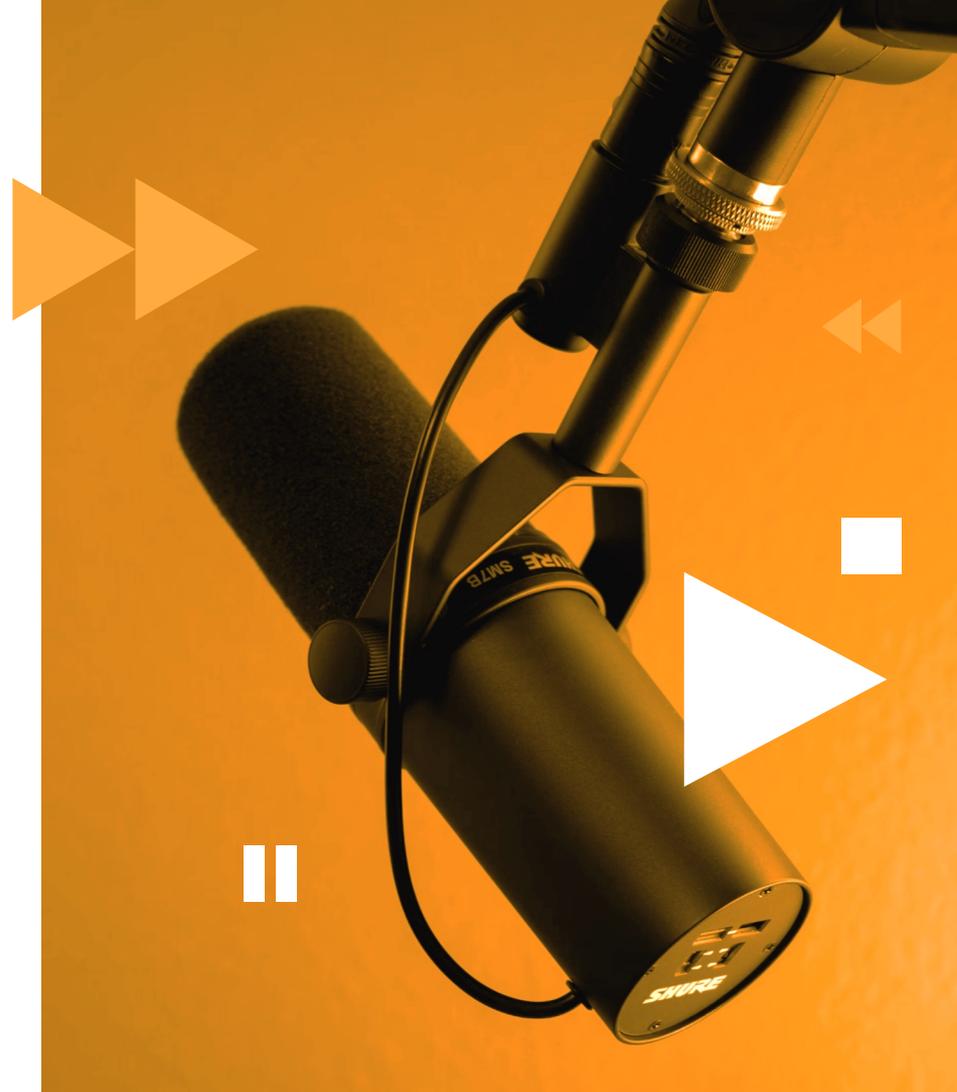ANIMA

THE POD NETWORK ENTERTAINMENT

puma podcast

Beyond the Headphones:
The Portrait of a Podcast Listener as Filipino

THE FOURTH WALL
RESEARCH AND ANALYSIS THROUGH THE FILIPINO LENS

METHODOLOGY

Approach

Sociocultural
(Mixed-Methods)
Research

Activities
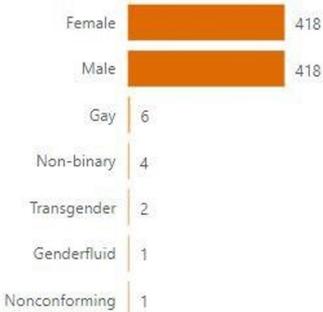
Survey,
Social Listening

Timeline

October 23 -
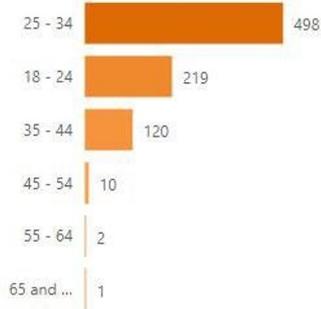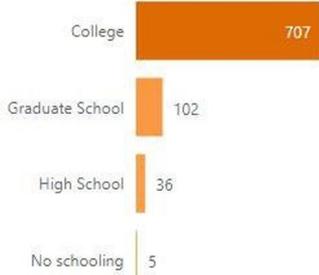November 22, 2023

Survey Demographics

850 Respondents

Age
- 25 - 34: 498
- 18 - 24: 219
- 35 - 44: 120
- 45 - 54: 10
- 55 - 64: 2
- 65 and ...: 1

Gender
- Female: 418
- Male: 418
- Gay: 6
- Non-binary: 4
- Transgender: 2
- Genderfluid: 1
- Nonconforming: 1

Educational Attainment
- College: 707
- Graduate School: 102
- High School: 36
- No schooling: 5

Are you married?
- No: 730 (85.88%)
- Yes: 120 (14.12%)

Are you employed?
- Yes: 619 (72.82%)
- No: 231 (27.18%)

Area of Residence
- NCR: 366
- Region 4A: 242
- Region 3: 97
- Region 7: 34
- Region 6: 26
- Region 5: 17
- Region 1: 13
- Region 10: 12
- Region 11: 10
- Region 2: 9
- Region 8: 8
- Region 4B: 4
- CAR: 3
- Region 9: 3
- BARMM: 2
- Region 12: 2
- Region 13: 2
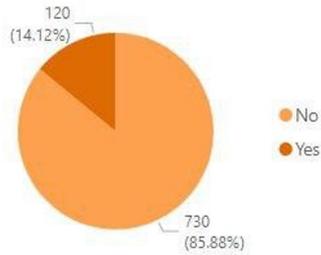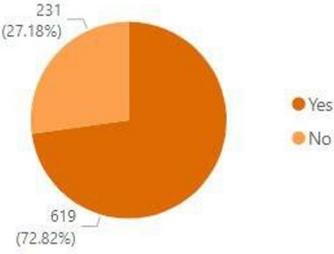
OVERVIEW OF PODCAST POPULARITY

2020

MEDIA PLATFORM PREFERENCES
Number of Respondents: 439

- Social Media Networks (84.7%)
- Web Search Engines (67.0%)
- Online Video Streaming Sites (44.0%)
- Television (43.7%)
- Online News Portal (27.6%)
- Podcasts / Online Audio Streaming (22.5%)
- Radio (8.2%)
- Printed Newspaper (1.8%)
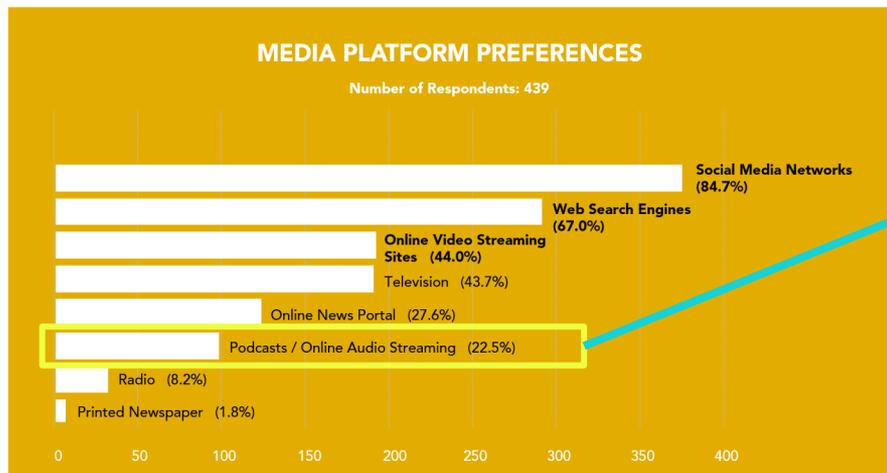
2023

Media Preference

Number of Respondents: 850

- Internet — 81.9%
- Social Media Networks — 80.8%
- Podcast — 50.5%
- YouTube — 40.4%
- Online News Portal — 22.1%
- Television — 19.9%
- Radio — 3.2%
- Printed Newspaper — 1.4%
- Books — 0.1%
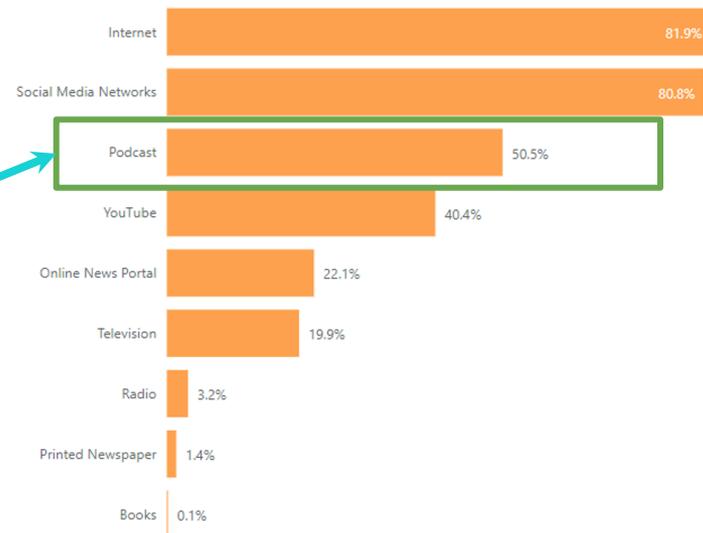
Since 2020, when we last surveyed Filipinos' media platform preferences, the **podcast's popularity has been rising.** While internet and social media remained the most preferred information platforms, in 2023 **the podcast has now surpassed other media platforms as the most preferred information source** (i.e., television, online video streaming sites (YouTube), and online news portals).

