Wondery Branding for Gen Z: Understanding How Gen Z Perceive Podcast Publishers

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Executive summary. Wondery is concerned with under-indexing in Gen Z listenership. This study approaches the problem through branding and aims to help Wondery decide whether to market to Gen Z as a different brand or not. Based on 106 valid responses from an online survey, 8 in-depth interviews, and content analysis of 130 podcasts, this study concludes that Wondery should not market to Gen Z as a different brand. Gen Z pay more attention to podcast content and hosts than publishers, so efforts should be focused on personalized content recommendations and promoting hosts rather than creating a new podcast publishing brand for Gen Z. Furthermore, by keeping the same branding, Wondery can leverage their ranking as a Top 2 podcast publisher to draw in new listeners. Wondery can also improve discoverability by capitalizing on readily available resources like YouTube's search engine.

Problem definition and approach

Podcasts are a relatively new form of media, with the term coined as modernly as 2004 (Hammersley, 2004), and the emergence of narrative-driven podcasts is even newer, often marked by the *Serial* podcast released in 2014 (Koenig, 2014; Quah, 2019). In 2016, podcast publisher Wondery was founded and has since risen to become one of the Top 2 podcast publishers in the US (Podtrac, 2022; Spangler, 2020). Wondery specializes in narrative-driven shows, emphasizing storytelling and a premium experience with high production value comparable to film and television, differentiating itself from public radio and other types of podcasts like interviews and conversational podcasts (Lin, 2019; Locker, 2019; Santo, 2021; Wondery, n.d.). However, while Wondery ranks amongst the top podcast publishers with the greatest unique monthly audience in the US, they are under-indexing in Gen Z listeners. This is particularly concerning as Gen Z spending power increases (Fromm, 2022; Petrock, 2021).

To address Wondery's Gen Z listenership, Wondery is interested to know more about Gen Z podcast listening behavior, Gen Z content preferences, and Gen Z perception of the Wondery brand. This study focuses on the last topic: branding. More specifically, Wondery asks whether the Wondery brand should be marketed to Gen Z as a different brand or not.

One of the challenges brands face with Gen Z in any industry is that Gen Z are less brand loyal than previous generations (Thangavel et al., 2022). Growing up with technology as digital natives with more information at their fingertips than ever, Gen Z have the luxury of choice (Francis & Hoefel, 2018; Narayanan, 2021; Prensky, 2001). Not only do they value quality, bargains, and convenience, but also social responsibility (Francis & Hoefel, 2018; Gomez et al., 2019). For Wondery, this could be a potential point of contention, given their high-profile acquisition by Amazon in late 2020 and how closely their brand is associated with Amazon, proclaiming themselves as "Wondery, an Amazon company" on both their website and LinkedIn profile (Amazon Music Team, 2020; Wondery, n.d.). After all, Amazon's notoriety has galvanized Gen Z movements, such as Prime Over People organized by Gen Z for Change, and in recent news, Amazon workers staged Black Friday protests organized by the Make Amazon Pay initiative in more than 30 countries (Botros, 2022; Delouya, 2022; More & Rosemain, 2022; Sherter, 2022; Sweney, 2022). On the other hand, Amazon is so deeply embedded in the digital and actual world that it is practically impossible to avoid, and people have come to rely on and even expect Amazon's convenience, regardless of the hidden costs to that convenience (Aoki, 2019; Hill, 2020; Jones, 2021). But before contending with Wondery's association with Amazon, a broader understanding of how Gen Z perceive podcast publishing brands must be explored.

While there is plenty of existing literature on branding in other industries, fewer have targeted podcasting, let alone podcast publishers. As such, this study aims to help Wondery answer the following management decision problem (MDP) and marketing research problem (MRP) about branding in podcast publishing:

> MDP: Should Wondery be marketed to Gen Z as a different brand or not?
>
> MRP: How effective is Wondery's brand at reaching and resonating with Gen Z?

Research design

Guiding the research are three key research questions (RQs), which focus on brand awareness and brand loyalty in podcasting, patterns in digital mediums beyond podcasting, and Gen Z on Wondery.

> RQ1: What podcasts and podcast publishing brands are Gen Z aware of, and what factors can explain Gen Z listening to multiple podcasts from the same podcast publisher?
>
> > H1a: Few Gen Z podcast listeners are aware of the Wondery brand.
> >
> > H1b: Explanatory factors for Gen Z listening to multiple podcasts from the same podcast publisher include accessibility (i.e. affordability, discoverability, etc.), fulfilled content preferences, and influencers/personalities (Southgate, 2017; Spotify Advertising, 2022).

Brand awareness and brand loyalty in podcasting should be studied in order to explain whether branding is an effective approach to increase Gen Z listenership. If Gen Z are not brand aware or brand loyal when it comes to podcast publishers, then even the most impressive rebrand or new brand will not have any effect on Gen Z listenership.

> RQ2: What content are Gen Z consuming on other digital mediums, and to what extent are they comparable to narrative podcasting?

> H2: Digital media like music and video streaming are comparable to narrative podcasting (Barber, 2021; Döring et al., 2022; Jones & Morris, 2022).

Digital mediums beyond podcasting should be studied in order to explain inevitable gaps in research in the podcasting industry. As podcasting is a relatively new form of media, trends in comparable digital mediums can inform decisions in podcasting where research is lacking, especially as it relates to media consumption habits and implications that might have on branding.

> RQ3: What segments of Gen Z podcasts listeners can be distinguished, and how important is a premium podcasting experience to different segments?
>
> > H3a: Characteristics that define segments of Gen Z podcast listeners with different podcast listening behaviors include gender and household income (Chan-Olmstead & Wang, 2020; Vogels et al., 2022).
> >
> > H3b: The importance of a premium podcasting experience varies between different segments.

Wondery's current branding as a premium podcast publisher should be studied in order to explain the value that Wondery can bring to different segments of Gen Z podcast listeners. If branding for podcast publishers is an effective approach to reach Gen Z listeners, it must then be determined whether or not Wondery's branding aligns with what Gen Z listeners are seeking. As not all podcast listeners have the same motivations (Chan-Olmstead & Wang, 2020), different segments must be considered. If Wondery's brand aligns with Gen Z values, then it will not be necessary to rebrand or create a new brand.

To answer the RQs, data was collected from a quantitative survey distributed to 151 respondents, 8 qualitative in-depth interviews (IDIs), and content analysis on 130 podcasts.

The online Qualtrics survey used a convenience sample and was distributed through personal contacts and various university message boards, though primarily universities in California. The survey received 151 responses total. Only survey responses that were completed from beginning to end by 18-25 year olds from unique IP addresses were kept, leaving 106 valid responses for analysis. The demographics of the sample skewed toward the older end of Gen Z as shown in Appendix E Figure 1, and there were slightly more female respondents (57) than male respondents (47) as shown in Appendix E Figure 2. There was a mix of podcast listening frequencies including both podcast listeners (85) and non-podcast listeners (21) as shown in Appendix E Figure 3. The podcast listeners included 4 Wondery listeners.

The IDIs were conducted with podcast listeners only, and also used a convenience sample. Interviewees were selected from personal contacts and survey respondents who opted to be contacted for follow-up interviews. In order to build rapport, the moderator for each IDI was selected based on the researcher who was most familiar with the interviewee. 7 interviews were conducted over Zoom and 1 was conducted in person. Of the 8 interviewees, 1 was a Wondery listener.

The content analysis of 130 podcasts coded for podcast publishers. The 130 podcasts were collected based on 63 responses to a short answer question on the quantitative survey asking, “What podcast(s) are you currently listening to or used to listen to?” Of the 130 podcasts, 3 were Wondery podcasts. In cases where the podcast publisher was undetermined, the podcast name was used instead so that the podcast would still be represented in the analysis, or if the podcast was based on the podcast host/personality, then the podcast host was used instead of the podcast name.

Results

First and foremost, the quantitative research findings corroborated Wondery’s concern about under-indexing in Gen Z listenership. Amongst the 85 survey respondents who were podcast listeners, only 4 (5%) were self-identified Wondery listeners. Survey respondents were asked to select podcast publishers they had listened to from a curated list of 22 podcast publishers that was partially drawn from the top 20 podcast publishers in the US (Podtrac, 2022), blinding Wondery. Although 4 Wondery listeners isn’t the most impressive statistic, it is notable that Wondery tied 4 ways for 10th most listeners amongst the 22 podcast publishers, the top 5 podcast publishers were those already established in traditional media like news and radio, and the top response with 30 selections (35%) was “None / Don’t know” (see Appendix E Figure 4). This leaves the potential that there are podcast publishers who do have some listenership, but their listeners might not be aware of them.

In order to account for those podcast publishers, survey participants were asked to name podcasts they listened to, then those podcasts were coded for podcast publishers through content analysis. The content analysis identified 2 Wondery listeners (see Appendix E Figure 5). Again, it is notable that Wondery tied 16 ways for 7th most listeners amongst the 106 unique podcast publishers that were coded, leaving 84 podcast publishers trailing behind them with 1 listener each. However, not too much weight can be given to these statistics, as it is unlikely that survey respondents listed every podcast they ever listened to, so the sample is not representative. More interestingly, the two Wondery listeners identified through content analysis both self-identified as Wondery listeners in the survey. Furthermore, one of those listeners only listed 1 podcast they listened to, which was the Wondery podcast *Business Wars*, and the other listener listed 8 podcasts, 2 of which were Wondery podcasts: *Morbid* and *Scamfluencers*. In terms of brand awareness and brand loyalty, this is promising for Wondery, though a greater sample is needed before any conclusions can be drawn. Tentatively, while Wondery may not be reaching many Gen Z, they are taking advantage of the attention they are getting and making an impression on the few listeners they are attracting; Wondery listeners know they are listening to Wondery podcasts, and some even go back for more. The content analysis also made clear that Wondery is one of the most consistently branded podcast publishers, with the Wondery name consistently displayed in podcast thumbnails and podcast episode descriptions, and the Wondery jingle consistently played in the podcast intro.

Second, considering the number of respondents who self-reported that they did not know the podcast publishers they listen to, it comes at no surprise that podcasts are not common motivating factors to listen to podcasts, but podcast content and podcast hosts are. Amongst the 85 survey respondents who were podcast listeners, only 6 (7%) responded that podcast publishers were a motivating factor, whereas the top two motivating factors were podcast content/topic and podcast host, with 47 selections (55%) and 45 selections (53%), respectively (see Appendix E Figure 6).

This finding is supported by another part of the quantitative survey where respondents were asked, “What podcast(s) are you currently listening to or used to listen to?” This question sought exact podcast names, but some responses were podcast hosts or podcast genres (i.e. podcast content/topic) – such as “Jenna Marbles podcast” for the podcast *Jenna and Julien*, “Jay Shetty mostly” for the podcast *On Purpose*, “true crime,” “finance,” “esports” – which had to be cleaned or removed before analysis. While the invalid responses could not be used directly, they reveal how some listeners remember podcasts in terms of podcast host or genre.

This finding is further supported through an analysis of loyal podcast listeners, defined as those who have listened to more than one podcast from the same podcast publisher. Loyal listeners are an interesting segment to consider because podcast publishers not only want to attract listeners but also retain them. The content analysis identified 6 loyal listeners. For three of the listeners, the podcasts from the same podcast publisher were in fact hosted by the same podcast host: *Dear Hank and John* and *The Anthropocene Reviewed* co/hosted by John Green, *Are You Scared?* and *Watcher Weekly* co-hosted by Ryan Bergara and Shane Madej, and *Rotten Mango* and *Baking a Murder* hosted by Stephanie Soo. For the other three listeners, the podcasts from the same podcast publisher were the same genre: true crime podcasts *Morbid* and *Scamfluencers*, finance podcasts *Planet Money* and *The Indicator*, and news and politics podcasts *The Run Up* and *The Daily*.

