The Medium Moves The Message

A Comparative Assessment of Advertising from Broadcast to Podcast
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MARCH 2023
Methodology

- In February 2023, Sounds Profitable commissioned **Signal Hill Insights** to conduct an online survey of 2,002 Americans 18+, to gauge their awareness, consideration, favorability, and other brand measures relative to the largest advertisers in TV, Radio, and Podcasting.

- Specifically, we looked at five leading advertisers in 2022 by share of voice in each of the three channels, as sourced from published data from iSpot (TV) and Media Monitors (Radio).

- Podcast data was graciously provided by **Magellan.AI**

- For all brands, various measures were compared between weekly users and non-users of each platform.

- Respondents were also asked a series of questions about their perceptions of advertising in each channel.

- Sample demographics weighted to US Census data for Americans 18+. 
Our special guests

TV Brands
Top brands in TV advertising by share of voice, 2022, as published by iSpot

Radio Brands
Top brands in Radio advertising by share of voice, 2022, as published by Media Monitors

Podcast Brands
Top brands in podcast advertising by share of voice, 2022 – sourced exclusively from Magellan.AI
Broadcast and Podcast Audiences are pulling apart.

The reach of podcasting is growing, especially with younger demos.
Podcasting reaches nearly as many 18-34s as Radio/TV

% of each age group consuming media in last week

<table>
<thead>
<tr>
<th>Age 18-34</th>
<th>Podcasts</th>
<th>AM/FM</th>
<th>TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>50%</td>
<td>59%</td>
<td>54%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age 35-54</th>
<th>Podcasts</th>
<th>AM/FM</th>
<th>TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>39%</td>
<td>71%</td>
<td>61%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age 55+</th>
<th>Podcasts</th>
<th>AM/FM</th>
<th>TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>14%</td>
<td>68%</td>
<td>74%</td>
<td></td>
</tr>
</tbody>
</table>
The reach of podcasting is growing, especially with younger demos.

There is nearly a generation separating podcast from broadcast audiences.
Audience Composition: Podcasts vs. AM/FM vs. TV

Mean Age:

- US population: 47.8
- Podcasts: 39.7
- AM/FM: 48.8
- TV: 50.3

Past week users of each media type:

- Age 55+
- Age 35-54
- Age 18-34

- Podcasts:
  - 16% Age 55+
  - 39% Age 35-54
  - 44% Age 18-34

- AM/FM:
  - 39% Age 55+
  - 35% Age 35-54
  - 26% Age 18-34

- TV:
  - 44% Age 55+
  - 31% Age 35-54
  - 25% Age 18-34
Time Spent Using Podcasts, AM/FM & TV

Hours/ past week of past week users

Podcasts
- <1 hr: 22%
- 1-<2 hrs: 24%
- 2-<5 hrs: 28%
- 5-<10 hrs: 16%
- 10-<20 hrs: 6%
- 20+ hrs: 4%

AM/FM
- <1 hr: 28%
- 1-<2 hrs: 26%
- 2-<5 hrs: 22%
- 5-<10 hrs: 14%
- 10-<20 hrs: 6%
- 20+ hrs: 4%

TV
- <1 hr: 5%
- 1-<2 hrs: 7%
- 2-<5 hrs: 16%
- 5-<10 hrs: 19%
- 10-<20 hrs: 21%
- 20+ hrs: 31%

Heavy users: 10%

Sponsored by

[Brands logos]
Heavy users of Podcasting are nearly a generation younger than heavy Radio/TV users

<table>
<thead>
<tr>
<th>Medium</th>
<th>Mean Age</th>
<th>18-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>US population</td>
<td>47.8</td>
<td>29%</td>
<td>33%</td>
<td>38%</td>
</tr>
<tr>
<td>Podcasts</td>
<td>37.0</td>
<td>50%</td>
<td>40%</td>
<td>10%</td>
</tr>
<tr>
<td>AM/FM</td>
<td>56.3</td>
<td>12%</td>
<td>60%</td>
<td>29%</td>
</tr>
<tr>
<td>TV</td>
<td>58.7</td>
<td>7%</td>
<td>66%</td>
<td>28%</td>
</tr>
</tbody>
</table>

Heavy Users: Podcast/pst wk 5hrs+; Radio/pst wk 10hrs+; TV/pst wk 20hrs+
The reach of podcasting is growing, especially with younger demos.