Podcasts as the New Trusted Source of Information

% Share of internet connected Filipinos aged 16 - 64 listening to podcasts weekly

19.8%

Year-on-Year Growth in % Share of Filipinos aged 16 - 64 listening to podcasts weekly

+2.6%

PH has an internet connected population of 86.98M Filipinos

Indeed, Meltwater's 2024 statistics on Filipino digital behavior suggests that **19.8% of Filipino adults listens to podcasts weekly.** It **increased by 2.6%** from 2023.
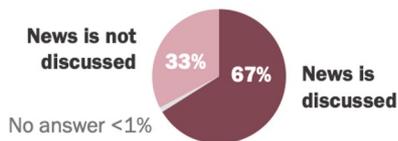
Podcasts as the New Trusted Source of Information

Roughly half of Americans say they have listened to a podcast in the past year

% of U.S. adults who have ____ to a podcast in the past 12 months

Not listened	Listened
51%	49%

% who say __ on the podcasts they listen to

News is not discussed 33%

67% **News is discussed**
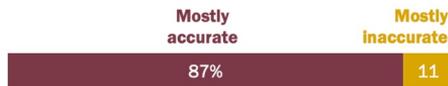
No answer <1%

Source: Survey of U.S. adults conducted Dec. 5-11, 2022. "Podcasts as a Source of News and Information"

PEW RESEARCH CENTER

Most listeners who get news on podcasts expect it to be mostly accurate

*Among U.S. podcast listeners who hear news discussed on the podcasts they listen to, % who say they **expect the news to be** ...*

Mostly accurate	Mostly inaccurate
87%	11

*Among U.S. podcast listeners who hear news discussed on the podcasts they listen to, % who say they **trust that news** ...*

More than news they get from other sources	About the same	Less than news they get from other sources
31%	55	15

Note: "Podcast listeners" in this report are those who have listened to a podcast in the past 12 months. Respondents who did not answer not shown.
Source: Survey of U.S. adults conducted Dec. 5-11, 2022. "Podcasts as a Source of News and Information"

PEW RESEARCH CENTER

And this **mirrors the global trend** where podcasts are becoming **one of the leading sources of information.**

For example, in a study conducted by Pew Research Center in December 2022, 67% of American podcast listeners claim that the podcasts they subscribe to discuss news and current events. And of those who get news from podcasts, 87% expect the information to be mostly accurate.

Podcast Listenership & Marketing Growth

Podcast growth climbed higher this year.

Podcasts grew in popularity among consumers, and that trend extended to advertisers. Podcast ads have accelerated by +40% YoY on Spotify, making them the fastest-growing ad product on Spotify.[4]

Podcasts extend the conversation.

Podcasts keep the cultural conversation flowing, and they're reaching an engaged audience. Advertisers are having their say, too: On average, we found that first-time U.S. Podcast advertisers saw a +95% incremental lift in reach when advertising in podcasts on Spotify in 2023.[7]

Source: Spotify 2023 Wrapped for Advertisers: Top 10 trends and takeaways

As more people in the Philippines and worldwide tuned in, podcasts become **a more promising channel to market goods and services.**

As Spotify's statistics also reveal, the impact of podcasts extends beyond the duration of the episodes. **As people talk about the content after listening, so do the brands they have encountered through the different ad placements.**

IN A NUTSHELL

1 There is a **growing potential for podcast advertisers** because of the podcast's increasing importance and popularity as an information platform locally and globally.

2 But the key to tapping this potential is understanding why podcast listeners listen to podcasts in the first place, which will necessitate a **deep understanding of their behavior.**

THE PODCAST AUDIENCE IN PH

Demographic Profile

Predominantly **Millennials or Gen Ys** (25 - 34)

Highly educated, with an overwhelming majority having at least a **college degree**

Majority are **employed**

Mostly concentrated in the **urban areas** - Greater Manila Area

Top Considerations in Media Platform Choice.

Consideration	Percentage
Accessibility	81.65%
Convenience of use	74.35%
Platform's popularity	47.88%
Variety of functionalities	25.88%
Platform's reach	19.18%
Price	16.82%
Ability to interact with the hosts	11.53%
Ability to give feedback	10.24%
Ability to interact with other listeners	9.53%
Credibility	1.41%
Quality of content	0.94%
Relevance	0.47%
Control over feed	0.12%
Production value	0.12%

Media Habits

The rise of podcasts as a preferred platform alongside social media and the internet among Filipino millennials may be explained by the respondents' **prioritization of accessibility (82%)** and **convenience (74%) when choosing their media platform.**

Media Habits

95%

Consume media platforms daily

71%

Consume podcasts everyday

56%
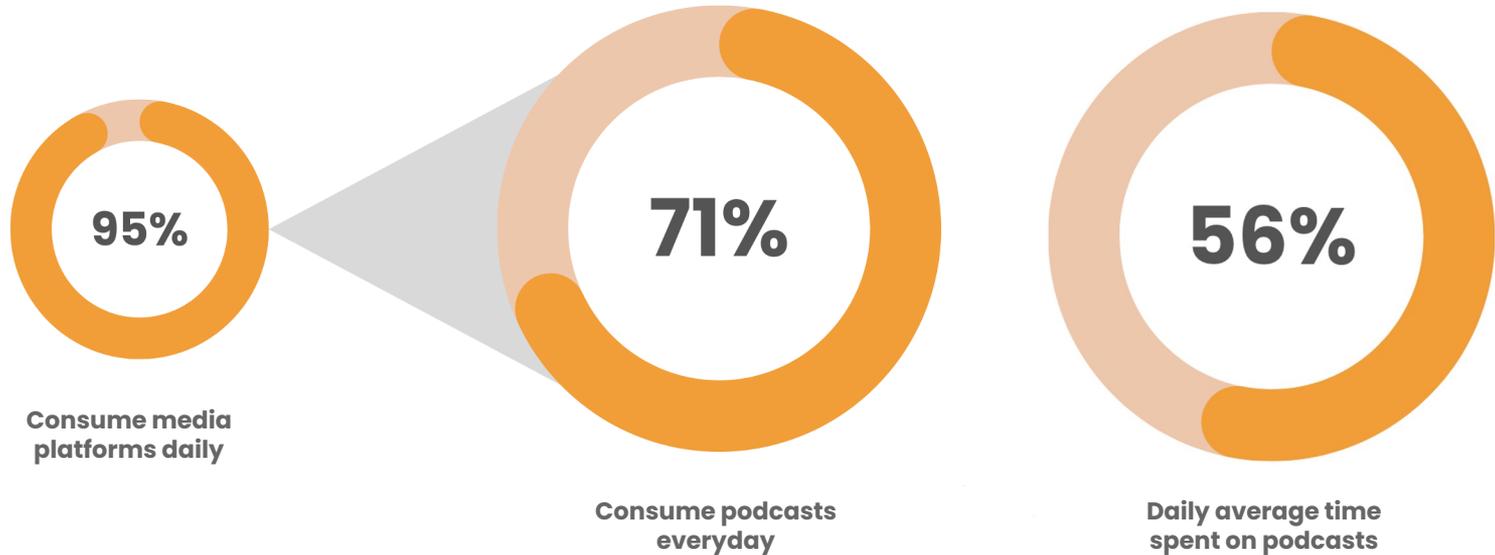
Daily average time spent on podcasts

Indeed, **71% of those who consume media platforms daily also consume podcasts** every day. Moreover, **about 56%** of their daily average time of media consumption is **spent on podcasts.**

Podcast Entry-Point

Podcast audiences usually try podcasts because of **personal recommendations from friends** or **because the content they see on social media triggers their curiosity.**

Podcast Listening Habits

The majority of podcast audiences tend to listen to podcasts **after work/school hours**, when **commuting or while doing household chores.** Meanwhile, a sizeable number of audiences also listen **before work/school hours**, such as **in the morning**.

AD PLACEMENT STRATEGY TO CONSIDER

Consider publishing podcast ads and contents during podcast's "primetime".

Like the legacy media platforms (e.g., TV, radio), podcast also has a primetime, when listeners are likeliest to engage in a podcast show. The research indicates that this "primetime" falls at around **6:00 pm to 8:00 pm**, after work hours.

Podcast Motivation

Consistent with the global trend, the reason why podcast audiences tend to watch/listen to podcasts before or after work hours is because they **primarily seek <u>entertainment</u>** with a little bit of information.

ADVERTISING OPPORTUNITIES

Top Contents Consumed.

Content	Percentage
Comedy	74.47%
Personal Development	64.12%
Culture, theatre, literature, book...	55.53%
Politics	49.29%
Travel and Tourism	37.76%
Health and Wellness	36.00%
Relationships (e.g. love advice)	29.65%
Technology, IT	23.65%
Financial Well-being	22.82%
Economy	21.53%
Horror, Mystery	18.71%
Fashion	16.12%
Drama	9.65%
Weather Forecast	9.06%
Housekeeping practices	7.41%
Spiritual/Religious	6.24%
Automotive	4.94%
Horoscope	3.76%
Children's stories, content	2.82%
Sports	1.29%
Education	1.06%
Food	0.94%
News	0.82%
Music	0.71%
Entertainment	0.35%
Gaming	0.35%
Pop Culture	0.35%
History	0.24%

Podcast Content Preference

The desire for entertainment and information reflects in the Filipino audience's podcast content preferences. The primary content consumed across all demographics is **comedy**, selected by **74% of the respondents.** This is followed by **personal development (64%), culture (55%), and politics (49%)**.

Frequently Cited Contents per Genre

Comedy
- The KoolPals
- Typical Pinoy Crap
- Bugoy na Koykoy
- Machong Chismisan
- Minimum Wage, Maximum Rage

Personal Development
- Adulting with Joyce Pring
- Paano Ba To
- Jay Shetty

Culture, Theatre, Book, Literature
- Trash Taste Podcast
- One Piece Podcast
- Thirty-Forty

Politics
- Teka-Teka News
- Facts First
- Today: Explained by Vox

Travel and Tourism
- Escape: Story from the Road
- The Poor Traveler
- The Travel Diaries

Health and Wellness
- Psych2Go
- Kilimanguru
- For the Healthy Hoes

Relationships
- Skypodcast
- Modern Love
- Barangay Love Stories

Technology, IT
- Darknet Diaries
- Techlinked
- Accidental Tech Podcast

FInancial Well-Being
- The Ramsey Show
- Planet Money
- Leadership Stack

Economy
- Freakonomics Radio
- The Economics of Everyday Things
- Usapang Econ

Horror, Mystery
- Sitio Bangungot
- The Philippine Campfire Stories
- Lagim

Fashion
- Dressed: The History of Fashion
- Dress: Fancy: The Podcast About Dressing Up
- The Style that Binds Us

Drama
- Barangay Love Stories
- Rotten Mango
- Hi Nay

Weather Forecast
- The Weather Channel
- Capital Weather Gang
- Weather Geeks

Housekeeping Practices
- A Slob Comes Clean
- ClutterBug Podcast
- Canyon Home

Spiritual/ Religious
- The Bo Sanchez Podcast
- The Bible in a Year
- Victory Podcast

Automotive
- The Rally Pod
- Everyday Driver
- We are Auto

Horoscope
- Tsaarology
- Astrology Eme with CESD
- Horoscope by Dreamscope

Children's Stories
- Story Time
- What if World?
- Stories Podcast

Sports
- Thinking Basketball
- Wrestling Wrestling Podcast
- Unmasked
- The Global Bounce

Education
- Ted Talks Daily
- The Saad Truth
- TED-Ed Radio
- DNA Today

Food
- Food We Need to Talk
- The Food Chain
- The TASTE Podcast

News
- The Howie Severino Podcast
- The View: Behind the Table
- CNN this Morning

Music
- The Daebak Show
- Lost Notes
- Bandsplain

Entertainment
- Dear MOR
- Ang Walang Kwentang Podcast

Gaming
- I win to lose gaming
- Techlinked
- Game Scoop!

