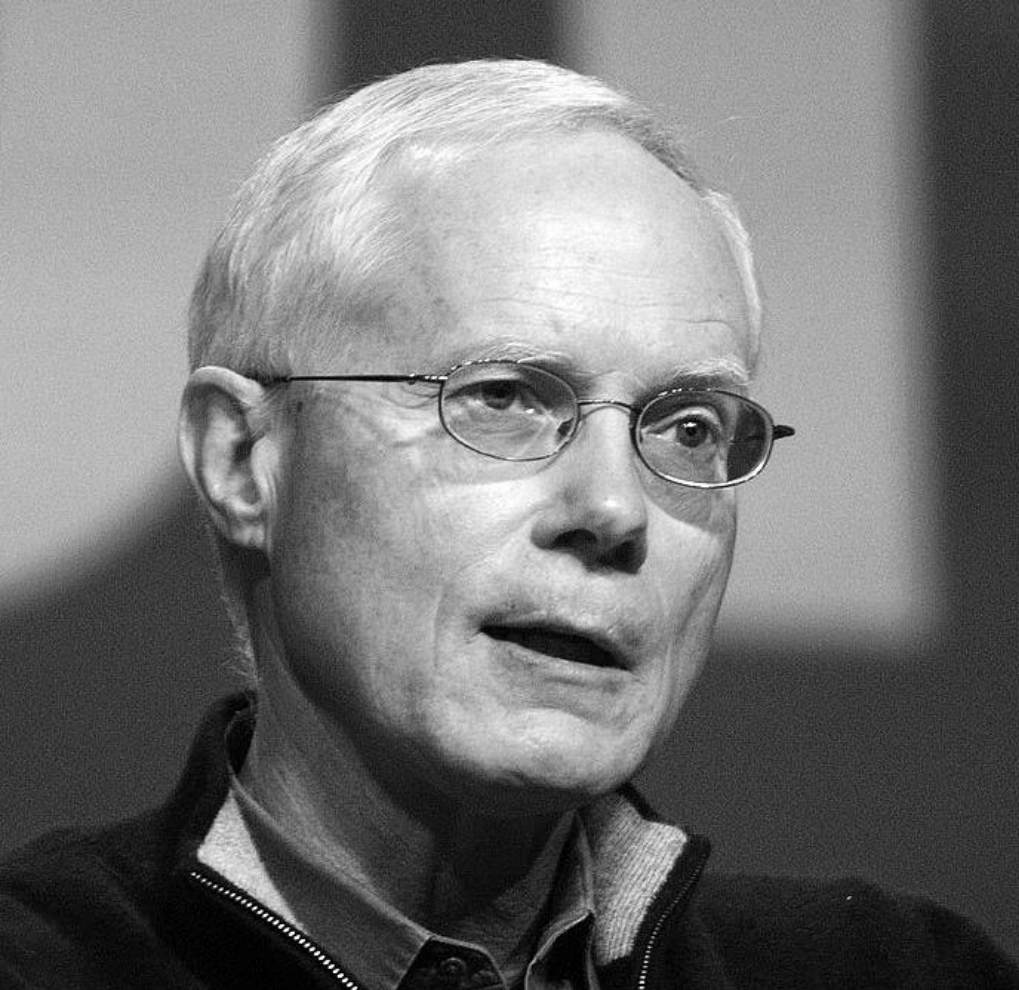


THE #1 MEDIUM DRIVE WORD OF MOUTH

Word of Mouth Drives Sales, Radio Drives Word of Mouth



“

A brand is no longer what we tell the consumer it is – **it is what consumers tell each other it is.**

”

Scott Cook | Founder | Intuit

Power of radio and audio

TotalSocial has a history of working with radio and audio



Radio Ranks As Most Trustworthy Source in New iHeartMedia Poll

The survey also revealed radio delivers tangible benefits to listeners, from improving mood to remaining connected to the community



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Survey: Listeners Trust In Radio Has Grown While Social Media Trust Has Declined.

Study: Podcast Audience is a WOM Powerhouse

Published by Engagement Labs July 01, 2021

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“Even before COVID-19, the podcast industry was seeing rapid growth, with monthly listeners reaching 645mn globally in 2019 and advertising revenues growing at a double-digit rate; industry revenues are poised to more than double by 2024,” according to [PwC’s Entertainment & Media Outlook 2020-2024](#).

Conversations drive sales



10%

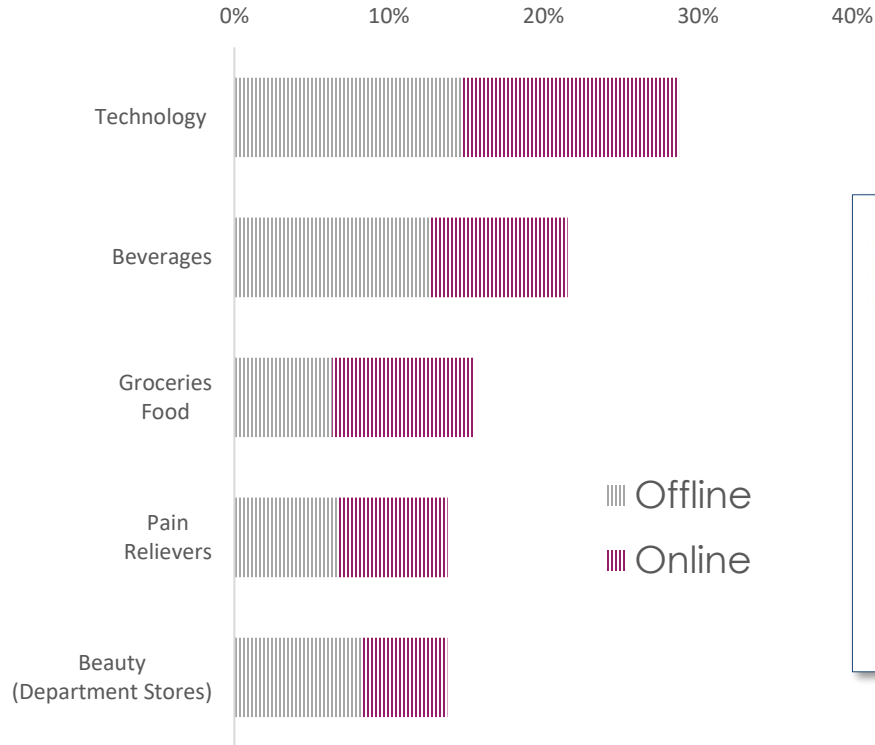
of sales come from Face-to-Face conversations



9%

of sales come from Online Social Media

By Category



MIT Sloan
Management Review

MARKETING STRATEGY

Deriving Value From Conversations About Your Brand

Research shows that both online and off-line customer conversations drive purchase decisions — but they require separate marketing strategies.

BY ANDREW FOX, CHRISTOPHER WELLS, LAWRENCE WELLS, AND ANDREW WELLS

Nowhere else, the Seattle-based retailer had a more visible 2017. In early February, Israeli Shraga Shraga from the newly opened U.S. promotion center in Boston to become a business for shopping for the first time in a long time. The next day, he was off a powerful machine in a small studio. One search showed the number of words mentioned of the Shraga brand on Twitter and other sites ranged by 1,700%, while the size of those conversations increased using natural language processing, which interprets meaning from online words and context, saving Shraga from product marketing. However, if the conversation (measured in terms), the sentiment was positive. Despite their initial negative reactions, Shraga's 2017 holiday season with a 2.7% sales increase over the prior year.

