**NPR**

2022 NPR PODCAST REPORT
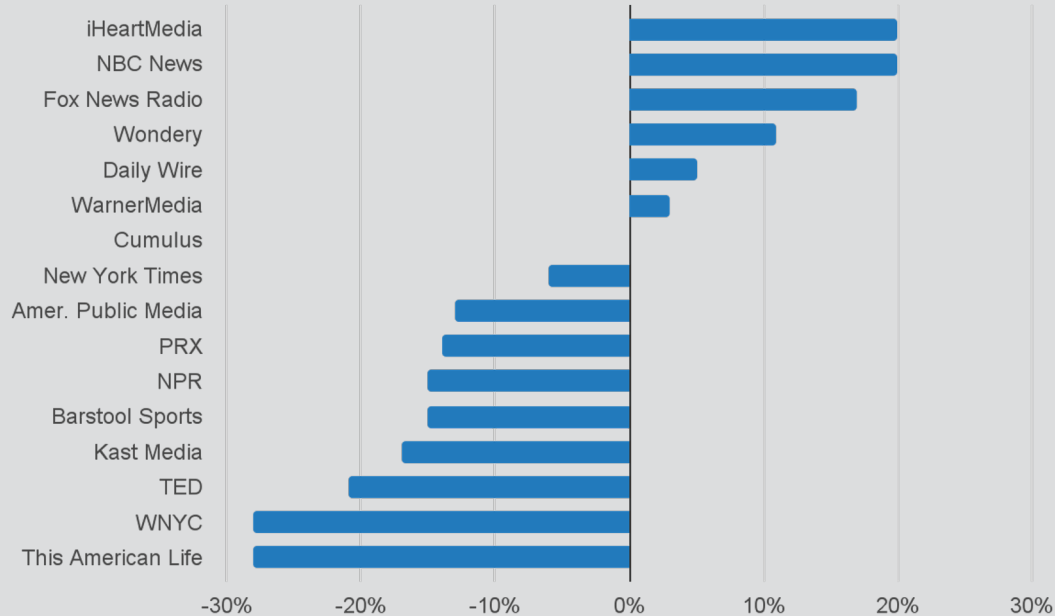
JANUARY 2022

NPR PODCAST TRENDS

Every year the scale and promise of podcasts expand, and 2022 looks to be no exception. Despite (or because of) the challenges of the last two years, Americans are hungry for great shows that inform and engage, and NPR is bullish on the opportunities ahead.

Since launching our podcast directory in 2005, NPR has been a leader in this growing space. As more and more Americans have discovered podcasts, we're proud to engage these listeners with new shows, new voices, and the deep journalism and storytelling that NPR is known for.

33% of all podcast listening in the US is NPR podcasts
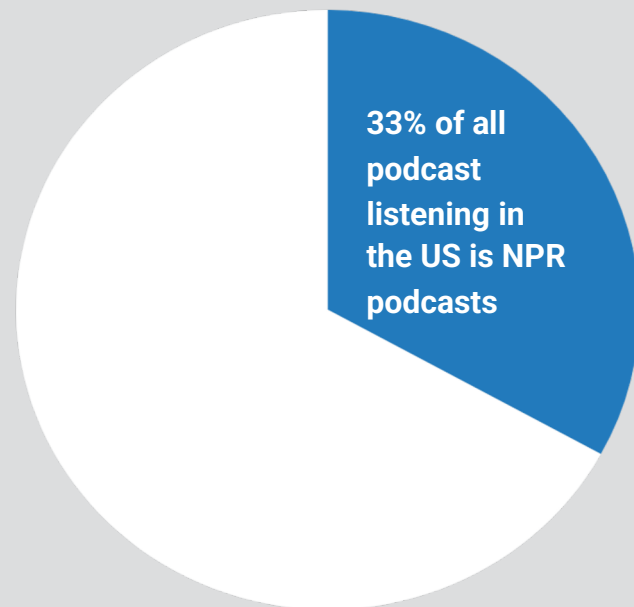
Average daily listening time.
Source: Edison Research, Share of Ear Q4 2021