Third, although listeners do not pay much attention to podcast publishers, podcast content/genres can shape listeners’ impressions of podcast publishers, and a podcast publisher’s ranking can as well. The one Wondery listener recruited for the IDI provided an invaluable opportunity to directly ask about his impression of Wondery, to which he responded: “I don’t really know anything about Wondery except that I listen to a lot of their true crime,” referring to *Morbid* and *Scamfluencers*. Another interviewee, though not a Wondery listener, subscribed to a few podcasts from Gimlet Media, and his impression of them was based on the podcast content/genre as well, recalling his preference for chatty, informational podcasts. In fact, Gimlet Media, like Wondery, is known for their narrative podcasting (Podyssey, n.d.), and yet the interviewee had no impression of that aspect of Gimlet Media. Not only can genres shape listeners’ impressions of podcast publishers, but there is also the implication that listeners who listen to different genres from the same publisher can have different impressions of the same publisher.

The Gimlet Media listener was then asked about his first impression of Wondery while exploring the website, but he had also pulled up Apple Podcasts on his iPhone, upon which he discovered that Wondery is a Top Subscriber Channel on Apple Podcasts, to which he commented: “Now I might be more interested if I saw a Wondery podcast somewhere. They should have good quality.” In other words, the high ranking was perceived as a value judgment on quality and trustworthiness. While the interviewee doesn’t intend to go out of his way looking for Wondery podcasts to listen to, he said that if a Wondery podcast popped up while he was searching a particular topic, he would be more inclined to try out an episode. Other interviewees who were asked about their first impression of Wondery only engaged with the website, and most didn’t feel like they had enough to go on to form a strong impression.

Fourth, given Wondery’s specialty in storytelling, a genre of particular interest is story/audio dramas. Segmenting for story/audio drama listeners, the listener profile that emerged was females who listen to podcasts for entertainment. Amongst the 15 story/audio drama listeners, 80% were female and 20% were male. While the demographic distribution of all 85 podcast listeners were slightly skewed toward females at 57%, a clear distinction in demographic distribution is made amongst story/audio drama listeners (see Appendix E Figures 7-9). This is supported by existing literature on podcast listening behavior differing by gender (Tobin & Guadagno, 2022).

Another distinction amongst story/audio drama listeners is their primary podcast listening motivation. Existing literature shows that entertainment and education are the two main categorizations for podcast listening motivation, and identifies a gap in the literature for segmenting for those motivations (Chan-Olmstead & Wang, 2020; Craig et al., 2021). As such, the quantitative survey included a broad question about podcast listening motivation, providing “Entertainment,” “Education/information,” “Both,” and “Neither” as answer options in order to see if any obvious patterns would arise. Amongst 85 podcast listeners, approximately half answered “Both,” and the other half was split evenly between “Entertainment” and “Education/information” (see Appendix E Figure 10). However, amongst 15 story/audio drama listeners, approximately half answered “Both,” and the other half answered “Entertainment”; none listened to podcasts solely for “Education/information,” though that is not to say that story/audio drama listeners do not listen for education/information at all, as half selected “Both” (see Appendix E Figure 11). Nevertheless, this distinction from general podcast listeners is clear. Story/audio drama listeners value entertainment in their podcast listening experience.

Fifth, besides storytelling, Wondery is known for their premium podcasting experience. However, findings show that Gen Z are not particularly keen on paying for a premium podcasting experience. When asked to describe a premium podcasting experience and whether or not that would be something they would be interested in, all interviewees quickly honed in on the aspect of having to pay for a premium and unanimously agreed that it was not something they were interested in doing. The Wondery listener later amended that he would potentially consider paying a premium for an ad-free experience. He noted that as a non-premium listener, he would not consider Wondery’s podcasting experience immersive due to the ads.

Another interviewee shared that while he pays for Spotify Premium for an ad-free experience, it would feel “wrong” to pay another premium for his podcasting experience. For a free experience, most interviewees were satisfied with the limited number of ads and production quality. One interviewee was extremely averse to both ads and subscriptions of any sort – i.e. Spotify Premium, Amazon Prime – and for him, a free experience took precedence over an ad-free experience; he would rather have to pull out his phone and skip all the ad-reads manually than pay a subscription, and indeed, that is what he does. Furthermore, he and one other interviewee shared that they would rather give money directly to a creator than pay a subscription. All interviewees agreed that if there was exclusive content they were interested in that was locked behind a paywall, they would seek out free options instead. One shared that he would only consider paying for exclusive content if the free options were limited, giving Netflix for video-on-demand (VOD) as an example. However, currently there are many free options in podcasting for listeners to turn to, as podcasting hasn’t yet reached the level of platform exclusivity that VOD services have.

These qualitative findings are supported by quantitative data as well. Survey respondents were asked to rank several podcast platform features – many of which were inspired by Wondery’s offerings – on a 5-point Likert scale from “Not at all important” to “Extremely important.” Amongst the 85 survey respondents who were podcast listeners, the top features were ease of use and subscription price, and the least important feature was exclusive shows (see Appendix E Figure 12). In fact, recent news about Spotify’s layoffs at Gimlet Media reveal concerns about exclusivity models from a business standpoint as well. While exclusive podcast hosts with followings predating their podcasts can bring listeners to a platform, other types of podcasts have faced drops in listenership since exclusivity (Shapiro, 2022). This is consistent with earlier findings about how listeners follow podcast hosts.

Finally, while podcast listeners may not be familiar with Wondery or podcast publishers in general, Wondery’s parent company is infamous. Given Amazon’s questionable practices and how Gen Z hold companies socially accountable more than previous generations, there was concern that Wondery’s association with Amazon would negatively impact Gen Z’s impression of Wondery. However, amongst 8 interviewees, only one had an extremely negative impression of Amazon while the others felt neutral about Amazon and were not aware of Amazon’s bad reputation.

The interviewee with a negative impression of Amazon was generally skeptical of Big Tech companies in terms of privacy, security, morality, and ethics. He actively boycotts Amazon products and services like Amazon Prime, Alexa, and Ring, though he still uses Twitch and Goodreads, all of which are Amazon owned. When asked whether knowing that Wondery is an Amazon company would deter him from listening to a Wondery podcast, he said it wouldn’t because he felt that Wondery was far enough removed from Amazon. Although the 8 interviewees are not a representative sample of Gen Z, it is insightful to hear from a potential outlier that his extreme negative sentiment toward Amazon was not extended toward Wondery. As even the interviewee with the most extreme sentiment about Amazon was still open to listening to Wondery podcasts, it is reasonable to predict that those with less extreme sentiments about Amazon would be even less likely to extend negative sentiments toward Wondery.

While the other interviewees did not have opinions about Amazon's morals and ethics, one interviewee shared his impression that Amazon does not specialize in media, but rather in ecommerce, explaining that "Netflix feels better than Amazon Prime Video" and "Spotify feels better than Amazon Music." This is reflected in the quantitative survey, which shows Netflix as the leading VOD service and Spotify as the leading music streaming service (see Appendix E Figures 13-14). Looking at the usage of music streaming platforms, it is startling how similar it is to the usage of podcast listening platforms: both show Spotify as the leading platform by a wide margin, followed by YouTube, Apple, then Amazon (see Appendix E Figures 14-15). Similarities between music and podcasting have been studied by experts as well, with some pitting music and podcasts as competitors in the audio market (Jones & Morris, 2022). This is reflected in the qualitative IDIs, where former podcast listeners shared about switching away from podcasting into music, in addition to other digital mediums including non-podcast content on YouTube and Twitch streams.

While Amazon is not competitive in podcasting or music compared to Spotify, YouTube, and Apple, it ranks as the second most popular VOD service, which could signal an opportunity for Wondery's podcast-to-TV adaptations. As for YouTube's prominence as a podcasting platform, while an untraditional platform for podcasting, is corroborated by industry research, which shows that YouTube is not only the top social media platform amongst Gen Z, but has also risen as a top podcasting platform (Goldman, 2022; Google Ads, 2022; Shapiro, 2022; Vogels et al., 2022). One interviewee shared about how he used to listen to a lot of daily shows on Apple Podcasts but currently opts for the same content on YouTube, even when he is not necessarily interested in the visual aspect, sharing how he will sometimes pull up a daily show on YouTube from his laptop, set his laptop aside, and lie in bed while listening to the show. Another noted how he liked YouTube's visual aspect, even if it was just a still image. Other interviewees lauded YouTube's searchability, finding it an easier experience than searching for content through more traditional podcasting platforms. Indeed, search and recommendations are some of the greatest challenges in podcast information access today (Jones et al., 2021).

In summary:

1. There are not that many Wondery listeners, but Wondery makes some impression on their listeners.
2. Podcast publishers are not common motivating factors for listeners, but podcast content and podcast hosts are.
3. Listeners' impressions of podcast publishers can vary based on the content/genres they listen to, and can also be influenced by rankings.
4. Story/audio drama listeners are mostly females who listen to podcasts for entertainment.
5. Listeners are not particularly keen on paying for a premium podcasting experience.

6. There is not a strong sentiment about Amazon. Even those who had a strong negative sentiment felt that Wondery was far enough removed.

Recommendations

Wondery should not be marketed to Gen Z listeners as a different brand. Gen Z do not pay much attention to podcast publishers, so Wondery's branding efforts would likely go unnoticed by Gen Z. While Wondery's parent company Amazon is notorious, Gen Z still perceive Wondery independently from Amazon despite the close business partnership, so any negative impression of Amazon is unlikely to harm Wondery's reputation or listenership. Thus, there is no need to adjust Wondery's branding to strengthen or weaken its association with Amazon.

One major advantage to keeping the same branding is that Wondery can leverage their ranking to draw in new listeners. As Gen Z do not have a strong impression of podcast publishers, rankings can direct their impression. It can be difficult for prospective listeners to make judgments about the quality of a podcast or podcast publisher and whether they'd be worth checking out, but it is much easier for prospective listeners to form a judgment based on a quantified ranking. Prospective listeners may not know that Wondery is a premium podcast publisher that offers high quality podcast listening experiences, but seeing Wondery as the Top Subscriber Channel on Apple Podcasts can quickly convey credibility and inspire trust.

While Gen Z do not have a strong impression of podcast publishers, they do have a strong impression of podcast content and podcast hosts. As such, to appeal to Gen Z through podcast content, Wondery should offer personalized recommendations based on content preferences, directing listeners' attention rather than molding their brand to fit listeners' attention. For example, if Wondery wants to reach a segment of listeners who prefer highly immersive podcast listening experiences and a segment of listeners who prefer more casual experiences, Wondery does not need to create a new brand to separate the high production podcasts from the low production podcasts. Wondery can simply offer both, then direct each type of listener with the appropriate recommendations.

To appeal to Gen Z through podcast hosts, Wondery can invest more in promoting and supporting their talent. Furthermore, Wondery should be prudent about which shows they make exclusive, as other podcast platforms have found that while exclusive talent can draw in new listeners, other types of podcasts that are not centered around the talent do not perform as well as exclusive podcasts. Additionally, Gen Z generally would rather search elsewhere for free content, such as YouTube, than pay a premium for exclusive content.

As a top podcast listening platform, YouTube offers a great opportunity to reach both podcast listeners and non-podcast listeners. Although Wondery already has a YouTube channel with 47,000+ subscribers, the low average views per video on their most recent videos show room for growth. Beyond uploading visually engaging content, Wondery can also capitalize on YouTube's superior search engine to increase the discoverability of their podcasts. For example, Wondery can upload podcast trailers, which could freshen their channel as well as drive listeners to Wondery podcasts on other platforms. Additionally, Wondery's activity on YouTube can be better integrated on the Wondery website, such as by embedding videos on podcast pages.

