

HELLO
WE'RE
HOOK.

Consumer Insight, Brand Strategy, & Content Development



WHAT CAN BRANDS LEARN FROM PODCASTS IN 2018?



WHAT IS SOCIAL INTELLIGENCE?

SHEDDING LIGHT ON UK PODCAST AUDIENCES & THEIR NEEDS

Combining Powerful AI...


In tandem with our data partner, Signify, we analysed over **1.5 million posts** from social media users in the UK to understand how they are talking about podcasts, cataloguing the different ways that users described key pods online and extracting key characteristics for individual shows and the medium as a whole.

...with the Nuance of Qualitative Research

Following our digital deep-dive, we took these findings into development workshops - speaking with podcast fans and audio tastemakers around the country to learn how they were engaging with the medium, what their content needs were in this space, and their expectations around advertising and brand sponsorship.

WHAT MAKES A **GOOD** PODCAST?





“I’m finding these days that unless there’s something exceptional on TV I’d rather listen to a podcast. It engages my brain more than TV – it’s less passive.”



ENGAGEMENT

PODCASTS ARE A HIGH ENGAGEMENT MEDIUM



Content offers a less engaged experience –
relaxed, chilled out, me-time

Content offers a more highly engaged experience –
thoughtful, critical, opinionated

MOBILE, STORAGE-FRIENDLY AND ON-DEMAND

PODCASTS ENABLE HIGH ENGAGEMENT AT TIMES WHEN
OTHER MEDIA CANNOT



Commuter Content



Escaping Drudgery



Eye-Fatigue Free



Active Lifestyles

ALONE TIME

LISTENING TO PODS IS A HIGHLY INDIVIDUAL EXPERIENCE

- Listeners' tastes in niche subjects might not be shared by others.
- On-going stories require sequential listening.
- There are few opportunities for shared listening.





SMART SPEAKERS

SPEAKERS ARE USED... JUST NOT FOR PODCASTS

While smart speakers may improve the solo listening experience in certain situations – e.g. in the kitchen, in bed, in the shower – they are not fundamentally changing the way audiences are consuming podcasts (at least not in their current form...)

- **The Smart Speaker owners we spoke to aren't using them to discover new podcasts.**
- **They are currently getting the functionality they desire from cheaper Bluetooth speakers.**
- **There is a slight distrust of the always-listening technology (stronger among techy respondents).**
- **Respondents are more excited by the ways smart speakers will let them play and discover music, not podcasts.**

SHAKING IT UP A BIT

CASE STUDY: CHOMPERS

Kids “podcasts” offer an exciting new model for how smart speakers can power up listening:

Audio products designed specifically for smart speakers – such as Gimlet’s new Chompers, an interactive ‘podcast’/Alexa Skill designed to encourage kids to brush their teeth – may start to push the format to its limit, blurring the boundaries between traditional podcasts and an entirely new type of audio product.



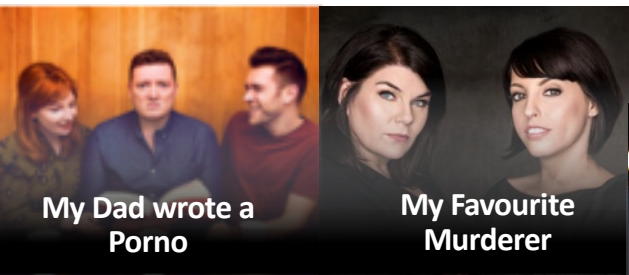
A FULL BLOWN REVOLUTION?

GOOGLE PODCASTS: SEARCH, DISCOVERY, SERENDIPITY



PODCAST CONTENT

TOP PODS SURPRISE – PROFILING NICHE SUBJECTS WITH
DEPTH AND DEFTNESS



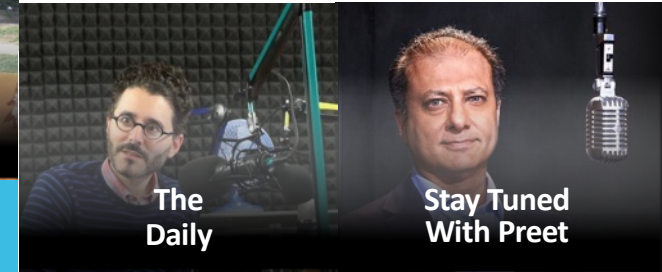
Willingness to explore alternative,
edgy topics



Not afraid to have an
opinion and share it



Space to deep-dive into often
obscure topics



Responsive to quickly
changing events

HUMAN-CENTRIC PODCASTS

NICHE SUBJECTS BECOME
COMPELLING NARRATIVES
THROUGH PERSONAL, HUMAN
STORYTELLING

Podcasts are a distinctly human-centric medium.