Pop Culture
- Telebabad Tapes
- The Kimbop! Show
- Geek PD

History
- History on Fire
- Revisionist History by Malcolm Gladwell
- Philippine History Today

Podcast Level of Engagement

On a scale of 1 (Very Low) to 5 (Very High), the following is the average **level of engagement** of the respondents on podcast:

Average Level of Engagement

3.24

Moderate

Overall, the respondents are **moderately engaged** in podcasts. And there are **six levels of engagement**, as revealed in the survey.

Podcast Engagement Levels

Level 1: Listener	Level 2: Follower	Level 3: Reactor	Level 4: Sharer	Level 5: Commentator	Level 6: Interactor
• Plain, occasional listeners • Listens when they are on the mood • Led to podcast by **personal recos**	• Listeners who followed or subscribed to the show • Followed the podcast because the **topic of the show resonates with them personally**	• Followers in social media who frequently react (i.e., like, heart, care, etc.) • They react because the **hosts and/or guests' ideas resonate with them personally**	• Reactors in social media who frequently share the podcast's contents in their social media • They share because they **believe that the hosts and/or guests' ideas will resonate with others personally**	• Sharers in social media who frequently comment in the podcast's content • They comment because they think the **hosts have built a personal rapport with them** (e.g., by replying to their shares)	• Commentators in social media who frequently talk with others in the podcast community • They interact because they **personally unite with the hosts advocacies,** as if the success of the podcast and its host is considered their own

The Share of Respondents (as % of the total) per Podcast Engagement Level

Level 6: Interactors	20.5%	
Level 5: Commentators	25.5%	High
Level 4: Sharers	38.2%	
Level 3: Reactors	58.4%	Moderate
Level 2: Followers	78.8%	Low
Level 1: Listeners	100.0%	

Podcast Engagement

The respondents believe boosting engagement will depend on (1) the topic and (2) the host.

In their view, for a podcast show to be engaging, its topic must be both **entertaining and informative**. Moreover, the host must build a **personal connection** with the listeners through interactions.

Podcast Level of Engagement & Trust

On a scale of 1 (Very Low) to 5 (Very High), the following is the average **level of engagement and trust in the show** of the respondents on podcast:

Average Level of Engagement

3.24

Moderate

Average Level of Trust in Shows

3.70

High

The positive news is that the respondents' level of trust in podcast shows (3.70) surpasses their level of engagement (3.24). Overall, **they highly trust podcasts even if they are less actively engaged.**

Trust in Podcast Shows

The reason behind the audience's high trust in podcast shows, even if they are less actively engaged, is that they **already search for the credibility of the host and the show before subscribing to it**.

Besides, **they are conscious** that **podcast hosts inevitably express their opinions or biases**, and it is up to the audience to discern whether to share the same opinion.

Podcast Level of Engagement, Trust, and Likelihood of Conversion to Purchase a Product

On a scale of 1 (Very Low) to 5 (Very High), the following are the respondents' average **level of engagement, trust,** and **likelihood of conversion to purchase a product from podcast ads:**

Average Level of Engagement	Average Level of Trust in Podcast Shows	Average Likelihood of Conversion to Purchase
3.24	**3.70**	**3.26**
Moderate	High	Moderate

Overall, there is **moderate to high level of engagement, trust, and conversion to purchase a product** among Filipino listeners.

A Podcast Audience's Typical Journey So Far

1. Entry Point

| Trigger | Recommendation from family, friends, social media |
| Action | **Tries to listen** to the podcast recommended |

2. Listening

| Trigger | Before and after work, while commuting, driving, chores |
| Action | Listens to something **entertaining but also informative** |

3. Engagement

| Trigger | Personal interactions with the hosts, podcast community |
| Action | Listens AND also **follows, reacts, shares, comments, interacts** |

4. Trust
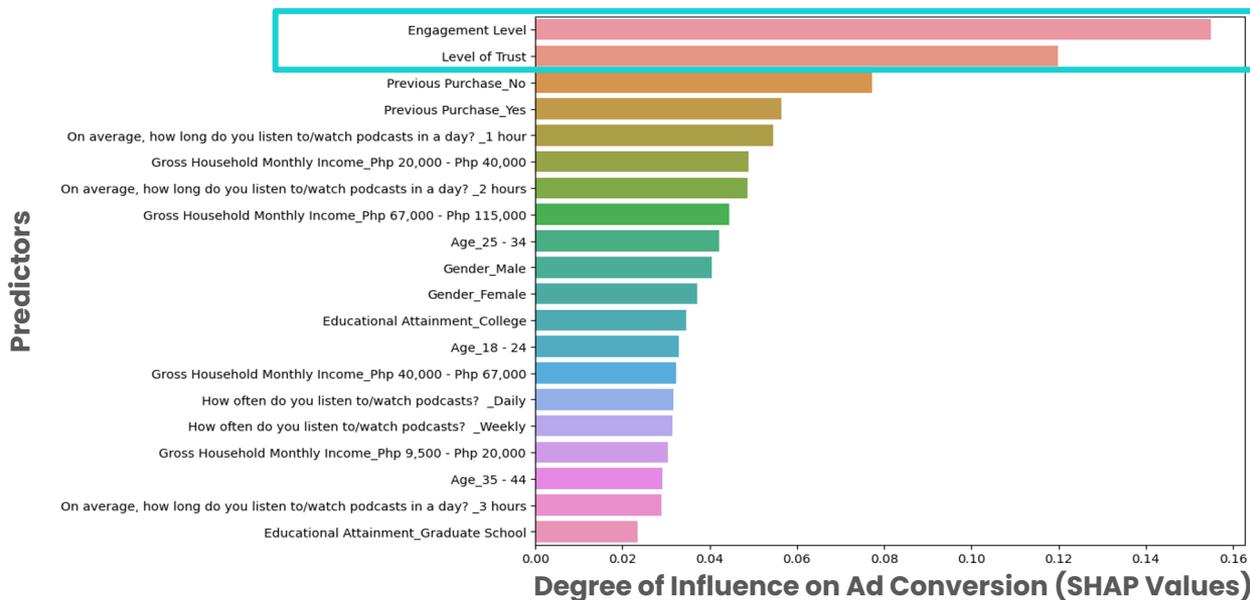
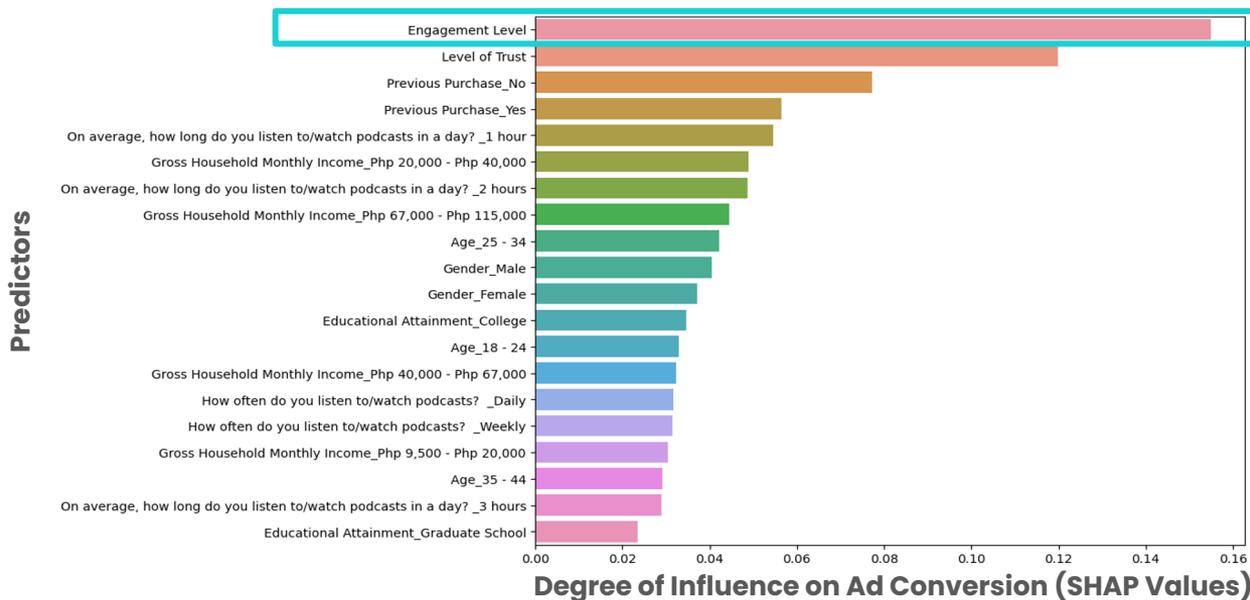| Trigger | Biases, opinions in the podcast shows |
| Action | Does his **own research about the credibility/biases** of the hosts |

MAXIMIZING AD EFFECTIVENESS

Why Do They Convert to Purchase a Product from Podcast Ads?

Predictors (top to bottom):
- Engagement Level
- Level of Trust
- Previous Purchase_No
- Previous Purchase_Yes
- On average, how long do you listen to/watch podcasts in a day? _1 hour
- Gross Household Monthly Income_Php 20,000 - Php 40,000
- On average, how long do you listen to/watch podcasts in a day? _2 hours
- Gross Household Monthly Income_Php 67,000 - Php 115,000
- Age_25 - 34
- Gender_Male
- Gender_Female
- Educational Attainment_College
- Age_18 - 24
- Gross Household Monthly Income_Php 40,000 - Php 67,000
- How often do you listen to/watch podcasts? _Daily
- How often do you listen to/watch podcasts? _Weekly
- Gross Household Monthly Income_Php 9,500 - Php 20,000
- Age_35 - 44
- On average, how long do you listen to/watch podcasts in a day? _3 hours
- Educational Attainment_Graduate School

Degree of Influence on Ad Conversion (SHAP Values)

Our machine learning predictor (SHAP) shows that **engagement level and trust level** are the <u>**strongest predictors**</u> **of podcast ads conversion to purchase**.

Why Do They Convert to Purchase a Product from Podcast Ads?

Predictors (y-axis, top to bottom):
- Engagement Level
- Level of Trust
- Previous Purchase_No
- Previous Purchase_Yes
- On average, how long do you listen to/watch podcasts in a day? _1 hour
- Gross Household Monthly Income_Php 20,000 - Php 40,000
- On average, how long do you listen to/watch podcasts in a day? _2 hours
- Gross Household Monthly Income_Php 67,000 - Php 115,000
- Age_25 - 34
- Gender_Male
- Gender_Female
- Educational Attainment_College
- Age_18 - 24
- Gross Household Monthly Income_Php 40,000 - Php 67,000
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- Gross Household Monthly Income_Php 9,500 - Php 20,000
- Age_35 - 44
- On average, how long do you listen to/watch podcasts in a day? _3 hours
- Educational Attainment_Graduate School

x-axis: **Degree of Influence on Ad Conversion (SHAP Values)** — 0.00, 0.02, 0.04, 0.06, 0.08, 0.10, 0.12, 0.14, 0.16

But, between the two, **engagement level is a better predictor of podcast ad conversion to purchase.**

Podcast Conversion to Purchase

While engagement is a strong predictor, trust also plays an important role in converting a listener to purchase a product.

Respondents said they wanted to hear the **host's <u>personal</u> experience or testimonials about the product** before considering purchasing it.