Limitations

The overarching limitation to this study is the sample for both the quantitative survey and qualitative IDIs. Not only are the sample sizes insufficient, but also the convenience sampling method risks sampling bias and is not representative of the population of Gen Z. Because the quantitative survey was primarily distributed through personal contacts and various university message boards, the demographics of the quantitative survey respondents were very similar to that of the researchers: older, educated Gen Z. A simple random sample would be a more ideal and representative sampling method. Survey distribution tools like Amazon Mechanical Turk can help reach survey respondents outside personal social circles but also come with potential drawbacks such as self-selection bias and skewing toward a more technologically literate subset of the population. As for the qualitative IDIs, only one of the interviewees was a Wondery listener, so recruiting more Wondery listeners and story/audio drama listeners would have provided more explanatory power in the research.

While only one Wondery listener was interviewed, all interviewees were asked to explore the Wondery website and share their first impression of Wondery based on that interactive experience. However, podcast websites are not typically how podcast listeners interact with podcasts; only 2% of survey respondents selected podcast websites as a motivating factor to try a podcast (see Appendix E Figure 6). Nonetheless, Wondery's website was chosen for the interactive activity during the IDIs because it was more consistent than asking interviewees to engage using their primary podcast listening platform, and more accessible and logistically streamlined than asking interviewees to download a particular podcast listening platform.

The content analysis on 130 podcasts encountered limitations as well. The 130 podcasts were collected based on 63 responses to a short answer question on the quantitative survey asking, "What podcast(s) are you currently listening to or used to listen to?" so responses to this question were unlikely to be representative of all podcasts a respondent had ever listened to. For example, limited series podcasts could be left out of these responses if a respondent didn't consider it part of their core rotation of podcasts, but rather just a phase of their podcast listening experience. The potential gap in this understanding could affect a subset of story/audio drama podcasts and listeners.

These limitations should be addressed in future work. Additionally, this research can be further supported by working in close collaboration with the analytics and research team at Wondery. While the quantitative research was designed to directly help answer the question of whether Wondery should be marketed to Gen Z as a different brand, it was also designed to help understand the landscape of Gen Z podcast listeners in general. With access to Wondery's listener data and podcast data, the quantitative survey could be more focused and work to expand on Wondery's findings, avoiding repetitive efforts and taking better advantage of survey respondents' attention. Access to Wondery's listener data could also help better identify interviewees of interest for IDIs.

Conclusion

To answer RQ1, Gen Z generally are not aware of podcast publishing brands, and Wondery is no exception, but they do have a slightly greater awareness for brands that have already been established in other more traditional media like news and radio. Factors that explain Gen Z listening to multiple podcast from the same podcast publisher include podcast content/genre and podcast hosts.

To answer RQ2, the media that competes closest with podcasting is music. Gen Z exhibit similar podcast listening platform usage and music streaming platform usage. While VOD service usage is slightly different, Wondery has taken the lead in innovating at the intersection of podcasting and television since their inception. Their partnership with Amazon raises exciting prospects, especially with Amazon Prime Video as a top VOD service.

To answer RQ3, Gen Z generally are not keen on paying for a premium podcasting experience – regardless of gender, household income, podcast listening frequency, or other segments – and a free experience takes precedence over the perks of premium podcasting. However, gendered segments are distinguished in terms of preferred genres.

Based on these findings, Wondery's premium podcasting experience does not resonate strongly with Gen Z. However, this does not mean that Wondery needs to rebrand or create a new brand, because Gen Z do not pay much attention to podcast publishers. Rather, Wondery can draw in Gen Z listeners through podcast content and podcast hosts.

As the podcasting industry continues to grow, it becomes increasingly difficult to stand out in an oversaturated space. The industry is constantly evolving, and so are the consumers. With Gen Z spending power increasing, the competition for their attention stiffens. However, podcast publishers do not have very much visibility in their industry like companies in some other industries might. Many podcast listeners are not aware of who is publishing the podcasts they listen to, and that is certainly true for Gen Z.

This study determines that podcast publishers like Wondery do not need to devote new brands to attracting Gen Z listeners. Established companies like Wondery should maintain their brand and leverage their position at the top of their industry, rather than divide their efforts building up new brands. With these recommendations and continued research, Wondery is keeping a finger on the pulse. When Gen Z take over the economy, Wondery will be ready for them.

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Appendix A

Contributors

This study is a collaboration between Audrey Lin, Siddhant Manish Chawla, and Yanhua Lu. While the MDP and MRP were taken from Lin's individual project proposal, the RQs were refined based on the individual project proposals of all three researchers. With the problems and research questions defined, all three researchers worked together on the research design and methodology. Once the quantitative survey and qualitative IDIs were piloted, each researcher was involved in data collection by distributing the survey and moderating IDIs. After conducting the IDIs independently, Chawla collated the recordings, and all three researchers came together to debrief and discuss emerging patterns. The quantitative data was cleaned, analyzed, and visualized by Lin, as was the content analysis. For the paper, the executive summary was authored by Lin, the problem definition and approach co-authored by Lin and Lu, the research design authored by Lin, the results and recommendations co-authored by Lin and Chawla, and the limitations and conclusion authored by Lin.

Appendix B

Methodology

Quantitative research: Survey questions

Introduction: Welcome to this survey! We are a group of USC Annenberg students working on a project that analyzes Gen Z aged 18-25 and their impression of podcasting companies. We are interested in learning about your opinions and perceptions. There are no right or wrong answers. Your answers are confidential and anonymized. The survey will take 5 minutes to complete. Thank you in advance.

Screener

1. How old are you? [Short answer] [Continue survey if 18-25. Otherwise, show the following message, then go to the conclusion and exit survey: We are only accepting responses from Gen Z aged 18-25. Please proceed to the exit survey.]

Demographics: Research shows that podcast listening habits differ between demographics. The following questions aim to distinguish demographic differences. Your answers are confidential and anonymized.

2. What is your gender? [Select one]
    - Female
    - Male
    - Non-binary / Third gender
    - Prefer not to say
3. What is your household income? [Select one]
    - Less than $50,000
    - $50,000 - $99,999
    - $100,000 - $150,000
    - More than $150,000
    - Don’t know / Prefer not to say

Podcasting

4. How often do you listen to podcasts? [Select one]
    - I listen to podcasts daily.
    - I listen to podcasts weekly.
    - I listen to podcasts monthly.
    - I used to listen to podcasts but haven’t listened to any for months.
    - I have never listened to podcasts. [Skip podcast questions (to Q14)]
5. How long do/did you typically spend listening to podcasts in one sitting? [Select one]
    - Less than 15 minutes

    - 15 - 29 minutes
    - 30 - 60 minutes
    - More than 60 minutes
    - Don't know / It varies
6. What podcast(s) are you currently listening to or used to listen to? [Short answer]
7. Do you mostly listen to podcasts for education/information or entertainment? [Select one]
    - Education / Information
    - Entertainment
    - Both
    - Neither
    - Don't know
8. What genre(s) of podcasts do you listen to or used to listen to? [Select all that apply]
    - Arts
    - Business and finance
    - Career and professional life
    - Comedy
    - Health and wellness
    - History
    - Leisure and lifestyle
    - News and politics
    - Religion and spirituality
    - Science and tech
    - Society and culture
    - Sports
    - Stories and audio dramas
    - True crime and investigative journalism
    - TV and film
    - Other [Allow text input]
9. Which of these podcast components motivate you to try a specific podcast? [Select all that apply]
    - None
    - In-episode ads
    - In-platform recommendations
    - Podcast content/topic
    - Podcast description
    - Podcast guest
    - Podcast host
    - Podcast publisher
    - Podcast thumbnail image
    - Podcast title
    - Podcast website
    - Other [Allow text input]
10. Which of these non-podcast components motivate you to try a specific podcast? [Select all that apply]

- None
- Celebrities, influencers, or personalities
- Outdoor advertising (i.e. billboard, bus advertising, poster, etc.)
- Social media
- TV and film
- Video ads
- Web advertising
- Word of mouth
- Other [Allow text input]

11. What platform(s) do you listen to or used to listen to podcasts on? [Select all that apply]
    - Amazon Music
    - Apple Podcasts
    - Audible
    - Google Podcasts
    - Spotify
    - Stitcher
    - Wondery
    - YouTube
    - Other [Allow text input]
12. How likely are you to use an additional podcast platform? [Select one]
    - Extremely unlikely
    - Somewhat unlikely
    - Neither likely nor unlikely
    - Somewhat likely
    - Extremely likely
13. Please rank these podcast platform features in terms of importance to you. [Likert scale: not at all important, slightly important, moderately important, very important, extremely important]
    - Ability to binge episodes
    - Ability to download episodes
    - Ease of use
    - Exclusive shows
    - High production value (i.e. sound quality, sound design, professionalism, etc.)
    - Large catalog
    - Personalized recommendations
    - Subscription price

Other media [Show the following message for non-podcast listeners only (Q4): Although you have never listened to podcasts, your opinions and perceptions of other types of media companies are valuable, too.] [Show the following message for all: The following questions aim to learn about your awareness of certain media companies. If you do not know any of the companies, select None / Don't know.]

14. Which of these media companies have you heard of? [Select all that apply]

- None
- All Things Comedy
- American Public Media
- Barstool Sports
- BBC
- Blaze Media
- CNN
- Crooked Media
- The Daily Wire
- Fox
- Gimlet Media
- iHeartMedia
- NBC
- The New York Times
- NPR
- Paramount
- PodcastOne
- PRX
- TED
- This American Life
- The Walt Disney Company
- WNYC Studios
- Wondery

15. Which of these media companies did you know publishes podcasts? [Select all that apply. Show for podcast listeners only (Q4).]
    - Same list of media companies as Q14 (+ None)
16. Which of these media companies have you listened to podcasts from? [Select all that apply. Show for podcast listeners only (Q4).]
    - Same list of media companies as Q14 (+ None / Don't know, Other)
17. Which of the following video on demand (VOD) services are you subscribed to? [Select all that apply]
    - None
    - Amazon Prime Video
    - Apple TV+
    - Crunchyroll
    - Disney+
    - HBO Max
    - Hulu
    - Netflix
    - Paramount+
    - Peacock
    - Other [Allow text input]
18. Do you mostly use VOD services for education/information or entertainment? [Select one]

   - Education / Information
   - Entertainment
   - Both
   - Neither
   - Not applicable / Don’t know
19. Which of the following music streaming services do you use? [Select all that apply]
   - None
   - Amazon Music
   - Apple Music
   - Spotify
   - SoundCloud
   - Tidal
   - YouTube Music
   - Other [Allow text input]
20. Which of the following social platforms do you use? [Select all that apply]
   - None
   - Facebook
   - Instagram
   - KakaoTalk
   - LinkedIn
   - Pinterest
   - Reddit
   - Snapchat
   - TikTok
   - Tumblr
   - Twitch
   - Twitter
   - WeChat
   - YouTube
   - Other [Allow text input]

Recruitment for qualitative research

21. Please provide your email address if you are open to being contacted for a follow-up interview. [Short answer.] [Show for podcast listeners only (Q4).]

Conclusion: We thank you for your time spent taking this survey. Your response has been recorded.

Qualitative research: IDI moderator guide

Opening

- Thank you for joining us today!
- Where are you from and what are you studying?
- What do you like to do in your free time?
- What kind of podcasts do you listen to?

Introduction

- We're working with a podcast publisher to help them learn more about Gen Z and podcasting, and how they can better reach Gen Z podcast listeners. You were selected because we believe that you can help us with quality insights for this research.
- We will be recording the meeting and taking notes. Names will be anonymized. Results will only be shared within the class and to the client.
- First, we will ask some questions related to your podcast listening habits, then get your perspective on the idea of "premium" podcasting, and finally talk about a few podcasting brands. There are no right or wrong answers. We're interested in your opinions, what you know, and what you don't know. Please don't hesitate to ask for clarifications.

Transition

- As we move into our key questions, think about the podcasts you currently listen to and what kind of podcasts they are – i.e. true crime, narrative storytelling, casual/chatty, news, educational, hobby, etc. – but also feel free to speak about your experience more generally.

