

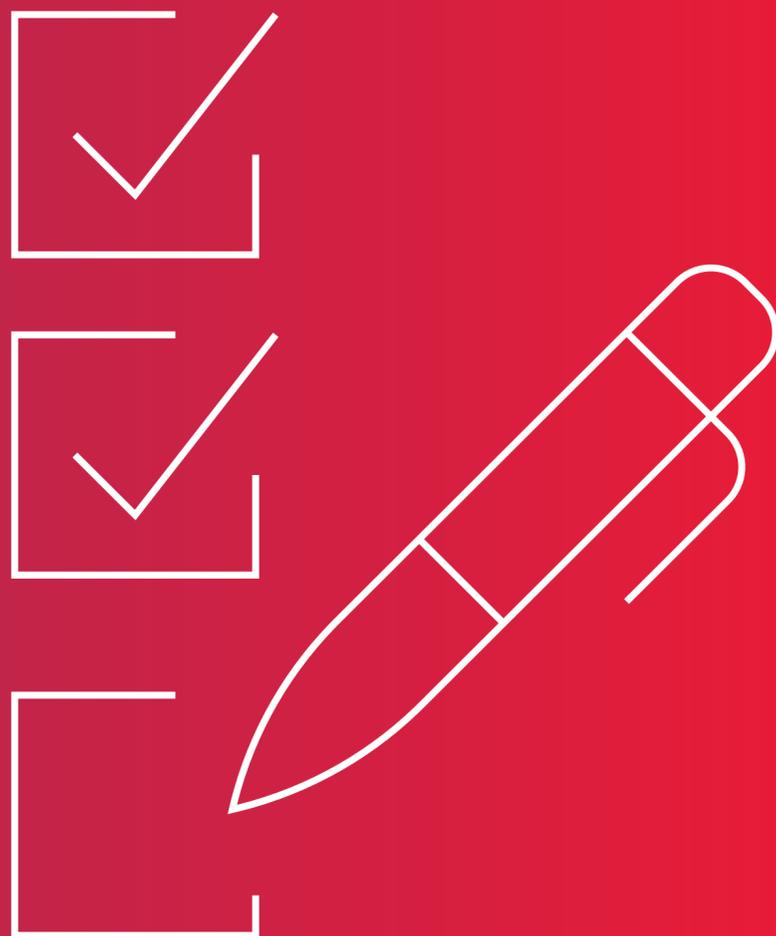
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PODCAST

2025 REPORT

KEY FACTS



- ⊕ The popularity of podcasts continues to grow: **daily usage in particular is increasing.**
- ⊕ For the first time, the **reach of podcasts exceeds that of radio in the young target group** of ages 18–29.
- ⊕ The **advertising spend** for podcasts is still **far too low** in relation to the duration of use.
- ⊕ No other medium **has grown** as much as podcasts in recent years.
- ⊕ Podcasts create **incremental reach**, both to TV and to social media.
- ⊕ Podcasts are the medium with the greatest repositioning in terms of age and gender: over the last 6 years, the user structure has developed from a strongly male-dominated (85%) to a female-dominated one. **No other medium has repositioned itself in the user base to such an extent in the last 6 years.**
- ⊕ Video podcast usage is currently (still) **low**; Gen Z prefers audio podcasts.
- ⊕ Podcast hosts are perceived as **more influential** than social media influencers – **across all age groups.**
- ⊕ Podcast advertising increases both **the willingness to use** and the **aided advertising recall** and has a **positive** effect **on the brand image.**



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Seven.One Audio is the leading podcast marketer in Germany. We stand for professional hosts, brand-safe environments, quality entertainment and, above all, creative and high-quality ads in a unique environment: podcasts.

Our exclusive podcast portfolio includes **“Baywatch Berlin”** with Klaas Heufer-Umlauf, Jakob Lundt and Thomas Schmitt, **“Mordlust”** with Paulina Krasa and Laura Wohlers and **“Apokalypse und Filterkaffee”** with Micky Beisenherz. We market a wide range of formats in various genres such as “Comedy”, “Sport” and “True Crime”.

With the **“Premium Audio Network”** we offer one of the largest German-language podcast networks. Podcast inventories are bundled for advertisers and can be booked in various rotations. Our total of 18 rotations includes “Entertainment”, “Lifestyle & Health” and “Family & Parents”.

Through innovative market and advertising research, we examine the effectiveness of podcast advertising and analyse the market and listeners of podcasts.

In this update of the podcast study, we look at:

- **the German and US podcast market in general,**
- **the relevance of podcast listeners for advertising companies with a focus on the female target group,**
- **the high-end form of podcast advertising: “host-read ads”**

and

- **a comparison of audio and video podcast use.**

This is the third major market study that Seven.One Audio has conducted on the topic of podcasts. If you compare the results with those from 2024, it becomes clear that:

- **The use of podcasts continues to grow sharply, particularly daily use.**
- **The podcast user structure has changed – podcast listeners are female and young!**
- **The podcast is the only medium that is continuously growing in terms of duration of use.**
- **The use of video podcasts is at a low level.**

Enjoy reading the Seven.One Audio Podcast Report 2025!

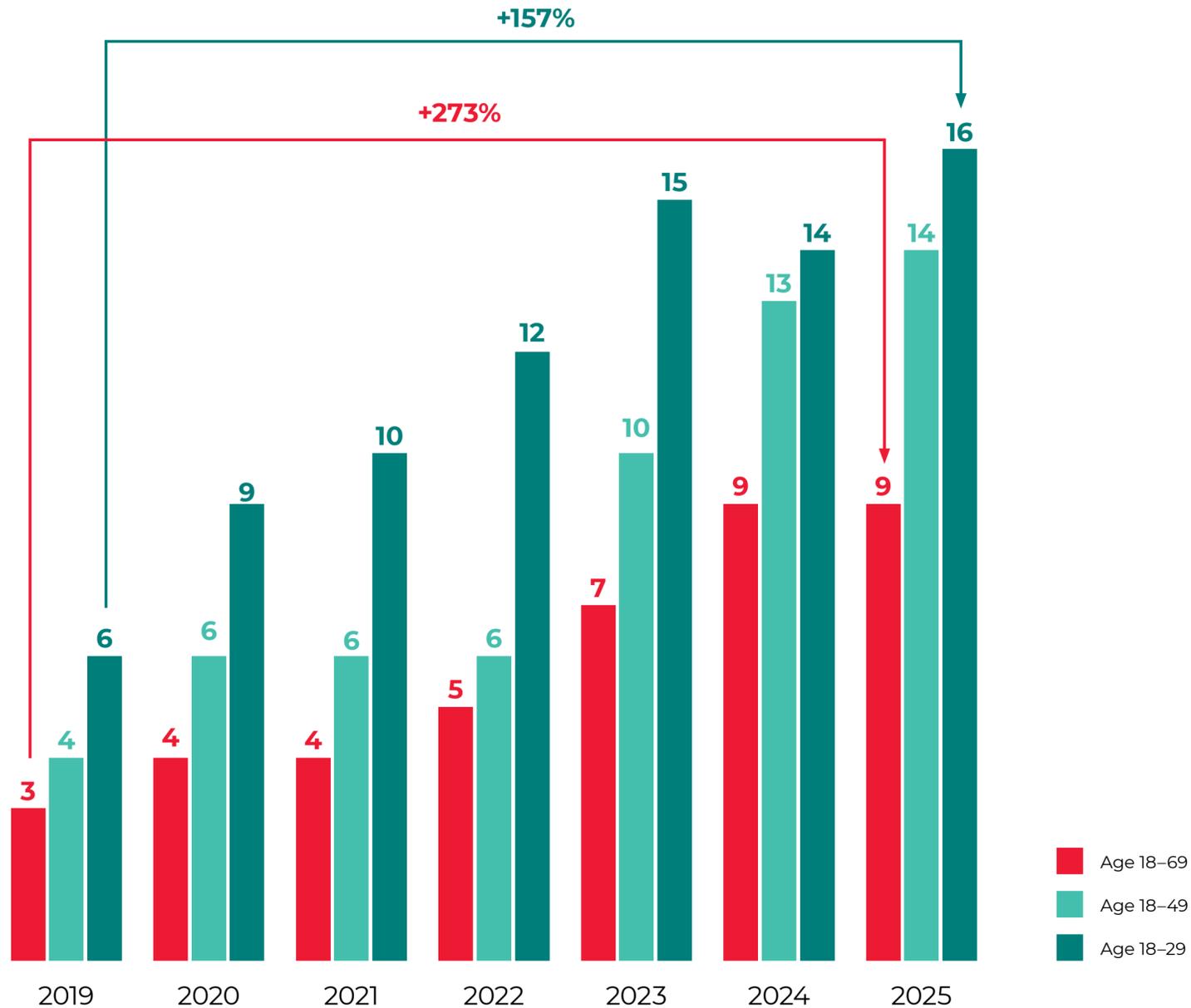


THE **PODCAST** **MARKET** IN FIGURES

PODCASTS CONTINUE TO GROW – ESPECIALLY THE DURATION AND FREQUENCY OF USE

Duration of use

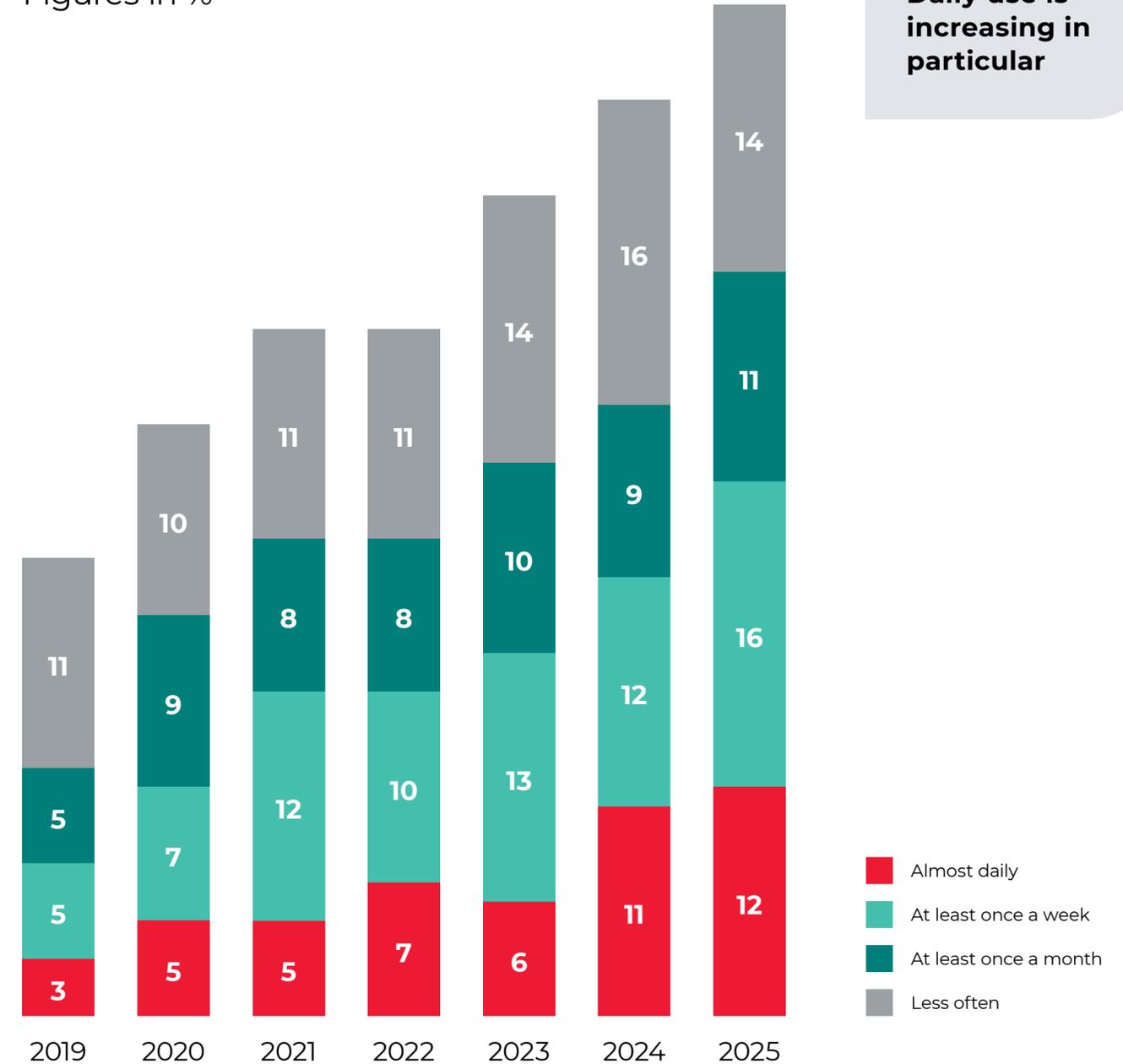
Data in minutes



Basis: People aged 18-69, n = approx. 2,340 per year
Source: ViewTime Report 2025, forsa

Development of podcast usage frequency

Figures in %



Daily use is increasing in particular

Basis: People aged 18-69, n = approx. 2,340 per year
Source: ViewTime Report 2025, forsa

PODCASTS SURPASS RADIO – THE YOUNG TARGET GROUP RELIES ON PODCASTS

Podcast reach development

At least occasional use

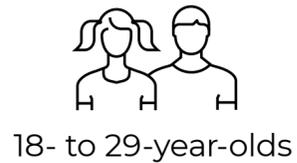
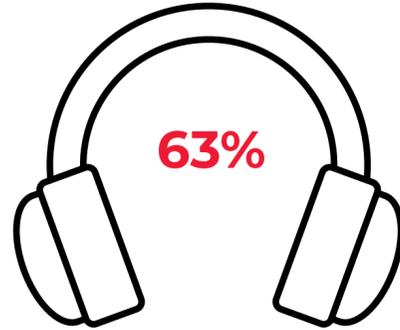


