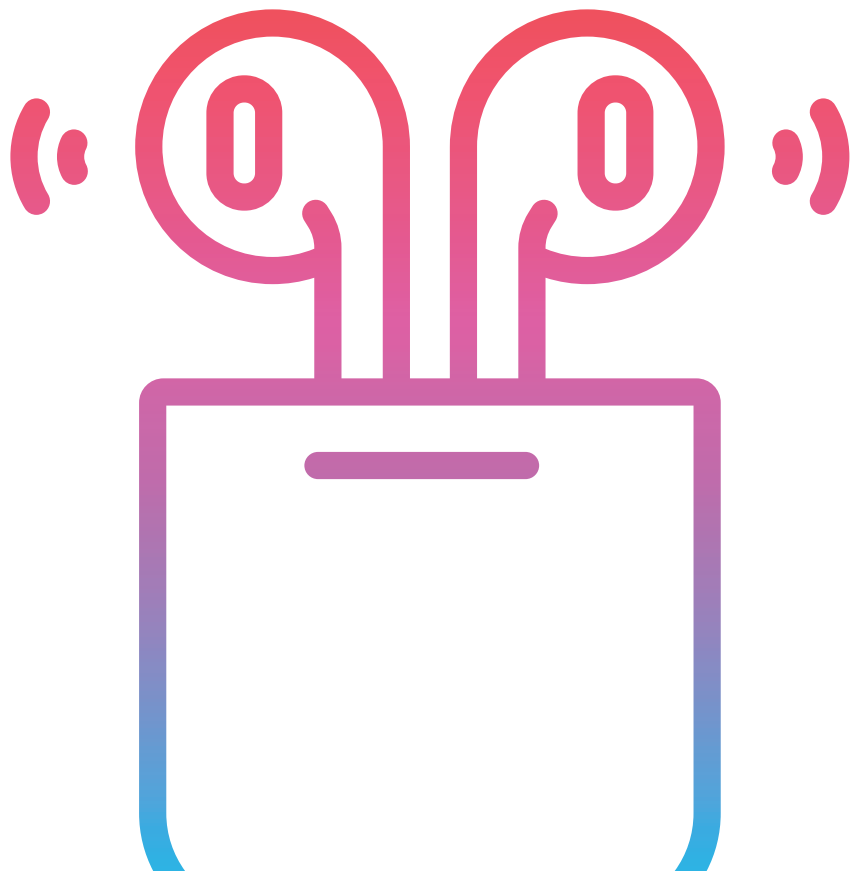


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**Audio is the  
brand-building  
channel you  
didn't know  
you had**

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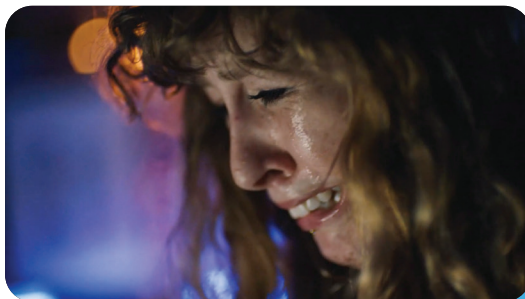
# What do each of these videos have in common?

Drake crying at the Nike Headquarters



Screenshot: Drake - Laugh Now, Cry Later

An emotional spot from a toilet roll brand



Screenshot: Kruger Products - Unapologetically Human

A 7-minute short film about working from home from a 2 trillion-dollar brand



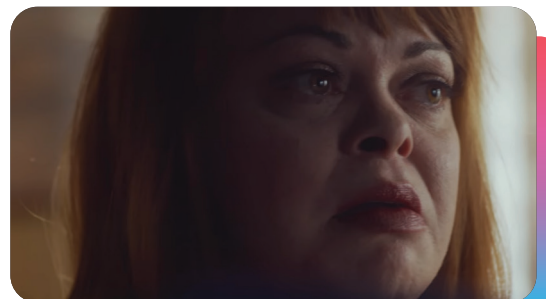
Screenshot: Apple - The Whole Working-From-Home Thing

Arlene's Big Leap into Aviation Gin



Screenshot: Aviation Gin - Arlene's Big Leap

Luka Magnotta's big lie



Screenshot: Netflix - Don't F'ck With Cats

An ad for a truck revived, more than 25 years after OJ made it infamous



Screenshot: Ford - 2021 Bronco Family: Built Wild

A COVID-inspired rap song from a grocery store about staying shopping cart distance away from everyone else



Screenshot: No Frills - A Cart Apart

All are examples of exceptional and innovative stories for brands that generated buzz and interest - in popular culture and the advertising industry.

