2020 Survey: A Look at Chinese Podcast Listeners



PODFESTCHINA.COM

THE DEFINITION: CHINESE PODCASTS

POD



BROADCASTING



PODCASTING

We define Chinese Podcasts as podcasts in Chinese.

The term "Podcast" is derived from "iPod" and "broadcast", referring to a wide range of audio programs that are downloadable or accessible via RSS feeds over the Internet. In China, "Podcast" is commonly known as 播客 (Bo-Ke).

Amid the rapid development of China's mobile internet industry, Chinese podcasting has been receiving an increasing amount of attention among mobile users for its abundant and diversified content offerings. It has been considered an innovative way of information consumption that celebrates all sorts of personalities in a country home to 1.4 billion people.

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THREE Content Consumption Behavior

FOUR Commercialization and Monetization

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BACKGROUND AND KEY FIGURES

The year 2019 has witnessed Chinese podcasting evolving in a number of unprecedented ways: content offerings became diversified; production houses emerged and entered the space with skilled professionals; podcast monetization got tested—all factors that anchored our theme of the 2019 PodFest China: "Chinese Podcasting Takes Off!"

With no doubt, Chinese podcasting has been gradually integrated into China's large media ecosystem. The vast amount of content produced by production houses, traditional media outlets, influencers and amateurs are quickly filling up listeners' needs and enriching their choices. In 2020 and 2021, we expect even more advancements to arrive, as more premium content providers emerge, needs for content as a marketing solution increase, and more investment money join the game. With all these opportunities, we see the potential of podcasting to thrive and stand out from the crowded content space.

BACKGROUND

Our survey was conducted in March 2020 through online questionnaire, distributed via podcast fan WeChat groups, WeChat official accounts, Weibo, Telegram and other online platforms.

- 2. Only listeners who have listened to podcasts at least once in the past half year were eligible to participate. Listeners of a variety of podcast programs have been invited in order for the study to be comprehensive and unbiased.
- 3. With invalid survey submissions removed, a total of **977** valid questionnaires have been successfully collected.

RESEARCH OVERVIEW



JustPod



Sheng FM



Story FM



Midnightalks



DAO Podcast



Bowuzhi /Muséelogue



Anyway FM



Fun Factory Talk



The Steve Shi Experience



The Unemployable



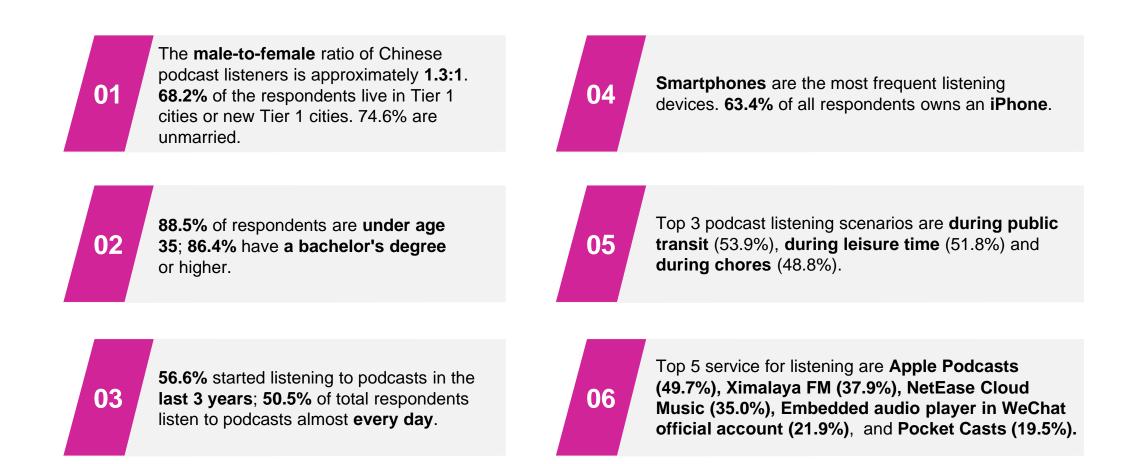
Himalaya



Qingmang

In addition, PodFest China thanks Xiaoyuzhou app, Ellen, Guo Qingbin, "Independent Podcast" and Sulami, for their great support for the survey.

PARTNERSHIP



KEY FIGURES

80

09

72.6% of respondents use directory-based podcast players/apps to listen to Chinese podcasts. 58.4% use China-based audio content platforms.

77.6% of respondents showed interest in researching for subject matters mentioned in the show they listen to. 75.6% have shared shows to friends.

Respondents listen to podcasts primarily to fulfill curiosity, general interest and gain practical knowledge. 33.3% of respondents have cultivated a fan state of mind towards hosts or guests.

70.2% of respondents said they are spending less time on music, audiobooks, "Pay for Knowledge" and other audio content since they began listening to podcasts.

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Among all forms of podcast commercials, respondents are mostly like to embrace **preroll and post-roll ads (51.6%)**, followed up by **long-term brand/title sponsorships (50.5%).**

87.8% of respondents said they **don't have** aversion to podcast commercials. **88.5%** have paid for online content at least once.

KEY FIGURES

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Respondents discover new shows primarily through **podcast players/apps**, **search engines and social media**. **Endorsement from hosts**, **guests and specialized KOLs** have a considerable impact on listening choices, scoring 7 out of 10.

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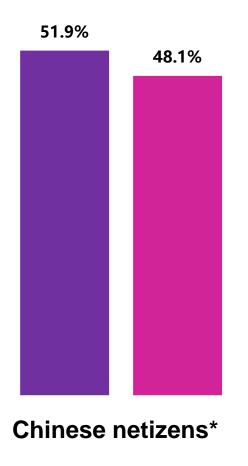
50.7% of respondents said podcast shows **have influenced their purchase decisions at least once**, including buys goods and products mentioned in the shows, visiting cafes or bars recommended by the show.

