

IT'S ALL IN THE MIND(SET)

A person with their back to the camera, wearing orange headphones, stands in a dark, mountainous landscape. They are looking through a large, transparent, multi-faceted geometric prism that frames a sunset scene with mountains and a blue sky. The overall color palette is dominated by blues, oranges, and greys.

How + why brands should action
against mindsets in podcasts

M/GNA **MEDIA TRIALS**

VOXMEDIA



2020

The Medium

VOX MEDIA examined the evolving role of podcasts in media

Podcasts offer unique content

74% of listeners say podcasts provide content they can't find elsewhere

Podcast listeners are purpose-driven

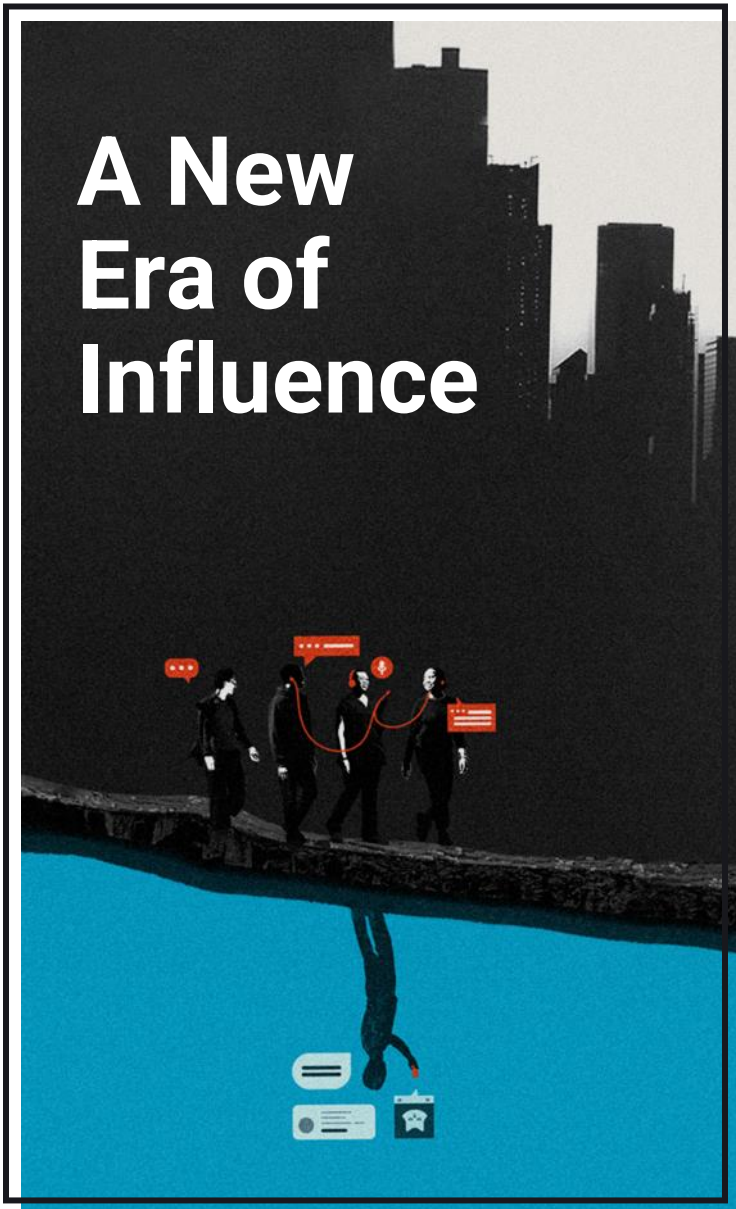
People turn to podcasts to learn new things, dive deeply into topics, and stay informed (top reasons for listening)

Listeners find satisfaction in niche topics

Unlike streaming video, which offers creativity and customization, podcasts uniquely provide niche content that feels like time well spent

Listeners feel a sense of meaning and learning

While social media connects people and allows for customization, podcasts stand out by delivering a sense of meaning and learning



2023

The Maker

We explored the role podcasters play in the lives of listeners

Podcasts are the main source of information for things most important

75% say podcasts serve as their primary source of information on topics in which they are most passionate

Podcasters are now more influential than social media personalities and celebrities

75% of listeners value podcasters' influence more than social media influencers (15%) and TV/movie celebrities (10%)

Listeners feel they are making smarter decisions because of podcasts

Podcasts have helped 77% make smarter decisions; listeners are turning to this format over social media when making decisions

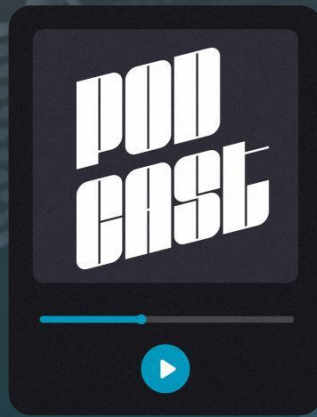
Podcasters' influence extends to purchase decisions

70% of Millennial listeners have been persuaded to purchase by a podcast ad

The World Of Podcasts Brings Unprecedented Nuance

FROM MEDIUM →

How it started - 2020



TO MAKER →

How it changed - 2023



NOW **SHIFTING TO MINDSET**

How it's looking - 2025



Mindset Shift

Marketers should go deeper than audiences alone and consider mindset

AUDIENCES

Describes who a person is in-the-moment

- ✓ Age
- ✓ Income
- ✓ Interests
- ✓ Life Stage
- ✓ Location

MINDSET

Describes a person's state of mind in-the-moment

- ✓ Why are they listening?
- ✓ How are they feeling?
- ✓ Is the podcast their daily ritual? Or something new?
- ✓ Where are they when they are listening?

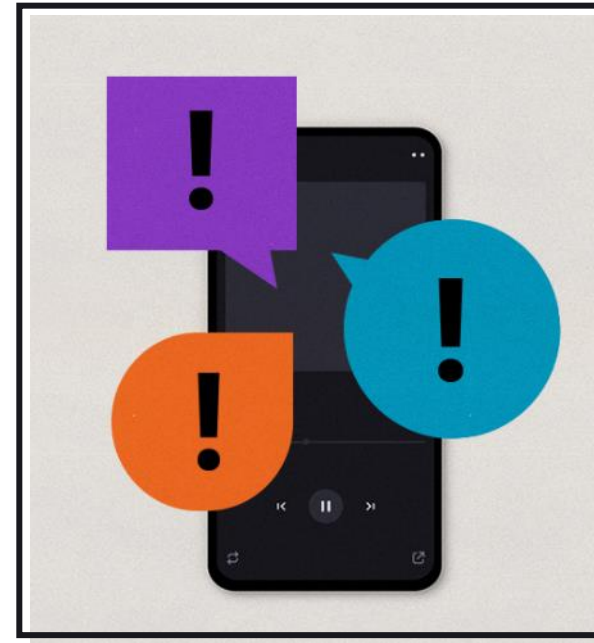


Our Mission



Mindset Detection

Identify and profile the most predominant podcast listener mindsets



Unlock Brand Opportunities

Pinpoint the best media planning strategies for aligning with each mindset

The Podcast Diaries

1

Recruitment

Podcast listeners recruited from a representative online panel

Representative recruitment across weekend and weekdays

Total n=2,003

2

Screeners

A18+, who have listened to a podcast in past 24 hours

3

Podcast Media Diary

Detailed diary of most recent podcast listening session (within past 24 hours)

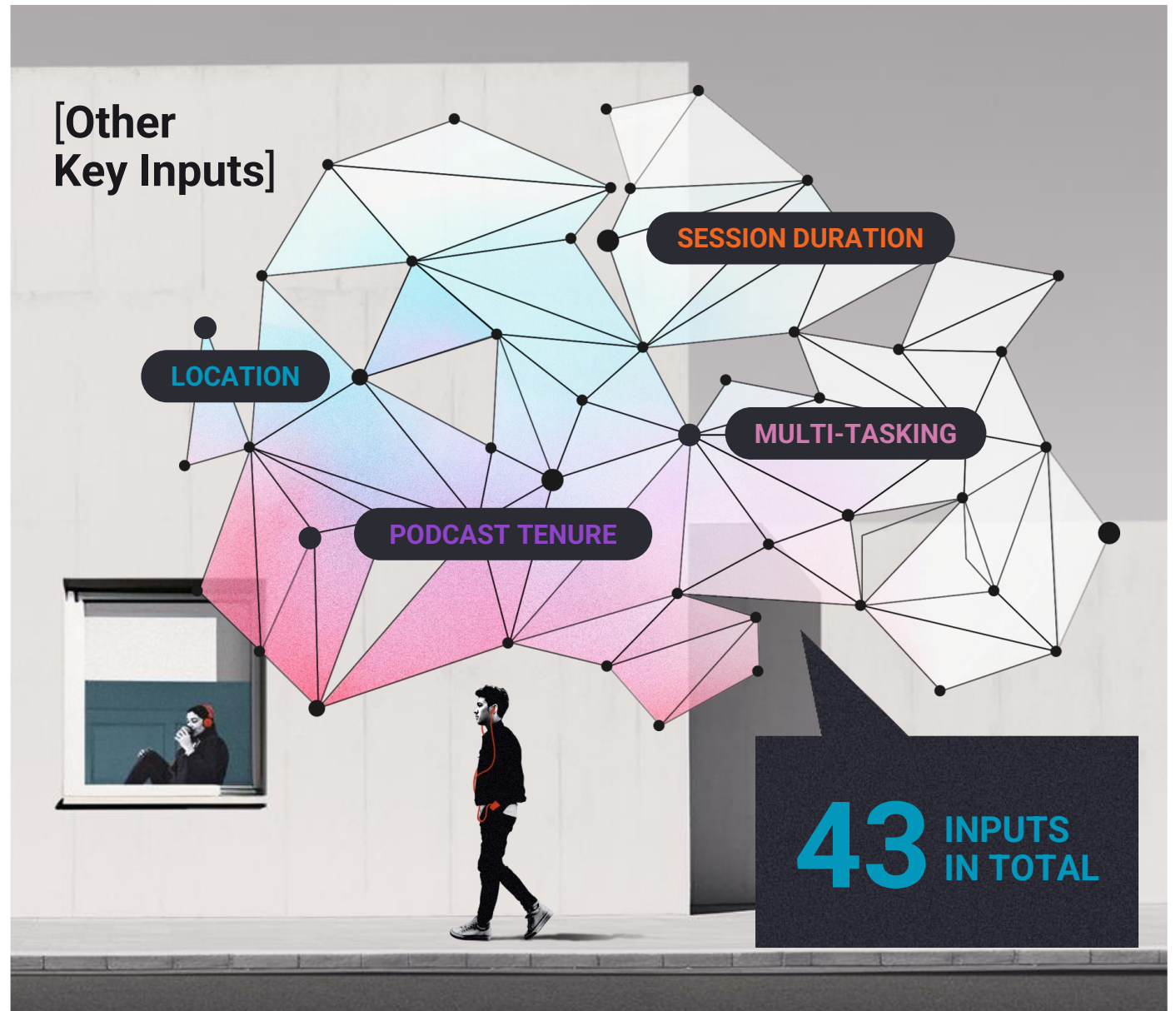
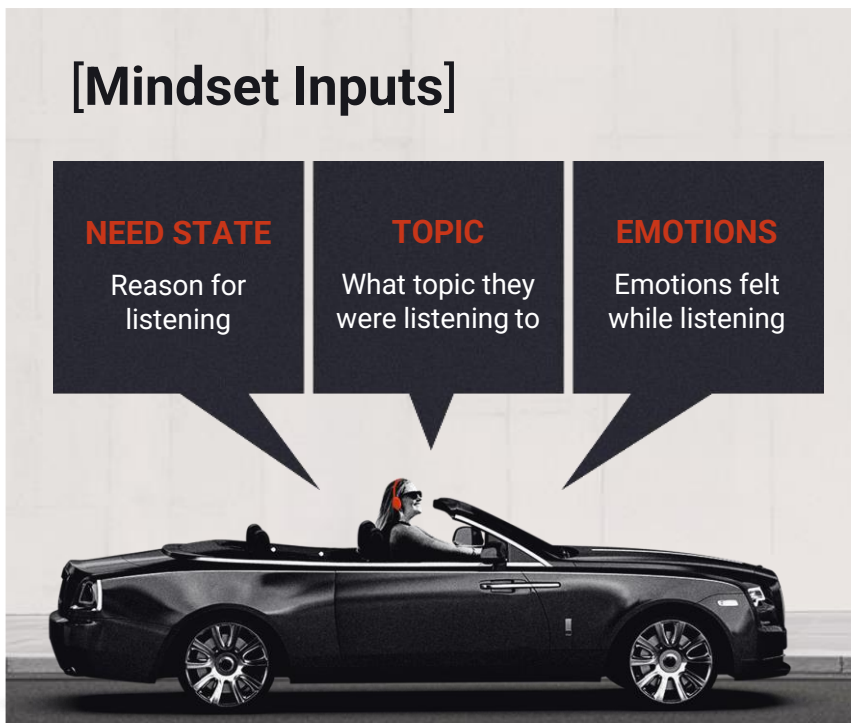
4