From Esquire [covering](#) Netflix's true crime documentary to Drake's [100M+ views](#) of *Laugh Now Cry Later*, Business Insider [reporting](#) on Ryan Reynold's tribute to a 21-year old born on February 29th, 1934, to the Daily Hive, a Vancouver blog [calling](#) No Frills' *A Cart Apart*, "*half summer banger, half PSA*", each video listed above was *noticed*. It was talked about by consumers and ad folks, alike.

Another commonality is that each ranked in the top 20% of Brainsights' Max Connection scores in 2020.

That means these videos outranked 80% of all other videos tested by Brainsights this year for Max Connection.

We call this Max Connection score **Emotional Strength**.

So what's happening?

# Max Connection, Emotional Strength and the Power of Story

Brainsights' Connection scores are derived largely from gamma wave activity picked up by the electrodes on our brainwave readers that we use for data collection.

Brain waves occur naturally, but our technology picks up when wave amplitudes change in response to stimuli. Analyzing moments in media and content stimuli when amplitude changes provides us with data as to what the consumer *resonates* with - or not - at a deep, neural level. Max Connection is the observed peak in amplitude for an individual second during a given time bound experience (like a video, or an audio segment).

To illustrate, let's consider Apple's *The Whole Working From Home Thing*, which was widely covered by the advertising trade and consumer press, touching off both positive and negative reactions to the WFH situation. It's a sequel to Apple's *The Underdogs* spot from 2019, which was considered one of the better ads of last year.

*The Whole Working From Home Thing* is a 7-minute short film that is an ode to the COVID lockdown WFH experience.



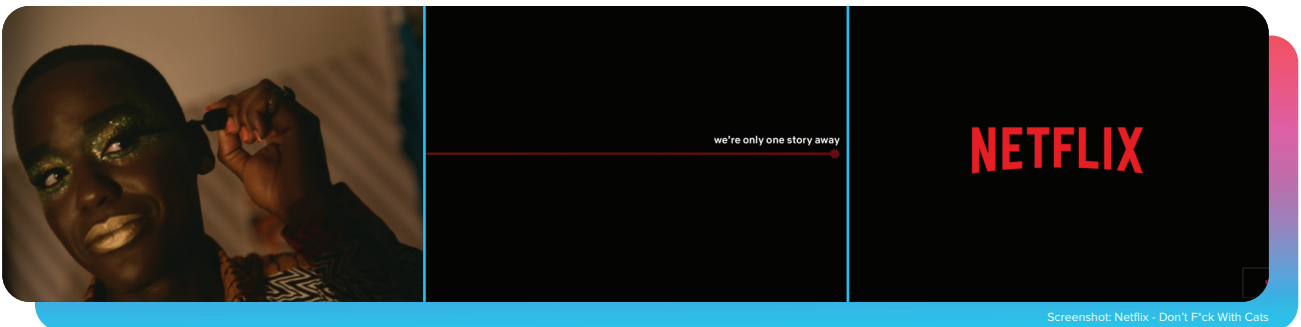
After a frenzied story of a team grappling with the pressures and quirks of working from home, the Max Connection moment comes towards the end of the spot when the lead characters asks: “*Is everyone wearing pants?*”, which is followed by an older gentleman looking down in a subtle admission of guilt.

Jason Atem, Inc's tech columnist points out this exact moment in his analysis of the spot, “*Near the end comes the question every remote work can relate to: “Is everyone wearing pants?”*”

And he's nailed it - the fact is, everyone CAN relate to it, which is the reason Max Connection happens at that precise moment (or, rather, the moment precisely following that when the older gentleman looks down, suggesting that he is not actually wearing pants). It's this moment that conveys a shared experience of WFH that pushes the Connection metric way up to its peak levels for the spot.

