

Podcasts in MENA State of the Industry 2020



amaeya

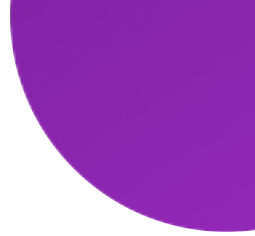


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FROM THE CEO'S DESK

When we put together our first *State of the Industry* report in 2019, we wanted it to be an annual exercise that would help contextualize the regional podcast industry along with international happenings. As a year, 2020 was one of the most monumental 12 months we've had to endure—and even as we witnessed some heartening trends for the medium, the industry was not immune from the effects of the pandemic.

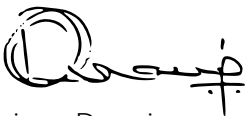
At Amaeya Media, we tried to use the time as an opportunity to revisit the drawing board. We kicked the summer off with a rebranding exercise that helped us redefine our look, and reinforce our mission towards the regional ecosystem. We were also delighted to hit an internal milestone of 10,000 minutes of audio published by the Network.

We hope this report helps provide a few insights about the industry we're in, how listener behaviour changed over the last year, and how creators and publishers adapted. It's been heartening to see that podcast consumption trended upwards as the year came to a close, and regional listener preferences held steady despite the challenges to listenership.

I wanted to thank our listeners, partners and the community of podcasters who continue to push the envelope in the work they publish every day.

This report wouldn't have been possible without the hard work of some amazing individuals who contributed to the writing and editing of this report, and everyone who took the time out to take the survey this year.

See you again in 2022!



Chirag Desai
Chief Executive Officer
Amaeya Media

EXECUTIVE SUMMARY

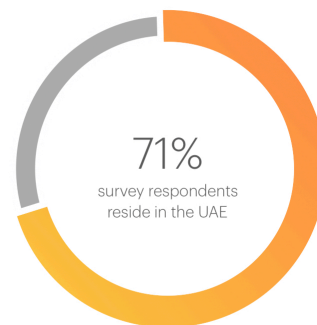
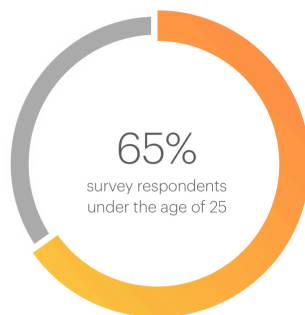
Our second *State of the Industry* report builds on last year's report by delving into key trends that emerged from the year, while also showcasing some of the impact the pandemic exerted on the medium.

This report also includes insights from our listener survey, which ran during December 2020 and early January 2021. 467 valid responses were received, with the median age of the respondents being under the age of 25, similar to last year. While the survey was open to the general public, we looked to expand our finding towards the region this year. Seventy-one percent of respondents this year were based in the UAE, compared to 90% last year.

Amaeya Media
Survey 2020

467

valid responses



Some of the key findings for the year include:

- People listened to more podcasts this year, preferring shows relating to entertainment, followed by self-help & improvement.
 - Listeners continue to prefer shorter podcasts, a trend strengthened by the lack of being outdoors or commuting this year.
 - The industry witnessed increased consolidation and siloing of content. Podcast discovery and standardization continue to be a challenge.
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THE YEAR THAT WAS

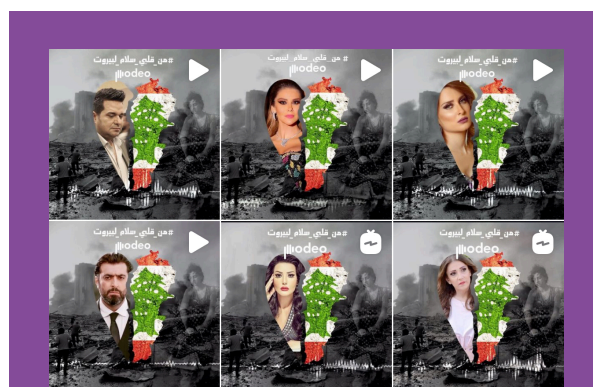
The birth of podcasting traces itself to December 2000, when Dave Winer met Adam Curry in New York City where they discussed, among other things, how to distribute large bits of audio and video without having to wait for them to download¹. This led to the birth of the RSS 2.0 standard—the backbone on which podcasts are distributed to this day—even if it took a little over three years for the word ‘podcasting’ to be coined².

So here we are, *twenty years* later.

It would be impossible to begin a report on 2020 without talking about the key event that defined the year for every industry and every individual. Unsurprisingly, the podcast industry witnessed an impact as well, although closing out one of the toughest periods in our collective conscious on a high.

Podcasts are primarily consumed passively. Our 2019 *State of the Industry Report* noted that 92% of respondents listen while multi-tasking—whether commuting, working, or working out³. These activities were directly affected by the lockdowns around the world, and podcast listening suffered as well. Based on self-disclosure by podcasters, estimates varied from seeing a 20%-70% drop in listenership over the March to May period. And while this listenership has since recovered, the impact to revenue and advertise will continue into the first half of 2021.

Podcast measurement company Podtrac recorded negative download growth across US-based



Source: Podeo (Instagram)

On August 4, Lebanon witnessed one of the worst explosions in its history, leaving hundreds dead, 6,000 injured and upwards of US\$10 billion of property in Beirut estimated as damaged. Podcast platform Podeo’s recording studios and offices also suffered damages due to the explosion.