There is nearly a generation separating podcast from broadcast audiences.

...and the podcasting audience is increasingly becoming less reachable by broadcast media.
Exclusive Reach – 18+

Additional % of podcast listeners not using AM/FM or TV in the past week

Used in past week

AM/FM

Podcasts + 12% exclusive reach

TV

Podcasts + 11% exclusive reach

12

11
Exclusive Reach - 25-54

Additional % of podcast listeners not using AM/FM or TV in the past week

- Used in past week
  - Podcasts
    - AM/FM
      - + 12% exclusive reach
    - TV
      - + 15% exclusive reach

- Used in past week
  - Podcasts
    - Exclusive reach
Exclusive Reach – 18-34

Additional % of podcast listeners not using AM/FM or TV in the past week

- Used in past week
  - Podcasts
    - +18% exclusive reach

- Used in past week
  - Podcasts
    - +19% exclusive reach

- AM/FM
- TV
How are these differences impacting brands and advertising?
Podcast listeners much more likely than TV or AM/FM users to support brands that support their favorite shows

Do you go out of your way to support brands that support your...?

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Past week users, % agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favorite podcast(s)</td>
<td>60%</td>
</tr>
<tr>
<td>Favorite network/cable TV show(s)</td>
<td>48%</td>
</tr>
<tr>
<td>Favorite AM/FM radio show(s)</td>
<td>43%</td>
</tr>
</tbody>
</table>
Podcast listeners more likely than TV viewers or AM/FM listeners to say ads prompt purchase

% Agree that “the ads on this media make me more likely to purchase products/services advertised”

- Podcast ads: 43%
- Network/Cable TV ads: 33%
- AM/FM Radio ads: 26%

Past week users of each media type
Podcast ads hold consumer’s attention better than AM/FM or TV ads

% Always/often pay attention to ads when using this media

- **Podcasts**: 36%
- **Network/Cable TV**: 31%
- **AM/FM Radio**: 29%

Past week users of each media type
Consumers most likely to consider brands they hear about on podcasts

| Media                      | % Agreeing
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Podcasts</td>
<td>68%</td>
</tr>
<tr>
<td>YouTube/Online Video</td>
<td>62%</td>
</tr>
<tr>
<td>Social Media</td>
<td>61%</td>
</tr>
<tr>
<td>Live or Recorded TV</td>
<td>54%</td>
</tr>
<tr>
<td>AM/FM</td>
<td>49%</td>
</tr>
</tbody>
</table>

Past week users of each media; recalled hearing ad on media.
Consumers find podcast ads to be most relevant

% agreeing that "the ads I hear/see on this media are generally relevant to me"

- Podcasts: 61%
- Social Media: 59%
- YouTube/Online Video: 54%
- Live or Recorded TV: 41%
- AM/FM: 40%

Past week users of each media; recalled hearing ad on media
There are benefits that are native to podcasting, like engagement and intimacy.

These factors alone do not completely account for the efficacy of podcast ads.

Even using similar creative executions across platforms, Progressive and GEICO showed better performance in podcasting.
For omnichannel insurance brands, Podcasts outperform AM/FM and TV in mid-funnel metrics with single-channel consumers.

<table>
<thead>
<tr>
<th></th>
<th>Progressive</th>
<th>Geico</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV-only</td>
<td>34%</td>
<td>32%</td>
</tr>
<tr>
<td>AM/FM-only</td>
<td>37%</td>
<td>36%</td>
</tr>
<tr>
<td>Podcast-only</td>
<td>39%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Favorability: Very/somewhat favorable

Used medium in past week, did not use other two media in same period.
For omnichannel insurance brands, Podcasts outperform AM/FM and TV in mid-funnel metrics with single-channel consumers.

Consideration
Very/somewhat likely to use

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Very Likely</th>
<th>Somewhat Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV-only</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>AM/FM-only</td>
<td>31%</td>
<td>26%</td>
</tr>
<tr>
<td>Podcast-only</td>
<td>36%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Used medium in past week, did not use other two media in same period
But *why* do podcast ads work?