63% of 18- to 49-year-olds listen to podcasts in 2025

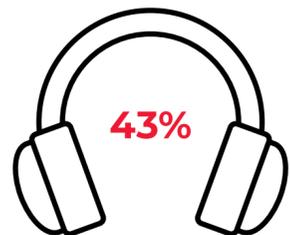
2019



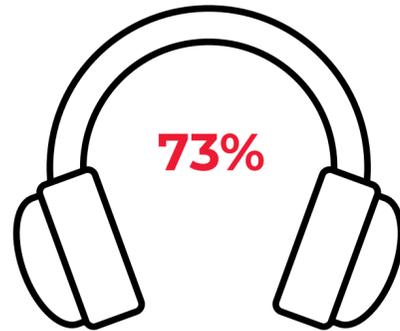
2025



2019



2025

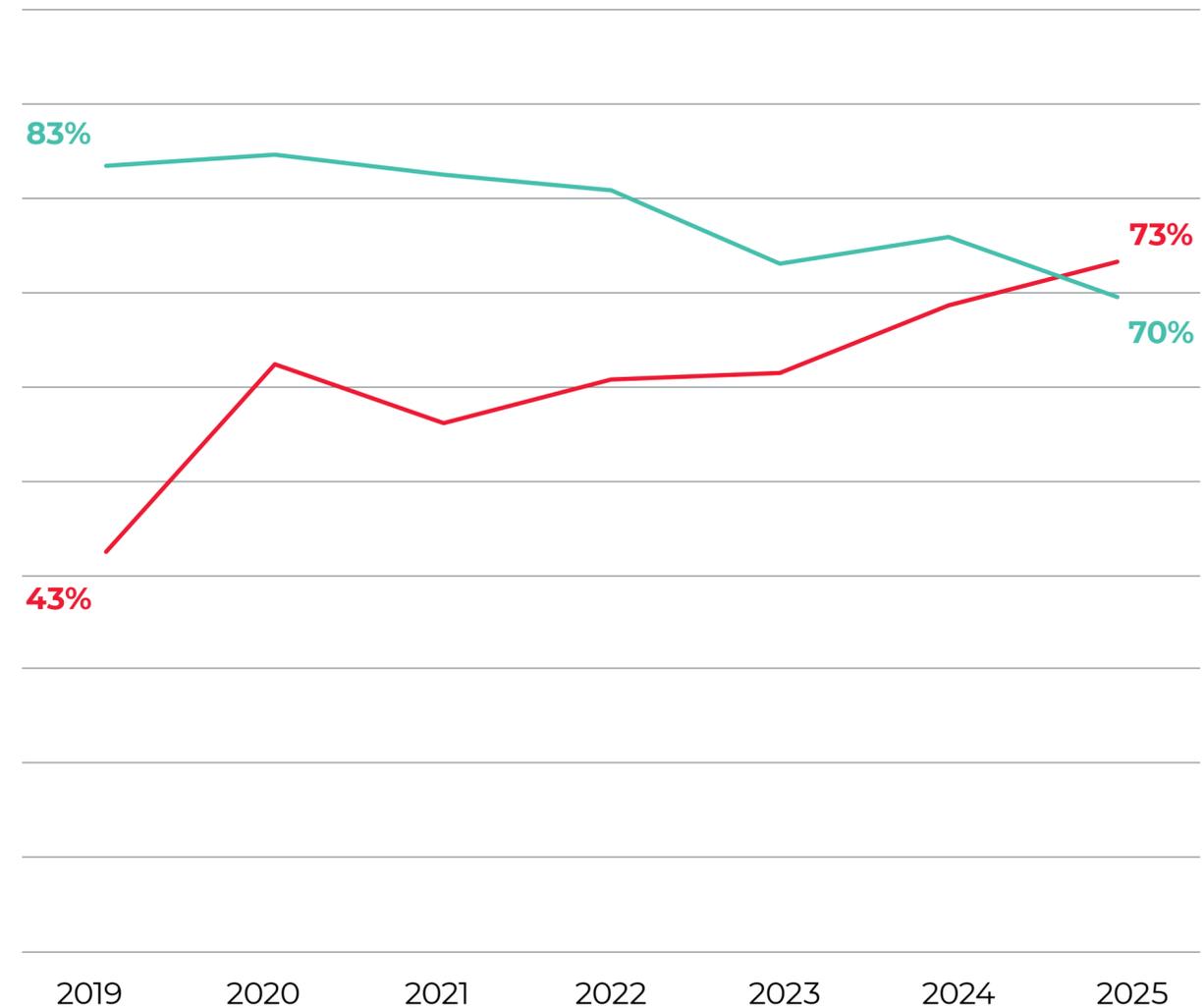


Basis: People aged 18–49, n = approx. 1,500 per year
Source: ViewTimeReport 2025, forsa

Reach development radio vs. audio

Figures in %

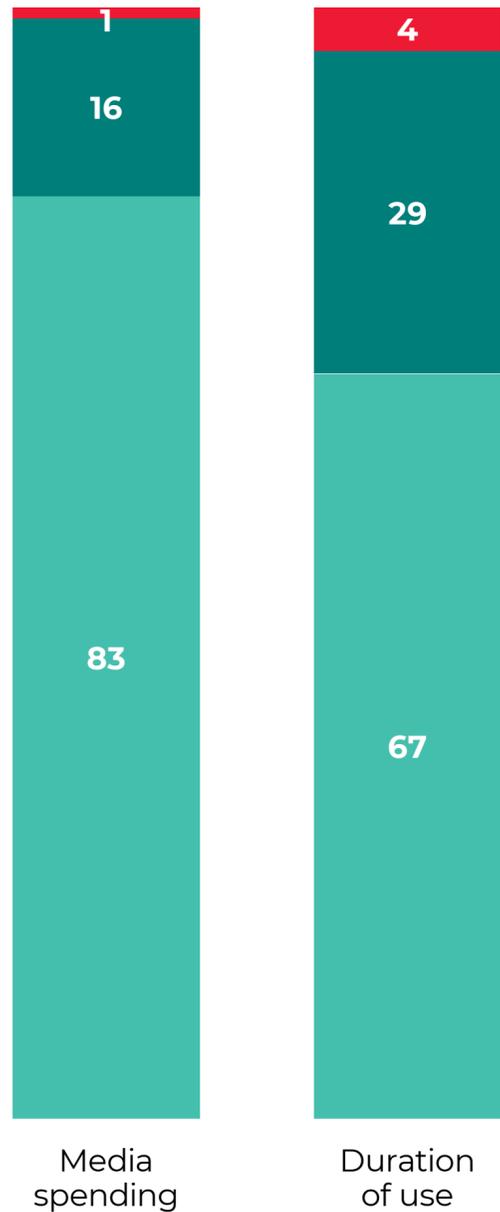
In 2025, podcasts will reach more young listeners than radio for the first time



Basis: People aged 18–29, n = approx. 600 per year
Source: ViewTime Report 2025, forsa

PODCASTS WITH UNTAPPED ADVERTISING POTENTIAL – IMBALANCE IN MEDIA SPENDING

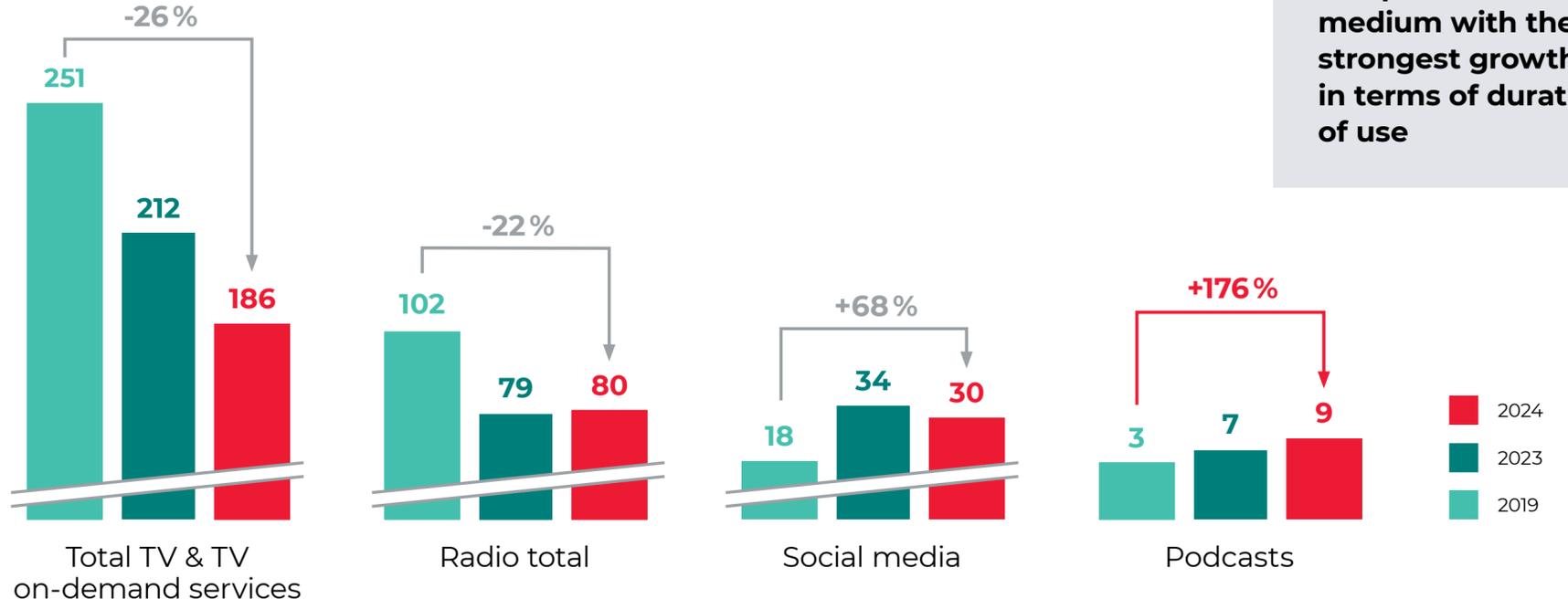
Media spending 2024 compared to daily duration of use | Figures in %



Media spending should be 4 times as high given the duration of use

- Podcasts
- Radio
- TV

Average daily duration of use | Data in minutes

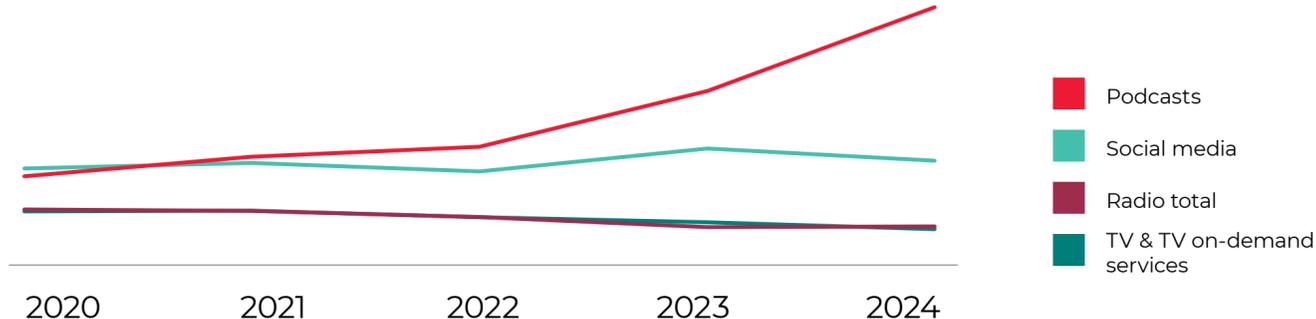


The podcast is the medium with the strongest growth in terms of duration of use

Basis: People aged 18–69; n = approx. 2,450 per wave
Source: Media Activity Guide 2024, forsa; AGF Videoforschung in cooperation with GfK; AGF SCOPE 1.5, market standard: moving images (until 2023 market standard: TV)

Growth in duration of use | Index based on 2019

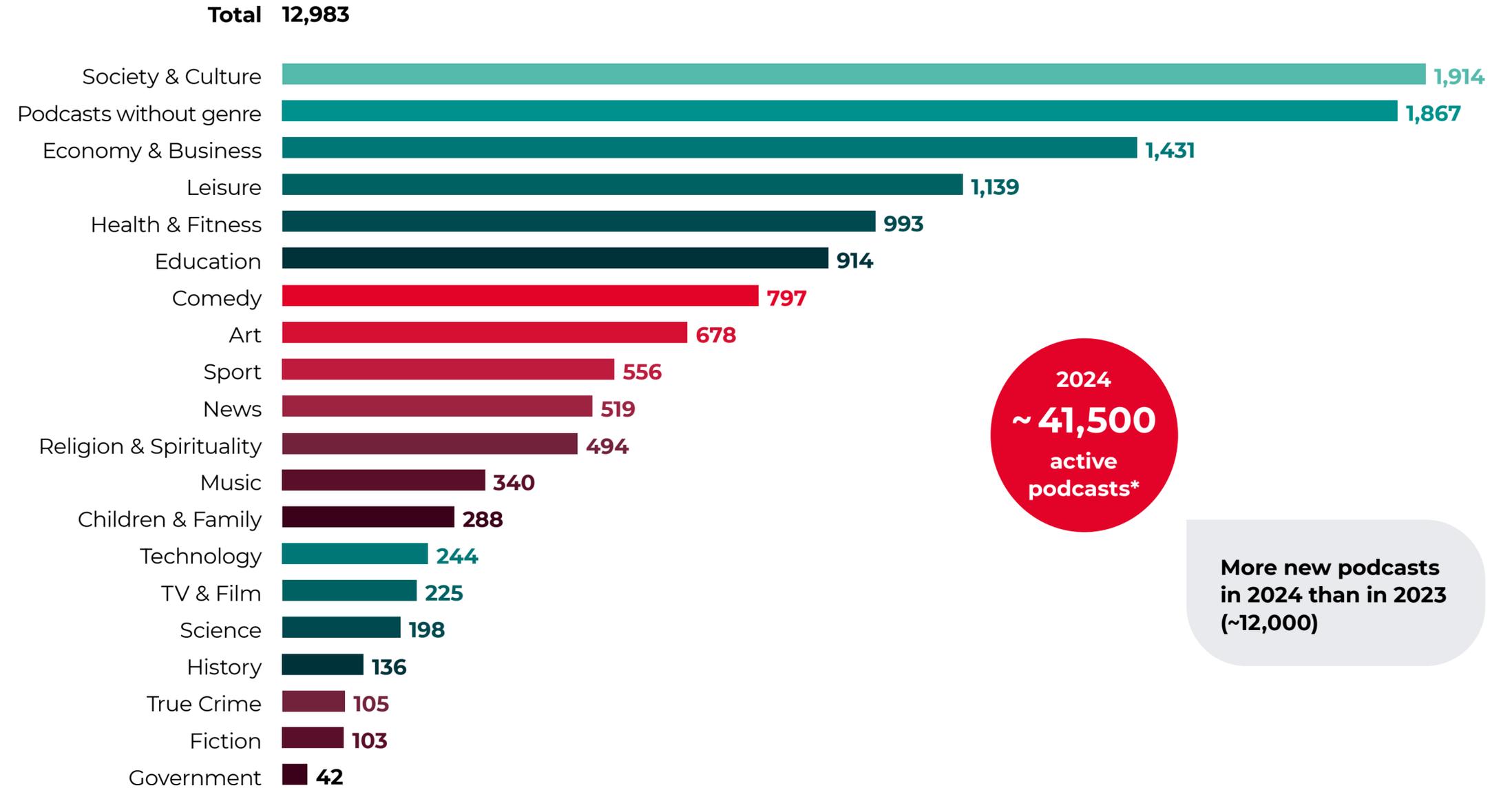
The podcast is the only medium that is continuously growing in terms of duration of use



