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STATE OF AUDIO: *THE TRENDS REPORT*

Game-changing shifts from creativity to AI

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IS RADIO

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In the high-stakes advertising arena, we're at a critical inflection point.

Advertising clutter is on the rise, while tech advances and artificial intelligence are transforming every aspect of the game.

To stay competitive through this evolution, incremental change isn't enough — marketers who want to position their brands for growth paths (that would be everyone!) must fully embrace reinvention.

In this timely guide, we explore the trends leading advertisers and early adopters are leaning into to accelerate brand success and stay ahead of the curve.

Four key paths stand out as crucial for navigating this evolving environment:

Harnessing creativity

Riding the AI revolution

Making significant moves in measurement

Activating new audiences

The trends that follow uncover the current state of Audio, and what it means for the future of advertisers interested in not only staying in the game, but truly dominating the field.

CREATIVITY CREATIVITY CREATIVITY

The next wave: How creative alliances and emotional ads drive unmatched results

The #1 key to advertising effectiveness is creative. In fact, an [NCSolutions study](#) confirms that creative has been carrying the team — with **more than double** the contribution to sales than any other advertising element.

While it's easy to underestimate the value of creative — and many advertisers and media agencies unfortunately do — cutting-edge marketers are now making a shift, and increasingly giving creative elements the attention they deserve, especially in Audio. By developing ads that emotionally connect, going deeper with host partnerships, and packing in the positivity, they're positioning their brands FTW.

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Right-brain emotion in Audio advertising is back

THE BATTLE BETWEEN EMOTIONAL AND RATIONAL ADS IS HEATING UP — AND IT TURNS OUT MESSAGES THAT TUG AT OUR HEARTSTRINGS ARE THE ULTIMATE CHAMPION.

Over the past few decades, right-brain emotion in Audio advertising has taken a backseat to more product-centric messages, heavy on the CTAs.

Now savvy marketers are courageously stepping outside of their comfort zone to bring back right-brain approaches based on empathy, relationships, and human connection.

How do you activate right-brain creative? It's all about brand personality. By helping audiences go beyond listening to truly feeling, these ads engage our emotions, become more memorable, and lay the foundation for much more effective campaigns.

LEFT- AND RIGHTBRAIN CREATIVE FEATURES FOR AUDIO ADVERTISING

LEFT BRAIN

TESTIMONIALS
CALL TO ACTION
AUDIO REPETITION
COMPARISONS & CLAIMS
DATA & FIGURES
PRODUCT FEATURES
TECHNICAL LANGUAGE
STRONG PRODUCT FOCUS
FLATNESS, LACK OF AUDIO DEPTH
HIGHLY RHYTHMIC MUSIC

RIGHT BRAIN

CHARACTERS STORY
UNFOLDING CLEAR
SENSE OF PLACE
UNEXPECTED
CONTEXTUAL NOISE
DIALOGUE PLAYING WITH WORDS
DISTINCTIVE ACCENTS
MUSIC WITH MELODY

Emotional messages pay off

Advertisers aren't telling heartfelt stories just for the fun of it (although who doesn't enjoy a laugh-out-loud 30-second spot?) — they're investing in right-brain creative elements because these features outperform.

Anytime you're going after emotions such as laughter and surprise, they go hand-in-hand with risk for a brand. But we're seeing more marketers bravely step up to the plate with emotion-led creative strategies because the risk is proving to be worth the reward.¹

System1 pioneered the first study defining left- and right-brain creative features for radio advertising. The bottom line? Ads that make us feel better deliver long-lasting brand effects, including brand purchase and use.

Ads with positive emotion dramatically change consumer behavior

8.2%
lift in
Consumer Action

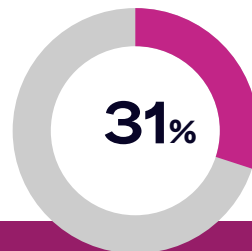
Listen Up! Emotion's Defining Role in Audio Advertising Effectiveness, System1, UK

TREND 'Test and see' is over in the creator economy

THE EXPERIMENTAL DAYS OF CREATOR PARTNERSHIPS ARE OVER — ADVERTISERS ARE ALL IN.

Creator partnerships have officially moved from "nice-to-have" to a "must-have" in media plans, driven by authentic engagement and stellar performance. We're seeing the beginnings of a shift to deeper partnerships, longer campaigns, and non-traditional collaborations.

BIGGER BETS



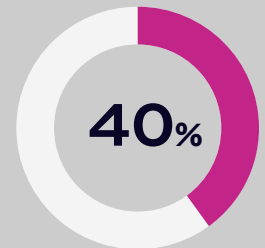
31% of advertisers are increasing investment with creators

Source: Advertiser Perceptions Omnibus, March 2024

UNCONVENTIONAL COLLABORATIONS

Brands are meeting audiences in new spaces, with new voices. We're seeing the "mid-fluencer" trend pick up steam — where brands once only interested in the top shows with the largest audiences, are seeking mid-sized podcast audiences and local radio hosts that boast a smaller but fiercely loyal audience.

GOING DEEPER



40% of advertisers are ditching one-off campaigns for year-long creator partnerships

Source: Advertiser Perceptions Omnibus, March 2024

LOOSENING THE REINS

Advertisers are giving hosts who intimately understand their audience more control, with the well-placed confidence that listeners' trust can drive powerful performance.

Authenticity is critical, especially for younger audiences:

90% of consumers say authenticity is an important factor in deciding which brands they like

Source: Deloitte Digital, Authentic Influence Report, Survey of Gen Z and Millennials

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3 ON-AIR HOSTS share the secret sauce to successful brand partnerships

ED LOVER

Authenticity

HOST, AUDACY'S THE ED LOVER EXPERIENCE AND C'MON SON! PODCAST, FORMER HOST, VO! MTV RAPS



Ed Lover reminds us that creators need freedom and autonomy to make authentic connections with listeners.