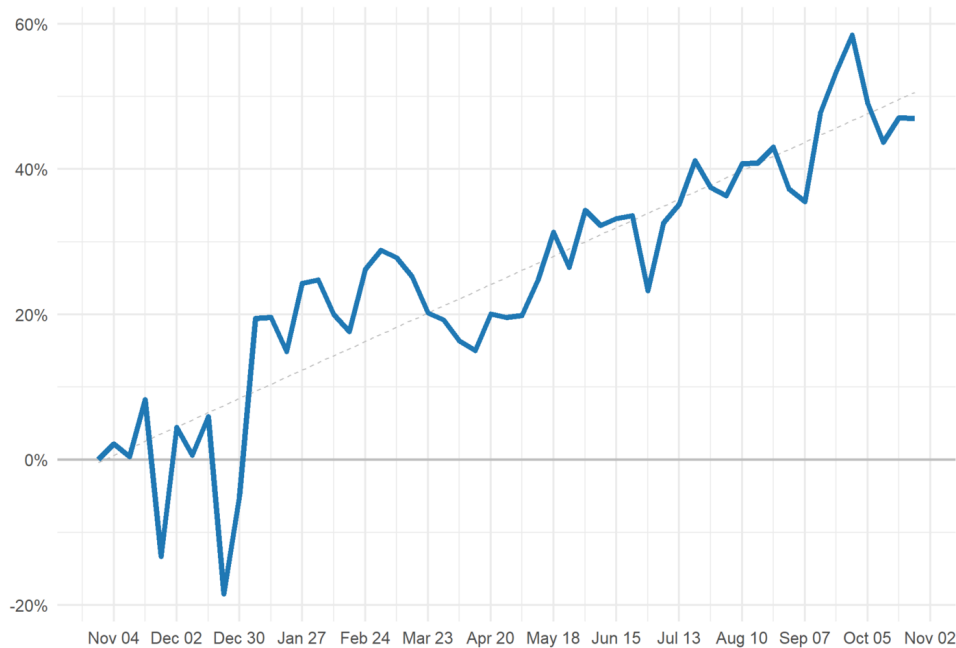
Podeo used this as an opportunity to allow listeners and creators to publish audio snippets within the platform to share how they felt and commiserate. The platform reports more than 7 million people tuned into these snippets from across 157 countries.

¹ [Scripting News](#). 2007. *Dave Winer*.

² [Audible Revolution](#). 2009. *The Guardian*.

³ [Podcasts in MENA: State of the Industry 2019](#). *Amaeya Media*.

U. S. Weekly Downloads: All Podtrac measured shows
52-week growth (%)



podcasts tracked by the service for most of March and April⁴, with the first positive growth after lockdowns recorded the week of April 20-26, 2020.

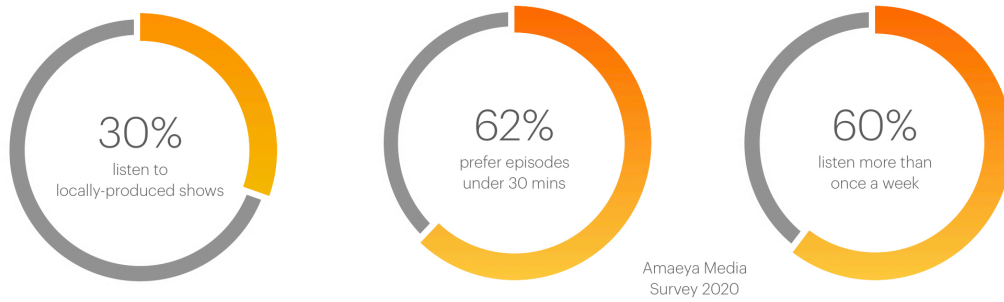
Podtrac's data show downloads saw repeated dips towards the end of June, September and again in October as new restrictions continued to be applied to combat the pandemic. The overall trend-line for the year veers upward however—a 47% growth by November compared to the same time last year.

Interestingly, the increased listenership of podcasts year-on-year is not yet competing for listening time within podcasts or other mediums. A Spotify research study found that adding podcast consumption caused users to spend more time on the platform by as much as 20 percent, over replacing existing time spent listening to music⁵.

Similar trends were seen regionally as well. Lebanon-based Podedo reports that the platform saw listens drop by as much as 48% in early March 2020. "As users have become accustomed to the new norm and behavioural changes, we saw a 700% growth in listeners in the following quarter," says Stefano Fallaha, CEO at Podedo. "We are still maintaining similar month-to-month growth."

⁴ [Weekly podcast data amid the coronavirus crisis. Podtrac.](#)

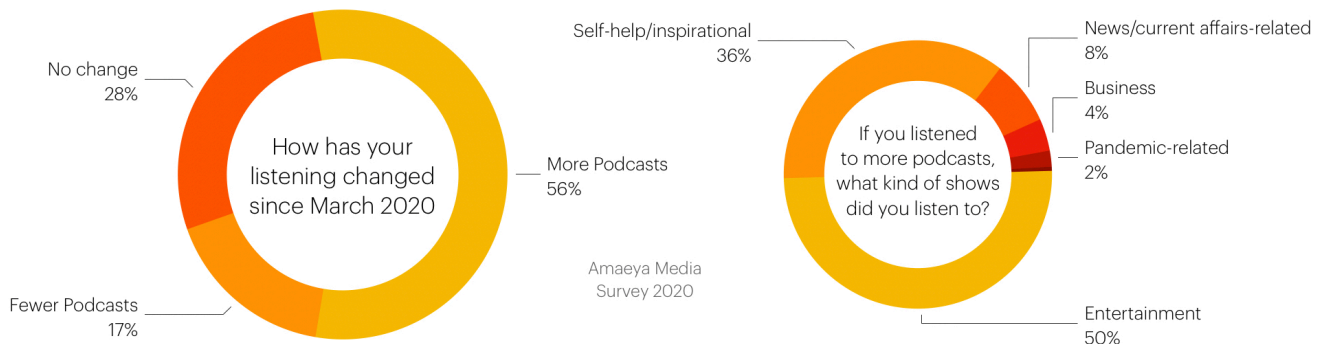
⁵ [Do podcasts and music compete with one another? Spotify.](#)