Basis: People aged 18–69, n = approx. 2,540 per year
Source: ViewTime Report 2025, forsa



ALMOST 13,000 new PODCASTS IN 2024 ACROSS A WIDE RANGE OF GENRES



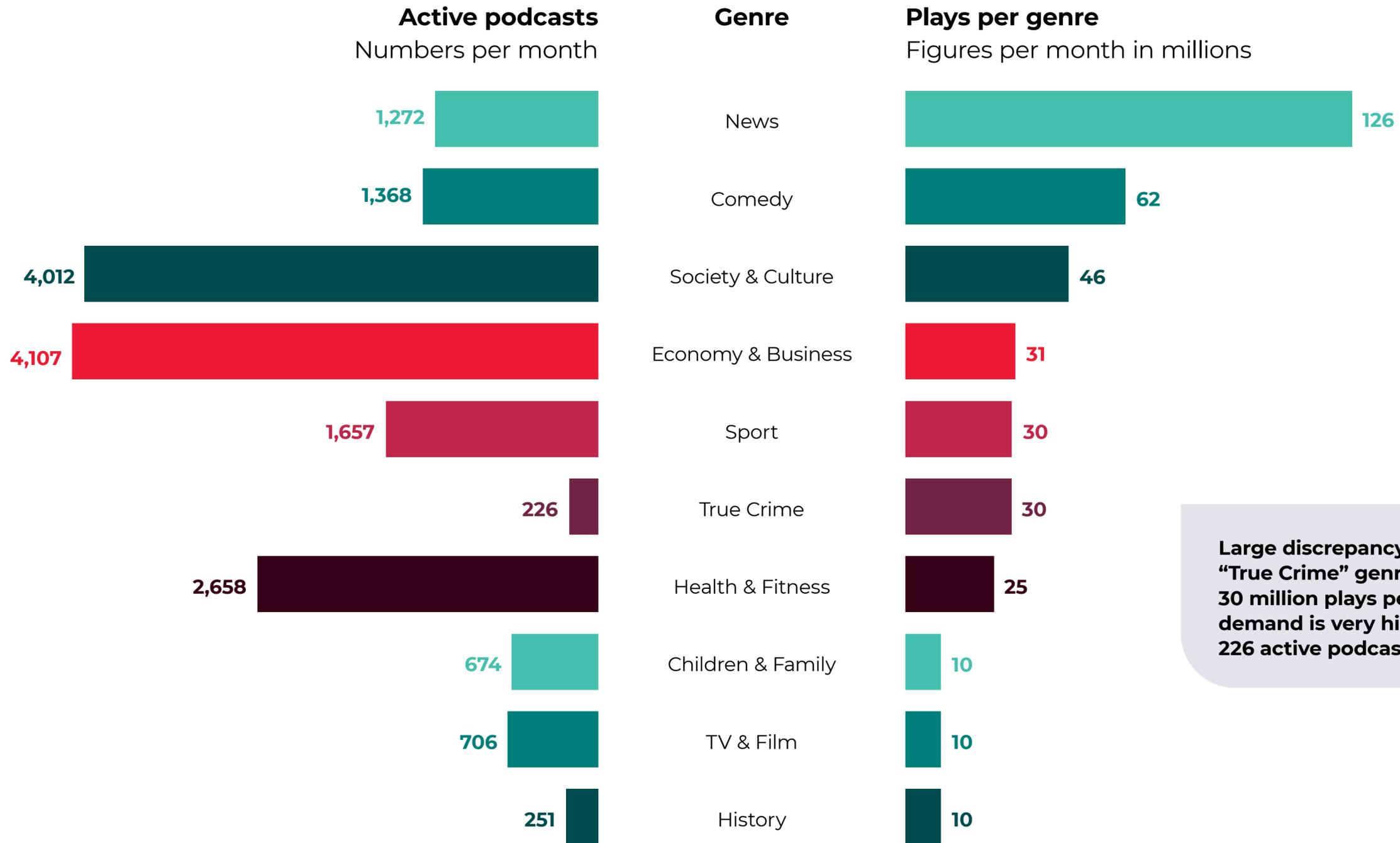
2024
~ 41,500
active
podcasts*

More new podcasts
in 2024 than in 2023
(~12,000)



Source: Podius: February 2025
The analysed plays are estimated figures; the Apple Podcast primary genre is taken into account; Spotify Exclusives are not part of the analysed plays.
* Active podcasts: formats that have published at least one episode since 23 November, 2024

MANY PLAYS, FEW PODCASTS: HUGE DISCREPANCY BETWEEN SUPPLY AND DEMAND



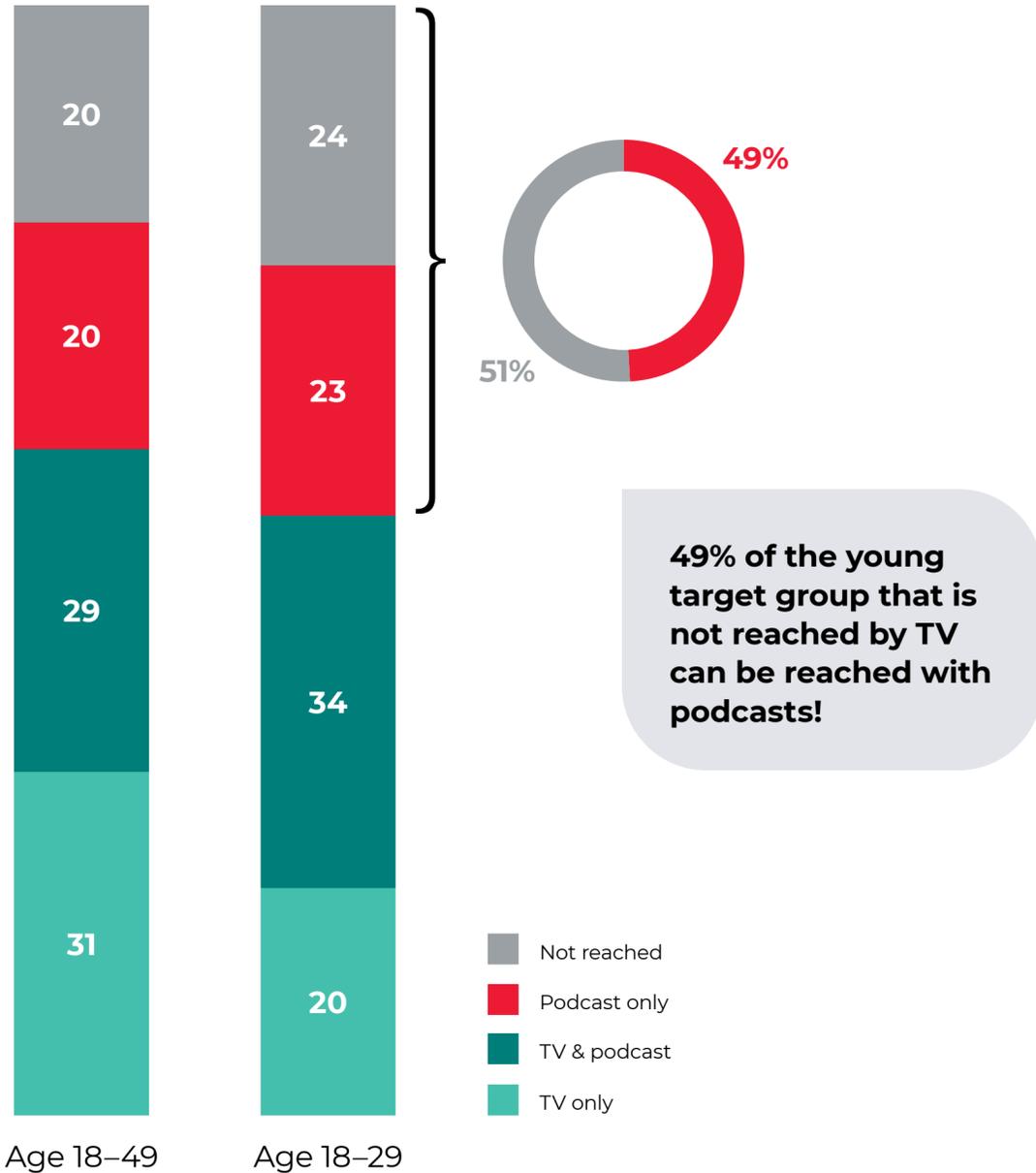
The “Economy & Business” genre comprises the largest number of active podcasts; “News” has by far the most plays

Large discrepancy in the “True Crime” genre: with 30 million plays per month, demand is very high for just 226 active podcasts