CHANGE IN MONTHLY PODCAST USERS, 2020-2021

Publisher	Change
iHeartMedia	20%
NBC News	20%
Fox News Radio	17%
Wondery	11%
Daily Wire	5%
WarnerMedia	3%
Cumulus	0%
New York Times	-6%
Amer. Public Media	-13%
PRX	-14%
NPR	-15%
Barstool Sports	-15%
Kast Media	-17%
TED	-21%
WNYC	-28%
This American Life	-28%

Source: Podtrac

2021 was a challenging year in the podcast space, particularly for publishers of news and information programs. Given events of the last two years, many Americans pulled back from the news in 2021, and thus many podcast publishers including NPR experienced some declines in audiences. In addition, broader economic challenges slowed investments in new podcasts for many organizations, including NPR.
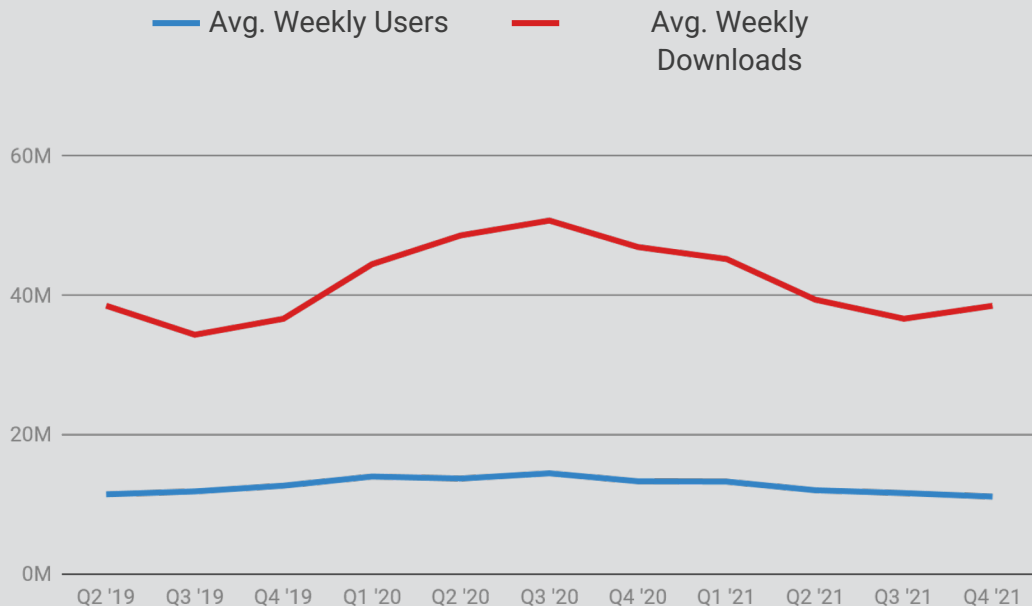
PODCAST INDUSTRY RANKING HIGHLIGHTS
TOP PODCAST PUBLISHERS
US AUDIENCE: **DECEMBER 2021**

RANK	PODCAST PUBLISHER		US UNIQUE MONTHLY AUDIENCE	GLOBAL DOWNLOADS & STREAMS	ACTIVE SHOWS	SALES CONTACT
1	iHeartRadio	✓	31,947,000	391,915,000	615	iHeartRadio
2	NPR	✓	18,659,000	164,905,000	49	National Public Media
3	Wondery	✓	10,816,000	69,669,000	136	Wondery Brand Partnerships
4	New York Times		8,841,000	92,147,000	9	
5	NBC News		8,072,000	57,648,000	52	
6	The Walt Disney Company	✓	7,722,000	49,041,000	102	ESPN Audio Sales
7	PRX		6,634,000	62,787,000	93	
8	Cumulus Podcast Network	✓	5,903,000	48,862,000	121	Cumulus Podcast Network
9	Barstool Sports	✓	5,564,000	31,384,000	68	Barstool Sports Sales
10	Daily Wire	✓	5,246,000	54,692,000	8	Cumulus Podcast Network

Source: Podtrac

Given all these market realities, NPR is proud to be the **#2 podcast publisher** in the US according to Podtrac.

