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# The Ad Bargain

Attracting Consumer Attention in a Sea of Ads

April 2024



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Attracting Consumer  
Attention in a Sea of Ads

April 2024



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# Summary

- The Ad Bargain is a large consumer study of over 2000 Americans 18+, weighted to the general population. Respondents were asked a variety of questions about their receptiveness, attentiveness, and overall attitude toward advertising across a range of ad-supported media.
- Last year, Sounds Profitable released a study called The Medium Moves The Message, which compared ad effectiveness between podcasting and two other, spot-based traditional media channels, Broadcast TV and AM/FM Radio.
- This year, Sounds Profitable turns its lens on two of the fastest-growing channels in digital ad spend: YouTube and Streaming/CTV. The results were clear across the board - podcast advertising leads the way in receptivity, attention, and, most importantly, effectiveness.

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# Summary

- In addition to these general questions about advertising, we selected five leading brands (GEICO, State Farm, Amazon, Walmart, and HelloFresh) to see how they were perceived by users of podcasts, YouTube, and Streaming TV across four standard brand measures: Awareness, Favorability, Consideration, and Purchase.
- The first four brands were chosen as exemplars of heavy advertisers across all channels, while HelloFresh was chosen specifically for the company's high level of activity in podcasting, specifically.
- To test these brands, we looked at the difference between the general population and weekly users for each of the three media channels.

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# Key Findings

- 71% of podcast listeners are willing to learn more about the brands that advertise on podcasts - higher than any other medium
- Podcast listeners are more attentive to ads - Podcasting led other media tested in the percentage to listen "all the way through" the ads on podcasts
- As a result, listeners to podcasts are more likely to take action: **65% indicated they are likely to look for more information** about brands that advertise in podcasts, **59% would recommend such brands** to others, and **53% would be likely to purchase a brand** they heard advertised on a podcast

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# Key Findings

- For HelloFresh, a very active podcast advertiser, the differential between the general population and podcast listeners was 9% for Awareness, 10% for Favorability, 9% for Consideration, and 13% for Purchase - the highest positive differentials in the study.
- **Podcast listeners also led all in all four brand metrics** for GEICO and State Farm, two of the four metrics for Amazon, and led or were tied for all four metrics for Walmart.

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# Key Findings

- The average positive differentials for the average metrics across all five brands were led by weekly podcast listeners, with these results:

**Awareness - +5%** (CTV and YouTube were both +2%)

**Favorability - +4%** (CTV and YouTube were both +1%)

**Consideration - +5%** (CTV +3%, YouTube +2%)

**Purchase - +9%** (CTV and YouTube were both +3%)

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# Methodology:

- In February 2024, Sounds Profitable partnered with **Signal Hill Insights** to field an online study of **2020** general population respondents, ages 18+.
- The sample was weighted to the most recent census data to be **representative of the US population.**
- Respondents were asked a variety of questions about media consumption with an emphasis on **Podcasts, Streaming TV, and YouTube**, as well as general attitudes toward advertising.

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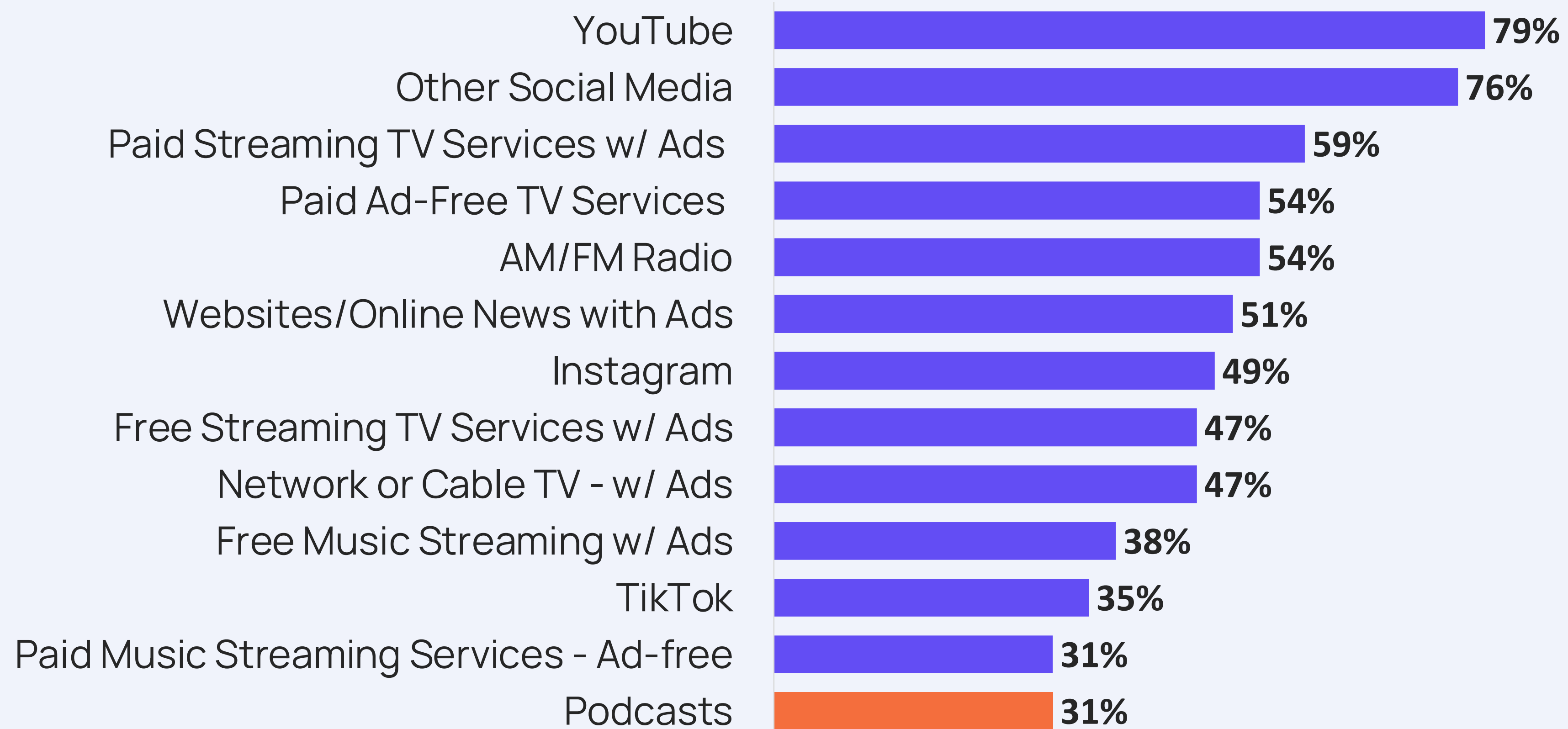
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# Which of the following types of media have you used in the past week or 7 days?



