

Results and Analysis of the RPG Podcast Listeners Survey 2011

Highlights:

- ◆ We had a larger number of respondents this year, but demographic distribution is largely unchanged from 2010
- ◆ Survey respondents continue to be better educated and more highly compensated than the general U.S. population
- ◆ Individual podcast listeners appear to be stabilizing at an average of 3 to 5 podcasts that they listen to consistently
- ◆ iTunes continues to dominate the podcast download market - new podcasters should not miss out on reaching this audience
- ◆ Podcasters are their own best advertising - most listeners learn about new podcasts from other podcasts they are already listening to
- ◆ Podcasters, you only get 1 to 3 podcasts to win an audience
- ◆ D&D continues to dominate the table-top RPG market, but D&D 4E is actually *losing* ground to Pathfinder and D&D 3.5
- ◆ Availability of new product appears to be the primary driver of spending on games
- ◆ Podcasters have a large influence on the game purchasing habits of their audience

Survey created by David Pinilla

Analysis prepared by Scott Dunphy with assistance from David Wendt

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Purpose

The purpose of this survey is to gather data on table-top RPG podcast listeners, their listening habits, and their gaming habits. In addition to providing valuable feedback on the listening audience, these gamers also represent a sample of the broader table-top RPG population. Hopefully the entire table-top RPG community will find these results useful and relevant.

It is not the intent of the survey to promote any particular podcast or game system. Any perceived bias towards or against any podcast or game system is unintentional. While the results may have favored the shows (and possibly the related systems) that promoted the survey, all RPG podcasters were asked and encouraged to promote the survey. Since there is no budget associated with this survey, promotion through podcasts and associated websites is the most efficient and effective method to gather a meaningful sample size.

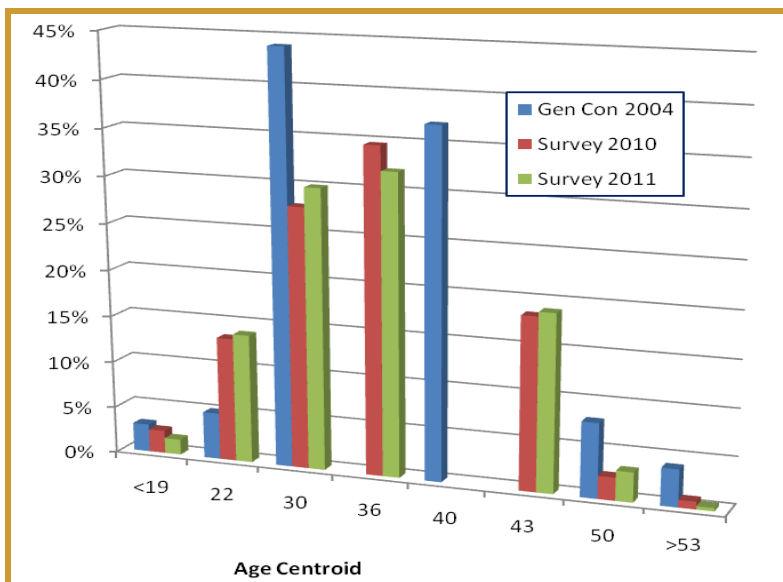
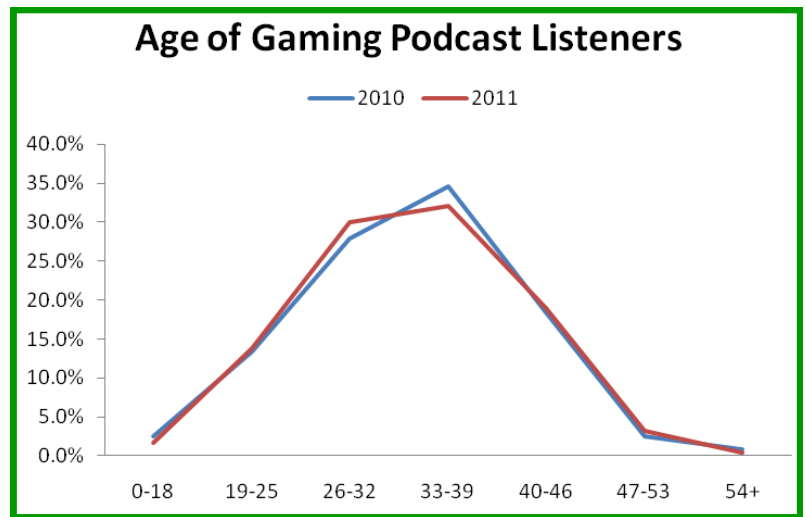
2011 Survey Questions: <http://rpgpolls.com/index.php?/fill/survey/18>
 2010 Survey Results: http://storysh tick.spookyouthouse.com/files/Podcast_Listener_Survey_Results_and_Analysis_2010.pdf
 2009 Survey Results: http://storysh tick.spookyouthouse.com/files/Podcast_Listener_Survey_Results_and_Analysis_May_09.pdf

Who Are the Listeners?

This year, we received **850** unique responses to the surveys (almost double last year's 492). Since state-wide polls for US political races use a sample size of at 500 or greater, our listeners should also provide a representative sample of the table-top gamer population.

To the right, you can see the age range of the listeners from this year and last year. The vast majority of listeners — **62%** — are between the ages of 26 and 39.

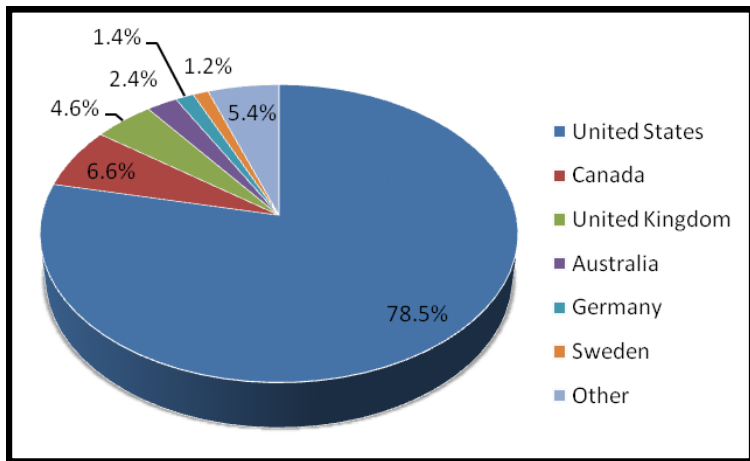
Below we compare the survey results from the last two years to the Gen Con age statistics from 2004 (the most recent data available).