Ad Preference Deep Dive

Deep dive into ads heard in podcast session and ad preferences

The Analysis

Cluster analysis to identify the most predominant podcast listener mindsets

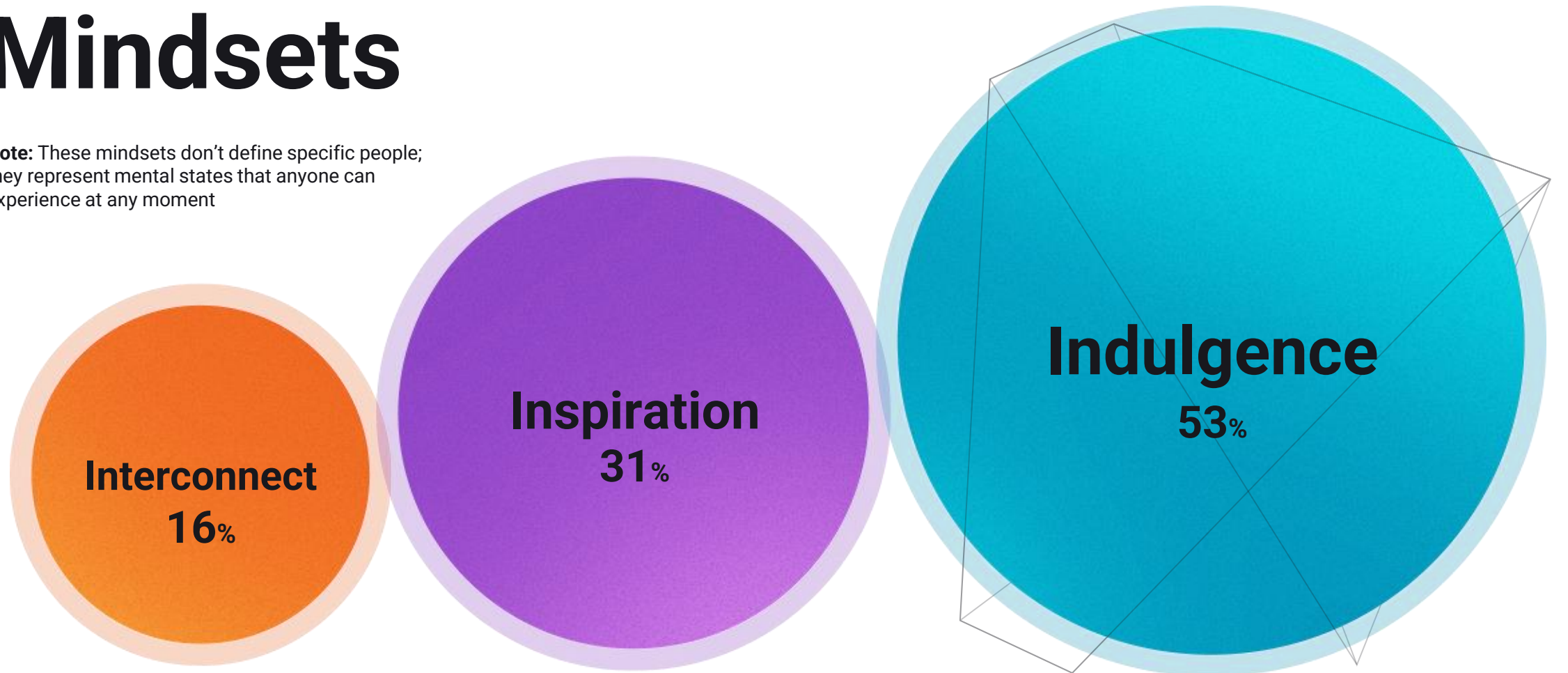




PODCAST MINDSETS, IDENTIFIED

3 Predominant Mindsets

Note: These mindsets don't define specific people; they represent mental states that anyone can experience at any moment

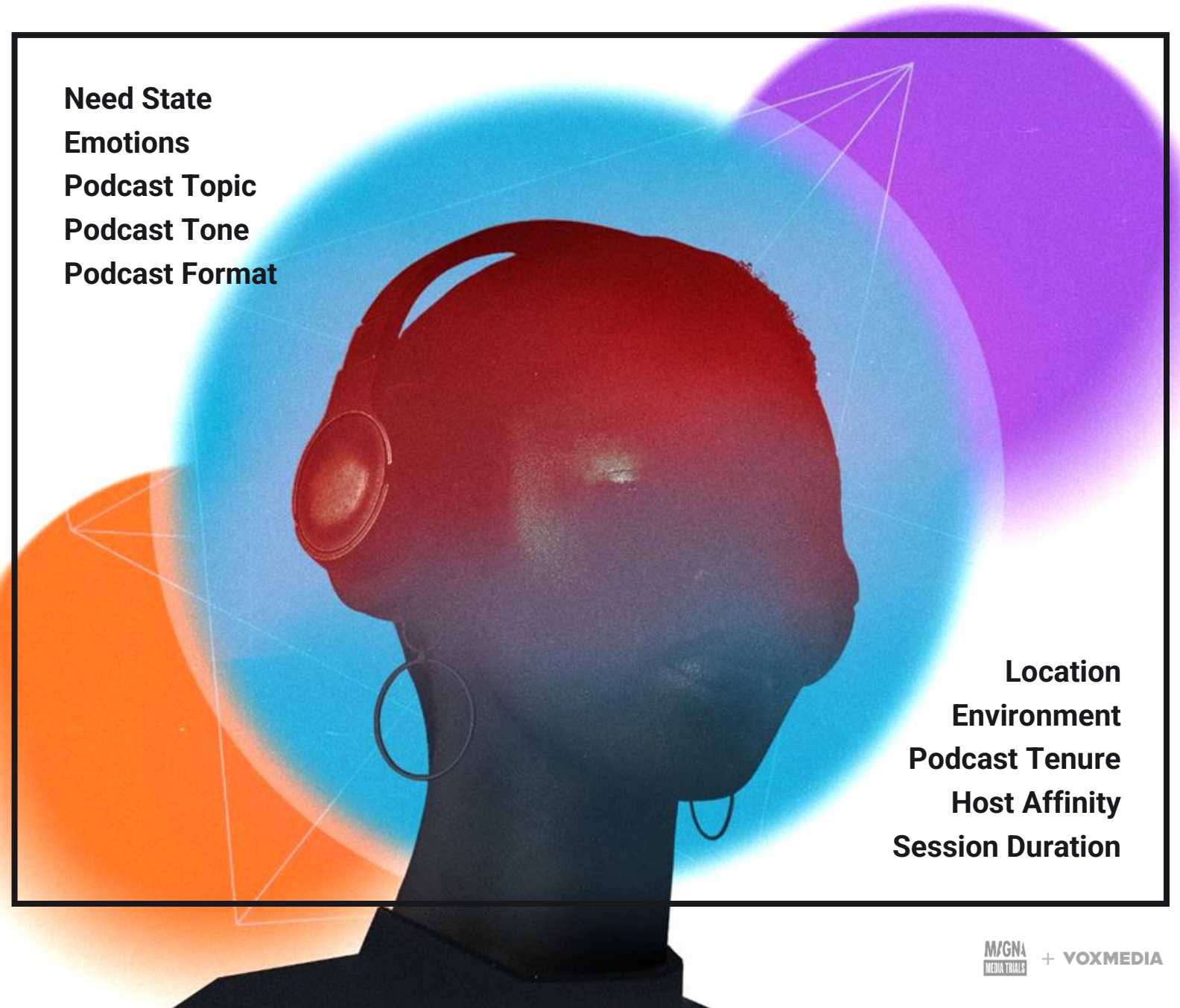


SMALLER AUDIENCE

LARGER AUDIENCE

For each mindset,

We will dive deep into...



THE

INTERCONNECT

MINDSET





THE INTERCONNECT MINDSET

A SNAPSHOT

PURPOSE

Connect with others and events of the world

EMOTIONAL RESPONSE

Surprised, thrilled, in-suspense, deeply touched, frustrated

OPENNESS

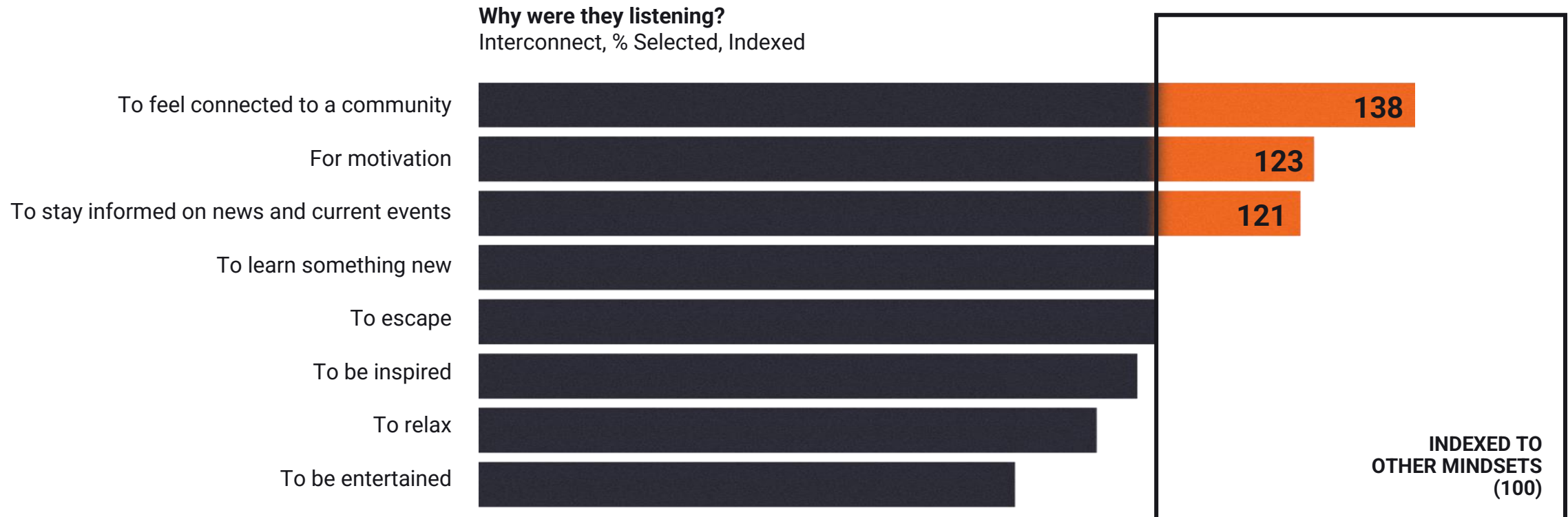
High receptivity to ads; willing to try new podcasts

PODCAST NEEDS

Trustworthy host; information & knowledge, storytelling

INTERCONNECT MINDSET

In this mindset, people listen to stay connected with others and keep up with the world



INTERCONNECT MINDSET

Listeners are in locales where they may be engaged in both mental and physical activities

Where are they listening? - Interconnect, % Selected, Indexed

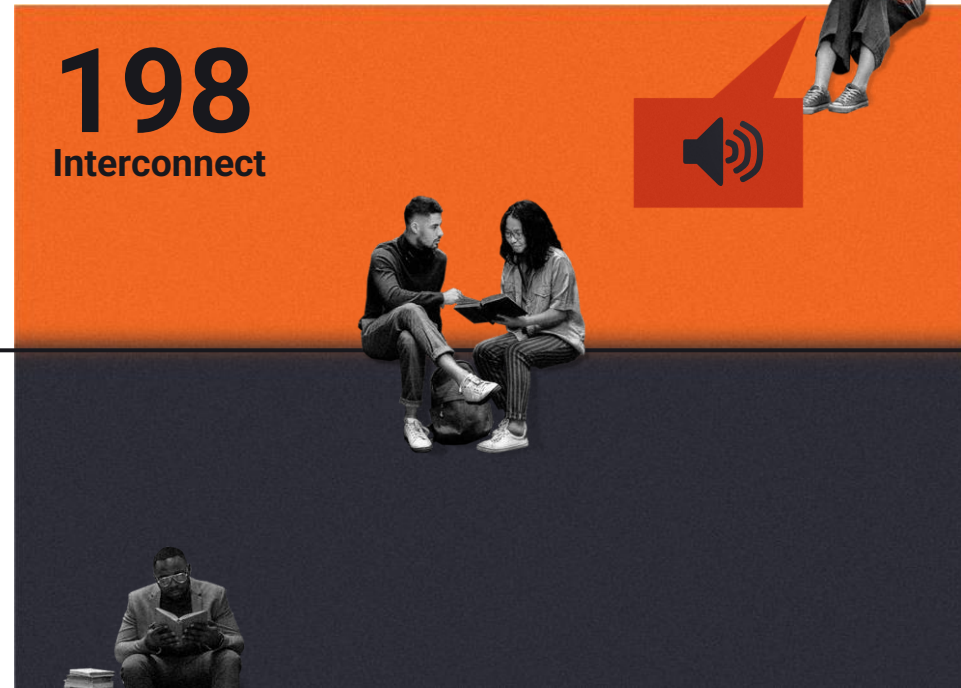


INTERCONNECT MINDSET

Listening environment is vibrant, but they persevere in both short spurts and long binges

