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# PODCASTS IN MENA

## State of the Industry 2019

AMAEYA  
MEDIA

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# NOTE FROM THE CEO

As we wrap up two years of being a podcast-first company in the UAE—a journey that led to AMAEYA Media becoming the largest podcast network in the country with 14 shows—it was fundamental for us to provide the right context for the industry and gather insights from listeners and non-listeners. Our first ‘State of the Industry’ report is an accumulation of not just our survey data, but also global insights and our own experience in the industry over the last 24 months.

None of this would be possible without the feedback of our community of listeners and the growing ecosystem of podcasters and companies that are planting their roots in the medium. We hope this report paves the way for all of us to build on top of actual data and help bridge the gap between creators, listeners, publishers and advertisers.

Consider this a call to action for the industry at large—please send us your feedback, suggestions and inputs, and do share the report. If you’re interested in contributing towards the report or other initiatives in the future, please give me a shout.

Finally, this report would not have been possible without the hard work of Pashma Manglani and Pooja Sagar, and the gracious inputs from Elie Abou Saleh, Gabriella Reis, Karyn Fernandes, Mark Steadman, Omar Tom, Dr. Sabir Haque, Shelina Jokhiya, Tatiana Antonelli-Abella & Vinita Bharadwaj. I also want to thank everyone who took the time out to take our survey.

Until next year!



Chirag Desai  
Chief Executive Officer  
AMAEYA Media

# EXECUTIVE SUMMARY

The Apple Podcasts directory crossed its 800,000<sup>th</sup> show listing in December 2019, a first for the medium that has been soaring in popularity over the last five years. The industry itself is poised to exceed US\$2 billion in advertising revenue globally by 2021 according to a study by the Interactive Advertising Bureau (IAB) and PwC.

While we don't have specific revenue figures for the Middle East & North Africa (MENA) region, we are seeing a similar exponential growth in popularity of podcasts among regional listeners. The region currently produces an estimated 400+ podcasts.

To help provide a regional context for the industry as well as data about listener preferences and current habits, we launched our first survey earlier this year. Our research brought out three key findings for the regional industry in 2019:

- There's a disconnect between local listeners and locally produced content
- Podcast discovery is still a major challenge
- Local listeners find podcasts a great way to make the most of their time

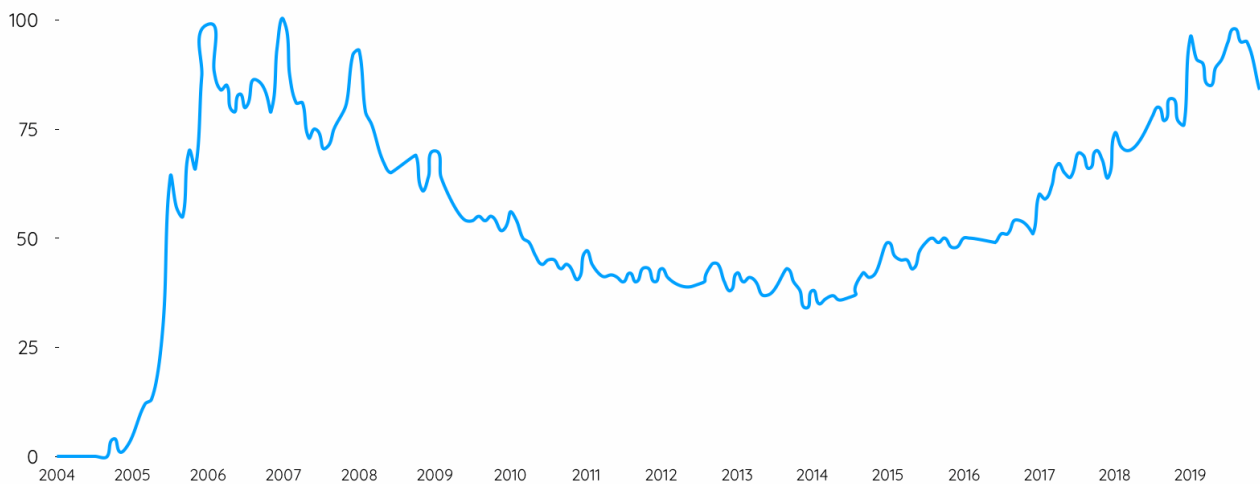
Our first *State of the Industry* report delves into our survey findings, highlights key trends and challenges for the medium and provides our perspective on the regional industry. The report also incorporates inputs from major industry players such as Anghami, Dukkan Media & Podiant.

# INTRODUCTION

In a world where everything is increasingly customized, on-demand and exclusive, podcasts play an important role in continuing the cultural shift in how people consume their content. Spoken-word content provides an intimate and almost nostalgic personal experience, reminiscent of an era gone by.

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## 'Podcasts': Search interest over time



Numbers represent search interest relative to the highest point on the chart for the given region and time. A value of 100 is the peak popularity for the term.