One of the big takeaways from the 2019 *State of the Industry Report* was the dichotomy of the listenership of regional versus international shows. Although there was an upward trend in listenership for podcasts overall during the year, there has not been any major change to this trend. It is tough to draw too many conclusions from this in a year like 2020, where production and outreach efforts were naturally hampered.

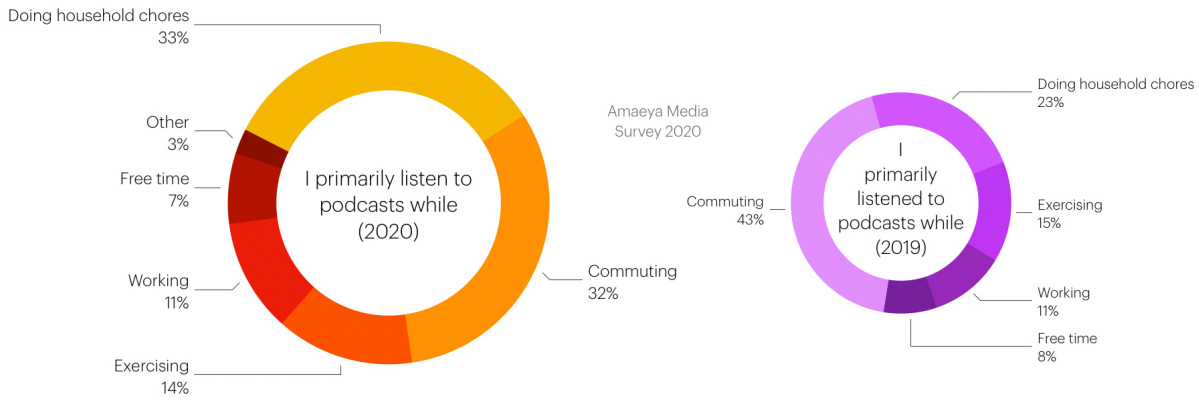
Listener preferences haven't changed all that much from last year either, and a majority of listeners still want content that is shorter than 30 mins. "Instead of listening to a 60-minute episode, listeners now follow and listen to 3-4 shorter podcasts," Fallaha added. "The preferred duration of an episode is no longer than 15 minutes."

CHANGING HABITS



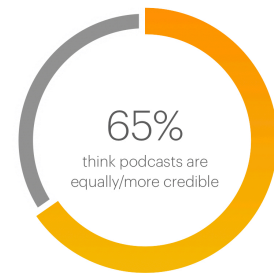
As the situation changed, listening habits changed as well. There was a shift towards more listening at home this year compared to 2019—nearly one-third of respondents said they listened mainly at home, up from 23%. This was coupled with a dip in listening during commutes, down nearly 10 points from 2019.

Over 55% of survey respondents said they listened to more podcasts since March 2020. Nearly half of those added entertainment podcasts to their listening, indicating a clear desire for more fun, lighter listening in dreary times. Self-help and inspirational podcasts came in second at 36%. Only 2% said they actually listened to anything pandemic-related.



Additionally, podcasts are considered a reliable medium for news and updates, when compared to traditional media outlets. A study by Media Monitors found that 60% felt that podcasts were either more, or much more, trustworthy in their coverage of the pandemic compared to traditional media⁶.

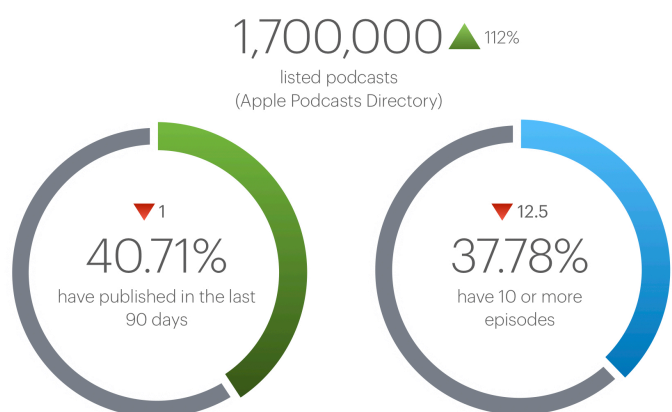
Local listeners seem to mirror this trend, with 65% of respondents to the Amaeya Media 2020 survey saying they find podcasts equally or more credible compared to traditional mediums of radio, newspaper and television.



Amaeya Media Survey 2020

CREATORS ADAPT

At the end of 2019, we noted that there were 800,000 podcasts listed in the Apple Podcasts directory. That number sits at more than 1.7 million as 2020 came to a close—more than doubling in a single calendar year. In fact, during the last 90 days of 2020, a record 280,000 news shows were added to the directory. In fact, May saw 96,537 shows register with the directory, breaking the previous record of 90,977 shows in April⁷.



Source: Podcast Industry Insights courtesy of Daniel J. Lewis. 31 December 2020

⁶ Covid-19's impact on podcasting. MediaMonitors.