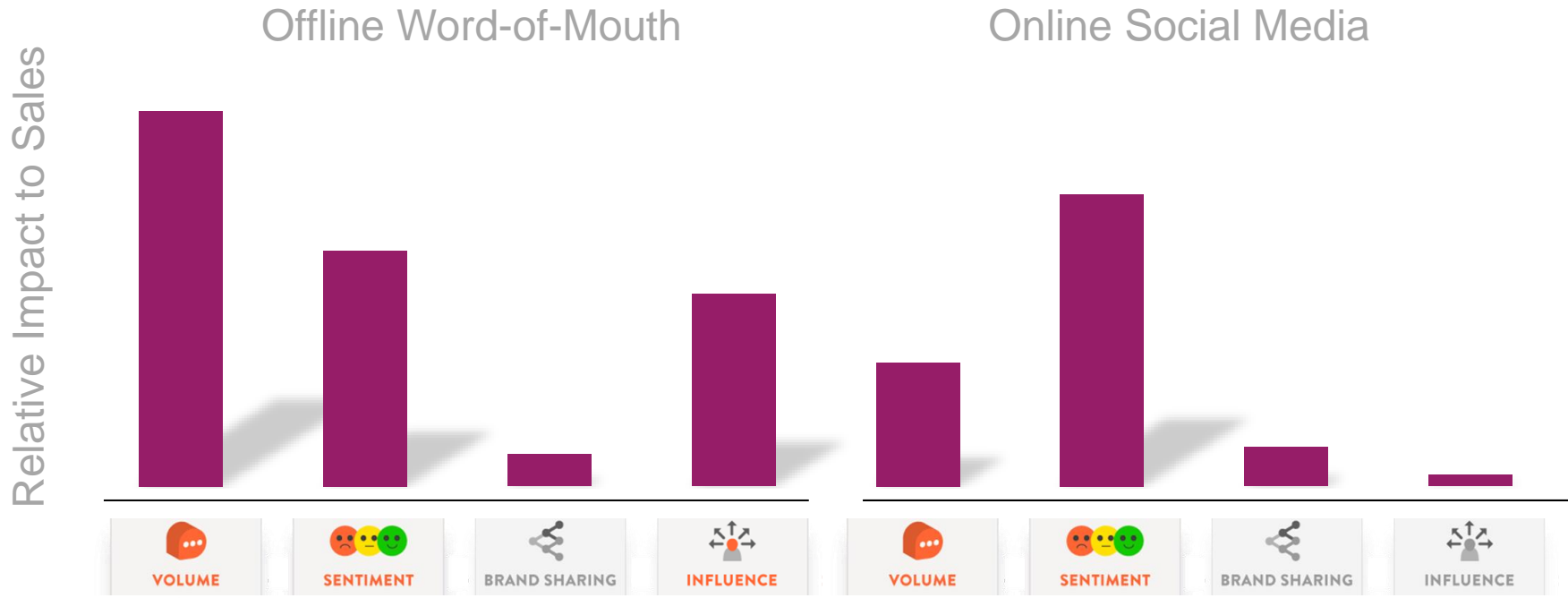
Emergent conversations about brands are high volume — and are only for brands that get caught up in conversations. Indeed, we studied more than 100 leading consumer brands and found that in most cases there is little correlation between what consumers said about the brand online and what they said off-line, even though both lines of conversation can have big effects on a company's sales.

Marketers have long recognized word-of-mouth as a powerful force affecting how well products



WINTER 2014 MIT SLOAN MANAGEMENT REVIEW 1

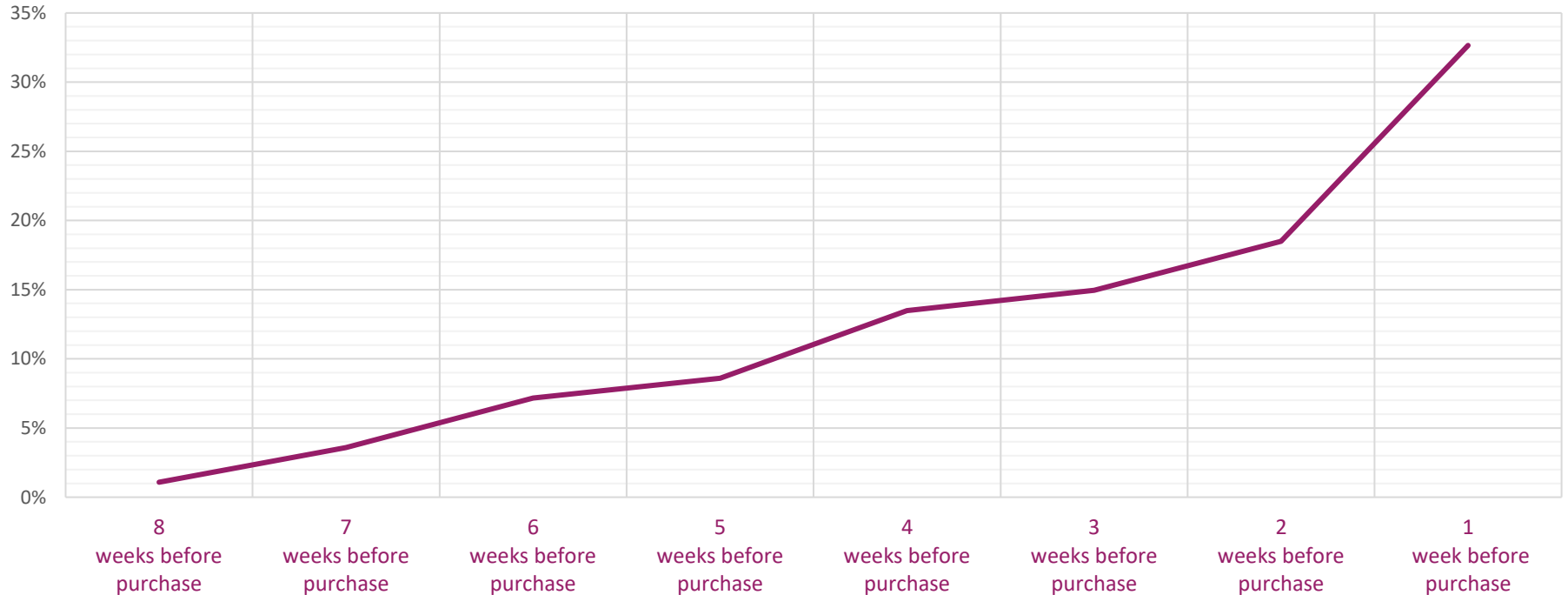
On average, volume most impactful for offline **and** sentiment for online