"I don't endorse anything I don't believe in. Because I'm a man of the people. So if I deal with any brand, I believe in your brand. I do my research ... because an endorsement is personal to me. When I used to endorse Apple, I totally 100% owned Apple products — I was excited about it."

PARTNERSHIP TIP: Talent endorsements support goals all the way through the funnel, so use authentic connections to drive powerful consideration and conversion goals.



BRU

Audience Trust

HOST, AUDACY'S THE BRU SHOW
MULTIPLATFORM INFLUENCER

Bru knows brands succeed with hosts who have built long-lasting trust with their audiences.

"It's all about the trust really... People can have millions of followers, but if they don't really know you, or really relate to you, then I don't think it's going to do well with a brand or a partnership. Radio is such an intimate place. We're talking about our lives and our experiences, and at the end of the day developing a real relationship with [listeners] — and that goes a long way when it comes to endorsing a product."

PARTNERSHIP TIP: Creator partnerships are here to stay. Trust your creators. They are the best concepting partner, and they know what activates their audiences.



MEGAN HOLIDAY

Passion

HOST, AUDACY'S SKROQ LOS ANGELES AND LIVE 105 SAN FRANCISCO

Megan follows her passions.

"I want to endorse things that I'm really passionate about, and that I really care about. I endorse the California Department of Mental Health because I'm passionate about trying to help people in any way that I can."

PARTNERSHIP TIP: Activate creator partnerships to engage those unique or niche audiences. It's highly effective for brands that want to align to a host's passionate interests and causes.

TREND

The warm and fuzzies department

WE'RE ON THE JOURNEY TO JOY. BRANDS AND CONTENT TEAMS ARE EMBRACING HAPPINESS AND PLAYFULNESS, GIVING US MORE FEEL-GOOD CONTENT THAN EVER.

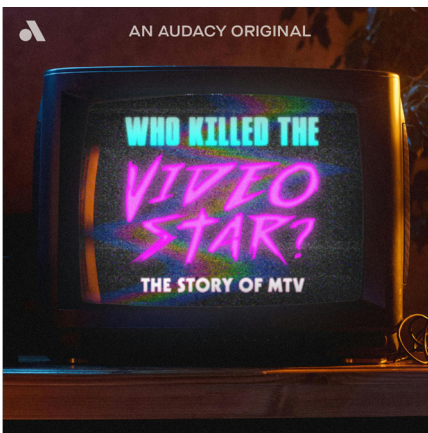
Life these days is intense. In a world of stressful news and hectic schedules, publishers are coming to the table with the feel-good vibes consumers are looking for to escape. Brands that join in on the fun will be rewarded with our attention and affection.

Blast from the past: The power of nostalgia

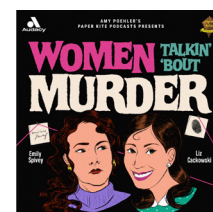
Where are they now? What was it like? What went on behind-the-scenes? Audiences are craving the inside dish, and podcast studios are answering the call. That's why our eight-part Audacy Podcasts original series, **Who Killed the Video Star? The Story of MTV** hosted by former MTV VJ Dave Holmes hits the sweet spot, taking us back to follow MTV from its meteoric rise to its forgotten fall. There's space for brands to connect with audiences through throwbacks, nostalgia, and visits down memory lane.

Hitting the funny bone

Fun and silliness are surprisingly powerful at engaging our emotions and unlocking brand memories. Packing in the positivity with joy, laughter, or surprise helps publishers and brands lift spirits — and gain fans. That's why the podcasting world is doubling down on comedy. Some of the biggest names in comedy — including **Amy Poehler, Dana Carvey, David Spade, Jenna Fischer, and Angela Kinsey** are bringing their unique style to podcasts, with an entire slate of shows where they have full control and can share the laughter every week.



Office BFFs Jenna Fischer and Angela Kinsey break down individual episodes of “The Office” and give exclusive, behind-the-scenes stories



Building on their success with **Fly on the Wall**, Dana Carvey and David Spade riff on current events and pop culture every week on **Superfly**

Amy Poehler brings to life a trio of improvised parody podcasts created purely for hilarious enjoyment

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WHAT IT MEANS FOR BRANDS

The fastest way to a brand fan's heart is through your ad creative. Ads with emotional stories, vibrant characters, and dialogue build longer-lasting memory structures that connect us to brands and drive more sales.

"Bespoke Audio creative — built explicitly for the medium — is incredibly important. In the absence of visual imagery, a great script, sound design, voiceover and sonic branding serve as the essential ingredients for a killer audio ad. Done well, it can be exponentially more effective than a video or digital ad."

Paul Suchman, CMO, Audacy

The power of personality is real. Advertisers are making the case for major investment in partnerships that bring brands closer to hosts — and listeners who love them.
Try:

Longer-term relationships

Greater control to the hosts who know their audiences best

Incorporating mid-sized shows with a highly loyal fanbase

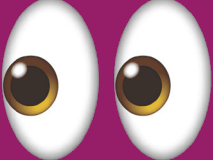
No medium drives the positive vibes quite like Audio. Feel good-ness is that hard-to-quantify mix of trusted hosts and great content that keeps listeners coming back for more — and Audio tops the charts where that's concerned.

70% of Americans look to Audio to relax, or get in a good mood

MRI Simmons 2023 Fall USA, Media Attitudes for Radio/Podcast: A Good Escape, Relaxes Me, Puts me in a Good Mood, Base= US A 18+

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Wondering how we could get 7 pages in and not yet tackle AI's impact on creative? Cool your jets — it's right around the corner. Get ready for a deep dive into the world of AI.

ALL EYES ON AI
ALL EYES ON AI
ALL  ON AI

***The most disruptive
change in a decade***

There's no doubt that AI is reshaping the advertising landscape. With nearly all brands integrating some form of AI into their marketing efforts, the buzz around AI isn't just hearsay — it's here to stay... and make a real impact. And as with anything in marketing, the proof is in the budgets — as major brands and agencies plan to seriously ramp up spending on AI-driven campaigns.