The Gen Con data was reported in different age ranges than our survey, so I calculated the centroid for each age range and matched them as closely as possible. Also, only 68% of the Gen Con attendees in 2004 played RPGs whereas our survey is focused on roleplayers. This data is presented to show the similarities in age distributions between our survey and Gen Con's attendees.

51.5% of survey respondents (aka listeners) are married and 50.3% of the US population is currently married. Only 51 respondents (6%) were female. This is a lower percentage than last year, but more overall female responses. This is still a large enough sample for basic statistical testing and we can use it to compare women's listening and gaming habits to men's.

Who Are the Listeners? (Cont)

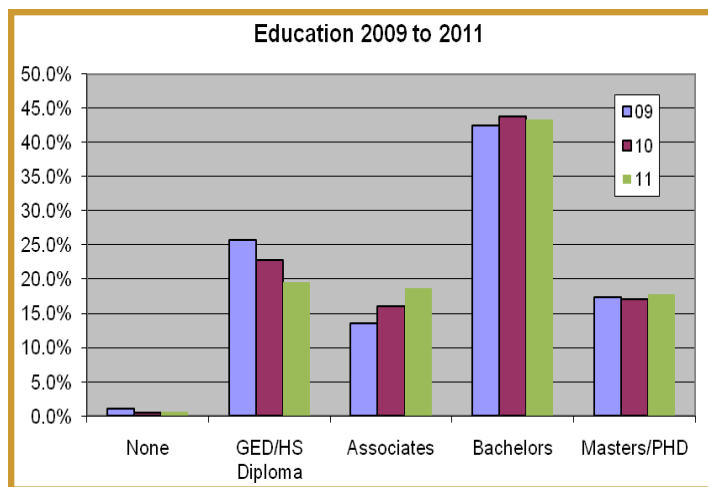
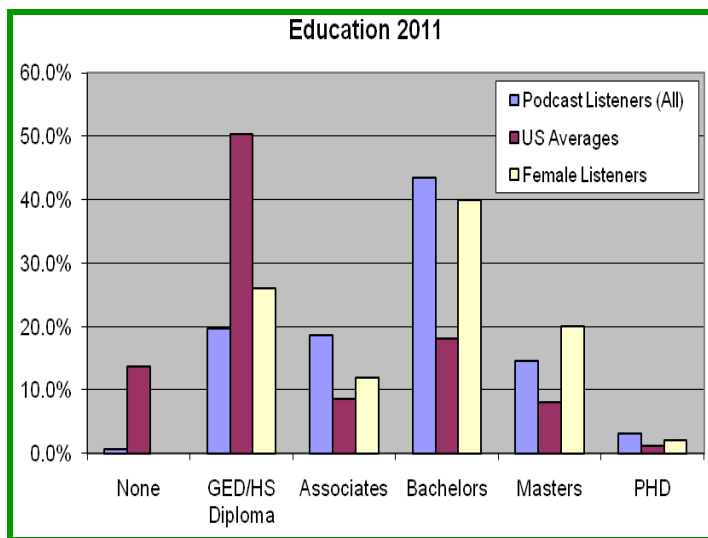


This year we asked listeners to tell us what country they are from. The countries with the most respondents are shown to the left. In addition, **92.6%** are from English-speaking countries, **11.2%** are from Europe, and **2.5%** are from Scandinavian countries.

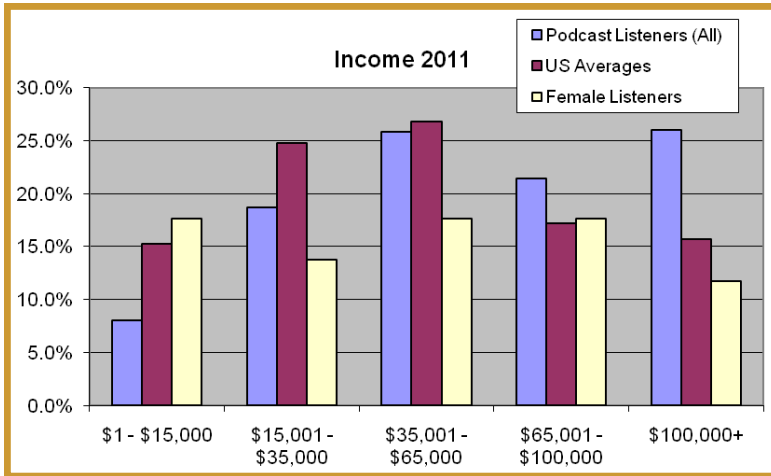
Listeners were also asked about their education and income. These results are compared against US averages despite the fact that many participants are not from the US. Furthermore, these US averages are from 2008 for income data and from 2010 for education (the most recent available from the Census Bureau).

As you can see from the chart on the right, RPG podcast listeners are very well educated compared to the US population – the women generally more so than the men. It would appear that table-top RPGs and podcasts about them appeal to the better educated!

In the “Education 2009 to 2011” chart, we compare the survey data from 2009, 2010, and 2011. You can actually see the increase in the educational level of listeners as fewer each year didn’t finish High School, and more each year have attained at least and Associates degree. We see those listeners leaving the GED/HS Diploma category and an almost identical increase over the same time period in the Associates degree category while the top two levels remain about the same. This the most pronounced change in the education level of listeners, and it’s curious because the majority of listeners are well beyond typical college age. It may show that RPG podcasting hit a peak with younger listeners a few years ago and as those younger listeners continue their education they aren’t being replaced by new young listeners in their late teens. The age data in the bottom two categories on the previous page supports this theory as well.



Who Are the Listeners? (Cont)

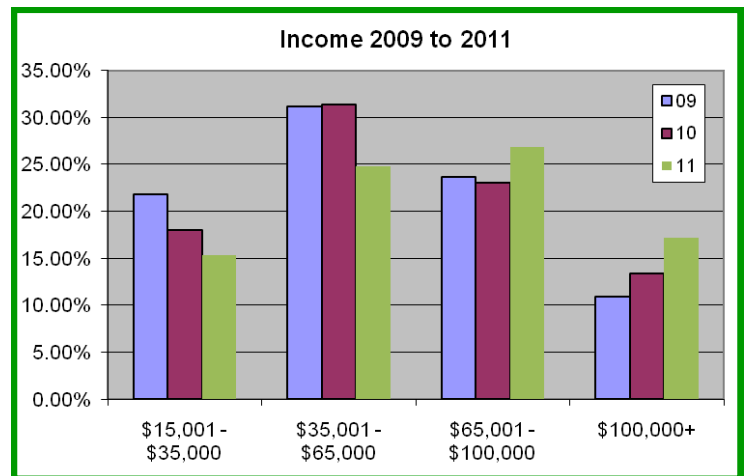


RPG podcast listeners are considerably better paid than the typical US resident. The fact that more than a quarter of RPG podcast listeners earn more than \$100,000 a year show that audience has purchasing power that should not be ignored by gaming companies.