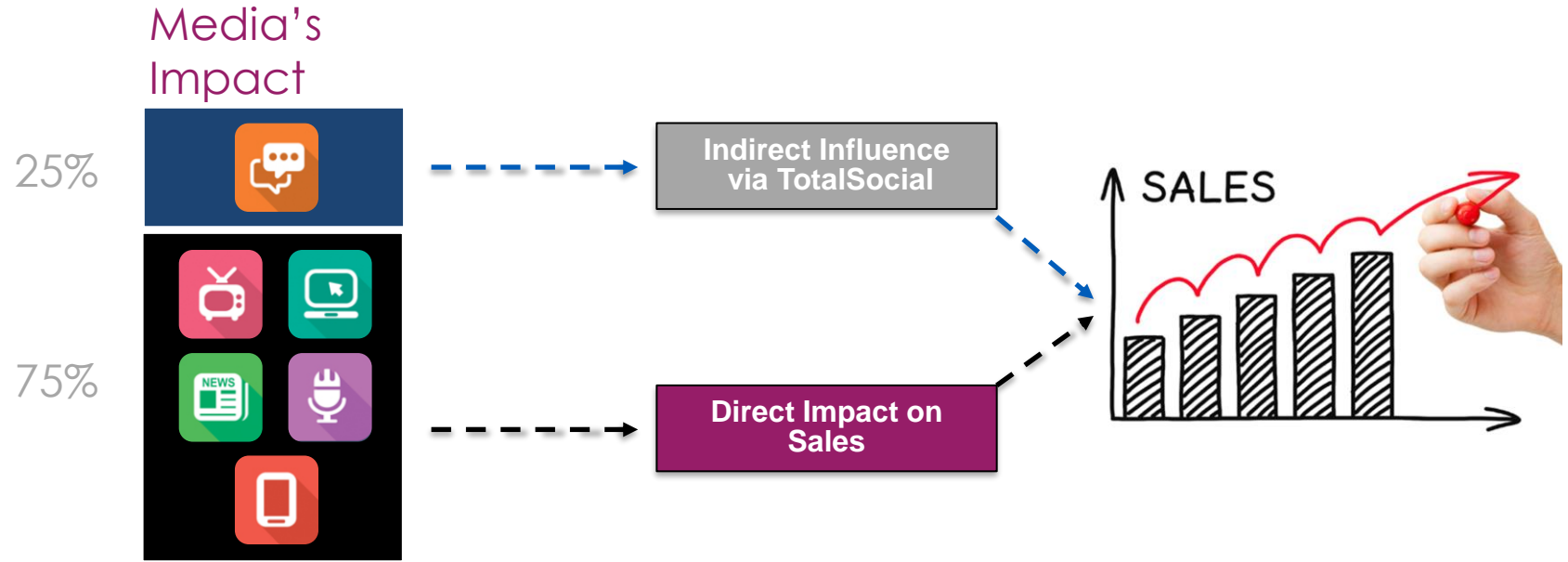
Volume is the total amount of conversations about a brand

Conversation impact starts ~8 weeks before the sale and accelerates closer to the purchase

Impact of Conversations on Sales



Media stimulates conversation which in turn stimulates sales



Optimize social strategy by **excelling online & offline**

Conversation to sales attribution is **19%** on average

Virtually **no correlation** between the offline and online!

Volume most impactful for offline; sentiment for online...

25% of media's impact comes through conversations.

More & better conversations leads to big potential **increase in the bottom line**

Conversations are your asset, don't let them languish.



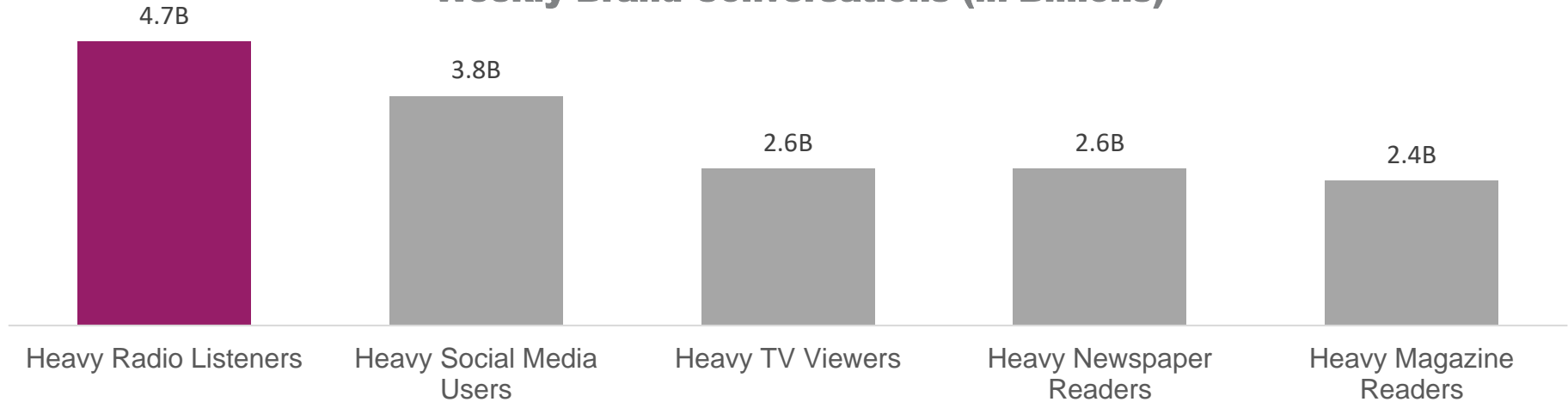
Radio as a driver of **brand conversations**

THIS!
IS RADIO

Radio is the social medium

Heavy radio listeners have more brand conversations than users of other media, including TV and social media

Weekly Brand Conversations (in Billions)



DEFINING HEAVY USERS OF MEDIA:

Heavy Radio: 2+ hours per day on weekday or weekend

Heavy Social Media: 2+ hours per day on weekday and weekend

Heavy TV: 2+ hours of per day on weekday and weekend

Heavy Newspaper: 1+ hours per day on weekday or weekend

Heavy Magazine: 1+ hours per day on weekday or weekend

Radio ranks #1 in brand conversations

Across all 15 industries and sectors



Breadth of
Industry Sectors
Measured by
Engagement Labs

Sports	Food & Dining	Beauty & Personal Care
Financial	Beverages	Healthcare
Media & Entertainment	Travel	Retail/Apparel
Technology	Auto	Children's Products
Household Products	Telecom	The Home

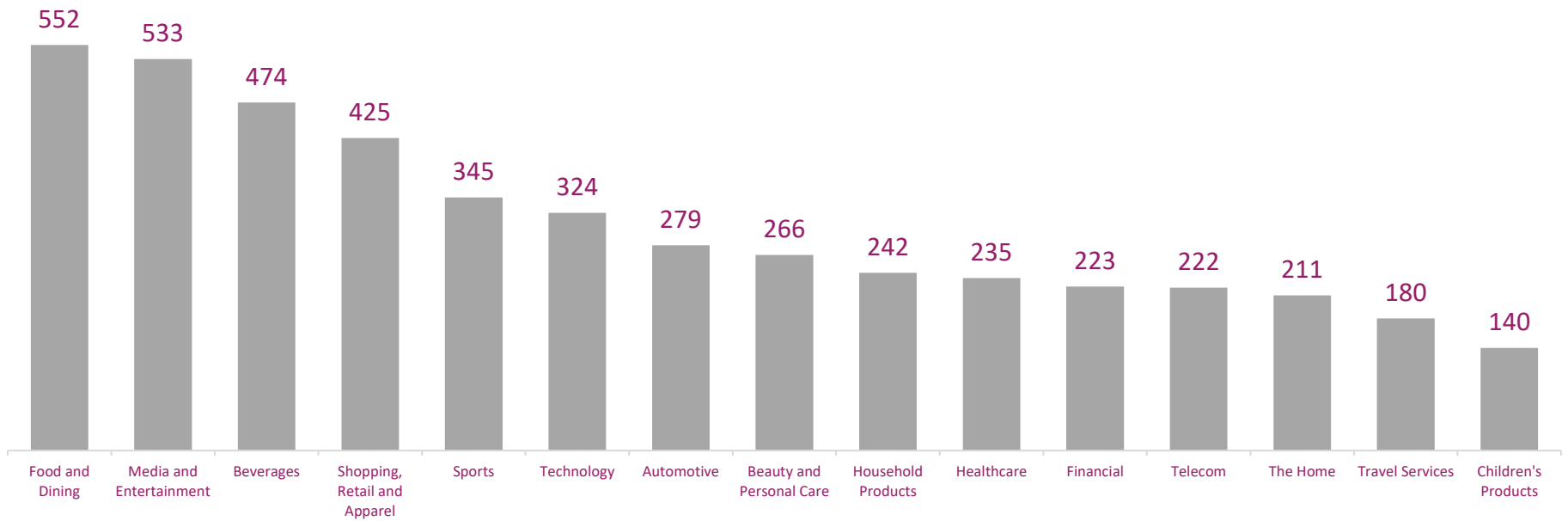
Heavy Radio Listeners
have more brand
conversations across all
categories than heavy
consumers of:

TV
Social Media
Magazines
Newspapers

Radio listeners buzz across categories

Heavy radio listeners rank #1 in every category vs. TV, Social Media, Magazine and Newspaper

Projected Weekly Brand Conversations (in Millions)



Source: Engagement Labs TotalSocial, August 2022 – July 2023

Source: Engagement Labs, 2023: TotalSocial (online survey) August 2022-July 2023, P13-69



Radio listeners are influential...

Heavy radio listeners are more likely to be everyday consumer influencers

*vs the Avg
Person*

+25%

*vs Heavy
TV Viewers*

+23%

*vs Heavy Social
Media Users*

+4%

The Value of Everyday Influencers:

- **“Reach Effect”**
They talk about more brands with people
- **“Acceleration Effect”**
They keep up with what’s new and spread the word
- **“Amplification Effect”**
They talk about advertising, so your message goes further

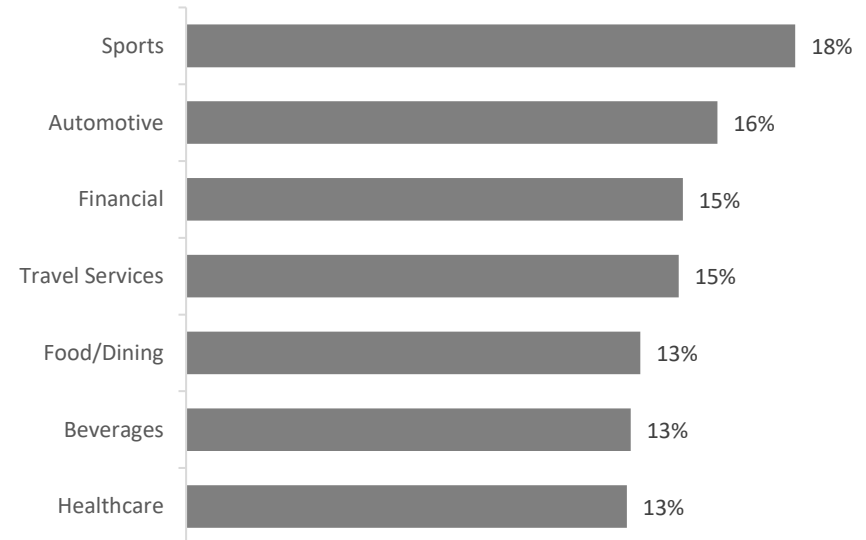
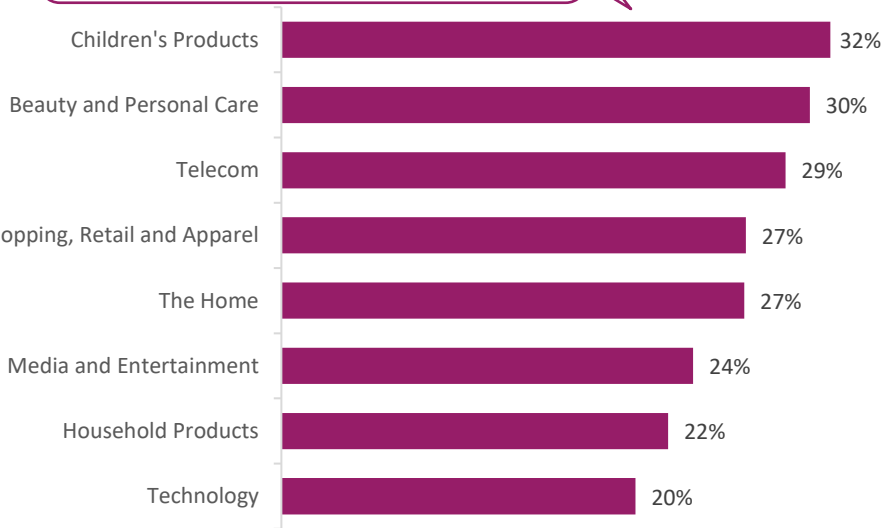
We identify the influential consumers who represent ~10% of the total public and may engage in 2-3x as many brand conversations as others

Listeners are influencers in key verticals **when compared to tv**

How Much More Likely Are Heavy Radio Listeners to be Category Influencers Compared to Heavy TV Viewers...

Heavy Radio Listeners are 32% more likely than Heavy TV Viewers to be Children's Products Influencers

Radio vs. TV



Source: Engagement Labs TotalSocial, August 2022 – July 2023; Ranked by Difference vs Heavy TV Viewers

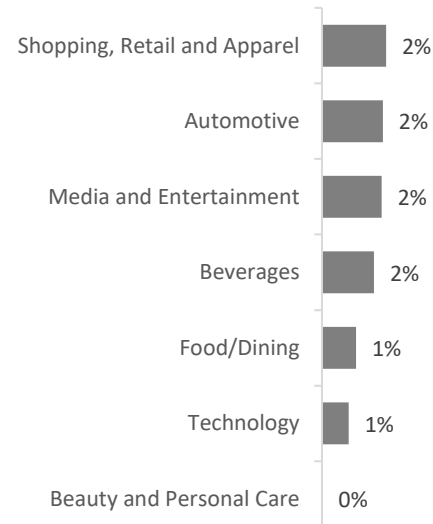
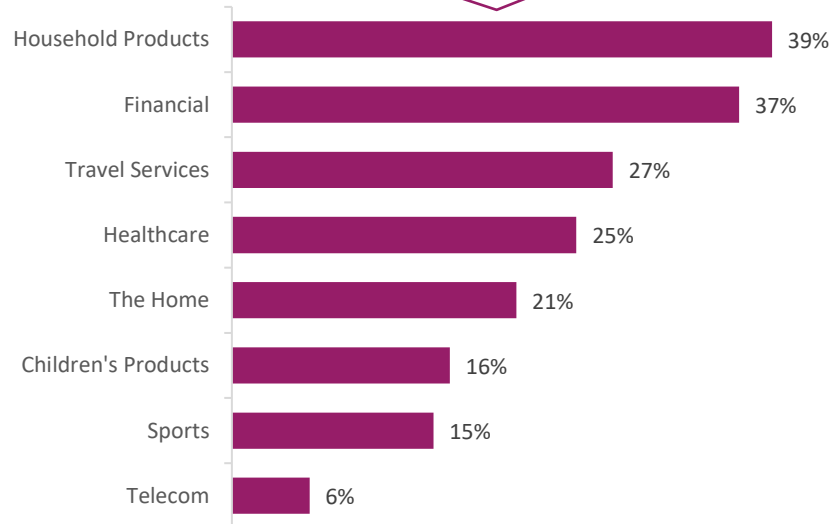
Source: Engagement Labs, 2023: TotalSocial (online survey) August 2022-July 2023, P13-69

Listeners are influencers in key verticals **when compared to social media**

How Much More Likely Are Heavy Radio Listeners to be Category Influencers Compared to Heavy Social Media Users

Heavy Radio Listeners are 39% more likely than Heavy Social Media Users to be Household Products Influencers

Radio vs. Social Media



Source: Engagement Labs TotalSocial, August 2022 – July 2023; Ranked by Difference vs Heavy TV Viewers

Source: Engagement Labs, 2023: TotalSocial (online survey) August 2022-July 2023, P13-69

Radio leads to **purchase**

More than half of brand conversations among heavy radio listeners lead to purchase intent.