Source: Google Trends, 2004–present day

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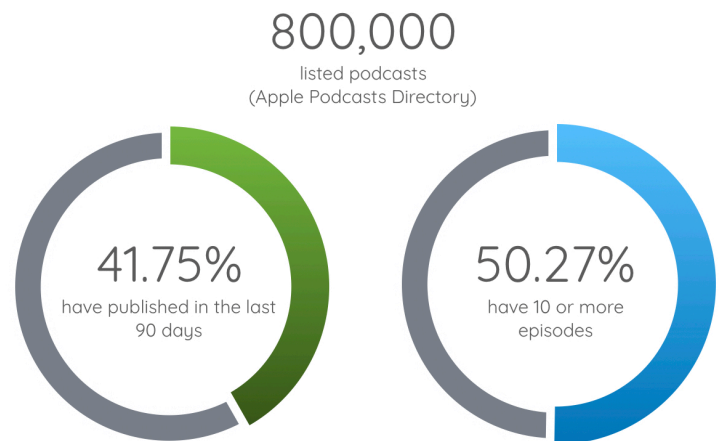
While podcasts are not new by any means—the first mention of the word dates back to 2004<sup>1</sup>— it was the advent of the narrative true-crime podcast *Serial* in 2014 that spearheaded the medium into the mainstream. Since then, the steady growth in podcast consumption has continued, with the last 12 months being no different. Edison Research’s 2019 annual podcast report found that 51% of Americans over the age of 12 have listened to a podcast at least once, with 32% having listened in the past month<sup>2</sup>.

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<sup>1</sup> [Audible revolution](#). 2009. *The Guardian*.

<sup>2</sup> [The Podcast Consumer 2019](#). *Edison Research*.

2019 was a monumental year in many ways for the industry with acquisitions, reshuffles and various new launches. The number of shows listed in Apple Podcasts' directory crossed 800,000 in December<sup>3</sup>, of which about 41% are considered active<sup>4</sup>. Spotify planted its roots firmly in the space with the acquisition of content studio Gimlet Media and technology platform Anchor in May, while also announcing their plans to spend an additional US\$500 million in podcast-related acquisitions<sup>5</sup>. Both Apple<sup>6</sup> and Google<sup>7</sup> introduced new features for their native podcast applications, including the ability to search by text through episode audio.



Source: My Podcast Reviews  
11 December 2019

There has been significant movement within the region as well this year. Anghami, the Beirut-based music streaming service with over 13 million active monthly users, launched its podcast section late 2018 and offers studio space for podcasters to record their shows. During 2019, the platform launched a version update to their podcast player as well as show pages. In May, Kerning Cultures announced they had raised US\$460,000, becoming the first venture-backed podcast company in our part of the world<sup>8</sup>.

“Podcasting offers a classic 'horizontal' media form: producers are consumers, and consumers become producers and engage in conversations with each other. Based on my interactions with the podcasters in the UAE, podcasters support each other at the grassroots level; they appear on each other's shows and promote the work of others and, in the process, often explain how they do and what they do.”

Dr. Sabir Haque

Professor of Broadcast Media & New Media Technologies, Manipal Academy of Higher Education,  
Dubai Campus

<sup>3</sup> [Podcast Industry Statistics](#). *My Podcast Reviews*.

<sup>4</sup> My Podcast Reviews considers a show having published at least one episode in the previous 90 days as 'active'.

<sup>5</sup> [Spotify buys podcast startups Gimlet Media and Anchor, plans up to \\$500M in acquisitions in 2019](#). *Variety*.

<sup>6</sup> [Apple podcasts enhance audio transcript search in iOS 13](#). *Rev.com*.

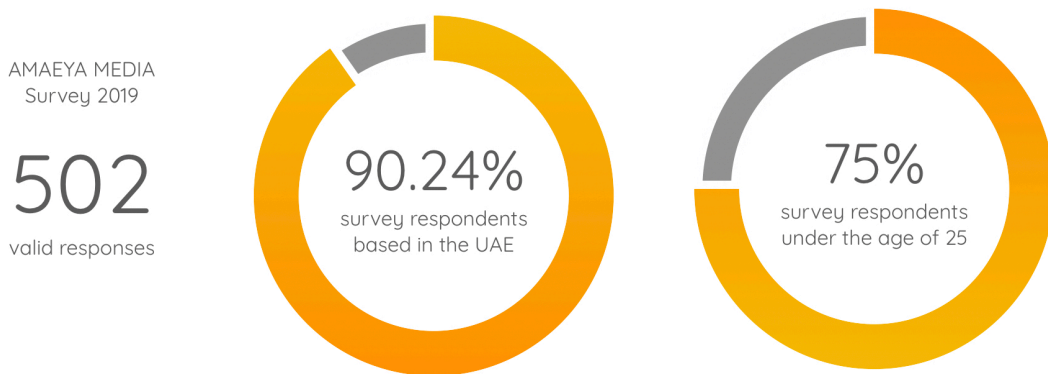
<sup>7</sup> [Google Podcasts unveils episode search, driven by automated transcripts](#). *Podnews.net*.

<sup>8</sup> [Dubai-based Kerning Cultures raises 460000 seed funding](#). *Wamda*.

# LISTENER SURVEY

While a large volume of data and research is available primarily in the United States as well as other markets, there is a lack of data exploring listenership behaviour in the region and how our trends stack against global averages.

In an effort to address this gap, AMAEYA Media carried out a consumer survey to help better quantify local podcast preferences. 502 valid responses were received for the survey, which ran during November 2019. The survey was open to the general public but targeted residents of the United Arab Emirates, who formed 90% of the respondents who completed the survey<sup>9</sup>.