Even podcasts that deal with nominally non-human stories (e.g. Bitcoin, the judicial system, Brexit) **work best when they provide a human context**. Jon Ronson's exploration of the very human impact of online pornography in *The Butterfly Effect* is a great example of this.



A HUMAN STORY IN A SHIT TOWN

CASE STUDY: S-TOWN

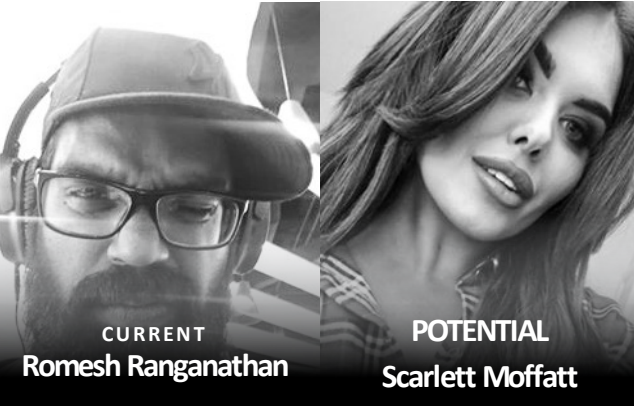
S-Town is considered the superlative example of human storytelling from the last 6 months

The pod combined many of the characteristics that listeners look for in their favourite podcasts all wrapped up in a **surprising, human-centric story**.



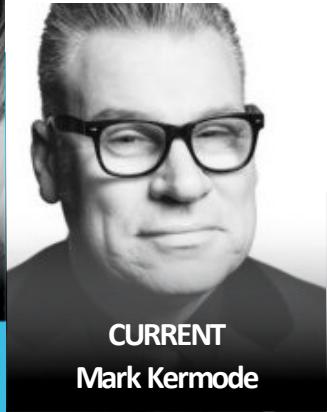
THE PODCAST HOST

THE SUCCESS OF A PODCAST IS INEXTRICABLY TIED TO ITS HOST(S).
ACROSS THE BOARD, THE BEST PODCAST HOSTS ARE EXPECTED TO HAVE:



CURRENT
Romesh Ranganathan

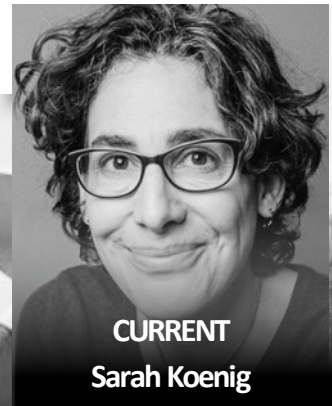
POTENTIAL
Scarlett Moffatt



CURRENT
Mark Kermode



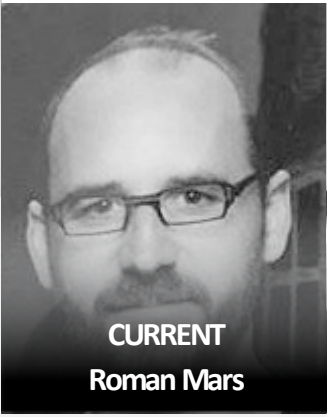
POTENTIAL
Elon Musk



CURRENT
Sarah Koenig



POTENTIAL
Stacey Dooley



CURRENT
Roman Mars



POTENTIAL
Phillip Schofield

A likeable, grounded attitude

An expertise in their field

The ability to tell a great story

A palatable voice

INTIMACY MACHINES

GREAT HOSTS MAKE PODCASTS AN INTIMATE CONVERSATION
BETWEEN THEMSELVES AND THE LISTENER.

“ It’s like having a range of smart friends who
follow you around and speak about
interesting things just to you. ”



TOP NOTCH BANTER

MEANINGFUL BANTER IS A SPECIALITY OF PODCASTS
AND REINFORCES THE INTIMACY OF THE MEDIUM.

...But podcast makers need to tread a fine line

Podcasts are high engagement media, and audiences' desire for banter needs to be viewed through this lens. Listeners want banter not waffle.

BANTER CREATES TRUST

CASE STUDY: 3 SHOTS OF TEQUILA

Banter reinforces the idea that listeners are participating in a conversation among trusted friends (instead of a faceless brand).

It also reflects the types of conversations audiences see in their own friend groups (particularly younger listeners) and makes podcasts feel more relatable.

The natural chat of the hosts of 3 Shots of Tequila was cited as a podcast that gets this right.



EXPANDING THE POD-VERSE

FAVOURITE PODCASTS HAVE POTENTIAL
TO CROSS PLATFORM...

- Fans are excited by new ways to consume loved content
- Human-centric, surprising stories could make the jump
- Big brand partners are expected to produce quality content



CROSS-PLATFORM CONCERNS

LISTENERS ARE WORRIED THAT SOME KEY ELEMENTS OF LOVED SHOWS (AND PODCASTS IN GENERAL) WILL NOT TRANSLATE WELL CROSS-PLATFORM.