This moment puts Apple's Emotional Strength score (ranked by the performance of Max Connection) in the 92nd percentile; the result of a well-crafted story with great relevance to a large number of people. That the very next moment for Apple was a black screen with Apple at Work on it meant that they capitalized on the best possible time to deliver their key branding moment. It's content like this, crafted deliberately, that has helped to build the 2nd most valuable brand in the world.

But Max Connection moments aren't always payoff moments - they can also happen mid-content. For example, take Netflix's recent global campaign, *One Story Away*. The Max Connection moment happened at second 52 of a 1:55 spot when the voiceover says "*Or learn to love yourself*", as Eric from *Sex Education* - an openly gay, Black teenaged boy played by Ncuti Gatwa - stands in front of a mirror applying makeup.



In this instance, the Max Connection moment is driven by a brand asset - for Netflix, its show content and characters - used in a different way to tell a story (in this case as an example to support the *One Story Away* positioning). Of course, it's also a message that many people connect with, relate to, and are inspired by.

What Max Connection is telling us is just how powerful an emotional resonance the spot elicits; hence the name Emotional Strength. And this is important, as decisions and behaviours are driven in large part by a person's emotions, so ads should strive to hit these peaks.

And it's no surprise that longer videos have more success in Emotional Strength. In fact, the average length of a video in the top quintile of Emotional Strength is 1.75-2.5X as long as the average length of all other ads and content (the other 80 percent).

With more time to build the story, there's more time to build towards an emotional crescendo. Shorter ads (6s, 15s) tend to fail on this score - there simply isn't enough time to build the story to that peak. Indeed, the average length of bottom quintile ads in Max Connection scores is 24 seconds, which is on average about 75-90s shorter than the average length of an ad in the top quintile of Max Connection.

And this makes intuitive sense - longer form video has historically been understood to be best in creating deep emotional connections with consumers - think feature films and TV shows.

It's largely for this reason of emotional connection that when we think of the best medium for brand and storytelling we probably think about video. According to Binet and Field, it's the most effective channel for conveying emotion: *"Any kind of involvement increases the effectiveness of communications. The more emotionally involved, they are the more effective communications tend to be."*

# The Power of Audio in Delivering Emotional Connection

But if Max Connection (Emotional Strength) is a prerequisite for strong brand storytelling, as a measure for eliciting powerful emotional response from audiences, then audio is gaining ground.

Recent Brainsights research reveals that Audio can rival video in delivering Max Connection.

Before sharing the findings from research conducted with Canadian Broadcast Sales, it's worthwhile understanding the role Audio has played in the media mix.

The recent history of Audio - and more specifically Radio - has been as a tactical medium, focused on promotions, pricing, LTOs and other activations. But the earliest days of broadcast radio were characterized by branded storytelling - the Soap Operas of the 1930s were sponsored (and even produced) by large soap manufacturers (P&G, Lever Brothers, Palmolive). In other words, long form storytelling tailored to the audience was a big part of Radio's early days.

The role of radio changed as consumers shifted to the new medium of television when it arrived, not unlike the shift towards interactive media of the last few decades. Established radio shows and their stories moved from radio to television and advertisers followed. Private radio stations emerged soon after when high-quality FM signals were introduced, allowing radio stations to focus on music, as rock and roll and youth culture emerged in the 50s and 60s. The invention of car radios and transistors took radio from a family experience to a personal medium.

Fast forward to today and the digitization and democratization of media and production has led to an explosion of quality audio content, re-writing the rules of programming, planning, buying and selling. This disruption forces us to reconsider the role audio can play in current advertising and media plans.

And data collected from the brains of Canadians as they consume video and audio content confirms this very point.



In research commissioned by Canadian Broadcast Sales in February 2020, Brainsights measured the brain wave activity of 100 Canadian adults as they consumed multimedia content.

Two separate modules were set up - one was an audio station and the other was a video station. At the audio station, participants consumed a range of audio content, from radio ads to show clips. Similarly, for the video station.

Nine brands across eight industries were studied. There were 24 ads - half were audio and half were video. What was novel about this study is that each brand studied had both a TV ad and a radio ad from the same campaign.