What comes next is anyone's guess, but AI certainly appears to be more of a long-term business strategy than a passing trend. So what are some of the early implications for Audio advertisers?

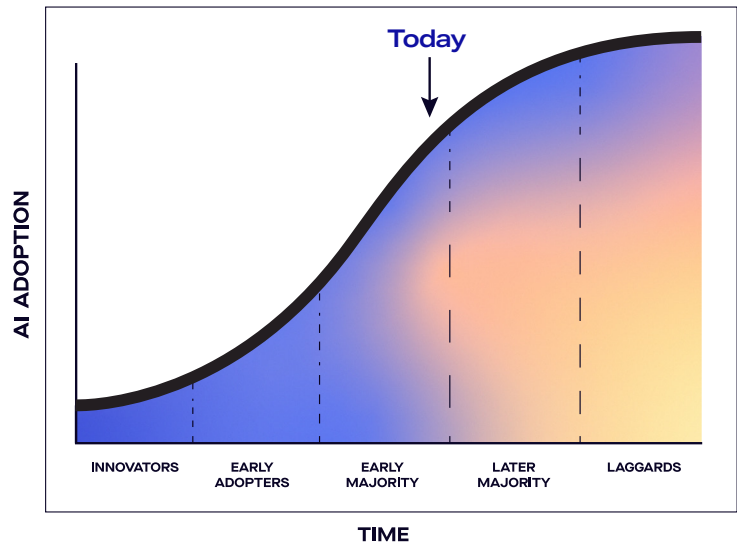
TREND Taking the plunge

WHERE DO YOU FALL ON THE AI ADOPTION CURVE?

AI adoption is fast and furious. For a marketer who hasn't already jumped into the pool and done a few warmup laps, the smart advice is to rush over to the starting block. It seems everyone (and we mean everyone) in advertising is using and planning for AI.

We all know the name of the game for marketers right now is to stay ahead of the adoption curve. And it's a steep one — much more accelerated than other tech advances we've seen in the past 25 years. Which means that brands are taking action, piloting solutions, and jumping into implementation at a faster clip than we're used to.

And there are big expectations placed on these early AI bets. Brands are not merely dipping their toes in the AI pond for fun — the expectation is that fully implemented solutions are going to drive real impact and efficiency starting now. We're already seeing AI fundamentally shifting content creation, personalization, and audience formation. And the future promises to support even more complex use cases as adoption grows and platforms improve.



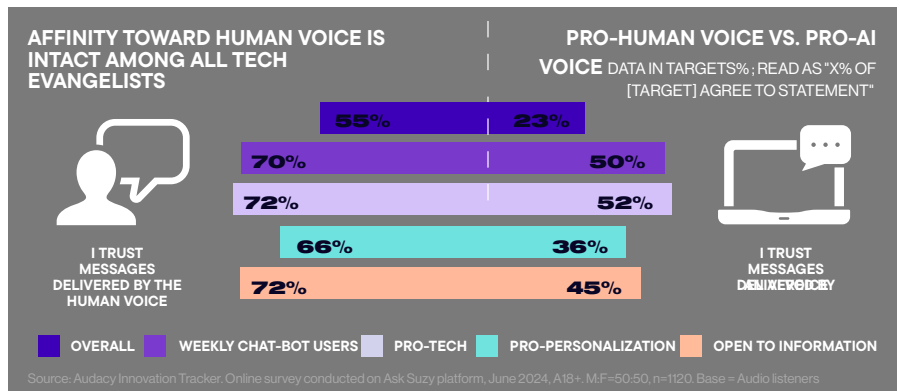
88% of marketers expect AI to have serious impact between now and mid-2025

eMarketer, August 2023

Tapping into Trust in the World of AI with Voice

In the age of AI, trust is more critical than ever for brands. AI is truly revolutionizing productivity and creativity. But there's a catch: 75% of US adults are wary of AI's potential to deceive with false information. This trust gap creates an opening for advertisers to step up with transparency, from product launch to delivery.

And here's where Audio shines. The human voice — whether through radio or podcasts — stands out as a beacon of trust. Audacy's Innovation Tracker shows that **people are more than twice as likely to trust a human voice (55%) over AI content (23%)**. And this preference extends to advertising, where consumers express greater comfort with Audio ads crafted by humans compared to those produced by AI. This makes Audio platforms a trusted partner for brands that recognize the importance of transparency and authentic human connection. While AI will streamline, nothing beats the trust and relatability of real human voices.



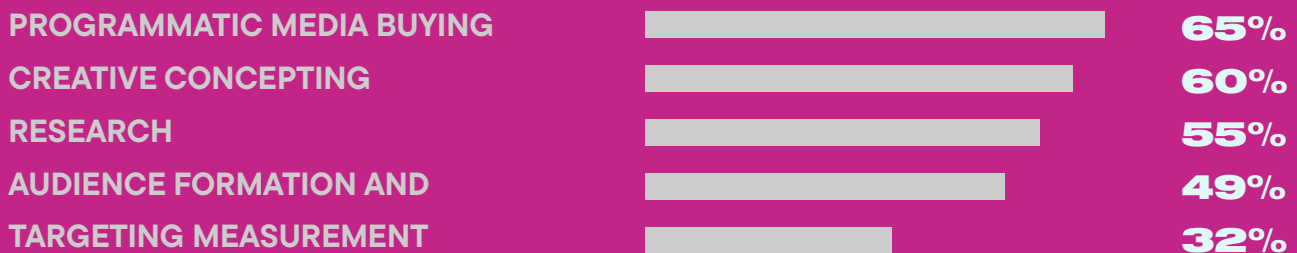
TREND

AI use cases going beyond ChatGPT

THE LOW-HANGING FRUIT IS PROVING... FRUITFUL. AI IS DRIVING EARLY SUCCESS WITH CREATIVITY AND SMARTER MEDIA BUYING.