Podcast listeners are less saturated with ads in general – spot loads are lighter, and many podcasts are commercial-free.
Seen or Heard an Ad in the Past Week

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Past week users (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network/Cable TV</td>
<td>63%</td>
</tr>
<tr>
<td>AM/FM</td>
<td>63%</td>
</tr>
<tr>
<td>Social Media</td>
<td>61%</td>
</tr>
<tr>
<td>YouTube/Online Video</td>
<td>58%</td>
</tr>
<tr>
<td>Podcasts</td>
<td>55%</td>
</tr>
</tbody>
</table>

Past week users of each media type
But *why* do podcast ads work?

Podcast listeners are less saturated with ads in general – spot loads are lighter, and many podcasts are commercial-free.

Podcast listeners are also more like to watch and listen to ad-free/premium entertainment.
Podcast listeners more likely to consume ad-free on-demand media

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Total</th>
<th>Podcasts Past Week</th>
<th>Heavy Podcast Listeners – 5+ hrs/past week</th>
</tr>
</thead>
<tbody>
<tr>
<td>Premium TV Streaming Services - no ads</td>
<td>70%</td>
<td>84%</td>
<td>83%</td>
</tr>
<tr>
<td>Paid Music Streaming Services - no ads</td>
<td>41%</td>
<td>63%</td>
<td>73%</td>
</tr>
<tr>
<td>Audiobooks</td>
<td>15%</td>
<td>32%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Past week users of each media type
Podcasts more likely than other digital or analog media to reach ad-free, on-demand consumers

% accessed paid TV streaming, paid music streaming or audio books/ past week

- Podcasts: 90%
- YouTube/Online Video: 82%
- Social Media: 79%
- AM/FM: 75%
- Network/Cable TV: 72%

Past week users of each media type
But *why* do podcast ads work?

- Podcast listeners are less saturated with ads in general – spot loads are lighter, and many podcasts are commercial-free.
- Podcast listeners are also more likely to watch and listen to ad-free/premium entertainment.
- Younger consumers are, by nature, more positive about brands in general, regardless of media platform.
Consumers who only or primarily use Podcasts rate brands more favorably, on average.

Average Favorability for All Brands with single-channel users:
- TV Only: 28%
- AM/FM Only: 32%
- Podcast Only: 34%

Average Favorability for All Brands by users’ primary channel:
- TV Primary: 37%
- AM/FM Primary: 37%
- Podcast Primary: 42%

“Only” = used medium in past week, did not use other two media in same period. Primary = used [medium] most in past week.
Favorable Opinion of each Brand

(aware of each brand)

- McDonald’s: 70%
- Domino’s: 68%
- Subway: 72%
- GEICO: 46%
- Progressive: 49%
- Liberty Mutual: 39%
- Indeed: 58%
- ZipRecruiter: 42%
- Shopify: 37%
- Babbel: 38%
- Upside: 52%
- BetterHelp: 56%
- Athletic Greens: 59%
## Favorable Opinion of each Brand

(18-34, aware of each brand)

<table>
<thead>
<tr>
<th>Brand</th>
<th>Favorability</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonald’s</td>
<td>75%</td>
</tr>
<tr>
<td>Domino’s</td>
<td>75%</td>
</tr>
<tr>
<td>Subway</td>
<td>71%</td>
</tr>
<tr>
<td>GEICO</td>
<td>51%</td>
</tr>
<tr>
<td>Progressive</td>
<td>51%</td>
</tr>
<tr>
<td>Liberty Mutual</td>
<td>43%</td>
</tr>
<tr>
<td>Indeed</td>
<td>66%</td>
</tr>
<tr>
<td>ZipRecruiter</td>
<td>49%</td>
</tr>
<tr>
<td>Shopify</td>
<td>48%</td>
</tr>
<tr>
<td>Babbel</td>
<td>45%</td>
</tr>
<tr>
<td>Upside</td>
<td>60%</td>
</tr>
<tr>
<td>BetterHelp</td>
<td>63%</td>
</tr>
<tr>
<td>Athletic Greens</td>
<td>65%</td>
</tr>
</tbody>
</table>

18-34s are an average of six percentage points higher on all brands for T2B favorability.
The Medium **Moves**