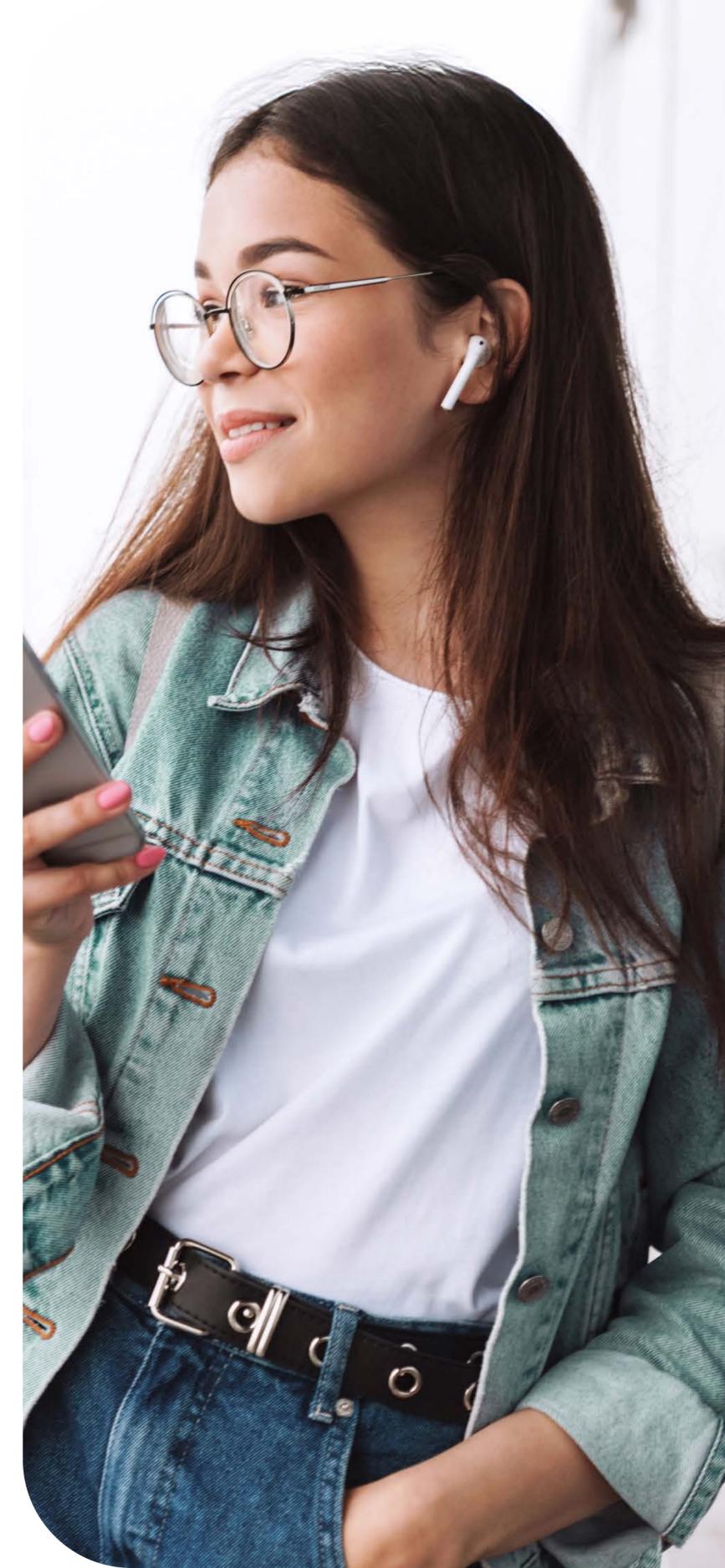
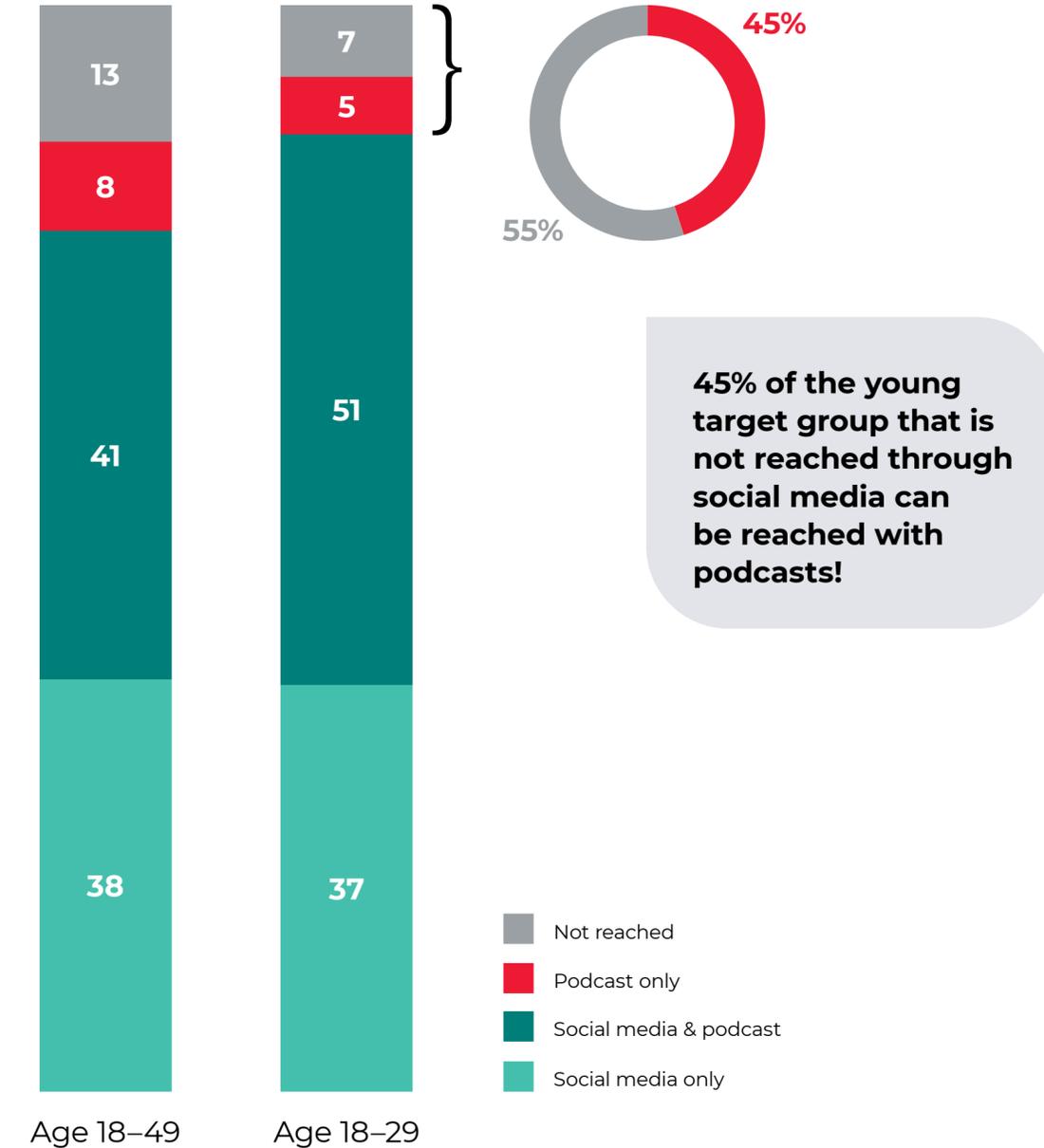
Source: Podius: February 2025
 The analysed plays are estimated figures; the Apple Podcast primary genre is taken into account; Spotify Exclusives are not part of the analysed plays.
 * Active podcasts: formats that have published at least one episode since 25 November, 2024.

PODCAST CREATES INCREMENTAL REACH IN THE YOUNG TARGET GROUP

(Incremental) reach to TV | Figures in %



(Incremental) reach to social media
Figures in %



KEY RESULTS

PODCAST MARKET

- ⊕ The popularity of podcasts **continues to grow**: daily usage is increasing in particular.
- ⊕ For the first time, the **reach of podcasts exceeds that of radio** in the young target group of ages 18–29.
- ⊕ The advertising spend on podcasts **is well behind TV and social media** in relation to duration of use.
- ⊕ The podcast is the only medium **that has grown continuously** in terms of duration of use since 2019.
- ⊕ Podcasts create **incremental reach**, both to TV and to social media.





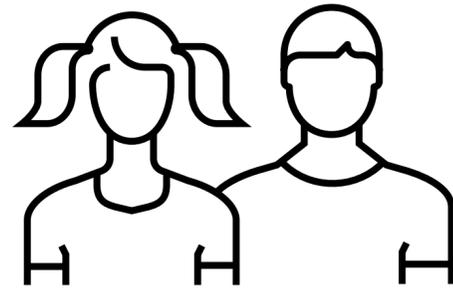
Usage Habits of Podcast Listeners

PODCASTS CONTINUE TO REACH A PARTICULARLY **YOUNG,** **educated** and **HIGH-INCOME** TARGET GROUP

Selected examples of podcast users



Educated



Young



High income



67% of the listeners of
"TRUE LOVE"
have a **university
entrance qualification
(Abitur)**



43% of the listeners
of "Geschichten aus
der Geschichte"
have a **university
degree**



53% of the listeners
of "dudes." are **high
school students,
college students or
apprentices**



89% of the listeners of
"Copa TS"
are **employed**



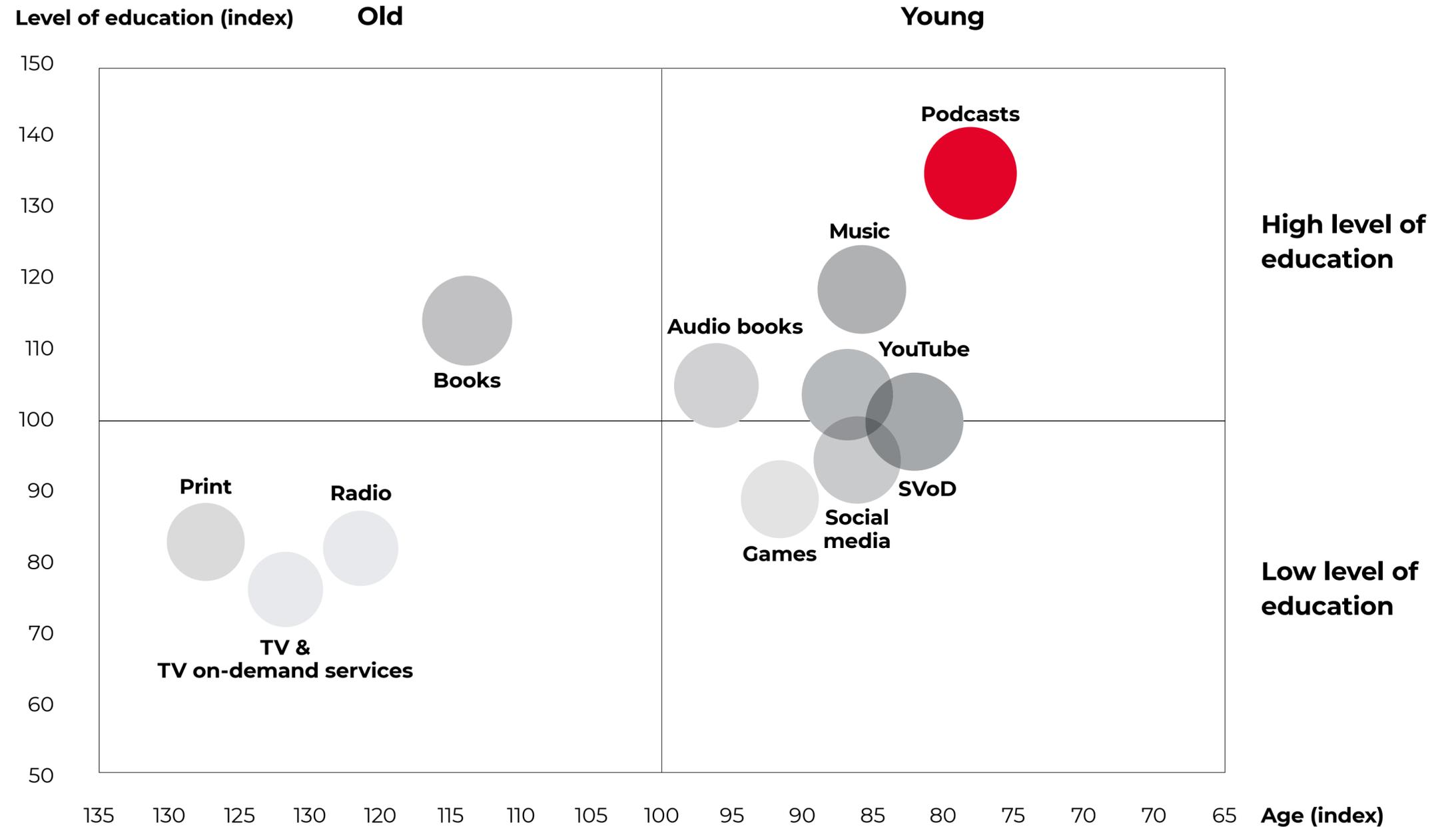
54% of the listeners of
"Hazel Thomas Hörerlebnis"
have a net household
income **of more than
€5,000 per month**





THE PODCAST TARGET GROUP IS UNIQUE

Figures in indices, district size = index household net income



Basis: People aged 18–69, n = 2,555
Source: Media Activity Guide, forsa

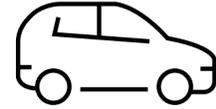
PODCASTS ARE LISTENED TO IN A WIDE VARIETY OF SITUATIONS – MOST FREQUENTLY AT HOME AND IN THE CAR

Usage situations during podcast listening | Figures in %



63%

at home, e.g.
doing housework



57%

in the car



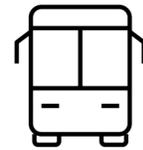
39%

on foot



36%

to fall asleep



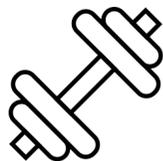
33%

on the bus/train



21%

at work



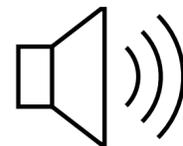
19%

doing sport



12%

while eating



10%

without doing
anything else

Versatile use:
podcasts remain a
multitasking medium



THE TOP GENRES FOR PODCAST LISTENERS ARE "COMEDY" AND "TRUE CRIME"



“Comedy” and “True Crime” are by far the frontrunners among the podcast genres. These include the podcasts “Die Nervigen”, “Baywatch Berlin”, “Mord auf Ex” and “Mordlust” from the Seven.One Audio portfolio.

The “Society & Culture” genre, which includes the podcasts “Der Sophie Passmann Podcast” and “Apokalypse & Filterkaffee” from the Seven.One Audio portfolio, is at a similar level in terms of popularity with the “Leisure” and “News & Politics” genres, followed by “Education” and “TV & Film”.

Podcasts in the Seven.One Audio portfolio



KEY RESULTS

USAGE HABITS

- ⊕ Podcasts reach the **most advertising-relevant target group of all media genres**: podcast users are **better educated, younger and have higher incomes** than all other media users.
- ⊕ Podcasts remain a **multitasking medium for 90% of the usage**: podcasts are most frequently listened to while **doing housework, in the car or on the move**.
- ⊕ The most popular genres are **“Comedy”** and **“True Crime”**, followed by “Society & Culture” and “Leisure”, which are at a similar level in terms of popularity.



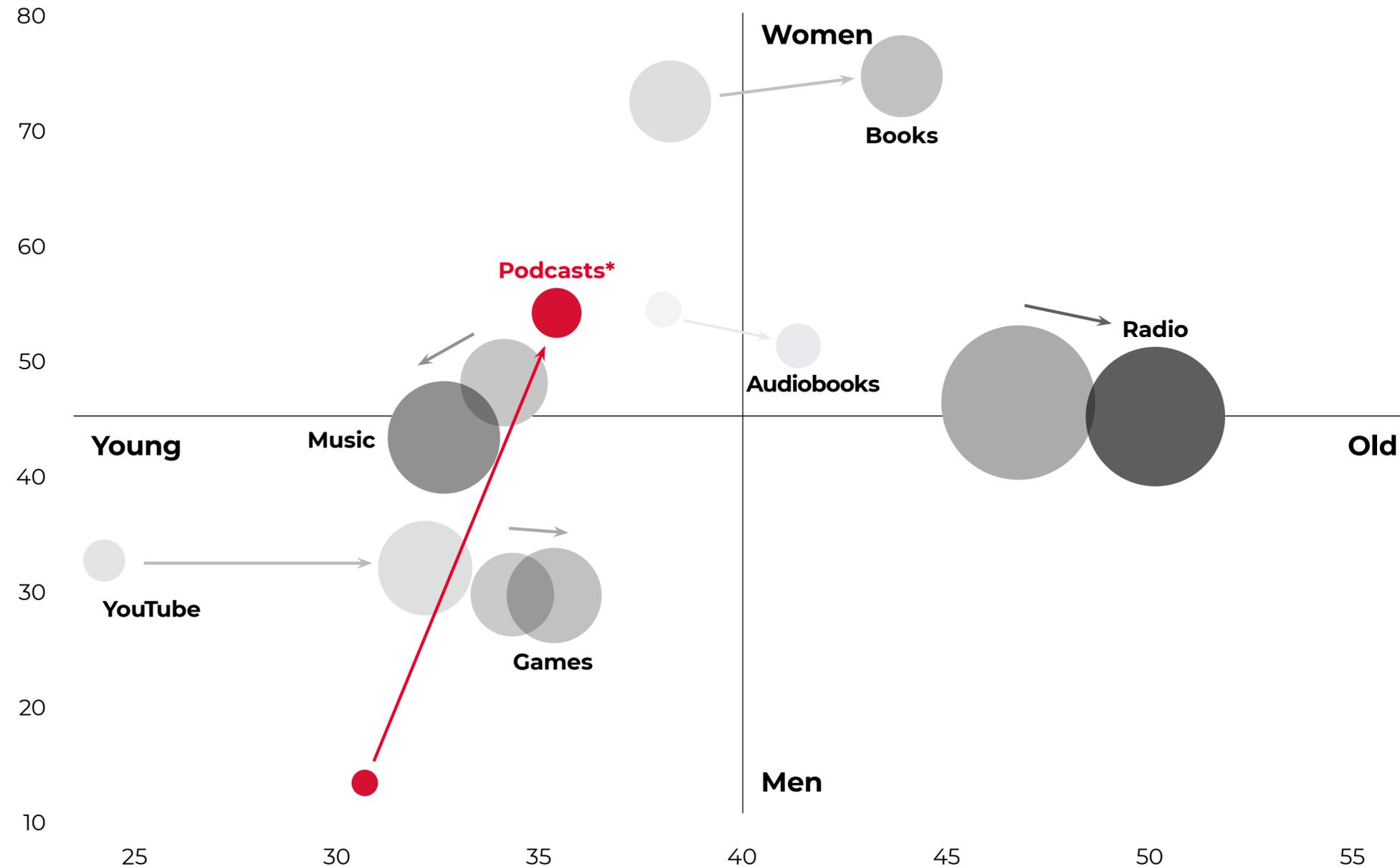


SPOTLIGHT ON:
FEMALE REACH
IN THE
PODCAST MARKET

PODCASTS HAVE CLEARLY REPOSITIONED THEMSELVES IN THE LAST 6 YEARS – FROM A MORE MALE-ORIENTED MEDIUM TO HIGH-QUALITY FEMALE REACH!