What was the listening environment like?
Interconnect, % Selected, Indexed

["Active and busy"]



INDEXED
TO OTHER
MINDSETS
(100)

How long did they listen?
Interconnect, % Selected, Indexed

Longer than 2 hours



1 to 2 hours



30 mins to 1 hour



Less than 30 minutes



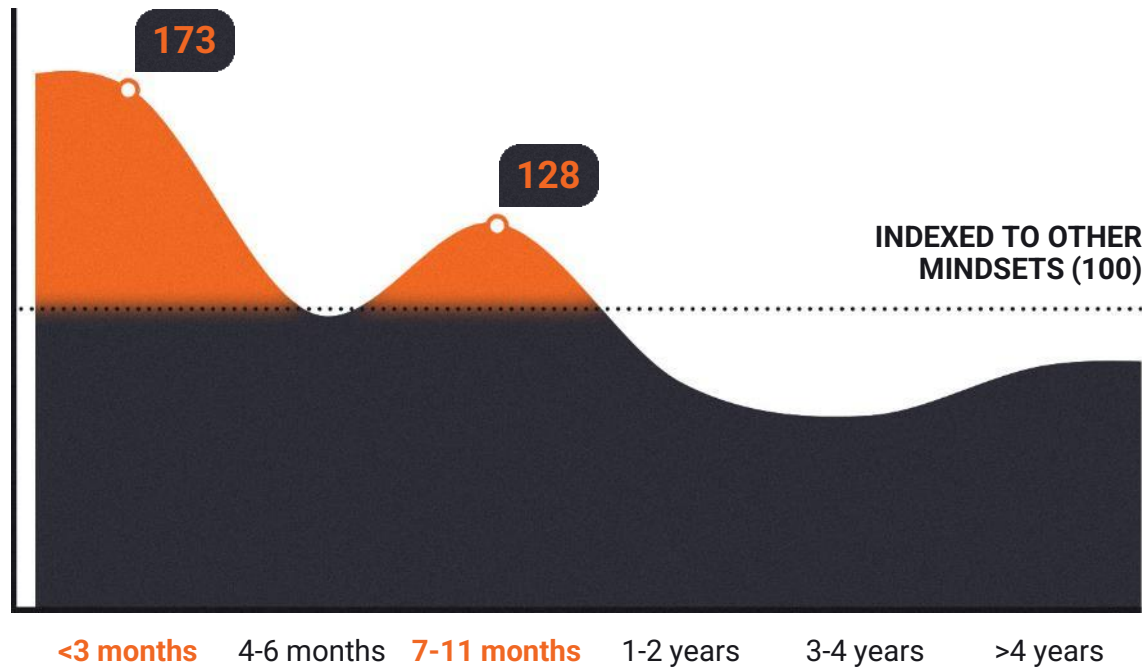
INDEXED TO
OTHER MINDSETS
(100)

Interconnect Mindset n=310
Q: How would you describe your listening environment?
Q: In total, how long did you listen?

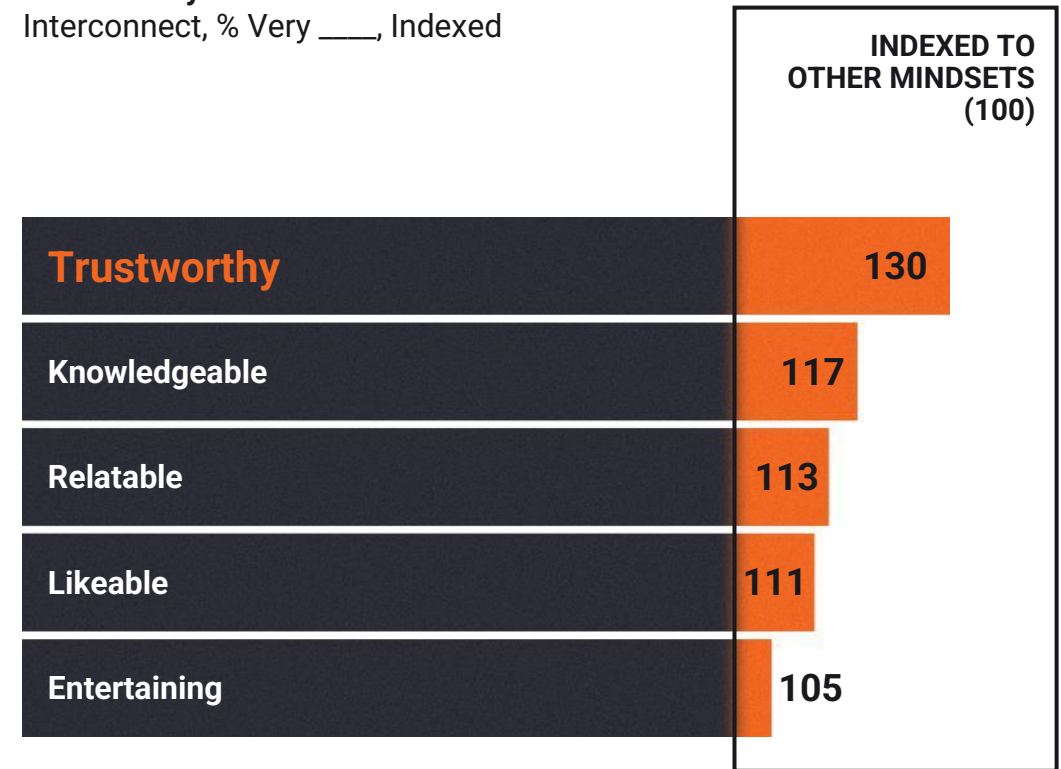
INTERCONNECT MINDSET

Shorter listening tenure suggests an openness to new podcasts – but the host must convey a sense of trust

How long have they listened to the podcast title?
Interconnect, % Selected, Indexed



How do they feel about the host?
Interconnect, % Very ____, Indexed

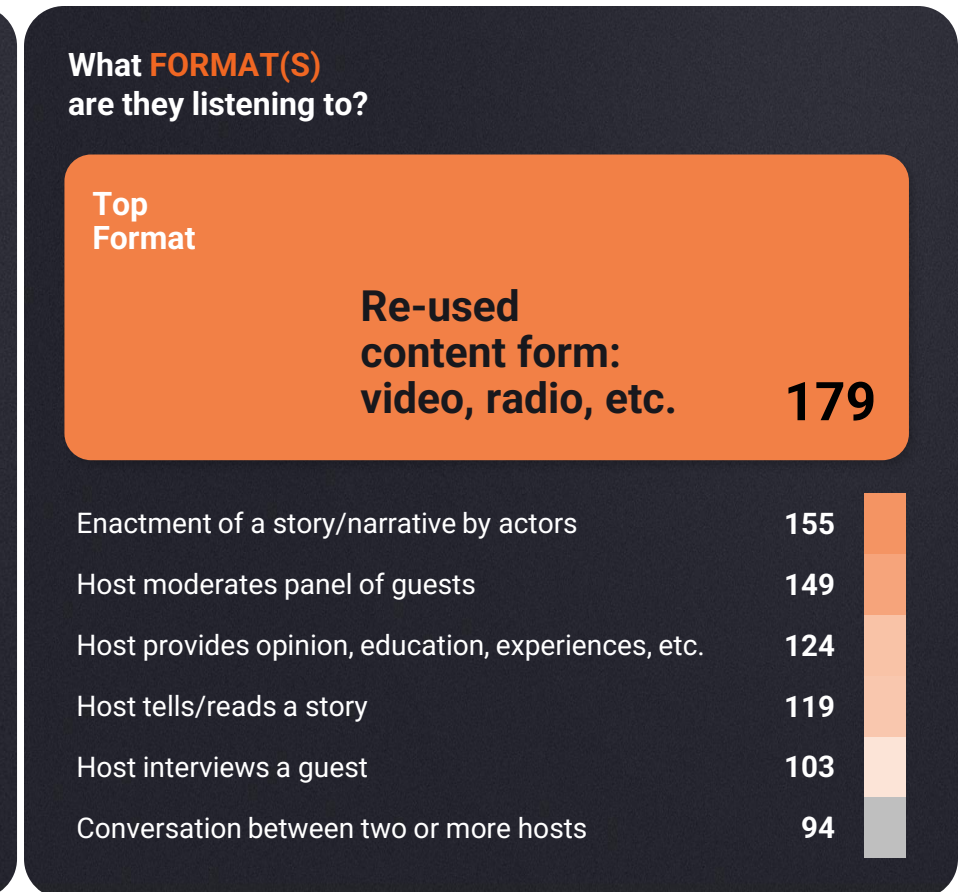
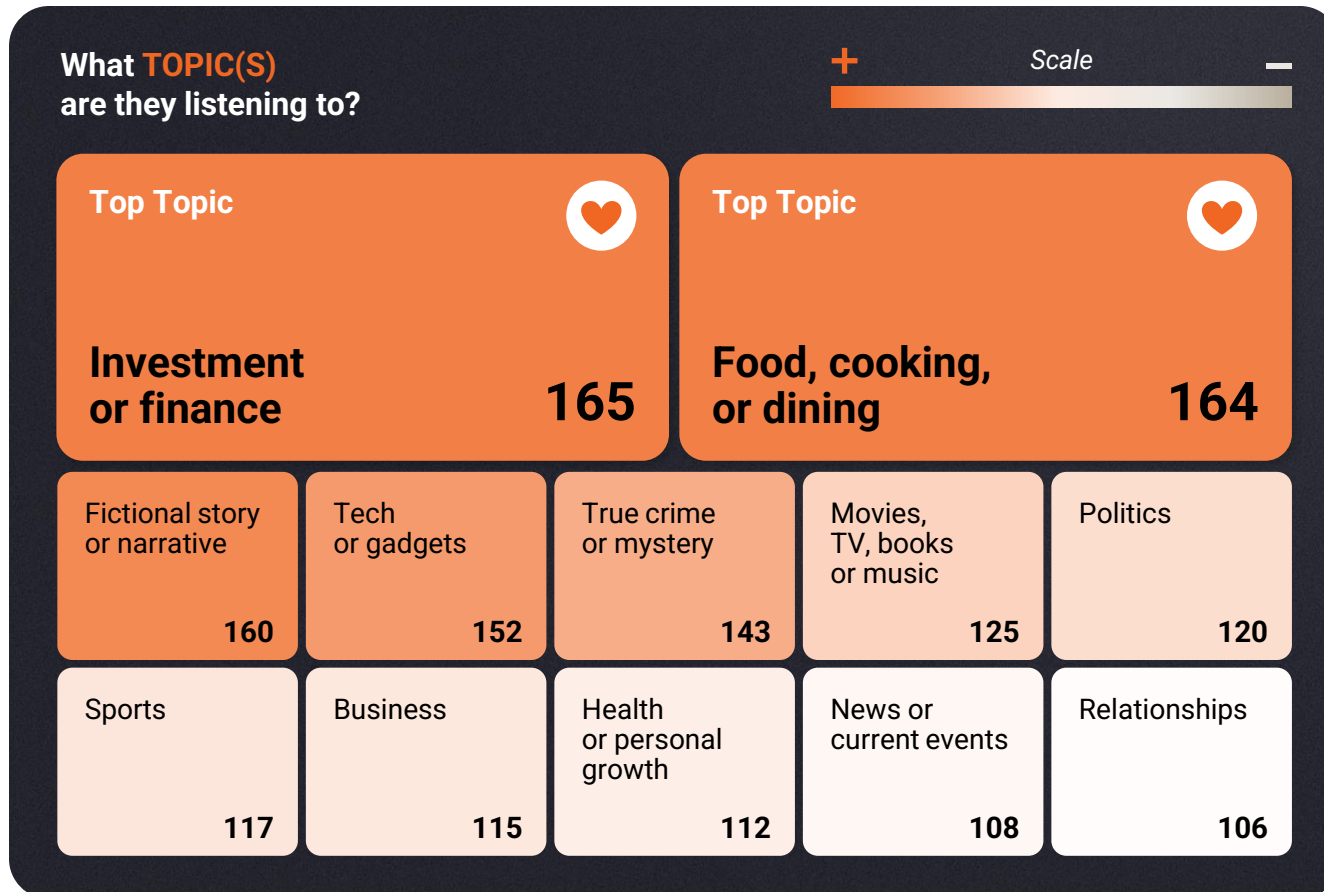


Interconnect Mindset n=310
Q: How long have you been listening to this podcast?
Q: How would you rank the podcast host on the following qualities?