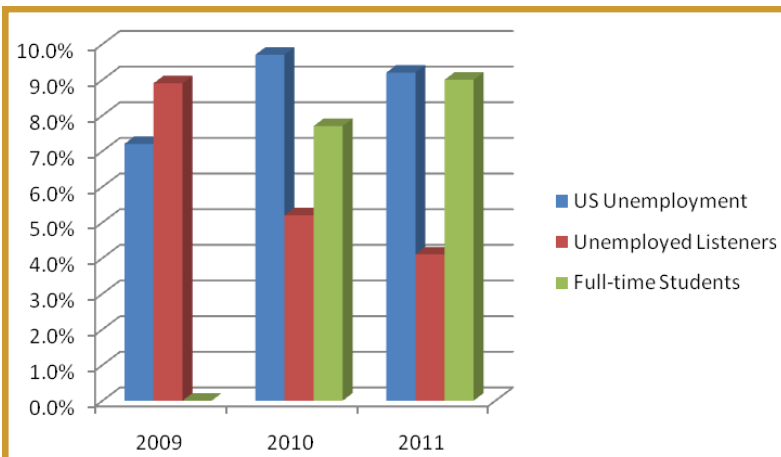
It might appear from this year's data that female listeners are under paid, but last year they appeared to be much better paid than the average listener. This is due to the relatively small female sample size in both sets of data.

Note: The listeners columns in this chart do not add up to 100% because the unemployed and full-time student listeners are represented separately in the final chart on this page.

To the right we compare income data across the three years of the survey. For two years in a row, we've seen strong directional changes in the \$15,000-\$35,000 and \$100,000+ brackets. And this year we can see a big move from the \$35,001-\$65,000 to the \$65,001-\$100,000 bracket. Listeners appear to be leaving the lower brackets and entering the higher brackets. Lower unemployment among listeners (see below), higher education, and increasing age all factor in to this result. The impact of this steady increase in listener incomes will be seen in the spending habits section as well.



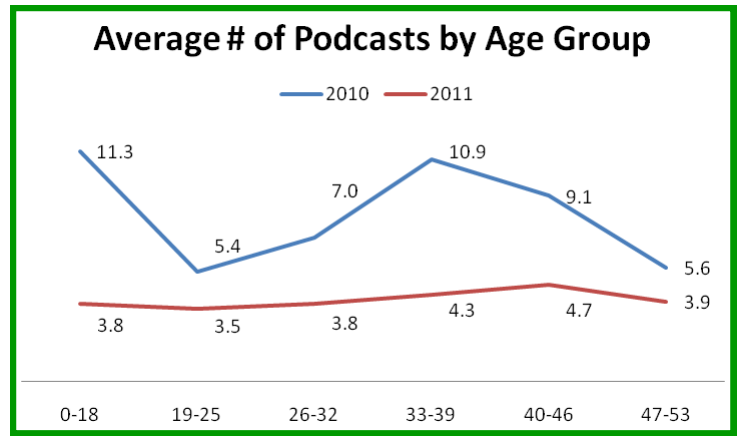
In the chart to the left we can compare listener unemployment numbers and full-time student status from the survey to US unemployment statistics in the same time frame (we added the full-time student category in 2010). You can see an increase in the percentage of listeners that are full-time students while listener unemployment decreases during a period where US unemployment remains high. Since we have a slightly lower percentage of young people in the 2011 survey sample, this could be the result of unemployed listeners pursuing educational opportunities and leaving the job market.



How Do They Listen?

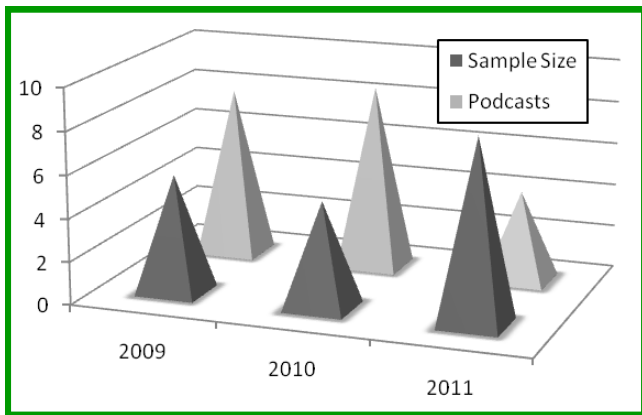
Each year we ask several questions about our podcast listening habits. With the increased sample size this year, it appears that we have reached beyond the hardcore RPG pocast fans and reached many listeners that subscribe to few podcasts. Last year it appeared that were significant differences in listening habits between different age groups, but this year the same line is almost flat.

In the chart below you can see the inverse effect the sample size has on the average number of podcast subscriptions. "Sample Size" is reported in hundreds (i.e. 5 = 500) to scale with the average number of subscriptions in this chart.

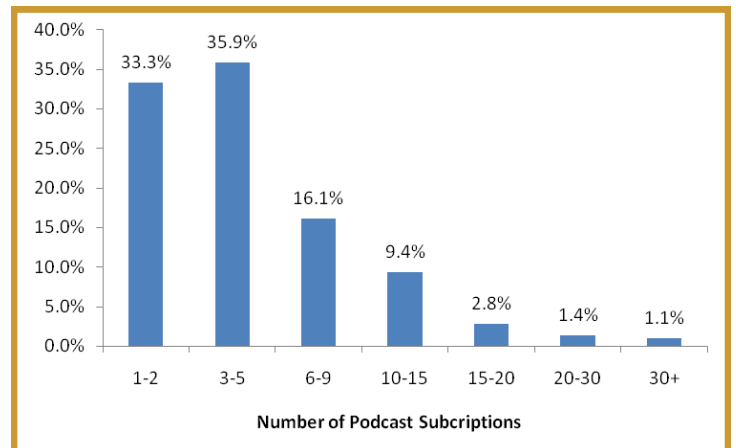


Another possible conclusion is that there has been a precipitous drop in RPG podcast listenership. But we know from download statistics from several shows that this is very unlikely. Furthermore the few listeners that follow a very large number of shows have a greater impact on the calculation of an average when there is smaller sample size.