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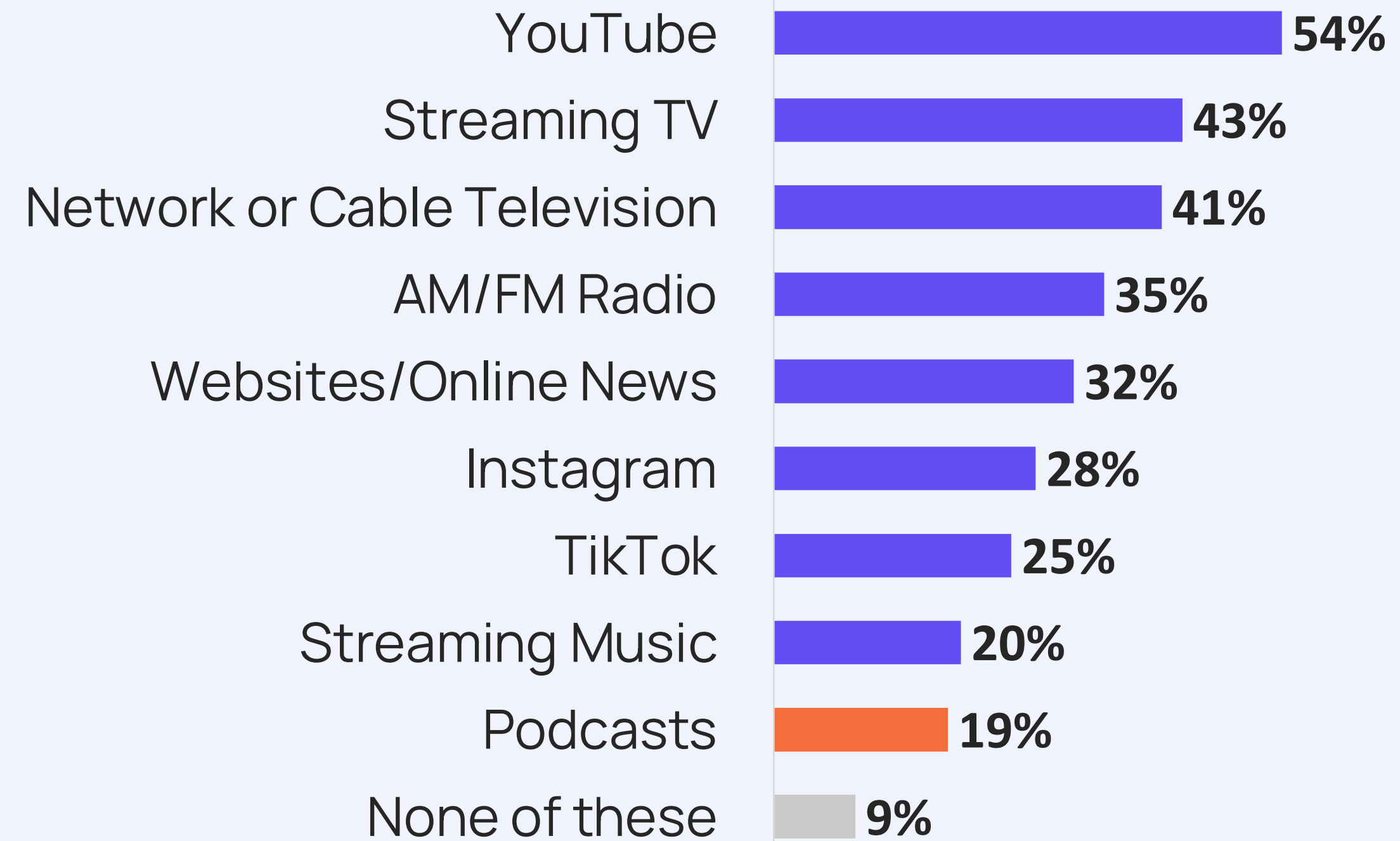
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# In the last week, have you seen or heard any advertising on...?

56%

Weekly Podcast consumers heard a podcast ad in the last week



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# Podcast Consumers are Receptive and Attentive