The Message

The Stars of the Show...The Brands
Total Awareness of each Brand

- McDonald’s: 95%
- Domino’s: 94%
- Subway: 93%
- Geico: 90%
- Progressive: 88%
- Liberty Mutual: 86%
- Indeed: 74%
- Zip Recruiter: 66%
- Shopify: 61%
- Babbel: 48%
- Upside: 26%
- Better Help: 20%
- Athletic Greens: 12%
Brand Metrics: Domino’s (among TV users)

Top Advertiser for TV

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Total Favorability (very/somewhat)</th>
<th>Total Consideration (very/somewhat likely to use)</th>
<th>Total Took Action (looked online/used/purchased)</th>
</tr>
</thead>
<tbody>
<tr>
<td>91%</td>
<td>62% 66% 67%</td>
<td>66% 67% 64%</td>
<td>82% 81% 77%</td>
</tr>
</tbody>
</table>

- Didn’t watch Network/Cable TV/ pst wk
- Watched Network/Cable TV/ pst wk
- Watched Network/Cable TV 20+hrs/ pst wk
Brand Metrics: Liberty Mutual (among TV users)

Top Advertiser for TV

<table>
<thead>
<tr>
<th>Metric</th>
<th>Did’t watch Network/Cable TV/ pst wk</th>
<th>Watched Network/Cable TV/ pst wk</th>
<th>Watched Network/Cable TV 20+hrs/ pst wk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness</td>
<td>80%</td>
<td>89%</td>
<td>93%</td>
</tr>
<tr>
<td>Total Favorability (very/somewhat)</td>
<td>28%</td>
<td>37%</td>
<td>38%</td>
</tr>
<tr>
<td>Total Consideration (very/somewhat likely to use)</td>
<td>20%</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Total Took Action (looked online/used/purchased)</td>
<td>20%</td>
<td>26%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Liberty Mutual Insurance

36
Brand Metrics: Progressive (among TV users)

Top Advertiser for TV

- Awareness: 86% (Didn't watch Network/Cable TV), 90% (Watched Network/Cable TV), 93% (Watched Network/Cable TV 20+hrs)
- Total Favorability: 39% (Didn't watch), 45% (Watched), 43% (Watched 20+hrs)
- Total Consideration: 33% (Didn't watch), 36% (Watched), 28% (Watched 20+hrs)
- Total Took Action: 42% (Didn't watch), 39% (Watched), 32% (Watched 20+hrs)
Brand Metrics: GEICO (among TV users)

Top Advertiser for TV

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Total Favorability (very/somewhat)</th>
<th>Total Consideration (very/somewhat likely to use)</th>
<th>Total Took Action (looked online/used/purchased)</th>
</tr>
</thead>
<tbody>
<tr>
<td>88%</td>
<td>39%</td>
<td>30%</td>
<td>36%</td>
</tr>
<tr>
<td>91%</td>
<td>43%</td>
<td>35%</td>
<td>39%</td>
</tr>
<tr>
<td>93%</td>
<td>42%</td>
<td>26%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Didn't watch Network/Cable TV/ pst wk

- GEICO

Watched Network/Cable TV/ pst wk

- GEICO

Watched Network/Cable TV 20+hrs/ pst wk

- GEICO
### Brand Metrics: Subway (among TV users)

#### Top Advertiser for TV

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Total Favorability (very/somewhat)</th>
<th>Total Consideration (very/somewhat likely to use)</th>
<th>Total Took Action (looked online/used/purchased)</th>
</tr>
</thead>
<tbody>
<tr>
<td>92%</td>
<td>65%</td>
<td>70%</td>
<td>86%</td>
</tr>
<tr>
<td>93%</td>
<td>68%</td>
<td>73%</td>
<td>84%</td>
</tr>
<tr>
<td>96%</td>
<td>70%</td>
<td>74%</td>
<td>85%</td>
</tr>
</tbody>
</table>

- **Awareness**: 92%, 93%, 96%
- **Total Favorability (very/somewhat)**: 65%, 68%, 70%
- **Total Consideration (very/somewhat likely to use)**: 70%, 73%, 74%
- **Total Took Action (looked online/used/purchased)**: 86%, 84%, 85%

For those who didn’t watch Network/Cable TV/pst wk:

- Awareness: 92%
- Total Favorability (very/somewhat): 65%
- Total Consideration (very/somewhat likely to use): 70%
- Total Took Action (looked online/used/purchased): 86%