The AI era for advertisers is in full swing — with pilots in overdrive and live AI implementations in their early and mid-level stages. The first use cases for advertisers are heavily focused on programmatic buying, creative conceiving, research, and audience targeting.

TOP AI USE CASES IN ADVERTISING



Source: Beyond the Buzzword: The Impact of AI on Advertising, AdExchanger, Nov 2023

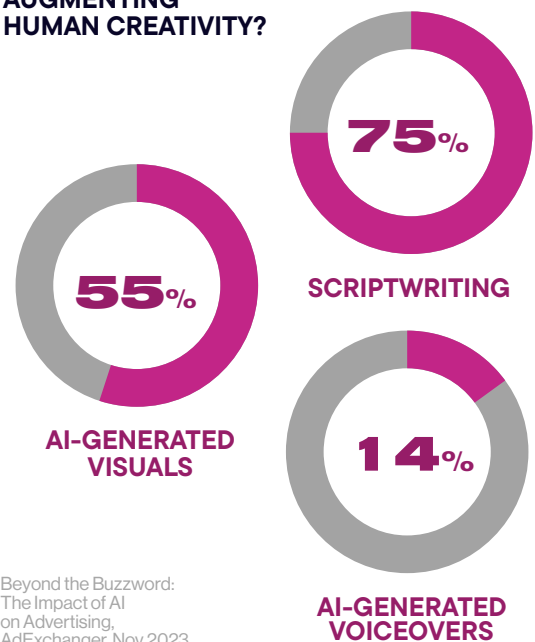
Creativity reimagined

AI is already revolutionizing the world of creative and content. Marketers are using AI as a test lab, creating multiple versions of copy for script tests, or dozens of Audio spots for enhanced audience targeting, all made easier with an AI-assist. While AI handles time-consuming tasks, humans power strategy, creativity, and oversight, ensuring the final result is more innovative and effective.

Better media buying

A hefty chunk of advertisers are doubling down on stronger audience segments (49%) and efficient programmatic buying (65%). And these shifts are not just about tech adoption — we’re reimagining how tech and human processes can team up. Marketers are seeing AI work its magic by improving bidding strategies, enabling adaptive targeting, and finding those coveted lookalike audiences.

WHERE IS AI AUGMENTING HUMAN CREATIVITY?



Beyond the Buzzword: The Impact of AI on Advertising, AdExchanger, Nov 2023

Source: Audacy, 2024 Fall State of Audio

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AI-powered Audio: Magic in the microphone

RADIO AND PODCAST PUBLISHERS ARE ROLLING OUT ENHANCED FEATURES TO SUPERCHARGE LISTENING EXPERIENCES AND ADVERTISING STRATEGIES.

At Audacy, we're activating new AI solutions to help listeners get to the content they love faster and give marketers tools to personalize their ad campaigns. Turn up the volume on these AI-driven enhancements being piloted and launched in the Audio world.

“Audio platforms, which already dominate consumer time spent, are also experiencing rapid growth in advertiser demand. AI and tech innovation will allow advertisers even more flexibility to buy and measure their audio campaigns in the manner best aligned to their individual campaign objectives, while continuing to enable consumers to listen on their terms.”

J.D. Crowley, Audacy Chief Digital Officer and President of Podcast and Streaming

Dynamic AI contextual ads for podcasts

AI is analyzing the content of individual podcast episodes to match advertisers with the most contextually relevant content. You can now perfectly tailor ads to the topics being discussed.

Imagine listening to your favorite lifestyle podcast. Today the hosts are buzzing about their latest home remodel — diving into kitchen renovations, paint selection, and the latest smart appliances. Don't be surprised to hear an ad from The Home Depot.

Synthetic voice & creative testing

Voice is jumping into the AI revolution too. AIVO (AI voice over) solutions are being piloted on a number of fronts. But let's be clear — nothing can replace the magic of a real live host connecting with an audience. So the exciting experimentation is happening with language translation, automated spec spots for creative testing, and smooth navigation between playlists and content selections.

X-ray vision for Audio

Imagine having X-ray vision for your favorite sports stations and podcasts! Whether you're tuning in for post-game analysis, trade talks, or hometown predictions, there are some shows you just don't want to miss. You can already use Audacy's patented Rewind functionality to see chapters and descriptions on live shows, and to catch up on episodes and segments you missed.

Soon, you'll be able to even more easily discover and navigate on-demand broadcasts and podcasts thanks to new AI-enhancements, letting you dive straight into the conversations that interest you most. It's like having your own personal guide for all of your favorite Audio content!

WHAT IT MEANS FOR BRANDS

Promising pilots pave the way for more funding

CMOs are having no trouble making the case for AI budgets. With early efficiencies already delivering results, the AI line items are becoming more permanent.

Creativity unchained

Marketers are embracing generative AI as a creative ally. AI will continue to support human creativity as marketers accelerate production.

Personalization unlocks new audience value

More complex AI use cases are coming. Brands ahead of the curve are beginning to activate hyper-dynamic campaigns that personalize audience segments, creative inputs, and contextual triggers using real-time analysis.

Human connection lives on

With generative AI's expansion, human connections will be a major focus. Responsible AI with a human approach is key to an authentic brand identity.

Learning the rules

With great power comes great responsibility. In this next phase of AI development, marketers will need to check for blind spots as questions around consumer trust, ownership, misinformation, bias, and regulation find answers.

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Up next:
The
measurement
moves coming
your way

MEASUREMENT MEASUREMENT MEASUREMENT

3 next-level metric moves

Audio measurement has moved upstream. Long gone are the days of waiting for post-campaign results. Today's advanced measurement tools kick in pre-launch and mid-flight to optimize campaigns early. And predictive analysis is now part of the toolkit to gauge how a campaign will perform before it hits the airwaves.

Check out these three next-level Audio metric moves now.