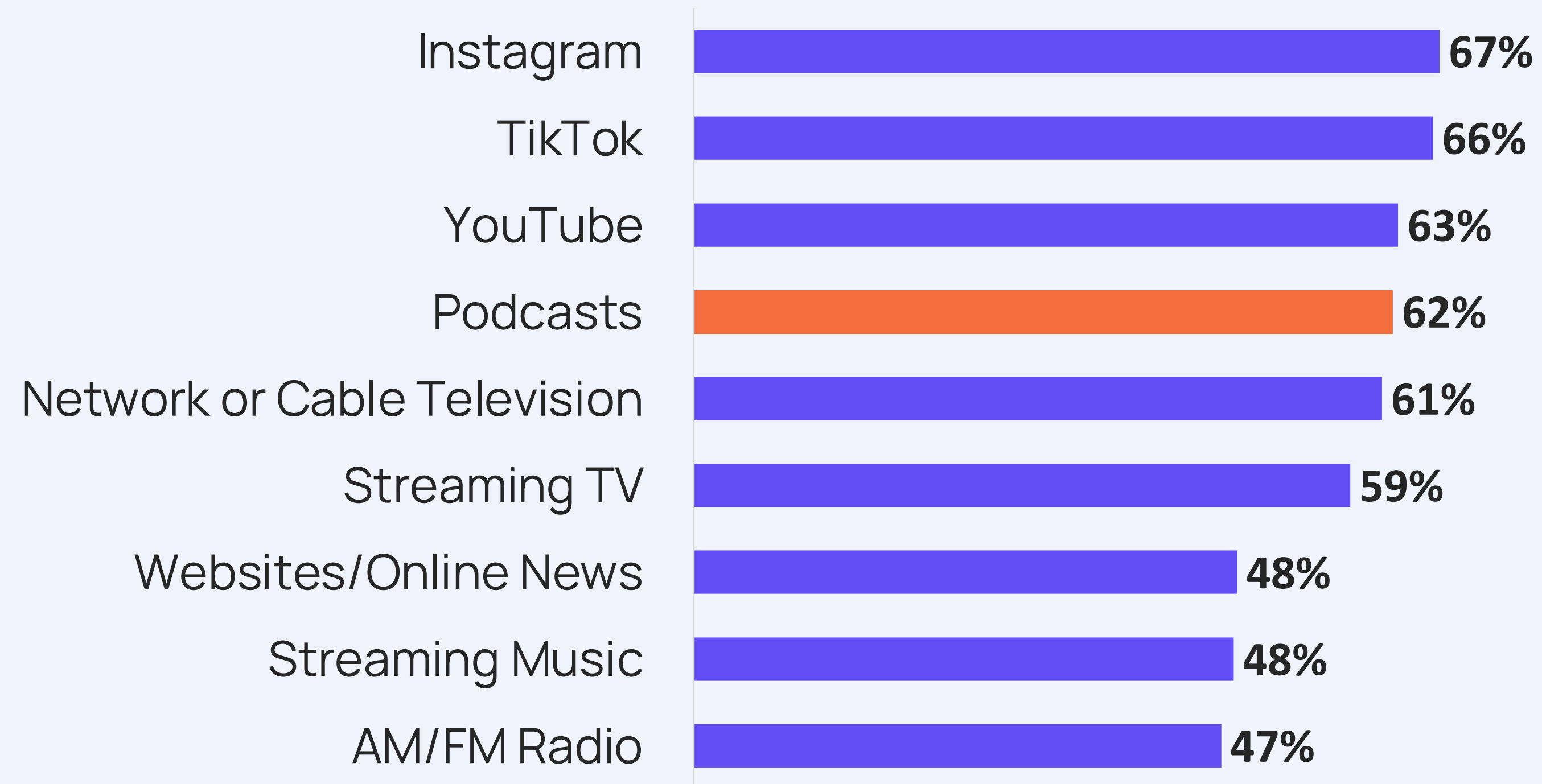
Podcast Listeners are extremely

- receptive to the products and services they hear on podcast ads



# “Advertising on this media is generally the best way to reach me”

% Agree, seen or heard advertising past week on each medium



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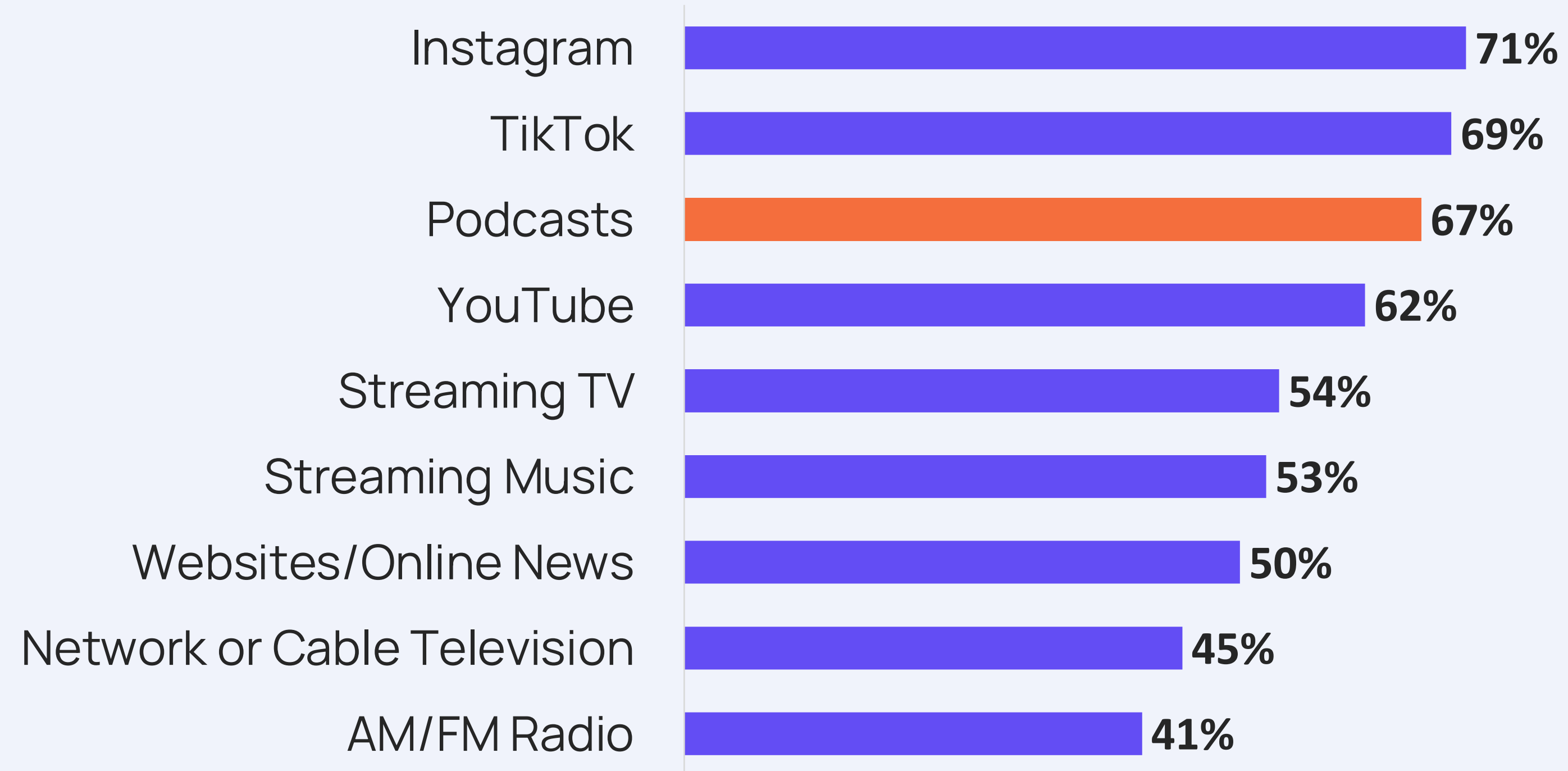
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# “The ads I hear/ see on this media are generally relevant to me”

% Agree, seen or heard advertising past week on each medium



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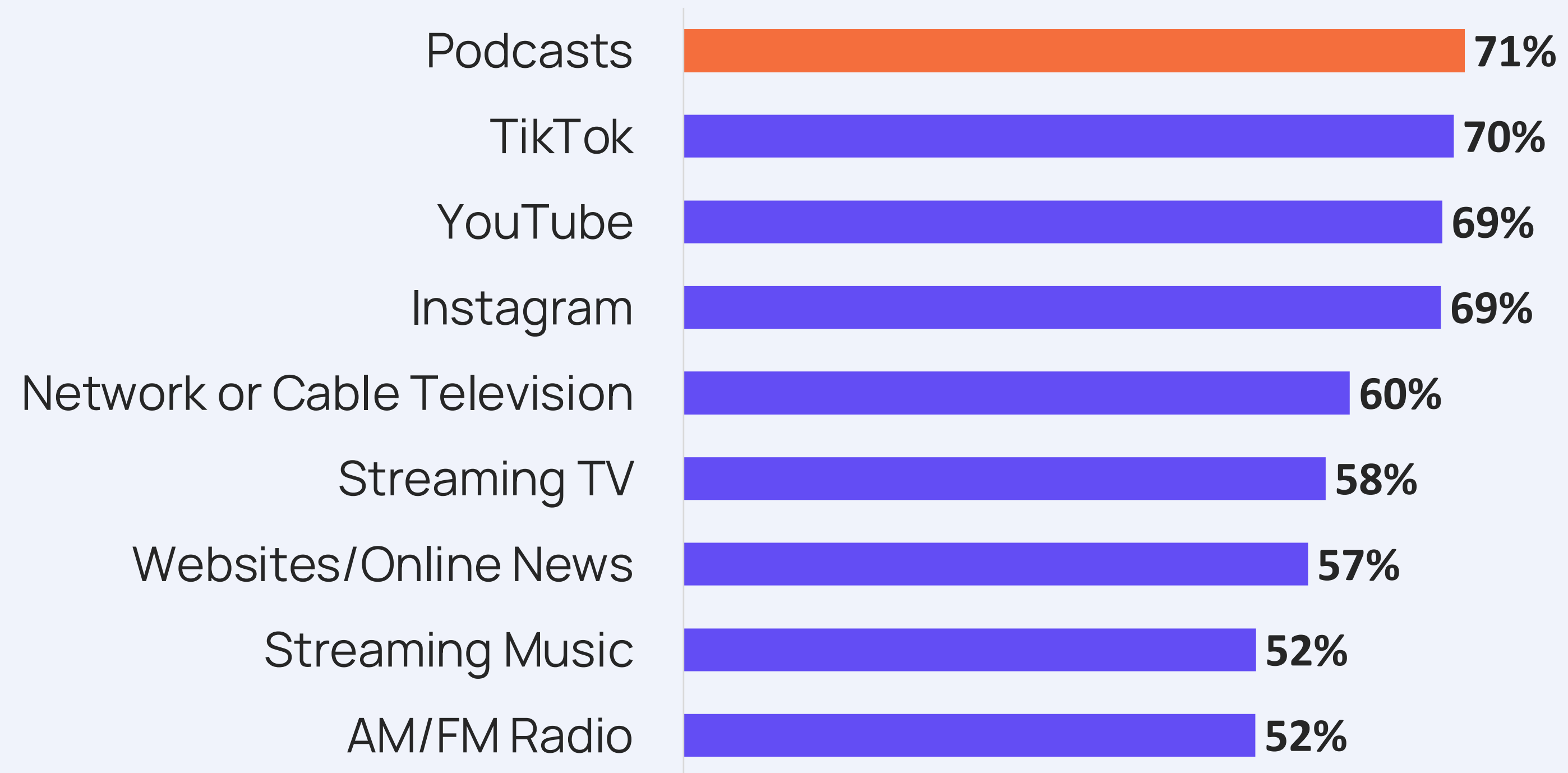
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# “I am more willing to consider products and services after I learn about them on this media”

% Agree, seen or heard advertising past week on each medium



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# Podcast Consumers are Receptive and Attentive