51%

Of brand conversations
among Heavy Radio Listeners
result in

Intent to purchase

That's ahead of the national
avg. (49%)

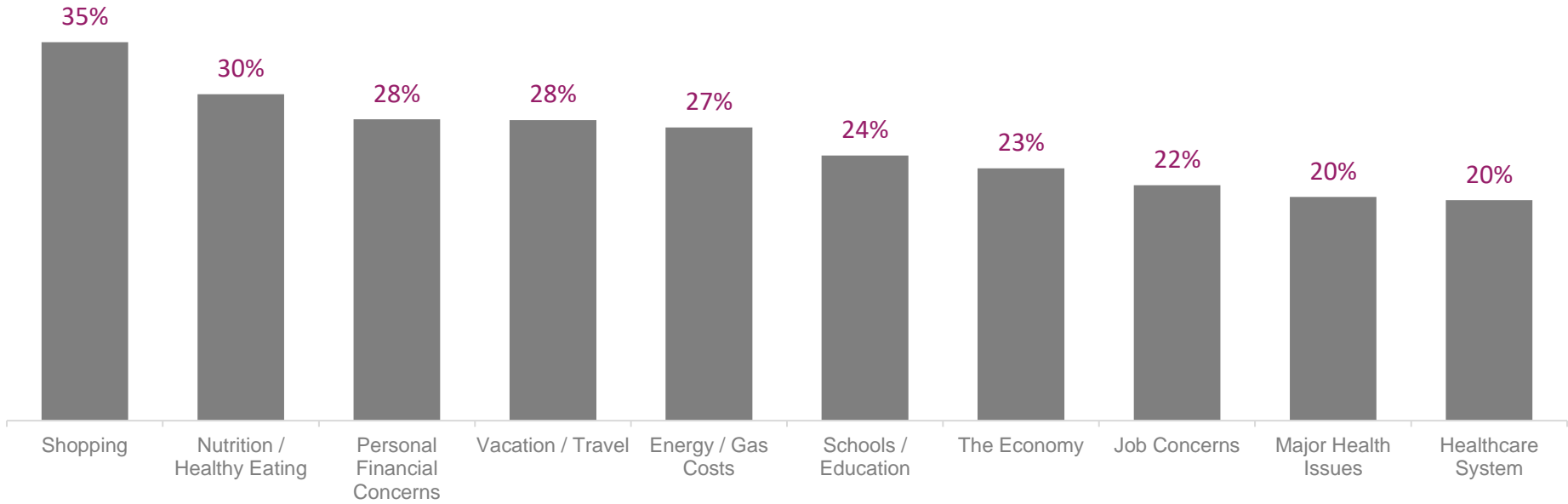


Radio performs particularly well in:

- Auto +14%
- Sports +13%
- Telcom +10%
- Technology +9%
- Beverages +5%
- Healthcare +5%

Heavy radio listeners are concerned about a **diverse** range of issues

Leading Issues Discussed Among Heavy Radio Listeners

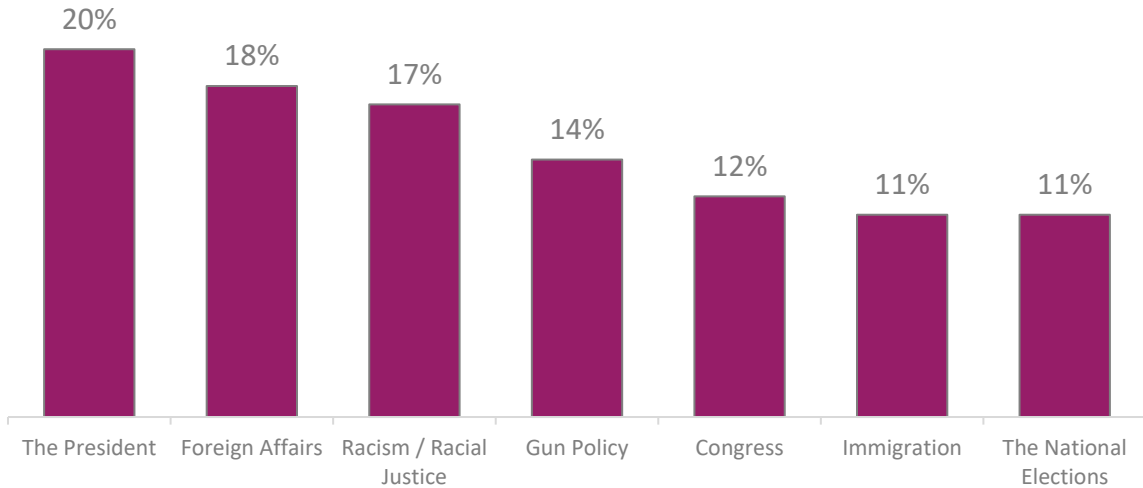


Source: Engagement Labs TotalSocial, August 2022 – July 2023

Source: Engagement Labs, 2023: TotalSocial (online survey) August 2022-July 2023, P13-69

They also have strong opinions on political issues

% of Heavy Radio Listeners Discussing Political Issues



Source: Engagement Labs TotalSocial, August 2022 – July 2023

Making the case for **the power of radio**

Heavy radio listeners rank #1 in every category vs. TV, Social Media, Magazine and Newspaper; delivering powerful results for advertisers.

- Nearly **5 billion** weekly brand conversations
- **More** brand conversations than heavy TV viewers, social media users, magazine readers and newspaper readers
- A compelling story for radio across **all verticals**
- **Influential** everyday consumers
- Their brand conversations lead to **purchase**
- Concerned with a wide array of hot-button **issues**, including political

