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Independent podcasters and owners/co-owners of small to mid-level podcast networks in Canada

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On this page

List of acronyms and abbreviations

BIPOC	Black, Indigenous, People of Color
CMF	Canada Media Fund
COVID-19	Coronavirus Disease
CPM	Cost per mille
LGBTQ2S+	Lesbian, Gay, Bisexual, Transgender, Queer or Questioning, and Two-Spirit
SEO	Search Engine Optimization
SODEC	Société de développement des entreprises culturelles

1.0 Introduction

This report presents results of an online survey conducted among a mix of independent podcasters and owners/co-owners of small to mid-level podcast networks in Canada. A total of 24 podcasters/owners participated from February 24 to March 12, 2021.

The survey was developed with results analyzed by The Canadian Podcast Listener partnership (Signal Hill Insights and Ulster Media).

It was commissioned by the Department of Canadian Heritage to support the Department's goal to gather evidence-based information to better understand how to support Canadian creators of digital media such as podcasts. The specific objectives of this study were as follows:

- Generate qualitative insight on the independent and mid-sized creatives who function within the podcasting industry in Canada;
- Gain a better understanding of podcast industry dynamics;

- To use insights gathered to help inform future research.

Note: This study is not designed to provide a comprehensive or definitive view of Canadian podcast creators. Rather, it is an exploratory study to get an initial understanding of the Canadian podcasting sector by hearing from a diverse mix of independent and mid-level podcast creators on the nature of their work and the challenges they face.

2.0 Sample profile

Targets were set to recruit independent and mid-level podcasters from the following segments: French, English and Indigenous. Efforts were also made to include representation from the Black, Indigenous, People of Color (BIPOC) and the Lesbian, Gay, Bisexual, Transgender, Queer or Questioning, and Two-Spirit (LGBTQ2S+) communities.

Of the 24 podcasters/owners participating in the survey:

- 12 classified themselves as 'a podcast creator overseeing at least 2 podcasts'; 9 were 'independent' creators, 'primarily responsible for just one podcast' and 3 specified other roles;
- 9 were identified as English podcasters; 9 were French podcasters; and 6 represented Indigenous podcasters;
- 2 referred to themselves as Black/ African-Canadian; 1 as South Asian; and 1 as Inuit;
- 3 classified themselves as LGBTQ2S+ and 1 as being disabled;
- 11 were from Montreal and environs; 8 from Toronto and the Golden Horseshoe; 2 from Winnipeg; 1 from Ottawa/Gatineau; 1 from Greater Vancouver; and 1 from Iqaluit.

Respondents invited to participate in the survey were largely selected using 'snowball sampling,' a recruitment technique in which research participants are asked to identify other potential subjects. While 'snowball sampling' is helpful in recruiting difficult-to-find target groups, it should not be seen as broadly representative of those segments. For example, the seed sample for this survey was made up of professional podcasters, so those podcasters who approach podcasts as a hobby are likely under-represented in the survey sample.

3.0 Overview of findings

3.1 Personnel/functions

- Almost none of the podcasters surveyed work by themselves; they almost all need at least one other co-worker. Mid-level podcasters work with an average of 5 people or more on their podcasts; for both groups combined, it is 3 to 5 people on average.
- Indie podcasters almost always host their own podcasts; mid-level podcasters were more likely to be showrunners/producers or even sound designers/mixers/editors.
- Indies hire sound designers/mixers most; mid-level hire hosts most often.

3.2 Podcast type, reach and growth

- Most indie podcasters are just working on one podcast; most mid-levels had at least 3 podcasts or more.

- Several podcasters work in multiple languages. Out of 24 podcasters, 5 said they recorded in more than one language. The rest were either French or English. Indigenous podcasters tended to publish in at least one other language as well.

- Most had a sense of how many downloads they were receiving per episode in a month on average. The answers varied greatly. The highest number of Canadian downloads in a month for a podcast episode was 200,000+, the lowest was 70. There were a couple of indies and a couple of networks with big numbers; a few more on the mid-level side, but there are some indie success stories.