INTERCONNECT MINDSET

Openness to new podcasts translates into receptivity for a wide range of topics and formats

Listeners over-index on all topics, likely contributing to the variety of strong emotions they feel



Interconnect Mindset n=310
 Q: What topic(s) were covered on the podcast?
 Q: Which of the following best describes the format of the podcast?

INTERCONNECT MINDSET

The power of connecting with others elicits strong emotions

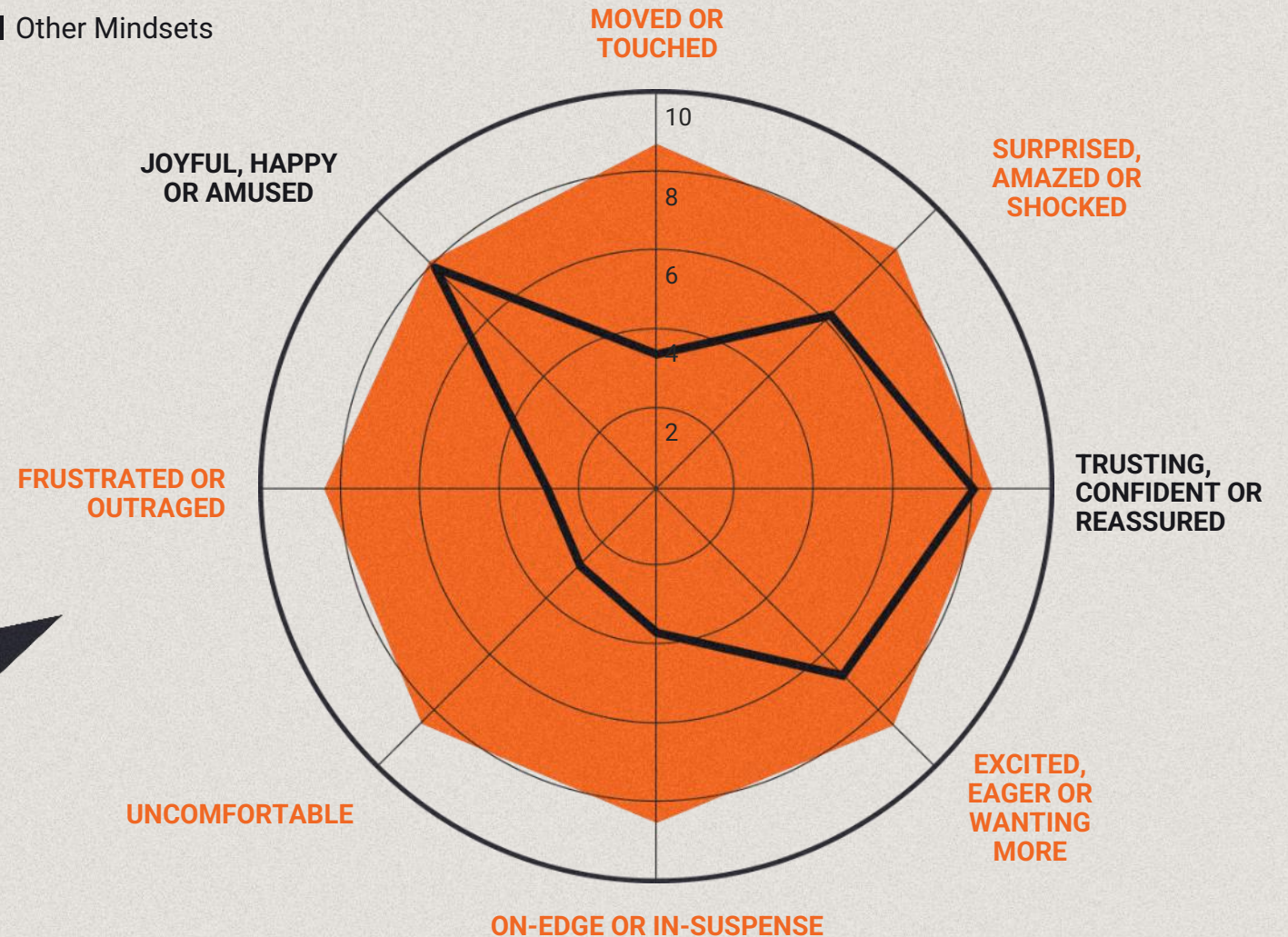
How are they feeling while listening?
Interconnect, Average Rating
(10=Very Much; 1=Not At All)

MORE OPEN TO ADS

Strong feelings translate into exceptionally high receptivity to ads; **71% are "very open"** vs. 51% for other mindsets

[Emotions while listening]

- Interconnect
- Other Mindsets



Interconnect Mindset n=310
Q: On a scale of 1 to 10, how much were you feeling the following emotions while listening to the podcast?

INTERCONNECT MINDSET

Leverage longer ads that focus on telling the brand's story; consider a promo code



What types of ads are preferred?

Over indexed preferences

Ad Format: Any Format

Type of Message: Tell a story

Include Discount: Yes

Ad length: Fewer, longer ads

What are they listening to?

Indexed to other mindsets (100)

Topics		Tones		Formats	
Food, cooking, or dining	165	Somber	256	Re-used content from video, radio, etc.	179
Investment or finance	164	Gritty	220	Enactment of story/narrative by actors	155
Fictional story or narrative	160	Tense	206	Host moderates panel of guests	149

Interconnect Mindset n=310

Q: What topic(s) were covered on the podcast?

Q: Which of the following best describes the format of the podcast?

Q: How would you describe the overall tone of the podcast?

Q: How would you describe the content of the ad(s) you heard during the podcast?

Q: How many ads would you prefer during your experience?

Q: What type of ad(s) would you have been open to hearing during your experience?

THE INSPIRATIONAL MINDSET





THE INSPIRATION MINDSET

A SNAPSHOT

PURPOSE

Get energized, motivated and up-to-date

EMOTIONAL RESPONSE

Eager for the unknown, in-suspense,
deeply moved, discomfort

OPENNESS

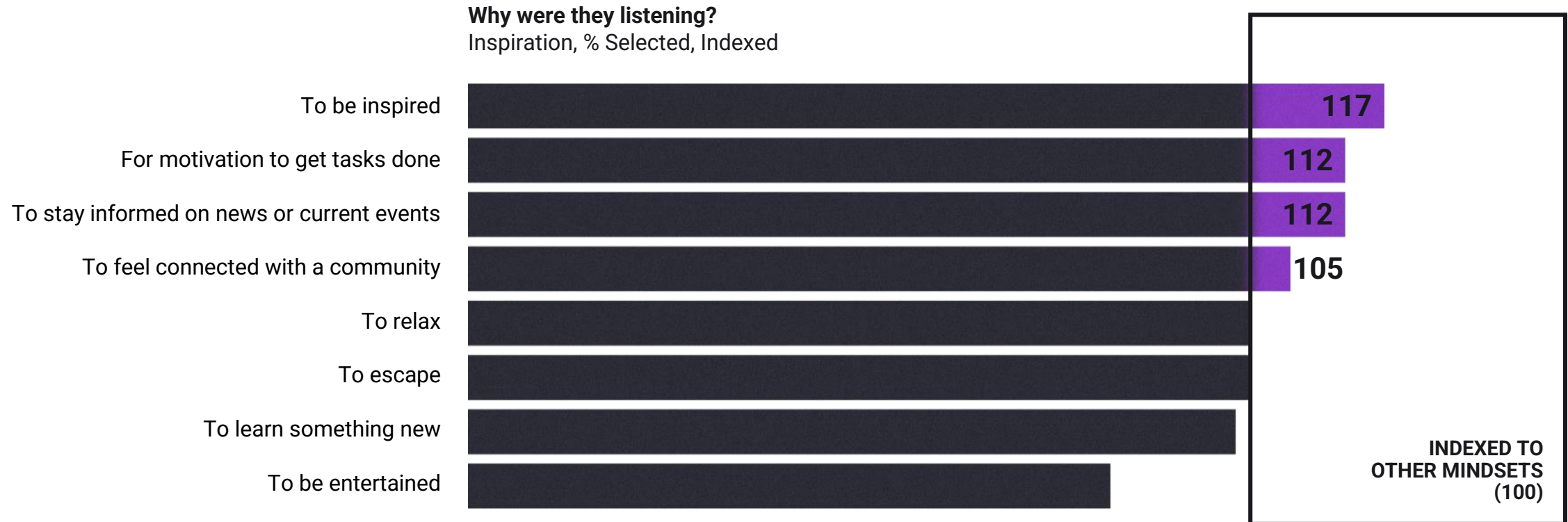
Short ads; open to trying new podcasts

PODCAST NEEDS

Compressed format, narratives &
storytelling

INSPIRATION MINDSET

Listeners are looking to be energized and motivated while staying up-to-date with current events



INSPIRATION MINDSET

Listeners tune in while out-and-about, perhaps seeking energy for less mentally demanding tasks such as commuting

Where are they listening? - Inspiration, % Selected, Indexed)



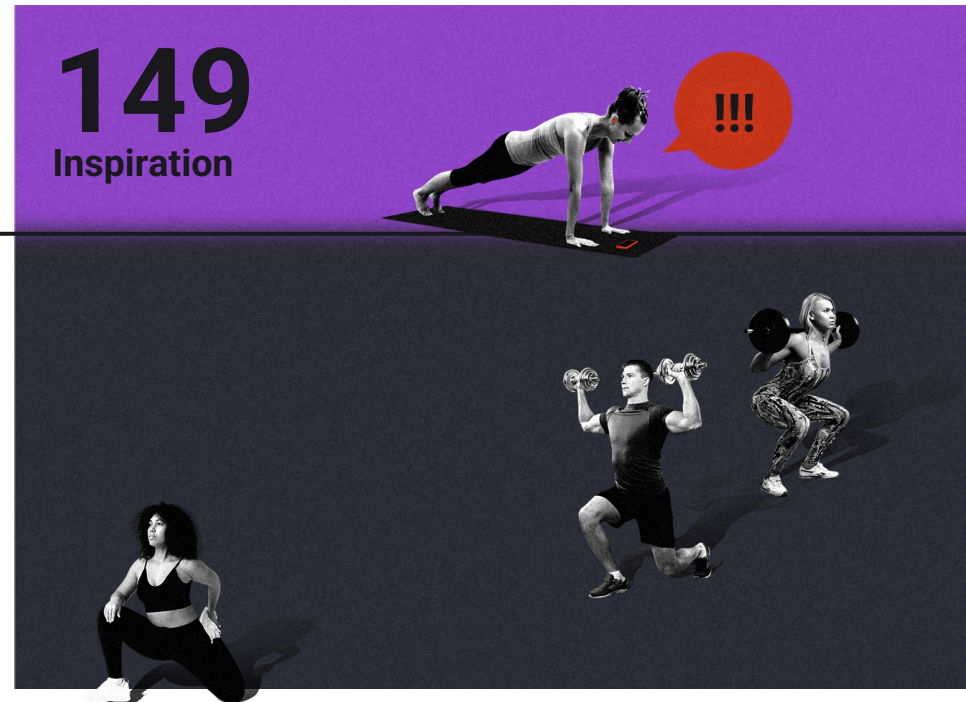
INSPIRATION MINDSET

Listening while out-and-about translates into a vibrant environment and short bursts of listening time

What was the listening environment like?

Inspiration, % Selected, Indexed

["Active and busy"]



149
Inspiration

INDEXED
TO OTHER
MINDSETS
(100)

How long did they listen?

Inspiration, % Selected, Indexed

Less than 30 minutes



30 mins to 1 hour



1 to 2 hours



Longer than 2 hours



INDEXED
TO OTHER
MINDSETS
(100)

Inspiration Mindset n=619

Q: How would you describe your listening environment?

Q: In total, how long did you listen?

