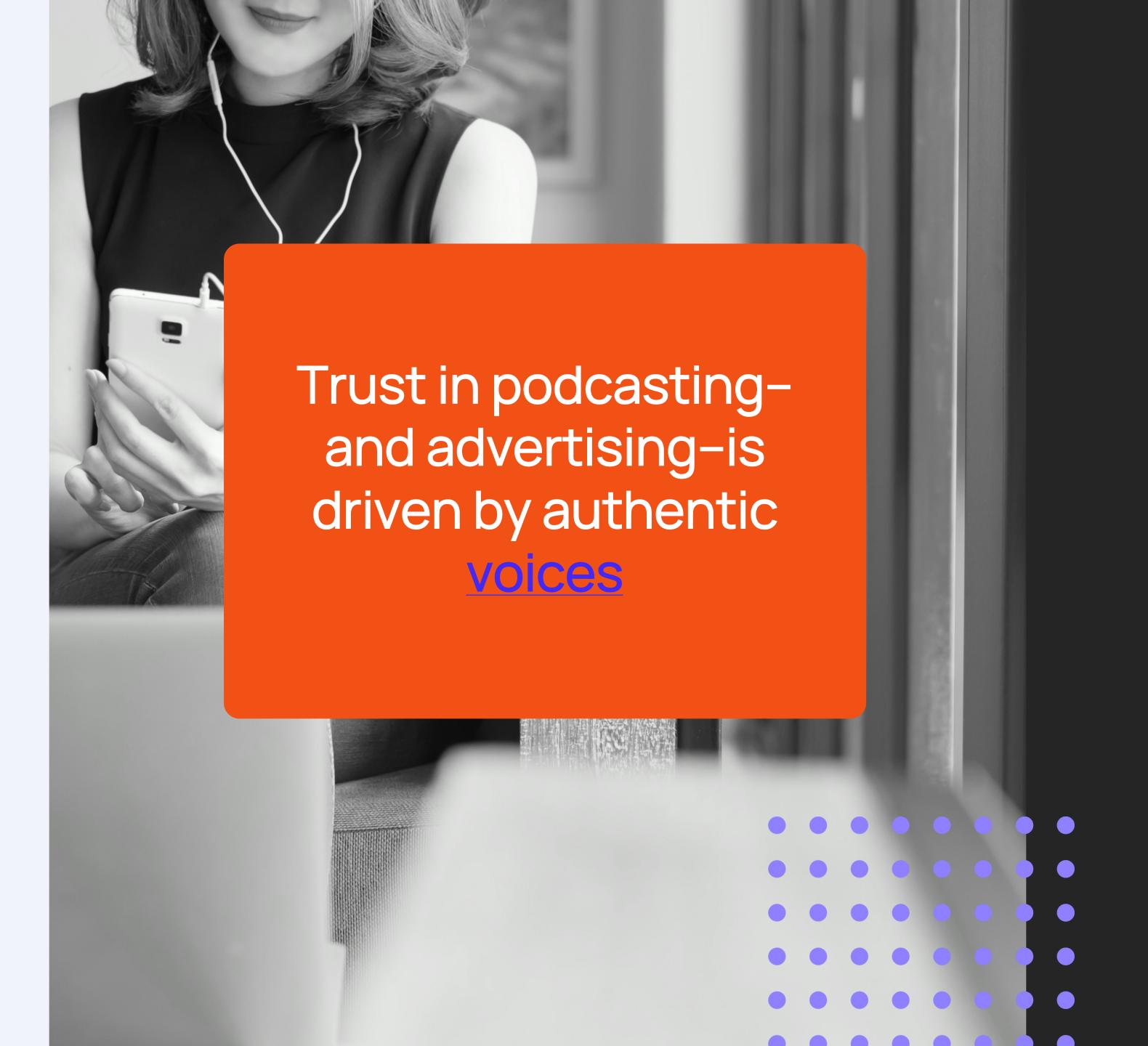
"I trust the people delivering the advertising messages on [MEDIA]"