Making the Case for the Power of Radio

Client Case Study

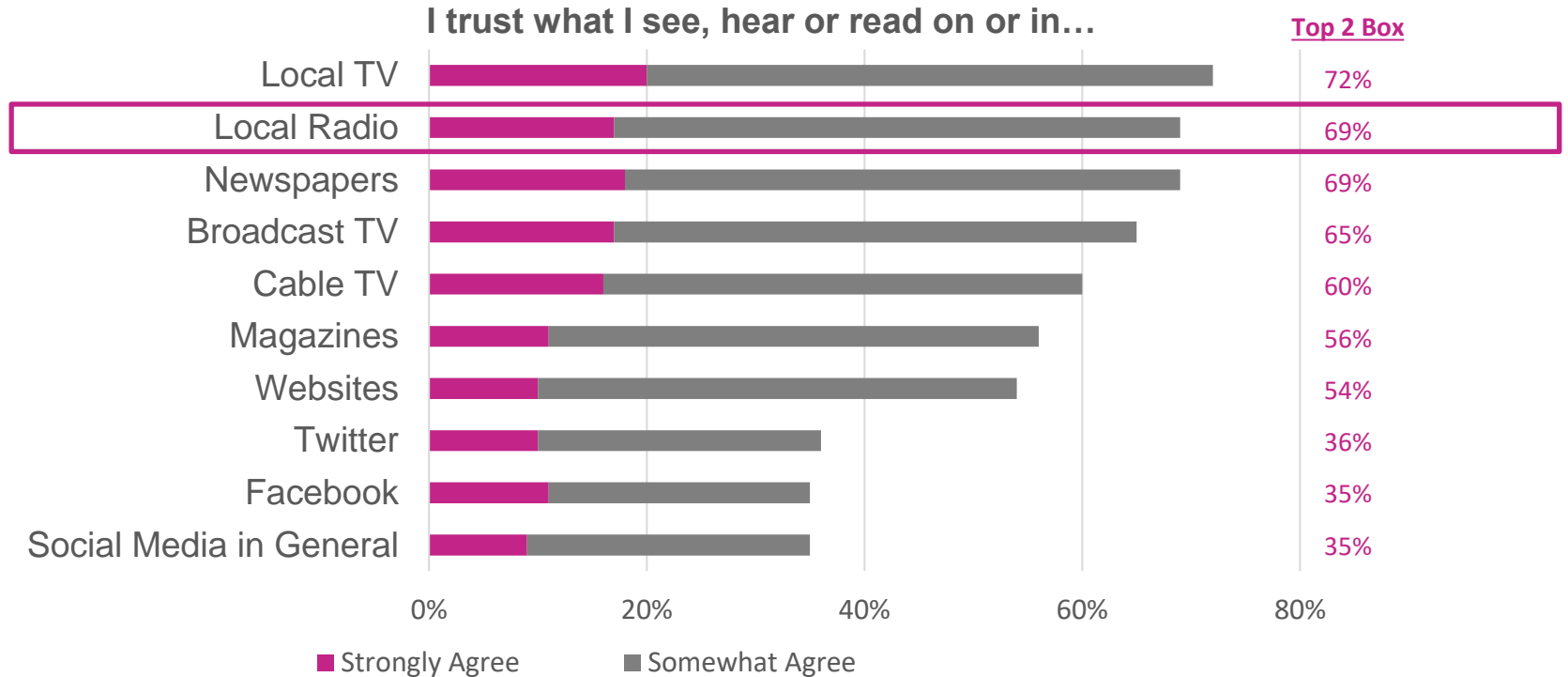
Study goals

Amidst growing dissatisfaction with social media among advertisers, radio commissioned a study focused on trust, engagement and brand conversations.

1. The trustworthiness of radio compared to other media, particularly social media
2. The power of the radio audience, as measured by the volume of weekly brand conversations and concentration of everyday influencers among Heavy Radio Listeners vs Heavy Internet Users and Heavy TV Viewers
3. The historical and current sentiment for Facebook, Twitter and Instagram to make the case that there is more advocacy for advertisers from radio than social media

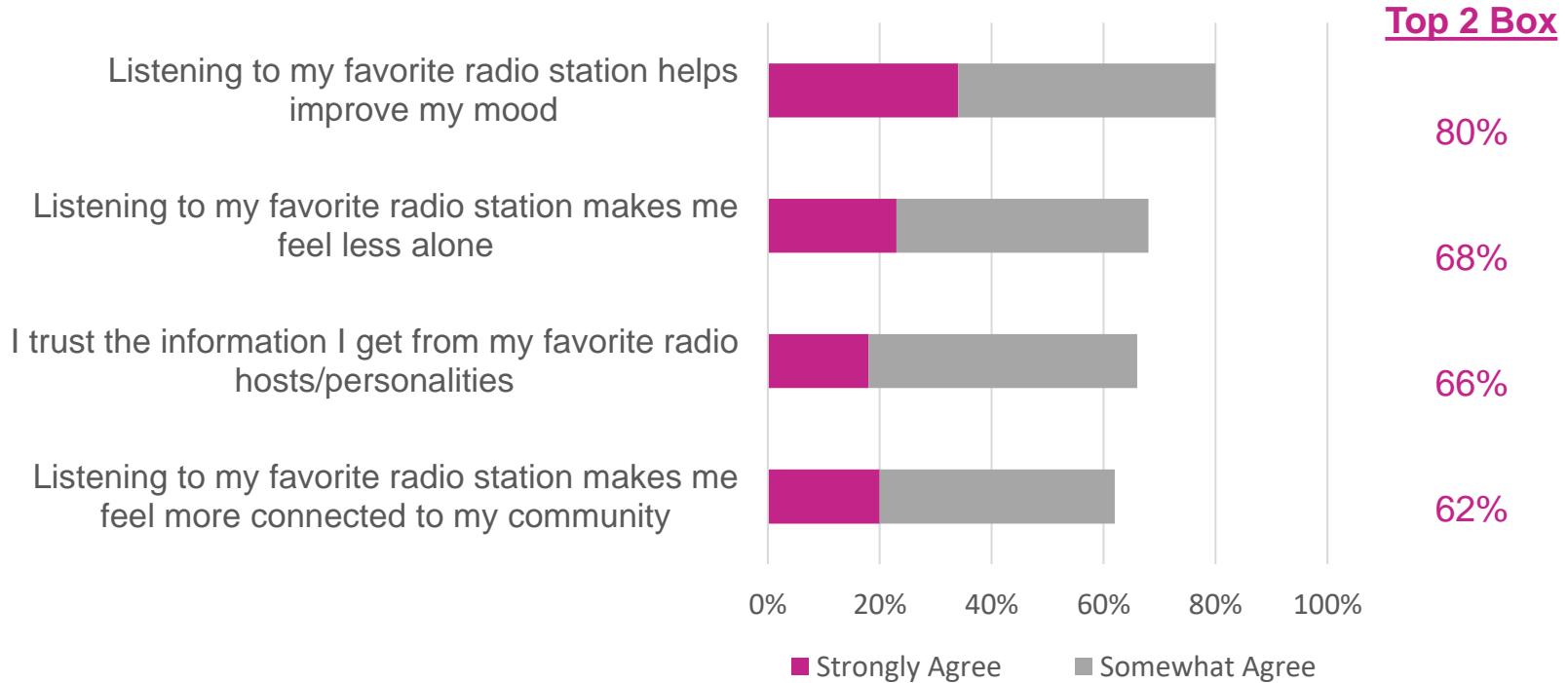
Radio is highly trusted

Performing far ahead of social media



Majority agree with the many **benefits of radio**

Those include improves mood, makes you feel less alone, connected to your community and trustworthy radio personalities.



Key findings

1. **Radio is highly trusted**, far more so than social media, which has become much less trustworthy over the last year
2. **Radio delivers tangible benefits to listeners**, with an overwhelming majority citing that it improves their mood, helps them feel less isolated and more connected to their community
3. **Heavy radio listeners wield tremendous word of mouth power for advertisers**, having more brand conversations and more influential than heavy internet users and TV viewers
4. **Sentiment for Facebook and Twitter has been plummeting** in recent months; even Instagram is undergoing steady decline in offline sentiment

What This Means?

In a time when both consumer and advertiser affinity towards social media is eroding, radio continues to earn consumers' trust and deliver an audience that is highly engaged in brand conversations, which we know are a driver of sales.