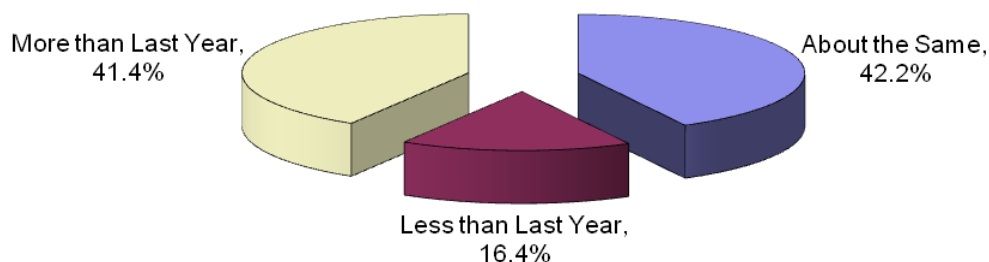
This year we asked listeners how many podcasts they subscribe to in two different ways—an open field as in previous years and a drop down with ranges to choose from. The result from the second method is presented in the chart below.



Each year we ask listeners to tell us if they listen to more, fewer, or about the same number of podcasts as they did last year. There wasn't a significant change in the results for this question from the previous year. In fact, the vast majority of listeners (83.6%) once again report that they listen to the same number of shows or more than they did last year. This is the final piece of data we need to prove that changes in the podcast subscription numbers are a result of reaching more listeners that follow fewer shows.



Podcast Listening Frequency '10 vs. '11

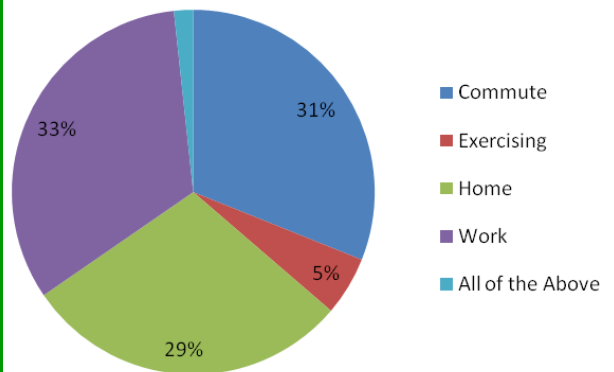


How Do They Listen? (Cont)

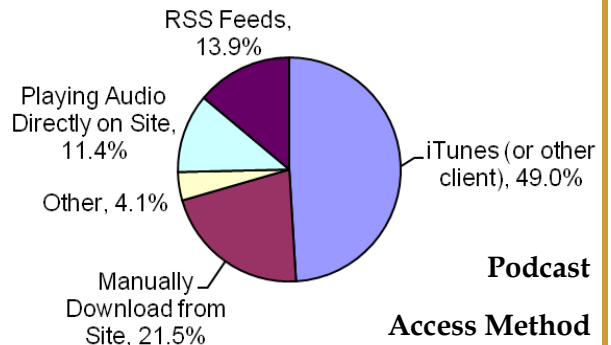
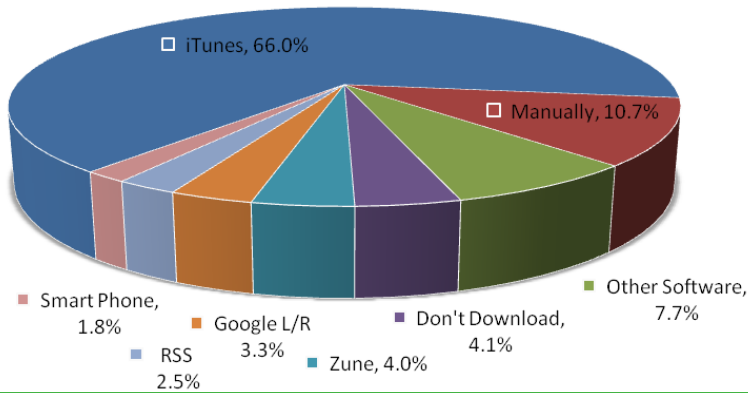
Once again we asked where listeners listen to RPG podcasts. The vast majority listen at work or on their commute. This result is very consistent with last year's.

Another chart that is almost unchanged from last year is "Podcast Access Method". But this year we asked a related question, "How do you manage your downloads?" and that produced a somewhat different result.

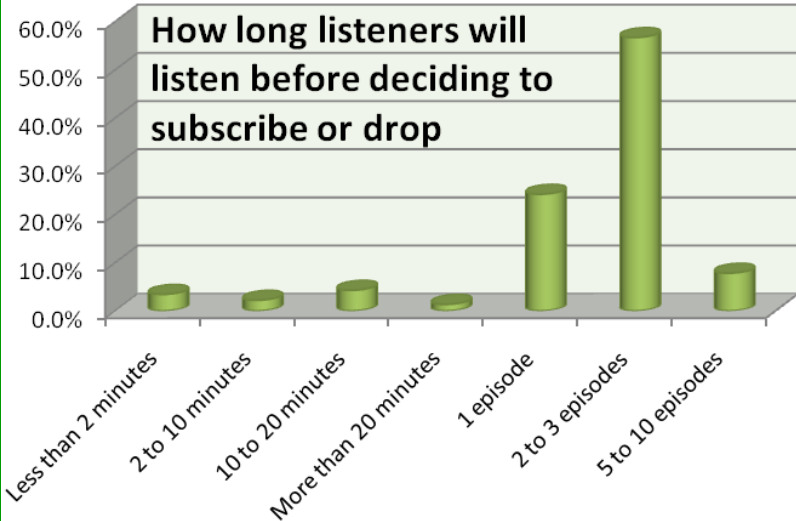
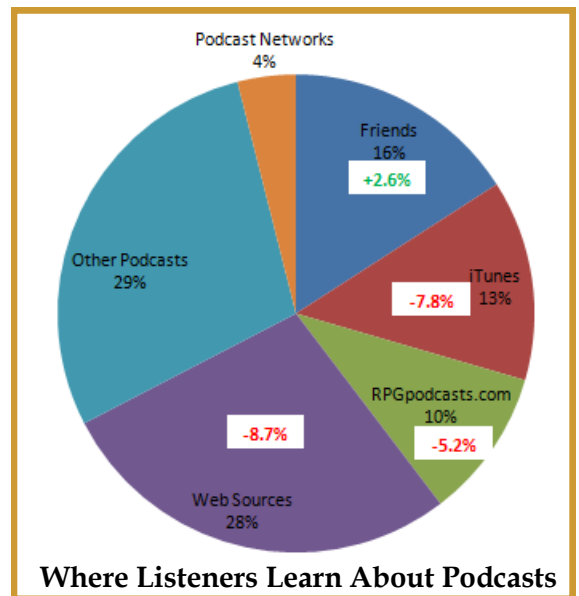
Where Listeners Listen



Managing Downloaded Podcasts



A new option was added for the "Where Listeners Learn About Podcasts" questions - **Other Podcasts!** This was clearly a major source for listeners to discover new shows as it scored 29%. Several other categories decreased significantly from last year with the amount of loss shown in red. Apparently word of mouth from friends about RPG podcasts has increased over the last year – a trend we certainly hope continues!