Loss of Depth



Mainstream Sensibility



Backlog Anxiety



HOW CAN BRANDS MORE EFFECTIVELY USE PODCASTS?



“

If [podcasters] come across as genuinely interested and a fan of the product then it can be quite powerful. I think this is probably more powerful than more formal ads.

”

WHAT DO BRANDS GET FROM PODS?

DONE WELL, PODCAST AD CAMPAIGNS TAP INTO THE
HUMAN, TRUSTWORTHY NATURE OF THE MEDIUM

Listeners note a positive association with podcasts

Podcast fans think more fondly of brands that advertise on podcasts. It feels that brands are helping a relatively new medium grow. This brand lift is inversely proportional to the size of the brand: smaller brands gain more positive associations.

The trust associated with podcasters can transfer to the products they endorse

The trust that listeners place in their favourite podcasts and hosts can be transferred to the products advertised on their programme. Host-read ads are thought to have a tinge of personal recommendation over professional endorsement.

Human issues and complementary talent/media have cut through

Podcast ads work particularly well when tied to human issues (eg matched donations for natural disasters, personal stories about workers in the brand's factory) or when profiling complementary media and personalities (eg new podcasts or books)



NOVEL ADVERTISING EXPERIENCES

PODCASTS OFFER A POWERFUL ALTERNATIVE TO TRADITIONAL ADVERTISING EXPERIENCES

Beating Ad-Blocker

We live in the age of the ad blocker... But ad-blockers don't work on podcast ads.

Tracking Free

Savvy tech users also recognize they aren't being tracked like with traditional ads – no cookies here!

Playing with the paradigm

From an irreverent chat about ad copy, to lovingly made 'docutisements' – pod ads feel different.

“

What's nice about Pod Save America is that they take the mick out of the advertising script sometimes which really gets your attention... if I was living in the US I'd probably have a few of the products they advertise

”

SKIPPING ADVERTS

AD SKIPPING IS RELATIVELY EASY – BUT IT DOES TAKE SOME WORK - CONSEQUENTLY MESSAGING IS GETTING THROUGH

Skipping is an imprecise art

Listeners are not fast enough with the skip and often hear the first few seconds of an ad.

They're otherwise occupied

Users' hands are full, or their phone is on the other side of the room (particularly prevalent among Bluetooth speaker users).

Strong ad copy

Even serial ad-skippers report that they sometimes get sucked in by well-crafted, entertaining ad copy.





AVOIDING OFF-KEY ADS

ADS CAN BUILD STRONG RELATIONSHIPS WITH LISTENERS,
BUT AN OFF KEY AD STANDS OUT. TO AVOID THIS:



Ads shouldn't be
tonally jarring



The quality of the ad should
match the quality of the pod



Ads need to remain
relevant and purpose-built

BRANDED PODCASTS

FOR MEDIA COMPANIES, BRANDED
PODCASTS ARE A WELCOME (AND,
FRANKLY, EXPECTED) EXTENSION

- Content and stories are media brands' stock and trade – podcasts are a compelling new way of telling stories.
- Big media brands come with a stamp of quality (in terms of production and storytelling).
- Listeners don't expect ulterior motives from media brands.



MEDIA BRAND OPPORTUNITY

CASE STUDY: DIRTY JOHN

Opportunities for media brands lie beyond pure content awareness:

- Fans of Dirty John were invited to sign up for the LA Times' 'Essential California' newsletter to learn when new podcasts became available.
- **21,000** subscribers signed up to the newsletter in the launch week (a 5x growth).
- **70%** remained subscribed to the newsletter after the podcast concluded, offering conversion opportunities





NON MEDIA COMPANIES

FOR NON-MEDIA COMPANIES, THERE IS MORE SCEPTICISM...

Younger respondents in particular, having been saturated in content marketing for most of their lives, are not immediately trusting of non-media branded podcasts:

- They find it hard to escape the feeling that anything created by brands is just another kind of content marketing.
- Faceless brands aren't thought of as natural partners for intimate, human media products.
- Big brands can feel out of place in the 'craft' world of podcasts.

SHIFTING PERSPECTIVES

PODCASTS CAN CHANGE PERCEPTIONS
ABOUT NON-MEDIA BRANDS

“I thought of Grindr as just a dating app - not as a lifestyle brand. So the podcast made me think of Grindr as a business that is trying to get the conversation going about gay sexual health and culture - which can only be a good thing.”



SUCCESSING WITH PODS

LISTENERS HAD SOME THOUGHTS ON HOW TO MAKE THE MOST OF PODS

To succeed, brand sponsorship needs to tap into the honesty and intimacy of the podcast format. This can be achieved by:

- Focusing on parts over the whole
- Getting comfortable with brand 'roughness'
- Expanding brand associations

FROM ALL OF THE TEAM AT HOOK

THANK YOU

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Signify for their help with this research.*