% Agree – PRIME Users



Skepticism of Social Media







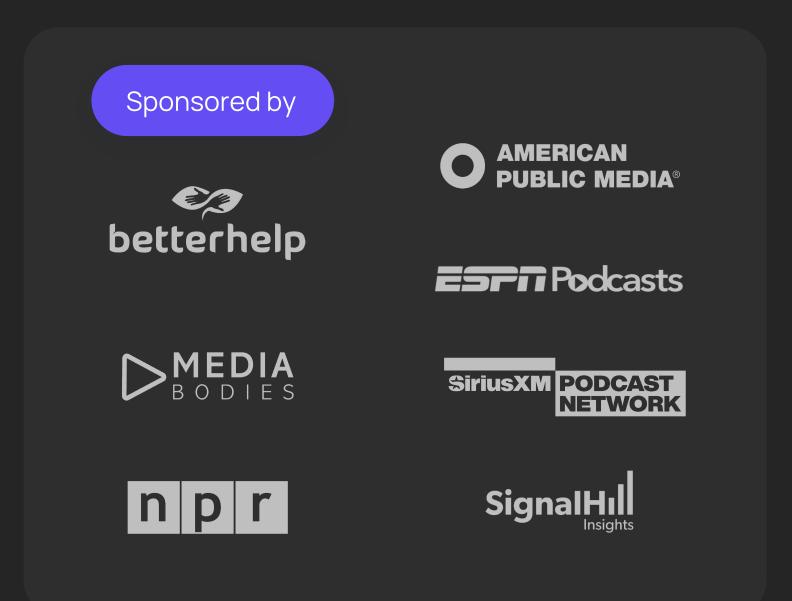
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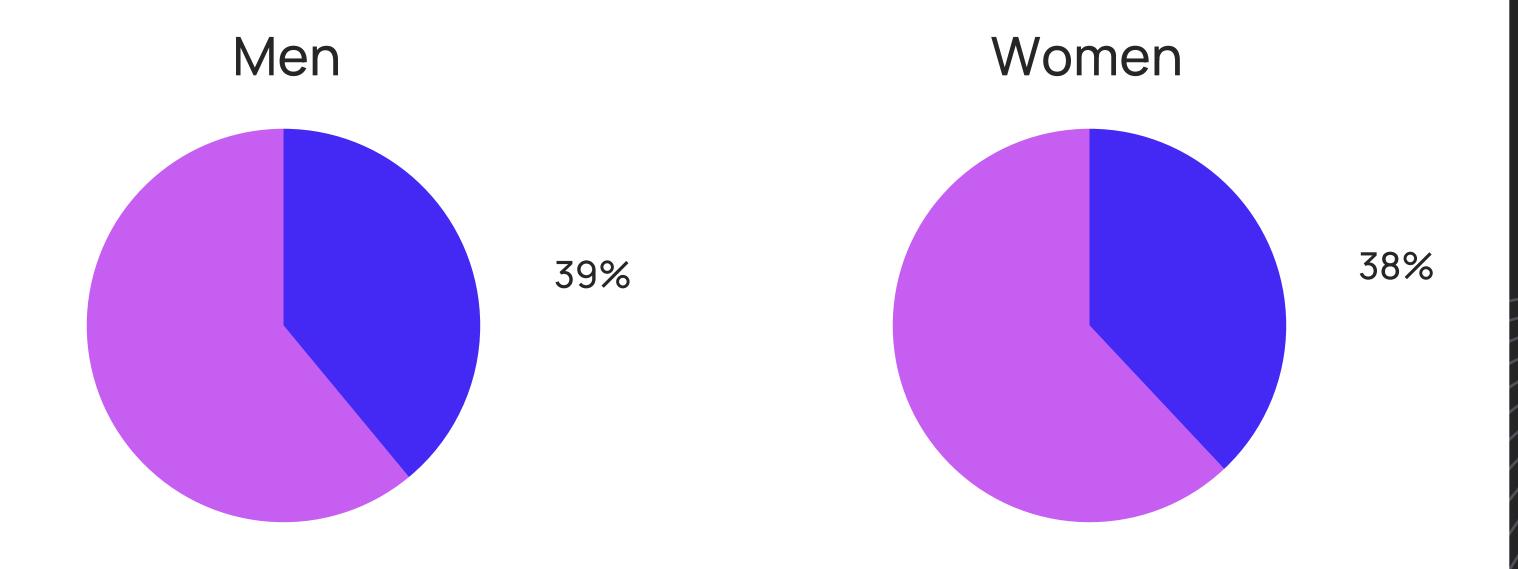
The trust in podcasting's authentic voices crosses all divides, regardless of age, gender, or race/ethnicity