TREND The marriage of brand and performance

THE DIVIDE BETWEEN BRAND AND PERFORMANCE MARKETING IS GONE

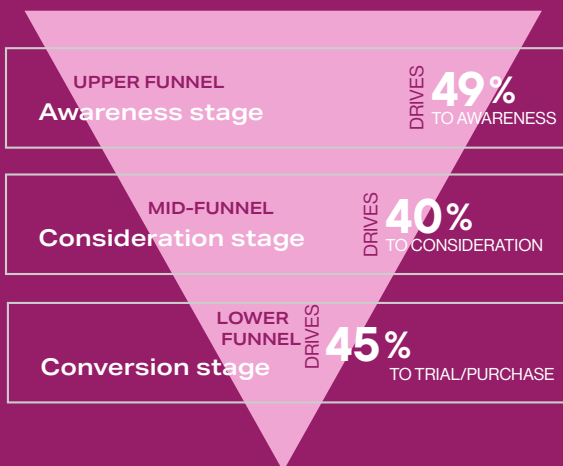
Brand metrics are having a moment. The power of performance and driving audiences to purchase will always be important — but savvy advertisers are bringing the long-term power of the brand back into the equation in a big way.

IN THE PAST TWO YEARS, WE'VE SEEN A 56% JUMP IN MARKETERS' PLANS TO INVEST IN BRAND MARKETING

The Voice of the Marketer, WARC, 2024

Not to play favorites (but we will)... Audio has always been a terrific brand builder. Radio, streaming and podcast platforms have a reputation for being the strongest channels for driving brand awareness and affinity. And with modern measurement capabilities, it's easier for brands to see Audio's powerful pull straight through the funnel.

PERCENTAGE OF U.S. ADULTS IMPACT BY AUDIO ADVERTISING



Source: Nielsen Commspoint

CMOs are not shying away from this trend – they’re boldly sharing their views.



LAURA JONES, CHIEF MARKETING OFFICER, INSTACART

“Brand is really a multiplier on performance... If we have an incredible brand and people love us, then we can bring new customers into the funnel, we can convert them better and we can retain them better. We have to be incredible storytellers and understand how to build a great brand, and also be able to hit all those metrics that we have to hit to really have accountability to the CFO [and shareholders].”

The Drum, The CMO's remit is expanding dramatically, say top brand marketers at Possible Miami, April 2024



DOUG MARTIN, CHIEF MARKETING AND DISRUPTIVE GROWTH OFFICER, GENERAL MILLS

“We really need to continue to invest in building the brands, because it is decades of consistent contributions to the brand equity bucket that made our brands what they are today.”

The Voice of the Marketer, WARC, 2024



TARIQ HASSAN, CHIEF MARKETING AND CUSTOMER EXPERIENCE OFFICER, MCDONALD'S

“For the longest time, it was like brand or performance, and I just refuse to participate in it. If you think about the construct, when were we ever told, ‘Oh, yeah, go build the brand, but who cares if it performs? Oh, and by the way, perform the heck out of something, but who cares if it deteriorates the brand!’ It’s just counterintuitive in terms of what we should do.”

The Drum, Overheard at Possible Miami 2024: ‘We’re obsessed with tomorrow while neglecting today’, April 2024

Source: Audacy, 2024 Fall State of Audio

TREND Powering up the personalization

CUSTOMIZED AD CREATIVES DRIVE 2X THE CONVERSION RATE

We're all Audio fans here. We know that ads feel more appealing when they seem personalized just for us. Dynamic ad solutions are here to give that personal touch a serious boost.

Personalized creative

We know that AI can help us pick the best ad message. Now partners like **Claritas** and **Frequency** are going one step further to dynamically pick the perfect elements of ad creative for key audiences.

HERE'S HOW IT WORKS

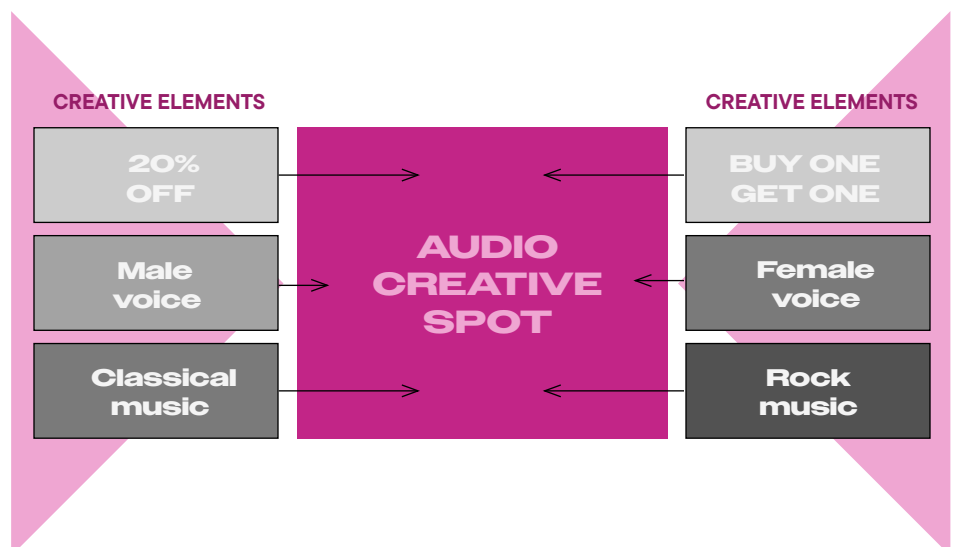
Say a Millennial mom buys an exercise bike after hearing a spot with soft music and a female voice. The system then recommends similar ads to others like her. Meanwhile, her Boomer dad might hear the same pitch, but with upbeat music and a male voice. This tool can adjust music, voice, offer — and even target based on location or weather, adapting in real-time.