⁷ Podcast Industry Insights courtesy of Daniel J. Lewis (formerly under My Podcast Reviews)

Regionally, Podo launched more than 75 podcasts with Arab celebrities, influencers and creators on their platform alone. The platform currently reports that a majority of their listeners come from Lebanon, Syria, Saudi Arabia, followed by Egypt.

As more people explored working from home, podcasts definitely became a popular medium for content creation in 2020, over any year before it.

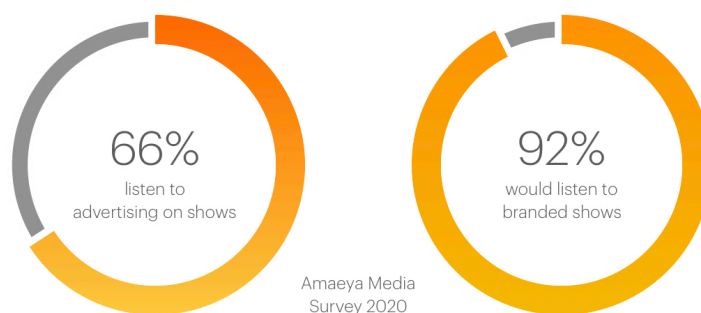
The breakdown of active⁸ to inactive didn't change too much year-on-year. 40.71% of shows are active, a drop of just 1% compared to 2019. The number of podcasts with more than 10 episodes though saw a significant drop, down 12.5 points to just 37.78% of total podcasts. This is a combination of the significant rise in new podcasts during the year, and that of changing priorities as the year continued to unravel.

We expect the active show data to see more changes next year, and a higher than usual 'podfade' rate as things normalise during 2021.

BRANDS IN PODCASTS

As discussed earlier, despite a drop in advertising revenue on podcasts during 2020, the year-on-year growth is still expected to be positive. Spotify kicked off the year with their Streaming Ad Insertion (SAI) offering, providing targeted advertising for podcasts on their platform⁹, and closed out the year with the Megaphone acquisition. This brings podcasts hosted on Megaphone as well as its advertising marketplace into the Spotify fold.

During 2020, Podo produced five shows for the organization responsible for the 2022 FIFA World Cup's operations and delivery¹⁰, showing an appetite towards mainstream organization and government support for the medium in the region.

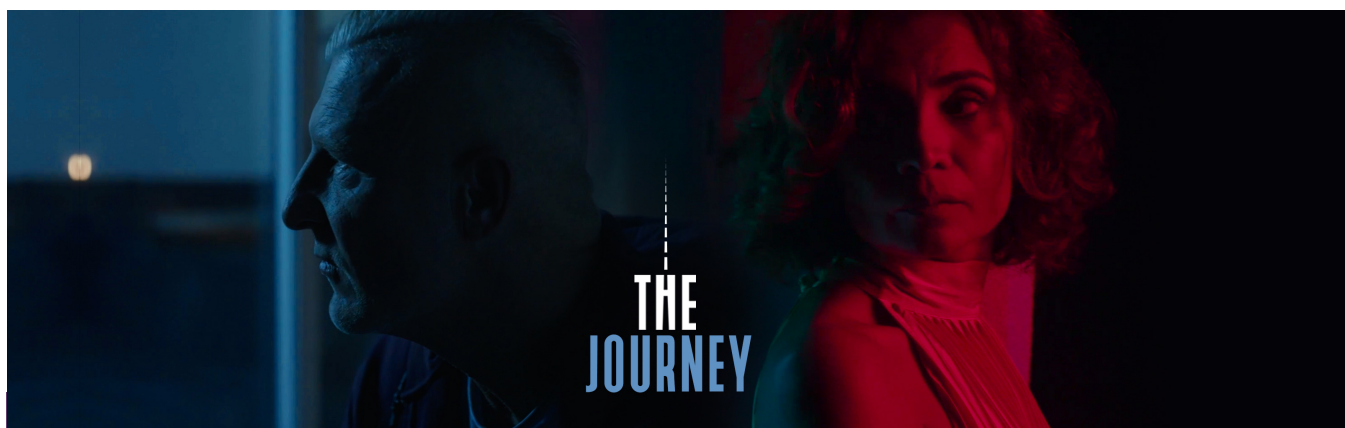


⁸ Podcast Industry Insights considers a show having published at least one episode in the previous 90 days as 'active'.

⁹ [Spotify will use everything it knows about you to target podcast ads.](#) *The Verge*.

¹⁰ [2022 FIFA World Cup podcasts.](#) *Podeo*.

Local listeners lean towards listening to ads on podcasts. A healthy 66% said that they don't skip ads, some even said they use podcast ads to discover brands. Only 9% found them truly annoying, similar to trends from 2019. This holds true for branded content as well, with only 8% saying they wouldn't want to listen to branded shows.



CASE STUDY: *The Journey*

Volkswagen Middle East launched *The Journey*, the region's first multimedia campaign featuring podcasts during 2020. The brand wanted to let its cars take a back seat for the purpose of the series and focus on the featuring raw, unfiltered and captivating personal stories of UAE-based business owners.

Volkswagen's dedicated social agency, Socialize, conceptualized and spearheaded the digital audio and video series that unravels behind-the-veil stories of entrepreneurs' journeys to finding success in their fields. A complimentary podcast, featuring the full-length story in audio format, was produced by Amaeya Media. The campaign was part of a three-phase approach that saw the launch of social media teasers, video stories on YouTube, followed by the podcast.