Key questions

- Current impressions/behavior in podcasting
  - How often do you listen to podcasts?
  - What is your favorite podcast, or what's one you listen to a lot?
  - How did you find out about it, and what do you like about it? What's your process for trying out a new podcast?
  - Have you or would you consider turning to podcasts as a way to learn more about your interests?
  - When will you opt for a podcast over listening to or watching something else?
  - What would improve your podcast listening experience?
- "Premium" podcast brainstorming
  - What does a "premium" podcast experience mean to you? What would you expect from a "premium" podcast experience?
  - How willing are you to pay a subscription for a "premium" podcast experience? What would it take to persuade you to pay a subscription?

    - How willing are you to try a new podcast listening platform? What would it take to persuade you to try another podcast listening platform?
- Podcast brands and Wondery deep dive
    - Do you ever notice who publishes the podcasts you listen to?
        - [For clarification if needed] A podcast publisher is the owner of the podcast content. It's different from the podcast host or podcast listening platform.
            - i.e. The *Stuff You Should Know* podcast is hosted by Josh Clark and Chuck Bryant, and published by iHeartRadio. You can listen to it on platforms like Apple Podcasts or Spotify.
    - Activity #1: Impression of various media companies/podcast publishers
        - Have you heard of these companies? [Select a few companies based on the companies they know from quantitative survey responses, top podcast publishers (Podtrac, 2022), tech companies, + Amazon and Wondery.]
        - What is your impression of these companies (in general, not podcast-specific)? Do they differ? "No impression" is also a valid impression. What kind of content would you expect from them?
        - Amazon follow-up
            - What Amazon products and services do you use? i.e. Amazon Prime, Amazon Prime Video, Amazon Fresh, Amazon Music, Alexa, Twitch, IMDB, GoodReads, Ring, Whole Foods
            - If negative sentiment: Knowing that Wondery is an Amazon company, would that deter you from trying a Wondery podcast?
            - If positive or neutral sentiment: Some people have negative impressions of Amazon, particularly with their ethics and morals. Have you heard of that opinion before? If so, do you have any particular stance or thoughts on that?
    - Activity #2: Explore Wondery website
        - Are there any podcasts that catch your eye? Please share aloud your decision-making process/considerations you're making.
        - What's your impression of Wondery based on that interactive experience?

Ending/AOB

- Summarize and get confirmation on:
    - Current impressions/behavior in podcasting
    - What makes a "premium" podcast listening experience
    - Impression of some podcast publishers
        - Strong/weak impression of Wondery
- Any final questions or comments?
- Thank you again for your time!

Content analysis

130 podcasts – collected from responses to Q6 of the quantitative survey (“What podcast(s) are you currently listening to or used to listen to?”) – were coded for publishers. The podcasts include:

2 Johnnies, 30 Minutes with the Perry's, 99% Invisible, 99.94dm, Against Japanism, Alioli, Amies, An Unexpected Podcast, Anything Goes by Emma Chamberlain, Acquired, Are You Scared?, Armchair Expert, Baking a Mystery, Beautiful Anonymous, Business Wars, Call Her Daddy, Clean Coders with Uncle Bob Martin, Comments by Celebs, Cost to Company, Crime Junkie, Cult of Pedagogy, Cultish, De Rudi en Freddie Show, Dear Hank and John, Depths of Wikipedia, Desiring God, Diary of a CEO, Ecosofie, Every Little Thing, Fantasy Footballers, For the Gospel, Freakonomics Radio, Frenemies, Friends Not Fans, Happy and Healthy, Hardcore History, Hello Internet, Huberman Lab, Infatuated, Internet Said So, It’s Me Tinx, Jenna and Julien, Joe Rogan Experience, Kat and Sid, Keep It, Krystal Kyle and Friends, Lemon Radio, Let’s Talk About Myth’s Baby!, Lex Fridman, Locked On Auburn, Lore, Loud Murmurs, Megaten Marathon, Misfits, Morbid, More Perfect, MusicalSplaining, New Deal, Norah Jones is Playing Along, NPR News, NPR Up First, Off Menu, Off the Pill, Ologies with Alie Ward, On Purpose, Oprah Super Soul, Overheard at National Geographic, Philosophize This, Planet Money, Poems to Calm Down To, Queer as Fact, Rabbit Hole, Radiolab, Relax the Podcast, Renewing Your Mind, Pretty Basic, Romance of the Three Kingdoms, Rotten Mango, Save As: NextGen Heritage Conservation, Scamfluencers, Screaming Meals, The Kyle Kulinski Show, Simple Flying, Smashing Security, Sounds Like Hate, Star Talk, Steve说, Stochastic Volatility, Stories from the Bunker, Stuff You Should Know, Suburb Talks, Summoning Insight, Supermegacast, The Anthropocene Reviewed, The Athletic Football Podcast, The BFF Podcast, The Cosmic Skeptic, The Daily, The Dive, The Divine Introspect, The Indicator, The Jordan Theresa Podcast, The Journal, The Kannada Gothilla Podcast, The Kindness Podcast, The No Sleep Podcast, The Real Life Actor, The Run Up, The Sleepy Bookshelf, The Thrilling Adventure Hour, The Women’s War, This Might Get Weird, Til Death Do Us Blart, Tiny Meat Gang, TJ Kirk, Tony Robbins, Trash Taste, Unfiltered, Very Really Good, Kurtis Connor, Virtual Book Tour, Wall Street Journal, Wan Show, Watcher Weekly, Waveform, Welcome to Night Vale, Where Do We Begin, Wild Til 9, Your Angry Neighborhood Feminist, Your Morning Coffee, 海马星球 (Seahorse Planet).

Appendix C

Results summary

Secondary research

Wondery specializes in narrative-driven shows, emphasizing storytelling and a premium experience with high production value comparable to film and television, differentiating itself from public radio and other types of podcasts like interviews and conversational podcasts (Lin, 2019; Locker, 2019; Santo, 2021; Wondery, n.d.). The premium experience with storytelling and high production value means that Wondery's shows are particularly suitable for the podcast-to-TV pipeline, which brings television's profitability to podcasting (Dams, 2022; Lin, 2019; Locker, 2019). As a former television executive, Wondery founder Hernan Lopez identified a gap in the podcasting industry for Wondery to fill, envisioning the potential of premium podcasting. Additionally, his cross-industry knowledge put Wondery in a unique position to leverage connections with movie and television buyers and agents, and understand network executive and producer interests (Locker, 2019).

Wondery was founded in 2016, launched their Wondery+ subscription service in 2019, the Wondery app in 2020 (Spangler, 2020), was acquired by Amazon Music in late 2020 (Amazon Music Team, 2020), launched their Wondery+ Kids subscription service in 2021 (Chan, 2021), and began a partnership with Gen Z Media in 2021 (White, 2021). The Wondery app drives Wondery+ subscriptions – which offer ad-free listening, "binges" (autoplay), and exclusive/early access to shows – and aims to provide an experience more like movie streaming services with personalization and bingeability – i.e. Netflix, Hulu – than that of traditional podcasting apps (Spangler, 2020).

Of the top podcast publishers in the US (Podtrac, 2022), Wondery is distinguished for their storytelling (Podyssey, n.d.). Another prominent podcast publisher in the media known for their narrative-driven content is Gimlet Media, which was acquired by Spotify in 2019. As tech companies begin to heavily invest in podcasting (Amazon Music Team, 2020; Bracci, 2022; Dang, 2021; Gerzon, 2022; Levy, 2022; Silberling, 2022; Williams, 2021), some are calling it the era of "Big Podcasting" (Quah, 2019). Tech companies are recognizing the opportunity to expand their media empires – such as through the podcast-to-TV pipeline (Dams, 2022; Lin, 2019; Locker, 2019) – and of course the opportunity for advertising (Adgate, 2021; Cameron, 2021).

Quantitative research: Survey

The online Qualtrics survey used a convenience sample and was distributed through personal contacts and various university message boards, though primarily universities in California. The survey received 151 responses total. Only survey responses that were completed from beginning to end by 18-25 year olds from unique IP addresses were kept, leaving 106 valid responses for analysis. The demographics of the sample skewed toward the older end of Gen

Z, and there were slightly more female respondents than male respondents. Data on household income was also collected but did not reveal any notable insights when segmented.

Valid survey respondents included 85 podcast listeners who varied in podcast listening frequency, and 4 of which were Wondery listeners. Amongst podcast listeners, the top motivating factors for trying out a podcast were podcast content/topic and podcast hosts, whereas podcast publishers ranked toward the bottom. The most important platform features for podcast listeners were ease of use and subscription price, whereas exclusive shows ranked toward the bottom.

The usage of podcast listening platforms and music streaming platforms were very similar, with both showing Spotify as the leading platform by a wide margin, followed by YouTube, Apple, then Amazon. While Amazon was not as popular as the other three platforms for podcasting and music, it ranks second for VOD services after Netflix.

Qualitative research: IDI

8 IDIs were conducted with podcast listeners using a convenience sample. Interviewees were selected from personal contacts and survey respondents who opted to be contacted for follow-up interviews. In order to build rapport, the moderator for each IDI was selected based on the researcher who was most familiar with the interviewee. 7 interviews were conducted over Zoom and 1 was conducted in person. Of the 8 interviewees, 1 was a Wondery listener.

The interviewees were 19-25 year old undergraduate and graduate students, including 5 males and 3 females. They primarily listen to informative podcasts and see podcasts as a tool to learn about academic and non-academic topics that they do not get the chance to study in school or to keep up with current events, but 3 of them also listen to some entertaining podcasts related to music, video games, and true crime. The Wondery listener was the only one who listened to podcasts that had an atmospheric quality, but he found that ads negated the immersive experience; the other interviewees mostly listened to more casual and conversational podcasts.

None of the interviewees spend money listening to podcasts, and all of them feel strongly about not spending money on podcasting. They are satisfied with what is available for free, though one speculated that he could be tempted to pay for a premium experience to go ad-free. Opinions about ads varied between interviewees. Some shared the same sentiment as the one prior, some were open to listening to ads in order to support podcast creators without having to spend their own money, and some were opposed to ads and would go as far as to skip them manually.

Besides not spending money on podcasts, another shared characteristic amongst the interviewees was that they did not have strong impressions of podcast publishers in general. After exploring the topic for a few minutes, one interviewee recalled that he did listen to a few podcasts from the same publisher, which he discovered through in-episode ad reads and cross-posted episodes between podcasts from the same publisher. This was during the early phases of his podcasting experience, when he was actively searching for new podcasts to subscribe to. However, most of the interviewees do not actively seek new podcasts to listen and subscribe to, and one of them does not seek to subscribe to podcasts at all. Instead, he prefers to search up individual podcast episodes from various podcasts on specific topics of interest.

In general, interviewees felt neutral about Amazon, though one had an extremely negative impression of Amazon.

Content analysis

130 podcasts were collected based on 63 responses to a short answer question on the quantitative survey asking, “What podcast(s) are you currently listening to or used to listen to?” then coded for podcast publishers. The content analysis yielded 106 unique podcast publishers and 6 loyal listeners.

The top podcast publishers by unique listeners were Studio 71 with 9 unique listeners and 3 unique podcasts, The New York Times with 7 unique listeners and 3 unique podcasts, NPR with 5 unique listeners and 4 unique podcasts, Joe Rogan with 4 unique listeners and 1 unique podcast, and Audiochuck and Nick Grajeda with 3 unique listeners and 1 unique podcast each. Wondery came in next, tied with 15 other podcast publishers with 2 unique listeners each; Wondery had 3 unique podcasts. The other 84 podcast publishers had 1 unique listener each.

Notably, Wondery is one of the most consistently branded podcast publishers, making Wondery podcasts very easy to identify: the Wondery name is consistently displayed in podcast thumbnails and podcast episode descriptions, and the Wondery jingle consistently plays in the podcast intro. In comparison, personality-based podcasts were more difficult to identify, as it was sometimes unclear whether the podcast was self-published or not.