"I trust the people delivering the advertising messages on Podcasts"

% Agree – PRIME Users



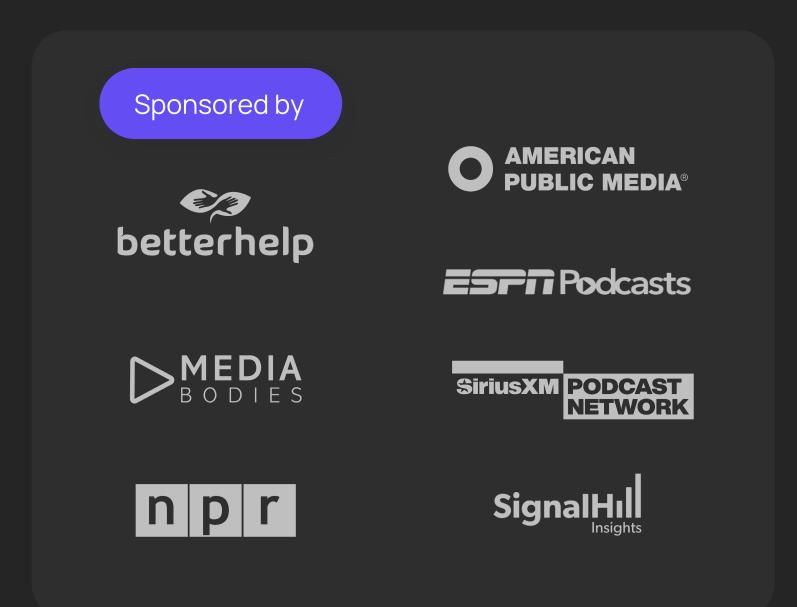
Men and Women Trust Podcast Advertising Equally