The campaign was a hit for the brand, garnering millions of views on YouTube, climbing the Apple Podcast charts in multiple countries including Bahrain, India, Saudi Arabia and the United Arab Emirates. *The Journey* was also recognized as a Top 10 Integrated and Activation Campaigns in their Annual 2020 series by Campaign Middle East.

MONETISATION

The Interactive Advertising Bureau's mid-2020 study¹¹ reported a 15% drop in advertising growth compared to pre COVID-19 projections, based on self-disclosure by companies. However, the year-on-year growth was still expected to be positive compared to 2019. This was further enhanced by Omnicom Media Group's announcement in July 2020 that it would spend US\$20 million in advertising on podcasts distributed by Spotify during the second half of the year¹².

With both advertising revenue and listenership taking a hit especially as we entered the second quarter of the year, podcasters worked to diversify their streams, specifically audience-based revenue. Patreon reported over 30,000 new creators signed up for the service in the few weeks of March alone¹³, and announced a US\$ 90 million round in funding in September¹⁴.

US-based podcast network Relay FM, for example, introduced show-level membership for flagship shows such as *Connected* and *Upgrade* in addition to their already running company-wide membership, while the *Accidental Tech Podcast* introduced audience membership for the first time in its 400 episode history. Jordan-based podcast company Sowt introduced their membership program 'Sowt Plus' with the option to pay up to US\$8 monthly to support their content.

// Advertising will not remain a sustainable income for creators, which will require more robust monetisation plans to cover production costs, which is why platforms are looking to silo their content. I believe the fundamental nature of RSS podcasts will eventually change for the benefit of the creator; Subscription Audio on Demand (SAoD) and Transactional Audio on Demand (TAoD) models will further emerge."

Stefano Fallaha
CEO, Podedo

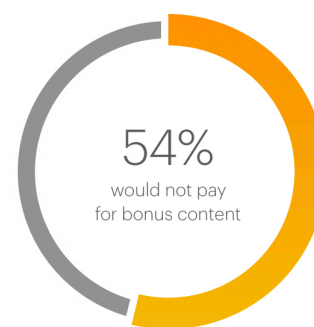
¹¹ [U.S. Podcast Advertising Revenue Study](#). Interactive Advertising Bureau.

¹² [OMG Plans \\$20 Million in Podcast Ads on Spotify](#). Omnicom Media Group.

¹³ [Patreon says more creators are signing up for accounts than usual](#). The Verge.

¹⁴ Patreon raised the amount as Series E funding, [at a US\\$1.2 billion valuation](#).

Consumers in the region though are typically reluctant to pay or subscribe to content behind a paywall. 54% of listeners said they wouldn't pay for any bonus content, while 51% of those willing to pay said they would pay \$1 monthly, setting a low bar for content-based revenue.



Amaeya Media
Survey 2020

While advertising revenue is projected to bounce back and hit the US\$2 billion target that was expected for 2020, exploring alternative revenue streams will continue to be an important challenge to tackle over the next 24 months.

AN EXCLUSIVE WORLD

The open versus closed or siloed debate has been brewing for some time, and was brought to a head in a year dominated by Spotify and exclusive content. Podcasts as a medium, including its backbone RSS, have always been decentralized, allowing creators any choice of host, and listeners a number of options to listen—from default smartphone apps to streaming services to independent apps. Jio Saavn launched a hosting product¹⁵ for podcasts, while streaming service Amazon Music joined the podcasts bandwagon during 2020¹⁶.

Spotify continued building on their acquisitions from 2019, expanding to milestone content deals during the year. The news of the Joe Rogan Experience moving exclusively to Spotify¹⁷ in May set a few cats among the pigeons, especially since the estimated US\$100 million deal also included the removal of all published content from podcast platforms as well as YouTube.

At the time, Chirag Desai, CEO at Amaeya Media, noted that “Apple had for too long been the untouched ‘father figure’ in the podcast space [...] without making any direct monetary gains from the medium. The gap was always available for someone ‘else’ to jump in with a business model and tip the scales, and Spotify is now that company.”¹⁸

Spotify went on to sign Michelle Obama and Kim Kardashian West among others. In the case of the *The Michelle Obama Podcast* however, Spotify opened up its release to other platforms after a 30-day window during which episodes remained exclusive on the platform. Prince

¹⁵ [JioSaavn YourCast Launched to help independent podcasters](#). *Economic Times*.

¹⁶ [Amazon Music now has podcasts](#). *The Verge*.

¹⁷ [The Joe Rogan Experience launches exclusive partnership with Spotify](#). *Spotify*.

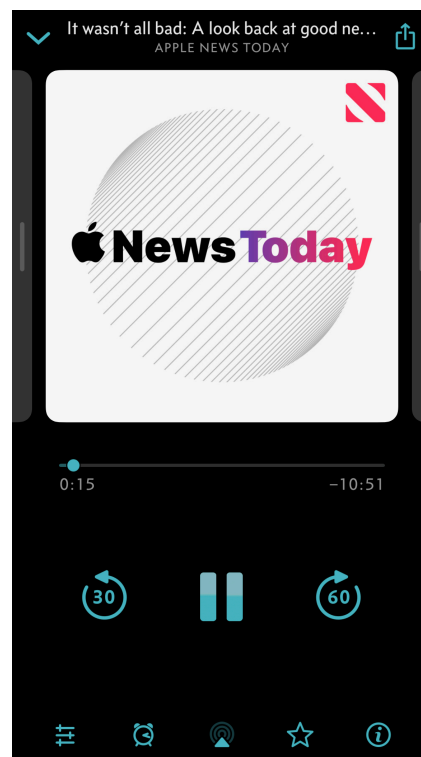
¹⁸ [The Joe Rogan & Spotify exclusive deal and what that could mean for the podcast industry](#). *LinkedIn*.