Radio's ability to generate a lift in conversations for current advertisers should be a key reporting KPI when evaluating success of an ad campaign, and a key selling point for prospects

Radio Campaign Effectiveness

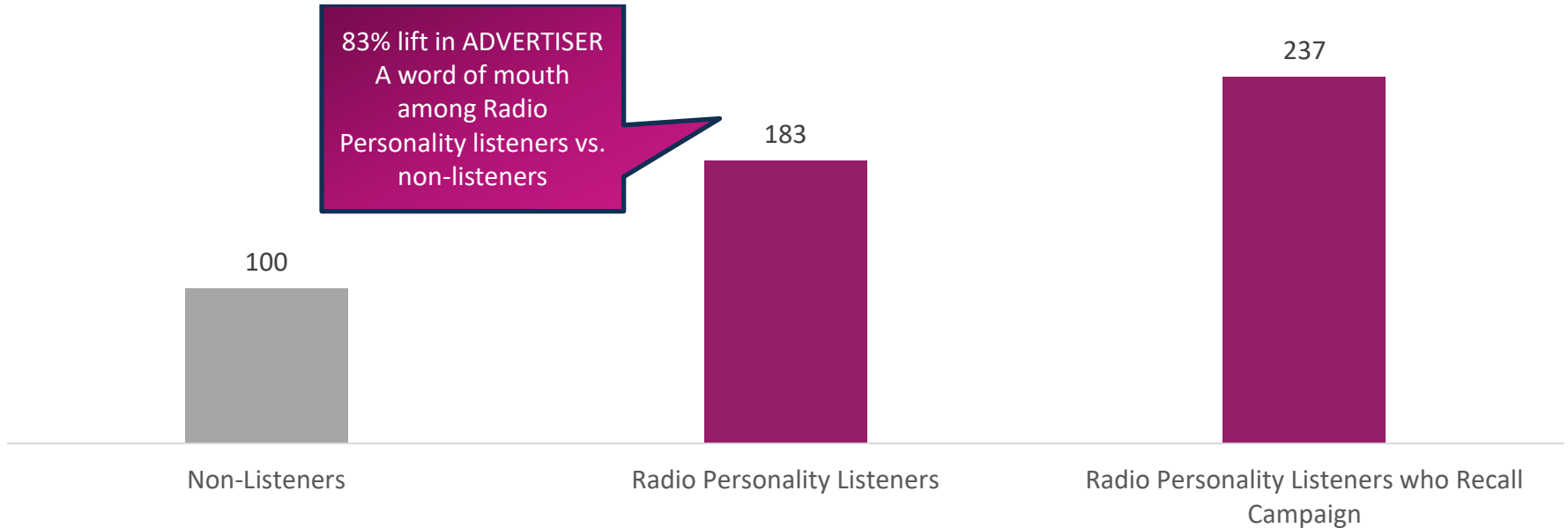
Client Case Study

Beverage brand enjoyed massive lifts

In conversion volume among radio personality listeners.

% Talking About BEVERAGE ADVERTISER During the Past 7 Days

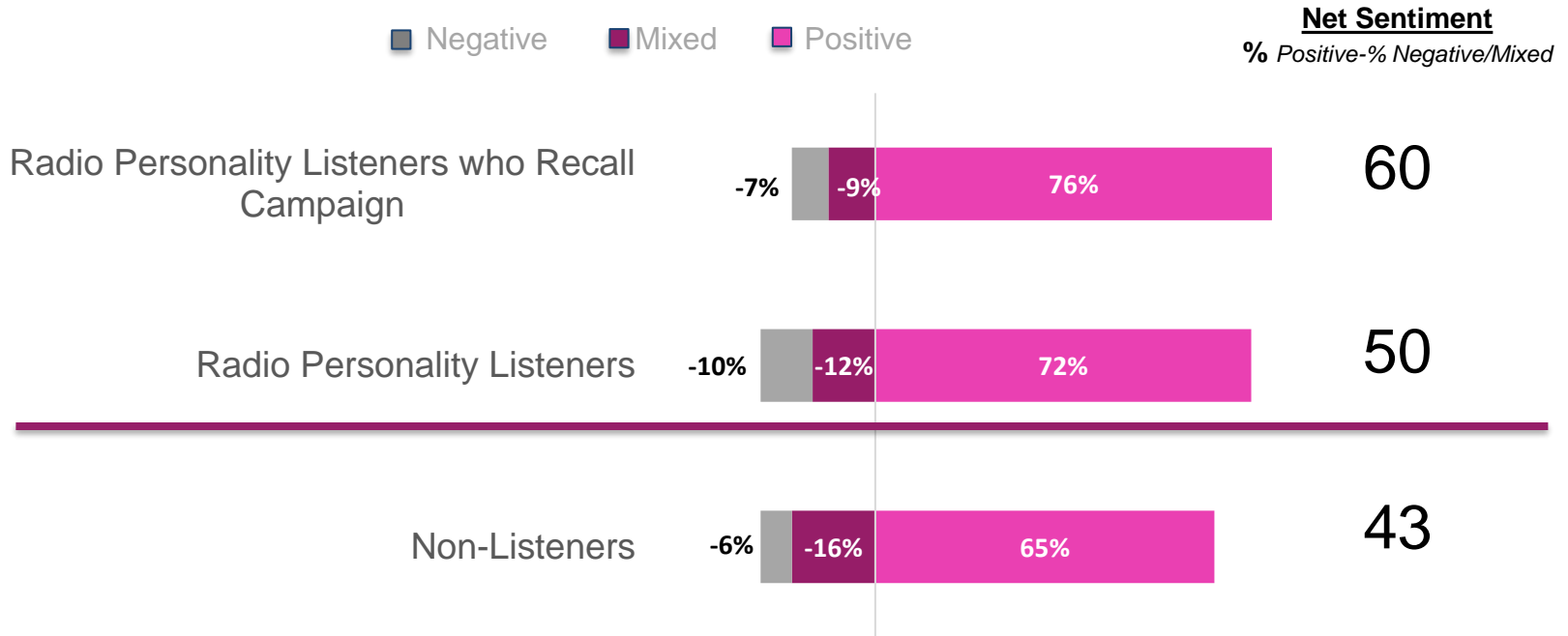
Indexed to Non-Listeners



Beverage brand achieved higher sentiment

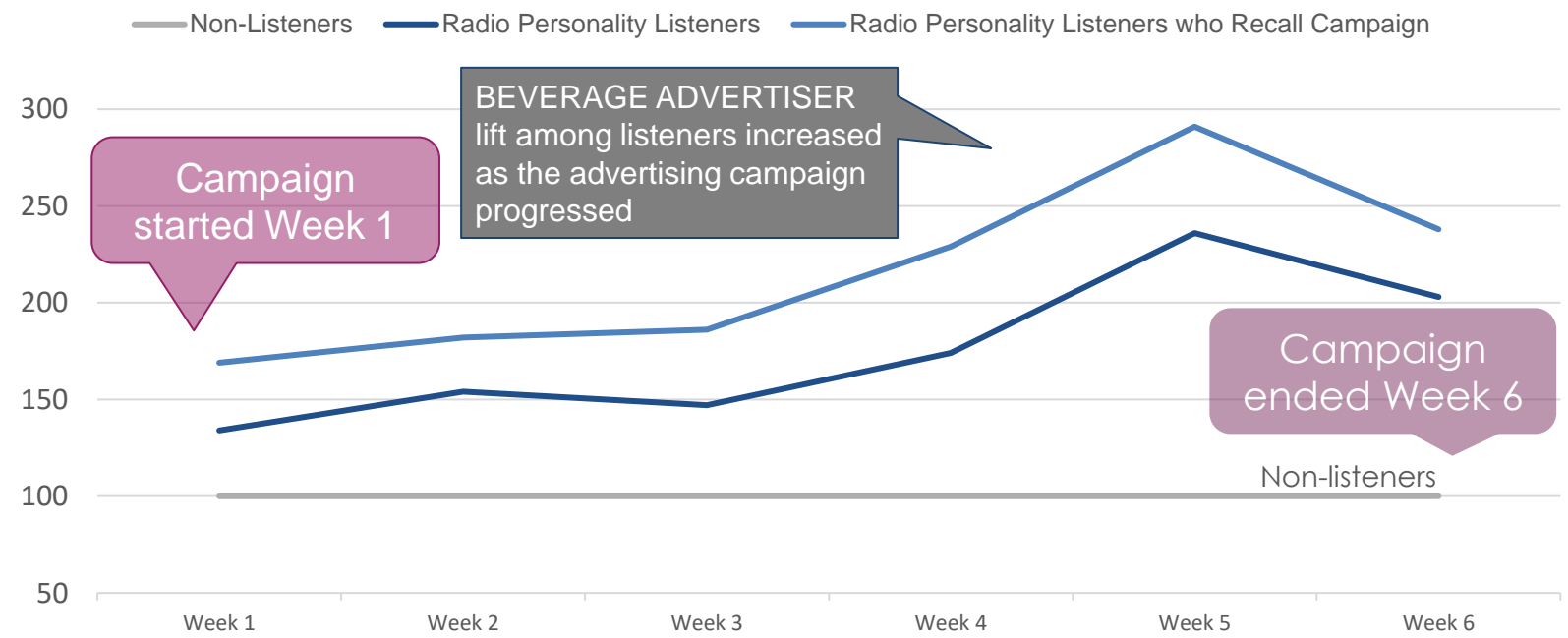
Among radio personality listeners who recalled campaign.