For those who watched Network/Cable TV/pst wk:

- Awareness: 93%
- Total Favorability (very/somewhat): 68%
- Total Consideration (very/somewhat likely to use): 73%
- Total Took Action (looked online/used/purchased): 84%

For those who watched Network/Cable TV 20+hrs/pst wk:

- Awareness: 96%
- Total Favorability (very/somewhat): 70%
- Total Consideration (very/somewhat likely to use): 74%
- Total Took Action (looked online/used/purchased): 85%
Brand Metrics: Indeed (among AM/FM users)

Top Advertiser for AM/FM

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Total Favorability (very/somewhat)</th>
<th>Total Consideration (very/somewhat likely to use)</th>
<th>Total Took Action (looked online/used/purchased)</th>
</tr>
</thead>
<tbody>
<tr>
<td>71%</td>
<td>36%</td>
<td>37%</td>
<td>45%</td>
</tr>
<tr>
<td>76%</td>
<td>46%</td>
<td>41%</td>
<td>47%</td>
</tr>
<tr>
<td>73%</td>
<td>41%</td>
<td>33%</td>
<td>36%</td>
</tr>
</tbody>
</table>

- Didn’t listen to AM/FM / pst wk
- Listened to AM/FM / pst wk
- Listened to AM/FM 10+hrs / pst wk
Brand Metrics: Upside (among AM/FM users)

Top Advertiser for AM/FM

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Total Favorability (very/somewhat)</th>
<th>Total Consideration (very/somewhat likely to use)</th>
<th>Total Took Action (looked online/used/purchased)</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td>9%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>29%</td>
<td>16%</td>
<td>17%</td>
<td>18%</td>
</tr>
<tr>
<td>23%</td>
<td>12%</td>
<td>12%</td>
<td>15%</td>
</tr>
</tbody>
</table>

- Didn’t listen to AM/FM / pst wk
- Listened to AM/FM / pst wk
- Listened to AM/FM 10+hrs/ pst wk
Brand Metrics: ZipRecruiter (among AM/FM users)

Top Advertiser for AM/FM

<table>
<thead>
<tr>
<th>Metrics</th>
<th>Didn’t listen to AM/FM / pst wk</th>
<th>Listened to AM/FM / pst wk</th>
<th>Listened to AM/FM 10+hrs/ pst wk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness</td>
<td>58%</td>
<td>70%</td>
<td>79%</td>
</tr>
<tr>
<td>Total Favorability (very/somewhat)</td>
<td>20%</td>
<td>31%</td>
<td>34%</td>
</tr>
<tr>
<td>Total Consideration (very/somewhat likely to use)</td>
<td>21%</td>
<td>28%</td>
<td>27%</td>
</tr>
<tr>
<td>Total Took Action (looked online/used/purchased)</td>
<td>24%</td>
<td>27%</td>
<td>26%</td>
</tr>
</tbody>
</table>
Brand Metrics: Babbel (among AM/FM users)

Top Advertiser for AM/FM

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Total Favorability (very/somewhat)</th>
<th>Total Consideration (very/somewhat likely to use)</th>
<th>Total Took Action (looked online/used/purchased)</th>
</tr>
</thead>
<tbody>
<tr>
<td>36%</td>
<td>12%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>54%</td>
<td>21%</td>
<td>18%</td>
<td>14%</td>
</tr>
<tr>
<td>67%</td>
<td>28%</td>
<td>21%</td>
<td>21%</td>
</tr>
</tbody>
</table>

- Didn’t listen to AM/FM / pst wk
- Listened to AM/FM / pst wk
- Listened to AM/FM 10+hrs/ pst wk
Brand Metrics: BetterHelp (among Podcast users)

Top Advertiser for Podcasts

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Total Favorability (very/somewhat)</th>
<th>Total Consideration (very/somewhat likely to use)</th>
<th>Total Took Action (looked online/used/purchased)</th>
</tr>
</thead>
<tbody>
<tr>
<td>11%</td>
<td>5%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>37%</td>
<td>24%</td>
<td>21%</td>
<td>21%</td>
</tr>
<tr>
<td>54%</td>
<td>37%</td>
<td>29%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Legend:
- Didn’t listen to podcasts/ pst wk
- Listened to podcasts/ pst wk
- Listened to podcasts 5+hrs/ pst wk
Brand Metrics: Shopify (among Podcast users)