Harry & Princess Meghan's launched their audio-first company Archewell Audio, and also went on to sign an exclusive multi-year deal with Spotify¹⁹.

Apple kicked off their production efforts with the launch of *Apple News Today*²⁰ in a similar vein; while it did not have a publicly listed RSS-feed, the show itself is not locked and other players started listing it within a few weeks. News continues to circulate that Apple is exploring original content that may serve as supplementary content to their Apple TV+ service. For example, Oprah Winfrey launched *Oprah's Book Club*, a podcast that is part of a larger collaboration with the company that includes a television series of the same name²¹.

The New York Times went out and bought subscription-based audio app Audm²² and Serial Productions²³, the company behind *Serial* that was looking for a buyer in early 2020. This added to big ticket acquisitions this year including Spotify's Megaphone purchase, and Amazon Music's acquisition of Wonderly²⁴, with the goal to further create exclusive content.

In a nutshell, the traditionally open world of podcasts was met heads-on this year with platforms working on siloed content and shows, with or without a paywall. Last year, Luminary received flak from creators for attempting to paywall content behind their subscription plans in 2019²⁵, although services like Stitcher have offered free-to-air podcasts and a premium tier for ad-free or exclusive content for a few years.



Apple News Today on Overcast

¹⁹ [Spotify's New Multiyear Partnership with The Duke and Duchess of Sussex's Archewell Audio Promises Podcasts That Will Inspire](#). Spotify.

²⁰ [Apple is launching its own daily news podcast to compete with The Daily and others](#). The Verge.

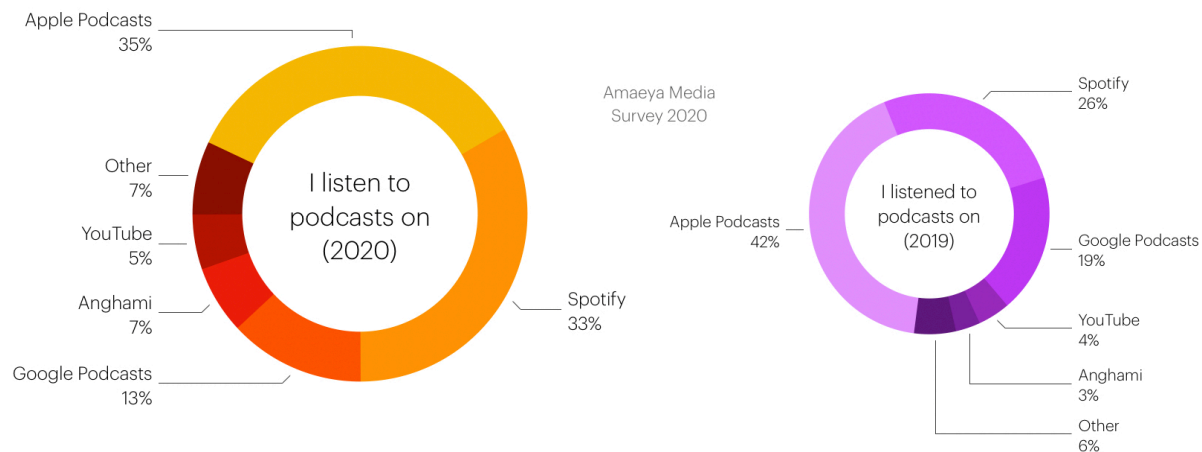
²¹ [Oprah Just Launched a New Oprah's Book Club Podcast, Kicking Off with Caste](#). Oprah.com.

²² [The New York Times acquires Audm](#). The New York Times Company.

²³ [The New York Times is acquiring the podcast studio that created Serial and S-Town](#). The Verge.

²⁴ The deal is [estimated at US\\$300 million](#), purchased as part of Amazon music.

²⁵ An experiment largely regarded as failed, with Luminary reportedly [incurring monthly losses of US\\$4 million](#). This is despite raising US\$30 million in May, which came at a valuation lower than their previous round.



In terms of listenership, these moves seem to have a positive impact for the platforms themselves. Spotify noted in their yearly review that more 18-24 year olds listened to a podcast on their platform for the first time during 2020²⁶, with similar trends in India²⁷.

Spotify gained locally as well, seeing a seven-point bump in being the preferred podcast player compared to last year and closing in on Apple Podcasts' traditional lead in the region. Anghami also saw an improvement in their share of listenership compared to 2019, while YouTube still remains in contention as a place to consume video versions of podcasts. This is also a consequence of the year, with more creators recording their shows over platforms like Zoom this year. As shows return to in-person recordings over the year, this may change however.

As much as we can draw parallels to the streaming world—where Netflix, Apple, HBO and Disney have been gearing up for quite the battle—and a future where platforms charge a subscription to access exclusive content on top of 'free-to-air' shows, this also starts to challenge the fundamental meaning of what a podcast is to begin with. Podcasters would argue that a show without an openly available RSS-feed isn't a podcast at all, yet general public understanding of a podcast seems to be an 'audio show', even as that itself is being challenged by the podcasts-on-YouTube phenomenon.

Even as more companies follow Spotify's lead, the real impacts of this tussle may take some time to really take shape, especially for creators. For example, workers from Gimlet Media and The Ringr unionised in 2019 in order to protect their rights. They were joined this year by podcast production company Parcast²⁸—all three companies are acquired by Spotify.