All participants consumed both audio and video content. Half of the participants watched the video content first before moving to the audio station and listening to the audio content. The other half consumed the audio content first, before moving to the video module to watch the videos.

Following all data collection, data were aggregated across all sessions so that both audio and video content could be analyzed together, and isolated for additional insights.

## Findings

- Overall, Radio spots generated greater Emotional Strength scores vs. their corresponding TV spots.
- On average Radio reached emotional peaks (Max Connection scores) that were +23% higher than TV's emotional peaks.
- These higher emotional peaks on Radio happened across various audience segments including male, female, under 35 and 35+ audiences.

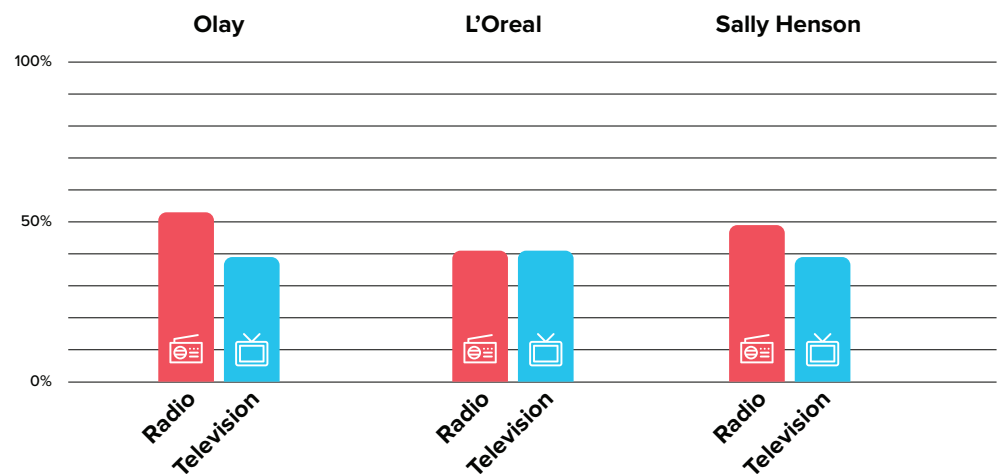


# Case Study: Beauty Category

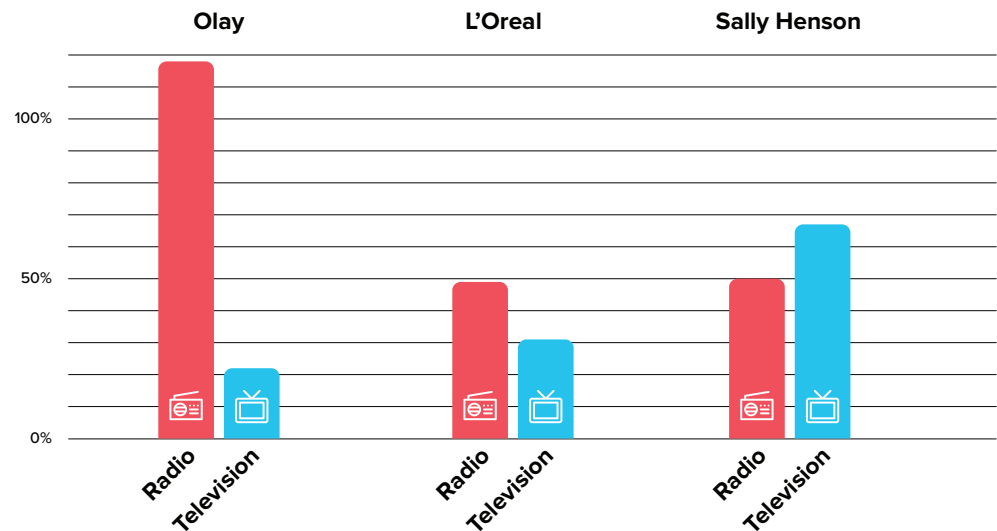
Three spots were within the beauty category from Procter & Gamble, L’Oréal and Sally Hansen. Overall, Radio generated Max Connection scores that were 10% higher than those on TV. Further, the primary target audience of Females had even stronger scores, +33% higher Max Connection scores when they listened to the spots on Radio vs watching the spots on TV.