Development of user structure in non-video media 2015–2025 YTD

Avg. age & share of female users in % (each weighted by duration of use), circle size = avg. duration of use



Among all non-video media, podcasts have undergone **the most significant shift in user composition** and have developed into **a broadly established medium**. The proportion of the duration of use generated by women in particular **has grown sharply** and will account for over half of total duration of use in 2025.

Podcasts are also increasingly being used by an older target group. At the same time, young listeners **have remained loyal to the medium** and have been listening to podcasts for several years.

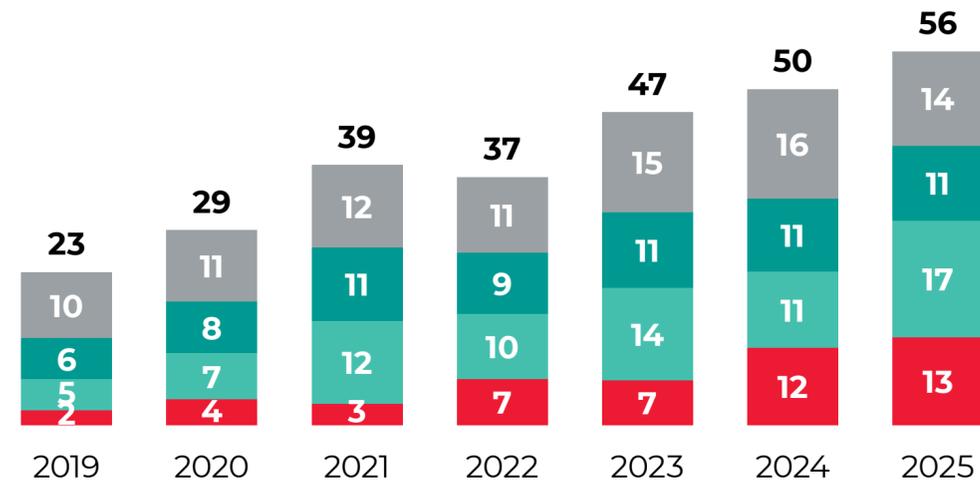
* Starting point: 2019
 Basis: Persons aged 18–69, n = 2,440 per year, TV AGF adjusted
 Source: Media Activity Guide, forsa, AGF Videoforschung in cooperation with GfK; AGF SCOPE 1.5, market standard: moving image

USAGE FREQUENCY AND REACH ARE RISING SHARPLY – 81% OF YOUNG WOMEN CAN BE REACHED THROUGH PODCASTS

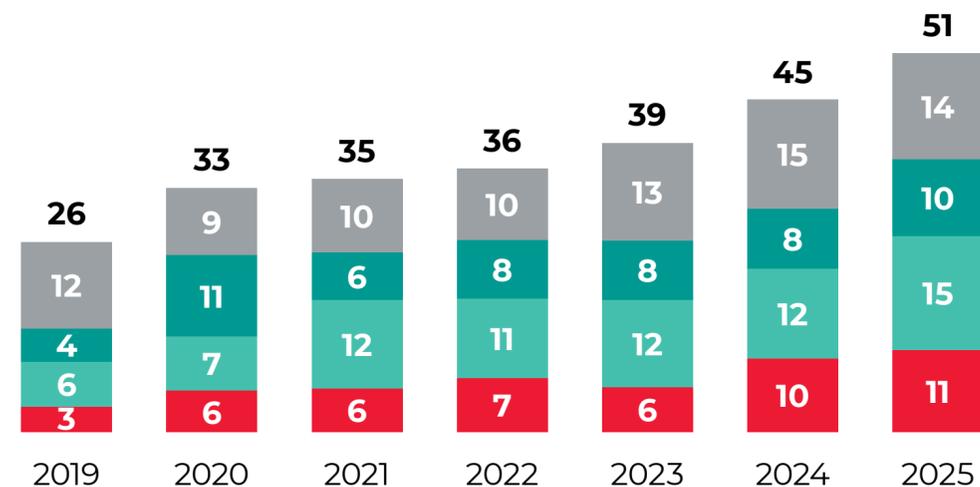
Frequency of use for women vs. men

Figures in %

Women



Men



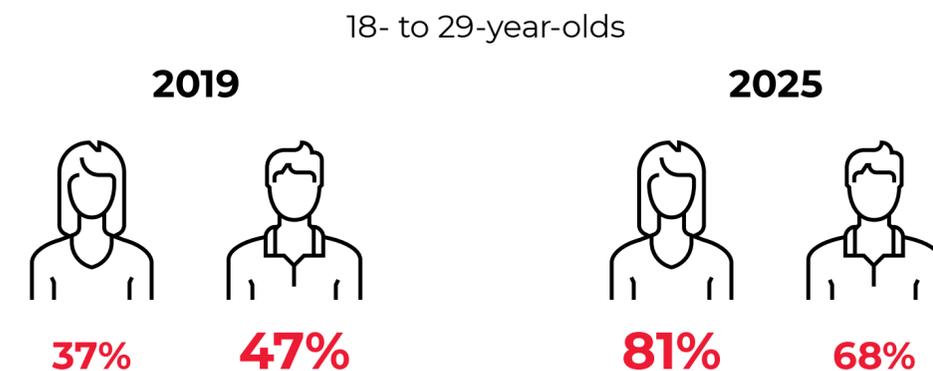
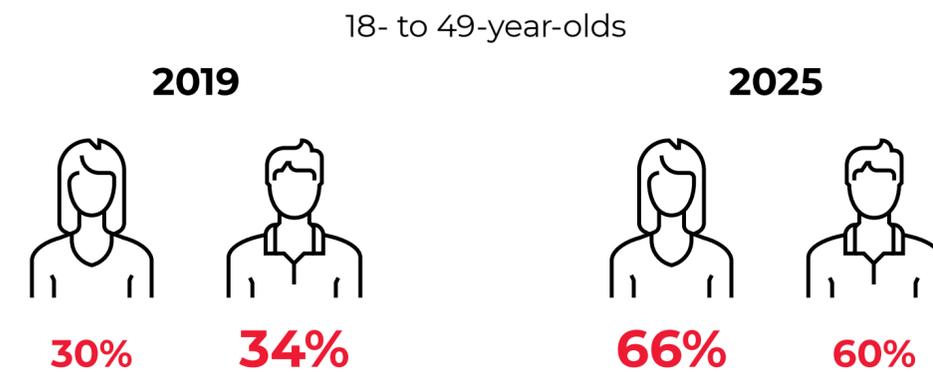
Daily listening is rising especially sharply among female listeners compared to their male counterparts

- Almost daily
- At least once a week
- At least once a month
- Less often

Reach development for women vs. men

At least occasional use

A comparison with male listeners shows that reach among women is increasing significantly – and in 2025, podcasts are reaching more women than men



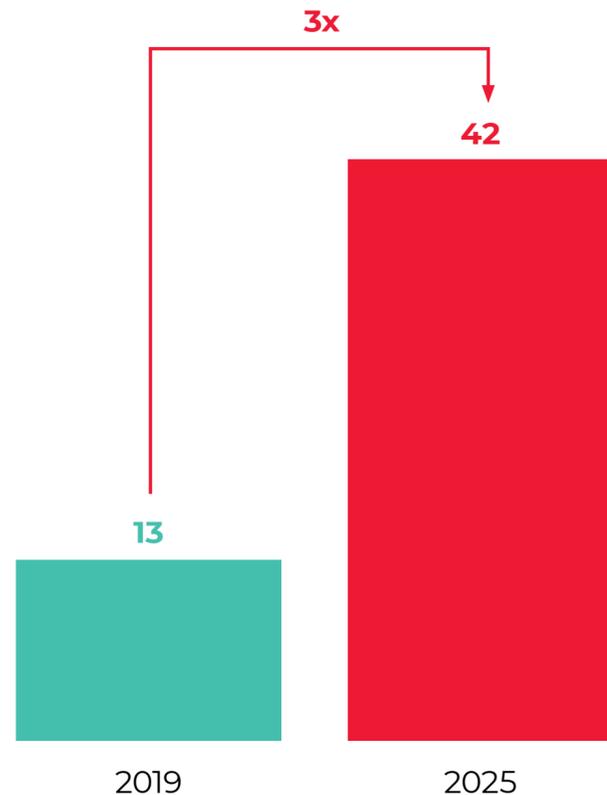
Basis: People aged 18–69, n = approx. 1,110 per year
Source: ViewTime Report 2025, forsa

MONTHLY USAGE BY FEMALE LISTENERS **TRIPLED** FROM 2019 TO 2025 – TOP GENRES ARE “COMEDY” AND “TRUE CRIME”

Use at least monthly by female listeners

Figures in %

Nearly half of women (42%) listen to podcasts monthly or more frequently, more than tripling since 2019. Female listeners are generally young, well educated and financially strong

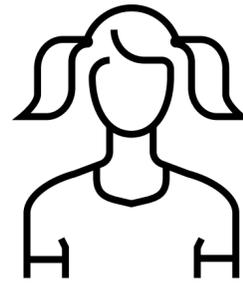


Female users at a glance



Educated

47% have a university entrance qualification (Abitur) or a university degree



Young

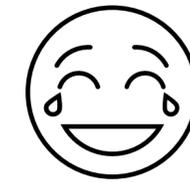
32% are between 14 and 29 years old



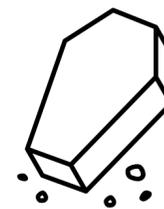
High income

37% have a monthly net household income of €4,000 or more

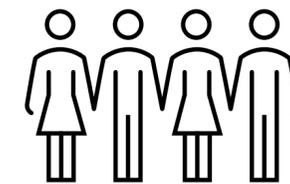
Top 4 genres listened to



35%
Comedy



28%
True Crime



27%
Society & Culture



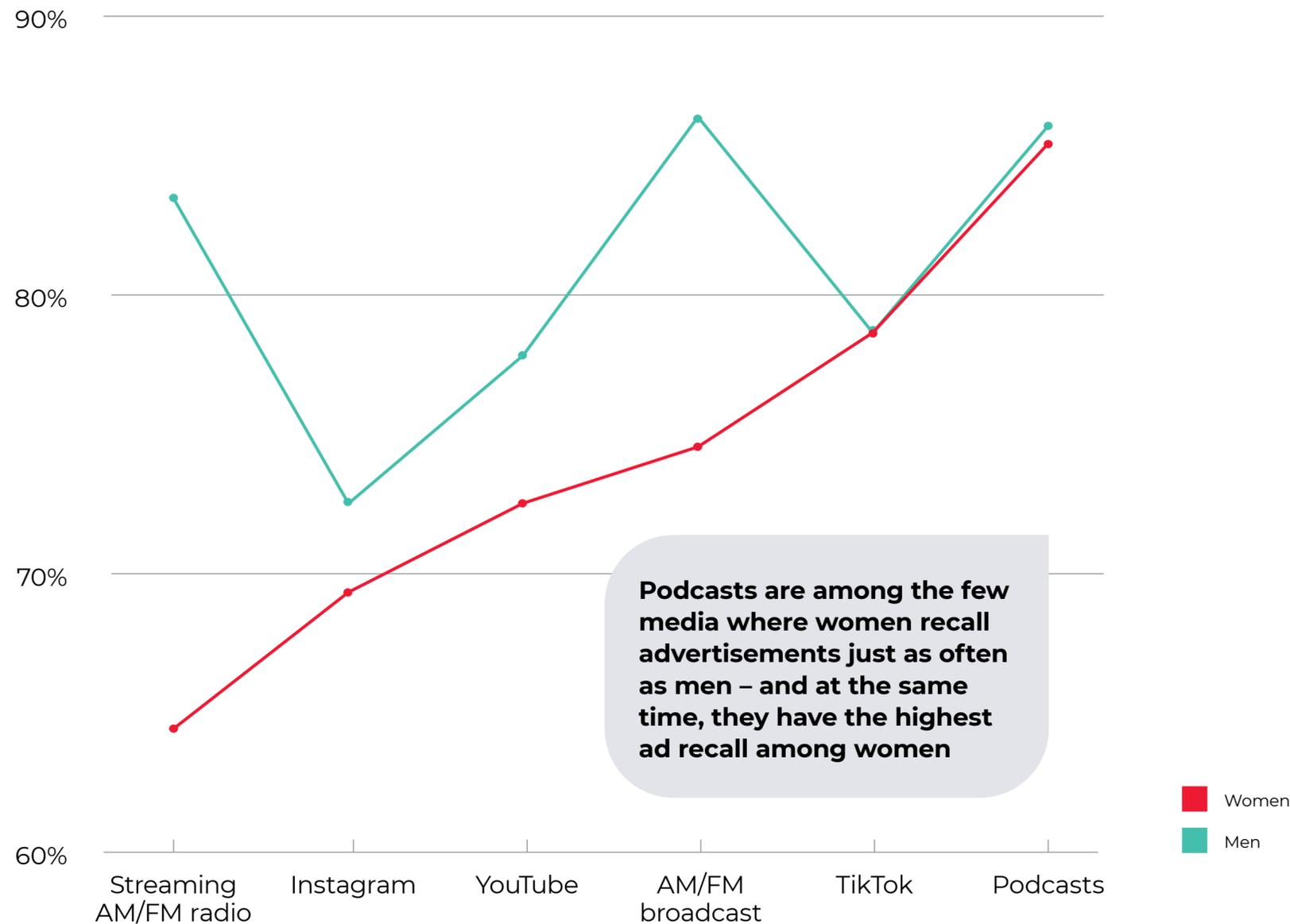
22%
Health & Fitness

Women have a wide range of interests: the top genre is “Comedy”, closely followed by “True Crime”, “Society & Culture” and “Health & Fitness”