## Key trends

The following key trends emerged out of the 2019 survey:

- \* **There's a clear disconnect between local listeners and locally produced content:** While nearly half of those surveyed expressed an interest in listening to local shows, less than 30% actually do.
- \* **Podcast discovery is still a challenge:** Social media and word-of-mouth are still the biggest ways to discover podcasts. While various attempts are underway from platforms to help listeners find new shows, discovery continued to be a major challenge in 2019.
- \* **Local listeners prefer shorter podcasts that allow them to multi-task while doing other activities:** With a majority of listeners tuning in during their daily commute, podcasts enable listeners to consume information and knowledge, or grab a slice of entertainment while completing other tasks such as travel or chores. This is complemented by the preference of a majority of listeners for shows less than 30 minutes long.

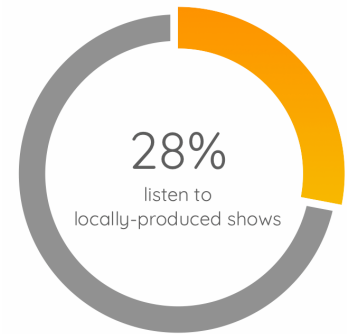
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<sup>9</sup> Details about the survey and methodology can be found in APPENDIX A.

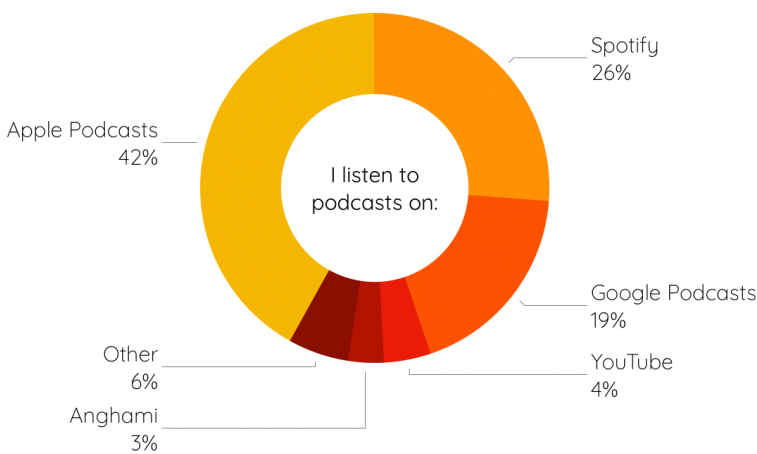
# THE DICHOTOMY: LOCAL VS INTERNATIONAL CONTENT

Although nearly half of podcast listeners surveyed said they were open to listening to regional content, only 28% are actually listening to local shows. There are quite a few reasons for this dichotomy.

The UAE in particular is an expat-heavy country and many listeners are more connected with shows from home. Many have Apple IDs registered in their home countries, which affects the browsing tab in Apple Podcasts, the dominant podcast player (42%). Non-Apple podcast listeners tend to tune in via Spotify (26%) or Google Podcasts (19%) and are also usually directed to globally trending shows or work with algorithms that tend to suggest 'similar' shows to those already selected, compounding the problem.



AMAEYA MEDIA Survey 2019



AMAEYA MEDIA Survey 2019

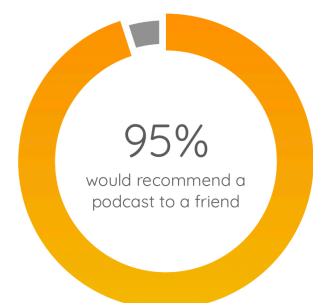
Comparatively, less than 4% of respondents browsed on Anghami, the only regional streaming service, which carries over 300 shows that are predominantly from the region.

There is also a perception that locally produced content would not be of the same quality as internationally produced shows, especially when compared to media houses with high brand value such as NPR or Vox

Media and podcast-first companies such as Gimlet. Even among non-listeners, 39% noted that the ability of good local and relevant content would make them try the medium.

## SOCIAL DISCOVERY

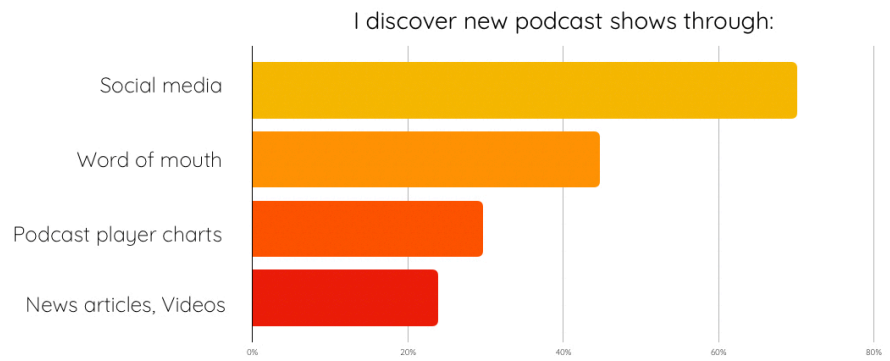
Most respondents confirmed that they discover new content through social channels, primarily via social media or through word-of-mouth. A personal connection and organic reach seems to be the best way to reach listeners. Nearly all listeners surveyed confirmed that they would share podcasts with their friends.