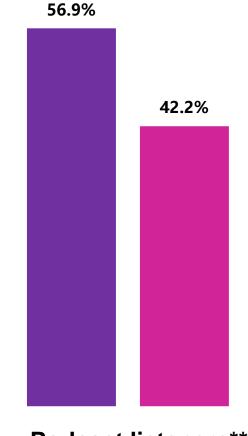
KEY FIGURES

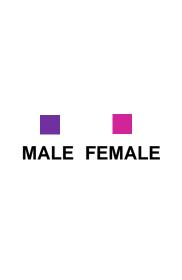
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A Profile: Chinese Podcast Listeners



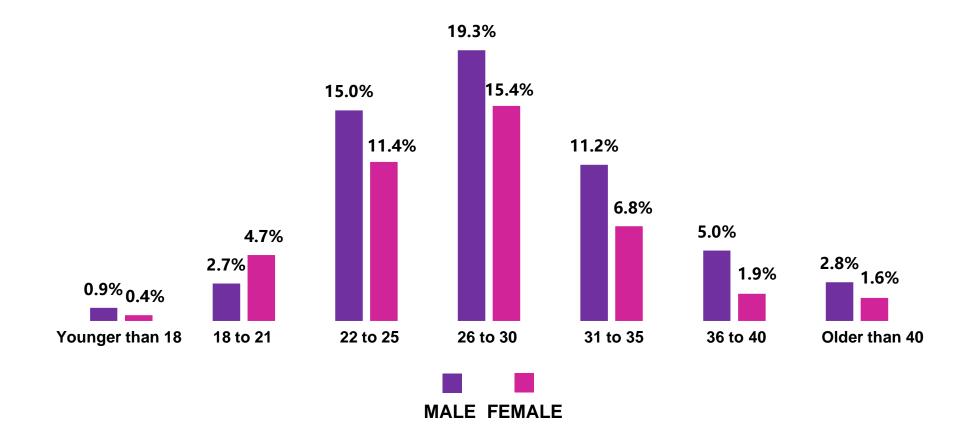






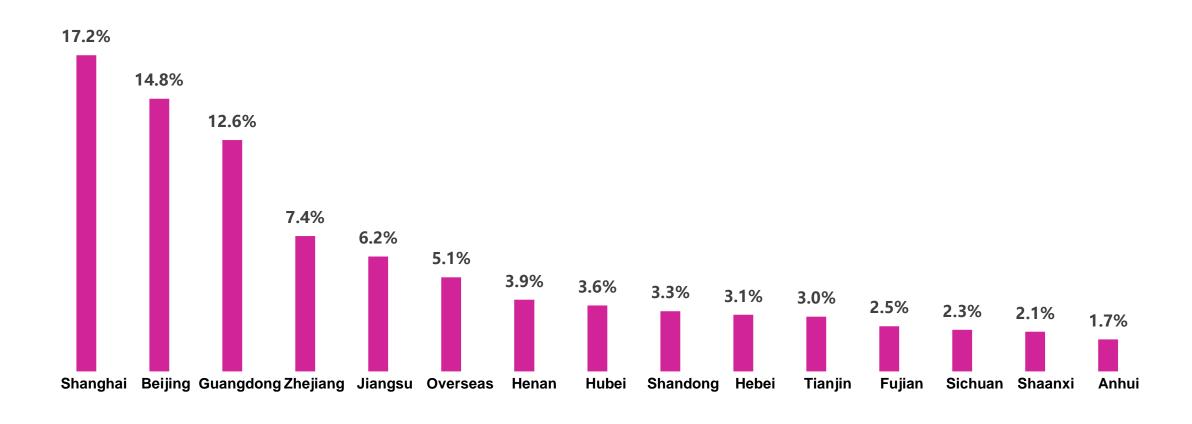
Podcast listeners**



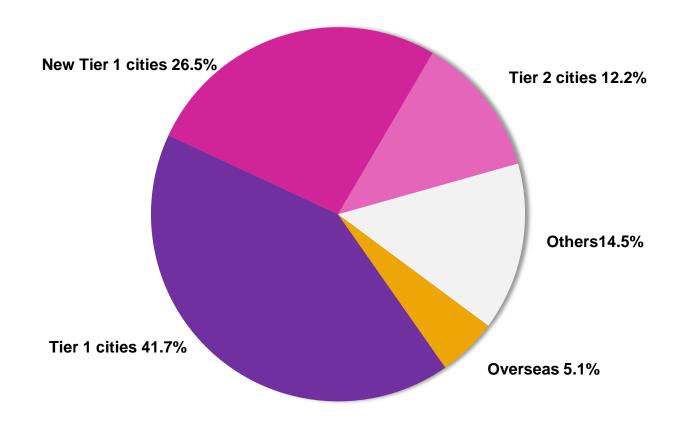




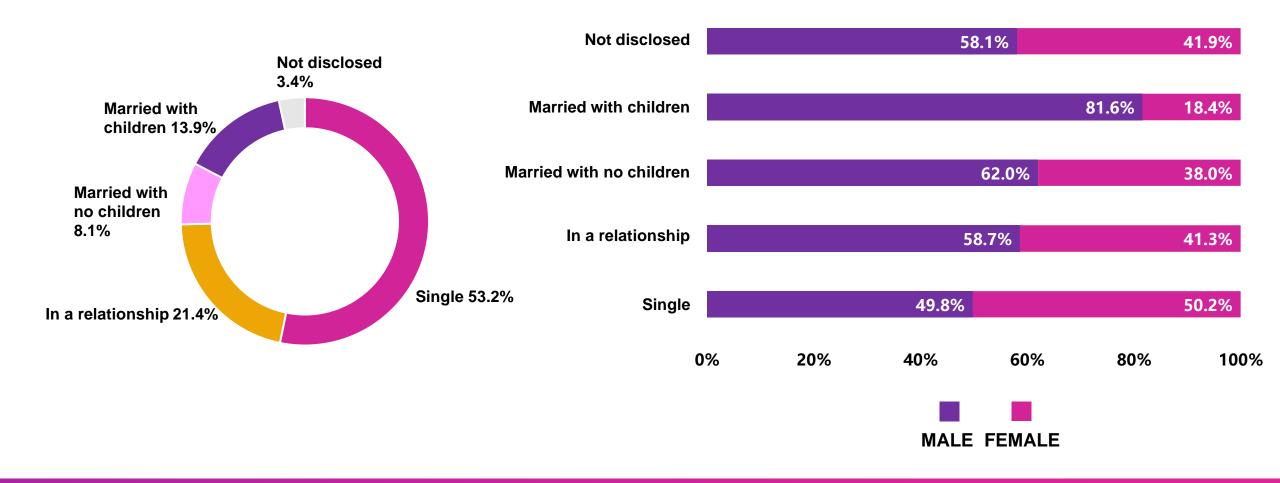
TOP15 GEOGRAPHICAL DISTRIBUTION



BASE CITY CLASSIFICATION

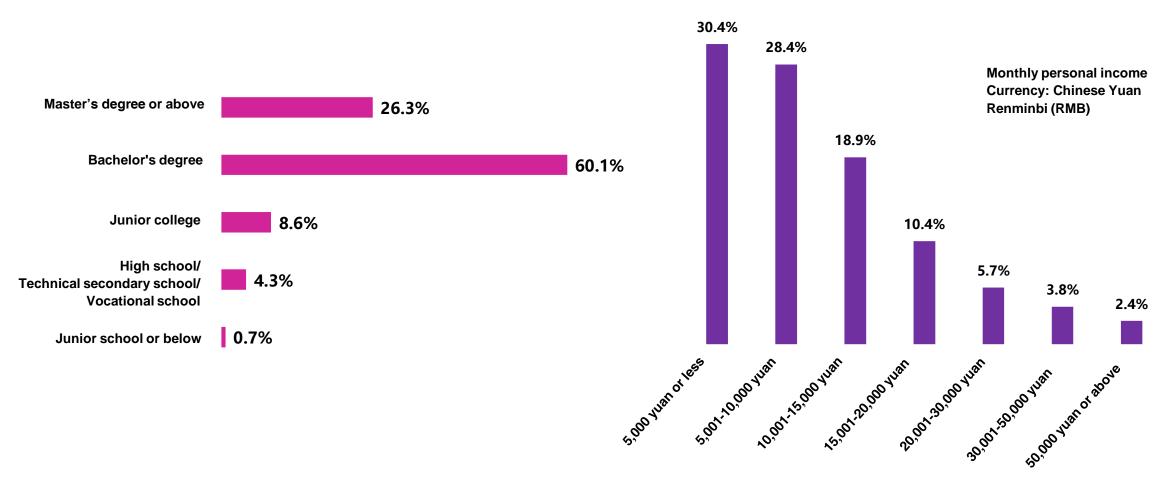


MARITAL STATUS*





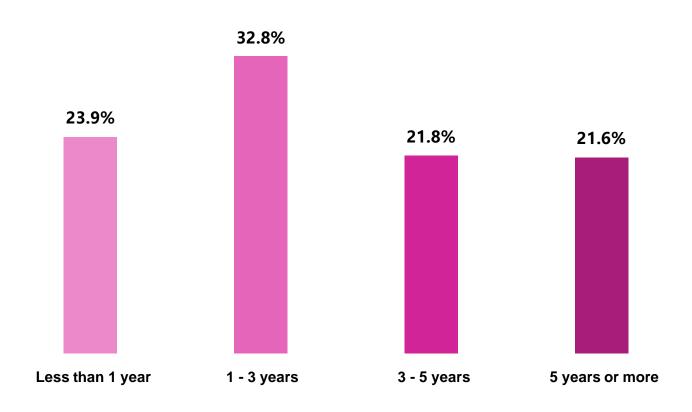