INSPIRATION MINDSET

Shorter listening tenure suggests an openness to new podcasts

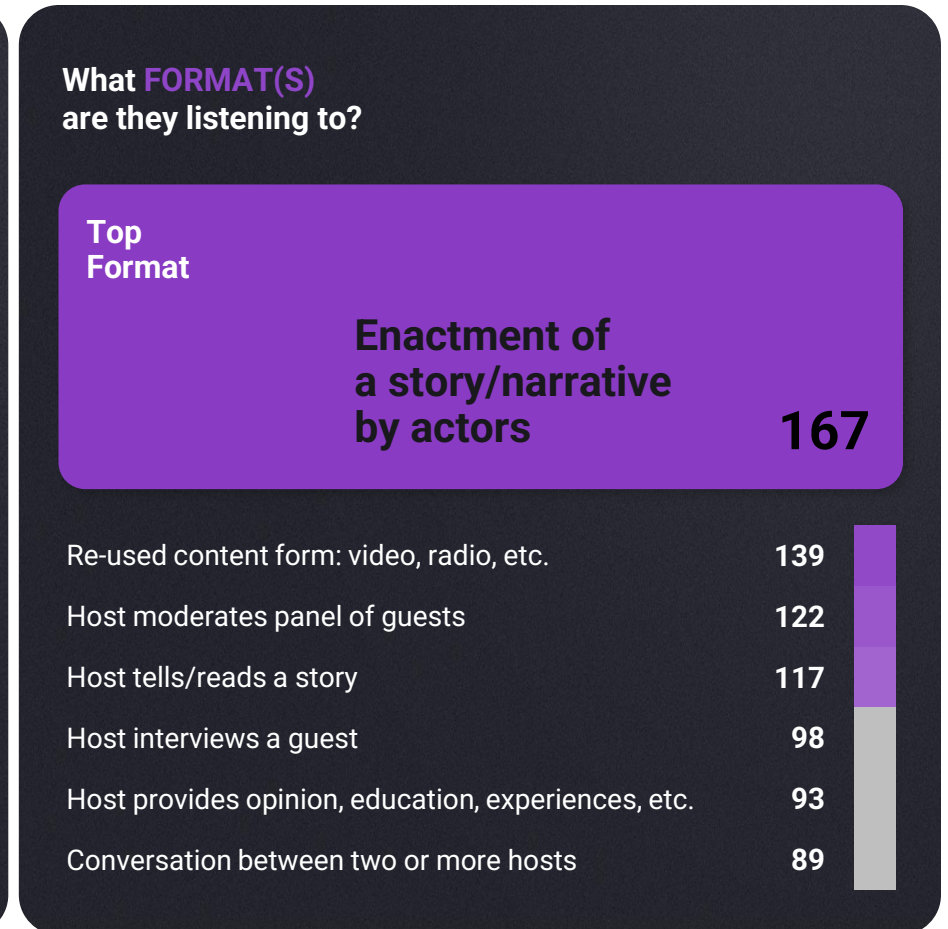
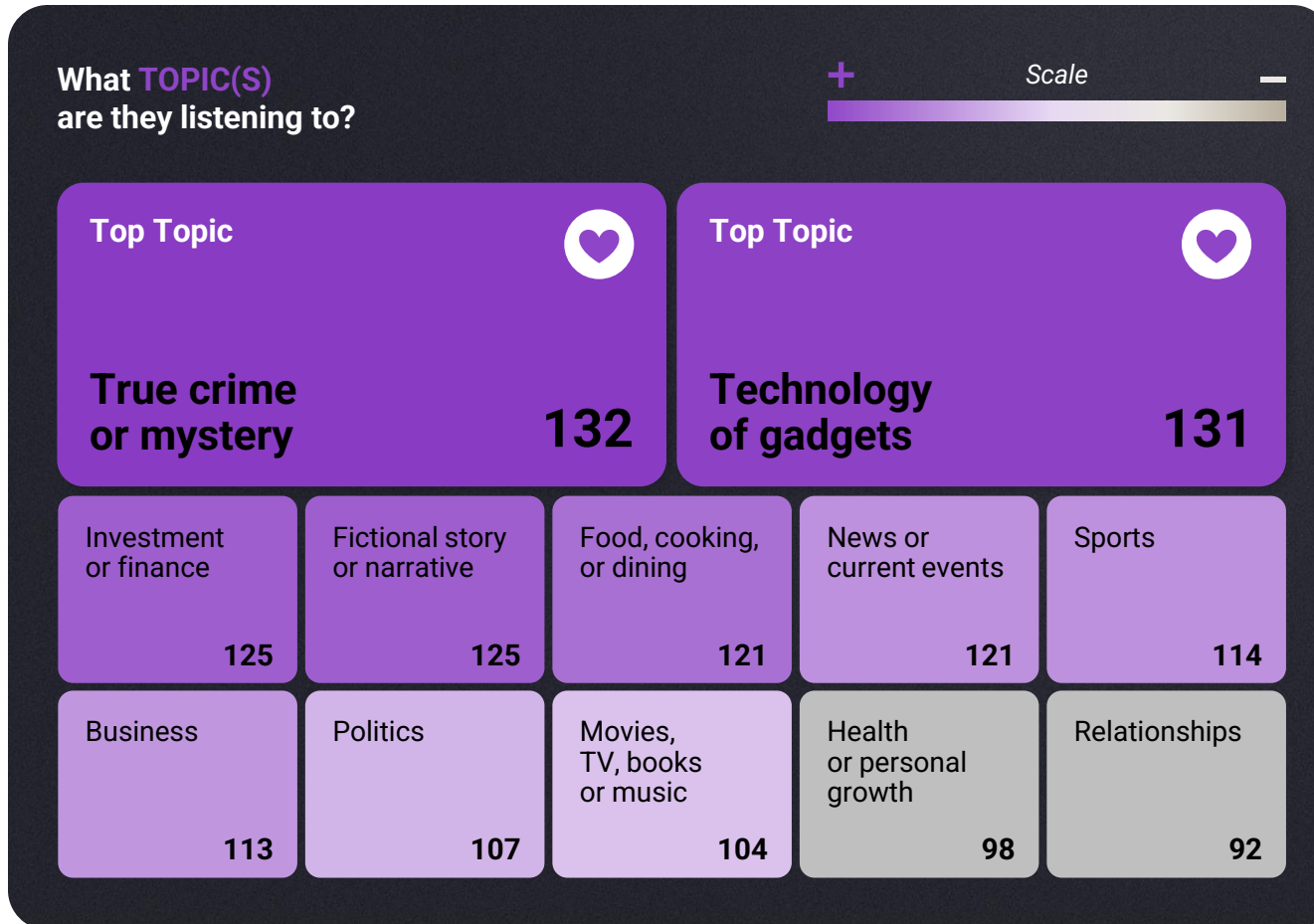
How long have they listened to the podcast title?

Inspiration, % Selected, Indexed



INSPIRATION MINDSET

Those seeking inspiration also rely on a wide range of topics



Inspiration Mindset n=619
 Q: What topic(s) were covered on the podcast?
 Q: Which of the following best describes the format of the podcast?

INSPIRATION MINDSET

Eagerness for the unknown and the suspense that comes with it drives the mindset

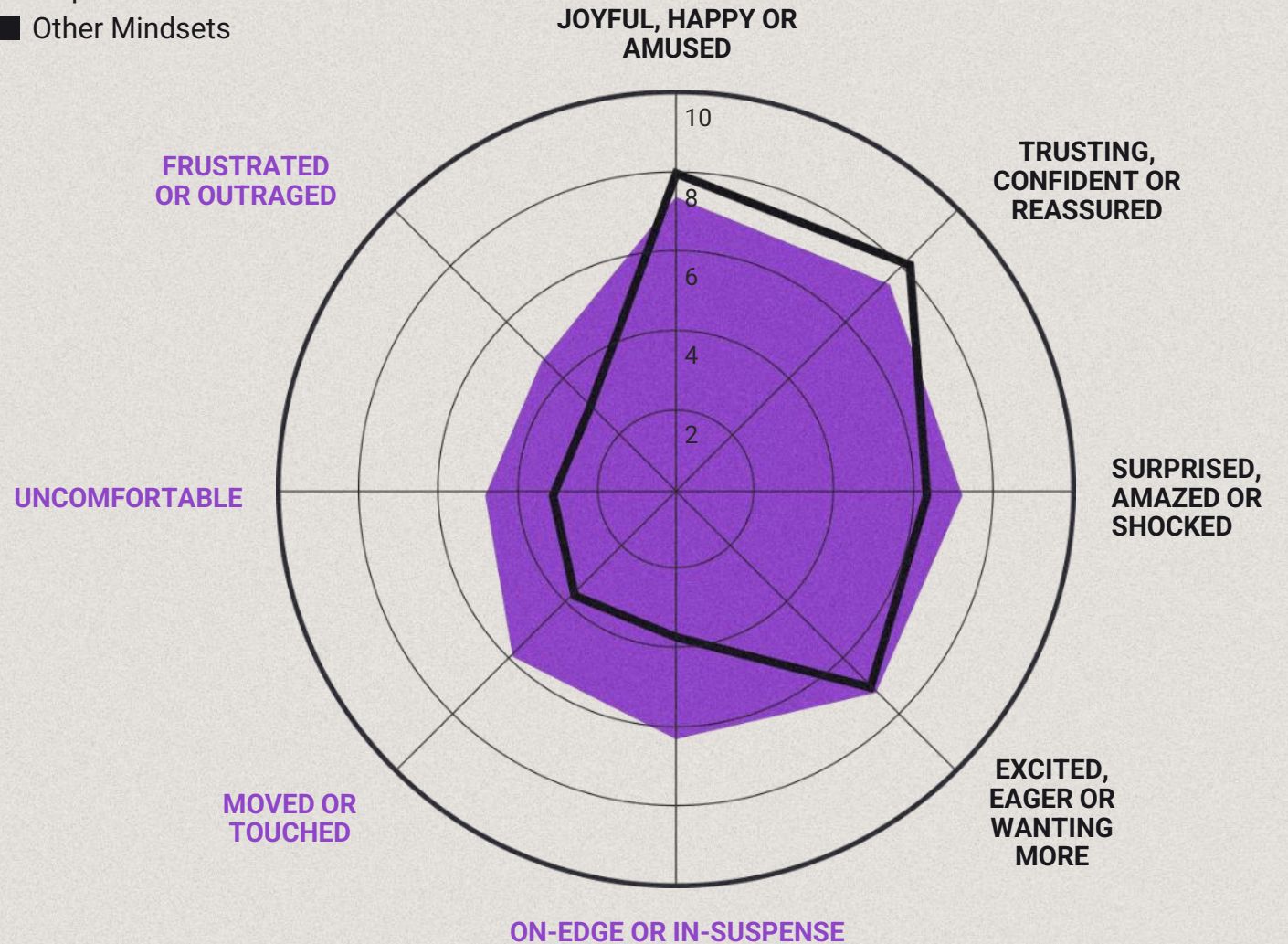
How are they feeling while listening?

Inspiration, Average Rating
(10=Very Much; 1=Not At All)

Inspiration Mindset n=619
Q: On a scale of 1 to 10, how much were you feeling the following emotions while listening to the podcast?

[Emotions while listening]

- Inspiration
- Other Mindsets



INSPIRATION MINDSET

Run traditional ads, but use somewhat shorter versions that are to the point; consider a promo code



What types of ads are preferred?

Over indexed preferences

Ad Format: Traditional Produced Ads

Type of Message: Be brief and to the point

Include Discount: Yes

Ad length: More, shorter ads

What are they listening to?

Indexed to other mindsets (100)

Topics		Tones		Formats	
True crime or mystery	132	Tense	155	Enactment of story/narrative by actors	167
Technology or gadgets	131	Suspenseful	150	Re-used content from video, radio, etc.	139
Investment or finance	125	Romantic	149	Host moderating panel of guests	122

Inspiration Mindset n=619

Q: What topic(s) were covered on the podcast?

Q: Which of the following best describes the format of the podcast?

Q: How would you describe the overall tone of the podcast?

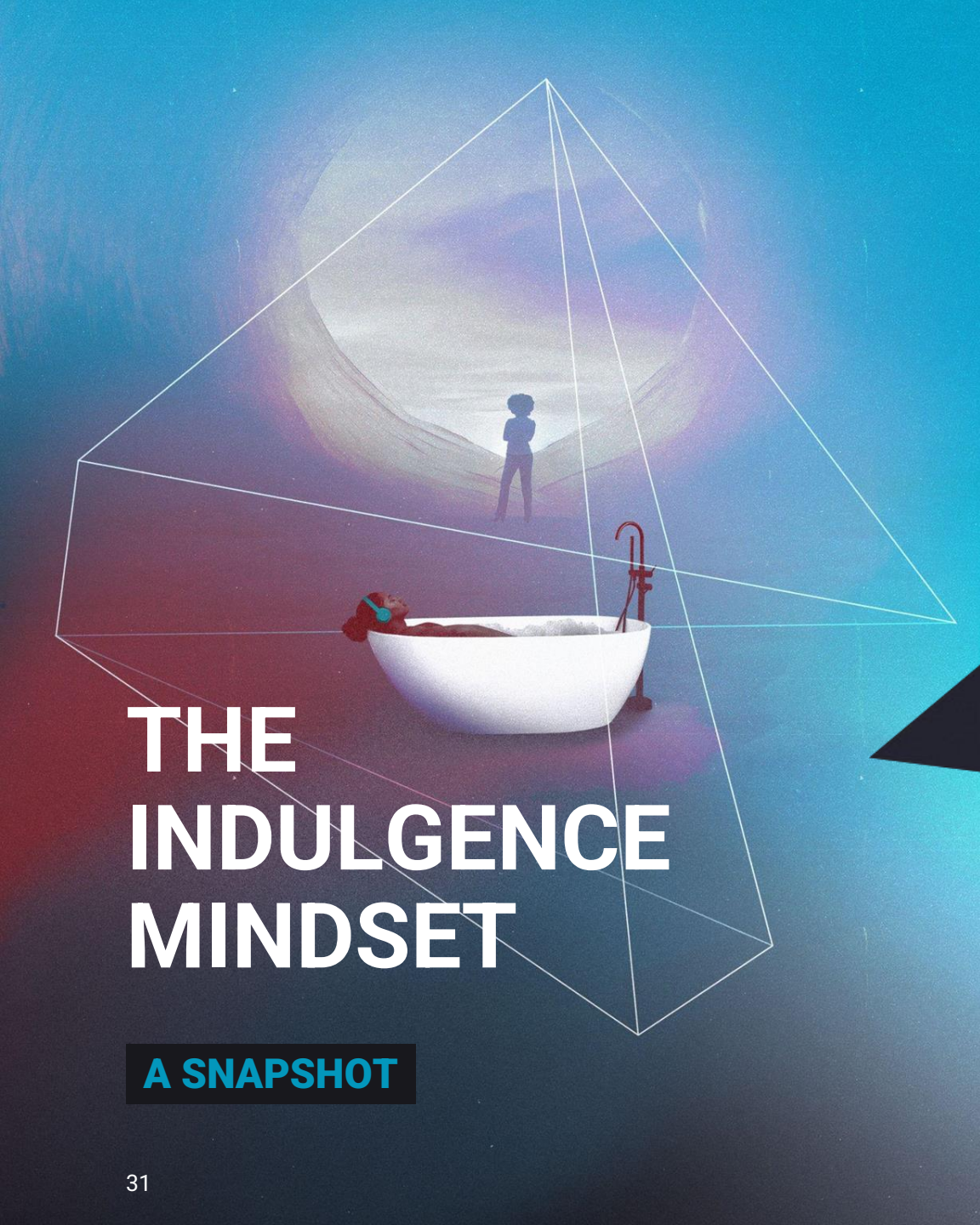
Q: How would you describe the content of the ad(s) you heard during the podcast?