## Max Connection Scores for Beauty advertisements

### All audience



### Female



# What's happening?

There are a number of factors that could explain the relative differences between audio and video:

1. Explosion of video media options makes it more difficult to breakthrough and connect:
  - a. It's possible that with video, it's becoming more difficult to break through and connect. The explosion of video media options, from Connected TV to TikTok and Triller, may have conditioned consumers to unconsciously filter out all but the most relevant video.
2. The burst of high quality audio content (particularly in the podcasting space) driven by both a democratization of the means of production, and the growth of audio distribution platforms, has returned audio to its spoken word, storytelling origins.
  - a. This may have shifted consumer expectations as it relates to the entire medium of audio - consumers are tuning in not for “background noise”, but for meaningful storytelling.
3. There's a bigger mental and physiological question around consumer media preferences: According [to](#) Carat Global, a large media agency, a growing awareness of screen time and its impact on mental health may be encouraging some consumers to opt for audio-only media, benefiting the growth of podcasts.

Collectively, these factors are influencing the changing neural response of consumers to video and audio channels.

And the trends are holding up during COVID.

In follow-up research commissioned by Brainsights and conducted in September 2020, we measured the subconscious response of more than 400 English Canadian adults as they consumed a range of audio and video content across multiple media and content neuroscience studies. 164 pieces of content were tested, with each piece exposed to at least 100 research participants. Twenty-seven (27) audio files were tested and 137 video segments were tested. This included a range of audio and video commercial executions (brand integrations, ads, branded content, podcast integrations, etc) and entertainment content (news, short films, podcast clips, etc).

Participants were rotated through two modules - an audio-only module, and a video module. Half consumed the audio first before viewing the videos, and half consumed the videos first, before listening to the audio, so as to control for any ordering effects. As they consumed the content, they wore portable electroencephalograms - brainwave readers recording their levels of Attention, Emotional Connection and Memory Encoding to the stimuli consumed.

## Key audio-related findings:

- 74% of audio content segments placed in the top half of Emotional Strength scores for all content tested, whereas just 45% of video did.
- Podcast ads delivered greater Attention, Connection and Persuasiveness scores than Radio ads, and had comparable levels of Memory Encoding.
- Host-read ads, where the audio ads are read by the hosts of podcasts, deliver greater scores across Attention, Connection, Encoding, Persuasiveness and Emotional Strength.
- The findings from this second wave of research confirm the power of audio as a brand-building opportunity, capable of reaching the Connection heights that Video enjoys, and with a growing number of opportunities to connect with consumers.