In addition, the product advertised has to be **relevant or related** to the show – that is, it is not "forced fit into like YT ads."

Why Personal Testimonial, Product Alignment, and Relevance Are Important: The Podcast Host as *Tropa*

Filipino audience views and expects their hosts to be their **kaibigan (friend) or *tropa.***

And, **in our sociocultural context, a *tropa* is expected/not expected** to:

Expected to	**<u>NOT</u> Expected to**
• Be very honest about his opinions. • Be genuinely concerned about you. • Give you friendly advice.	• Have "hidden agenda". • Take advantage of you. • Dictate on/manipulate you.

The Podcast Host as *Tropa*: Implications

This association implies that podcast hosts/shows are expected/not expected to:

Expected to	NOT Expected to
• Be very honest about their thoughts on the product being advertised. • Be genuine in recommending it, which means they must have experienced/used it themselves.	• Be *pilit*: the product being advertised is obviously force-fitted into the show. • Recommend it if they haven't experienced or used it.

In other words, the key to maximizing ad effectiveness is to **make it personal - be a *tropa*.**

Category	Percentage
Streaming Services (e.g. Spotify Premiuim)	25.1%
Food Services (e.g. restaurants, food promos)	23.1%
Songs and Movies	17.2%
Vlog Channels	17.1%
Books	12.9%
Recreation and Entertainment Places (e.g. amusement parks, game pl...	12.2%
Health Products (e.g. exercise equipment, supplements)	11.2%
Educational Services (e.g. SkillShare)	7.1%
Games	6.5%
Paid Seminars or Webinars	6.2%
Sleep Products (e.g. Pillows, Matresses)	3.4%
Podcast Merchandise	1.4%
Apparels	1.1%
Electronics	0.9%
Beauty Products	0.5%
Dating Applications	0.2%
Financial Services (e.g. GoTyme)	0.2%
Construction Equipment	0.1%
Consultant Services	0.1%
E-commerce (e.g. Lazada)	0.1%
Family Products	0.1%
Sports equipment	0.1%

Podcast Conversion to Purchase

Currently, only a limited range of products and services, such as streaming apps, food services, songs, movies, and vlog channels, advertised on podcasts result in conversions to purchases. This suggests that there are still **numerous opportunities for brands to advertise on podcasts.**

A Podcast Audience's Typical Journey: In a Nutshell

1. Entry Point

Trigger	Recommendation from family, friends, social media
Action	**Tries to listen** to the podcast recommended

2. Listening

Trigger	Before and after work, while commuting, driving, chores
Action	Listens to something **entertaining but also informative**

3. Engagement

Trigger	Personal interactions with the hosts, podcast community
Action	Listens AND also **follows, reacts, shares, comments, interacts**

4. Trust

Trigger	Biases, opinions in the podcast shows
Action	Does his **own research about the credibility/biases** of the hosts

5. Conversion

Trigger	**Tropa:** personal recommendations and not *pilit* ads
Action	**Purchases through the podcast ads**

SOME AD STRATEGIES TO CONSIDER
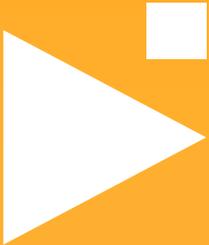
1. **Build relationships with podcasters to eventually build connections with the communities to enhance engagement.**

The survey reveals that Filipinos value personal connection and recommendations before subscribing to a podcast or trying out a new product. Thus, by first establishing a connection with podcasters who fit the brand's values, podcasters can influence their communities to support your brand more effectively.

2. **Prime your audiences before marketing to build trust.**

Place podcast ads within timeframes where audiences have had enough time to get into the *flow*, when they have eased into becoming receptive of any type of information. This opens opportunities for strategic analyses of ad placements.

SOME AD STRATEGIES TO CONSIDER

3. **Leverage emotional marketing.**

Since podcast episodes can run for over 30 minutes, there is more opportunity to **inject emotion into the narratives of the content and capture audience attention**. This also opens opportunities for advertisers to seamlessly blend their ads with the episode's content in a more subtle but effective way.

But the key to an effective emotional marketing is to align the narrative with the audience's specific **psychographic profile**.

WHO CAN BE?

Using machine learning and social listening, we found **eight (8) dominant psychographic profiles** based on level of trust and engagement:

Idealist Iñigos

Romantic Roxys

Resilient Ryans

Conscious Connies

Laidback Lances

Happy Hazels

Sophisticated Sophias

High-Level Harolds

The 8 Primary Psychographic Profiles of Filipino Podcast Listeners

Behavioral Profile	No. of Respondents	% Share
Idealist Iñigos	139	16.4
Romantic Roxys	121	14.2
Laidback Lances	68	8.0
Happy Hazels	44	5.2
Resilient Ryans	98	11.5
Conscious Connies	139	16.4
High-Level Harolds	120	14.1
Sophisticated Sophias	121	14.2
TOTAL	**850**	**100.0%**

Idealist Iñigos (High Engagement, High Trust)

Age & Class

- Gen Zs (24 and below) and Gen Ys (25 - 44) young professional males who belong to the middle to lower middle class
- Highly educated, with some having graduate degrees

Behavioral Attributes

- He is a young professional who is working on his current role for a few years now.
- He is very optimistic about the future.
- He has high expectations for himself not just in his career but also in his personal life.
- He believes that there is a formula for success in life; that is why he constantly seeks **personal development contents.**
- When his expectation falls short of reality, he seeks validation from others who share the same struggles.
- He is always open to share their ideals. As such, he **comments and interacts in podcast community very often.**

Preferences & Beliefs

- He believes that if he just works hard on following the formula for success, he can be happy in his professional and personal life.
- He believes that there is always the ideal, perfect answer to anything.
- This belief springs from the thought that **if he managed to reach where he is now through hard work, therefore, he can reach whatever he seeks.**

Typical Podcast Behavior

- Listens to podcast **daily for 1.5 hours.**
- Listens to: **Boiling Water**
- Frequently comments and interacts with the podcast social media community

Romantic Roxys (High Engagement, High Trust)

Age & Class
- Gen Zs (24 and below) and Gen Ys (25 - 44) young professional females who belong to the upper class
- Highly educated, with some having graduate degrees

Behavioral Attributes
- She is very passionate about the notion of perfect/ideal love.
- She is also very spiritual, always linking love with faith.
- As such, she highly values her own self worth, relationships, and, most importantly, her faith (Christianity).
- To enrich her beliefs on these areas, she oftentime seeks for **personal development contents.**
- Thus, she **often shares advice about the topic** in the podcast community.

Preferences & Beliefs
- She strongly believes in the existence of true love.
- She also thinks that true love is attained if it is aligned with God's will.

Typical Podcast Behavior
- Listens to podcast **daily for 1.5 hours.**
- Listens to: **Boiling Water, 10 Minutes with Jesus, Bo Sanchez Podcast, Victory Podcast**
- Frequently comments and interacts with the podcast social media community

Laidback Lances (High Engagement, Low Trust)

Age & Class	
	• Gen Ys (25 - 44) working men, typically from lower or middle class • Educated, with some having at least a high school diploma

Behavioral Attributes	
	• He is a young professional who is a few years into his current role. • He is a fun-loving, happy-go-lucky guy. • He enjoys cracking or laughing at jokes; as such, he is the type of guy you would expect to **share memes or funny contents** in social media**.** • He enjoys hanging out with friends after work to chill with - **_tropa._** • He prefers **"chill", comedy topics,** but can be interested in serious ones too such as politics.

Preferences & Beliefs	
	• He believes that the world has too much problems already, and it needs a little dose of fun. • He strongly believes in YOLO - you only live once. Thus, you need to enjoy every minute of life.

Typical Podcast Behavior	
	• Listens to podcast **daily for 1.5 hours.** • Listens to: **Ang Walang Kwentang Podcast, Bago Matulog, Koolpals, Punchline with Alex Calleja, Intellectwalwal** • Frequently shares the contents they find funny in their social media accounts

😊 Happy Hazels (High Engagement, Low Trust)

Age & Class

- Gen Ys (25 - 44) young female professionals,, typically from lower or middle class
- Highly educated, with some having graduate degrees

Behavioral Attributes

- She is a fun-loving, adventurous yuppy (*kalog*) who enjoys every moment of life.
- She enjoys pop culture, likely to be a Swiftie. Oftentimes, she shares about movies, plays, etc.
- Her adventurous nature sparks her curiosity to try out different things, and that translates into **diverse contents she consumes.**
- Typically, she's the star of the barkada because of her gregarious nature.
- She enjoys **commenting on memes and jokes.**
- She prefers **"chill", comedy topics,** but can be interested in **culture, lifestyle, horror.**

Preferences & Beliefs

- Like the Laidback Lances, she believes that the world has too much problems already, and it needs a little dose of fun and adventure.
- She strongly believes in YOLO - you only live once. Thus, you need to enjoy every minute of life.

Typical Podcast Behavior

- Listens to podcast **daily for 2 hours.**
- Listens to: **The Linya Linya Show, Lady Boses, HILAKBOT PINOY, Lagim, Philippine Campfire Stories**
- Frequently comments on fun or thrilling contents

Resilient Ryans (Low Engagement, High Trust)

Age & Class

- Gen Zs (24 and below) and Gen Ys (25 - 44) graduating students or young professional males who belong to the middle to lower middle class
- College graduates or students

Behavioral Attributes

- He is just starting his professional career, working for less than a year.
- He is optimistic and ambitious, but he is also anxious about his future.
- Despite these, he strives to **get on in life**, dealing with adversities.
- He seeks support and validation from others who are also undergoing the same struggles.
- He is also very willing to help and share his advice to others.
- Apart from comedy, which he listens to lighten things up, he oftentimes listens to **personal development** contents.

Preferences & Beliefs

- He believes that life constantly give lemons (problems, pressures, and hardships); thus, you just need to live and get on with it.
- This belief springs from his own experiences of dealing with various adversities early on in life.
- He believes that the best way to deal with those is to find a community to validate you.

Typical Podcast Behavior

- Listens to podcast **daily for 1.5 hours.**
- Listens to: **Yellow Space, Pampamilya Podcast**
- They usually react and share the inspirational posts from their favorite podcasts in the hope of inspiring others to be resilient.

Conscious Connies (Low Engagement, High Trust)

Age & Class	
	• Gen Ys (25 - 44) young female professionals„ typically from lower or middle class
	• Typically high school or college graduates

Behavioral Attributes	
	• She is a student or a young professional who is starting on her career.
	• She is very passionate to learn about anything related to wellness.
	• As such, she is very conscious about her well-being, such as her mental health, diet, among others.
	• She typically consumes **lifestyle and wellness contents.**
	• Her consciousness is springing from her insecurities about how others look at her.

Preferences & Beliefs	
	• She pursues wellness not to please anyone but out of self-love.
	• Nevertheless, she still seeks some external validation to affirm her consciousness.

Typical Podcast Behavior	
	• Listens to podcast **daily for 1.5 hours.**
	• Listens to: **The Donut Box, Yellow Space**
	• They usually follow and react and share contents from the podcasts they are subscribed to. However, they occasionally comment too.