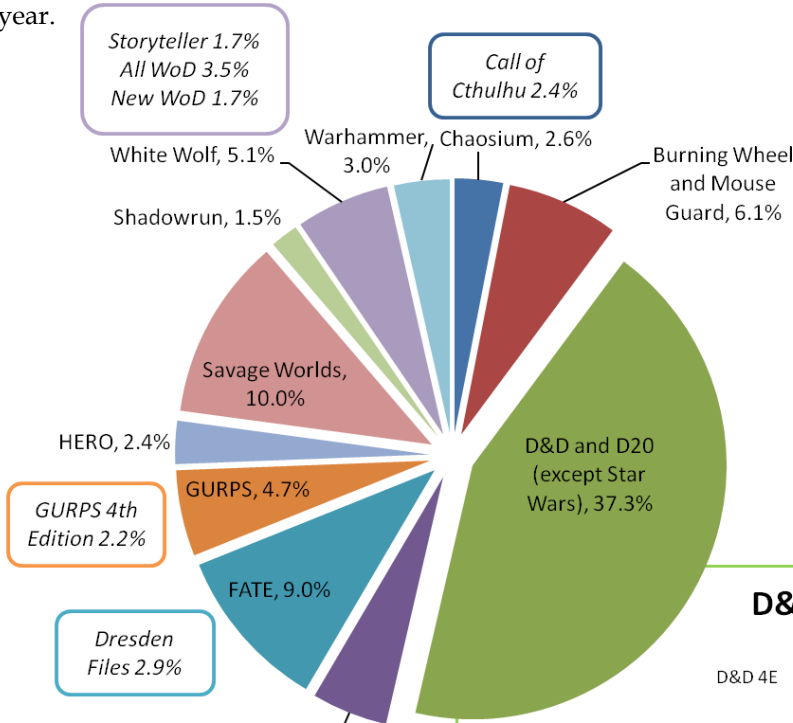
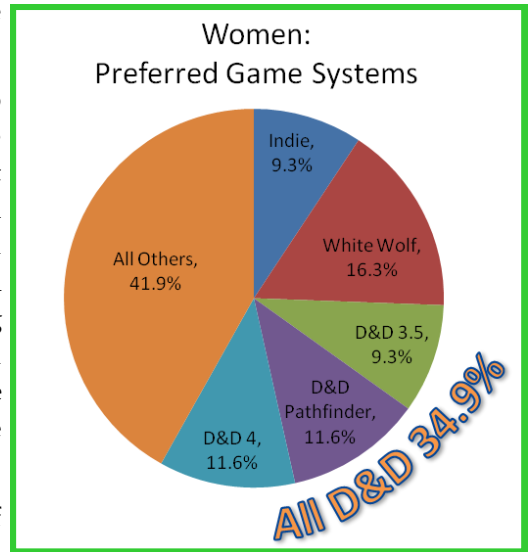
Another new question this year attempted to determine how long listeners will listen to a new podcast before they decide to subscribe to it. Fortunately, the 89% will listen to at least one entire episode and the majority listen to two to three episodes before they decide.

The “Preferred Gaming System” is an open input field – i.e. the survey respondents can answer in any way they like. In order to derive meaningful data, I do my best to interpret responses and consolidate games by system, sub-system, version, and company as appropriate for each case. There were many more gaming systems listed than are on the chart below. A game needed to garner at least 1.5% of all listeners and be distinct from another game system or version to make it onto the chart.

While there are a many valid ways to interpret and present this data, I try to make meaningful comparisons and call out important bits of data. But there will always be judgment involved in any such analysis. For instance, what constitutes an “Indie” or “Story” game is a subject that could be debated endlessly. The purple box below lists all the games that respondents entered that I consolidated into that category. I tried to use the standard of an independently published RPG, but I listed Luke Crane’s products – “Burning Wheel” and “Mouse Guard” – as their own category. Also, many FATE and FUDGE games are independently published as these are open-source game systems. But it’s more meaningful to present them together to show the influence of the system rather than their publication method.

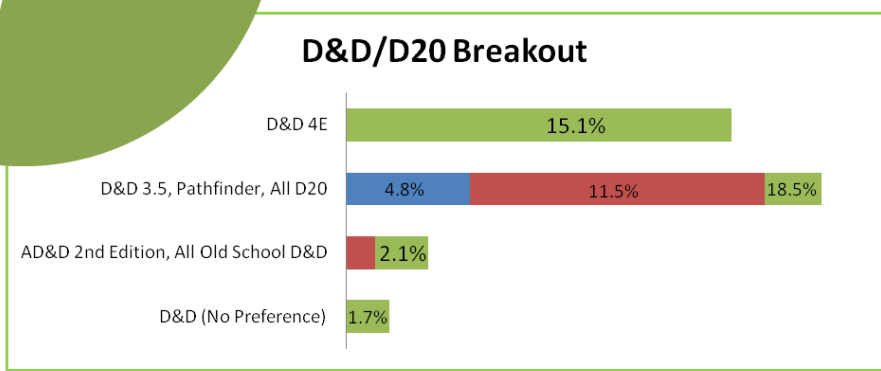
Once again this year, the small sample of female gamers made analysis of their preferred systems more challenging. A game needed 10% of the women surveyed to make the chart or it was lumped into “All Others”. This year’s data for systems preferred by women does not correlate well to last year’s result which could mean we had a largely different set of women complete the survey this year.

What Games Do They Play?