Q: How many ads would you prefer during your experience?

Q: What type of ad(s) would you have been open to hearing during your experience?



THE INDULGENCE MINDSET



THE INDULGENCE MINDSET

A SNAPSHOT

PURPOSE

Be entertained and/or enjoy "me" time

EMOTIONAL RESPONSE

Joy, happiness, amusement, confidence

OPENNESS

Loyal to podcast titles; host-reads highly effective

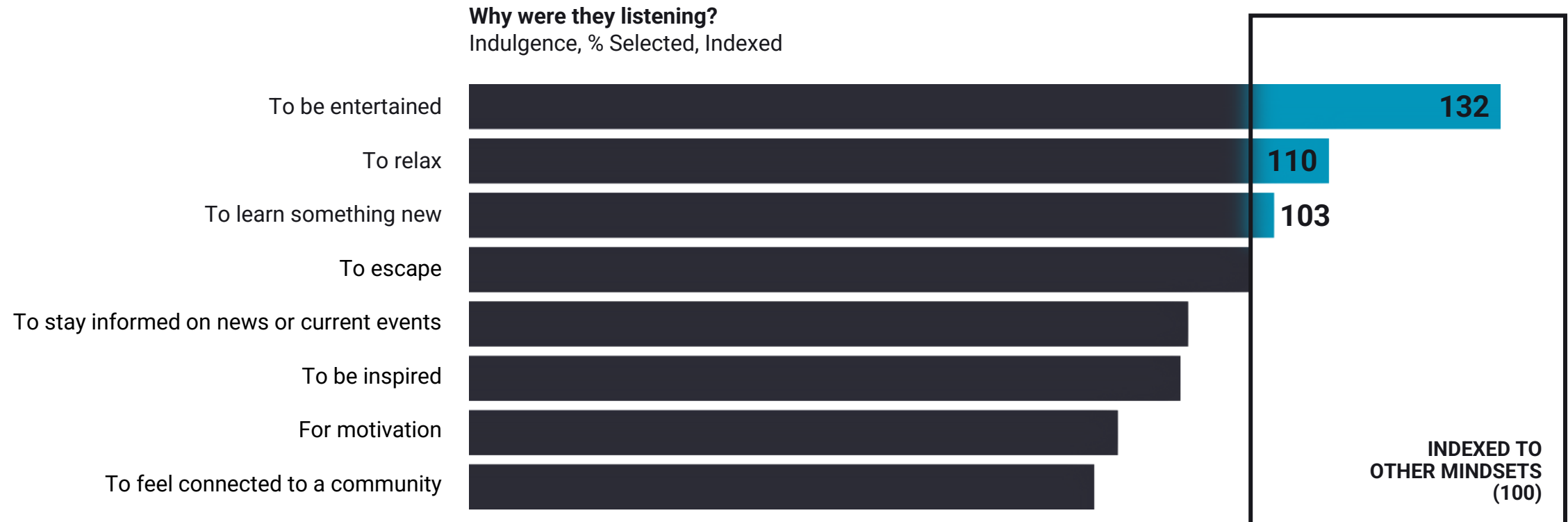
PODCAST NEEDS

Top-notch host: entertaining, relatable, knowledgeable, trustworthy

INDULGENCE MINDSET

Indulgence is all about entertainment, and not achievement

Relaxation is also a stronger driver of listenership compared to other mindsets



INDULGENCE MINDSET

Primary listening environment is the home where the focus can be on oneself

Where are they listening?
Indulgence, % Selected, Indexed

[Location]

Home
115



**INDEXED TO
OTHER MINDSETS (100)**

- Car (83)**
- Work (68)**
- Shopping area (50)**
- Public Transit (49)**
- Outdoors (49)**
- Gym (42)**
- Someone else's house (32)**
- Library (31)**
- Plane (26)**
- School (23)**

INDULGENCE MINDSET

Home environment offers quiet and few interruptions – facilitating longer listening times

What was the listening environment like?
Indulgence, % Selected, Indexed



How long did they listen?
Indulgence, % Selected, Indexed

Less than 30 minutes



30 mins to 1 hour



1 to 2 hours



Longer than 2 hours



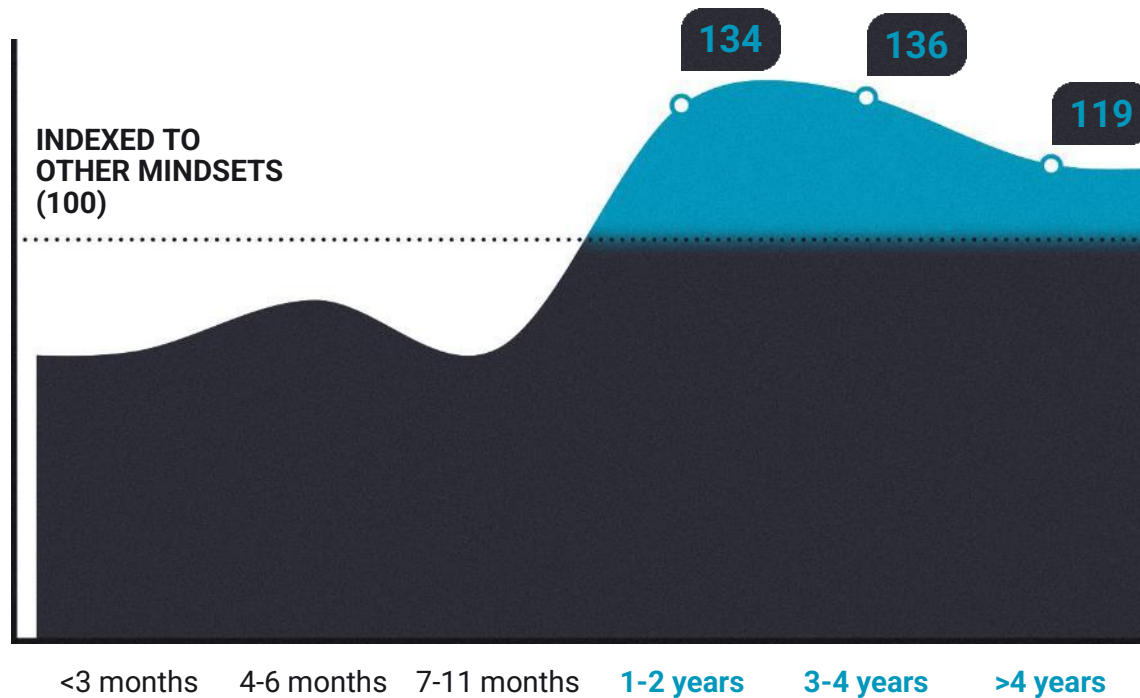
INDEXED
TO OTHER
MINDSETS
(100)

INDULGENCE MINDSET

Loyal listeners with a focus on top-notch hosts who deliver on key qualities across the board

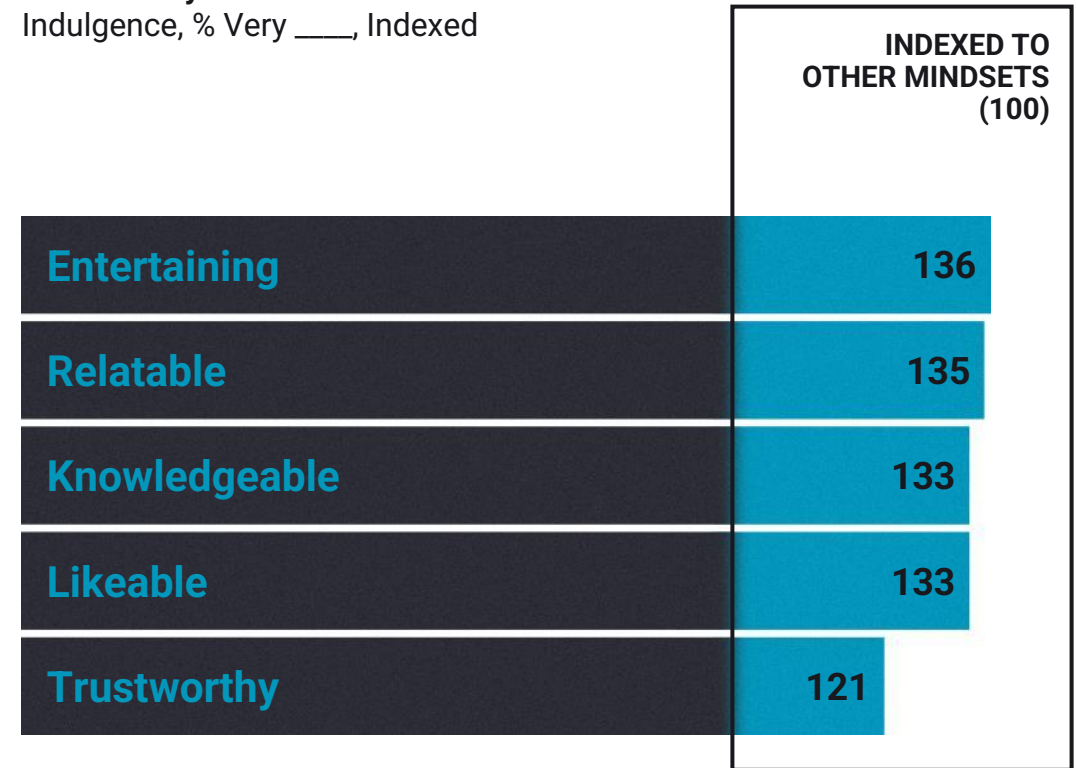
How long have they listened to the podcast title?

Indulgence, % Selected, Indexed



How do they feel about the host?