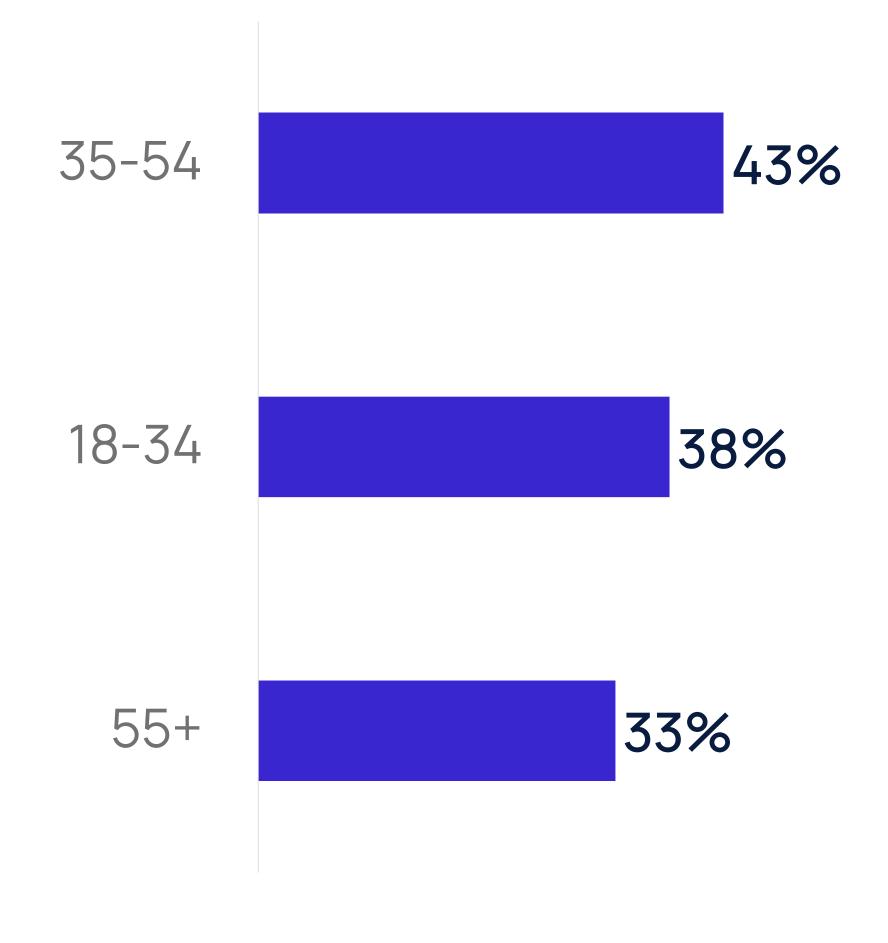
~MED]A

"I trust the people delivering the advertising messages on Podcasts"

% Agree – PRIME Users



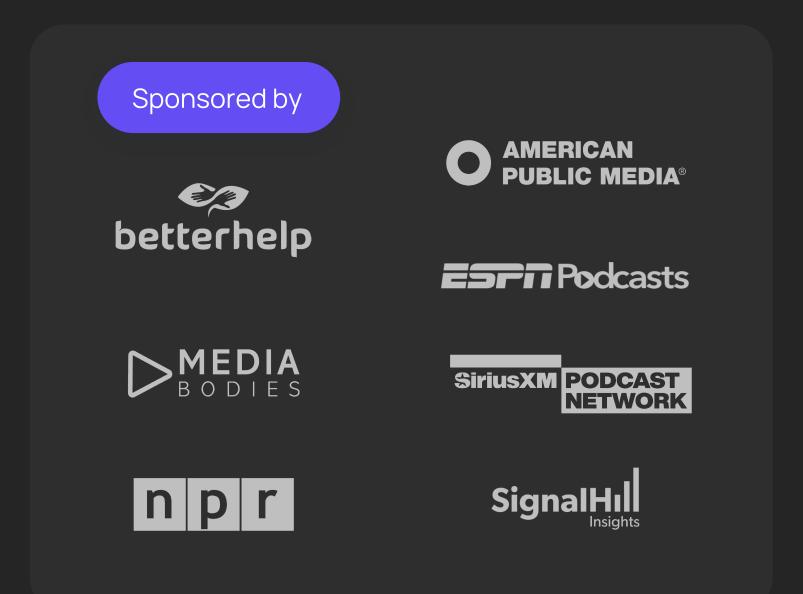
Trust In Podcast Advertising Highest Among 35-54s, Podcasting Still #1 In Trust Among All Media for 55+