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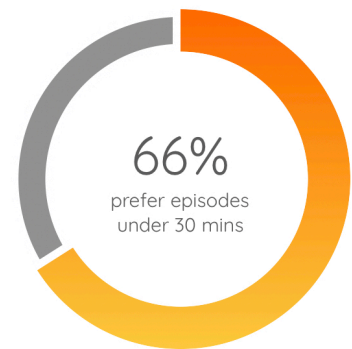
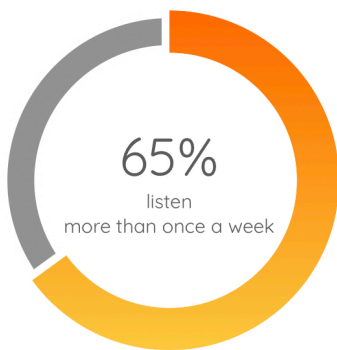
This trend seems to hold true even within Anghami's own data, where 67% of their users subscribe to podcasts via searching for them directly, implying touch points outside of the platform itself.



AMAEYA MEDIA Survey 2019

Hence it is still difficult for new podcasters to get their content discovered, especially without outreach through other social channels. This only adds to the disconnect seen between locally produced podcasts and listeners.

## THE MULTI-TASKING ANGLE



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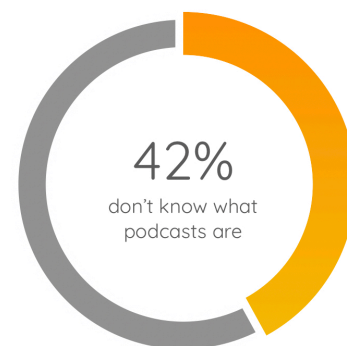
For a generation that is always on their devices, podcasts offer a great way to consume content while engaged in other tasks where they are unable to focus directly on their screens. Nearly all listeners (92%) listen to podcasts while doing other activities, primarily commuting (43%) and doing household chores (23%). Over 66% of listeners also prefer episodes that are under 30-minutes long, indicating a clear tie-in with typical commutes, chores and workouts.

# OUTLOOK FOR REGIONAL PODCASTING

In order for local podcasters to grow their reach, there needs to be a stronger understanding of what listeners are looking for. There continue to be challenges regionally that need to be addressed to help create opportunities for the local ecosystem.

## UNFAMILIARITY WITH PODCASTS

We're still not at a critical mass of awareness of podcasting as a medium for delivering and consuming content. Among non-listeners, over 40% said they didn't know what podcasts are, or how to listen. Within the same group, 61% said they could be persuaded to start listening if they had someone to guide them, or knew how to discover good shows.



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Regional events like the Middle East Podcast Forum, which completed its second edition in 2019, or the first ON.DXB festival which conducted a panel, *Podcasts taking centre stage*, have helped with awareness among non-listeners but we are far from mainstream adoption within the region just yet.

## PERCEPTIONS AROUND LOCAL CONTENT

With 48% of listeners expressing a desire to listen to local content but not doing so, and nearly 40% of non-listeners saying they would listen to podcasts if there was good local content there is a disconnect between local providers and listeners. The high percentage of respondents who are looking for 'good content' seems to imply a perception that the quality of locally-produced content is of lower quality compared to international shows.

However, research carried out by Dr. Sabir Haque, professor of New Media and Broadcast Media at Manipal University of Higher Education (MAHE) indicates that local content is continuing to diversify across categories. His study, titled *Podcasts in the UAE: narratives re-invented and re-casted* argues that not only is the region starting to thrive with stories across tech, culture, music and local affairs but also has content with "high production value". It

further notes that podcasters have been able to open dialogue on “previously untouched topics in the Middle East and its diaspora.”

The perception exists despite the international recognition some shows have received. In fact, actor and style icon Sarah Jessica Parker shared her love for the show *Kerning Cultures* on Instagram recently<sup>10</sup>.

## WHAT LISTENERS WANT

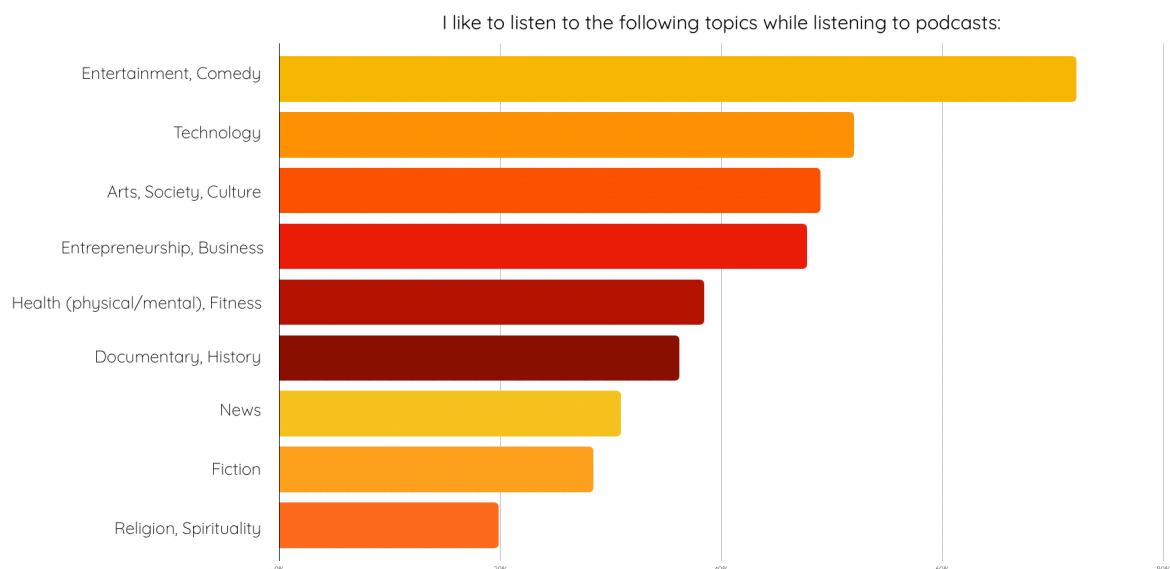
In our survey, when we asked listeners about the themes they were most interested in, the entertainment (including comedy) category came out on top. This trend does hold true globally as well, with celebrity comedians such as Marc Maron or Joe Rogan operating in this category for a few years, while talk show stars such as Conan O’Brien have also delved into podcast partnerships.