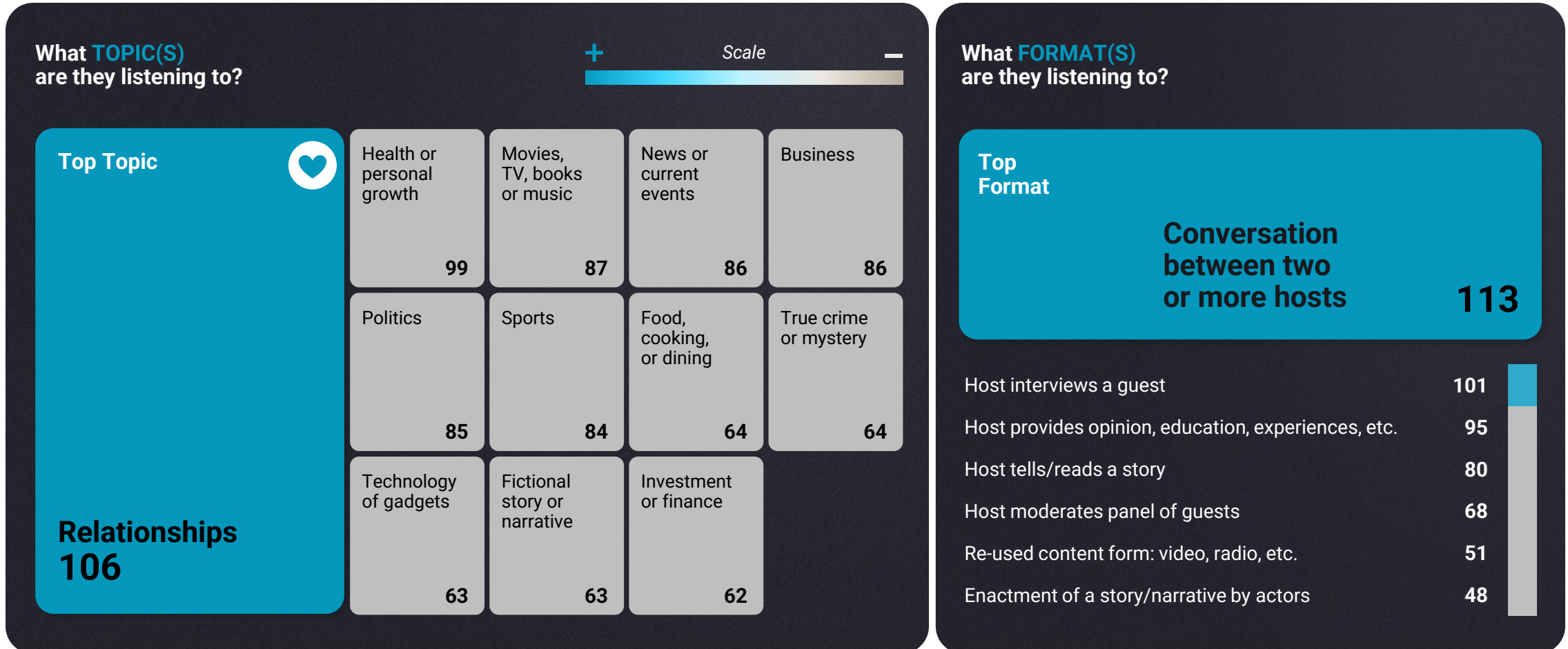
Indulgence, % Very ____, Indexed



Indulgence Mindset n=1056
 Q: How long have you been listening to this podcast?
 Q: How would you rank the podcast host on the following qualities?

INDULGENCE MINDSET

Mindset is open to all topics but shows a preference for formats where the host plays an outsized role



Indulgence Mindset n=1056
 Q: What topic(s) were covered on the podcast?
 Q: Which of the following best describes the format of the podcast?

INDULGENCE MINDSET

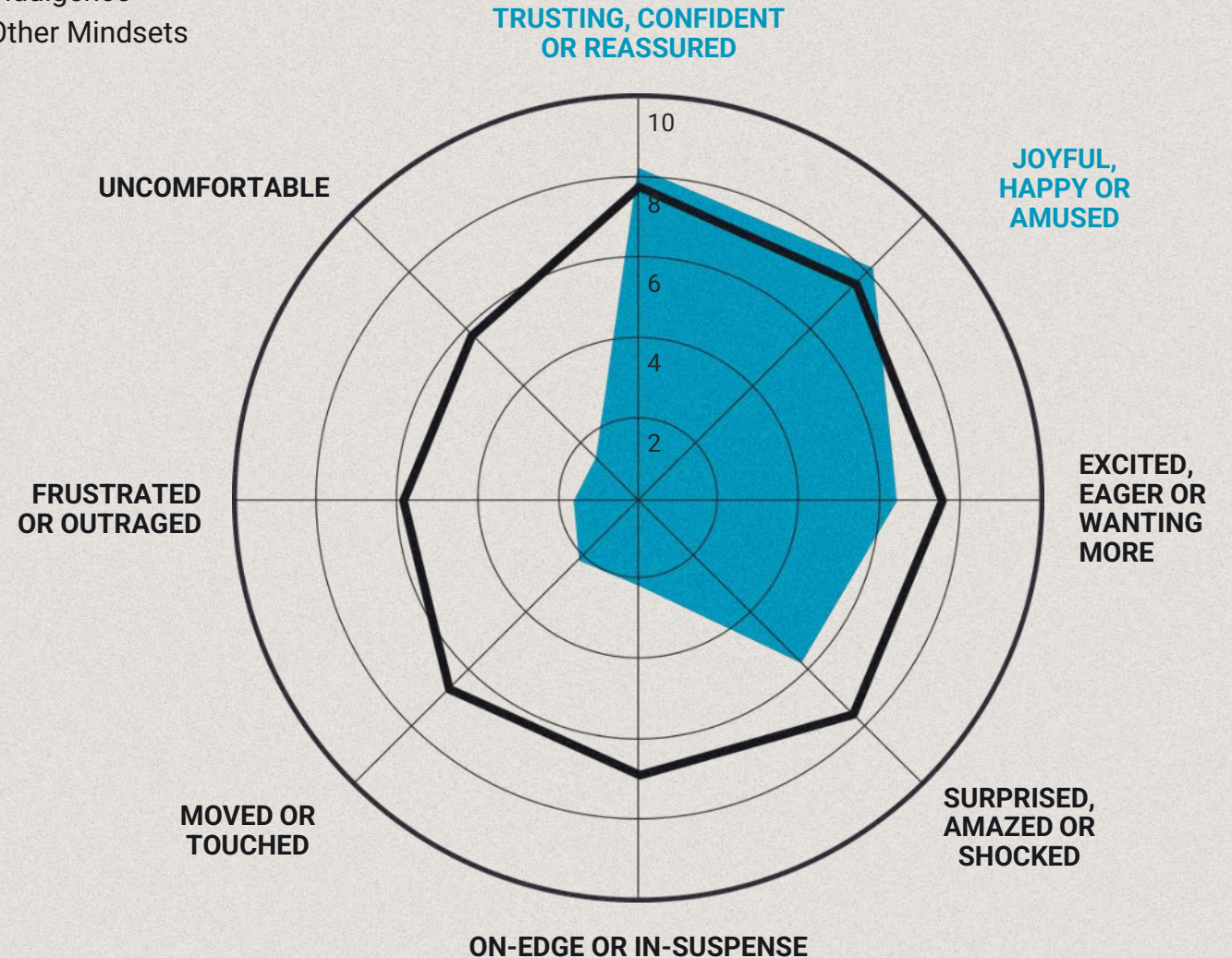
Listeners seek joy and trust, suggesting podcasts are used for “me-time”

How are they feeling while listening?

Indulgence, Average Rating
(10=Very Much; 1=Not At All)

[Emotions while listening]

- Indulgence
- Other Mindsets



Indulgence Mindset n=1056
Q: On a scale of 1 to 10, how much were you feeling the following emotions while listening to the podcast?

INDULGENCE MINDSET

Lean into host-read ads and sponsorships to avoid interruption, but focus on telling the brand's story



What types of ads are preferred?

Over indexed preferences

Ad Format: Host-read Ads or Sponsorship

Type of Message: Tell a story

Include Discount: --

Ad length: Fewer, longer ads

What are they listening to?

Indexed to other mindsets (100)

Topics		Tones		Formats	
Relationships	106	Relaxed or casual	139	Conversation between 2+ hosts	113
Health or personal growth	99	Humorous	136	Host interviewing a guest	101
Movies, TV, books or music	87	Business-like or professional	86	Host's opinion, education, experiences, etc.	95

Indulgence Mindset n=1056

Q: What topic(s) were covered on the podcast?

Q: Which of the following best describes the format of the podcast?

Q: How would you describe the overall tone of the podcast?

Q: How would you describe the content of the ad(s) you heard during the podcast?

Q: How many ads would you prefer during your experience?

Q: What type of ad(s) would you have been open to hearing during your experience?

DELIVERING ON AD PREFERENCES BY MINDSET

M/GNA MEDIA TRIALS | VOXMEDIA



Marketers can deliver on ad preferences by mindset

What types of ads are preferred by each mindset? Over indexed preferences	Interconnect Leverage longer ads that focus on telling the brand's story; consider a promo code	Inspiration Run traditional ads, but use somewhat shorter versions that are to the point; consider a promo code	Indulgence Lean into host-read ads and sponsorships to avoid interruption, but focus on telling the brand's story
Ad Format	Any Format	Traditional Produced Ads	Host-read Ads or Sponsorship
Type of Message	Tell a story	Be brief and to the point	Tell a story
Include Discount	Yes	Yes	--
Ad length	Fewer, longer ads	More, shorter ads	Fewer, longer ads

Interconnect Mindset n=310; Inspiration Mindset n=619; Indulgence Mindset n=1056
 Q: Which of the following best describes the format of the podcast?
 Q: What type of ad(s) would you have been open to hearing during your experience?
 Q: How many ads would you prefer during your experience?

Marketers can look to podcast characteristics for planning by mindset

Defining the nature of a podcast is up to the ad buyer and/or the media owner

What is each mindset listening to?

Indexed to other mindsets (100)

	Interconnect	Inspiration	Indulgence
Topics	Food, cooking, or dining 165 Investment or finance 164 Fictional story or narrative 160	True crime or mystery 132 Technology or gadgets 131 Investment or finance 125	Relationships 106 Health or personal growth 99 Movies, TV, books or music 87
Tone	Somber 256 Gritty 220 Tense 206	Tense 155 Suspenseful 150 Romantic 149	Relaxed or casual 139 Humorous 136 Business-like or professional 86
Formats	Re-used content from video, radio, etc. 179 Enactment of story/narrative by actors 155 Host moderating panel of guests 149	Enactment of story/narrative by actors 167 Re-used content from video, radio, etc. 139 Host moderating panel of guests 122	Conversation between 2+ hosts 113 Host interviewing a guest 101 Host providing opinion, education, experiences, etc. 95

Interconnect Mindset n=310; Inspiration Mindset n=619; Indulgence Mindset n=1056

Q: What topic(s) were covered on the podcast?

Q: Which of the following best describes the format of the podcast?

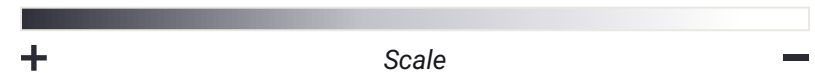
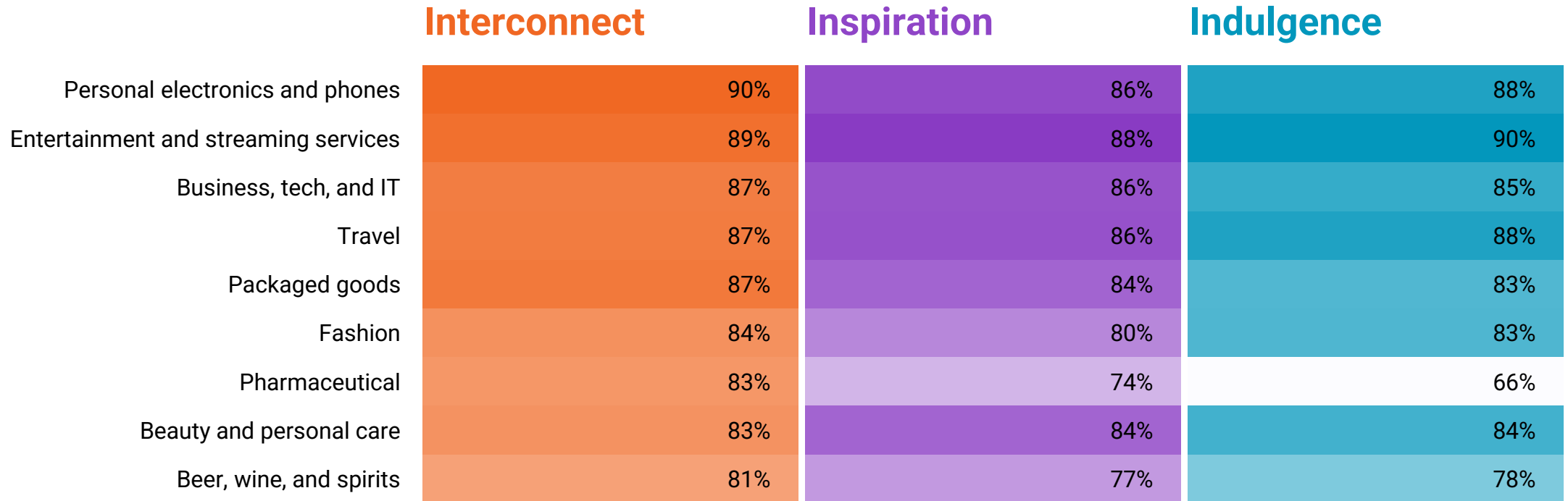
Q: How would you describe the overall tone of the podcast?

Mindsets are product agnostic when it comes to ads

Vast majority of listeners feel any vertical is suitable, regardless of their mindset

What products are most suitable for advertising to each mindset?

% strongly agree/agree





Questions to ask for planning ads by listener mindset

Think beyond traditional genres....

- What topic is being discussed?
- What is the overall tone of the podcast?
- What is the format of the podcast?
- Does the podcast have loyal repeat listeners?
- How long is the podcast?