ADVERTISING EFFECTIVENESS AMONG WOMEN: RECALL AND AUTHENTICITY COMPARED ACROSS MEDIA

Differences in ad recall between men and women by medium

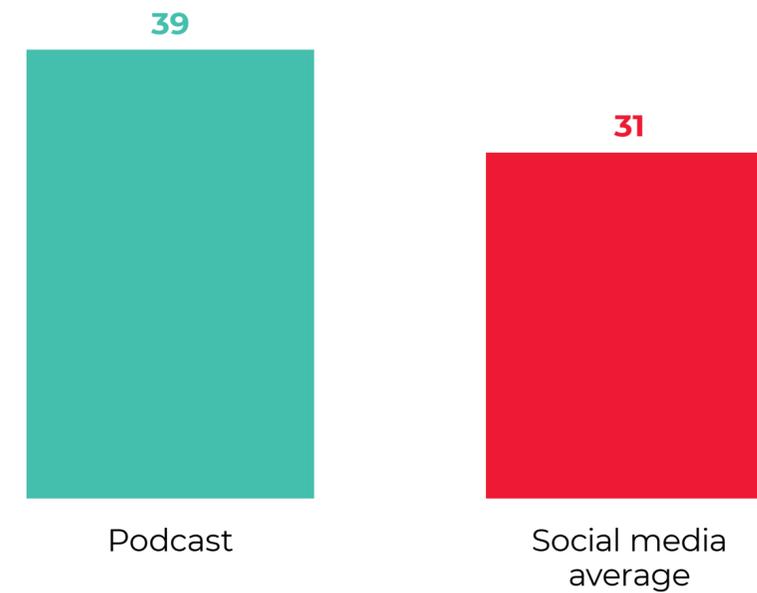
Percentage of respondents who reported seeing or hearing advertisements on the following media in the past 7 days



Basis: Users aged 18+ who include the medium among their top 4 ad-supported media and use it daily or nearly daily, n = 5,005
Source: Sounds Profitable 2025

Women perceive podcast advertising as significantly more authentic than social media advertising.

Figures in %



Basis: Female users aged 18+ who include the medium among their top 4 ad-supported media and use it daily or nearly daily, n = 5,005
Source: Sounds Profitable 2025

Women **rate the authenticity of advertising in podcasts on average 8 percentage points higher** than on social media. Due to the close connection to the hosts, who are perceived as approachable and trustworthy, a high level of trust is established. This makes podcasts a **particularly effective medium for reaching female target audiences.**

KEY RESULTS

FEMALE REACH

- ⊕ The user structure of podcasts **has changed the most:** they have repositioned themselves from a medium predominantly used by men to one with a **predominantly female share of usage.**
- ⊕ **81%** of young women can be reached through podcasts – compared to 37% in 2019.
- ⊕ Monthly use of podcasts by female listeners has **more than tripled** in the last 6 years.
- ⊕ Women have a **wide range of interests:** the top genre is **“Comedy”**, closely followed by **“True Crime”**, “Society & Culture” and “Health & Fitness”.
- ⊕ Compared to men, **women remember and trust** podcast advertising **more.**



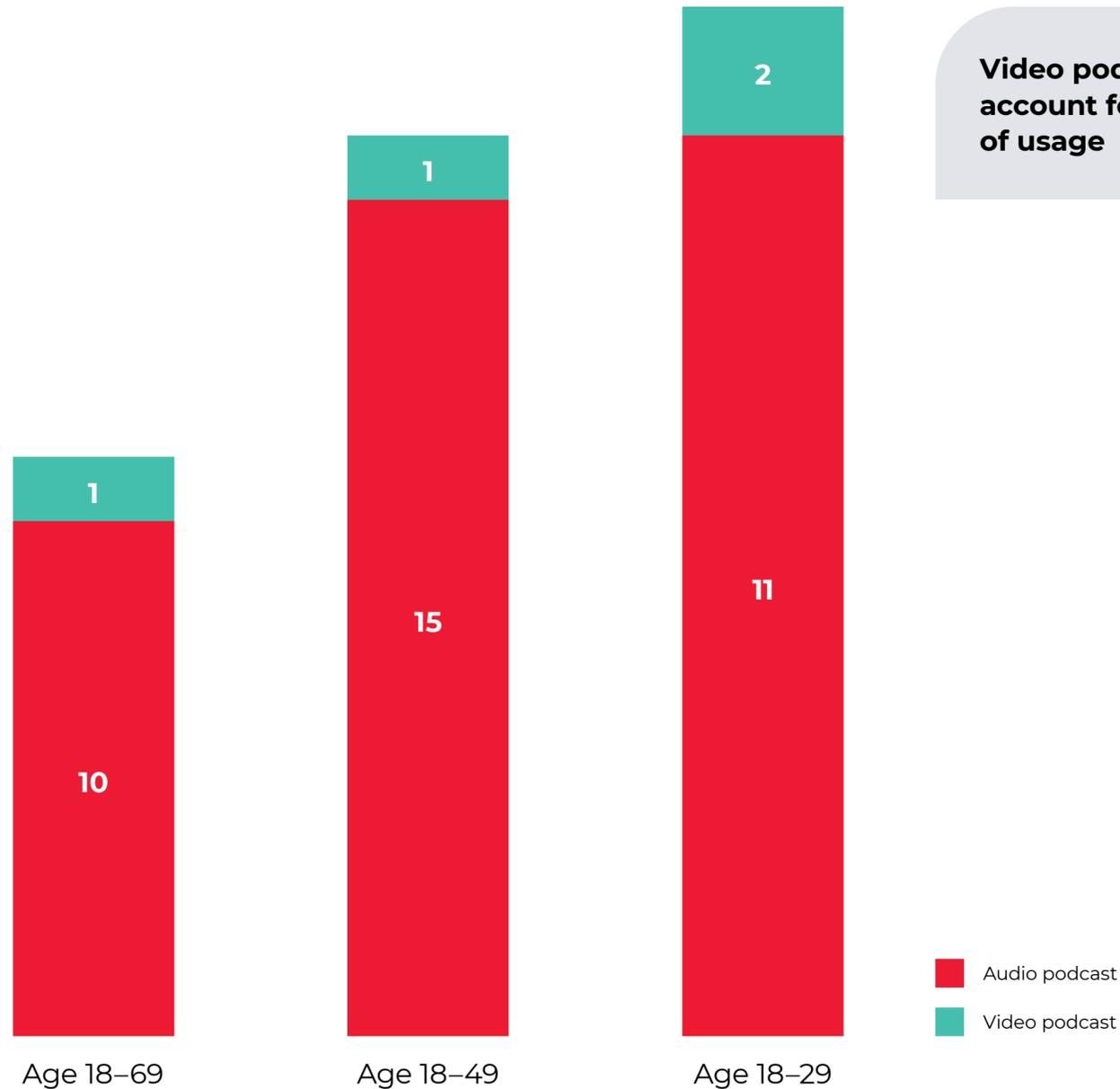


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AUDIO PODCASTS: HERE TO STAY