NPR PODCAST TRENDS

—— Avg. Weekly Users   **——** Avg. Weekly Downloads

60M

40M

20M

0M

Q2 '19 Q3 '19 Q4 '19 Q1 '20 Q2 '20 Q3 '20 Q4 '20 Q1 '21 Q2 '21 Q3 '21 Q4 '21

Source: NPR podcast measurement system, certified through the IAB

NPR's weekly users are down 16% year on year (Q4 2021 vs Q4 2020).

Downloads have decreased 18% in the same time period.

For NPR, podcast downloads declined early in 2021 but turned around in the last quarter. Although audiences of some of our news podcasts fell in 2021, we observed a hunger for daily shows, with audiences growing for Pop Culture Happy Hour and other daily content.

TOP 25 NPR PODCASTS

Based on average weekly users for Q4 2021

⬆ Fastest-growing shows since Q4 2020

1	Up First	14		Invisibilia
2	NPR News Now	15		Life Kit
3	Fresh Air	16		Code Switch
4	Planet Money	17	⬆	Car Talk
5	Wait Wait… Don't Tell Me!	18		It's Been a Minute with Sam Sanders
6	NPR Politics Podcast	19		1A
7	The Indicator from Planet Money	20		All Songs Considered
8	TED Radio Hour	21		NPR's Book of the Day NEW
9	How I Built This	22	⬆	Radio Ambulante
10	Consider This	23		Ask Me Another
11	Short Wave	24		Rough Translation
12	⬆ Pop Culture Happy Hour	25		Here & Now
13	Throughline			

Source: NPR podcast measurement system, certified through the IAB

**BRINGING LOCAL NEWS TO
A NATIONAL PODCAST**

With news deserts growing, NPR's member stations play a pivotal role in keeping local journalism in communities across the country, both on radio and on digital platforms. *Consider This* brings that local reporting to a national podcast. Since September 2020, it has been the first localized daily news podcast in the United States. Listeners in ten regions with collaborating member stations hear a version of *Consider This* with stories from their community alongside a national view from NPR.

Local content drives engagement with *Consider This* listeners

Incorporating local content helps people stay informed with what's happening in their community, and sets *Consider This* apart from other news shows in a competitive market. Many surveyed listeners saw the local segment as a distinguishing feature of the podcast.

Listeners who hear a localized version of *Consider This* on NPR One use the app
93% more often
per week than average app users, and
7% more often
than those who hear the non-localized version of *Consider This*

Some cited it as the reason they subscribed, others loved the addition of information on their local area, and one audience member said they "literally yelped" when they realized *Consider This* "was giving [them] local news through an add on to a national podcast with the same kind of quick 1-2 updates that [they] needed to know about [their] local area."

Local content helps retain users, too. Data from NPR One, our audio app, has shown that those who hear *Consider This* with a local segment come back to the app more often than those who hear a non-localized version: a pattern we have seen again and again with local content.

Local journalism is also a selling point for new, diverse audiences. When we tested ads for *Consider This* with Hispanic and Black podcast listeners aged 22-34, who didn't already listen to NPR, they became significantly more interested in *Consider This* when local messaging was added to display ads.

Keeping listeners' attention through news you can use

It can be difficult to find the sweet spot for local news—listeners want specificity to their community, as well as relevance to their personal lives. And audience interest can depend on whether "local" means their neighborhood, their city, or their state.

At NPR, we've seen success in "news you can use" local stories that center the impact for a person's daily life. This aligns with survey feedback where listeners stressed the importance of relevance with local content. *Consider This* segments with high engagement included how to vote by mail in Texas, how COVID restrictions could impact other types of medical visits in the Bay Area, and interesting changes to traffic policing in Philadelphia.

Each of these stories was framed to help listeners understand the stakes for *them* and members of their communities.