EDUCATIONAL ATTAINMENT AND INCOME LEVEL



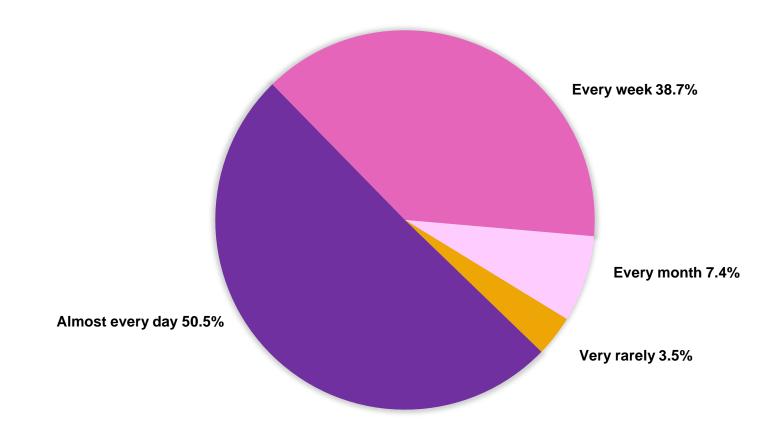
103

CONTENT CONSUMPTION BEHAVIOR

NUMBER OF YEARS LISTENING TO PODCASTS

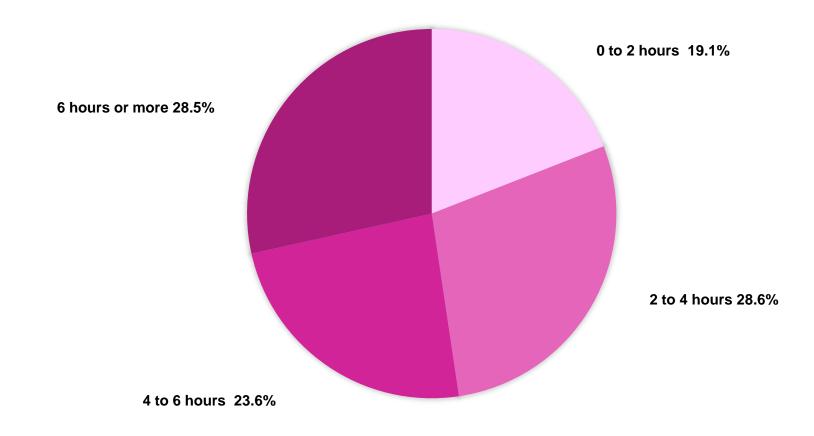


→ PODCAST LISTENING FREQUENCY



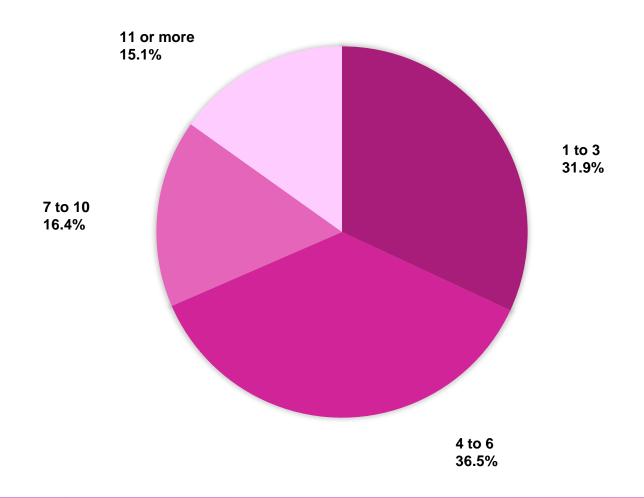


TIME SPENT LISTENING TO PODCASTS BY WEEKLY



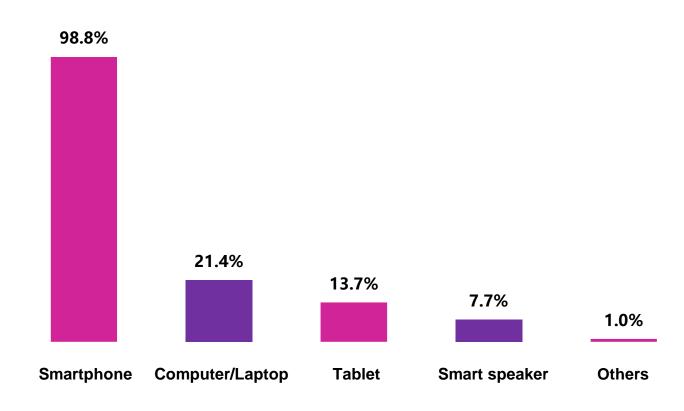


♦ NUMBER OF PODCASTS REGULARLY LISTENED TO



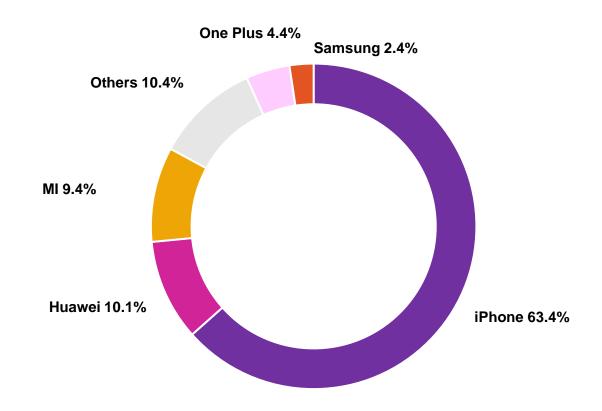


DEVICE USED TO LISTEN TO PODCASTS





MOBILE DEVICES OWNED BY BRAND