Killer conversions

Take Claritas' AI tool. It digs into conversion data from lookalike audiences to serve up ads custom-built with the highest chance of success. Recent tests show this predictive tool can double conversion rates.

“As the campaign runs, machine learning studies what is driving conversion, and sonic or offer elements are selected for the person listening to the campaign.”

Kevin Greenwald, SVP, Advertising and Audience Products, Audacy



TREND

Unifying broadcast and digital Audio metrics

PUTTING AN END TO SILOED AUDIO MEASUREMENT

Americans are obsessed with Audio — anywhere we can get it. Combined listening across Audio platforms has surged 66% in the past two years. But while audiences embrace “Total Audio,” many brands and agencies still silo OTA, digital streaming, and podcast ads into different buckets, which complicates Audio planning, buying, and measurement.

Now that’s changing, as publishers, agencies, and measurement partners join forces to develop the ultimate unified Audio measurement solution — bringing the dream of attributing purchase conversions, form fills, and incremental lift across channels to life in the near future.

There’s a lot of exciting movement in this space. We’re building out our multi-platform solution, our measurement partners are developing integration capabilities, and major media buyers are investing in Audio attribution paths as well. All with the same goal — to deliver the true impact audio investment has on an advertiser’s bottom line, and give radio and digital Audio a bigger seat at the media planning table.

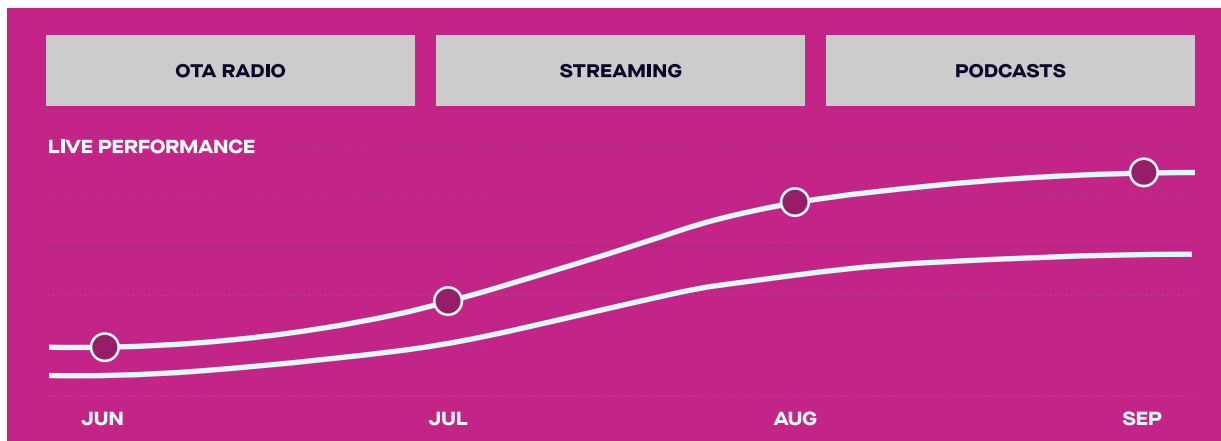
AGENCIES GET IN ON THE ATTRIBUTION ACTION

Horizon Media recently launched a new partnership with ArtsAI to combine real-time data with performance results across broadcast radio, streaming Audio, and podcasts — proving Audio’s ROI and easily comparing Audio to video channels.

“We’re seeing increased investment [in Audio] because of this. It’s changing the media plan.”

Lauren Russo, Executive VP Managing Partner, Innovation & Performance Audio, Horizon Media

Source: Inside Radio, Horizon Next Attribution Service Promises Better View Of Audio ROI, May 2023



WHAT IT MEANS FOR BRANDS

Don't hold back on brand marketing

Choose media platforms that beat out the competition for both brand and performance marketing, with Audio at the top of the list.

Dynamic creative is getting turbocharged

Tailor every element of your ad message and see up to 2X the conversion rates.

Prepare for what's coming

Prepare media planning, buying, and attribution teams for holistic visibility into your Audio campaigns. Easily compare Audio results to video and digital for true campaign-driven revenue insights.

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So what steps are advertisers taking to reach their goals? They're activating fresh new audiences. Consumer targeting looks different as we head into the future.

ACTIVATE AUDIENCES

*The advertising game is evolving,
and so are the audience
segments that brands need to
reach*

From tech-savvy Gen Alpha to superfans, today's consumers expect more personalized, authentic connections.

To stay ahead, advertisers must tap into these shifting trends and speak to audiences where they truly engage.

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Predictive audiences: targeting made smarter

WITH INSIGHTS FROM HUNDREDS OF PAST CAMPAIGNS, AUDIENCE MODELS SPOT THE SEGMENTS THAT CONVERT BEST.

Every marketer dreams of hitting the bull's-eye with audience targeting. But how do you know who's most likely to convert? Now predictive models, like those we're piloting with **Claritas**, use past purchases to level up audience targeting.

HERE'S HOW IT WORKS:

Build your audience

By diving into data from past Audio campaigns, these models create high-conversion segments that outperform general listeners. This means your message lands on just the right ears.

Customize by category

"At Audacy we're testing this with three top industry verticals. We've seen what converts, and now we can hone in on those audiences by category to fuel results."

*Kevin Greenwald, SVP,
Advertising and Audience
Products, Audacy*

Past predicts the future

Let's take pet food, for example. If your brand wants to find new buyers, we'll analyze past pet owner campaigns to find the listeners most likely to purchase the kibble and bits. No more generic demos — it's all about precision targeting.



TREND Fandom targeting



IT'S TIME TO FEED THE FANDOM. THERE'S UNTAPPED POTENTIAL FOR MARKETERS LOOKING TO DRIVE HIGH-ENGAGEMENT CONNECTIONS WITH SUPERFANS.