- More than half said their audience base has grown year-over-year. Only one respondent said their numbers were down. Most indies said their numbers more than doubled in the past year. (But it's easier to "double" when your numbers are fairly low to begin with.)

- Most attributed growth to marketing/promotion initiatives, but there were other interesting responses specific to each podcast.

- Almost everyone said they had 50% or more downloads coming from inside Canada. There weren't any obvious correlations when looking at the English/French/Indigenous subgroups, or indie vs mid-level.

- USA, UK, Australia (English); France and Belgium (translated from French) were the countries doing the most downloading outside Canada.

- Most feel it's at least somewhat important to have listeners outside Canada. It was generally more important to indie podcasters than to mid-level networks. (Almost half of the mid-level networks said it was not very important).

3.3 Promotion and platforms

- Virtually all promote via their own social feeds. Search Engine Optimization (SEO) was also a very common practice (almost half). A third guest on other podcasts. A quarter buy ads on social to promote.

- Indies tended to use Twitter most for this; mid-levels mentioned Facebook and Instagram more. Those were the top three social networks across both groups.

- Almost everyone posts their podcast to their website. Half post other content related to their podcast on their website as well.

- YouTube is used for promotion by some in both groups; a third of podcasters said they post their podcast there as well, and a quarter say they use it to post other content related to their podcasts.

3.4 Revenue and other financial supports

- More than half of podcasters said everyone working on their podcasts gets paid something for their services; about 20% said none. Mid-levels were more likely than indies to say people were getting paid something.

- The most common source of revenue was listener donations (almost half, with more on the indie side). Donations were also named most frequently as providing the most revenue for their podcast.

- A quarter reported sponsorship revenue from firms/organizations. Just over one-in-five had ad revenue, split proportionally across indies and mid-level podcasters.

- About 30% said they generate no revenue; this was a little higher on the indie side, but not dramatically so.

- Live shows and merchandise also generated revenue (but the impact of Coronavirus disease [COVID-19] has affected live shows).

- Among those generating revenue (17), just over 40% said they generated less than $5,000 last year. Two were making $100,000 to $250,000 (one indie, one mid-level). The rest reported less than $50,000.

- Podcasters generating revenue were equally split between those who said that it more than covers costs and those who said it does not. A few said it just meets costs. This was consistent across both groups (although we suspect that some of the indies were not including their own time/efforts as a "cost").

- More than a third did not have other financial supports.

- A quarter said they had a government grant of some kind. Only one mentioned federal (PCH). The others were split between Provincial and Municipal grants.

3.5 Motivations

- Podcasters are motivated by a mix of professional and personal interests.
- Half say they are motivated to make podcasts both personally and professionally; just over 10% say they do it mostly to satisfy a personal interest; while just over a third say they see it mainly as a profession.
- Just over half work part time on podcasts, mostly indies. Half of the indie part-timers want to make it full time.
- Most mid-levels are full-time. Among the few mid-level part-timers, none want it to be full time. (Presumably, these are serial entrepreneurs with their fingers in other pies).

3.6 Obstacles to success

- Podcasters offered a wide range of responses when asked to identify the biggest obstacles to greater success for their podcast(s).
- Most commonly, podcasters cited limited resources as a barrier to growth:
    - “Making podcasts outside of a network; the industry's reliance on CPMs and ad revenue as a key determinant of success”
    - “Lack of financial resources; lack of government programs that fund podcasts (for example, CMF does not fund podcasts, neither does SODEC) limited budgets; business models that are not yet convincing…”
    - “Lack of funding to pay myself and my collaborators for their work on the project”
- Discoverability was also frequently cited as an obstacle. Several podcasters found it difficult to punch through the noise and get noticed:
    - “Canada's low population/difficulty reaching American markets with Canadian content”
    - “If I were starting another podcast today, discoverability is a huge issue. Canada is at a disadvantage when it comes to Apple Podcasts because the people making decisions for the homepage are not in Canada, and often will implement elements on the Canadian homepage that came from the US simply because there is no one focusing on Canadian content. Example: that recent time when Wondery took over the entire carousel. It would have been lovely here in Canada to be able to feature a Canadian podcast instead and we have so many! But the amount of US content being promoted is overwhelming.