Some of these **story frames** include:

➜ Describing the impact of a change in the community

➜ Showing the stakes for why an issue should matter to listeners

➜ Explainers that break down what is really going on

➜ Stories that touch on local pride, or what makes a community special

Our audience continues to show a hunger for local-national news experiences, which are made possible by public radio's shared journalism and digital networks.

Neal Carruth, NPR's senior director for on-demand programming, said, "This project is truly the best reflection of the public radio mission. *Consider This* is now a collaborative podcast that will know where users are and deliver them the news of the day from their community and beyond. It demonstrates what only the public radio network has the ability to do."

–Erica Liao, Senior Digital Analyst

SPONSORSHIP IMPACT BY ALIGNING WITH AUDIENCE PASSIONS

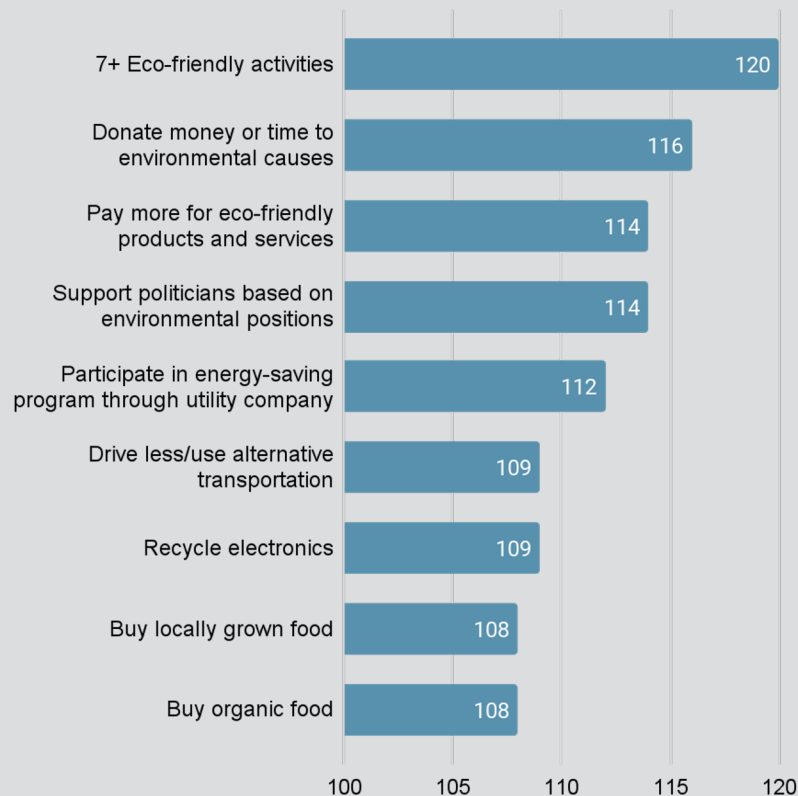# NPR podcast listeners are passionate about helping the environment

Across all platforms, one of the most distinctive characteristics of NPR listeners is how passionate they are in their concern for the environment. That is reflected in their shopping -- seeking out and paying more for environmentally-friendly products -- their community engagement -- participating in organizations to protect the environment, voting for politicians who support the cause -- and their leisure -- spending time outdoors or improving their own outdoor spaces.

This passion comes through loud and clear in the Nielsen Podcast Buying Power study. NPR Podcast users are more likely to report doing multiple eco-friendly activities and are especially more likely than the average podcast users to:

- Donate money or time to environmental causes
- Pay more for eco-friendly products and services
- Support politicians based on environmental positions

Eco-friendly activities done on a regular basis

Index for NPR Podcast Users vs. Total Podcast Users (Average = 100)

Activity	Index
7+ Eco-friendly activities	120
Donate money or time to environmental causes	116
Pay more for eco-friendly products and services	114
Support politicians based on environmental positions	114
Participate in energy-saving program through utility company	112
Drive less/use alternative transportation	109
Recycle electronics	109
Buy locally grown food	108
Buy organic food	108

Source: Nielsen Podcast Buying Power, Nov 2021

An ideal environment for brands with environmentally-friendly products

NPR listeners' passion for the environment translates into support for sponsors that are providing products that help the environment or make use of natural ingredients. Two examples of sponsors that have found success in building awareness and positive image with the NPR audience by aligning with this passion are an electric car brand and a natural food product. Both saw their sponsorship drive gains in awareness and interest in their products.