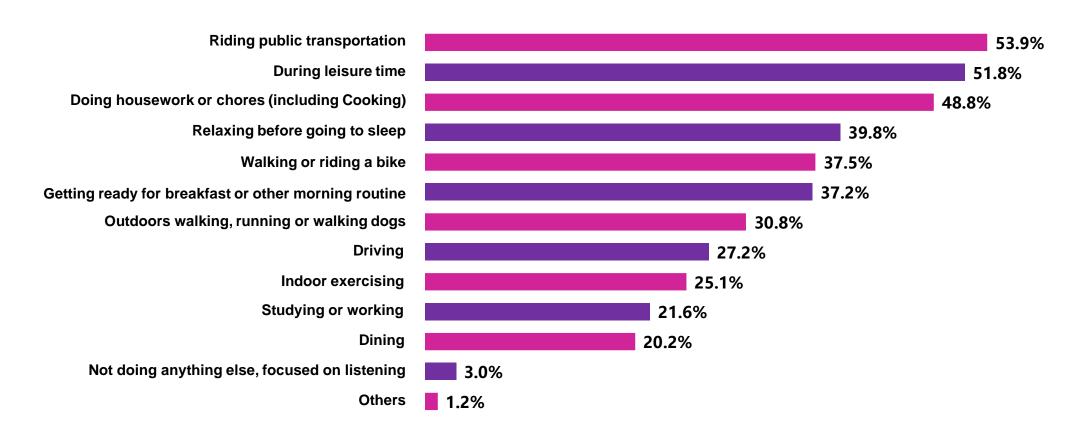


SMART SPEAKERS OWNED BY BRAND

Brand	Respondents	Percentage
Xiaomi smart speaker	14	18.7%
HomePod	13	17.3%
Tmall Genie	8	10.7%
Google Home	5	6.7%
Baidu XiaoDu Al Speaker	3	4.0%
Himalayan Xiaoya Al Speaker	2	2.7%
Amazon Echo	1	1.3%
Others (Bluetooth speakers of other brands)	20	26.7%
Others (not specified)	9	12.0%

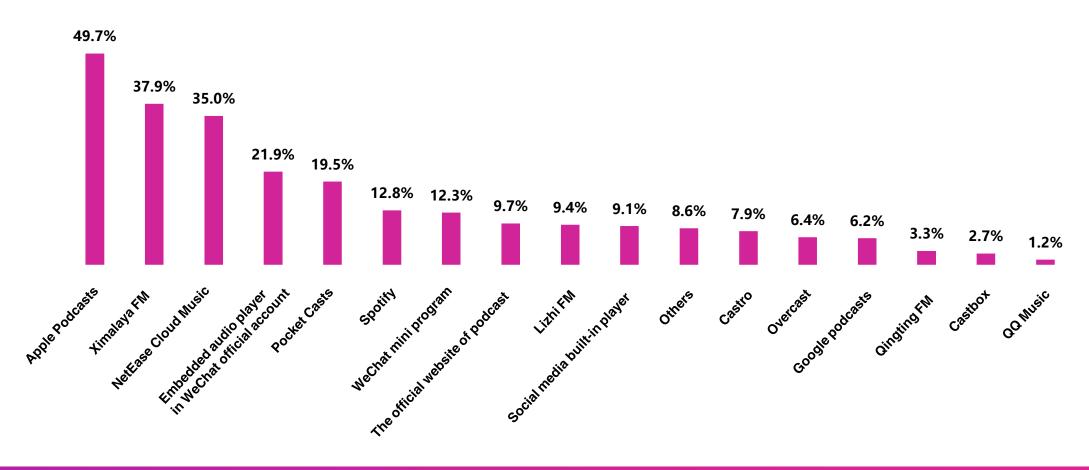


ACTIVITIES DONE WHILE LISTENING TO PODCASTS



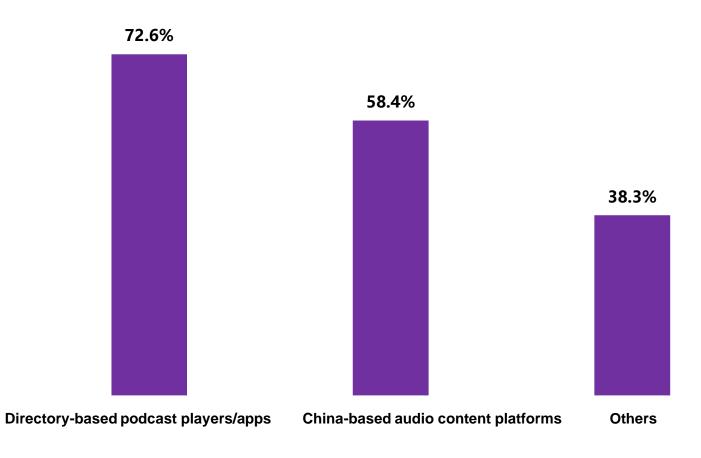


PODCAST CONSUMERS WHO EVER LISTEN TO PODCASTS ON...