Top Advertiser for Podcasts

<table>
<thead>
<tr>
<th>Awareness</th>
<th>Total Favorability (very/somewhat)</th>
<th>Total Consideration (very/somewhat likely to use)</th>
<th>Total Took Action (looked online/used/purchased)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Didn’t listen</td>
<td>Listened to podcasts/ pst wk</td>
<td>Listened to podcasts 5+hrs/ pst wk</td>
<td></td>
</tr>
<tr>
<td>58%</td>
<td>69%</td>
<td>43%</td>
<td>47%</td>
</tr>
<tr>
<td>37%</td>
<td>41%</td>
<td>47%</td>
<td>47%</td>
</tr>
<tr>
<td>16%</td>
<td>17%</td>
<td>14%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Sponsored by: Shopify
Brand Metrics: McDonald’s (among Podcast users)

Top Advertiser for Podcasts

<table>
<thead>
<tr>
<th>Metric</th>
<th>didn’t listen to podcasts/ pst wk</th>
<th>listened to podcasts/ pst wk</th>
<th>listened to podcasts 5+hrs/ pst wk</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awareness</td>
<td>95%</td>
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<td>94%</td>
</tr>
<tr>
<td>Total Favorability (very/somewhat)</td>
<td>66%</td>
<td>68%</td>
<td>73%</td>
</tr>
<tr>
<td>Total Consideration (very/somewhat likely to use)</td>
<td>76%</td>
<td>78%</td>
<td>80%</td>
</tr>
<tr>
<td>Total Took Action (looked online/used/purchased)</td>
<td>89%</td>
<td>94%</td>
<td>97%</td>
</tr>
</tbody>
</table>
Brand Metrics: Athletic Greens (among Podcast users)

Athletic Greens

Top Advertiser for Podcasts

- **Awareness**
- **Total Favorability** (very/somewhat)
- **Total Consideration** (very/somewhat likely to use)
- **Total Took Action** (looked online/used/purchased)

<table>
<thead>
<tr>
<th></th>
<th>Didn't listen to podcasts/ pst wk</th>
<th>Listened to podcasts/ pst wk</th>
<th>Listened to podcasts 5+hrs/ pst wk</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Awareness</strong></td>
<td>6%</td>
<td>24%</td>
<td>35%</td>
</tr>
<tr>
<td><strong>Total Favorability</strong></td>
<td>2%</td>
<td>16%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Total Consideration</strong></td>
<td>3%</td>
<td>17%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Total Took Action</strong></td>
<td>2%</td>
<td>17%</td>
<td>24%</td>
</tr>
</tbody>
</table>
The role of **podcasting** in a media buy

Podcasting provides a unique, additive, and younger audience to a broadcast media buy.
Adding Podcasts to Network/Cable TV and AM/FM buy adds younger consumers

Mean age, Past week users

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>TV only</td>
<td>55.3</td>
</tr>
<tr>
<td>AM/FM only</td>
<td>47.8</td>
</tr>
<tr>
<td>Podcasts only</td>
<td>36.4</td>
</tr>
</tbody>
</table>

“Only” = used medium in past week, did not use other two media in same period
Adding Podcasts to Network/Cable TV and AM/FM buy adds younger consumers

Mean age, Past week users

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<tr>
<td>TV + AM/FM + Podcast</td>
<td>41.7</td>
</tr>
<tr>
<td>AM/FM + Podcast</td>
<td>39.1</td>
</tr>
<tr>
<td>TV + Podcast</td>
<td>37.0</td>
</tr>
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“Only” = used medium in past week, did not use other two media in same period
The role of **podcasting** in a media buy

1. Podcasting provides a unique, additive, and younger audience to a broadcast media buy.

2. Podcasting enhances a TV or AM/FM buy with increased mid- and lower-funnel benefits.
For omnichannel insurance brands, Podcasts outperform AM/FM and TV in mid-funnel metrics with single-channel consumers.

### Favorability
- **Very/somewhat favorable**
  - TV-only: 34%
  - AM/FM-only: 37%
  - Podcast-only: 39%

### Consideration
- **Very/somewhat likely to use**
  - TV-only: 23%
  - AM/FM-only: 31%
  - Podcast-only: 36%
Podcasts enhance mid-funnel metrics when combined with TV and AM/FM, especially when compared to just TV+AM/FM alone.