A SMALL PROPORTION OF THE PODCASTS ARE PUBLISHED WITH VIDEO

Average daily podcast duration of use: audio & video
Data in minutes



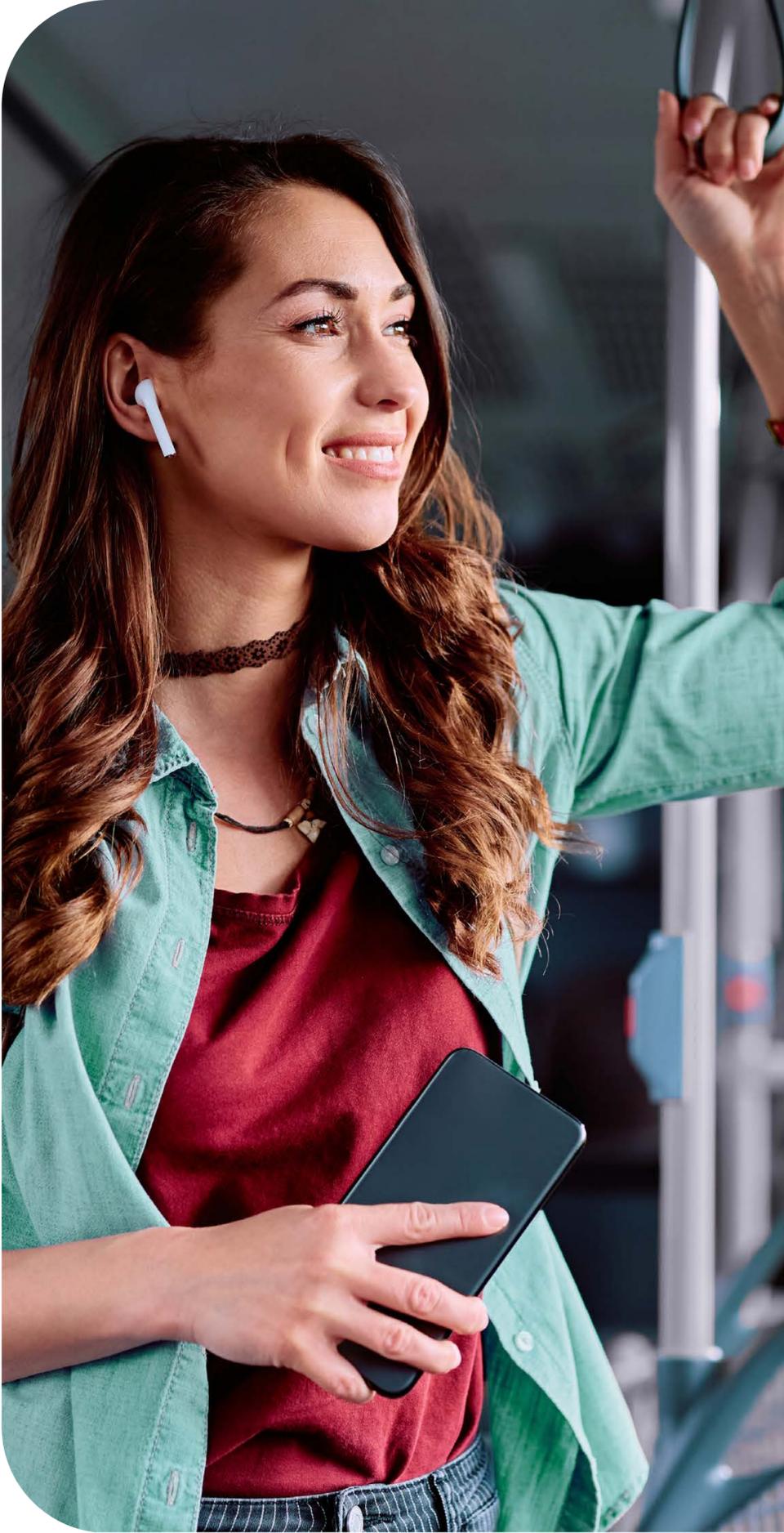
Video podcasts account for 9% of usage

3%

of all active podcasts are video podcasts

12%

have at least one video episode



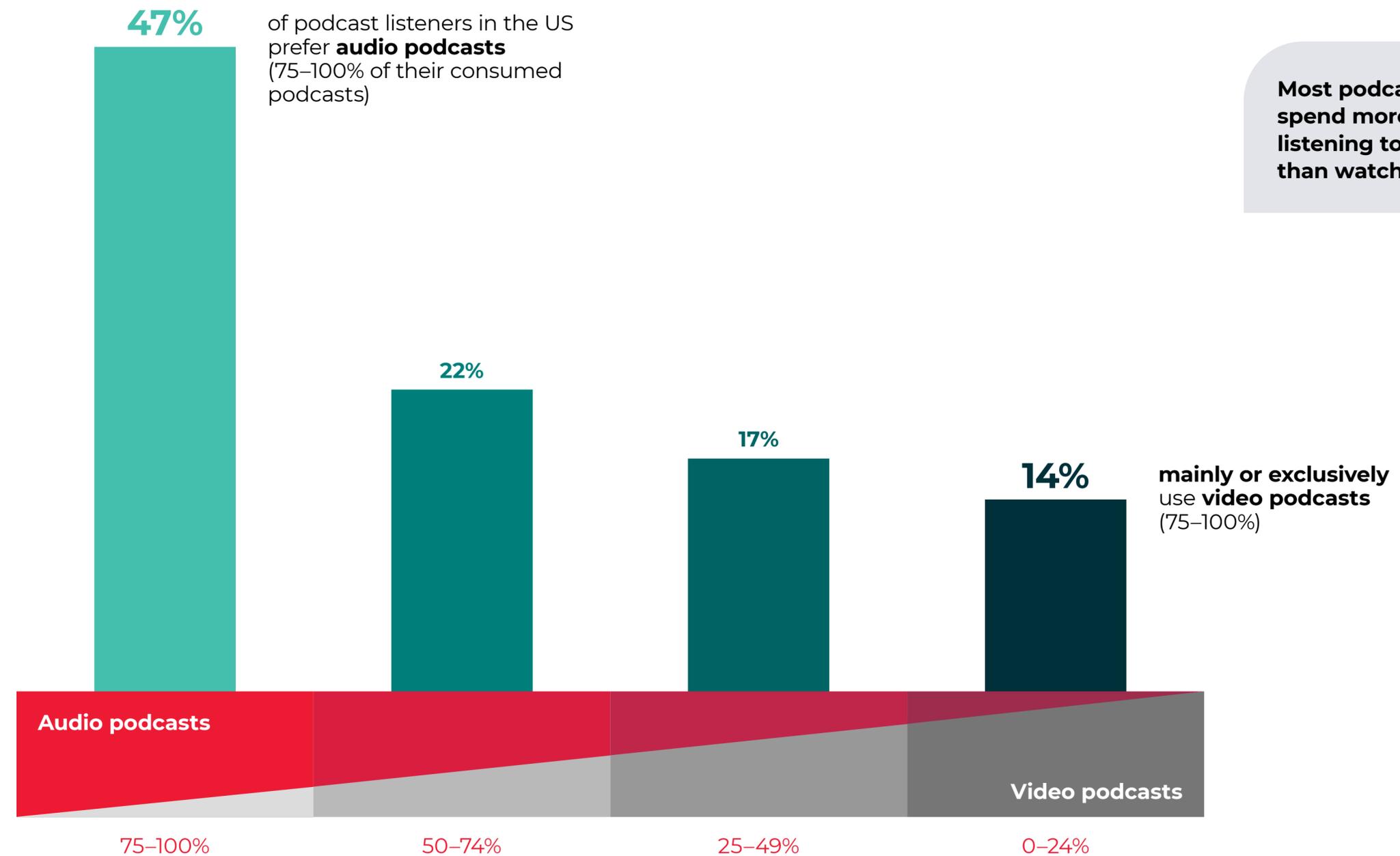
Basis: People aged 18-69, n = 2,555
Source: ViewTime Report 2025, forsa

Source: Podius, December 2024

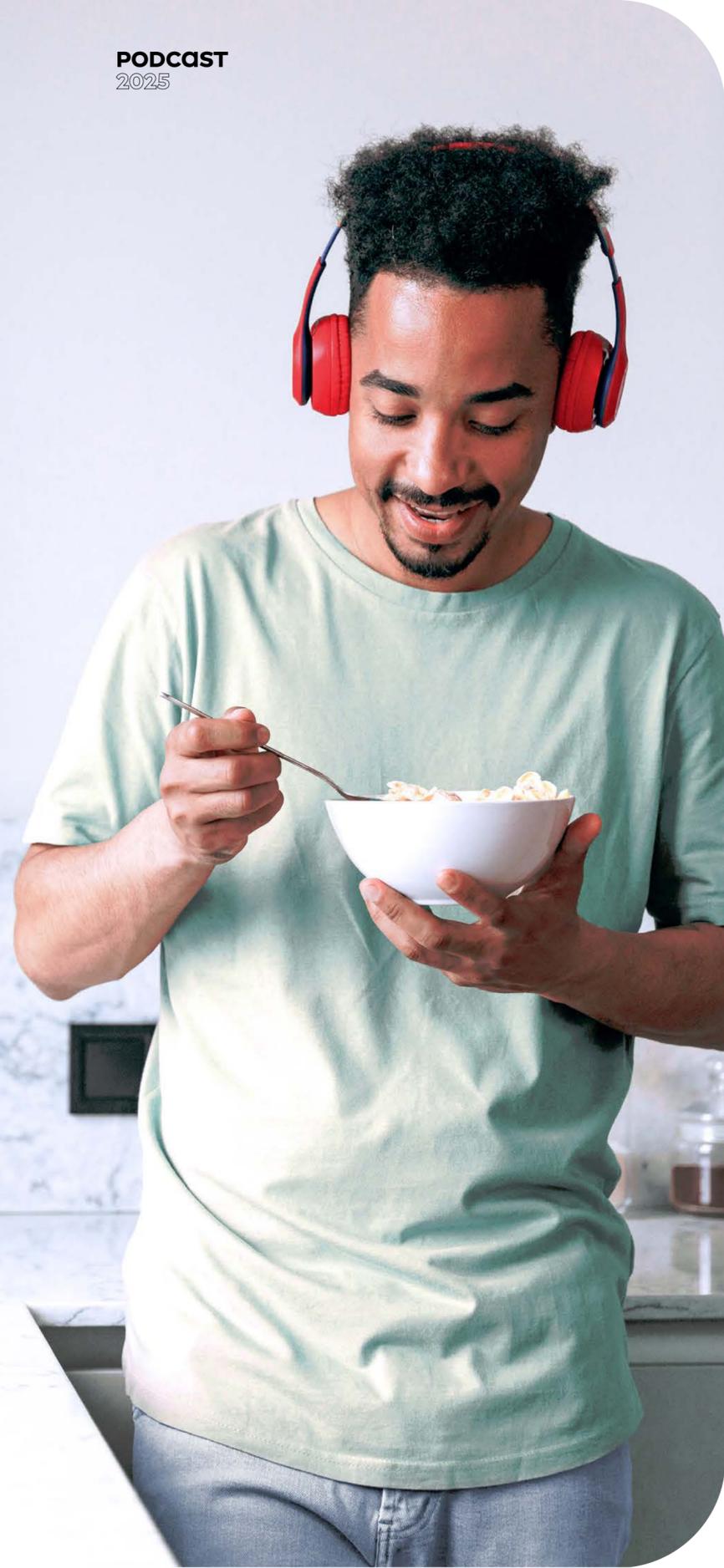


A LOOK AT THE USA: AUDIO REMAINS THE **PRIMARY FORM** OF PODCAST CONSUMPTION

Share of the population in relation to the share of video podcasts consumed | Figures in %



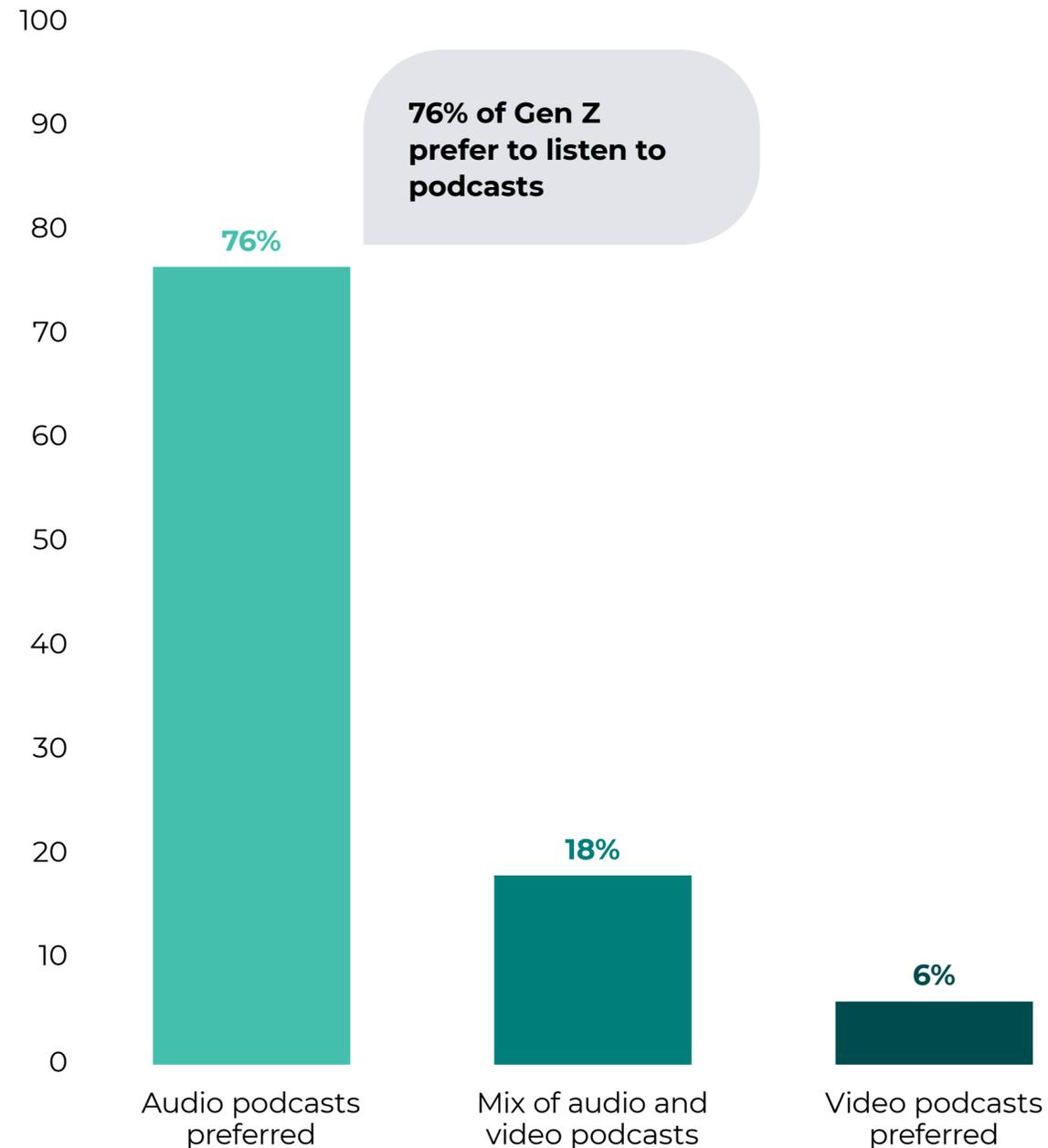
Basis: 18+ years old, n = 5,071
Source: Sounds Profitable 2024





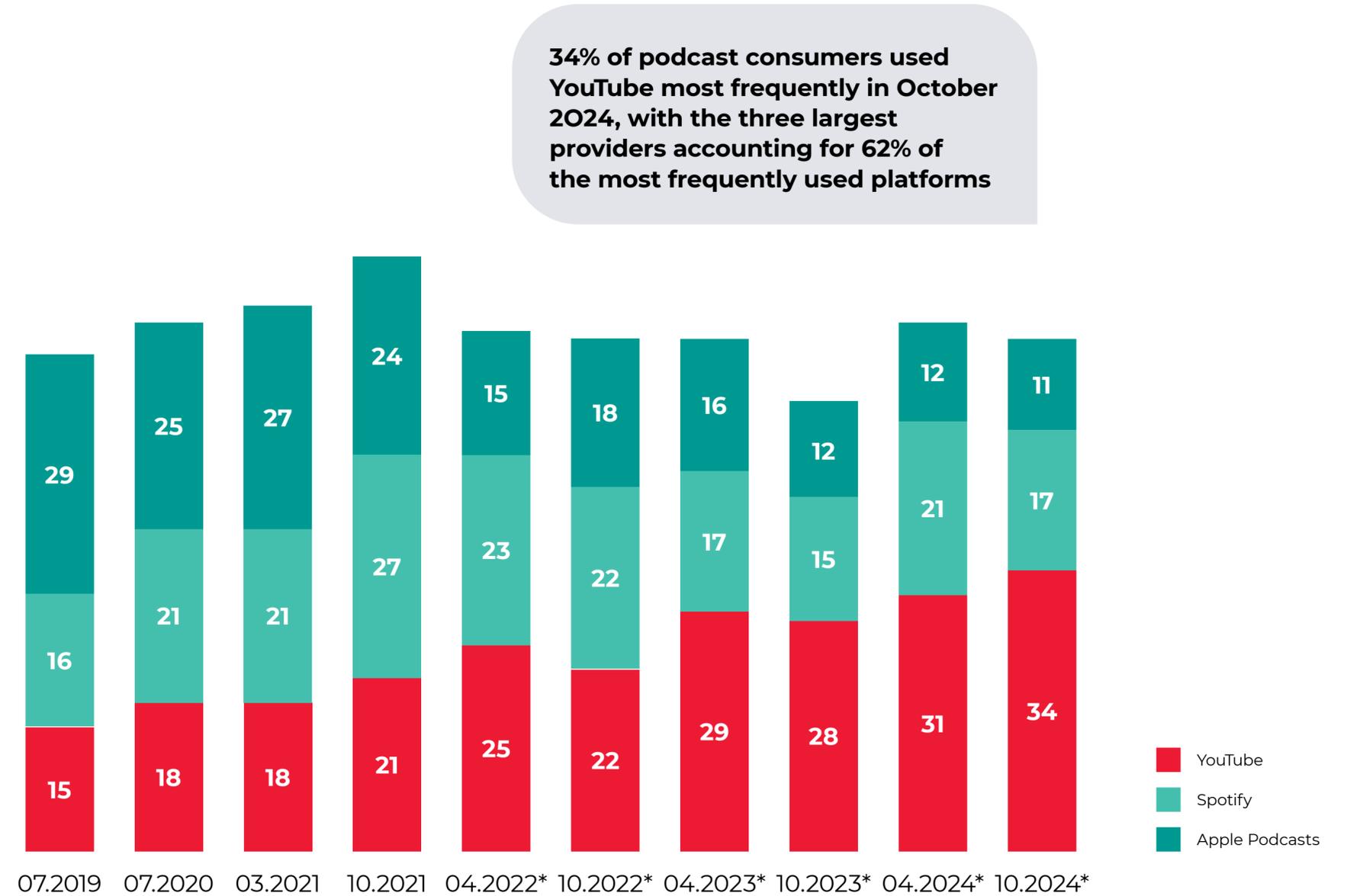
A LOOK AT THE USA: AUDIO IS ALSO THE MOST POPULAR WAY TO CONSUME PODCASTS AMONG GEN Z, YOUTUBE IS GROWING SHARPLY

Podcast usage preference of Gen Z | Figures in %



Podcast consumption on YouTube, Spotify and Apple Podcasts (2019–2024)

Figures in % per week



Basis: People aged 15–29, n = 102
Source: Transistor 2025

* Survey data from April 2022 onwards also includes users who consume video podcasts weekly in addition to audio podcasts (accounting for 13%).
Source: Cumulus Media and Signal Hill Insights' Podcast Download – Fall 2024 Report, Cumulus Media, MARU/Matchbox National Study – October 2024

KEY RESULTS

VIDEO PODCASTS

- ⊕ Video podcasts still play a **minor role** in overall usage.
- ⊕ The younger generation continues to prefer consuming **podcasts in audio format**.
- ⊕ In recent years, **YouTube** has become the **most popular platform for podcast consumption** in the US, with 34% of users naming it as their primary platform in 2024.