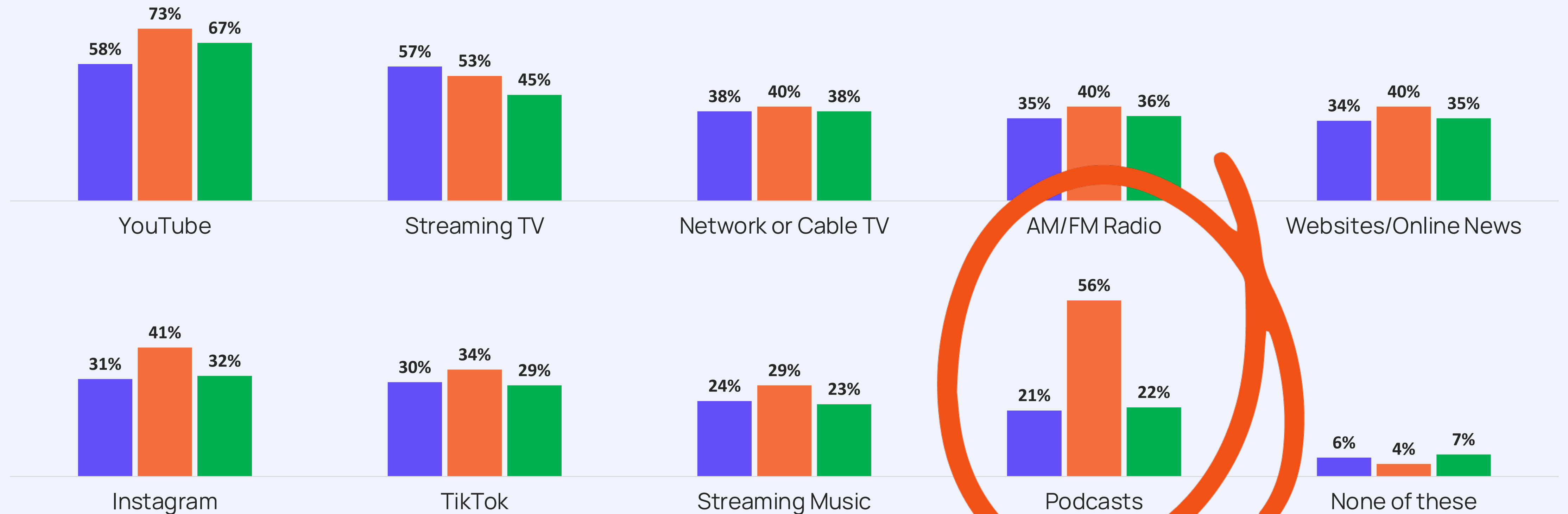
Podcast Listeners are extremely receptive to the products and services they hear on podcast ads

They are both positive about podcast creators and less inundated with ads in general, which increases their attention



# In the last week, have you seen or heard any advertising on...?

● Streaming TV past week users    ● Podcast past week users    ● YouTube past week users



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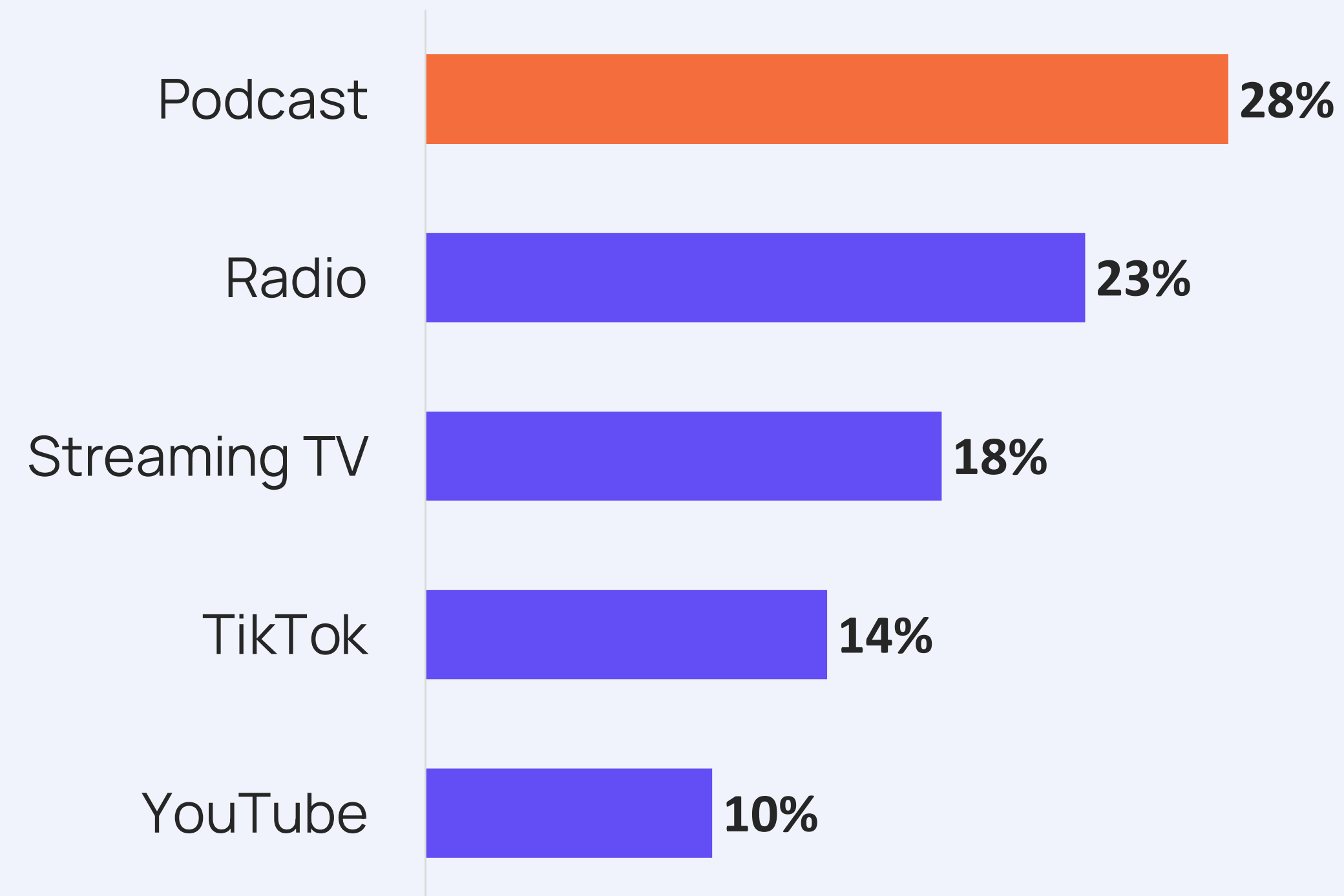
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Users of each medium who “watch or listen to all of the ads” they encounter on...