Appendix D

Raw data

Attached to the report are one CSV containing the quantitative survey results, seven recorded IDIs and notes from one unrecorded IDI, and one CSV containing the content analysis coding sheet. They are also accessible through the following links:

- Quantitative survey results
- Qualitative IDI recordings and notes
- Content analysis coding sheet

Appendix E

Tables and figures

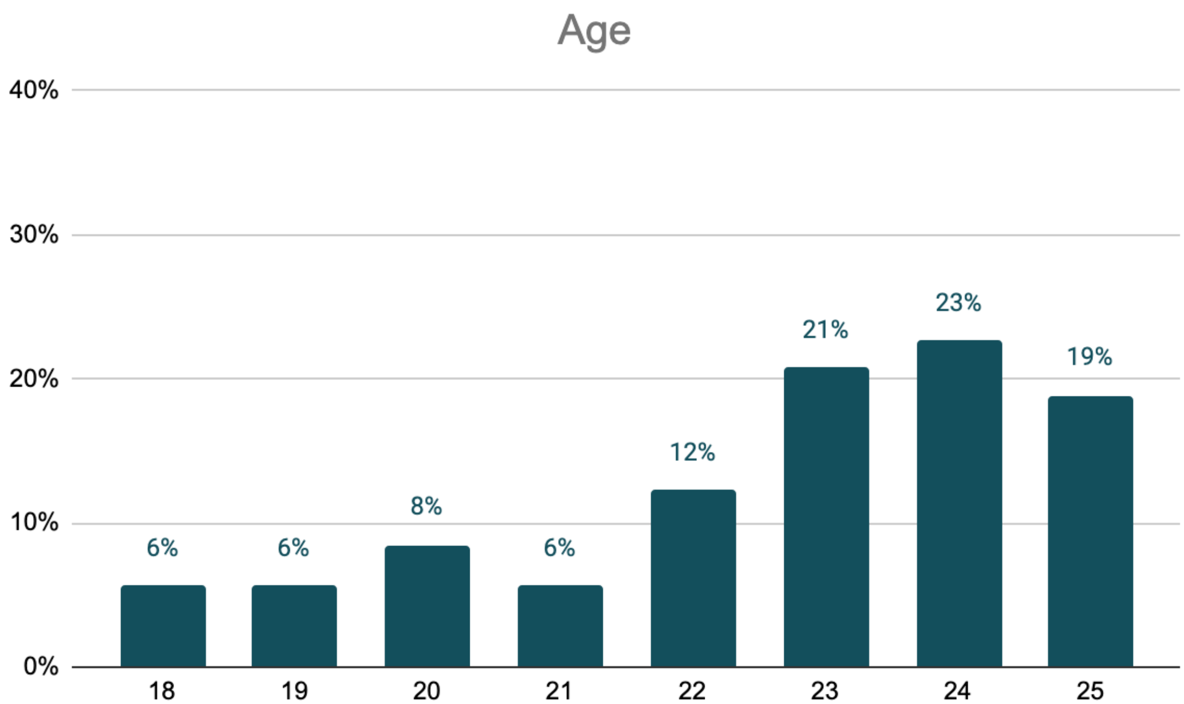

Figure 1. *Age demographics of all valid survey responses*. 106 survey responses to: “How old are you?” Short answer.

	Count	**Percentage**
18	6	6%
19	6	6%
20	9	8%
21	6	6%
22	13	12%
23	22	21%
24	24	23%
25	20	19%

Table 1. *Age demographics of all valid survey responses*. 106 survey responses to: “How old are you?” Short answer.

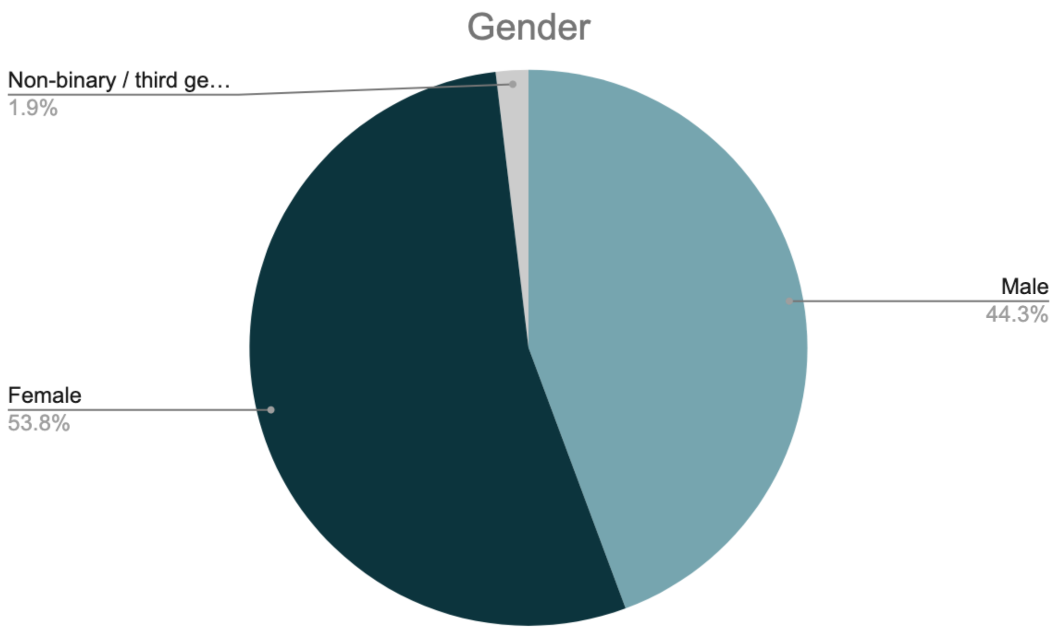

Figure 2. *Gender demographics of all valid survey responses*. 106 survey responses to: "What is your gender?" Select one.

	Count	**Percentage**
Male	47	44%
Female	57	54%
Non-binary / third gender	2	2%

Table 2. *Gender demographics of all valid survey responses*. 106 survey responses to: "What is your gender?" Select one.

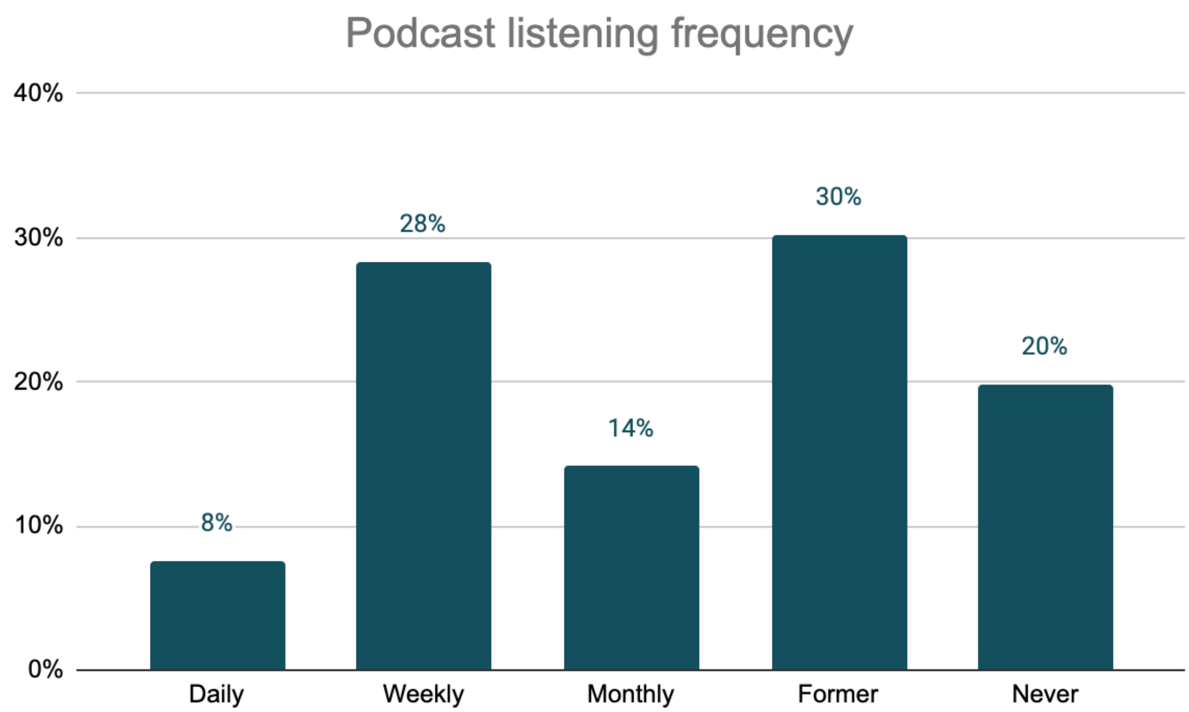

Figure 3. *Podcast listening frequency of all valid survey responses*. 106 survey respondents to: "How often do you listen to podcasts?" Select one. "Former" podcast listeners are those who selected "I used to listen to podcasts but haven't listened to podcasts in months" in the survey.

	Count	**Percentage**
Daily	8	8%
Weekly	30	28%
Monthly	15	14%
Former	32	30%
Never	21	20%

Table 3. *Podcast listening frequency of all valid survey responses*. 106 survey responses to: "How often do you listen to podcasts?" Select one.

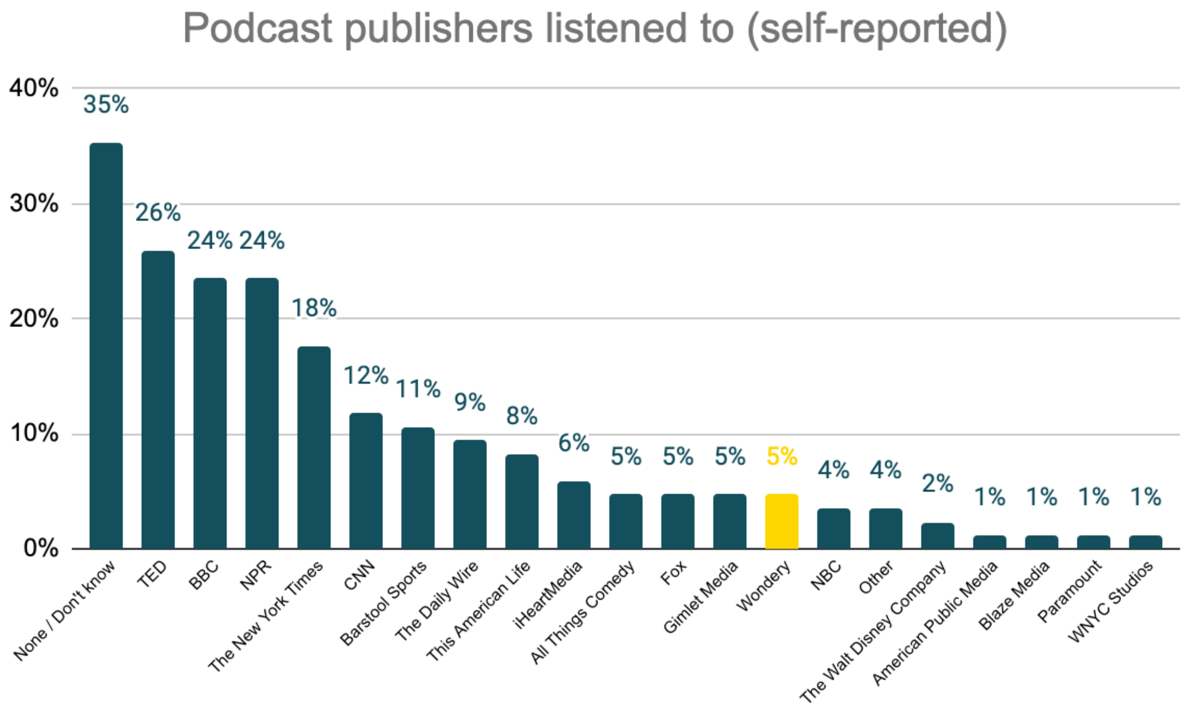

Figure 4. *Podcast publishers listened to (self-reported)*. 85 survey responses to: "Which of these media companies have you listened to podcasts from?" Select all that apply.