High-Level Harolds (Low Engagement, Low Trust)

Age & Class	
	• Gen Xs and Baby Boomer (45 and above) male executives
	• Highly educated, with some having graduate degrees

Behavioral Attributes

- He is an experienced senior manager or executive in a company.
- He is very rational and objective when dealing with things; as such, he is skeptical by nature.
- He is focused on his career and family.
- As such, he is always busy and has very little time for leisure activities.
- In general, they prefer serious **political and cultural discourses**.
- But they have an inner *kulit* in them, as reflected by their occasional preference of comedy podcasts, provided that they are hosted by Gen Xs and Boomers too.

Preferences & Beliefs

- He believes that every time counts - that is, no time should be wasted.
- He believes that even while relaxing, he must get something valuable out of the activity.
- As such, he listens to podcast mainly **to enrich his ideas.**

Typical Podcast Behavior

- Listens to podcast **daily for 1 hour.**
- Listens to: **Facts First, The Howie Severino Podcast, Vox's Today, Explained, KoolPals**
- At best, they only react (Like button) to posts about the podcast they're listening to.

Sophisticated Sophias (Low Engagement, Low Trust)

Age & Class	
	- Gen Y (25 - 44), upper-class lady mom-preneurs
	- Highly educated, with some having graduate degrees

Behavioral Attributes

- She is a career woman, handling a lot of businesses at a young age while working from home and taking care of her kids.
- She is fashionable, with sophisticated air and tastes, as reflected in her social media posts about foreign trips, exotic foods, theater performances, among others - a *Tita of Manila* vibe.
- As such, she has high standards on everything, including the content she consumes.
- She would normally consume women's content focusing on **culture and personal development.**
- She is forward-looking and optimistic; at the same time, she is practical and resourceful.
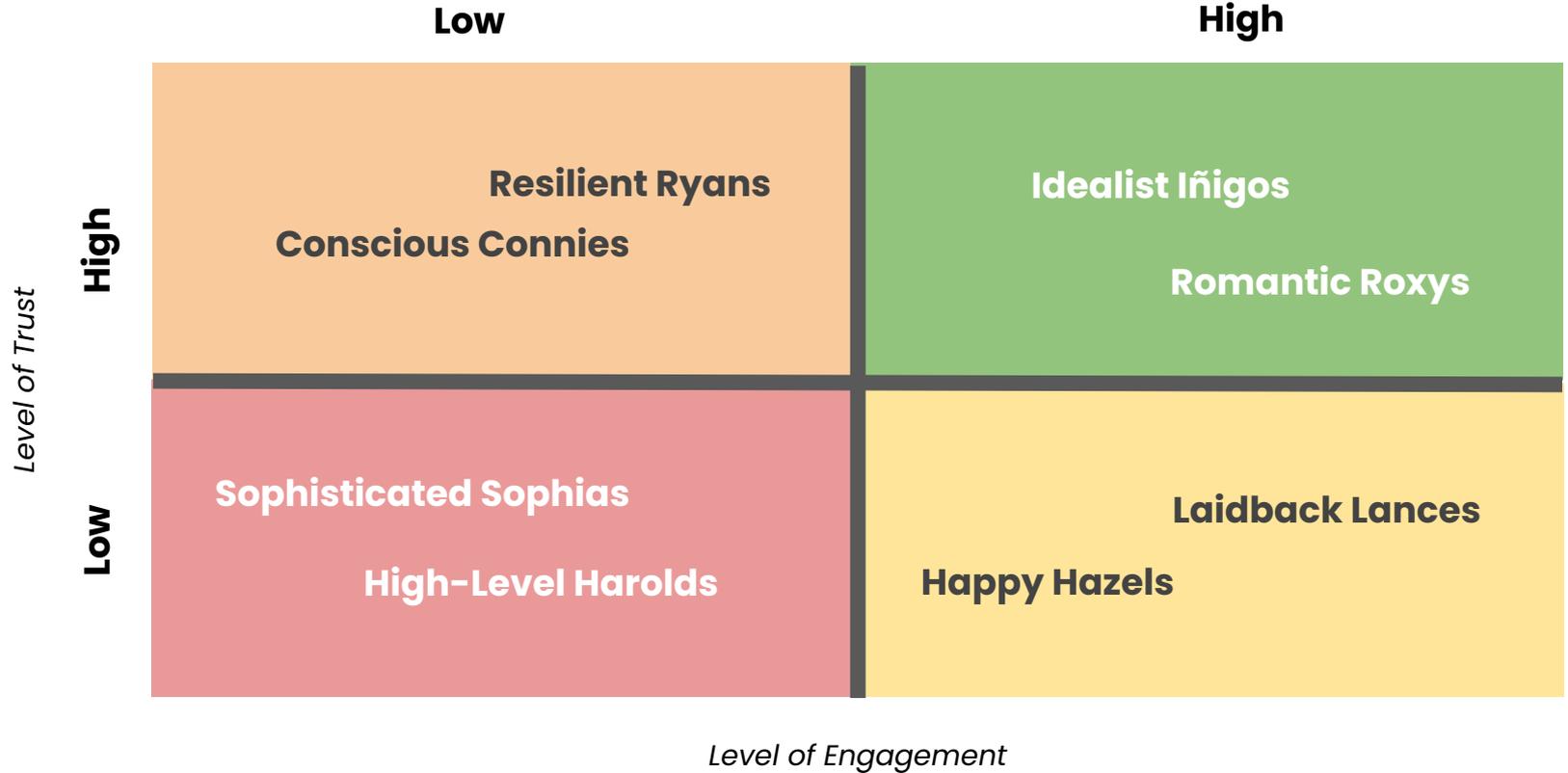
Preferences & Beliefs

- She believes that people should spend their time wisely by improving themselves.
- She believes that maintaining high standards in everything is important to achieve success in life.
- For her, people should always to achieve high standards even in small things.

Typical Podcast Behavior

- Listens to podcast **daily for 1 hour.**
- Listens to: **Paano Ba 'To**
- They only listen to podcasts, but depending on the topic, they may also react and comment.

The 8 Primary Psychographic Profiles of Filipino Podcast Listeners

Low   High

High

Resilient Ryans   **Idealist Iñigos**

Conscious Connies

                                              Romantic Roxys

Low

Sophisticated Sophias   **Laidback Lances**

High-Level Harolds   **Happy Hazels**

Level of Trust

Level of Engagement

Podcast Behavioral Profiles: Psychographic Battleground

	Rank	Behavioral Profile	Level of Engagement in Podcast	Level of Trust to Podcast	Likelihood of Converting via Podcast Ads
High	1	Idealist Iñigos	4.43	4.35	**3.76**
	2	Romantic Roxys	4.42	4.33	**3.64**
Moderate	3	Laidback Lances	4.16	2.89	**3.46**
	4	Happy Hazels	4.28	2.84	**3.45**
	5	Resilient Ryans	2.48	4.20	**3.21**
	6	Conscious Connies	2.37	4.22	**3.11**
Low	7	High-Level Harolds	2.44	2.82	**2.89**
	8	Sophisticated Sophias	2.29	2.86	**2.77**

The psychographic battleground suggests that **engagement level is more strongly correlated to likelihood of purchase** than trust level.
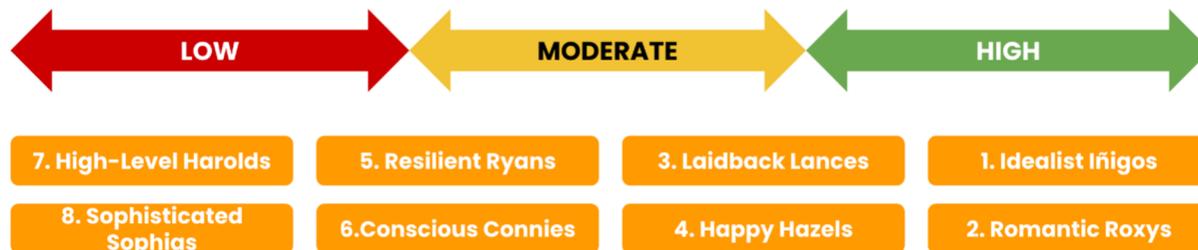
Engagement Levels

Level 1: Listener	Level 2: Follower	Level 3: Reactor	Level 4: Sharer	Level 5: Commentator	Level 6: Interactor
Sophisticated Sophias	Conscious Connies	Resilient Ryans High-Level Harolds	Laidback Lances	Happy Hazels	Idealist Iñigos Romantic Roxys

Being the most engaged, **Idealist Iñigos and Romantic Roxys** are the **easiest to convert to purchase.**

Conversion Likelihood

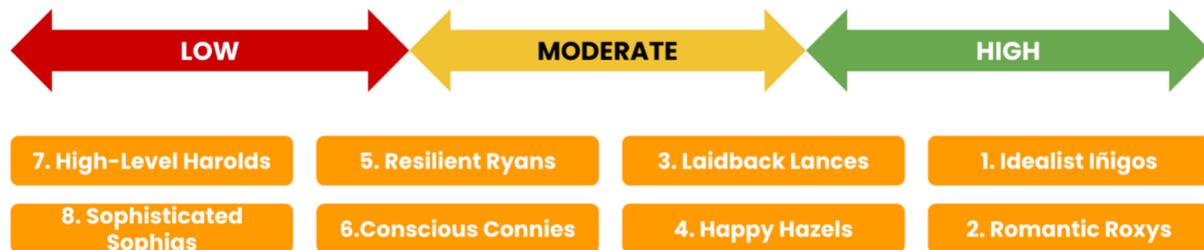**LOW** — **MODERATE** — **HIGH**

LOW	MODERATE	HIGH	
7. High-Level Harolds	5. Resilient Ryans	3. Laidback Lances	1. Idealist Iñigos
8. Sophisticated Sophias	6.Conscious Connies	4. Happy Hazels	2. Romantic Roxys

Engagement Levels

Level 1: Listener	Level 2: Follower	Level 3: Reactor	Level 4: Sharer	Level 5: Commentator	Level 6: Interactor
Sophisticated Sophias	Conscious Connies	Resilient Ryans High-Level Harolds	Laidback Lances	Happy Hazels	Idealist Iñigos Romantic Roxys

However, this does not mean that **High-Level Harolds and Sophisticated Sophias** cannot be converted to purchase. It only means that advertisers **have to do more to entice them** to purchase by **offering them stronger, more compelling reasons to buy.**

Conversion Likelihood

LOW ← → **MODERATE** ← → **HIGH** →

7. High-Level Harolds	5. Resilient Ryans	3. Laidback Lances	1. Idealist Iñigos
8. Sophisticated Sophias	6. Conscious Connies	4. Happy Hazels	2. Romantic Roxys

Engagement Levels

Level 1: Listener	Level 2: Follower	Level 3: Reactor	Level 4: Sharer	Level 5: Commentator	Level 6: Interactor
Sophisticated Sophias	Conscious Connies	Resilient Ryans High-Level Harolds	Laidback Lances	Happy Hazels	Idealist Iñigos Romantic Roxys

IMPLICATION: Advertisers have the opportunity to **convey a consistent core message** while **adapting various messaging approaches** for each show or genre of show clusters, aiming to **appeal to the psychographic personas that are most attracted to it.**

Conversion Likelihood

LOW	MODERATE	HIGH
7. High-Level Harolds	5. Resilient Ryans	3. Laidback Lances	1. Idealist Iñigos
8. Sophisticated Sophias	6.Conscious Connies	4. Happy Hazels	2. Romantic Roxys

AD FORMATS AND INNOVATIONS

SOME AD STRATEGIES TO CONSIDER
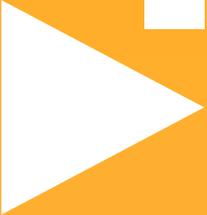
Experiment on ad formats depending on your objective.