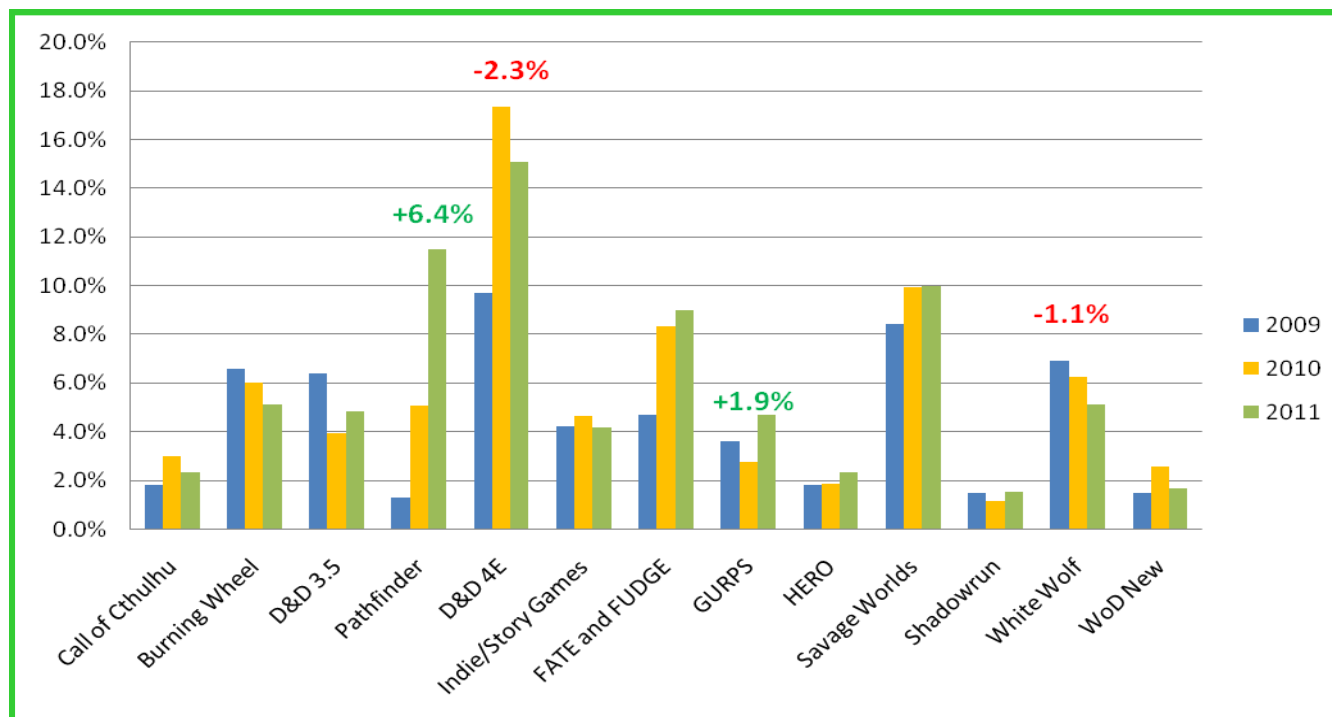
Note that the survey asked “Please list your preferred gaming system, include edition if applicable.” It did not ask for an “all-time” favorite or what game you are actually playing most frequently. It’s possible that many people listed something they rarely play or possibly haven’t ever played. The intent was to determine what games gamers are most interested in—the ones they are most likely to spend time and money on and listen to podcasts about.

Amaranthine, Apocalypse World (1.4%), Dogs in the Vineyard, Dread, In a Wicked Age, Indie, InSpectres, Lady Blackbird, Monsters and Other Childish Things, Parsley, Primetime Adventures, Shadow of Yesterday, Sorcerer



Pathfinder = D&D? Yes, I consider Pathfinder to be a version of D&D despite being produced by a different company. Pathfinder, OSRIC, and other systems based on older D&D editions are still showing support for the greater D&D brand.

What Games Do They Play? (Cont)

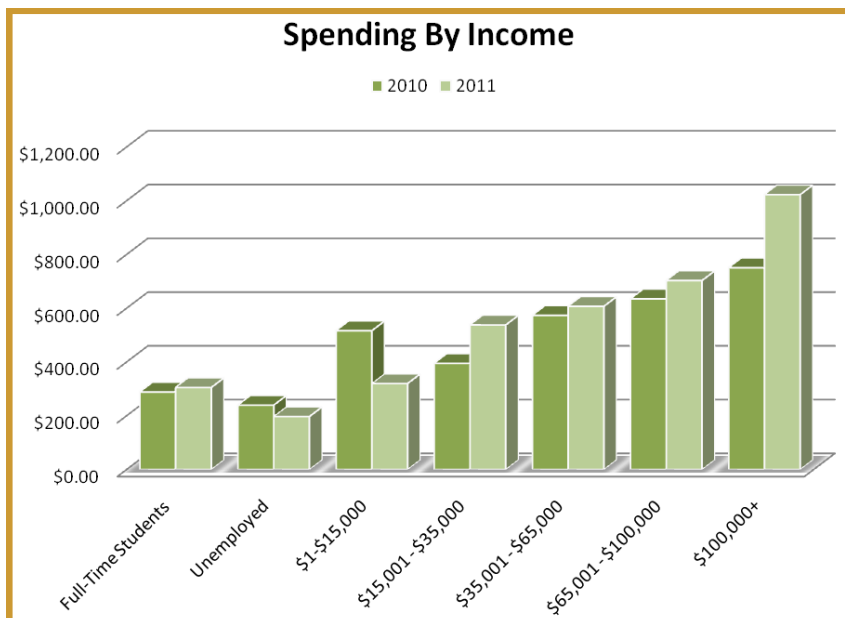


Above are the major RPG systems and groups from the last three years with the largest gains and losses from last year to this year indicated in green and red. Star Wars and D20 (as it's own system) both fell below 1% this year and off of this chart.

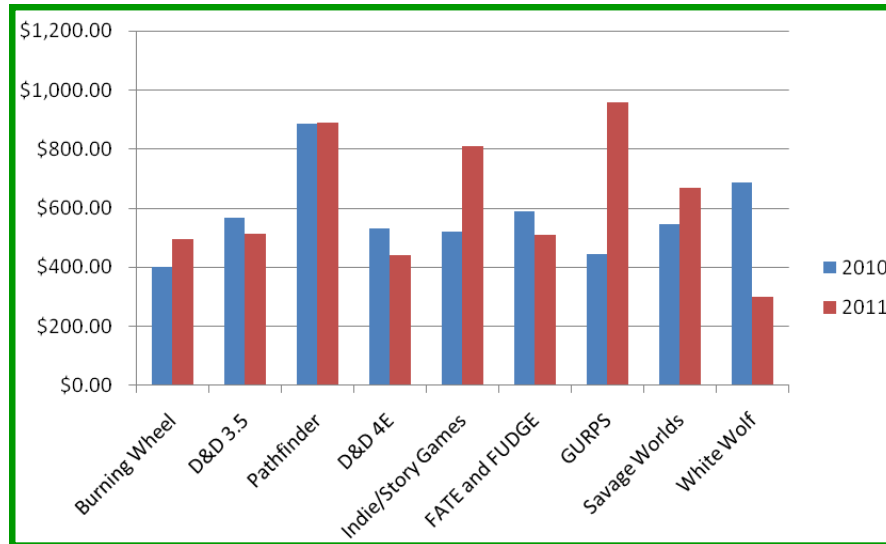
While GURPS had a big gain due to the release of a new version and White Wolf games have shown a steady downward trend likely due to a lack of product over this time period, the most striking result is Pathfinder's massive increase and D&D 4E's steep decline. It's also worth noting that D&D 3.5 actually increased this year when it appeared to be fading away fast in 2010. If you add Pathfinder and D&D 3.5 together they surpass D&D 4E by 1.2%. This seismic shift in RPGs was also felt at Gen Con 2011 where there were 232 scheduled games of D&D 4E compared to 251 for Pathfinder and 77 games of D&D 3.5.