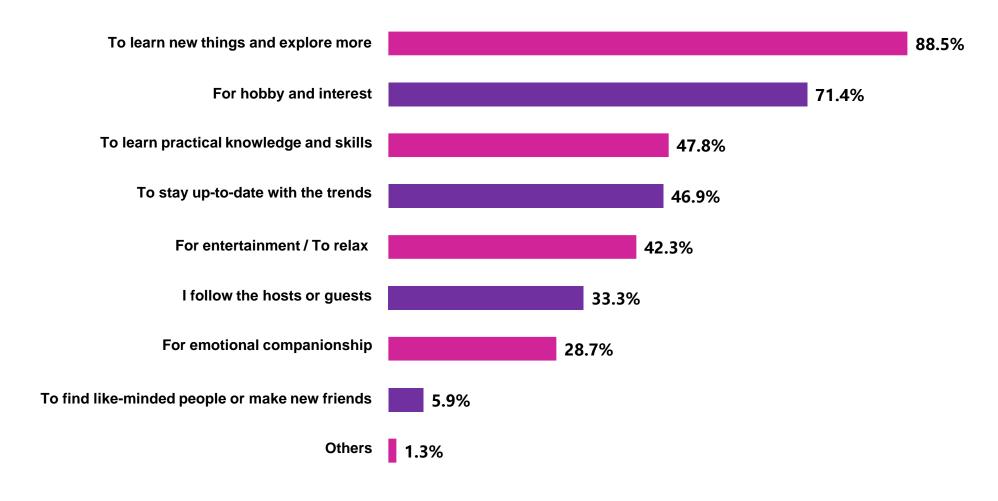


TYPES OF SERVICE FOR LISTENING*



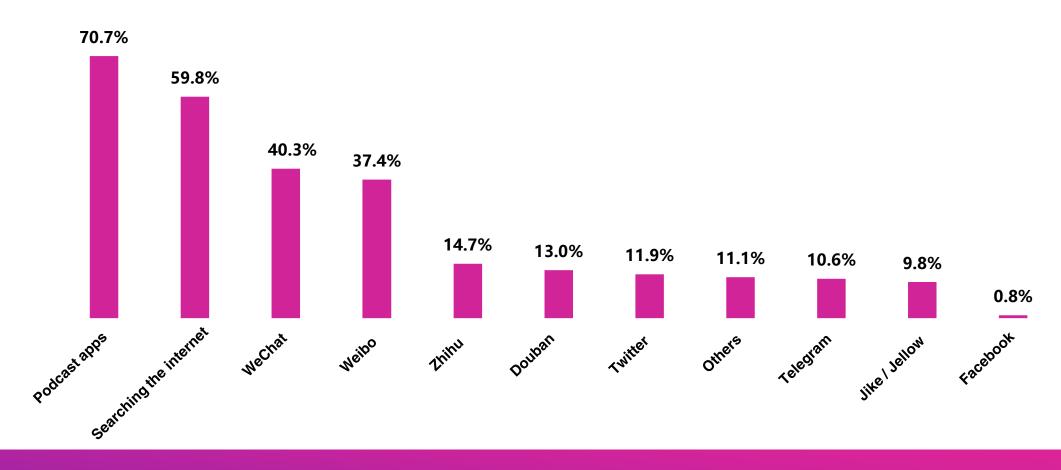
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REASONS FOR LISTENING TO PODCASTS