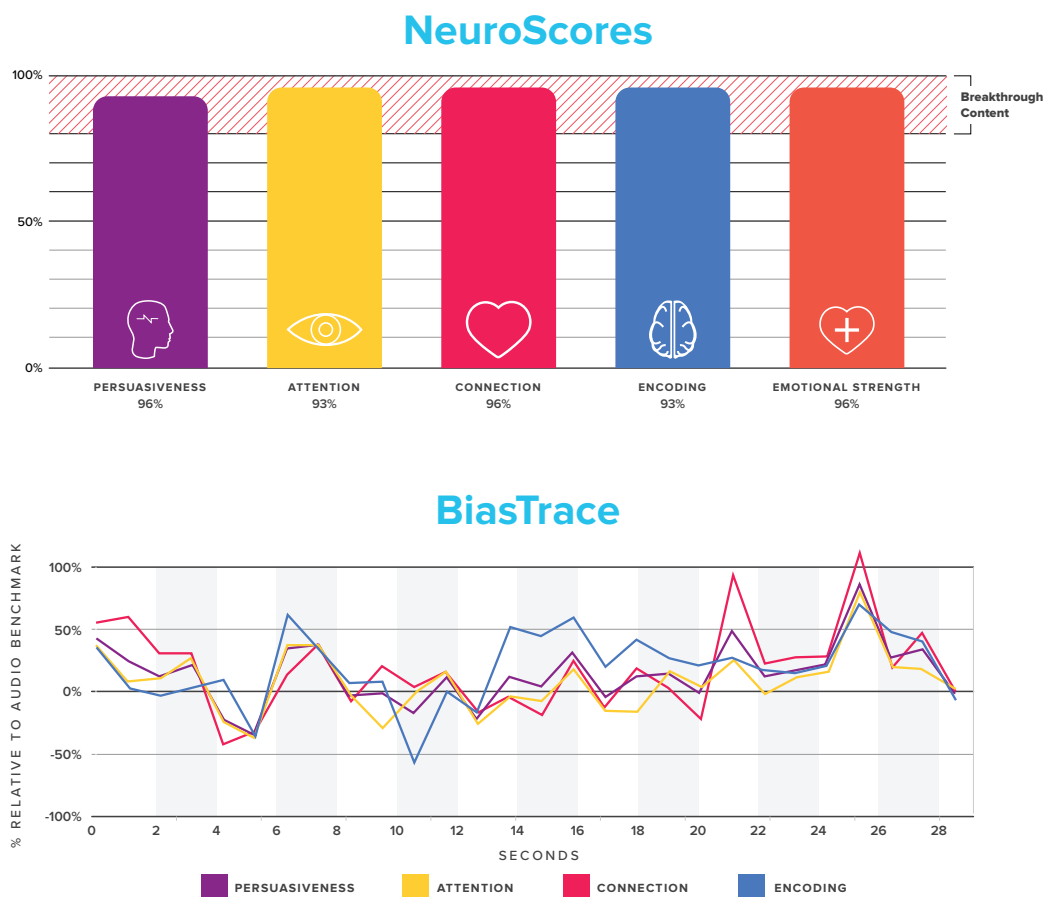
# Understanding Host-read ads:

## Case in point - *Chatter that Matters*

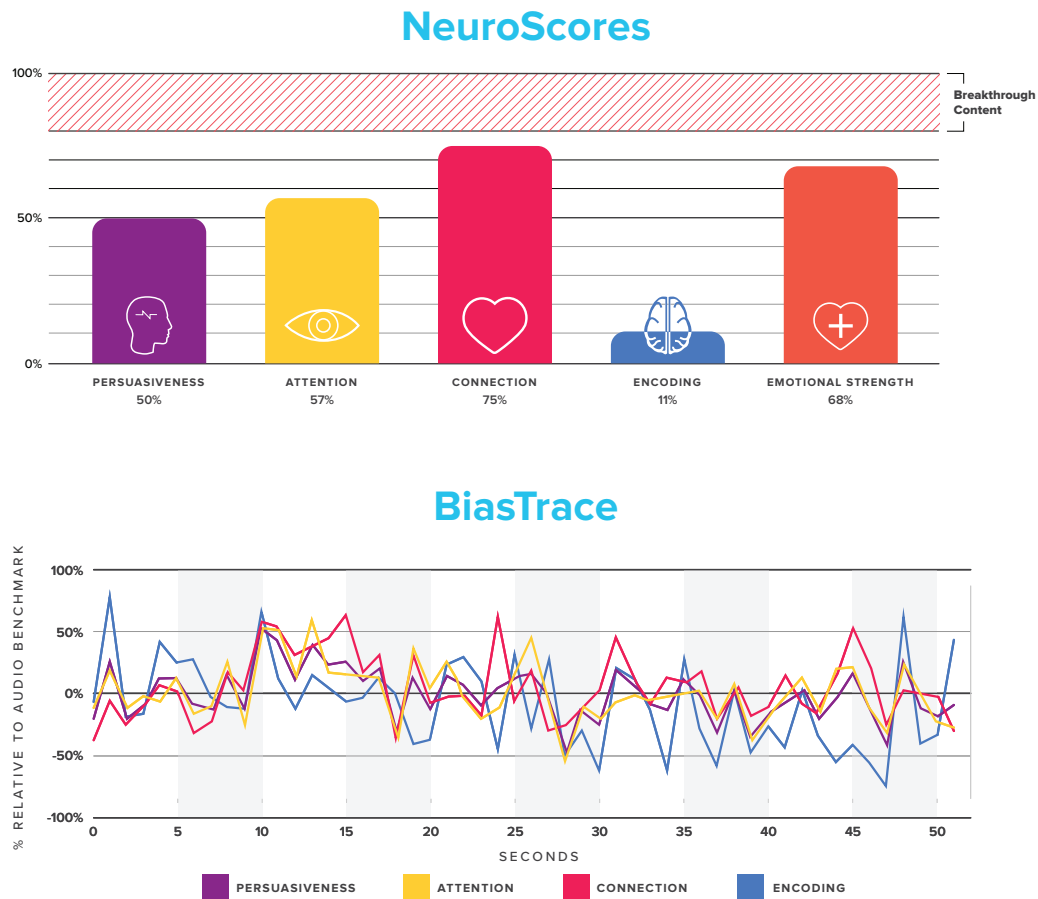
*Chatter That Matters*, hosted by Tony Chapman, an ex-advertising executive, is a lifestyle podcast that pivoted slightly during the pandemic to feature small businesses and the stories of their owners/founders. As an entrepreneur himself, this is a passion of Chapman's, and RBC, Canada's largest bank, sponsored a number of these episodes.