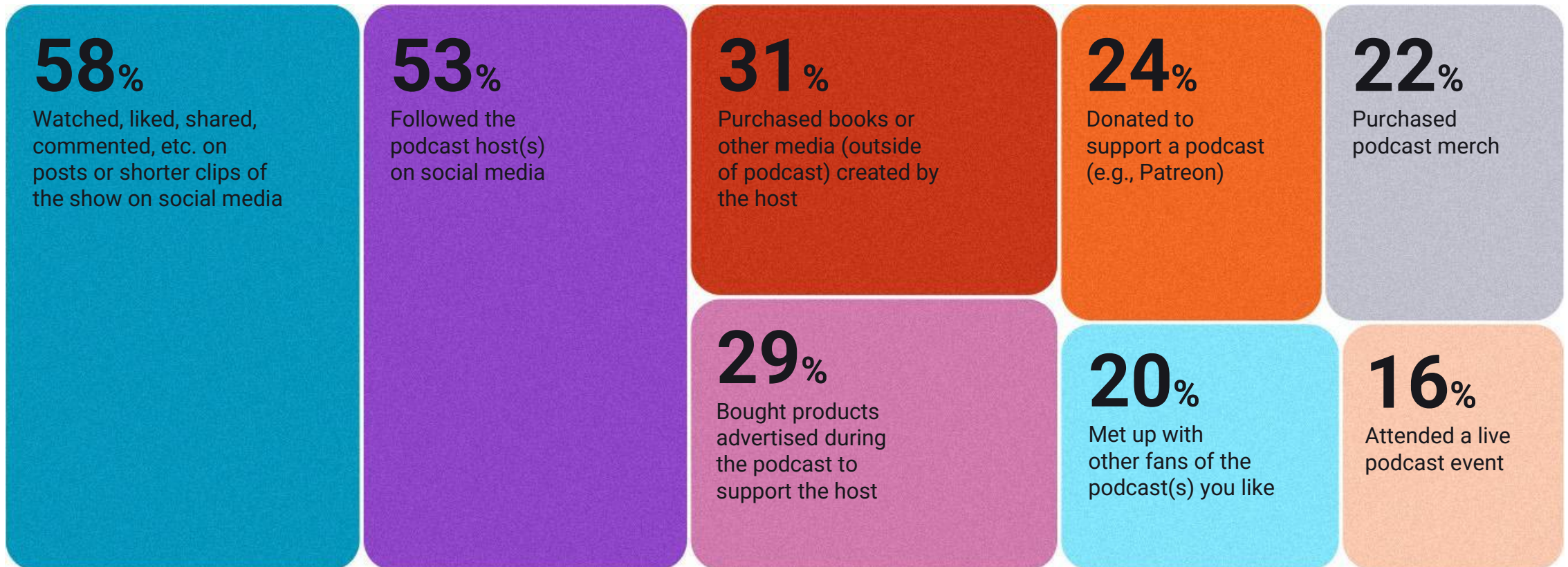


PODCAST ENGAGEMENT IS **EXPANDING**

From listening to loyalty: podcast fans engage beyond audio

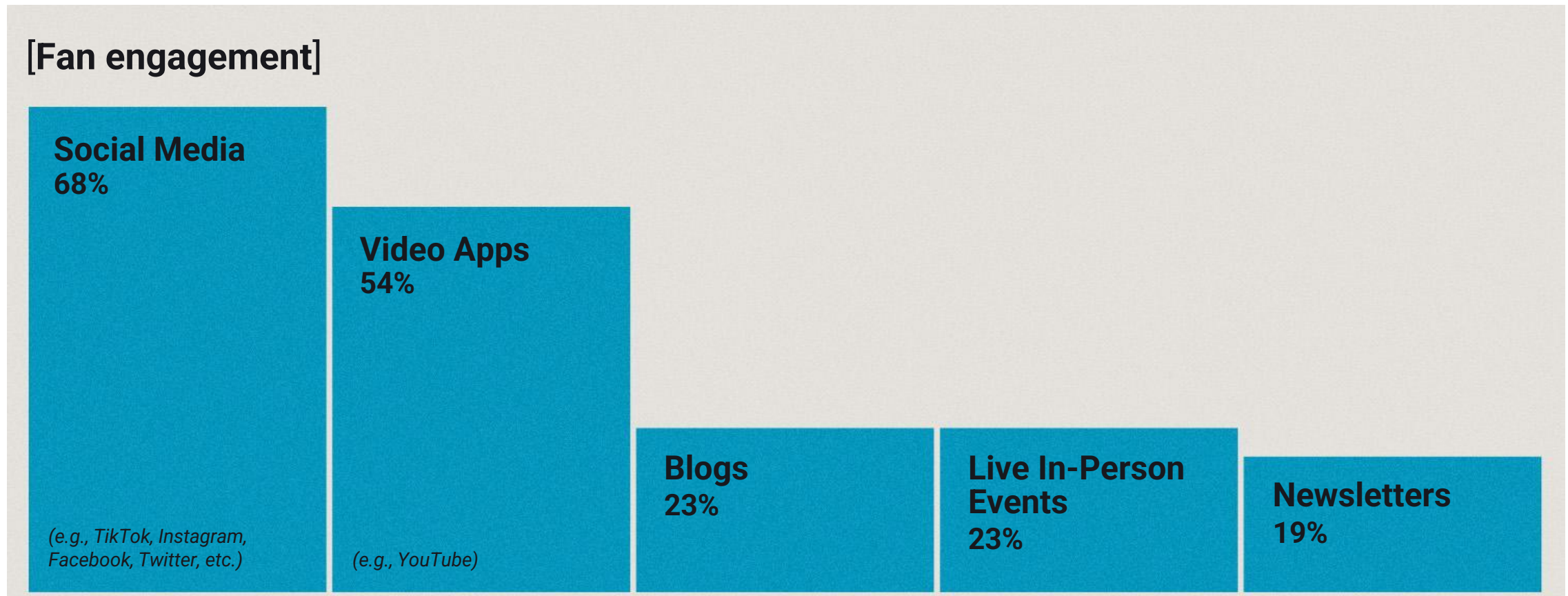
How else do listeners engage with the podcast?

% selected



Fans engage with podcasters across social, video, and in-person channels

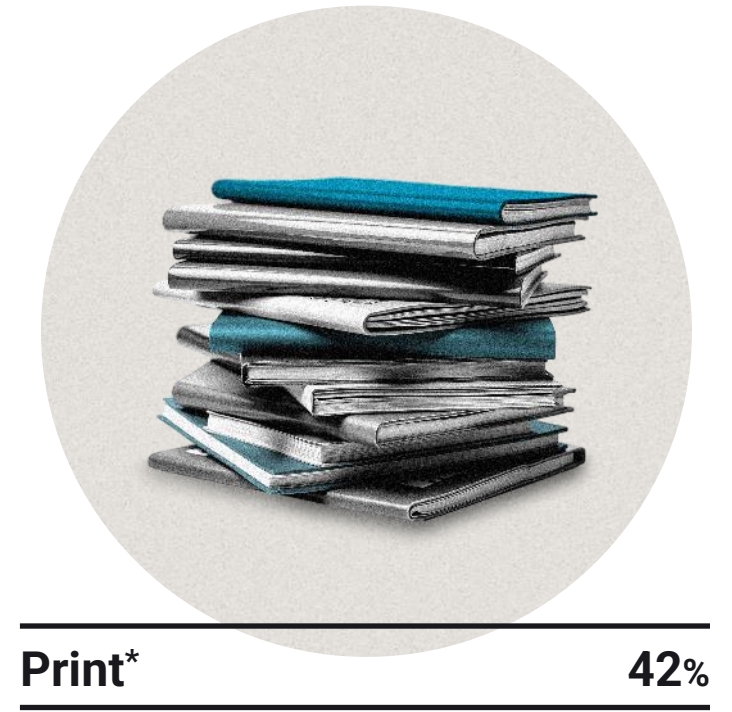
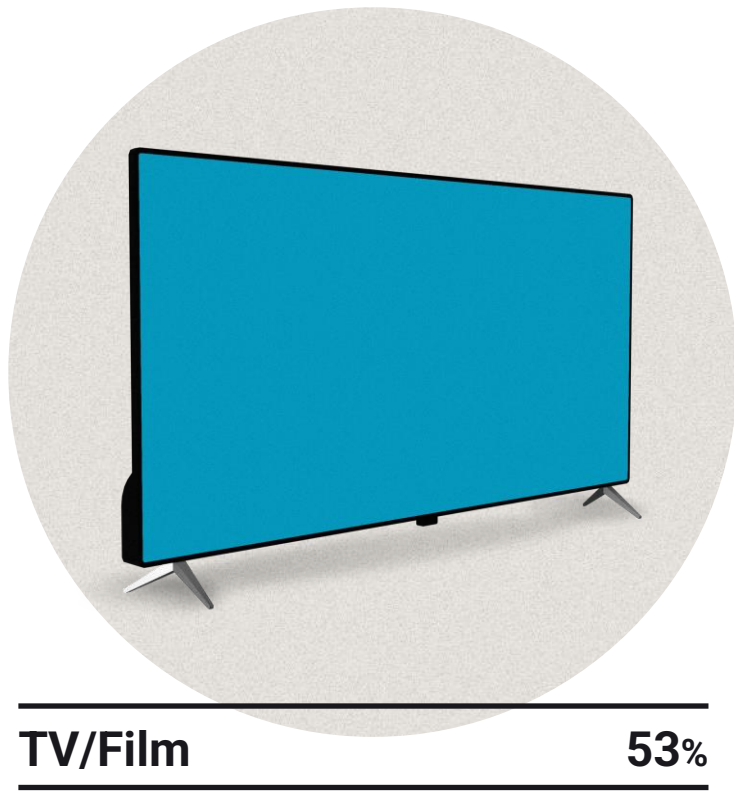
How else do listeners engage with the podcast? - % selected



Fans want their favorite hosts on every screen and page

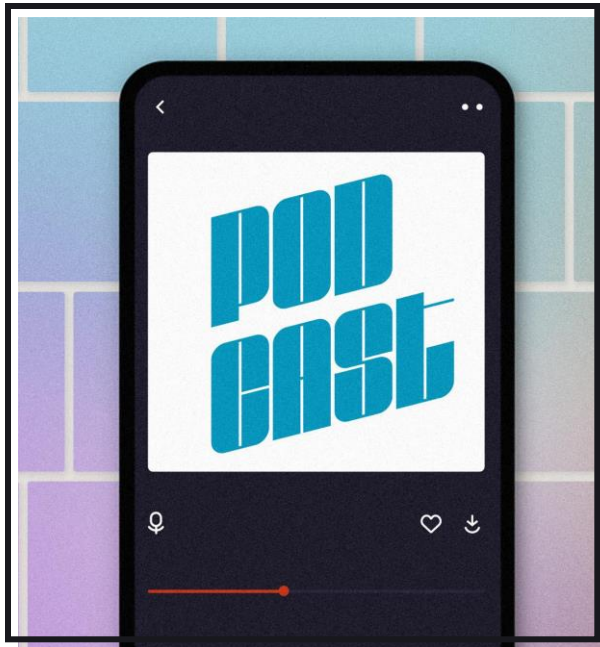
Where else would fans like to see their favorite podcasters??

% selected



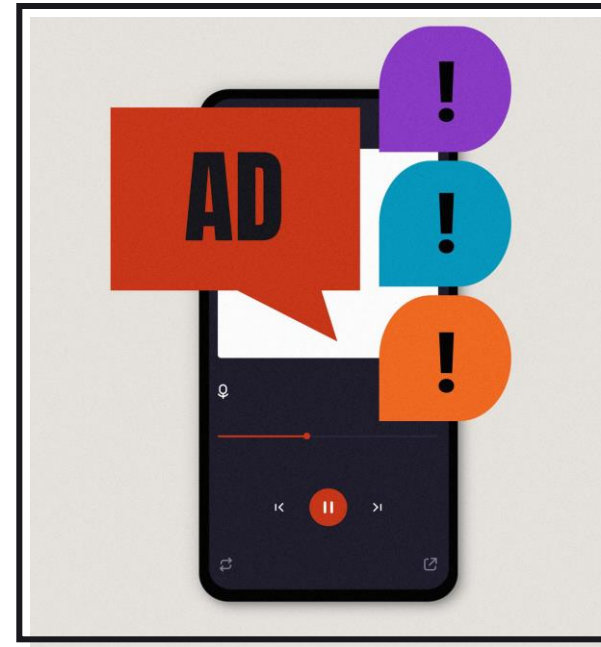
* (e.g., books, journals, articles)
Source: MAGNA Media Trials & VOXMEDIA, A New Era of Influence
Q: What other types of content would you like to see your favorite podcaster(s) in?

Implications



Think beyond audiences alone

Podcasts offer a breadth of experiences, and brands can go beyond audience alone and consider mindset when advertising



Strategize with media partners

Work closely with your ad buyer and media owners to identify which podcasts fit each mindset and customize ads accordingly