SOURCES USED TO DISCOVER PODCASTS





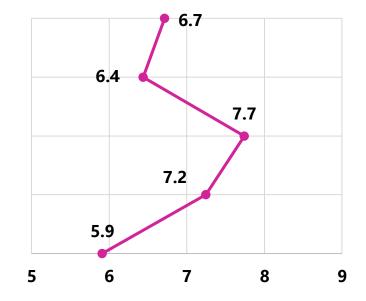
Acquaintances and friends

Hobby/interest groups

Hosts or guests

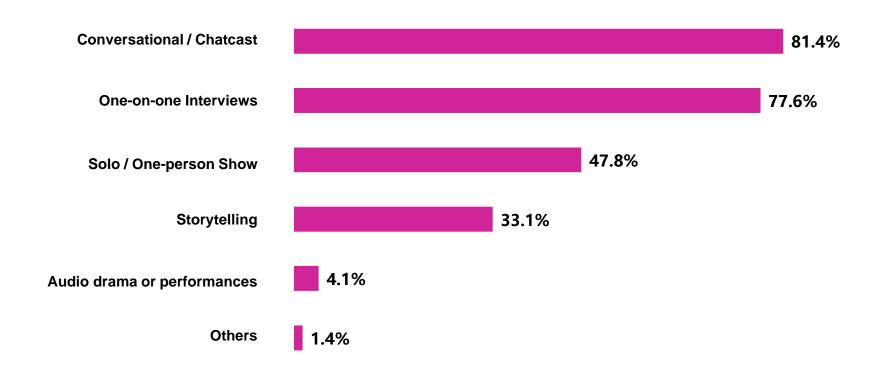
Celebrities in vertical or niche fields

Public figures, institutions or general KOLs



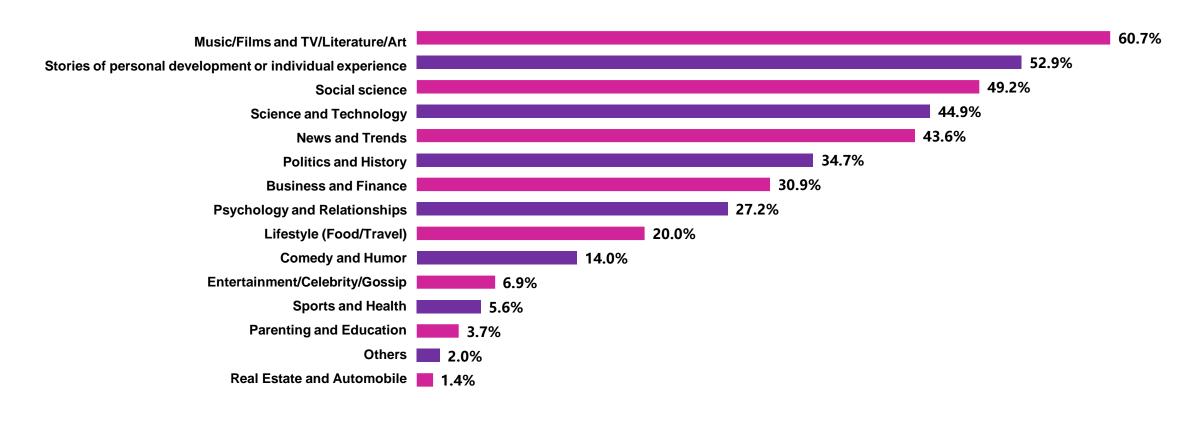
On a scale from 1(much less influential) to 10 (very influential)

POPULAR SHOWS BY FORMAT



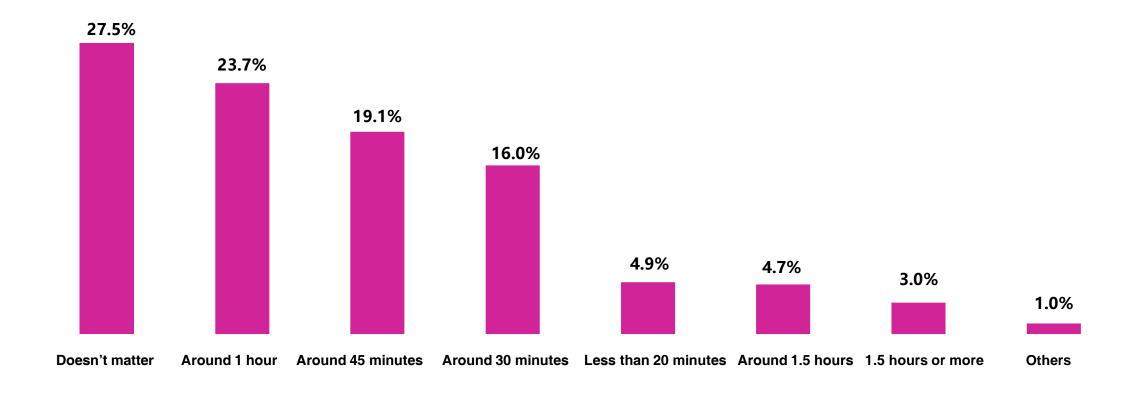


INTERESTED IN LISTENING TO TOPIC ON A PODCAST



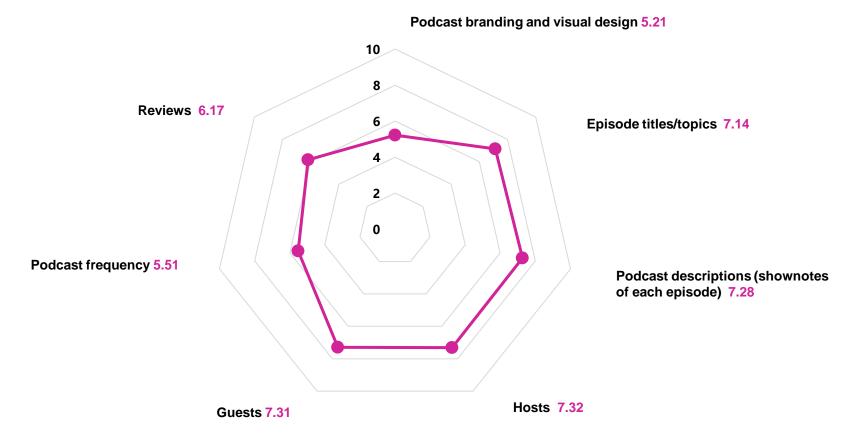


PREFERRED SHOW LENGTH (EACH EPISODE)





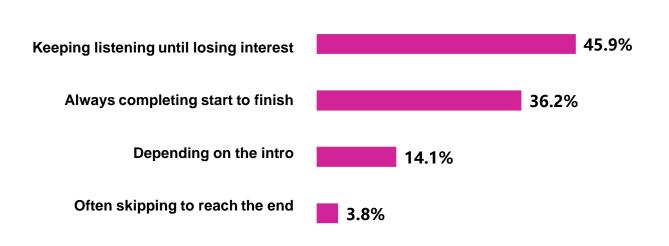
FACTORS IMPACTING LISTENING DECISIONS*



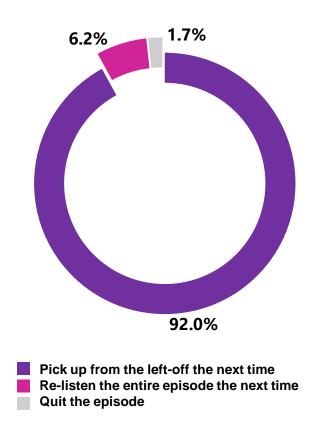
On a scale from 1(much less important) to 10 (very important)



SINGLE EPISODE LISTENING BEHAVIOR

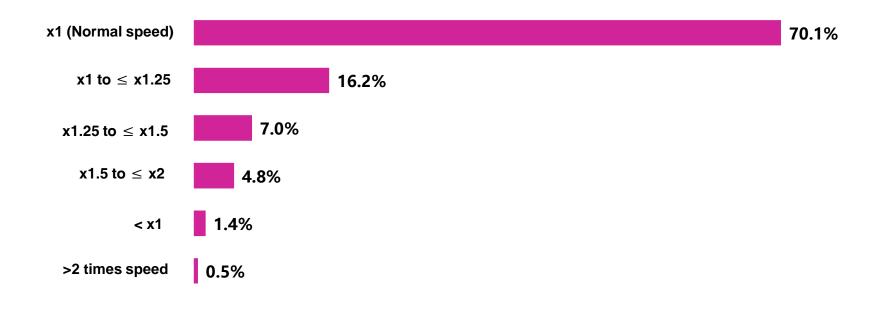


WHEN INTERRUPTED, YOU WILL...