In addition to preferred gaming system the survey also tries to ascertain how listeners spend their gaming dollars by asking how many US dollars they spend on tabletops games annually. This number could include minis and board games as well as RPGs. This year's average was **\$621.92**. The averages for 2010 and 2009 were \$542.75 and \$472.76 respectively. This steady, significant increase is paralleled by the steady increase in listener's incomes. The "Spending By Income" chart also shows that the high end of the income range spent significantly more this year than last year.

This spending data could also backup the claim that gaming is a recession-proof industry. While the US is technically out of the recession, unemployment is still high and the recovery isn't being broadly felt. Additionally, Gen Con attendance hit an all-time high this year corroborating the fact that gamers are still spending more money in a soft US economy.

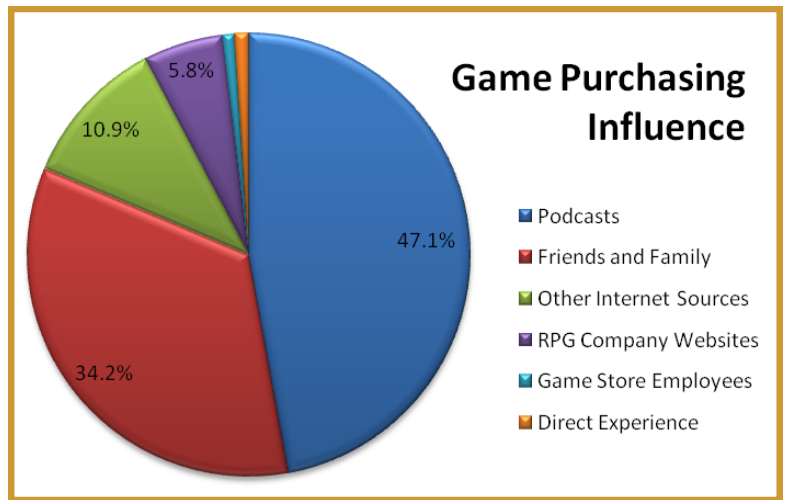


What Games Do They Play? (Cont)

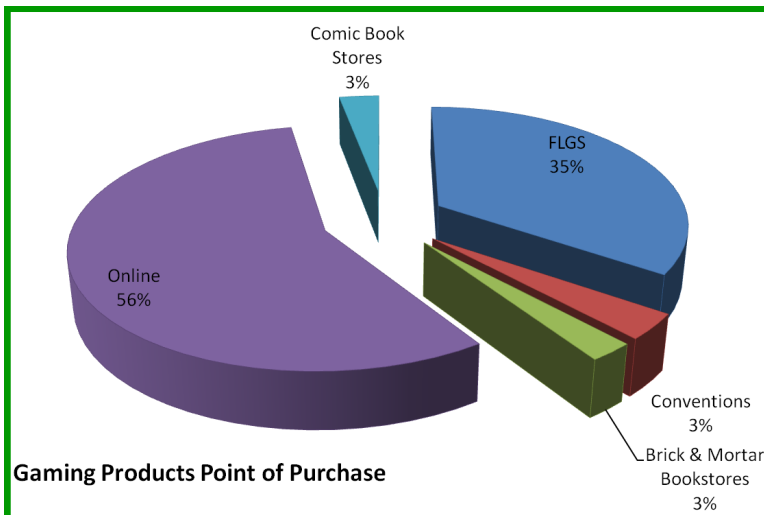


The chart to the left shows the average annual expenditures on tabletop games by preferred game system. This does not indicate how much the listeners spent on these particular games, but there are some interesting correlations. White Wolf adherents spent considerably less while in a year where their preferred system saw few new releases and GURPS enthusiasts spent almost double the previous year in the same year that the new addition of their preferred system was released. There was also a large increase in spending among those who prefer Indie/Story Games and this might be explained by the large number of games of this type that are currently available.

This year we asked listeners who had the greatest influence on their game purchasing decisions. The impact of RPG podcasts is very clear in this data as nearly half of the listeners credit podcasters with the greatest influence on their table-top game purchasing decision. Game store employees (aka *sales people*) had surprisingly little influence.



There was very little change in the "Gaming Points of Purchase" chart this year. Unsurprisingly, tech-savvy podcast listeners still prefer to buy table-top games online.



Germany	\$928.57
Canada	\$538.04
United Kingdom	\$523.21
Australia	\$511.05
Sweden	\$452.78

This table above shows average spending by country (the US average was nearly identical to the overall average). This chart does not factor in exchange rates as the listeners from these countries were asked to report their annual spending in US dollars. Furthermore, the sample sizes for most of these countries was low. This table is presented for the sake of curiosity and not as meaningful data.

What Shows Do They Listen To?

The table to the right lists the top 20 podcasts by percentage of respondents who listen to them. The survey reached a wider variety of listeners this year and most of the percentages for these shows when down slightly as a result even when the position of the show on the list remained the same. Listeners were asked to select *all* the shows they listen to from the list of all podcasts listed on RPGPodcasts.com.

While it would be of no benefit to compare the percentages to last year, we do show the position change of each show from their position on the overall list last year. Where a show in the Top 20 was added to the RPGPodcasts.com list since last year you will see “New!” in the Position Change column. “NerdBound Podcast” had the biggest positive position change from outside the Top 20—jumping up 30 spots to #19. “The Walking Eye” had the biggest move inside the Top 20 jumping up to #4.

In addition to the percentages of listeners, the table also shows the average annual spending on games and the average number of podcasts subscriptions for the listeners of each show. Keep in mind that there is a lot of overlap between groups as most listeners selected many shows – i.e. none of these data sets is unique.