	Count	**Percentage**
None / Don't know	30	35%
TED	22	35%
BBC	20	24%
NPR	20	24%
The New York Times	15	18%
CNN	10	12%
Barstool Sports	9	11%
The Daily Wire	8	9%
This American Life	7	8%
iHeartMedia	5	6%
All Things Comedy	4	5%
Fox	4	5%
Gimlet Media	4	5%
Wondery	4	5%
NBC	3	4%
Other	3	4%
The Walt Disney Company	2	2%
American Public Media	1	1%
Blaze Media	1	1%
Paramount	1	1%
WNYC Studios	1	1%
Crooked Media	0	0%
PodcastOne	0	0%
PRX	0	0%

Table 4. *Podcast publishers listened to (self-reported)*. 85 survey responses to: "Which of these media companies have you listened to podcasts from?" Select all that apply.

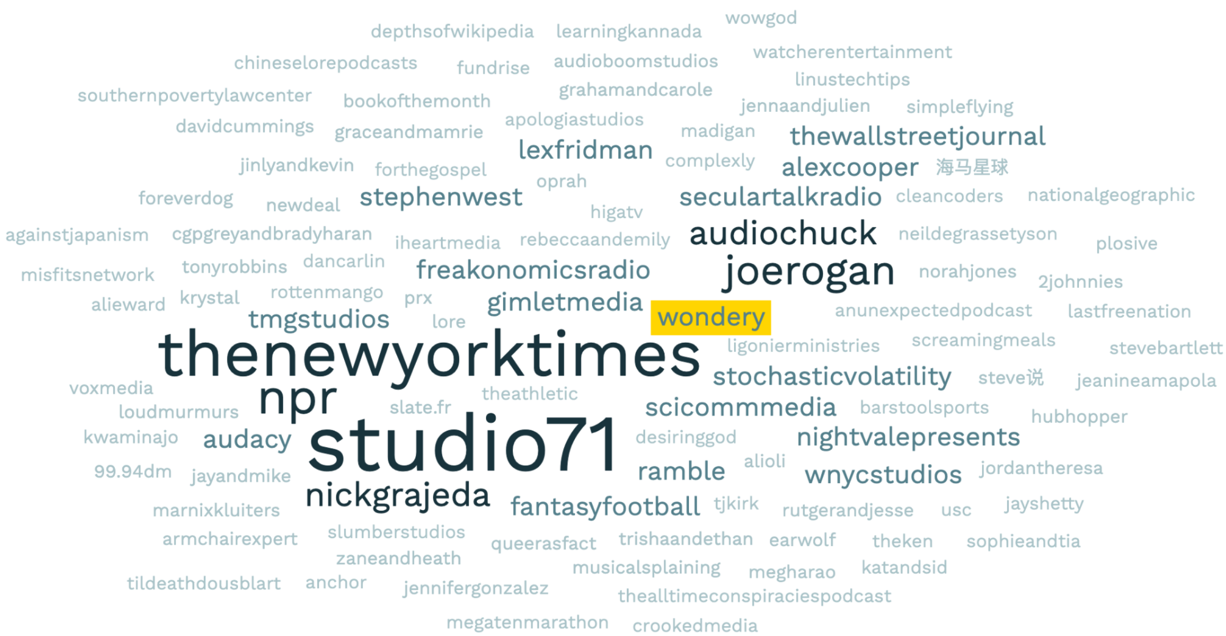

Figure 5. *Podcast publishers listened to (content analysis)*. Content analysis on 63 survey responses to: “What podcasts are you currently listening to or used to listen to?” Short answer.

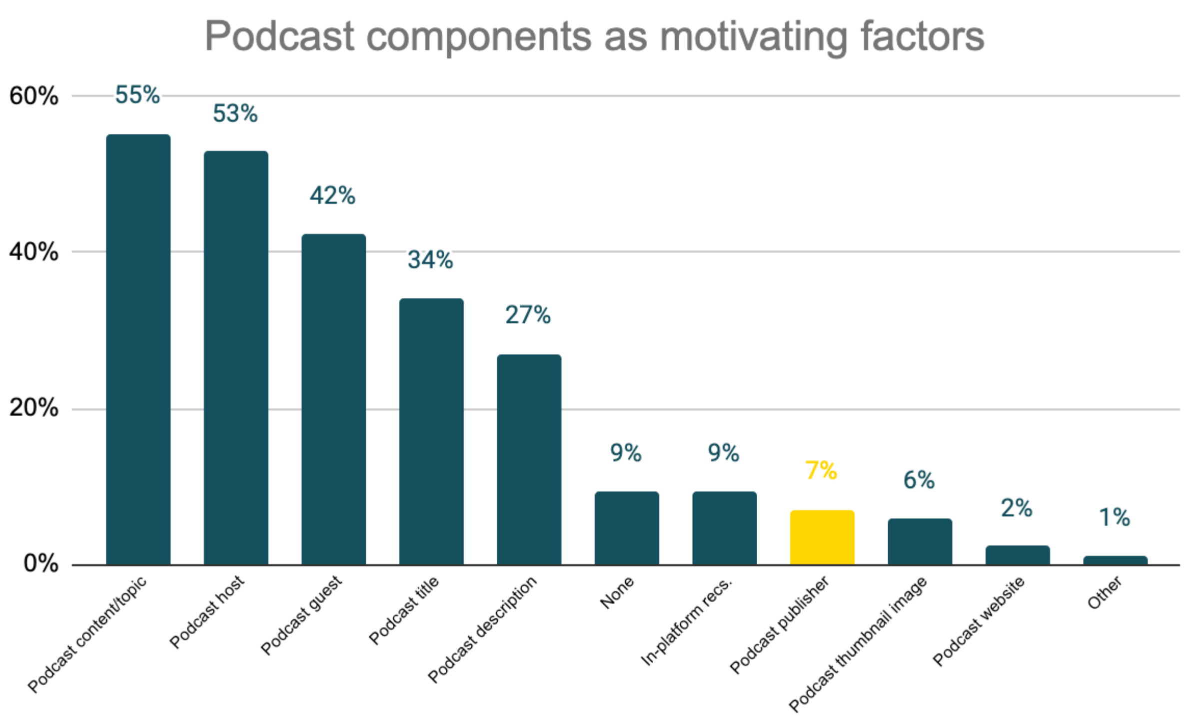

Figure 6. *Podcast components as motivating factors*. 85 survey responses to: “Which of these podcast components motivate you to try a specific podcast?” Select all that apply.

	Count	**Percentage**
Podcast content/topic	47	55%
Podcast host	45	53%
Podcast guest	36	42%
Podcast title	29	34%
Podcast description	23	27%
None	8	9%
In-platform recommendations	8	9%
Podcast publisher	6	7%
Podcast thumbnail image	5	6%
Podcast website	2	2%
Other	1	1%
In-episode ads	0	0%

Table 5. *Podcast components as motivating factors*. 85 survey responses to: “Which of these podcast components motivate you to try a specific podcast?” Select all that apply.

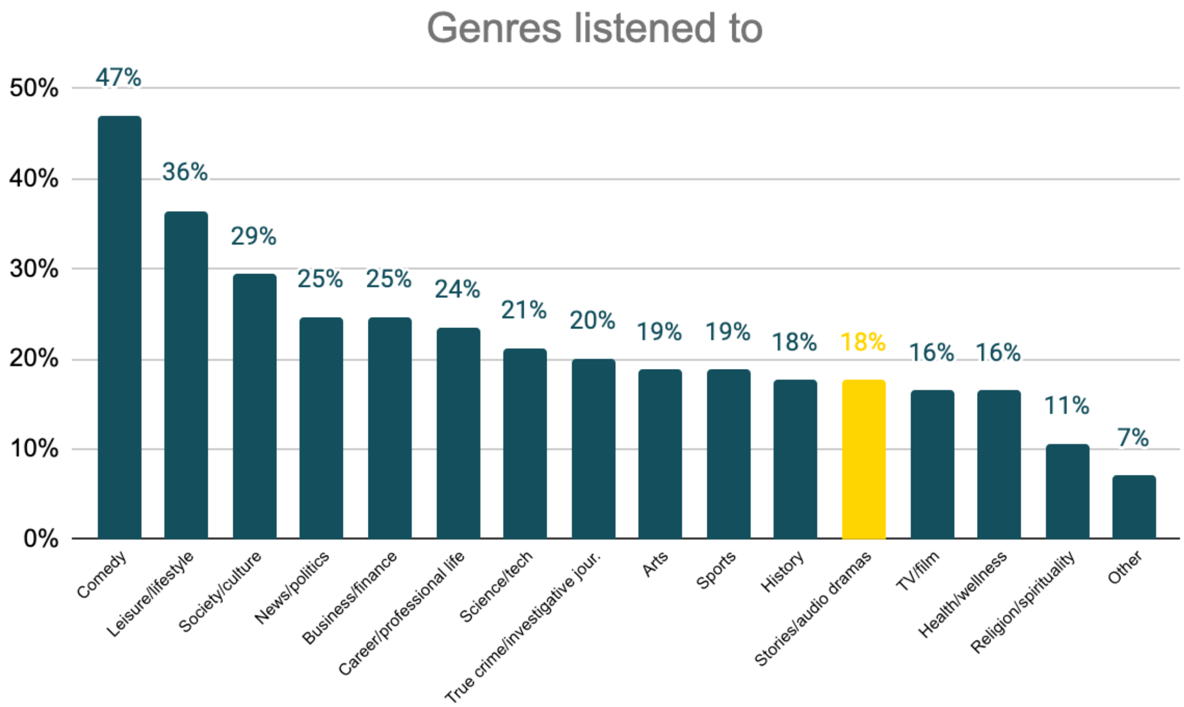

Figure 7. *Genres listened to*. 85 survey responses to: “What genre(s) of podcasts do you listen to or used to listen to?” Select all that apply.

	Count	Percentage
Comedy	40	47%
Leisure/lifestyle	31	36%
Society/culture	25	29%
News/politics	21	25%
Business/finance	21	25%
Career/professional life	20	24%
Science/tech	18	21%
True crime/investigative journalism	17	20%
Arts	16	19%
Sports	16	19%
History	15	18%
Stories/audio dramas	15	18%
TV/film	14	16%
Health/wellness	14	16%
Religion/spirituality	9	11%
Other	6	7%

Table 6. *Genres listened to*. 85 survey responses to: "What genre(s) of podcasts do you listen to or used to listen to?" Select all that apply.