Short, direct-to-the-point podcast ads may work well for brand reach and recognition. However, longer, more immersive, and possibly visual ads may work better to drive conversion as there is more opportunity to establish an emotional connection. These emotions are what triggers people to make decisions.

Main Podcast Ad Formats

	Advantages	**Disadvantages**
1. Live Host-Read Ad is read live by the podcast host on the episode	May create a smoother and more seamless advertisement as the ad is blended in the content by the host	Ad is permanent and depending on the content, may be less relevant in later times
2. Pre-Produced Host-Read Ad is pre-recorded by the podcast host, to be played during the episode	Maintains the connection between the host and the audience; can easily be inserted in the episode to strategically achieve objectives	Potentially disruptive to the listening experience of audiences since it is not part of the actual podcast content
3. Pre-Produced Ad is typically a voiceover ad inserted into the podcast	Can easily be inserted in the episode to strategically achieve objectives	Can feel less authentic as the ad is not delivered by the host

Sources: Kurt Kaufer (2023)

Podcast Ad Placements

	Advantages	Disadvantages

1. Pre-roll

Ads placed at the beginning or 25% into the podcast

Advantages: Better chances of audiences letting the ad play as it leads to the opening of the podcast; good for awareness and reach

Disadvantages: Recommended duration is only 30 seconds; relatively short to connect emotionally

2. Mid-roll

Ads placed in the middle of the podcast

Advantages: Best ad placement as it is less likely for audiences to skip through; recommended length is about 60 seconds, more opportunity to connect with the audience better

Disadvantages: Relatively disruptive to the listening experience of audiences

3. Post-roll

Ads placed in the end or 50% up from the end of the podcast

Advantages: Opportunity to market in between episodes for binge listeners

Disadvantages: Likeliest to be skipped by single episode enjoyers

Podcast Ad Delivery

	Advantages	**Disadvantages**

1. Baked-in

Ads permanently incorporated into the podcast's audio file

Has potential to continuously drive conversion due to the ads still being present even in older episodes and the same call to action still holds

Not recommended for advertising seasonal offers

2. Dynamic Insertion

Ads are separate files from the podcast's audio files

Ads can easily be changed and targeted towards specific audiences depending on the advertiser's objectives

Ads may feel less authentic to audiences as these are typically pre-recorded and delivered by someone apart from the podcast host. The disconnect may impact engagement and conversion.

Sources: Acast, Kurt Kaufer (2017)

SOME AD STRATEGIES TO CONSIDER

Mid-roll, host-read, podcast ads

Meeting the audience where they are and maintaining the connection with them is key. Based on the observed behaviors of the respondents, experiment on mid-roll, host-read ads to ensure they are engaged and connected to the host before advertising. We recommend trying baked-in formats for timeless promotions, dynamically inserted ones for more seasonal or short-term campaigns. Moreover, keeping ads within the recommended durations of 30 to 60 seconds is highly recommended to avoid the ads from feeling disruptive.

SOME AD STRATEGIES TO CONSIDER

Make ads feel personal and authentic

Conversion is heavily reliant on positive reviews and personal recommendations. Thus, allowing podcast hosts to cover the following things in 30 to 60 seconds will be desirable:
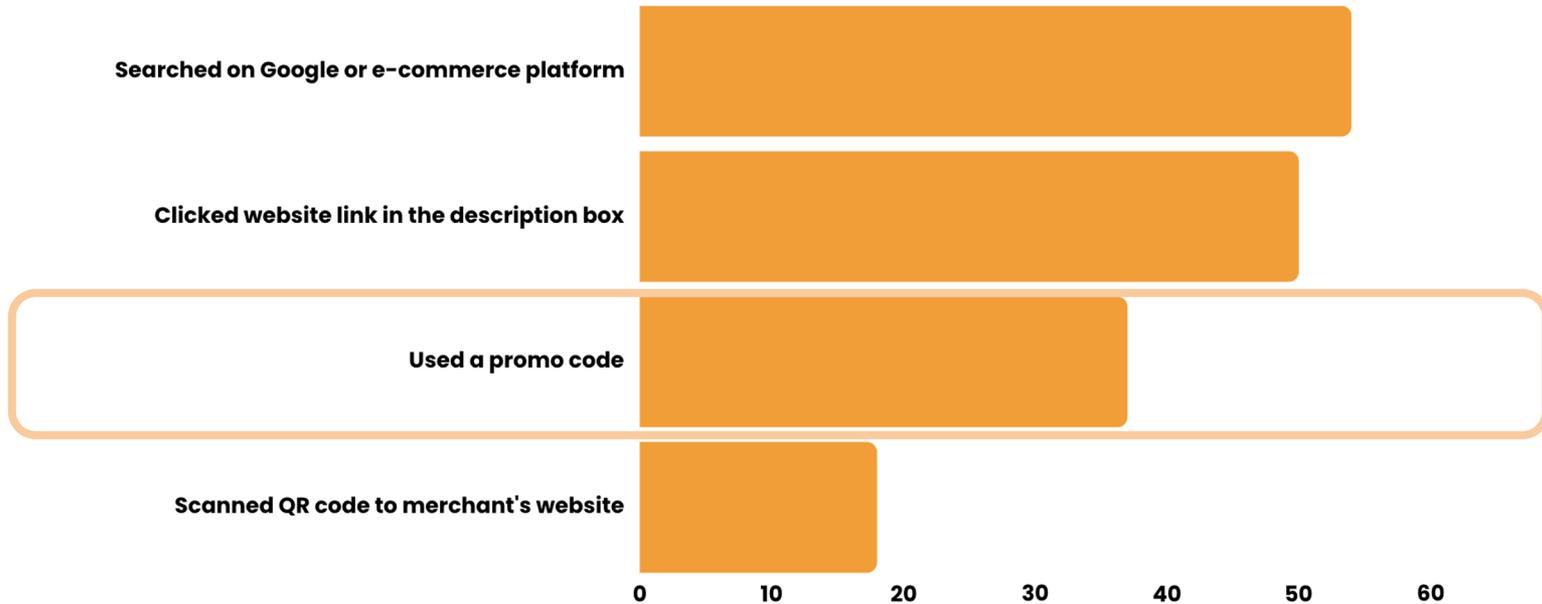
- What the product or brand is
- What is it for
- Testimonials of the host of the brand
- A clear call to action
- If applicable, a discount code to incentivize audiences

Other Considerations: Purchasing Touch Point

Searched on Google or e-commerce platform

Clicked website link in the description box

Used a promo code

Scanned QR code to merchant's website
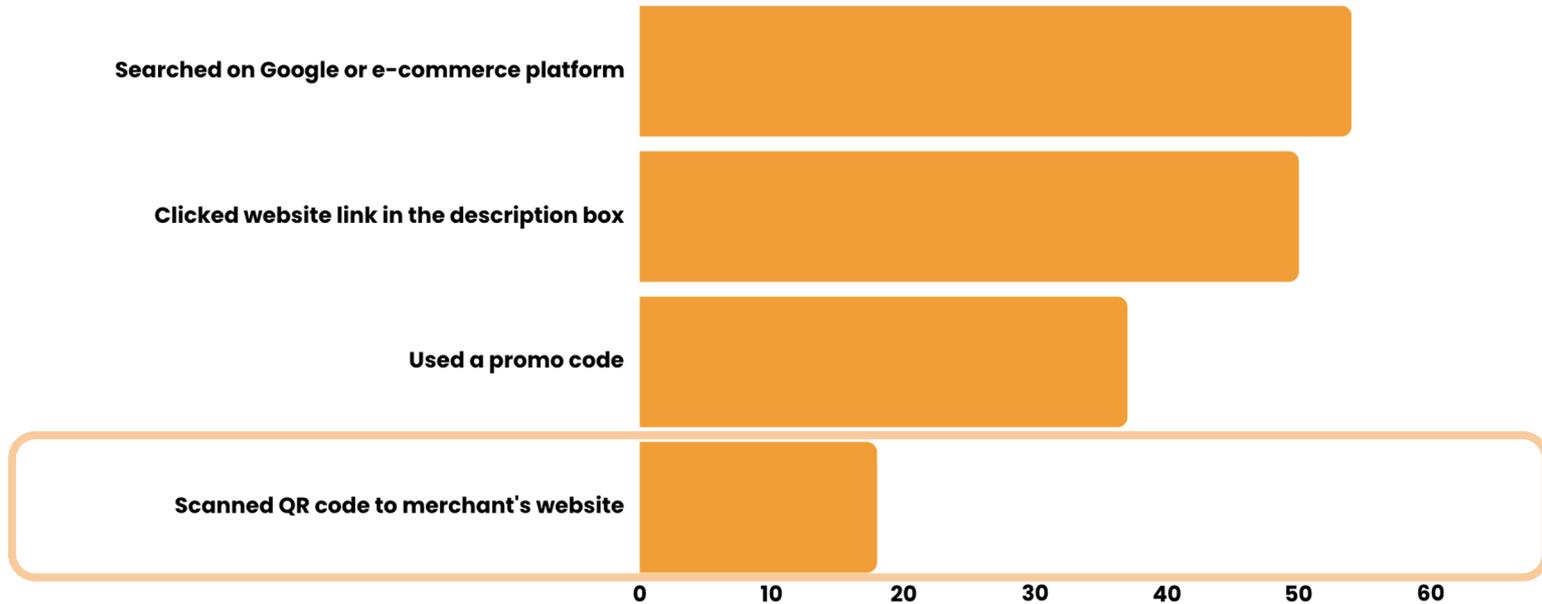
0   10   20   30   40   50   60
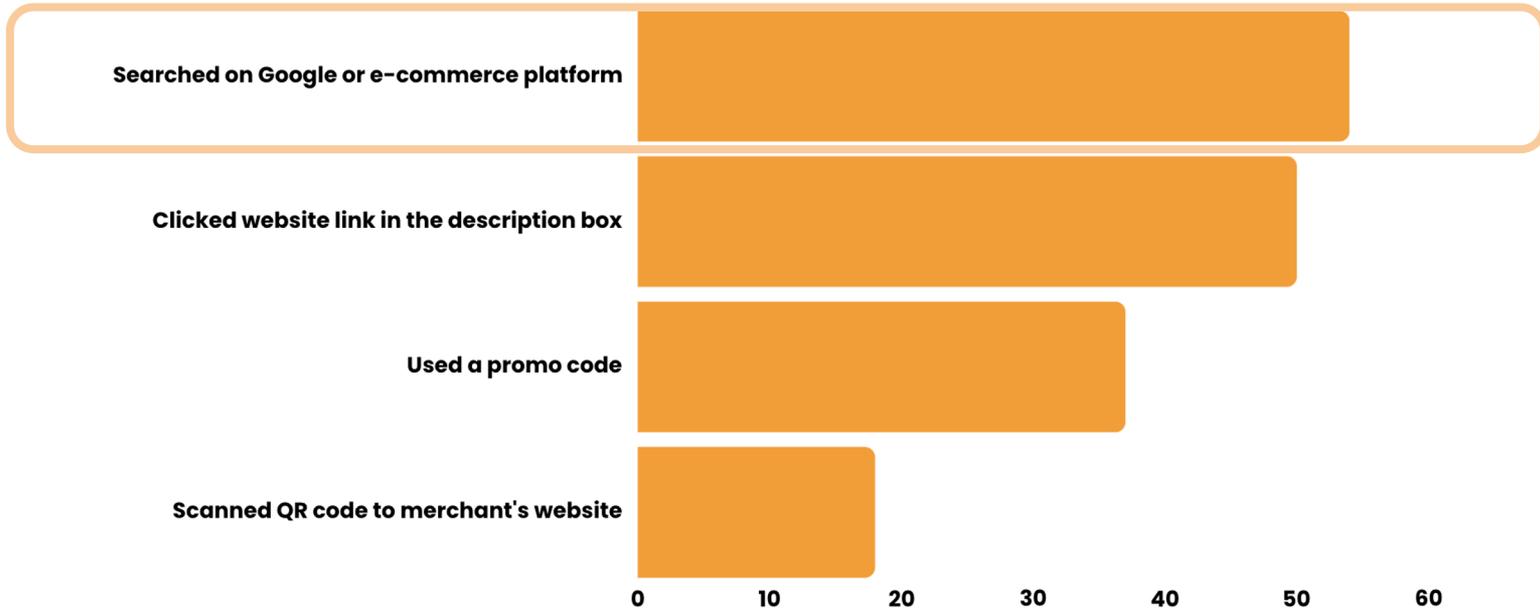
Among podcast subscribers who have tried buying something off podcast ads, the leading touch point is searching for the product online to purchase. This supports the observation that while podcast listeners trust the recommendations and reviews of the podcast hosts, they still need to **do their own research** to cement their decision.