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# Podcast Consumers are Receptive and Attentive

Podcast Listeners are extremely

- **receptive** to the products and services they hear on podcast ads

They are both positive about podcast

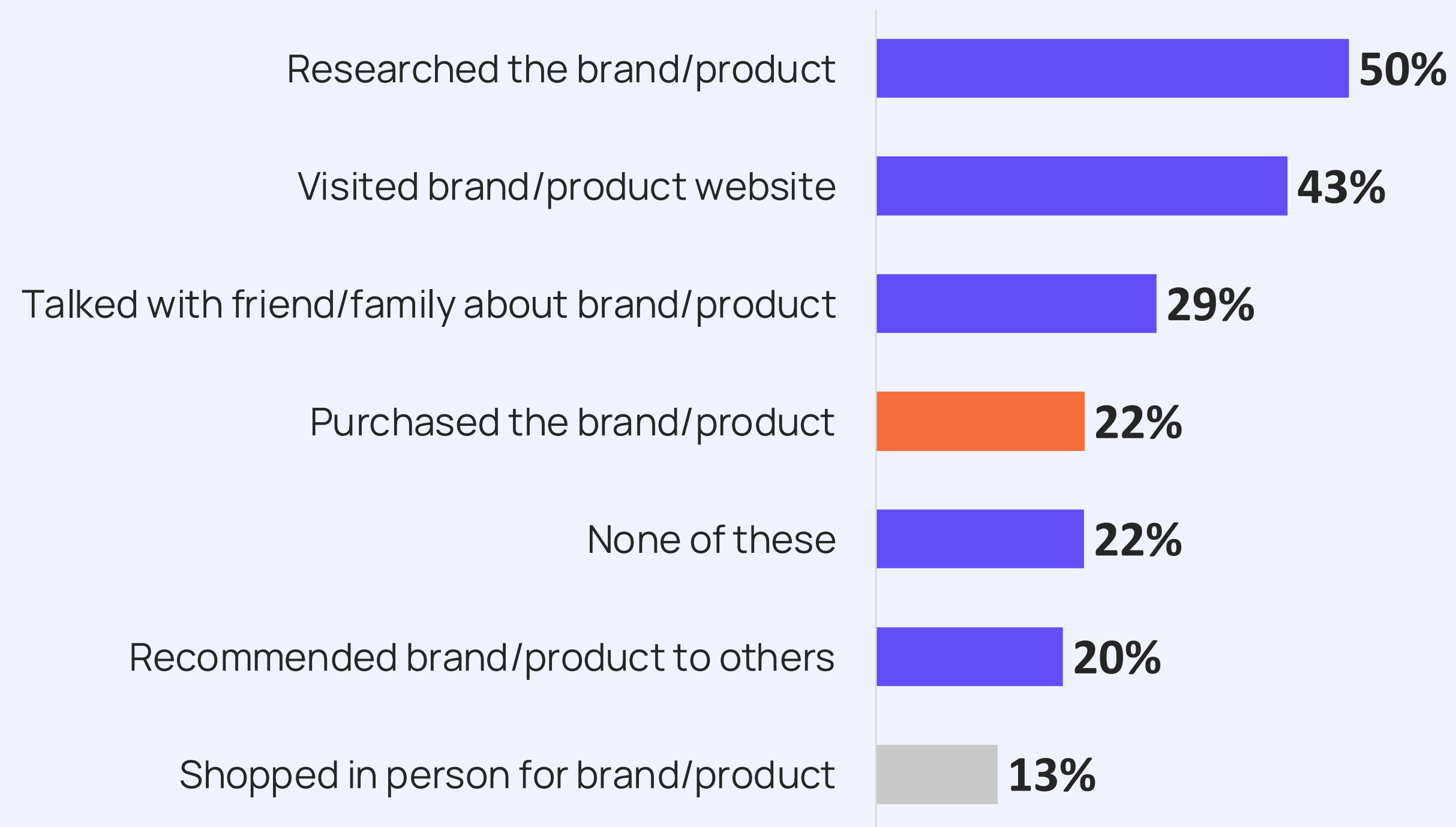
- creators and less inundated with ads in general, which increases their **attention**

...which increases the likelihood that the

- ads will **work**, turning that attention into purchase funnel **action**



# Which of the following, if any, have you done after seeing or hearing a podcast ad?



Base: Weekly podcast listeners

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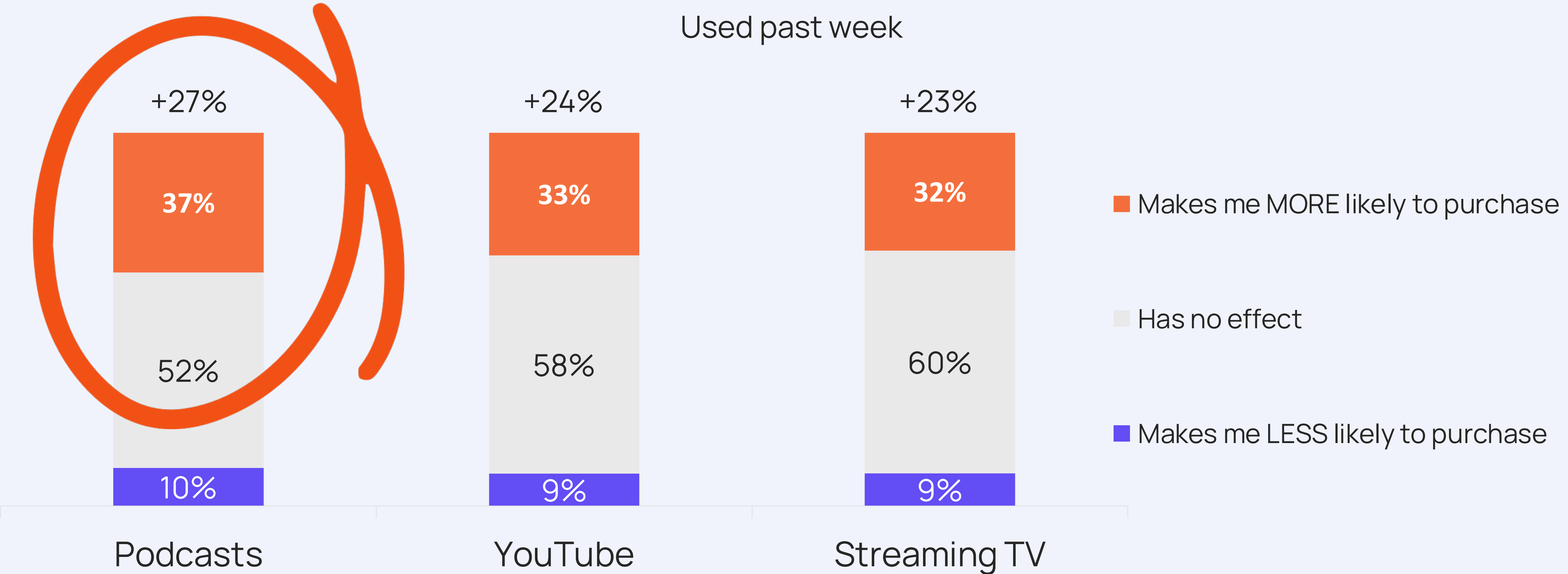
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# Does hearing/ seeing an advertisement on this medium make you more or less likely to purchase a product/ service?

Used past week



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# The Medium Moves The Message

A Comparative Assessment of  
Advertising from Broadcast to Podcast

March 2023



Difference in brand measures between past week users and non-users of each medium past week

## 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

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**mowpod**

**AUDIOHOOK**

Difference in brand measures between past week users and non-users of each medium past week

## 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

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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

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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%

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

Radio: +6%

Average action increase  
Of top five radio brands by share of  
voice between Weekly Radio  
listeners and non-weekly listeners

Podcasts: +16%

Average action increase  
Of top five podcast brands by share of voice  
between Weekly Podcast listeners and  
non-weekly listeners

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# The Ad Bargain – A Focus on Three Fast-Growing Digital Channels