Electric Auto

34 million impressions
Over 15 weeks

141% lift* in awareness among EV intenders

45% of EV owners/intenders want to learn more about the vehicle

176% lift in selecting the sponsor as the brand most likely to consider

Natural Food Product

6 million impressions
Over 9 weeks

64% lift in awareness

37% lift in interest in learning more about the brand

92% lift in brand trial

*Lift vs. a control group of NPR listeners who did not listen to podcasts airing the sponsor's messages
Source: MRI-Simmons 2021 August Podcast Study, NPR Listeners NPR Sponsorship Surveys 2021

Podcast audience data helps advertisers align with audience interests

Other advertisers and producers can take a similar approach to strong impact on podcast advertising by understanding the interests of their audiences. Data from Nielsen's Podcast Buying Power and the MRI-SImmons Podcast Studies can help to identify which kinds of podcast audiences will be most receptive to a brand's messages.

For example, if you produce a TV & Film podcast, the MRI-Simmons Podcast Study shows that listeners to this type of podcast content are more likely to be passionate about electronics, making shows in this genre a great place to tell listeners about new tech products.
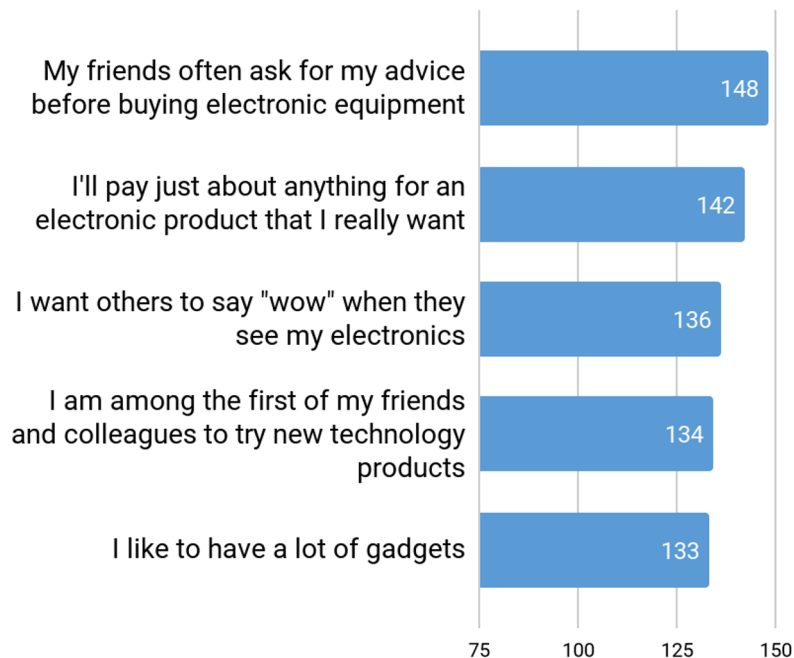
–Susan Leland, Associate Director, Audience Insights

Source: MRI-Simmons 2021 August Podcast Study.
*Respondents saying topic was covered in podcasts they listened to in the past 30 days.
Index vs. total podcast users for % agree completely with statement, average =100.

Indexes Among Listeners to TV & Film Podcasts*

Statement	Index
My friends often ask for my advice before buying electronic equipment	148
I'll pay just about anything for an electronic product that I really want	142
I want others to say "wow" when they see my electronics	136
I am among the first of my friends and colleagues to try new technology products	134
I like to have a lot of gadgets	133

(Axis: 75, 100, 125, 150)

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nationalpublicmedia.com/audio/
podcast-sponsorship/