When we talk fandom, most of us think of sports fans. It's easy to conjure up a picture of a bare-chested Jason Kelce cheering on the Chiefs from the stands. But fandom comes in many flavors. Sports fans are often diehards with a local connection and identity. Their passion goes way beyond the game. That's why we see so many popular sports radio shows, thriving podcasts, and behind-the-scenes documentaries. But fandom touches almost all of us, whether through sports or entertainment.

Arguably today's most powerful fan community is the Swifties. Fans are listening to her music, buying concert tickets, sporting album-themed merch, and making friendship bracelets. In a cool crossover, they're even listening to her boyfriend's football podcast.

Source: Sports Audio Report 2024 by Edison Research, SiriusXM, Group M

Fan identity

What some marketers are missing is that fandom doesn't clock out. Deloitte's latest research shows that, for many of us, fandom is an important part of our identity. Not just on game day, or album launch day — but all the time.

Sports and music fandom are the strongest strains, with nearly

40% of consumers saying their fandom for their favorite team and artist is important to their identity.

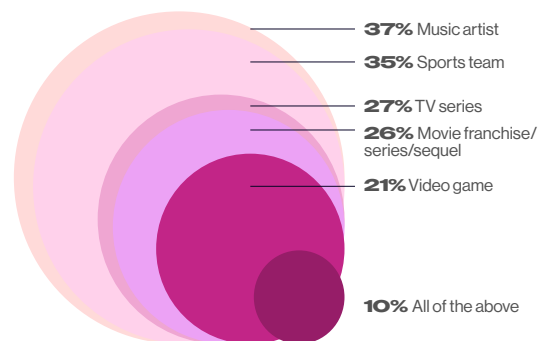
Helping brands connect to fans

Hyper-engaged fan groups are a marketer's All-Star team. These dedicated fans — especially music and sports enthusiasts — drive tremendous engagement and loyalty, proving to be a powerful force when effectively targeted.



MUSIC AND SPORTS FANDOM IS IMPORTANT TO OUR IDENTITY

Percentage of consumers who say fandom for their favorite ___ is extremely or somewhat important to their identity



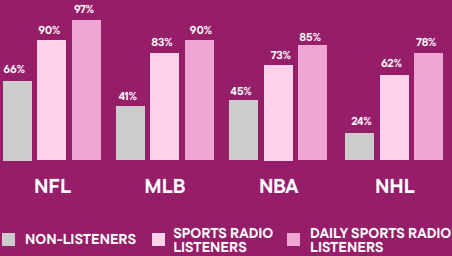
Deloitte Digital Media Trends, March 2024



SPORTS & ADVERTISER IMPACT STUDY | THE FACE OF FANDOM

Across the country, 84% of Americans identify as sports fans, but the most avid, committed fans are Sports Radio listeners.

Sports Radio listeners are the true diehards



Advertiser trust wins on Sports Radio

Fans are **4X MORE LIKELY** to trust brands that support their teams

Audacy makes champions of brands

Our sports radio listeners are **4X more likely** to purchase from brand advertisers

Sources: Audacy Sports Radio Study, conducted by Vision Insights, n=2275 sports fans in Boston, Chicago, Dallas, Detroit, Philadelphia, New York, San Francisco markets, P18+, July 2024

CASE STUDY

Swifties, delivered.

Our Audacy team in Philadelphia was gearing up to launch a new format on WTDY and needed a standout way to get the word out. With Taylor Swift as a key artist for the new HOT AC format, the perfect opportunity became clear. The team engaged Taylor Swift's fan base.

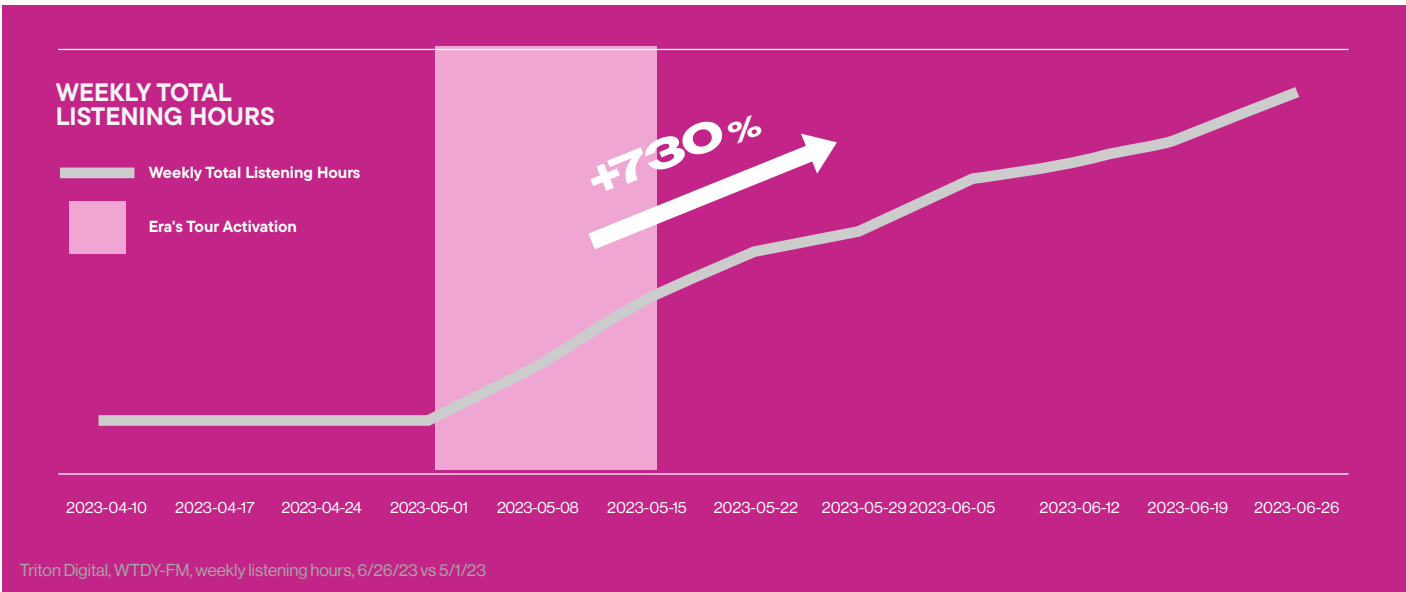
In the lead-up to her first Philly Eras tour stop in Philadelphia, the station temporarily rebranded Philly's 96.5 TDY to **Ninety SWIFT Five, T-A-Y**, playing only Taylor Swift's music for

four days straight. This move sent listenership through the roof, not just for that weekend, but in the following months too. We're talking skyrocketing growth of 7x. No bad blood here. The Swifties formed a strong bond with the station, driving long-term engagement.