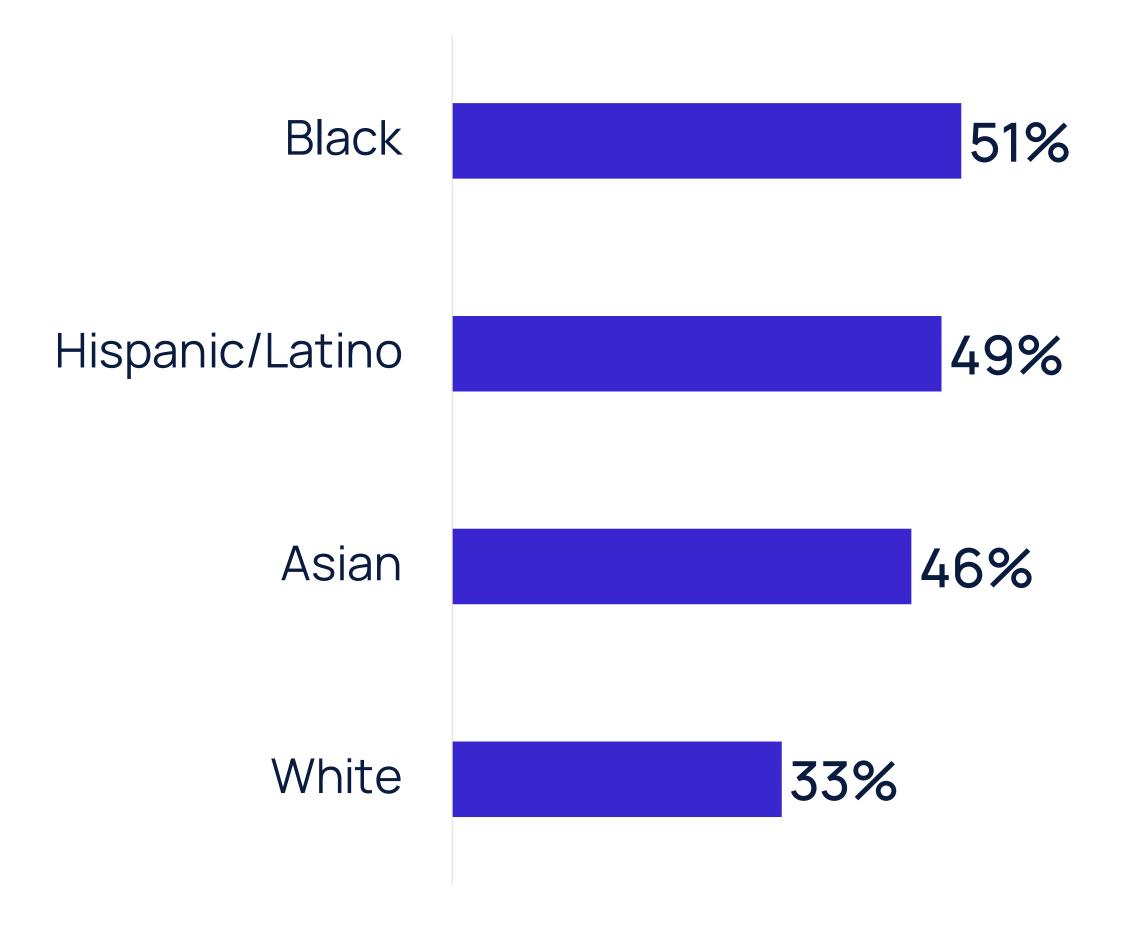
MEDIA

"I trust the people delivering the advertising messages on Podcasts"

% Agree – PRIME Users



Podcasting Particularly Trustworthy With Multicultural Audiences



NED]A



Summary

Podcasting punches well above its weight in attracting attention for advertisers

Podcasting may not have the overall reach of platforms like Facebook or Streaming TV, but the *effective* reach – the percentage of users recalling ads on each platform – reveals that audiences pay disproportionately more attention to podcast ads than other forms



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Summary

Attentiveness to podcast ads is equal with men and women

Podcasting's ability to gain the attention of women is particularly strong – where most other media show a significant attention gap, there is no drop-off in attentiveness with women to podcast advertising



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Summary

Podcasting is the most trusted medium

Reach and attention get your message heard – but podcast audiences' trust in the hosts of their favorite shows ensures that those messages get a fair shake



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Summary

Trust in podcast advertising is driven by credible content and authentic voices

Audiences perceive podcasting to be a medium that protects them from misleading information AND misleading advertising claims



• • • • • • •

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Summary

Trust in Podcast Ads is particularly high with multicultural audiences, women, and cuts across all demos

The self-selected nature of podcasts ensures that audiences gravitate towards hosts they find relatable, and that relatability translates to increased trust



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Summary

Social Media's lower credibility negatively impacts advertising messages

The "halo" effect extends in both directions – Americans' lower faith in the accuracy of content in social is associated with lower belief in the advertising claims made on social

SOUNDS BUSINESS OF PODCASTING PODCASTING

Coming Next from The Advertising Landscape!

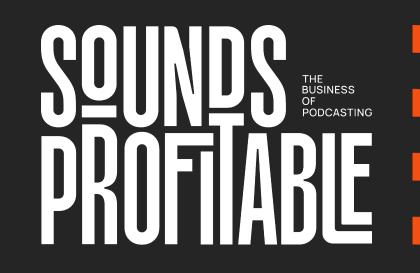
The Advertising Landscape 2025 Part Three: Effectiveness and Performance

- The Ad Environment and Experience
- Post-exposure Action
- Recommendation/Advocacy
- Purchase Behavior

"Après-Cannes", July 2025







Thank You.

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