²⁶ [The Trends That Shaped Streaming in 2020](#). Spotify.

²⁷ [New insights reveal podcast patters in India](#). Spotify.

²⁸ [Parcast announces it is unionizing](#). Twitter.

Further, the creators of Gimlet's *The Nod*, Brittany Luse and Eric Eddings, were vocal about their loss of ownership of the show's brand due to the acquisition²⁹, something they realized they needed to address when they wanted to expand the show beyond just the podcast during the pandemic. Other podcast creators also found Spotify's podcasting section carrying bootlegged versions of popular songs³⁰, while Anchor has been plagued with a high degree of podcast piracy since they are able to bypass Apple's approval process³¹.

// For one of the last bastions of the open web though, the implications of this model becoming successful—such that we start seeing the same divide between the indie and the mainstream as we do in nearly every other medium today—is disappointing. And while I do think that podcasting's roots are deep enough that this may be just a blip in the radar—we already know what happens once mainstream funding starts driving a medium's long-term growth."

Chirag Desai
CEO, Amaeya Media

Spotify was also at the receiving end of backlash due to content published by the Joe Rogan Experience³² after the show moved to the platform. While Spotify took a position defending the expression of the creator in this case, instances such as these continue to bring to light questions about how much a platform would have to police or control content on their platform especially when exclusive or siloed, and where those lines may need to be re-drawn.

These are all elements to watch out for as the on-going consolidation finds some equilibrium in 2021, while the economic viabilities of this approach will be put to the test.

²⁹ [The hosts of The Nod want Spotify to hand over their podcast](#). The Verge.

³⁰ [Spotify's Podcasting Problem: Loophole Allows Remixes and Unreleased Songs to Hide in Plain Sight](#). Variety.

³¹ [How to pirate someone else's podcast on Anchor](#). Podnews.

³² [Joe Rogan's Podcast Sparks Tensions Inside Spotify](#). The Wall Street Journal.

STANDARDISATION

We noted the challenges related to standardisation of podcasts last year, especially as the medium is fundamentally decentralised. More mainstream efforts have been in the works over the last couple of years, with the Interactive Advertising Bureau (IAB) building a podcast measurement standard through their technical group comprising 64 member companies. Version 2.1 of the standard was up for public comment until 31 December 2020, so this should evolve over the course of the coming year.

Podcast companies Spreaker, Empire Streaming, Chartable, OmnyStudio, Megaphone, Captivate, PodBean, Buzzsprout and Anchor achieved compliance during 2020, taking compliance with the 2.0 version of the standard to 20 companies³³.

We noted last year that Chartable was working to bridge some of the gaps due to decentralization by working to unify podcast listener data across platforms. The company achieved compliance with the IAB 2.0 standard for podcast measurement during 2020. This would mean that even if a podcaster's hosting service has not chosen to, or not-yet achieved compliance, they would still have IAB certified stats using Chartable's tracking service.

We also noted last year that alternative mechanisms were also in the works, such as that of the Open Podcast Analytics Working Group³⁴, which continued to provide updates to their list of podcast user-agents in 2020 for more standard and consistent identification by podcast hosting platforms.

Efforts such as these are a good case-study of platforms, publishers and even creators working together for best-practices and standardisation for the industry, as standardisation needs to be attainable by everyone—whether they are part of larger entities or independent.

"I'm not that excited about standardisation projects that are merely revenue generation tools, or those that exist to deliberately freeze some parts of the industry out," notes James Cridland, Editor of Podnews. "Those are part of the radio industry, but I hope don't become long-term parts of the podcasting industry. In particular, as a global industry, we need global representation when setting standards, not a US colonialism foisted on the rest of the world."

³³ [Compliant Companies](#). Interactive Advertising Bureau.

³⁴ <https://github.com/opawg>

THE PODCAST INDEX

One of the interesting developments during 2020 was the set up of The Podcast Index as a decentralised, categorised podcast directory that is intended to always be available for free. Noting specifically that “Apple is a very centralized private entity that is controlling pretty much what everybody considers the default yellow pages for podcasting,”³⁵ Adam Curry—who was part of the initial meeting that led to the creation of the medium twenty years ago—launched the Index with Dave Jones.

Since then, various podcast hosts now publish podcasts on their platforms to the Index, which reports 1.2 million podcasts within its directory as of December.

The efforts have also expanded into discussions about the podcast ‘namespace’—tags that podcast platforms can support for creators, and podcasts apps can also make available for listeners. While this has typically been initiated by Apple so far³⁶, the Podcast Index is continuing discussion for new tags that can be added to feeds. One such example is `<podcast:locked>`, a tag to help prevent unauthorized transfers of a creator’s podcast feed into a platform, aimed at preventing the piracy problem discussed earlier.

The Podcast Index can quickly become the de-facto directory for podcasters and for podcasts apps, while retaining the essence of the medium as an open, collaborative space as an anti-thesis to the headlines this year. The Index and its namespace work will also help standardise creator and listener experiences.



It's probably a fair criticism that innovation in podcast apps and delivery essentially stagnated as soon as Apple got on board. What's exciting to watch with Adam and Dave's Podcast Index work is that they're getting engagement from a number of great people who are all keen to get things done, rather than play politics with endless meetings. I've been involved with some new tags and think it's a helpful step forward. I look forward to others playing their part.”

James Cridland
Editor, Podnews

³⁵ As mentioned on the new podcast, [Podcasting 2.0](#), where the Index was announced, and continues to be discussed.