Other Considerations: Purchasing Touch Point

Searched on Google or e-commerce platform

Clicked website link in the description box

Used a promo code

Scanned QR code to merchant's website

0   10   20   30   40   50   60

The pattern above shows that while the top two touch points drive the interest of audiences in the product, the availability of promo codes may help in convincing them to buy due to the added incentive (saving).

Other Considerations: Purchasing Touch Point

Searched on Google or e-commerce platform

Clicked website link in the description box

Used a promo code

Scanned QR code to merchant's website

0   10   20   30   40   50   60

Although visual, this also suggests that QR codes are less effective to direct traffic to websites or e-commerce platforms. QR scanning would necessitate a second device for scanning apart from the device you are watching on.

THE FUTURE OF PODCAST IN PH

THE FUTURE OF PODCAST

The future growth of podcast will be shaped by **four macro factors:**

Global Podcasting Trends

PH's Economic Growth
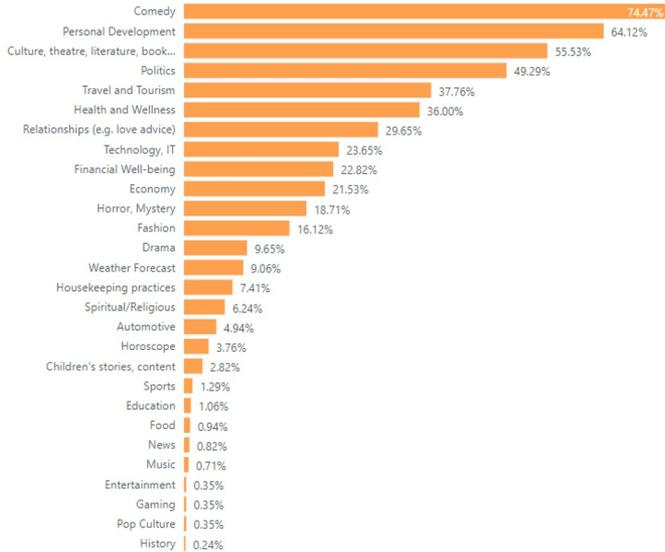
PH's Young Population

PH's Digital Penetration

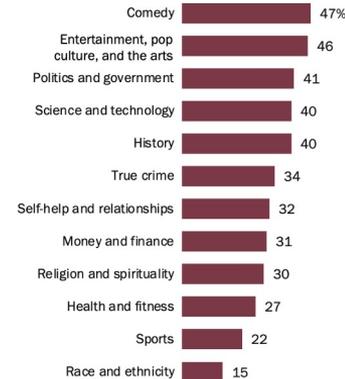# Global Podcast Trend: Podcasts as Productivity Enablers

PH

Top Contents Consumed.

Category	%
Comedy	74.47%
Personal Development	64.12%
Culture, theatre, literature, book...	55.53%
Politics	49.29%
Travel and Tourism	37.76%
Health and Wellness	36.00%
Relationships (e.g. love advice)	29.65%
Technology, IT	23.65%
Financial Well-being	22.82%
Economy	21.53%
Horror, Mystery	18.71%
Fashion	16.12%
Drama	9.65%
Weather Forecast	9.06%
Housekeeping practices	7.41%
Spiritual/Religious	6.24%
Automotive	4.94%
Horoscope	3.76%
Children's stories, content	2.82%
Sports	1.29%
Education	1.06%
Food	0.94%
News	0.82%
Music	0.71%
Entertainment	0.35%
Gaming	0.35%
Pop Culture	0.35%
History	0.24%

US – Global

Comedy and entertainment among most common podcast topics for listeners

% of U.S. podcast listeners who say they regularly listen to podcasts about ...

Topic	%
Comedy	47%
Entertainment, pop culture, and the arts	46
Politics and government	41
Science and technology	40
History	40
True crime	34
Self-help and relationships	32
Money and finance	31
Religion and spirituality	30
Health and fitness	27
Sports	22
Race and ethnicity	15

Note: "Podcast listeners" in this report are those who have listened to a podcast in the past 12 months.
Source: Survey of U.S. adults conducted Dec. 5-11, 2022.
"Podcasts as a Source of News and Information"

PEW RESEARCH CENTER

6. Comedy was the crowning category.

In 2023, Comedy outperformed all other podcast categories, representing 26% of total hours streamed.[5] Users also embraced more casual and "just for fun" content, too. Celebrity buzz was a big draw, thanks to cultural phenomena like the Vanderpump Rules scandal and the Met Gala. In 2023, content in the Celebrity category grew by +60%.[6]

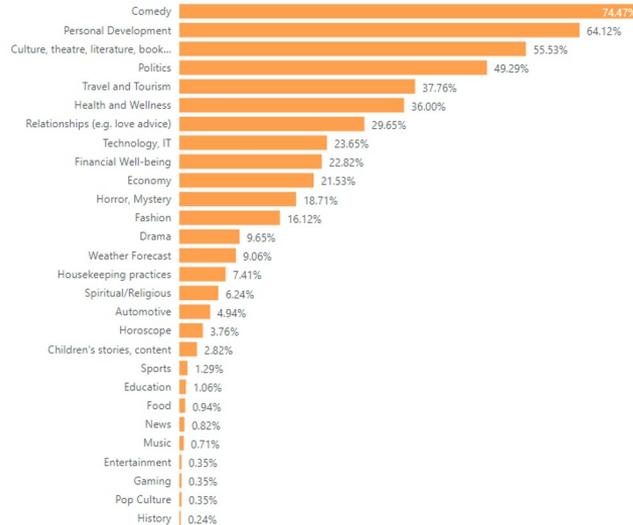Source: Spotify 2023 Wrapped for Advertisers: Top 10 trends and takeaways

Among podcast listeners, there is a tendency to **gravitate towards something light first**, such as comedy podcasts, **before delving into something useful or informative.**

# Global Podcast Trend: Podcasts as Productivity Enablers

PH

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Education	1.06%
Food	0.94%
News	0.82%
Music	0.71%
Entertainment	0.35%
Gaming	0.35%
Pop Culture	0.35%
History	0.24%

The trends observed in both markets, combined with the need for something engaging and somewhat informative in a podcast for it to be effective, suggest an interesting behavior: **listeners first need something light to <u>prime their minds</u> before 1) "learning" anything from what they are listening to or 2) before getting into the drive to learn something**. Depending on their psychographics, different people also differ in the things they want to take away from the podcasts they listen to – self-help, moral of a story, an uplifting quote, technical information, etc.

Global Podcast Trend: Podcasts as Productivity Enablers

Mihaly Csikszentmihalyi's (1990) Flow State Diagram
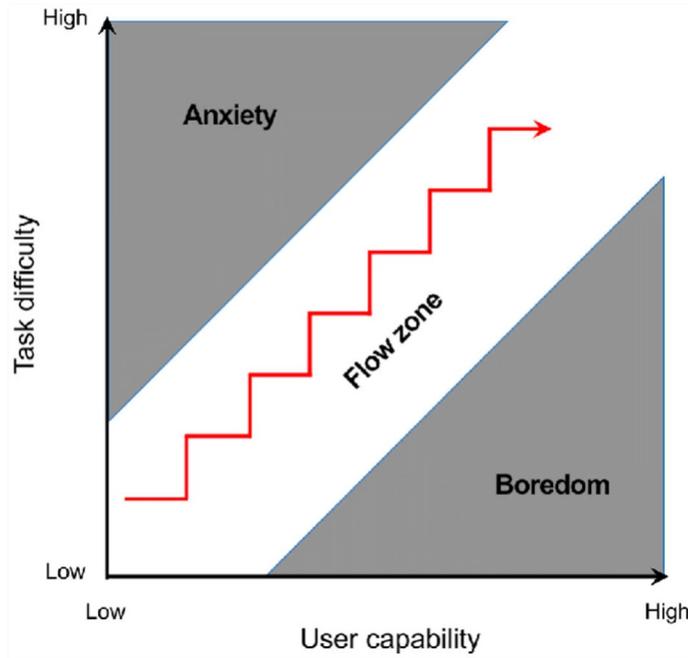
Additionally, those who prefer having podcasts playing in the background as they attend to something else need sound to get them into the Flow state and become productive.

Essentially, even when listeners tune in to podcasts for entertainment, learning, or just "mindlessness", **people want to feel that any time they spend is productive or rewarding.**

Such insight opens opportunities for more creative marketing strategies.

Global Podcast Trend:
Video Podcasts and Multi-format Ad Campaigns

Video activity grew on Spotify.

Time spent with video content on Spotify increased 48% YoY, mostly driven by video podcasts. Gen Zs are leading this growth, spending 136% more time with video on Spotify YoY.[11]

In 2023, variety was the spice of life— and ad campaigns.