While some local podcasters seem aware of the popularity of these topics, there are few active shows that cater to this genre. *The Hangout with Rushdie* is popular within this category<sup>11</sup>, while Rami Zeidan collaborated with celebrity host Big Hass to launch *7awwil* about the history of hip-hop in both Arabic and English. Overall though, there seems to be a large gap in content produced within this genre regionally.



sarahjessicaparker If you are looking for a way to pass some time this weekend, I hope you will consider this wonderful podcast @kerningcultures It will transport you to places far away and introduce you to stories and people you likely do not know. It's so beautifully done by all the reporters and contributors and the time spent listening gets us all one step closer to better understanding those whose lives seem very different from our own. X,SJ

Source: Instagram



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<sup>10</sup> [Sarah Jessica Parker on Instagram.](#)

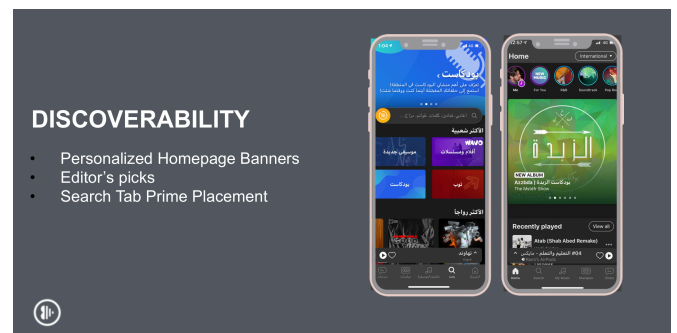
<sup>11</sup> [Why more people than ever are creating audio content in the UAE. The National.](#)

Beyond entertainment, listeners also expressed an interest in technology, arts & culture, and business & entrepreneurship.

## DISCOVERY ACROSS PLATFORMS

Globally, a few efforts are underway to help discovery with platforms like Spotify recently launching a playlist feature to suggest similar shows to help with discoverability<sup>12</sup>. Both Apple Podcasts and Google Podcasts launched auto-transcription to enable easier search for topics and guests within episodes during the year. However, discovery continues to be difficult when it comes to locally-produced content. Industry professionals with a regional focus will need to work together across the publishing chain to help tackle this gap.

Anghami, which has over 13 million active users monthly, crossed their 10 billionth stream on the platform this year, showcasing the appetite within the region. Their recent updates have allowed for podcasts to be showcased on homepage banners, category browsing and editor's picks to enhance discovery of regional shows.



Source: Anghami

## THE CHALLENGE OF STANDARDIZATION

As a medium, podcasts are fundamentally different from today's social platforms, where the various elements of the chain—from publishing to consumption—is not controlled by a single platform, compared to platforms like YouTube for video or Instagram for social photo sharing. Podcasts' best corollary is blogging of the early 1990s since creators have the same flexibility to publish on platforms of their choice, while consumers can listen to episodes in the app of their choice, or multiple apps should they choose to—all made possible via the open RSS standard. While this platform independence is what makes the medium so appealing, it also makes data collection and understanding real trends a challenge.

This is another area of interest in 2020, as steps are currently underway to address these concerns. The Interactive Advertising Bureau rolled out the IAB Tech Lab Podcast Measurement Compliance Program<sup>13</sup> in December 2017 to establish a common set of advertising metrics for podcasts and a base set of principles that any measurement system should support. However, high certification costs act as a deterrent to large-scale compliance,

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<sup>12</sup> [How to make your own podcast playlists. Spotify.com.](#)

<sup>13</sup> [Podcast measurement guidelines. IAB.com.](#)

with 2019 seeing a few podcast hosts such as LibSyn and ART19 joining Blubrry, which was the first host to be certified in 2018<sup>14</sup>.

The independent space has also seen some efforts such as the Open Podcast Analytics Working Group, a community-driven organization aiming to pool resources to create acceptable standards for measurement. In September 2019, the Group launched their first full list of podcast user-agents<sup>15</sup> to help hosts correctly understand what apps and devices are downloading shows, and help determine legitimate download counts while ignoring bots.

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“ The idea was to develop an open source, transparent set of guidelines and a way to test against them, to make sure each platform is implementing this in the same way. I wanted to work with a number of independent hosting providers on a standard for tracking episode downloads and hopefully to make that data portable between providers.”

Mark Steadman

Founder, Podiant

Founding member, Open Podcast Analytics Working Group

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There has also been some movement towards creation of aggregation platforms that sit between the apps and providers to collate data better. Podtrac, an independent provider of podcast measurement and analytics, continues to supply statistics and monthly reports across publishers who use its service. Chartable, a podcast measurement company, announced in October 2019 that they are in process to seek IAB certification<sup>16</sup>. Such services could provide a reasonable alternative where providers may be unwilling to seek compliance, which would be useful to local publishers as well.