The Top 20 Podcasts

Show	Repondents Who Listen	Position Change	\$/Year	Average # of Podcasts
Fear the Boot	39.4%	0	\$583.36	6.0
The Podge Cast	30.2%	0	\$567.64	6.5
Happy Jacks RPG Podcast	27.3%	+4	\$580.09	5.3
The Walking Eye Podcast	21.9%	+10	\$629.03	7.3
Role Playing Public Radio	21.0%	-1	\$555.94	6.8
Brilliant Gameologists	20.5%	0	\$687.27	7.4
Atomic Array	18.6%	+1	\$701.41	7.5
Jennisodes	18.2%	New!	\$672.32	7.8
All Games Considered	15.7%	-6	\$743.25	8.5
The Bear Swarm! Podcast	15.5%	-5	\$611.08	8.6
Actual People, Actual Play	15.2%	+6	\$582.75	8.1
Postcards from the Dungeon	13.4%	New!	\$634.79	8.0
The Game's the Thing	13.1%	+5	\$839.00	7.3
2d6 Feet in a Random Direction	12.8%	-3	\$719.78	7.9
Narrative Control	12.4%	-3	\$526.48	8.3
Kicked in the Dicebags!	11.9%	0	\$494.26	7.9
Canon Puncture	11.1%	-2	\$568.16	8.9
This Just In...From Gen Con!	11.1%	New!	\$901.69	8.6
NerdBound Podcast	10.9%	+30	\$395.49	5.8
The Jank Cast	10.4%	+7	\$650.75	9.5

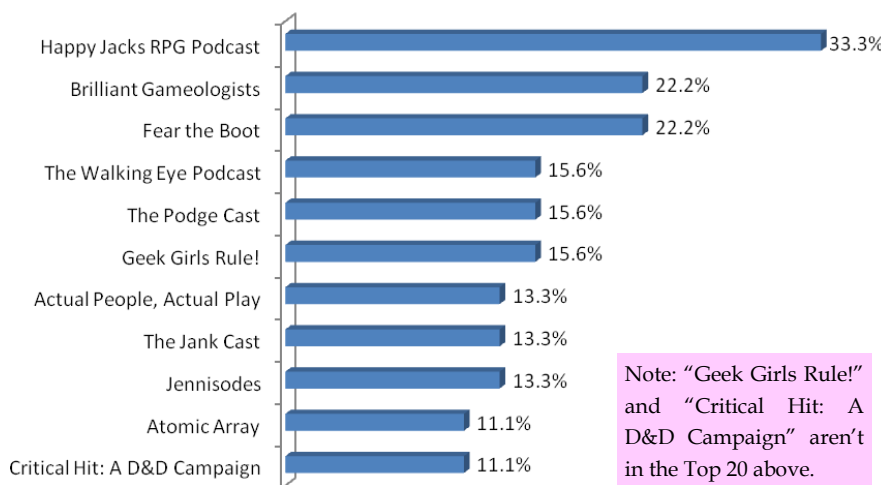
Highlighted in green are the top scores for annual spending on games and podcast subscriptions. The lowest scores for each are in yellow. It's not too surprising that listeners of “This Just In...From Gen Con!” spend far more than the average listener—their show is focused on new products debuting at Gen Con.

Apparently “NerdBound Podcast” listeners are the most thrifty. For the second year in a row, Happy Jack’s listeners subscribe to the fewest podcasts (of the Top 20 podcast).

Once again, listeners of all Top 20 shows listen to more podcasts than the average listener (4.2). It would seem that the more popular shows are good for all shows.

To the left you can see the favorite podcasts among female listeners. Happy Jacks is by far the most popular show among women this year despite not being on the Women’s list last year.

Women's Favorite Shows 2011



Note: “Geek Girls Rule!” and “Critical Hit: A D&D Campaign” aren't in the Top 20 above.

World Map of Listener Data



The map above represents 714 respondents that completed the location data fields of the survey and listed a "Preferred Gaming System". The colors indicate how much each of these listeners spends on games each year (see Map Key). I used Google Fusion Tables to map the data and you can explore the map in detail here:

<http://www.google.com/fusiontables/DataSource?snapid=S245503E3oK>

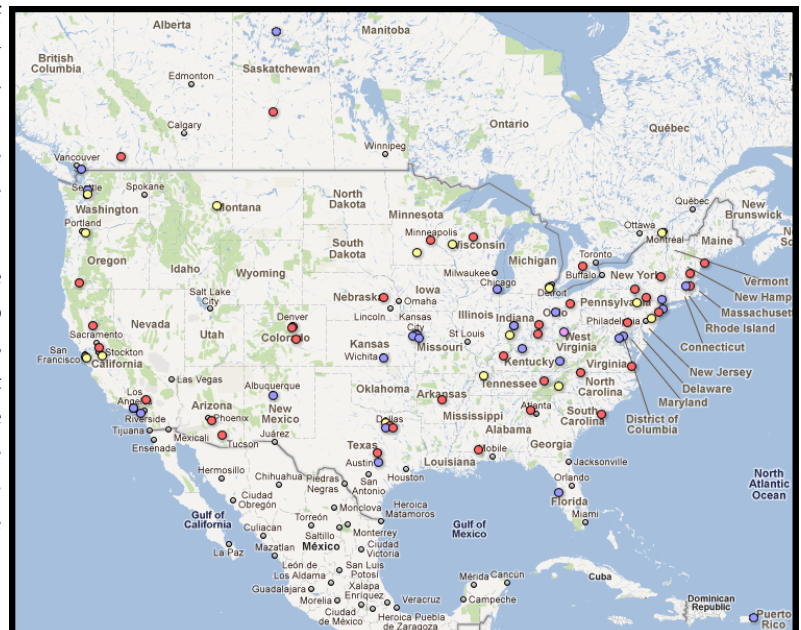
Also included in each point (listener) on the map is their preferred gaming system, number of podcast subscriptions, and who has the greatest influence on their game purchasing decisions. On the web page, you can Select any point on the map to view these details. You can also filter the map data: select "View" then "Filter", select the field you want to examine (e.g. Preferred Gaming System), select the filter parameter (e.g. Contains), enter the data you want to display (e.g. Pathfinder), and finally press "Apply". The map below shows all of the mapped respondents that listed "Pathfinder" as their preferred gaming system.

Map Key	
Spend on gaming per year	
●	< \$500
○	< \$1000
●	< \$5000
○	> \$5000

You can filter further by selecting "Add condition" and filtering by a second parameter such as "Influence" or "# of Podcast Subscriptions". This could have many applications, such as determining where concentrations of support are for major game systems, where the most spending is occurring, and where different sources of purchasing influence are strongest.

Pathfinder in North America

Another way to explore this data is on Google Earth. You must have the [software installed](#) to view the link below. The Google Earth view is more dynamic and contains the same data but does not include the filtering capabilities of the Google Fusion Tables. The other advantage of the Google Earth view is that all of the points are visible (Google Fusion Tables overlays multiple points that are in the same location).



Google Earth Map File:

http://spookyouthouse.com/files/survey/RPG_Podcast_Listener_Survey_2011_for_Google_Earth.kmz