This shows just how powerful fandom can be. Imagine being a brand sponsor during this promotion — you'd gain access to a highly engaged, loyal fan base, which is



incredibly valuable. Savvy brands are jumping in, launching contextually relevant campaigns that tap into these dedicated fan communities, thanks to new audience segments and targeting capabilities.



TREND

Podcasting at scale

SHOW-LEVEL BUYS HAVE BEEN THE TRADITIONAL GO-TO FOR ADVERTISERS. BUT NOW, WITH LARGESCALE PODCAST NETWORKS – THE OPPORTUNITIES HAVE OPENED UP.

For years, (we're actually bleeding into decades at this point), marketers have been buzzing with excitement around podcast advertising, often building their campaigns through show-by-show or episodic buys. But in the last 18 months, we've seen a shift in strategy. Advertisers are unleashing the full power of podcast advertising with scaled media buys.

Podcasts have catapulted from niche to mainstream, attracting 135 million listeners monthly. And the truth is, your audience is everywhere. Millennial Moms want more than just parenting podcasts. Business owners crave more than just financial tips. And you'll find Gen Z are fans of more than just celebrity and influencer content.

Source: Infinite Dial, Edison Research, 2024

THE HYBRID MODEL

Why choose between a single podcast or a broad portfolio? We recommend a hybrid model. Marketers select specific shows and hosts for deep engagement, and layer on cross-network addressable buys for audience reach. The pivot to network media buys allows you to easily reach your customers with audience-based targeting at scale. At Audacy, our growing portfolio of shows gives advertisers access to exclusive content, formats, and, most important, audiences.

BUY THE AUDIENCE ADDRESSABLE AUDIENCES

Reaching your target demo of podcast listeners, no matter what they're listening to.

1

LISTENER PLAYS PODCAST ON ANY LISTENING DEVICE/PLATFORM

2

USER'S IP ADDRESS AND USER AGENT IS USED TO DEVELOP A LISTENER PROFILE

3

DETERMINED IN REAL TIME IF THE LISTENER PROFILE MATCHES THE CORRESPONDING 9:1K+ AUDIENCE SEGMENT PROFILE

4

LISTENER IS SERVED A PRODUCER-READ DYNAMIC AUDIENCE TARGETED AD

BUY THE SHOW CURATED CONTENT COLLECTIONS

Reaching your target of podcast listeners based on the type of content they're listening to.

Custom host or producer reads will run across Audacy's premium podcast network in contextually relevant shows that align with your brand's target audience.



TREND

Embracing the influence of Gen Alpha

ARE YOU READY FOR THE YOUNGEST GENERATION? THEY'RE VOICE NATIVES, SMART SPEAKER SHOPPERS, AND BIG PURCHASE INFLUENCERS.

Today's kids are growing up in a vastly different environment than their Millennial parents did. Gen Alpha's media and shopping habits will require marketers to strategy shift.

Voice natives

Born into a digital world, Gen Alpha has been using 'devices' practically from the womb. Every aspect of their lives — rest, education, play, or entertainment — involves tech. That's why Gen Alpha is one of the most comfortable around responsive technology — in fact, a step ahead. While the Millennials adapted to touch-screens, Gen Alpha was born into voice-recognition. And they have a strong affinity and attention span for Audio content, making smart speakers a seamless part of their routine.

THIS!
IS RADIO

90% of parents indicate that their children are very attentive when they listen to content on smart speakers

Source: Audacy Gen Alpha Survey, Ask Suzy, n=818 parents of A0-12 year old children, Nov 2022

79% feel their kids are more comfortable giving voice commands to smart speaker technology than they are

Source: Audacy Gen Alpha Survey, Ask Suzy, n=818 parents of A0-12 year old children, Nov 2022



Purchase influencers

Kids these days — not only are they heavily influencing what their parents buy, but in some cases, they're using voice activation to make the purchases solo (with permission, of course!).

FOUR-IN-TEN Gen Alpha parents find it hard to resist children's purchase requests.

Source: 2022 Fall MRI USA, Parent of child currently living with respondent AND Age of any child 0-11 years

Gen Alpha parents are 32% more likely to agree that their children significantly impact the brand they choose.

ONE-IN-FIVE kids are shopping on their own using smart speakers.

Source: Audacy Gen Alpha Survey, Ask Suzy, n=818 parents of A0-12 year old children, Nov 2022

Marketers can look to Audio for authentic connections between brands and families with Gen Alpha kids, giving brands access to the key moments when families are discovering new information, having joint experiences, and when kids are gently influencing (or outright begging) for products that influence their purchase decisions!

WHAT IT MEANS FOR BRANDS

Get ready to target smarter using predictive audiences

Make your media work harder. Let the data find customers ready to buy, to ensure your ads hit the bull's-eye every time.

Better buying with podcasts

Shift your strategy to include show-level buys *and* cross-network audience plays to meet your audiences where they are.

Find the fans

40% of consumers say their fandom for their favorite music artist is important to their identity. Tap into these deep emotional connections with contextually relevant campaigns.

In the dynamic world of Audio advertising, staying ahead means embracing innovation, getting creative, and being flexible.

Advertisers who dive into the latest trends and tech will find themselves on the fast track to audience engagement and campaign success.

THIS!
IS RADIO