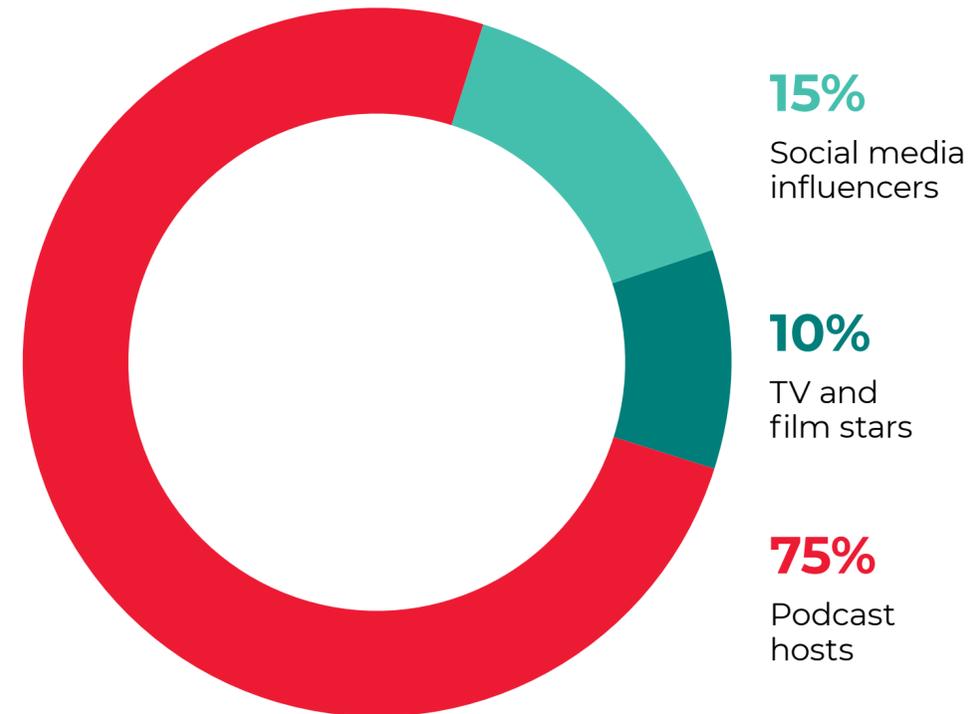


MASTERING THE **HOST-READ AD -** LISTENER ACCEPTANCE AND ADVERTISING EFFECTIVENESS



PODCAST HOSTS ARE MORE INFLUENTIAL THAN SOCIAL MEDIA INFLUENCERS – ACROSS ALL AGE GROUPS

Influence of podcast hosts, social media influencers and celebrities | Figures in %

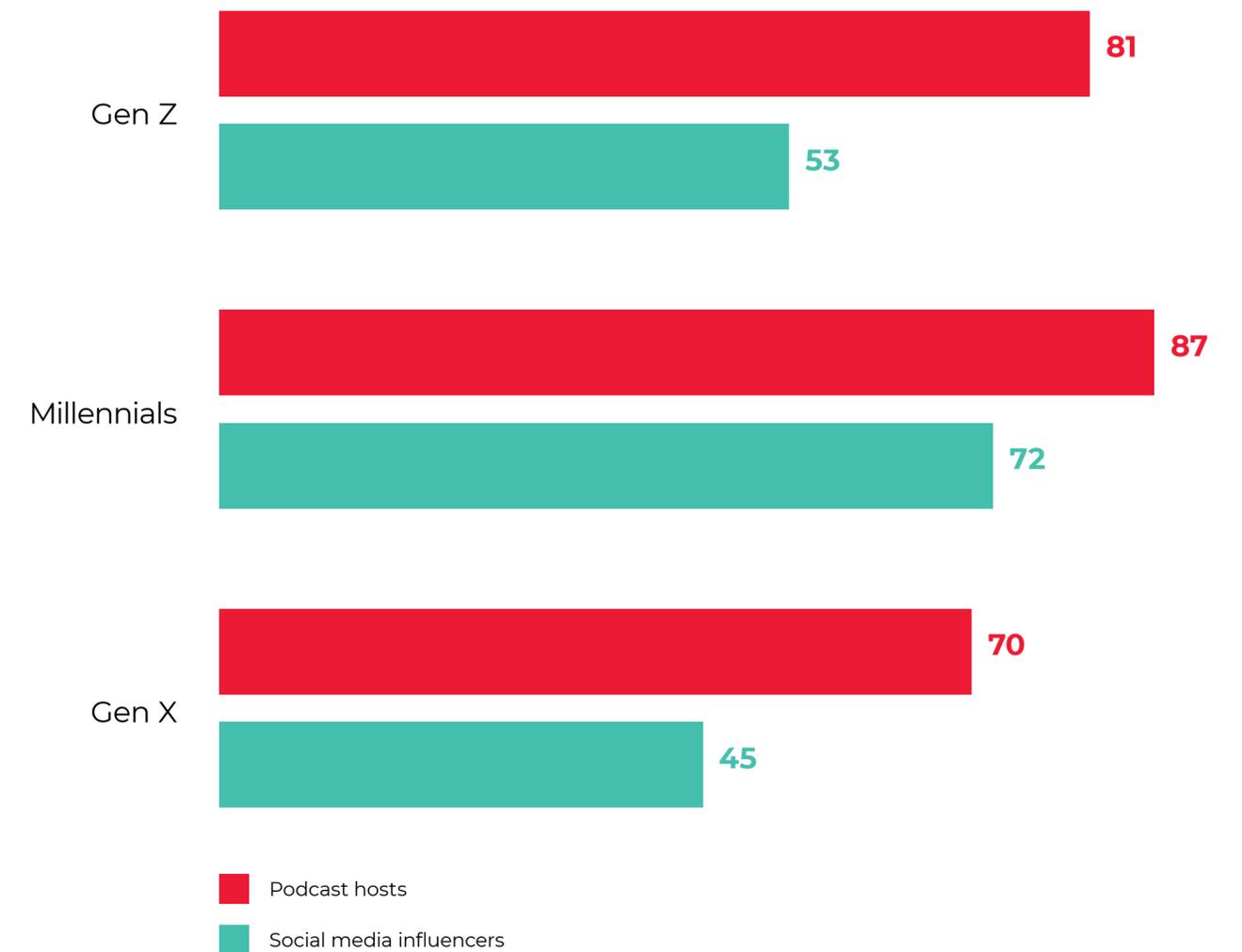


For 75% of listeners, the opinion of podcast hosts is most important

Basis: n = 2,028
Source: Vox Media, 2023

The impact of podcast hosts and social media influencers
Figures in %

How often have you changed your mind about something you used to believe in? | Per generation (very often/frequently)

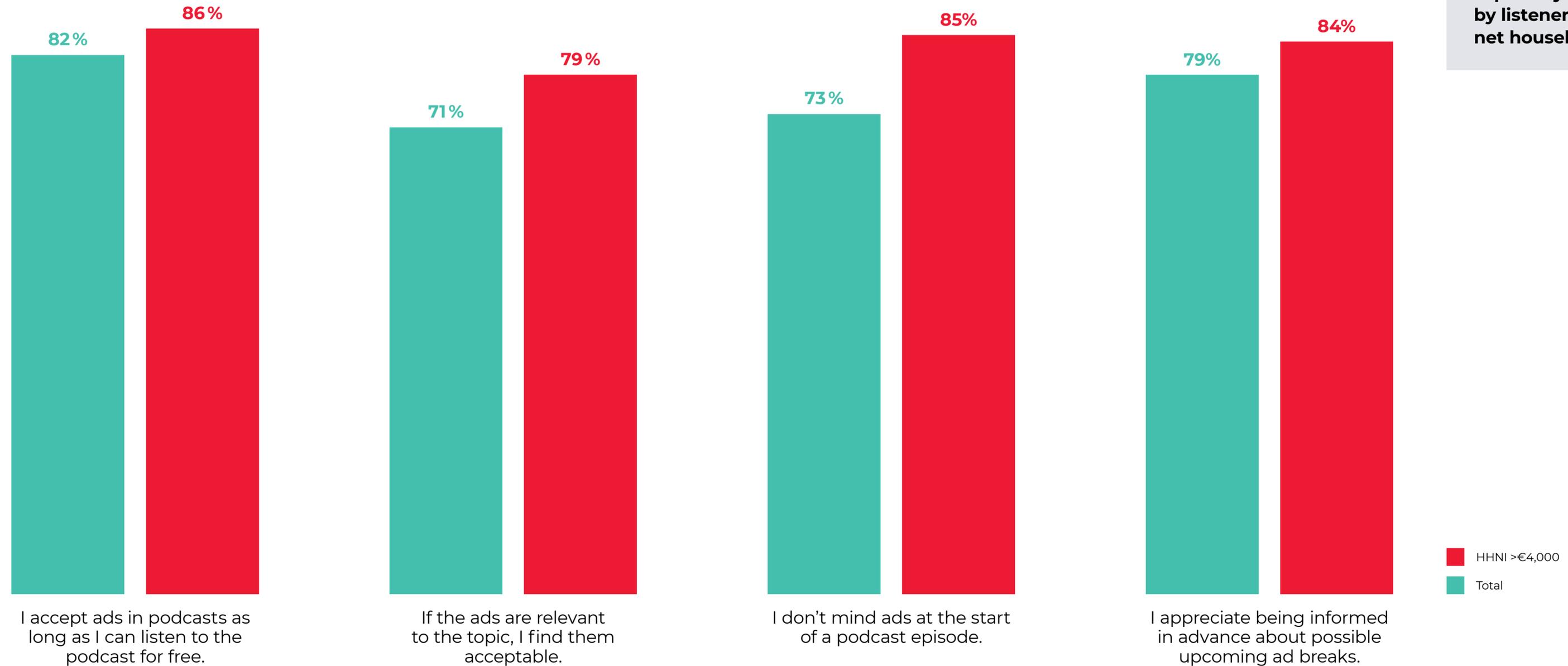


Basis: n = Adult Gen Z: 624; Millennials: 589; Gen X: 427
Source: Vox Media, 2023

PODCASTS ARE A TRUSTED ADVERTISING ENVIRONMENT – ESPECIALLY AMONG HIGH-INCOME AUDIENCES

Statements on podcast advertising and audience approval

Figures in %



Podcast advertising is especially well received by listeners with high net household incomes

Basis: User sample n = 651; Statements: Top 2 Boxes
Source: b4p trends 2024 I

CASE STUDY SHOWS: WILLINGNESS TO USE, AD RECALL AND BRAND IMAGE CAN BE SIGNIFICANTLY ENHANCED THROUGH PODCAST ADVERTISING

Podcast ad for payment provider on “Baywatch Berlin” | February 2025



“Smooth payment experience is the magic phrase”

“If you know [payment provider] is the middleman then **you can simply rely on them** [...], [payment provider] provides a **secure feeling**”

Provider image

Uplift compared to baseline measurement (Top 2)



“safe”



“flexible payment options”



“simple and fast payment procedure”

Impact of the advertising campaign

Uplift compared to baseline measurement

Willingness to use the payment provider



Aided ad recall for the payment provider



KEY RESULTS

ADVERTISING IMPACT

- ⊕ Podcast hosts are perceived as **more influential** than social media influencers **across all age groups**.
- ⊕ Podcast advertising is particularly well received by **users with high net household incomes**.
- ⊕ Podcast advertising increases both **willingness to engage** and **aided ad recall**, and has a **positive effect on brand image**.



PODCAST STUDY 2024 BY SEVEN.ONE ADFACTORY

Client

Seven.One Audio

Conducted by

Seven.One Advertising and Media Research

Population

Adults aged 18 and older who listen to podcasts at least monthly, weighted by age and gender

Method

Online interviews using a structured questionnaire

Time Period

Baseline measurement: 31 July – 7 August, 2024
Final measurement: 29 August – 5 September, 2024

Sample Size

Baseline: Regular listeners: n = 81 // Non-listeners: n = 338
Final: Regular listeners: n = 81 // Non-listeners: n = 338

Measures

Demographics, most-listened-to podcasts, podcast evaluation, unaided ad recall, aided ad recall, relevance to the podcast, willingness to use, Klarna-related statements

MEDIA ACTIVITY GUIDE & VIEWTIME REPORT

Client

Seven.One Media GmbH

Conducted by

Forsa, Society for Social Research and Statistical Analysis Ltd.

Population

German-speaking population aged 14 and older in households with landline or mobile phones, Germany

Survey Method

Telephone interviews (CATI), dual-frame design following ADM recommendations (70% landline, 30% mobile)

Survey Period

MAG data collected in the last 4 weeks of Q1, Monday through Sunday

Sample Size

MAG: Quarterly data for Q1
VTR: Waves (rolling average over 4 quarters)

Data Reporting

MAG: Quarterly data for Q1
VTR: Waves (rolling average over 4 quarters)

Weighting

Region, gender, age

TV Usage Data

AGF Video Research in cooperation with GfK, AGF Scope 1.7, market standard until Q4/23: TV, from Q1/24: video content

Methodological note

Due to rounding, there may be slight discrepancies in the totals.