Offline BEVERAGE ADVERTISER Sentiment among RADIO PERSONALITY Listeners



Lift in conversation during campaign

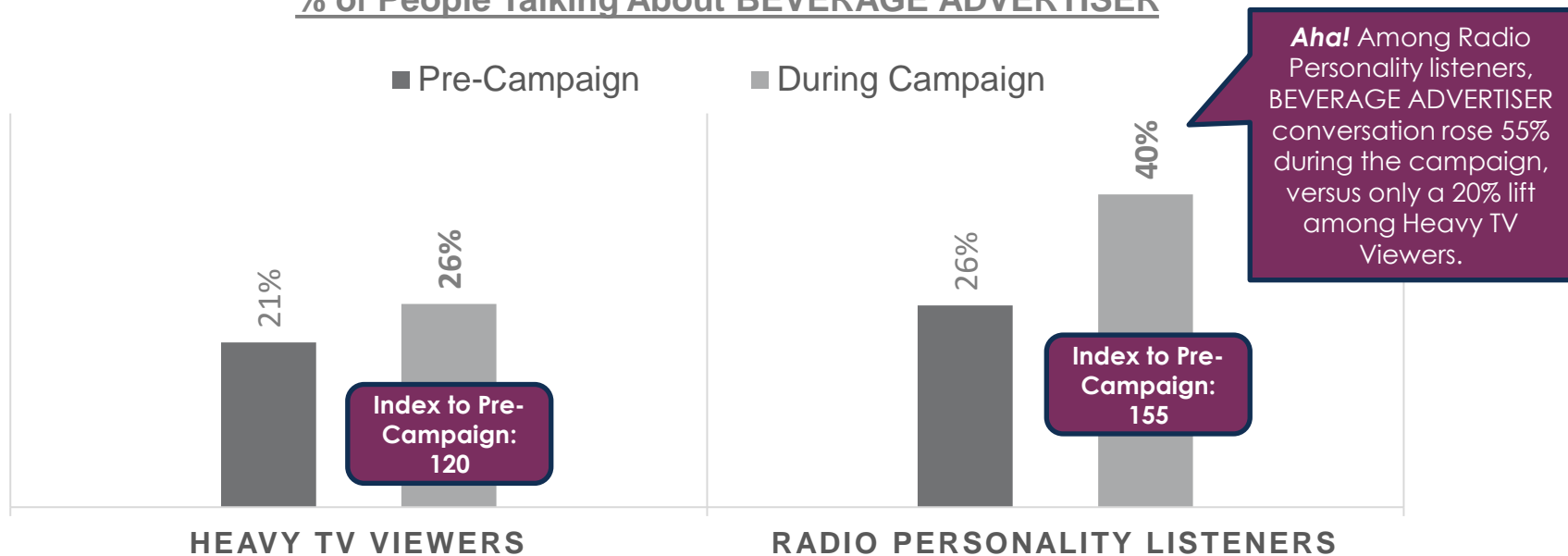
% Talking About BEVERAGE ADVERTISER During the Past 7 Days
Indexed to Non-Listeners



Base: Average Two-Week Period
Source: TotalSocial

Radio outperformed TV for beverage advertiser

% of People Talking About BEVERAGE ADVERTISER



Key takeaways

Radio delivers results for brand advertisers, with more brand conversations than Heavy TV Viewers, and a highly influential audience

Beverage advertiser enjoyed a substantial performance lift among Radio Personality listeners

- Beverage advertiser conversations had an +80% lift among Radio Personality listeners during the entire campaign period versus non-listeners.
- beverage advertiser enjoyed markedly better sentiment among Radio Personality listeners who recalled the campaign.

Campaign sparked dramatic increase in beverage advertiser conversations among Radio Personality listeners versus the prior period and vs Heavy TV Viewers

- Beverage advertiser enjoyed a 55% increase in volume of talk from the pre-wave period among Radio Personality listeners (vs. the 10% increase seen for non-listeners)
- Radio listeners outperformed TV viewers for beverage advertiser during the campaign

ABOUT ENGAGEMENT LABS

AWARD WINNING DATA & ANALYTICS FIRM

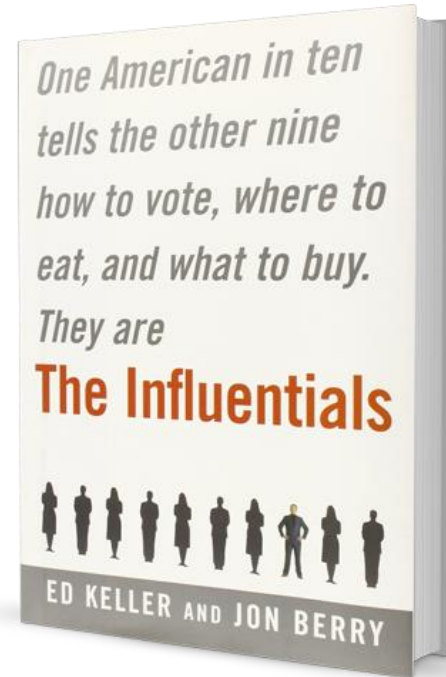
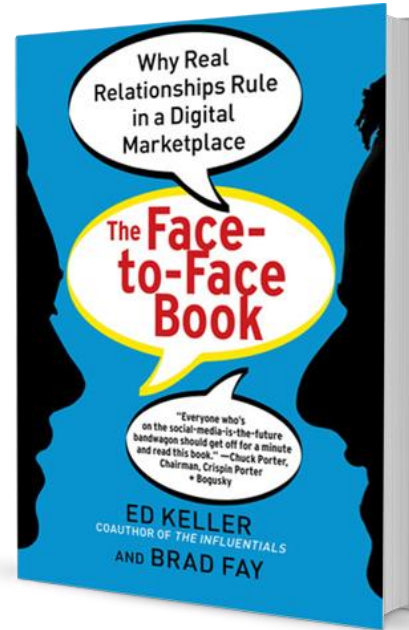
- Provides Fortune 500 companies with unique Social Intelligence

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- Best-selling authors

TOTALSOCIAL® PLATFORM

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