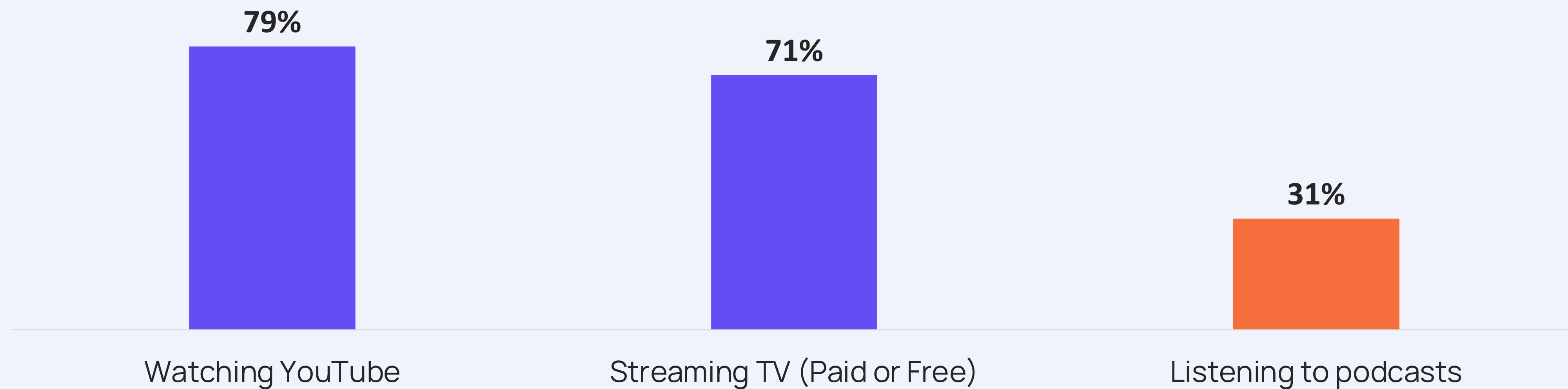
Podcasting

YouTube

Streaming/CTV



# Which of the following types of media have you used in the past week or 7 days?



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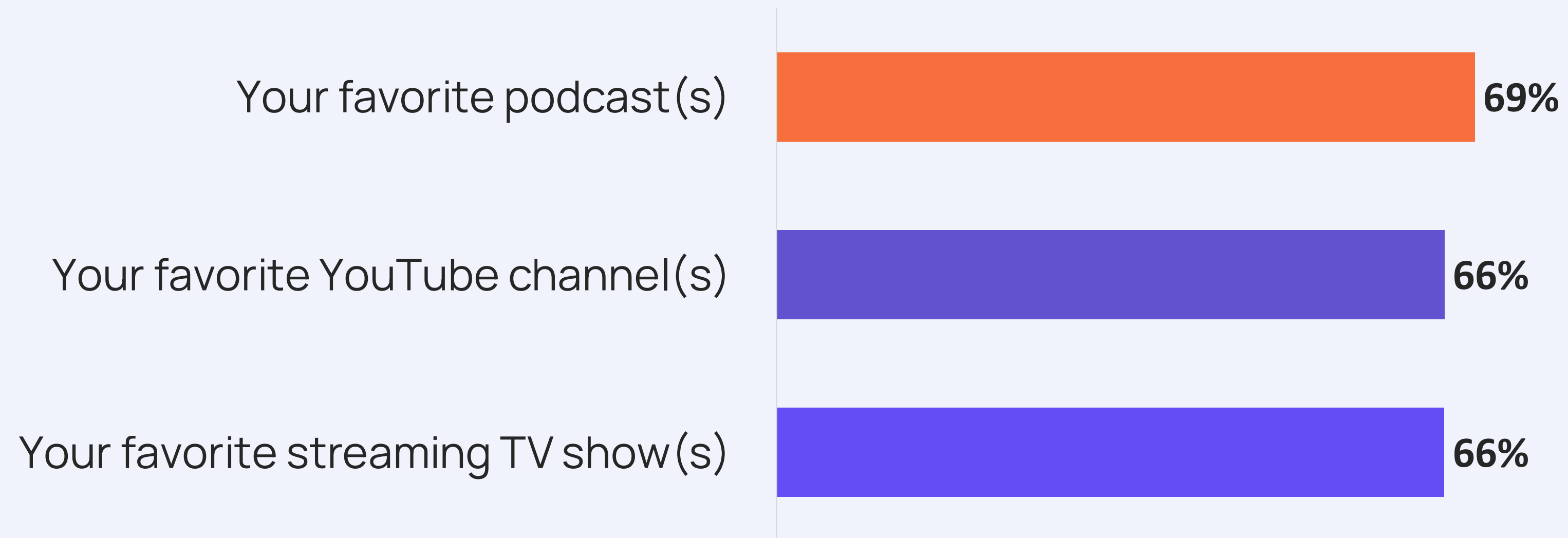
# Podcast Consumers are Receptive and Attentive

Podcast Listeners **discover** new brands  
and **try** them, in part because they find  
podcast ads less objectionable



# You have **discovered new brands** or products from sponsorship messages on the following

% Agree, used past week



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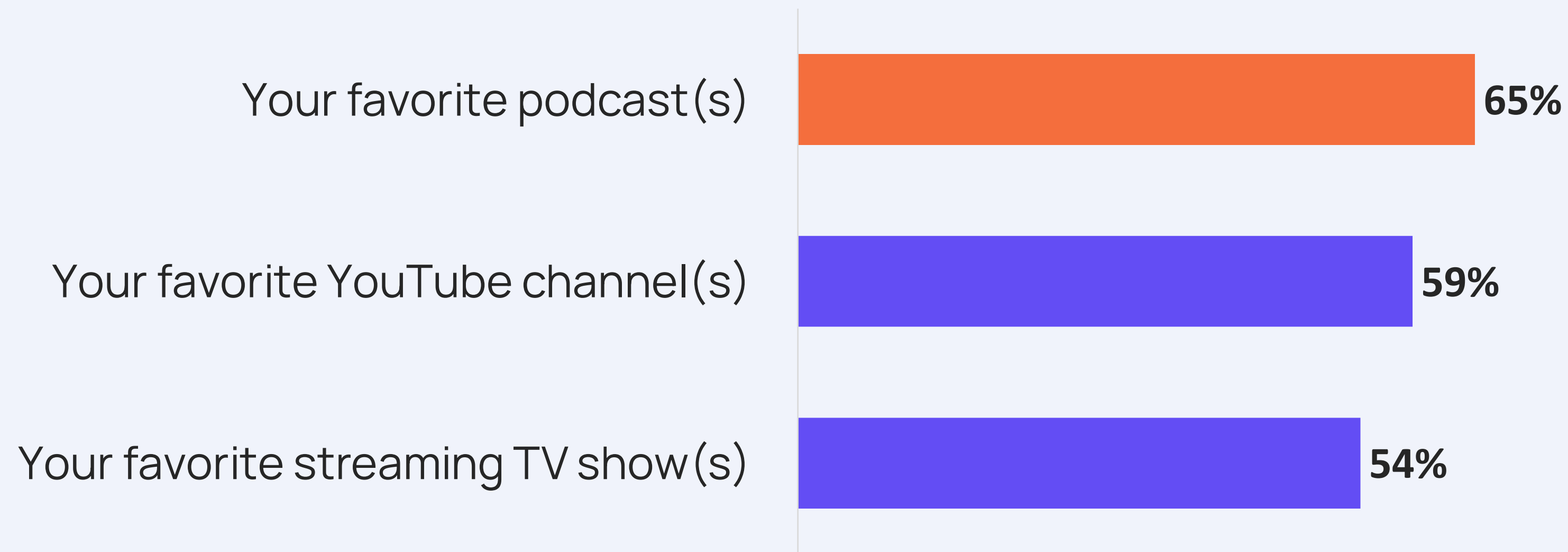
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# Sponsorship messages on the following provide **compelling discounts or offers** for products and services