We tested two of these ads, read by Chapman - a short, 30 second promo, and a 60 second mid-roll promo (designed to run mid-episode). We can learn a lot from the differences in performance of the two of these, as to how best to maximize the brand-building opportunity of audio, and the host-read ad.

### Chatter That Matters: *RBC Short Promo*



# Chatter That Matters: *RBC Midroll Promo*



Here, you'll see the overall neuro scores of these two spots, as well as their second-by-second response traces in the Brainsights Bust Bias Creative Intelligence reporting dashboard.

As we can see, the Short promo outperforms the Midroll promo. Why?

- Short promo is not only a better performer versus Audio benchmarks, it more than holds its own versus video ads, too. That includes several RBC video ads.
- Short promo has more energy in it than the Midroll, both in the host's voice and in the background music. This speaks to the power of audio, the power of culture, and the power of the host.
- The main issue with the midroll ad is in Memory Encoding. There was a lot of RBC that was jammed into this ad. People can't encode it all. They'll probably recall that it was RBC (due to frequency), but not the specifics of what the host was saying - the why.
- To mitigate this, best to focus on one or two key pieces to boost the strength of the host's endorsement.

# What does this mean for advertisers?

If you're still thinking about Audio as a channel exclusively for activation, then you're missing out on fully leveraging Audio's potential.

In studies of both Radio and broader Audio executions, and comparing these to both TV and broader video executions, our neuroscience data has revealed strong Emotional Strength scores in audio content, rivalling that of video and speaking to the brand-building potential of Audio media for Canadians.

This emergence of audio as a bonafide brand-building channel challenges the advertising industry's traditional bias as it pertains to audio-based advertising - it's no longer simply tactical, but a genuine mechanism to build brands.

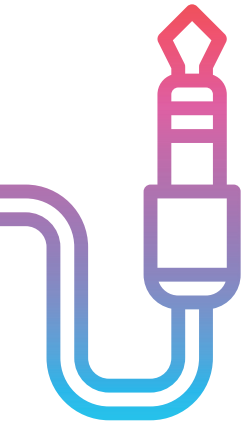
This is driven in part by the changing approach consumers have to audio. The availability of radio tuning apps like Tuned-in and RadioPlayer have made radio more accessible, especially to younger demographics who find the experience of listening to radio/audio via headphones more immersive and engaging. The rise of podcasting with its longer form audio storytelling means that consumers view audio content in a different way - it's not just music, news and traffic.

Brands using audio are also taking advantage of the relationship listeners have with hosts, within the influencer marketing trend, through live commercials, branded conversations, and branded stories. Listeners may see the live engagement as an endorsement of the brand.

Of course, this doesn't mean that brands should ignore visual media in branding - this would be catastrophic. But distinctive brand assets can be built in the audio space as well - think of the opportunity of sonic branding and audio sting development. And brand assets can also be 'played with' in the audio space - think of the famous MailChimp ads in the smash-hit podcast, [Serial](#).

Between greater accessibility, and more diversified, high quality storytelling content, the opportunity for advertisers to build their brands in audio is clear. It's time to stand up and be heard.





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