## MONETIZATION

Podcasts are monetized in a few ways globally. Larger media companies with internal podcast teams tend to drive listenership from within their existing channels, and monetize through

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<sup>14</sup> [Blubrry and NPR are first with IAB Certification](#). 2018. *Podnews.net*.

<sup>15</sup> User-agents are identifiers used by podcast applications and devices are identifiers used by podcast applications and devices when downloading your podcast from your host.

<sup>16</sup> [Announcing Season 2 of Chartable Radio](#).

existing brand partnerships. Podcast-first companies use monetization models that are split between advertising and branded shows, or live events.

However, individual shows, which are the dominant podcast type worldwide, monetize primarily through ad sponsorships and/or listener donations. In the region, this is an area that has been an on-going challenge for all podcast producers.

In the US alone, the podcast ad industry generated US\$628 million dollar in advertising revenues during calendar year 2018, and is expected to exceed US\$1 billion dollars by 2021, according to a study conducted by the Interactive Advertising Bureau (IAB) and PwC<sup>17</sup>.

As already highlighted, there is a disconnect between locally produced content and local listenership, which naturally affects the ability of local podcasts to effectively garner listeners and in turn, consistent sponsorships. This leads to brands being generally apprehensive about measurable return-on-investment for marketing dollars through podcasting. We expect 2020 to see some progress in this region as more companies start to push through this barrier and work towards brand buy-in.

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“ As a content network ourselves, we’ve adopted different models to monetize our shows so far. And we’re still testing these models. At the moment, our only learnings are what’s been done globally, and even that’s not enough. So we’re R-and-D’ing this stuff ourselves.”

Omar Tom  
Founder, Dukkan Media

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Many platforms have attempted to approach monetization themselves in a few different ways. Hosts such as PodBean also offer an option for marketers to buy ads with podcasts who sign-up, while independent companies such as Midroll provide a marketplace to match podcasters with advertisers. Others such as Stitcher or new-entrant Luminary are looking to create a Netflix-like model of subscriptions to access content behind a paywall. Although Luminary's offering was celebrated at launch, starting out with a healthy US\$100,000 in funding in 2019, it was soon marred by controversy around the questions of ownership of Luminary’s revenue model. Concerns stemmed from the fact that podcasters had not explicitly agreed to be on

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<sup>17</sup> [IAB FY 2018 podcast ad revenue study](#). *Interactive Advertising Bureau*.

their platform and were not provided a share for being featured when they were not in a formal partnership with Luminary.

In mature markets, it is widely understood that downloads typically mean ‘the number of unique listens garnered with 30 days of episode release’. But locally, there is no way to report this data accurately or to explore the reliability of existing data.

Perhaps the space is now ripe for a similar marketplace for regional shows, or a platform to receive listener donations. Exploring the difficulties of using external services such as Patreon to collect payments from listeners, or crowdsourcing platforms are outside of the scope of this report. However, contrary to what may be expected about local listeners, over half of the respondents of our survey indicated a willingness to pay up to US\$5 for additional content from podcasts they were interested in.

## THE CASE FOR BRANDS IN PODCASTS

With podcast advertising revenue expected to cross US\$2.4 billion globally, it comes as no surprise that brands have found their space in the medium over the last few years, and 2019 was no different.

According to ‘Audio: Activated’, a study commissioned by StoryWorks, the BBC’s branded content division, individuals who label themselves as ad-avoiders<sup>18</sup>, were 22% more engaged and likely to remember brands mentioned in podcasts compared to TV ads<sup>19</sup>. Specifically, the study found that “the intimate and conversational nature of the podcast environment creates an elevated state of engagement for brand mentions”. Brand awareness saw an overall 89% increase, brand favorability 24% and purchase intent a 14% increase through mentions on podcasts.

22% ↑  
higher engagement  
compared to TV ads

89% ↑  
brand awareness

24% ↑  
brand favorability

Source: BBC StoryWorks

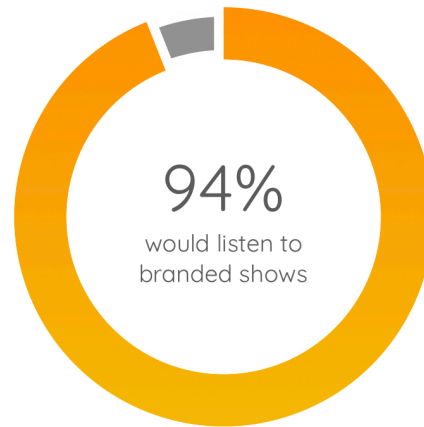
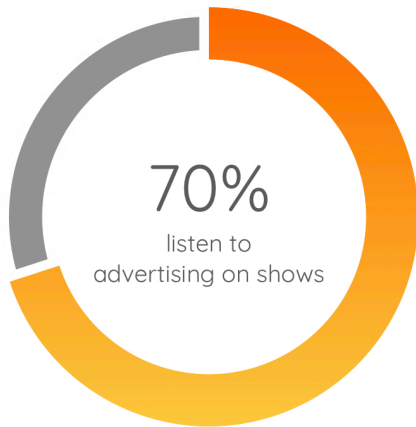
Midroll, a podcast advertising network, found that listeners on average make it through approximately 90% of an episode within their network, and a relative few skip ads<sup>20</sup>.