% Agree, used past week



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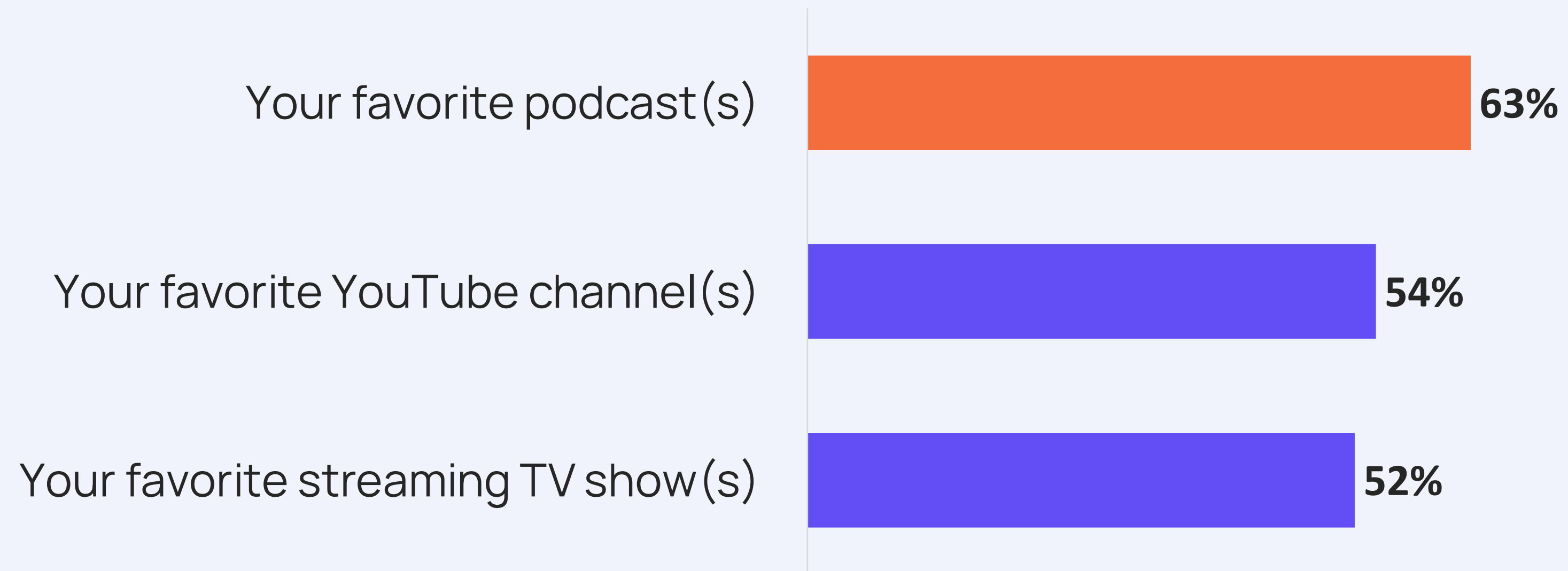
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# Sponsorship messages on the following are **less annoying** than other ads

% Agree, used past week



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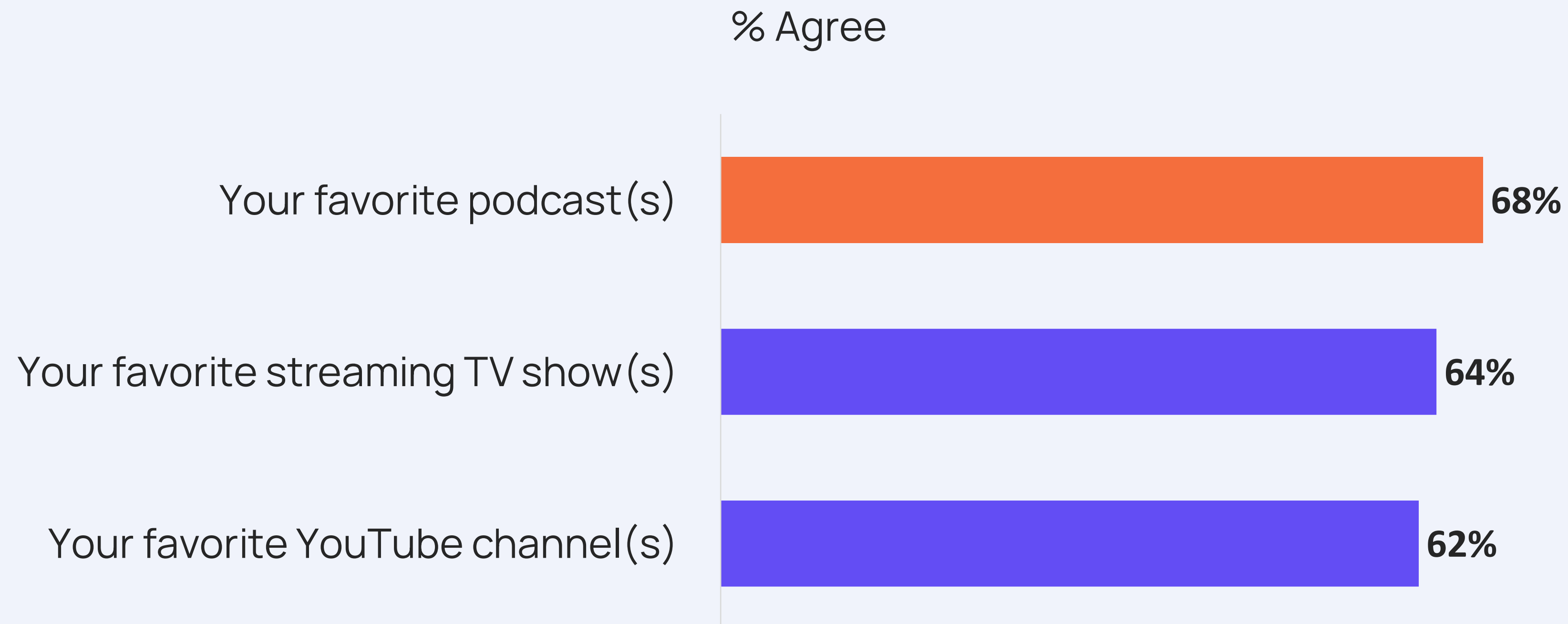
SiriusXM  
PODCAST NETWORK

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# Would you agree or disagree that the following protects your privacy?



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# Podcast Consumers are Receptive and Attentive

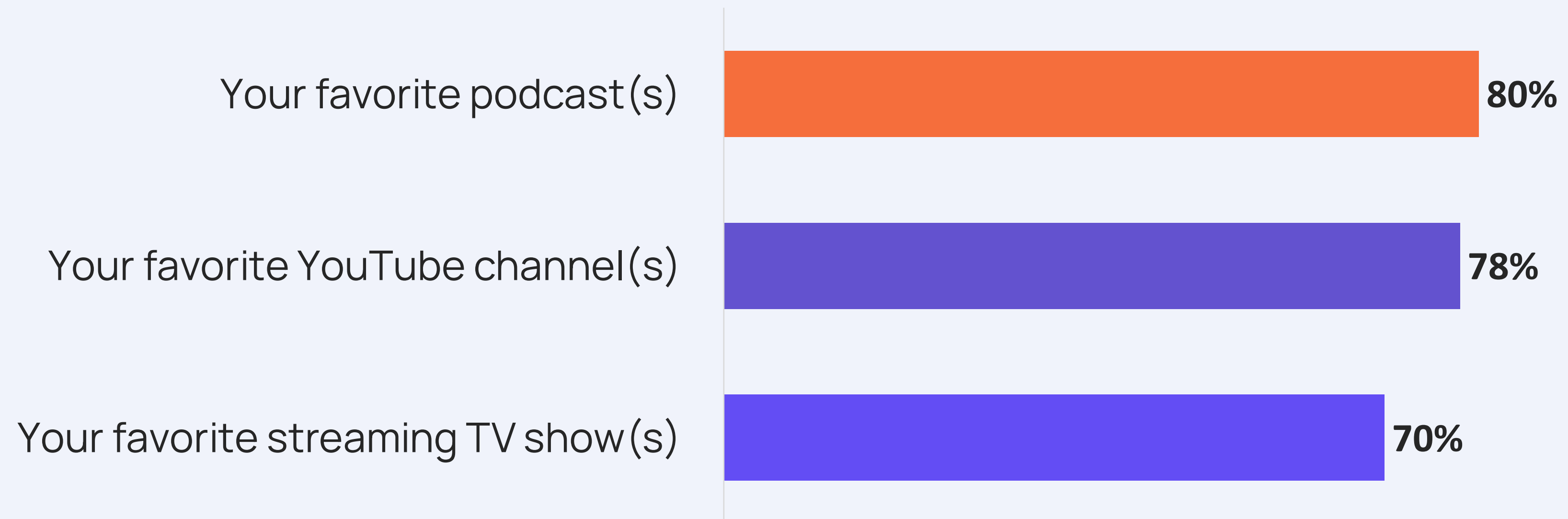
Podcast Listeners **discover** new brands and **try** them, in part because they find podcast ads less objectionable