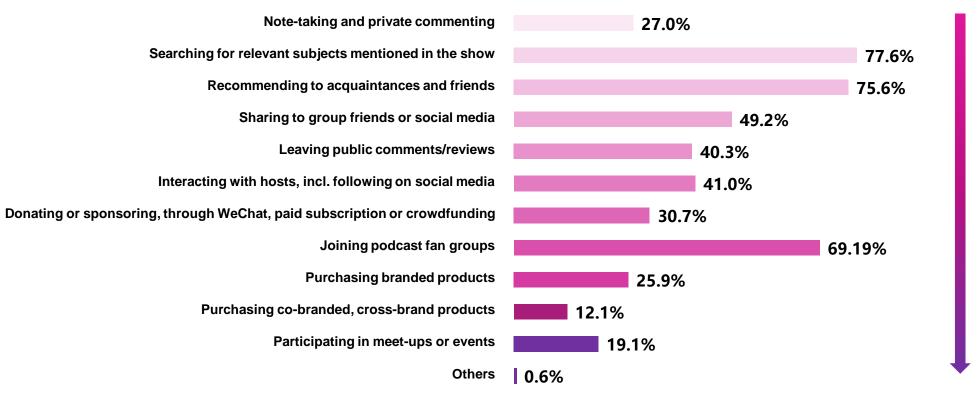




INCREASING PODCAST PLAYBACK SPEED



ENGAGEMENT



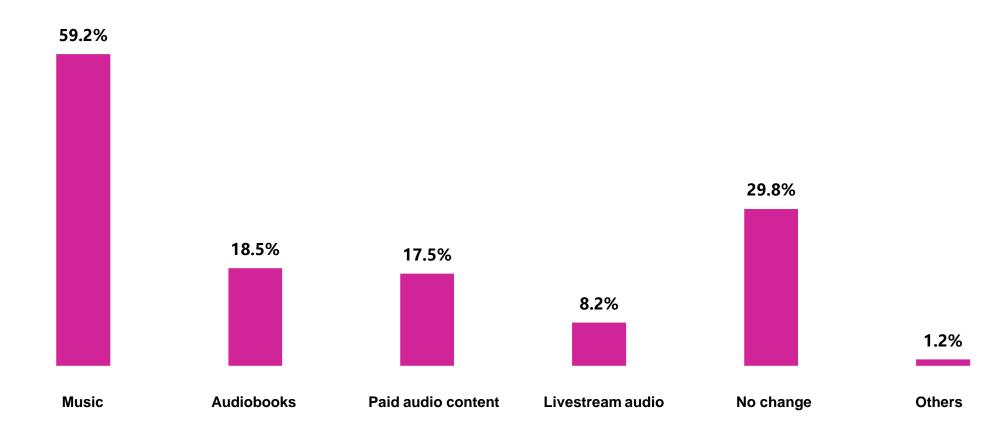
LEVEL
OF
ENGAGEMENT
GETTING
HIGHER

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THE MARKET: COMMERCIALIZATION AND MONETIZATION

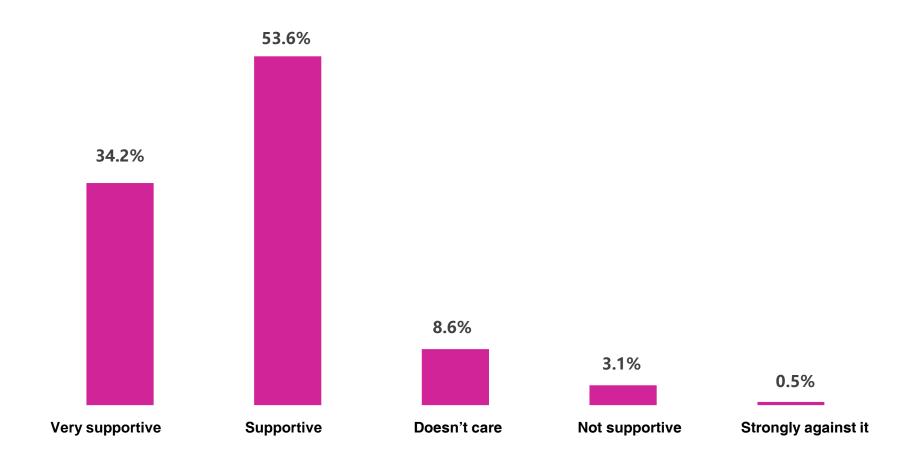


SHIFT IN TIME SPENDING ON AUDIO CONTENT



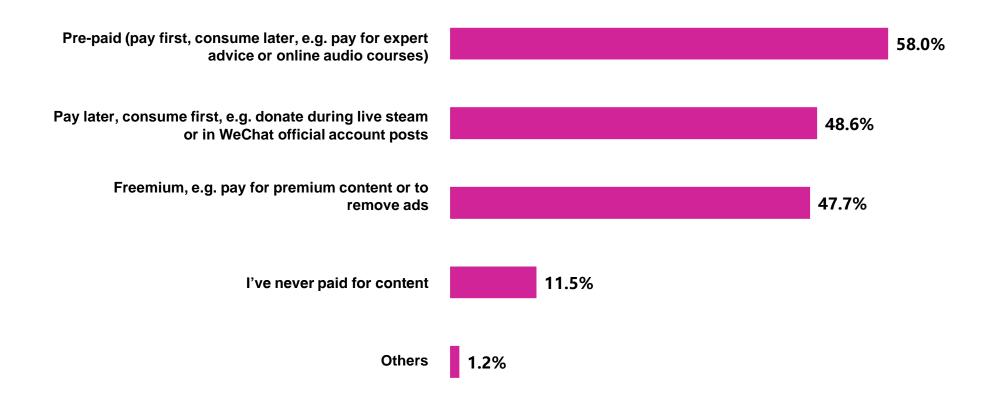


ATTITUDE TOWARDS PODCAST COMMERCIALIZATION

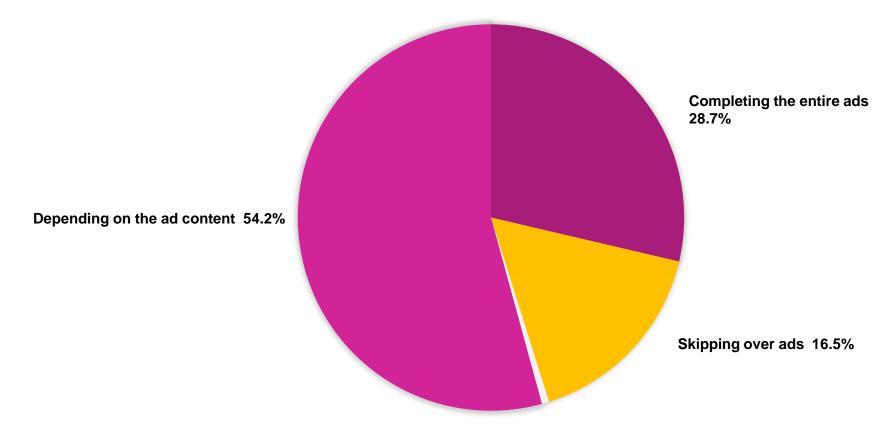




HISTORY OF PAYING FOR CONTENT

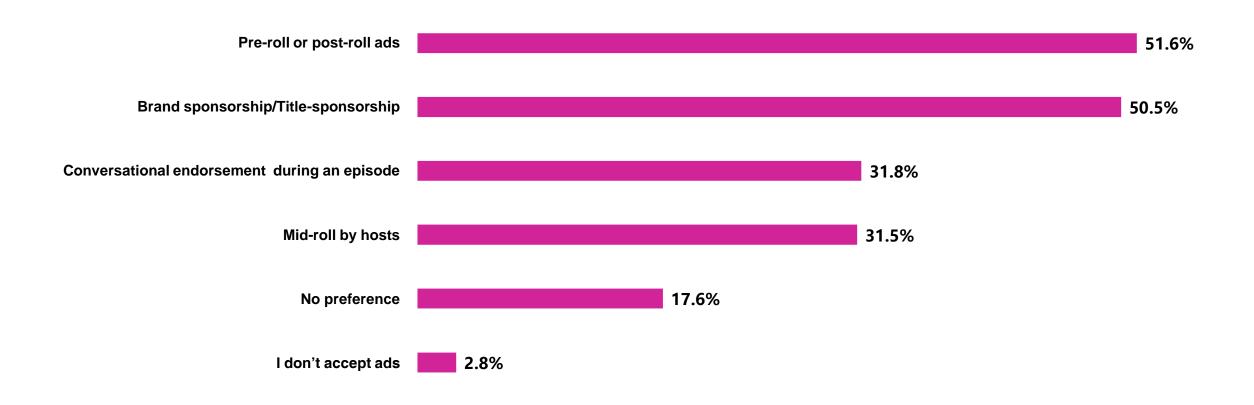


AD ACTIONS UPON IN-PODCAST ADS



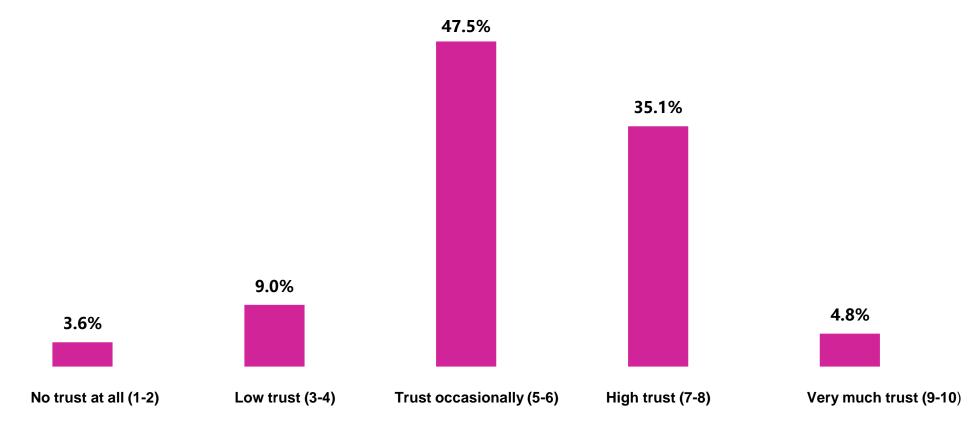
Immediately quitting listening 0.6%

ACCEPTANCE TO PODCAST ADS BY TYPE





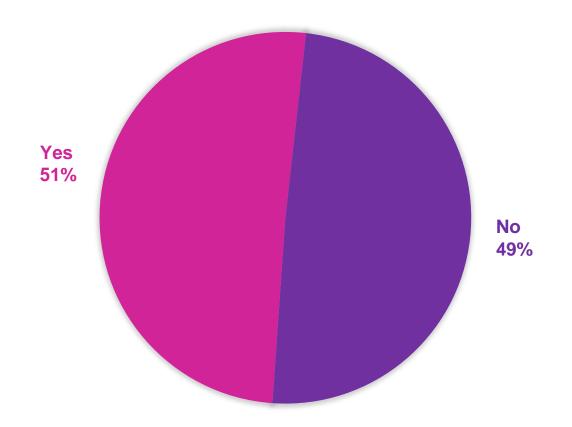
CONSUMER TRUST IN PODCAST ADS



On a scale from 1 (no trust at all) to 10 (very much trust)



HAS LISTENING TO PODCASTS AFFECTED YOUR PURCHASE DECISIONS?





PODFEST CHINA

PodFest China is the first podcasting event in China, co-founded by Rebecca Kanthor, Jingai (Anita) Xu and Yang Yi in 2019. Bringing together top podcasters, audio producers, content distributors and fans together, PodFest China is committed to creating an active, resource-sharing network through a series of events and workshops for Chinese podcasters to exchange ideas and best practice. The first-ever PodFest China conference was successfully held in January 2019 in Shanghai, followed by an audio workshop in June.

We look forward to hearing from you.

Weibo: <a>@PodFestChina

Twitter: <a>@podfestchina

O Instagram: podfestchina

Email: china@gmail.com

Official website: https://podfestchina.com/

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Survey sampling in this report has been adopted with data result affected by samples. Due to the limitation of methods, samples and the scope of data collection, the data only represents selected respondents in the time period specified, meant to providing a baseline reference of the market and its consumers. PodFest China assumes no legal responsibility for the data and opinions in the report.

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