³⁶ The last update to the RSS specifications was August 2017, which added support for adding season and episode numbering, as well as tagging episodes as trailers, or bonus episodes.

THE PODCAST ACADEMY



Lopez announcing the Podcast Academy. Image: Podcast Movement

During his keynote address at Podcast Movement in February, Wondery CEO Hernan Lopez, announced the launch of The Podcast Academy, to parallel member-based not-for-profit organisations such as The Academy of Motion Pictures Arts & Sciences, The Television Academy and others to reward quality in their respective industries³⁷. “Podcasts are in this unique position where a podcast created by a single person can beat a show produced by a big company,” he noted.

The Academy went on to launch their membership program, and announced that the first edition of the Academy’s awards for excellence in audio, The Ambies, will be awarded in March 2021³⁸. Sixteen show categories and seven talent categories will make the first edition, which includes a Governors’ Award.

Cridland hopes the Academy will also be able to set their sights on bigger things, including contributing towards best practices and standardisation towards the industry. “Sadly, that doesn't seem to be the focus of the organisation - but perhaps once the first ceremony for The Ambies has taken place, we can see more appetite for this best-practices work,” he added.

³⁷ [The Podcast Academy wants to be the Academy Awards for Podcasting](#). Forbes.

³⁸ [The Podcast Academy announces “The Ambies”](#). The Podcast Academy.

CONCLUSION

Twenty years in, 2020 looked to be a golden year for podcasts. And in many ways the year was significant. On the one hand, we saw Spotify and others consolidate the medium through acquisitions, and on the other, independent podcasters collaborated to set up new namespaces, and explored diversification with ad revenues taking a hit as a direct outcome of the pandemic.

Our survey indicates that the general trend for podcasts during the year was upward, with more listening becoming the norm. Spotify's study also highlighted that people just made more time to listen to podcasts compared to cutting into music listening time. Although the shifts were slower than expected this year, there is also a growing appetite for more diverse voices to join the medium.

There is little doubt that audio will continue to play a significant role in our future. In the tech world, we saw the launch of Clubhouse, an audio-only social networking app open up to the public, while Twitter launched voice-based Spaces in private beta in December.

For the region, the possibility of further investment in the medium is par for the course now, and the outcome of holding back during 2020 might serve as a tipping point for brands and companies to explore podcasts as the cost-effective option for both content creation, and brand awareness through marketing.

James Cridland, Editor of *Podnews*, believes the biggest challenge facing podcasting is that "the main provider in this space, Apple, is asleep at the wheel. That rarely ends well." The increased consolidation among the other platforms might actually make 2021 the year that changes.

APPENDIX A

METHODOLOGY

Amaeya Media conducted its 2020 survey to better understand the regional podcasting landscape and to build on the findings of our 2019 State of the Industry Report. The focus was on understanding listener behaviour, identify key trends specific to the region and see how this behaviour was impacted by the pandemic and related lockdowns.

The survey was distributed through Amaeya Media's social media channels and referrals along with paid social media posts. The survey ran during the months of December 2020 and January 2021.

Nearly 71% of those who completed responses were based in the United Arab Emirates. Nearly 45% of the respondents were between 19 & 25 years old, with nearly 49% respondents being female and 51% male.

A total of 467 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 respondents 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. How much time do you spend listening to podcast every week?
 - 2.1. <2 hours a week
 - 2.2. 2-6 hours a week
 - 2.3. >6 hours a week
3. Do you listen to any local podcasts? If so, which ones?
 - 3.1. Yes <dialog box>
 - 3.2. No, I listen to international podcasts only
 - 3.3. No, but I would like to listen to them in the future

Listed below are some statements. Please choose the response that is the most relevant to you:

4. I listen to podcasts while
 - 4.1. Commuting
 - 4.2. Working out
 - 4.3. Doing household chores
 - 4.4. Working
 - 4.5. Others <dialog 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 <dialog box>
- 6. I listen to podcasts on
 - 6.1. Apple Podcasts
 - 6.2. Google Podcasts
 - 6.3. Spotify
 - 6.4. Anghami
 - 6.5. Other (such as Overcast, Castro, Pocket Casts)
- 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. Often
 - 9.2. Once in a while
 - 9.3. Never
- 10. I find podcasts
 - 10.1. More credible than radio, newspaper, tv
 - 10.2. Equally credible compared to radio, newspaper, tv
 - 10.3. I don't trust everything I hear
- 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 <dialog 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
- 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 podcast (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
- 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
- 16. How has covid changed your podcast listening behavior
 - 16.1.I stopped listening to podcasts
 - 16.2.I listen to fewer podcasts
 - 16.3.No change
 - 16.4.I've listened to more podcasts compared to before March
- 17. What kind of shows do you like to listen to (pick the highest preference)
 - 17.1.I prefer shows where the host & guest casually chat about the topic (ex Joe Rogan)
 - 17.2.I prefer shows where the same hosts come back to chat each episode
 - 17.3.I prefer well-produced shows where the host shares the best parts of the interviews
 - 17.4.I prefer more narrative-based shows and documentaries about topics
 - 17.5.I don't have a preference as long as the content is good

If no, the following series of questions were asked:

- 18. What's the reason you don't listen to podcasts?
 - 18.1.I'm not sure what it is / how to listen
 - 18.2.It doesn't interest me
 - 18.3.I don't have the time to listen
 - 19. What would convince you to listen to a podcast?
 - 19.1.Good local content / relevance
 - 19.2.A way to discover good shows
 - 19.3.Someone would guide me how to get started / what to listen to
 - 19.4.Other: <dialog box>
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