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<sup>18</sup> Consumers now have a range of ways with which they can avoid advertising, whether this be by skipping ads, installing ad blockers or by switching to paid ad-free platforms. These are consumers that now block ads because they can.

<sup>19</sup> [Audio: Activated - new BBC Global News study reveals unique effectiveness of branded podcasts](#). BBC StoryWorks.

<sup>20</sup> [Podcast Listeners Really Are the Holy Grail Advertisers Hoped They'd Be](#). 2018. *Wired*.

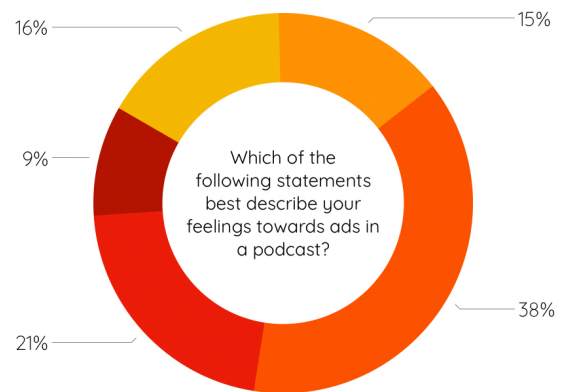


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Locally, we found that 70% of respondents listen to an ad message during an episode, of which 15% listeners actually use ads as a way of discovering new brands. In comparison 30% felt negatively about ads in a podcast. The contrast is even more telling for branded shows, with only 6% of listeners saying they would never listen to a branded show.

Among those willing to listen to branded content, 71% said they would listen as long as the content was well-produced, while 21.8% said they would do so only if they identified with the brand in some way. Therefore, the motivation for creating shows and for brands to use them effectively still relies on the same tenets that work for non-branded shows: a strong focus on the content.

Brands should view podcasts as part of a long-term communication strategy. Whether through creating entire shows or advertising and collaborating with existing shows, there is a lot to leverage towards brand awareness and messaging.



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- I don't mind, it provides a nice break to stop and restart the episode
- I discover new brands through ads in podcasts
- It doesn't bother me, but I don't want too many ads
- I skip through them as quickly as possible
- It's really annoying



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## CASE STUDY

### Forward Talks by Goumbook

Goumbook is one of the oldest social enterprises in the UAE and a strong sustainability advocate. As the organization gears-up towards its ten-year anniversary in 2020, the team wanted to look beyond blogs, events and activities to increase their reach and create a wider awareness for sustainable businesses and initiatives in the region.

Founder and Managing Director of Goumbook, Tatiana Antonelli Abella, didn't listen to podcasts herself a couple of years ago. "But when I'd talk to friends or to my team, I found everyone was telling me about shows and specific episodes they were listening to, or sharing information about the topics they were hearing. That's how I saw the impact podcasts can have—and the ability to reach people you'd never reach otherwise," she noted.

It was with this idea that in April 2019 Goumbook partnered with AMAEYA Creative, the branded podcasts arm of AMAEYA Media, to launch Forward Talks—the region's first podcast dedicated to sustainability. Since then, the show has aired 25 episodes covering topics from degassing landfills to women empowerment. *Building a sustainable future, with HSBC's Sabrin Rehman* is among the show's most popular episodes, grossing over 1,500 downloads.

According to Abella, the podcast has also become a great way to connect with the community. "Many listeners have contacted us to reach guests we've featured on the show. It's been a great way to know we're actually making a difference."



# CONCLUSION

From the trends we've witnessed this year, Steve Jobs was right when he announced in 2005 that podcasting was the future of audio<sup>21</sup>. At the time, the Apple Podcasts directory carried 3,000 podcasts; in 14 years, it has now grown to more than 800,000.

Our survey results clearly reflect an appetite for more podcasts, specifically in the categories of entertainment, arts & culture and business & entrepreneurship. For local creators, there is still a lot of room for new content to be developed to fit the medium.

When announcing their acquisitions earlier this year, CEO of Spotify Daniel Ek shared that “the format is really evolving and while podcasting is a relatively small business today, I see incredible growth potential for the space and for Spotify in particular.”<sup>22</sup> Spotify has led from the front in 2019, putting significant funding behind this vision.

The overall outlook for upcoming audio technology is also conducive for growth in the medium. Voice assistants Alexa, Google Assistant and Siri, along with the growing ecosystem of voice-activated apps, are feeding into the exponential demand for audio content. In fact, Apple announced the availability of the entire Apple Podcasts directory on Alexa, leading the way for ecosystem collaboration. Between smart speakers (like the Amazon Echo, Apple HomePod and Google Home), and connected cars, podcast listening is near seamless for anyone who wishes to give it a try.

Within the region we're still in a very nascent stage of the medium's own ecosystem, with significant growth expected among shows, listeners and rising collaborations across shows moving forward. And as brands continue to take notice globally, we expect they will look to work with various local shows as well.

With the industry still blossoming, the uncertainty in how far podcasting will go is summed up best by Sean Rameswaram, host of Vox Media's *Today, Explained*. “If you think of audio as the way you think of, say, film, like we're still in the black-and-white period of podcasting. What's color going to look like? What's 3-D going to look like?”<sup>23</sup>

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<sup>21</sup> [Apple takes podcasting mainstream](#). (2005). *Apple.com*.

<sup>22</sup> [Audio First](#). *Spotify.com*.

<sup>23</sup> [Full Q&A: Today, Explained host Sean Rameswaram on Recode Decode](#). *Vox Media*.