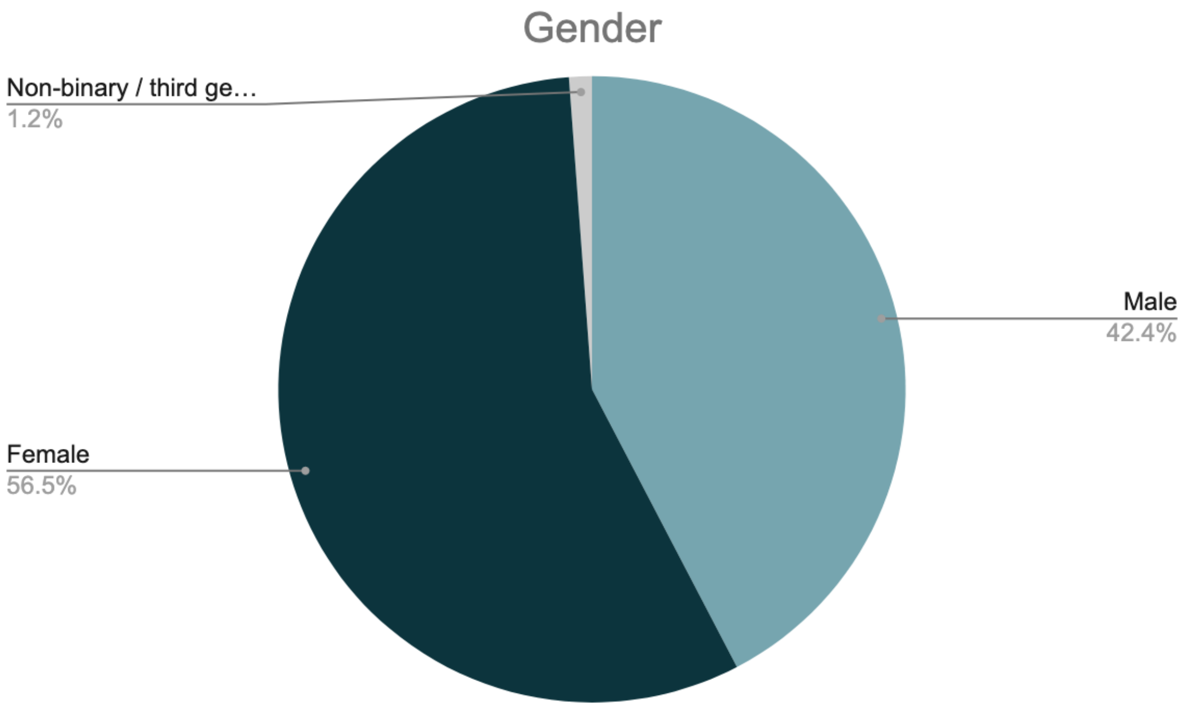

Figure 8. *Gender of all podcast listeners*. 85 survey responses to: “What is your gender?” Select one.

	Count	**Percentage**
Male	36	42%
Female	48	56%
Non-binary / third gender	1	1%

Table 7. *Gender of all podcast listeners*. 85 survey responses to: “What is your gender?” Select one.

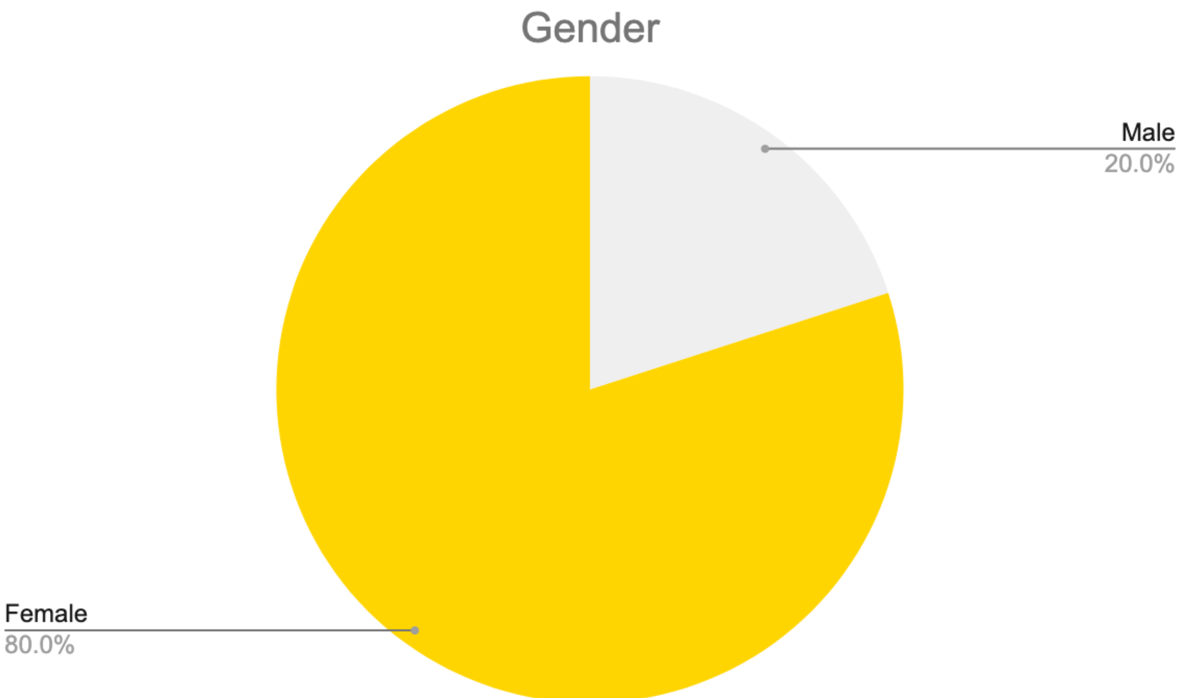

Figure 9. *Gender of story/audio drama listeners*. 15 survey responses to: “What is your gender?” Select one.

	Count	**Percentage**
Male	3	20%
Female	12	80%
Non-binary / third gender	0	0%

Table 8. *Gender of story/audio drama listeners*. 15 survey responses to: “What is your gender?” Select one.

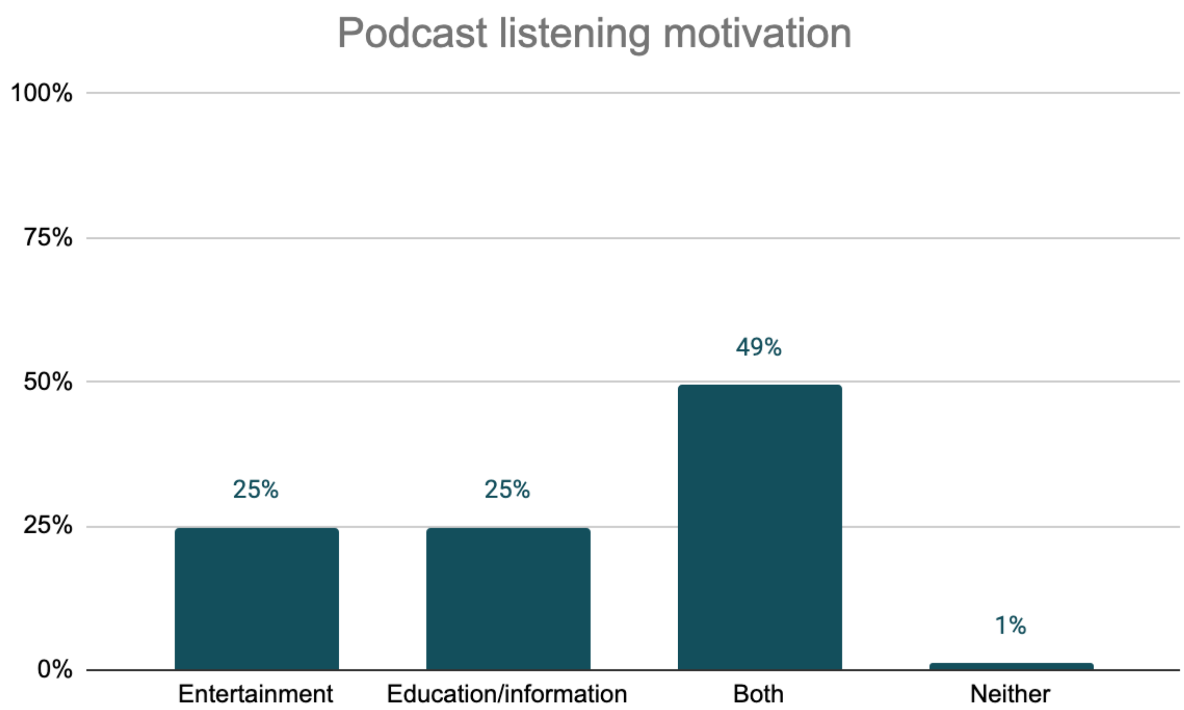

Figure 10. *Podcast listening motivation for all podcast listeners*. 85 survey responses to: "Do you mostly listen to podcasts for education/information or entertainment?" Select one.

	Count	**Percentage**
Entertainment	21	25%
Education/information	21	25%
Both	42	49%
Neither	1	1%

Table 9. *Podcast listening motivation for all podcast listeners*. 85 survey responses to: "Do you mostly listen to podcasts for education/information or entertainment?" Select one.

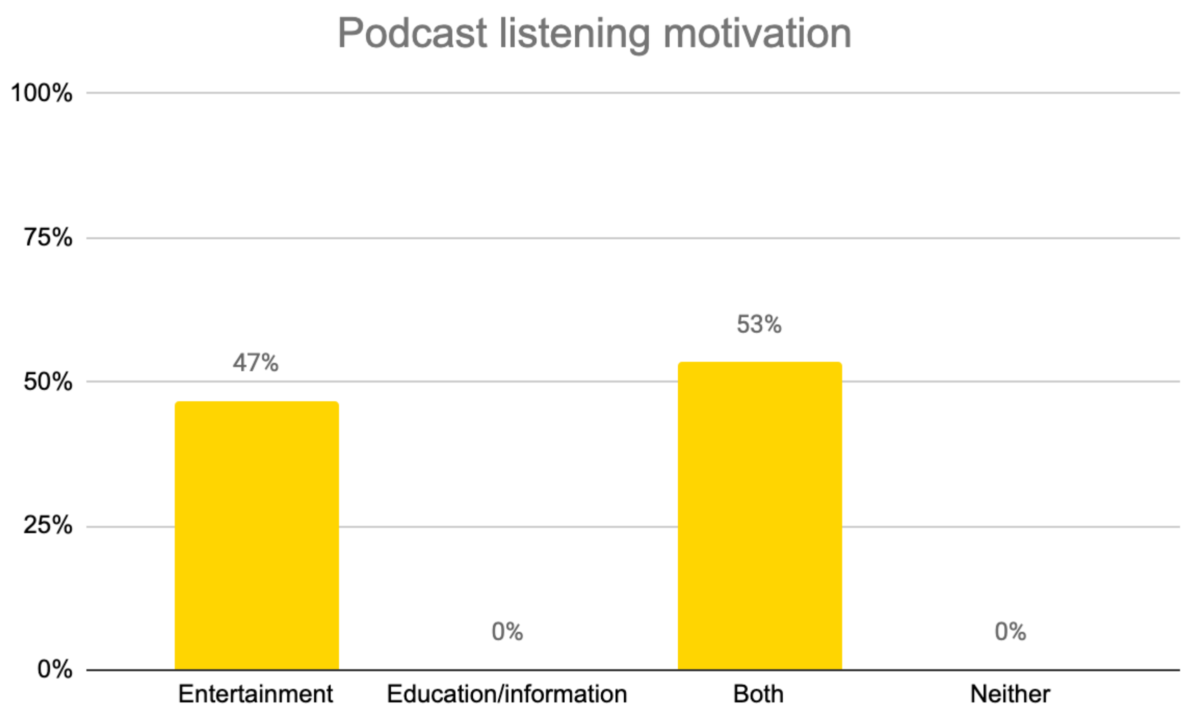

Figure 11. *Podcast listening motivation for story/audio drama listeners*. 15 survey responses to: "Do you mostly listen to podcasts for education/information or entertainment?" Select one.

	Count	**Percentage**
Entertainment	7	47%
Education/information	0	0%
Both	8	53%
Neither	0	0%

Table 10. *Podcast listening motivation for story/audio drama listeners*. 15 survey responses to: "Do you mostly listen to podcasts for education/information or entertainment?" Select one.