<table>
<thead>
<tr>
<th></th>
<th>Favorability</th>
<th>Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Very/somewhat favorable</td>
<td>Very/somewhat likely to use</td>
</tr>
<tr>
<td>TV + AM/FM</td>
<td>44%</td>
<td>30%</td>
</tr>
<tr>
<td>TV + Podcast</td>
<td>39%</td>
<td>29%</td>
</tr>
<tr>
<td>AM/FM + Podcast</td>
<td>49%</td>
<td>43%</td>
</tr>
<tr>
<td>TV + AM/FM + Podcast</td>
<td>59%</td>
<td>57%</td>
</tr>
</tbody>
</table>

**TV + AM/FM**

- Favorability: 44%
- Consideration: 30%

**TV + Podcast**

- Favorability: 39%
- Consideration: 29%

**AM/FM + Podcast**

- Favorability: 49%
- Consideration: 43%

**TV + AM/FM + Podcast**

- Favorability: 59%
- Consideration: 57%

**Used in past week**

- TV + AM/FM: 5
- TV + Podcast: 4
- AM/FM + Podcast: 5
- TV + AM/FM + Podcast: 6
Podcasting provides a unique, additive, and younger audience to a broadcast media buy.

Podcasting enhances a TV or AM/FM buy with increased mid- and lower-funnel benefits.

In the world of gaining consumer attention 30-60 seconds at a time, podcasting simply drives favorability, consideration, and action better.
Average **Awareness** Increase, Top Five Brands Per Medium

**TV:** +4%

Average awareness increase of top five TV brands by share of voice between Weekly TV Viewers and non-weekly viewers.

**Radio:** +7%

Average awareness increase of top five radio brands by share of voice between Weekly radio listeners and non-weekly listeners.

**Podcasts:** +7%

Average awareness increase of top five podcast brands by share of voice between Weekly Podcast listeners and non-weekly listeners.
Average Favorability Increase, Top Five Brands Per Medium

**TV:** +5%
Average favorability increase of top five TV brands by share of voice between Weekly TV Viewers and non-weekly viewers.

**Radio:** +8%
Average favorability increase of top five radio brands by share of voice between Weekly radio listeners and non-weekly listeners.

**Podcasts:** +14%
Average favorability increase of top five podcast brands by share of voice between Weekly Podcast listeners and non-weekly listeners.
Difference in brand measures between past week users and non-users of each medium past week

Average Consideration Increase, Top Five Brands Per Medium

**TV:** +4%

Average consideration increase of top five TV brands by share of voice between Weekly TV Viewers and non-weekly viewers.

**Radio:** +5%

Average consideration increase of top five radio brands by share of voice between Weekly radio listeners and non-weekly listeners.

**Podcasts:** +15%

Average consideration increase of top five podcast brands by share of voice between Weekly Podcast listeners and non-weekly listeners.
Difference in brand measures between past week users and non-users of each medium past week

Average **Action Increase**, Top Five Brands Per Medium

**TV:** +1%
Avg. action increase of top five TV brands by share of voice between Weekly TV Viewers and non-weekly viewers

**Radio:** +6%
Avg. action increase of top five radio brands by share of voice between Weekly Radio listeners and non-weekly listeners

**Podcasts:** +16%
Avg. action increase of top five podcast brands by share of voice between Weekly Podcast listeners and non-weekly listeners
Findings

- Podcasting’s weekly reach 18-34 is nearing that of radio and TV
- The median age of heavy users of radio and TV is significantly older than that of heavy listeners to podcasts
- Podcast buys reach net-new consumers when added to TV or Radio buys
- Podcast listeners are more likely to subscribe to premium, ad-free content options
- Podcast listeners are significantly more positive towards the brands that support the medium than Radio listeners or TV viewers
- The leading advertisers in podcasting perform significantly better in lower-funnel metrics with podcast listeners than the leading advertisers in TV and Radio do with their consumers
- The addition of podcasts to a multichannel media mix shows significant mid-funnel effects
The Medium Moves The Message

A Comparative Assessment of Advertising from Broadcast to Podcast