# APPENDIX A

## Methodology

AMAEYA Media conducted this survey to better understand the regional podcasting landscape and to identify future trends in the sector. The focus was on studying listener behavior and exploring the challenges that local podcasters may face.

The survey was distributed through AMAEYA Media's social media channels and referrals along with paid social media posts. The survey ran during the month of November 2019.

Over 90% of those who completed responses were based in the United Arab Emirates. Nearly half the respondents were between 19 & 25 years old, with 67% of them being male and the remaining 33% female.

A total of 512 completed responses were received. Repeated submissions from the same respondents were not considered for the purpose of this report. The data was further sanitized, such as in cases where a respondent selected the 'other' option but supplied a response that was covered by one of the choices already offered.

## Survey Questions

Respondents were presented with a simple Yes/No question to understand if they listened to podcasts. If yes, the following series of questions were asked:

1. How often do you listen to podcasts?
  - 1.1. Once a week or less
  - 1.2. 2-3 times a week
  - 1.3. More than 4 times a week
2. Do you listen to any locally produced (Middle East) podcasts? \*  
Mark only one oval.
  - 2.1. Yes
  - 2.2. No, I listen to international podcasts only
  - 2.3. No, but I would like to listen to them in the future
3. If you listen to local podcasts, give your favourite ones a shout-out below! (Comment box)
4. I primarily listen to podcasts while (mark only one):
  - 4.1. Driving/commuting
  - 4.2. Exercising

- 4.3. Doing household chores
- 4.4. Working
- 4.5. Other: (Comment box)
5. I started listening to podcasts because:
  - 5.1. Someone recommended it to me
  - 5.2. I read about it in the news and wanted to check it out
  - 5.3. I discovered it on my music streaming app
  - 5.4. I saw related material on social media (i.e. Instagram, Facebook, YouTube, Twitter, etc.)
  - 5.5. Other: (Comment box)
6. I listen to podcasts on:
  - 6.1. Apple Podcasts
  - 6.2. Google Podcasts
  - 6.3. Spotify
  - 6.4. Anghami
  - 6.5. Other: (Comment box)
7. I have been listening to podcasts for:
  - 7.1. Less than a month
  - 7.2. 1-6 months
  - 7.3. 6-12 months
  - 7.4. More than a year
8. I prefer to listen to episodes that are \_\_\_\_ in length:
  - 8.1. Less than 20 mins
  - 8.2. 21 - 30 mins
  - 8.3. 31 - 45 mins
  - 8.4. 46 - 60 mins
  - 8.5. More than an hour
9. I've recommended a podcast to a friend:
  - 9.1. All the time
  - 9.2. Once in a while
  - 9.3. Never
10. How do you listen to your shows?
  - 10.1. I manually select what I want to listen to & download only those
  - 10.2. I subscribe so that they download automatically for me to listen later
  - 10.3. I subscribe & hit play as soon as possible after the episode drops
  - 10.4. I don't subscribe and only listen to individual episodes that interest me
  - 10.5. Other: (Comment box)
11. I discover new podcast shows through:
  - 11.1. Word of mouth / recommendations by a person
  - 11.2. Charts in the podcast player
  - 11.3. Social media
  - 11.4. News articles interviews or videos
  - 11.5. Other: (Comment box)
12. I like to listen to the following topics while listening to podcasts: (select all that apply)
  - 12.1. Arts, Society, Culture
  - 12.2. Business, Entrepreneurship
  - 12.3. Documentary, History
  - 12.4. Entertainment, Comedy
  - 12.5. Fiction
  - 12.6. Health (Physical/Mental), Fitness
  - 12.7. News
  - 12.8. Religion, Spirituality

- 12.9. Technology
- 12.10. Other: (Comment box)
- 13. Which of the following statements best describe your feelings towards ads in a podcast?
  - 13.1. I don't mind, it provides a nice break to stop and restart the episode
  - 13.2. I skip through them as quickly as possible
  - 13.3. I discover new brands through ads in podcasts
  - 13.4. It doesn't bother me, but I don't want too many ads
  - 13.5. It's really annoying
- 14. Which of the following statements best describe your feelings towards branded podcasts (i.e. podcasts produced by or on behalf of brands/companies)?
  - 14.1. I would listen if the content was valuable / well produced
  - 14.2. I would listen only if the brand appealed to me
  - 14.3. I wouldn't listen to a branded show
  - 14.4. Other: (Comment box)
- 15. How much would you pay to receive additional content on top of a free-to-listen podcast (such as early access to episodes, bonus content, merchandise, behind-the-scenes content)?
  - 15.1. Around \$1 monthly
  - 15.2. Between \$1-\$5 monthly
  - 15.3. I wouldn't pay for it
  - 15.4. Other: (Comment box)

For respondents who answered 'No' to the original question, the following follow-up questions were asked:

- 1. What's the reason you don't listen to podcasts?
    - 1.1. I'm not sure what it is / how to listen
    - 1.2. It doesn't interest me
    - 1.3. I don't have the time to listen
    - 1.4. Other: (Comment box)
  - 2. What would convince you to listen to a podcast?
    - 2.1. Good local content / relevance
    - 2.2. A way to discover good shows
    - 2.3. Someone would guide me how to get started / what to listen to
    - 2.4. Other: (Comment box)
  - 3. Anything else you'd like to add? (Comment box)
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