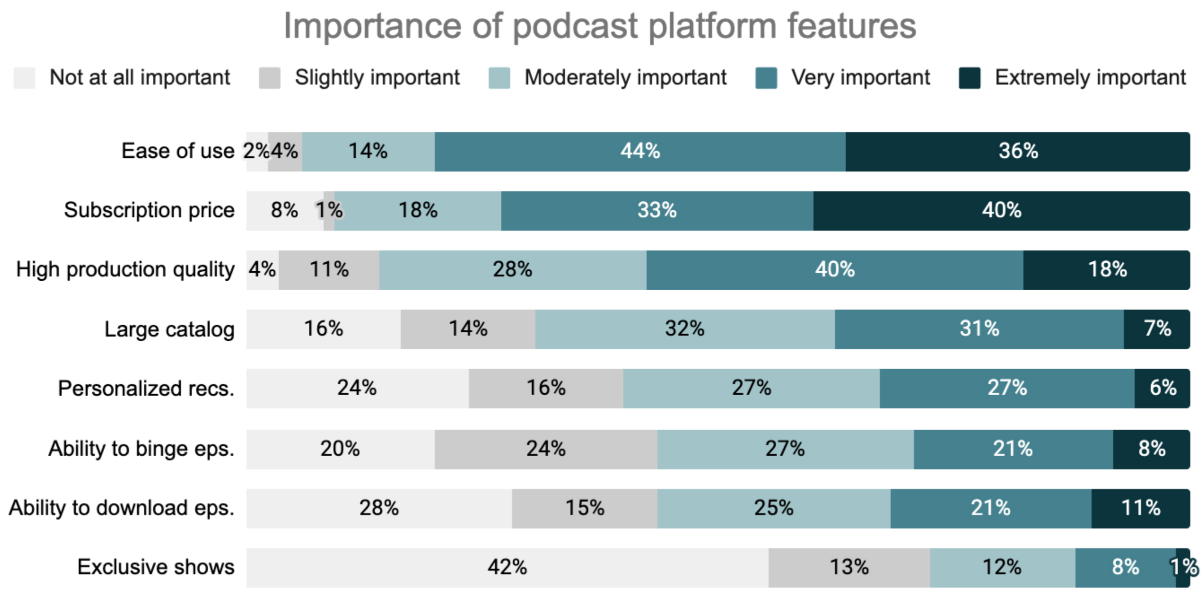

Figure 12. *Importance of podcast platform features*. 85 survey responses to: "Please rank these podcast platform features in terms of importance to you." Likert scale.

	Not at all important	**Slightly important**	**Moderately important**	**Very important**	**Extremely important**
Ease of use	2	3	12	37	31
Subscription price	7	1	15	28	34
High production quality	3	9	24	34	15
Large catalog	14	12	27	26	6
Personalized recommendations	20	14	23	23	5
Ability to binge episodes	17	20	23	18	7
Ability to download episodes	24	13	21	18	9
Exclusive shows	36	11	10	7	1

Table 11. *Importance of podcast platform features*. 85 survey responses to: "Please rank these podcast platform features in terms of importance to you." Likert scale.

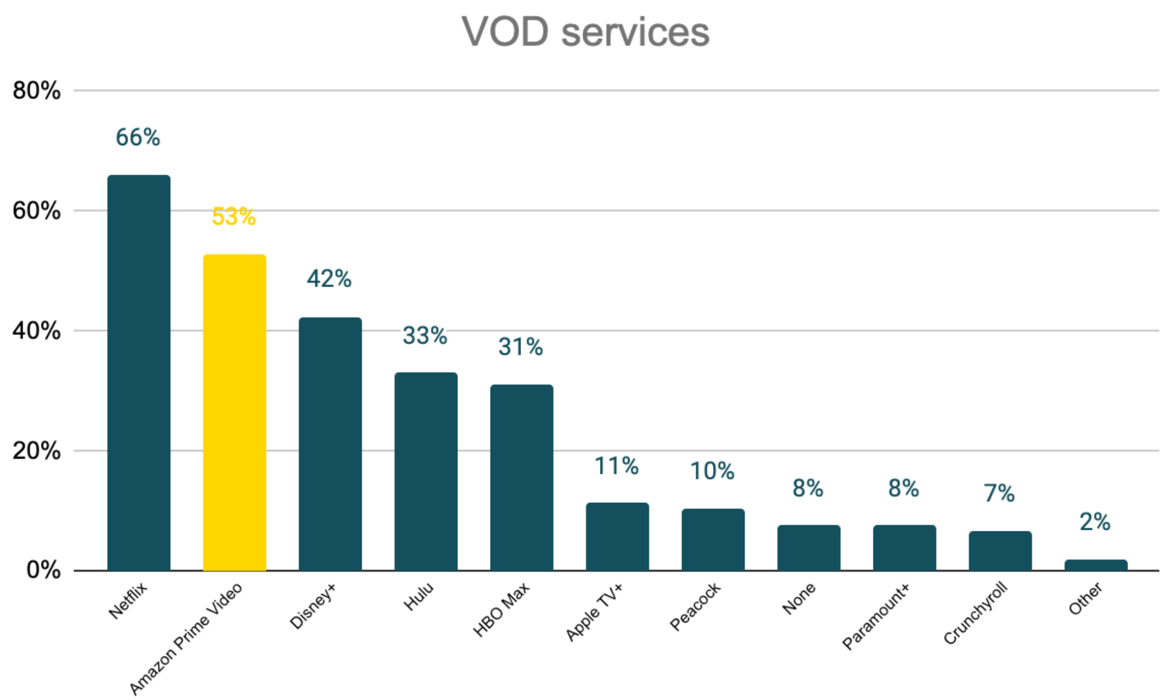

Figure 13. *Usage of VOD services*. 106 responses to: "Which of the following video on demand (VOD) services are you subscribed to?" Select all that apply.

	Count	**Percentage**
Netflix	70	66%
Amazon Prime Video	56	53%
Disney+	45	42%
Hulu	35	33%
HBO Max	33	31%
Apple TV+	12	11%
Peacock	11	10%
None	8	8%
Paramount+	8	8%
Crunchyroll	7	7%
Other	2	2%

Table 12. *Usage of VOD services*. 106 responses to: "Which of the following video on demand (VOD) services are you subscribed to?" Select all that apply.

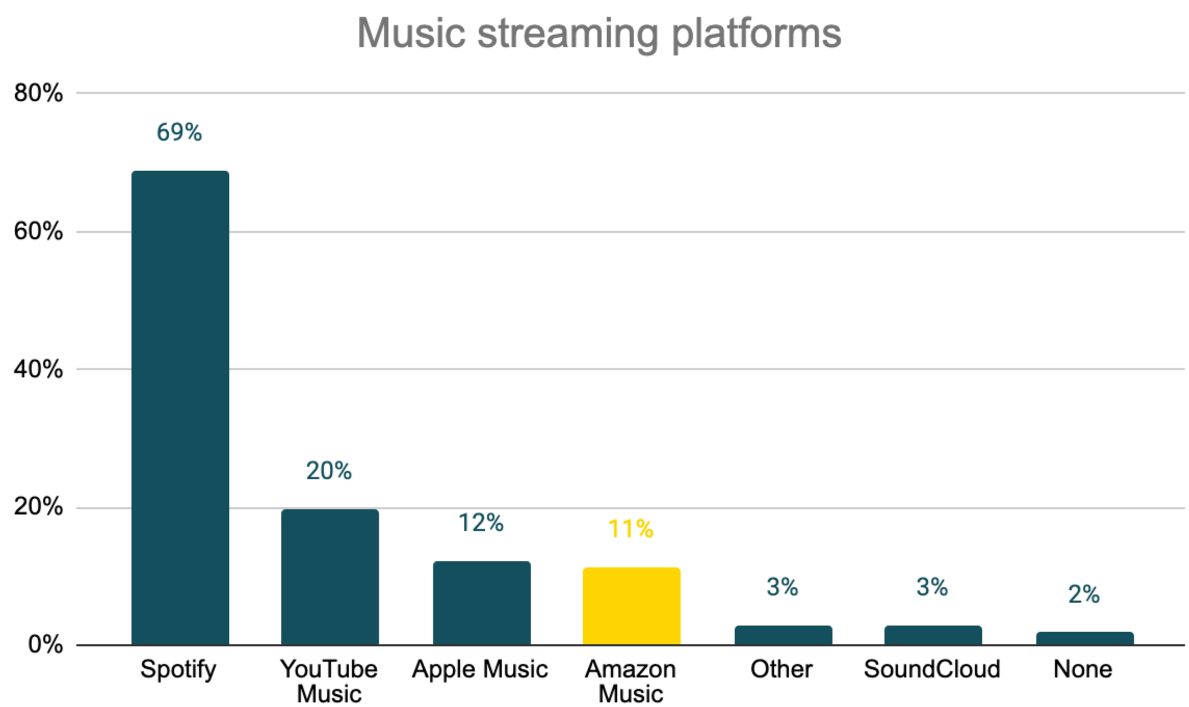

Figure 14. *Usage of music streaming platforms*. 106 responses to: “Which of the following music streaming services do you use?” Select all that apply.

	Count	**Percentage**
Spotify	73	69%
YouTube Music	21	20%
Apple Music	13	12%
Amazon Music	12	11%
Other	3	3%
SoundCloud	3	3%
None	2	2%

Table 13. *Usage of music streaming platforms*. 106 responses to: “Which of the following music streaming services do you use?” Select all that apply.

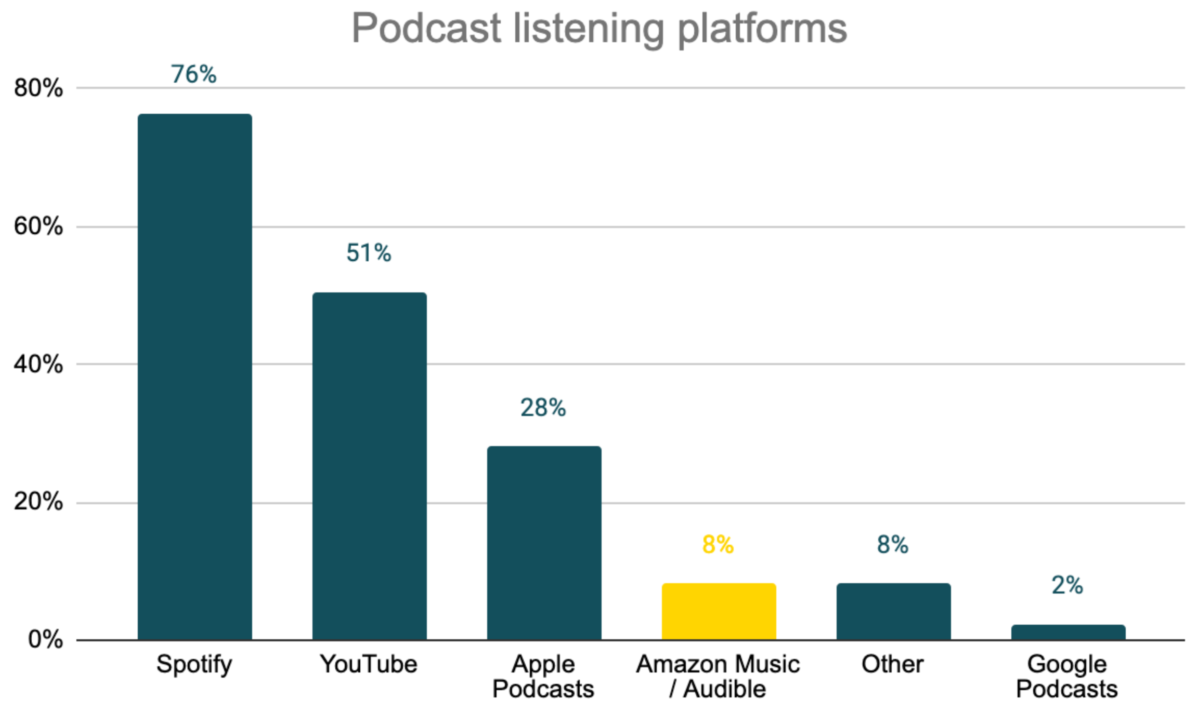

Figure 15. *Usage of podcast listening platforms*. 85 responses to: “What platform(s) do you listen to or used to listen to podcasts on?” Select all that apply.

	Count	**Percentage**
Spotify	65	76%
YouTube	43	51%
Apple Podcasts	24	28%
Amazon Music / Audible	7	8%
Other	7	8%
Google Podcasts	2	2%

Table 14. *Usage of podcast listening platforms*. 85 responses to: “What platform(s) do you listen to or used to listen to podcasts on?” Select all that apply.