A multi-format approach served up success for advertisers hoping to raise awareness. In 2023, all Spotify ad formats saw a positive lift in driving brand awareness and ad recall for advertisers, led by Video Takeover, Sponsored Sessions, and Audio Ad formats.[12]

Source: Spotify 2023 Wrapped for Advertisers: Top 10 trends and takeaways

From these observed trends by Spotify, there is also **growing potential in leveraging videos** not only in capturing audiences, increasing brand awareness, and ad recalls, but also in driving conversions.

Since our survey reveals the need for personal connection and personal recommendations to drive conversion, there is an opportunity to use video ads creatively and strategically to **paint the experience** of using the product and entice listeners. This shall be especially useful in marketing "lifestyle goods".

PH Economic Growth

The Philippine Economy (% growth of GDP) and
Net Additional Income from Abroad (as % of GDP)
1950 - 2030

6.5 % ave. growth in 10 Yrs

~5% average annual growth in 70 Years

With Net Additional Income from Abroad

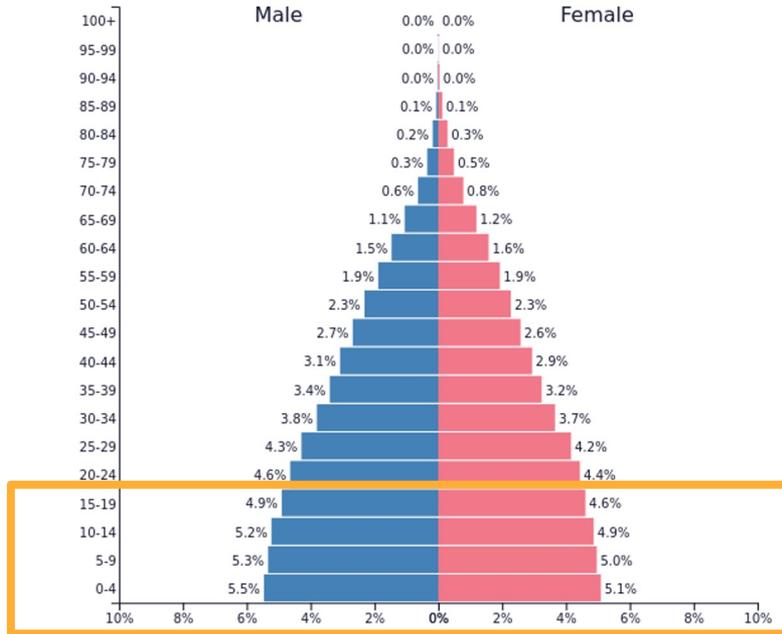Without Net Additional Income from Abroad
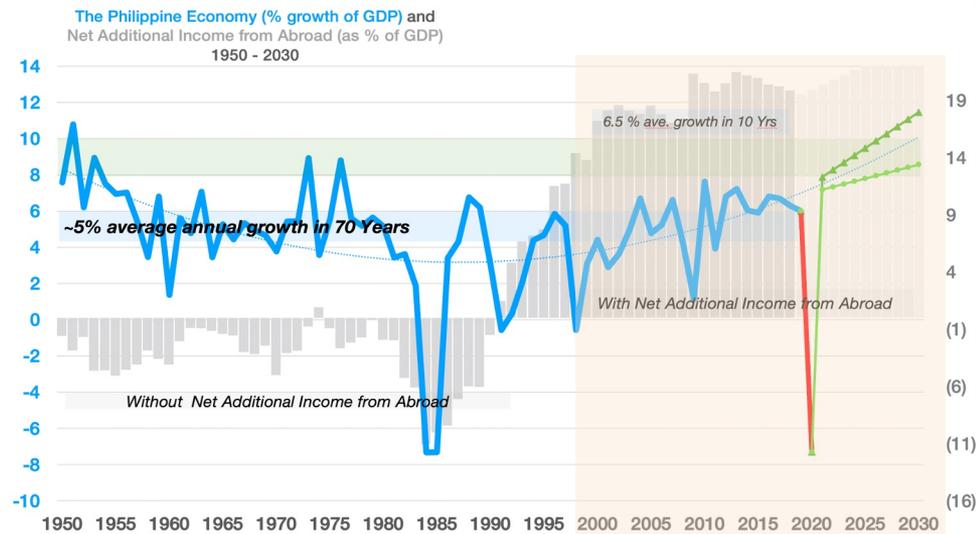
Source: DTI E-Commerce Roadmap 2022

The country's continuous accelerated growth will result in **greater affluence for Filipinos in the next 5 to 10 years**, bringing us closer to the goal set in Ambisyon 2040 of becoming a **middle-class society by 2040.**

As affluence becomes more strongly felt across classes, we can expect **greater demand for lifestyle services such as podcasts.**

On the flip side, however, **it will increase the challenge of podcasters to keep their audience engaged,** as greater affluence would lead to greater economic activity, making potential audiences busier.

PH Young Population

Male — Female

Age	Male	Female
100+	0.0%	0.0%
95-99	0.0%	0.0%
90-94	0.0%	0.0%
85-89	0.1%	0.1%
80-84	0.2%	0.3%
75-79	0.3%	0.5%
70-74	0.6%	0.8%
65-69	1.1%	1.2%
60-64	1.5%	1.6%
55-59	1.9%	1.9%
50-54	2.3%	2.3%
45-49	2.7%	2.6%
40-44	3.1%	2.9%
35-39	3.4%	3.2%
30-34	3.8%	3.7%
25-29	4.3%	4.2%
20-24	4.6%	4.4%
15-19	4.9%	4.6%
10-14	5.2%	4.9%
5-9	5.3%	5.0%
0-4	5.5%	5.1%

PopulationPyramid.net

Philippines - 2020
Population: 112,190,977

Source: PSA (2020)

Our country's young population, especially the **rise of Generation Alphas (comprising 40.5% of the population as of 2020)**, will present an opportunity for the podcast industry. This generation is more digitally integrated compared to Gen Zs; thus, attracting them to podcasts will be easier.

This generation is also characterized by a **greater consciousness of political, social, and inclusivity issues, particularly gender equality and environment.** Thus, podcast content creators must be more sensitive in dealing with these.

PH Digital Penetration

No. of Internet Users in PH (in millions): 2018 – 2028
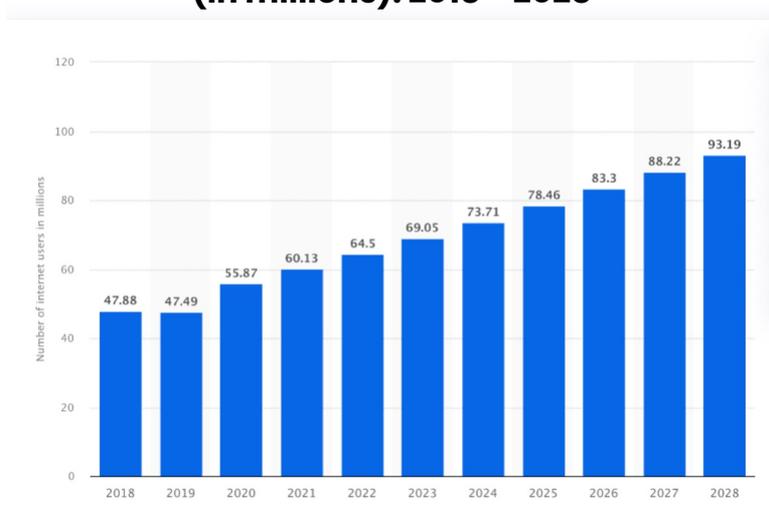
Source: Statista (2023)

Finally, the growing digital penetration in our country, exemplified by the increasing number of internet users in the Philippines, is poised to **extend the reach of podcasts beyond urban centers to rural regions.**

THE FUTURE OF PODCAST

In short...

Global Podcasting Trends

will lead to

Podcast as a Dominant Media Platform

THE FUTURE OF PODCAST

In short...

PH's Economic Growth

will lead to

Increased Demand for Lifestyle Services

THE FUTURE OF PODCAST

In short...

PH's Young Population

will lead to

Further Diversification in Content Tastes

THE FUTURE OF PODCAST

In short...

PH's Digital
Penetration

will
lead to

Expansion of
Podcast Market
in PH Regions

THE FUTURE OF PODCAST

Podcast as a Dominant Media Platform

Increased Demand for Lifestyle Services

Further Diversification in Content Tastes

Expansion of Podcast Market in Regions

SEIZING THE FUTURE: CALLS TO ACTION

CALLS TO ACTION

1 **Reach the mobile, on-the-go Millenials through podcast advertisement**

The growth in podcast listenership globally and locally, combined with global, economic, and demographic trends, suggests that **podcasts will become a dominant media in the next half-decade**. Moreover, unlike traditional media, **podcasts, by nature, enable a more personal relationship with the target audience.**

Given these trends, podcast media offers an opportunity for advertisers not only to **expand their reach among Millenials and Gen Zs** but also to **build brand loyalty that is more behavioral than transactional.** Thus, investing in podcast advertisements is in the advertisers' interest.

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2 **Build personal rapport with the audience through the host- be a *tropa*.**

As a media platform uniquely capable of going personal, podcast requires more than just selling. To keep the engagement and trust of the audience, podcast advertisers need to do what content creators also do: they need to **keep personal interactions with the target audience consistently.**

The starting point to do this is to **build a good relationship with the podcast hosts themselves.** The **objective has to be to make the hosts recommend your product,** as personal recommendations from the host are the strongest predictors of advertisement conversion in the medium.

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3 **Adapt different messaging strategies.**

Aside from fostering strong relationships, it's crucial for advertisers to ensure subtlety in their advertisements. Filipino listeners often perceive podcasts as intimate companions, and any hint of forcibly inserting (i.e., *pilit*) product placements can be off-putting.

To accomplish this, we suggest that advertisers contemplate employing diverse messaging strategies tailored to each podcast show within a campaign, catering to the psychographic personas most drawn to a particular show.

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4

Consider incorporating storytelling.

In relation to No. 3, we also recommend that advertisers consider incorporating storytelling in their messaging strategies. Narratives resonate to human behavior, which can profoundly impact engagement, leading to conversion to purchase.

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5 **Explore on different advertising formats to achieve subtlety.**

In addition, advertisers should test out different advertisement formats and determine **which is least disruptive and most subtle among them** (i.e., least *pilit*).

Based on our findings, the **mid-roll, host-read ads seem ideal for Filipino audiences**, but advertisers can test out other alternatives too. To make it more natural, advertisers may consider **sponsoring an entire episode** so that the whole discussion will revolve around the product. That will keep the discussion natural, friendly, and personal. All of these will depend on how well the advertisers understand the psychographics of their target audience.

ABOUT
THE FOURTH WALL

The Fourth Wall is a research and analysis firm that **simplifies complex people information through the Philippines' sociocultural lens.** It offers clear insights and practical, actionable solutions tailored to the Philippines.

Since 2018, its work has been instrumental in transforming and growing organizations in the Philippines. It helped businesses and products break into markets, aided organizations in understanding and developing their workforce, created policies for various government and NGO entities, and provided valuable insights to media.

Understand your data better and
know more about your target audience
through the Filipino lens.

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