Whenever you look at the top 25 podcasts in Canada, less than five of them are actually Canadian podcasts. The needle on this needs to be moved."

- "Lack of knowledge of the product (although this is beginning to change) … the competition from video." (translated from French)
- "Public Relations (PR) and Marketing to major brand names - Building the audience"
- "Media interest, social media apathy…"

- Other obstacles included Human Resource (HR) issues, challenges around building audiences for French-language podcasts in Europe with Quebec content, and accessibility issues.

3.7 Impact of COVID-19

- Only a few podcasters said they produced less content because of COVID-19. A couple even said they produced more!
- Several commented about the impact of COVID-19 on audio quality:
  - "We run a recording studio and can no longer have paid clients inside, which has radically reduced my income and also the audio quality of our shows, since everything needs to be done remotely now."
  - "More difficult to conduct in person interviews safely. Even with tools like zencastr, it's difficult to control for recording mistakes in remote interviews, and audio is lower quality"
- Others cited how COVID-19 extended the type of content they produced:
  - "It made it possible to produce content to reach people who would otherwise have attended conferences and seminars."
  - "I received a sponsorship for 5 episodes of 104 New France stories from a festival that used them to offer a "digital" edition to its audience." (translated from French)
- Interestingly, a few said they developed new skills or got more work/audience as a result of the pandemic.
  - "Increase in our listening (we do a youth podcast ...)" (translated from French)

    - "… we have developed extraordinary expertise for broadcasts via Zoom and other similar platforms. We expect to continue doing this once the pandemic is resolved." (translated from French)
    - "Able to get guests coast-to-coast which has been a good thing."
- Meanwhile, some pointed to the lack of ability to hold live events during COVID-19:
    - "Curtailed plans to carry out live in-person events"
    - "Inability to hold a press event to launch and promote the podcast; inability to organize premieres in the communities that participated in the podcast ..." (translated from French)

3.8 Planned initiatives

- When asked to identify new initiatives they have planned for the next year, many of them addressed obstacles they had mentioned earlier:
    - "More episodes, including a spin off series (released in a new RSS feed - I'm interested to see if having two podcasts referring to each other will increase the exposure for each)"
    - "A Patreon incentive push"
    - "We are focused on audience growth, we've created a survey to find out more about our audience and target them better, outreach to media and more cross promotion"

4.0 Areas for further exploration

The findings from this study provide a first step towards understanding how PCH can support creators in the podcast industry. Additional research would be necessary to quantify these findings and probe into additional areas not covered by this study.

Among the areas to consider for future study:

- A more definitive picture of revenue. We captured a variety of different revenue sources from the survey but did not get a clear understanding of the revenue hierarchy. Donations were the most common source of revenue, but other sources were mentioned, including sponsorship, live events, as well as advertising which drives the revenue of the most successful podcasts. Likewise, we have limited visibility into how many podcasters are covering costs; some podcasters didn't appear to be including their own time when reporting costs.

- Access to funding. Several podcasters mentioned getting government grants from municipal, provincial and federal sources. How much does that amount to, by source? What options do podcasters have right now in Canada?

- Size and nature of the industry. Almost all the podcasters in the survey indicated that their podcasts are a group effort, with various individuals filling specialized roles. How many Canadians are working in the podcast industry, and what are their roles?

- The needs of workers in the podcast industry. Many of the people contributing to Canadian podcasts are freelance producers or editors, writers, etc. They work on different podcasts for different employers, and sometimes their work takes them outside podcasting. They generate a good proportion of their annual income from podcasts, but they have no job security. These contract workers were not captured in this questionnaire because they aren't podcast "creators." Yet the industry needs them. How can they be helped to earn a stable and comfortable living in the podcast industry?

- Discoverability. Podcasters identified discoverability of their podcast(s) as a huge barrier to success. They are competing for shelf space and awareness with popular American podcasts. What lessons can be learned from Canadian podcasters who have managed to find a large domestic and international audience? How can that learning help to create initiatives that will help other podcast creators take their content to market?

Appendix

Top-line survey data among the full sample of the podcasters surveyed are provided on the following pages.