Because listeners see the direct tie from creator support and ad support, they feel more **positively** about the brands



# The ads you hear or see on the following help creators to continue making new content?

% Agree, used past week



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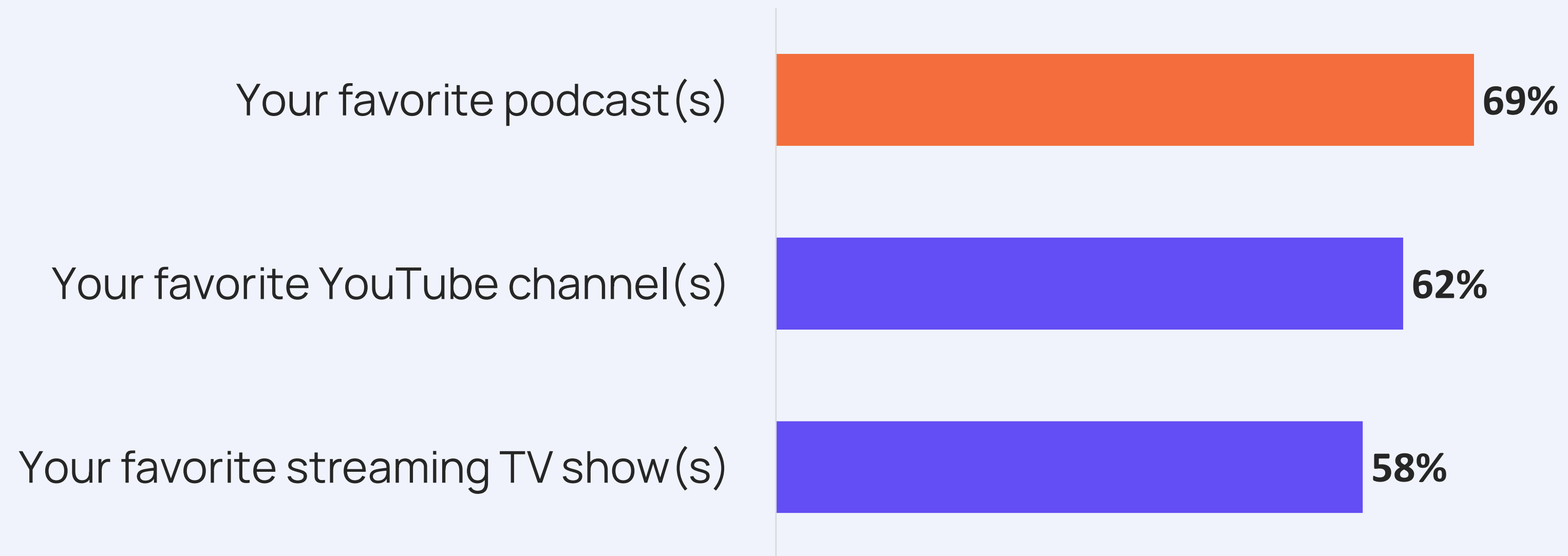
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# Your opinion of a brand is more positive when you find out it supports...

% Agree, used past week



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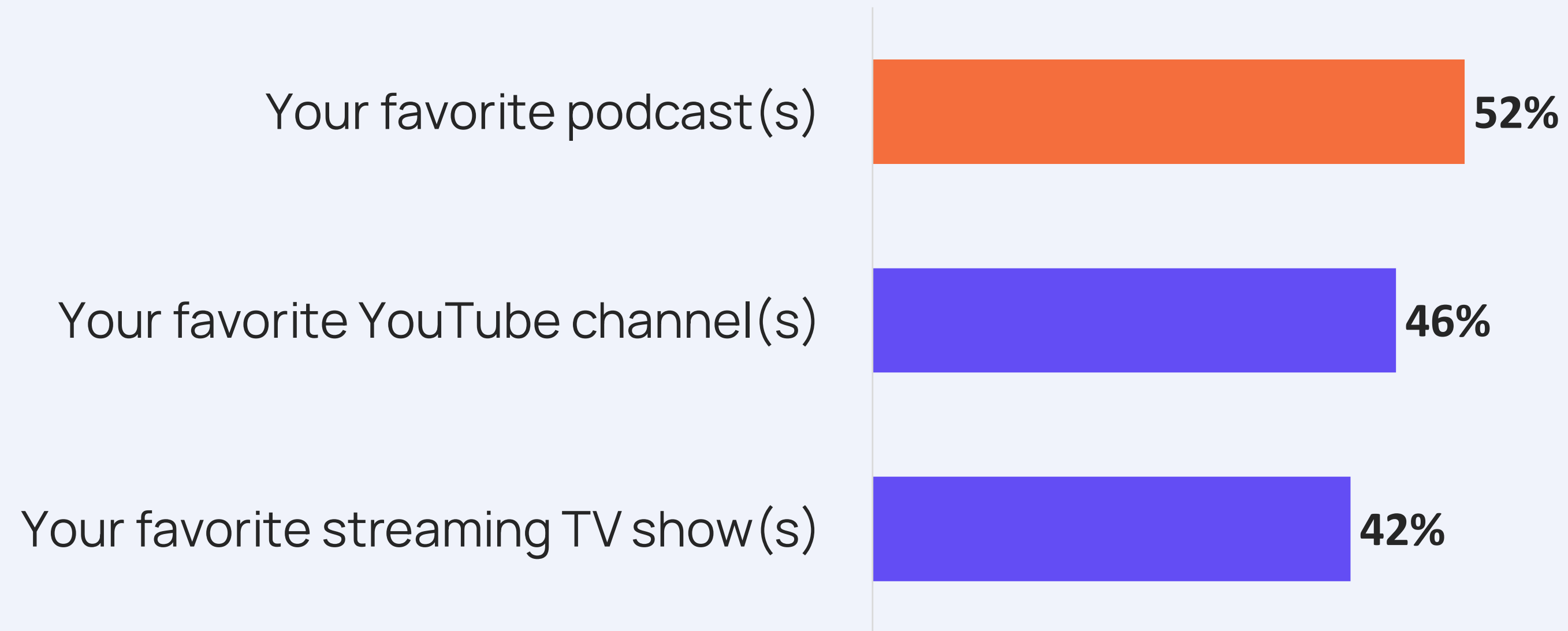
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# You go out of your way to support brands that support...

% Agree, used past week



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# Podcast Consumers are Receptive and Attentive

Podcast Listeners **discover** new brands and **try** them, in part because they find podcast ads less objectionable

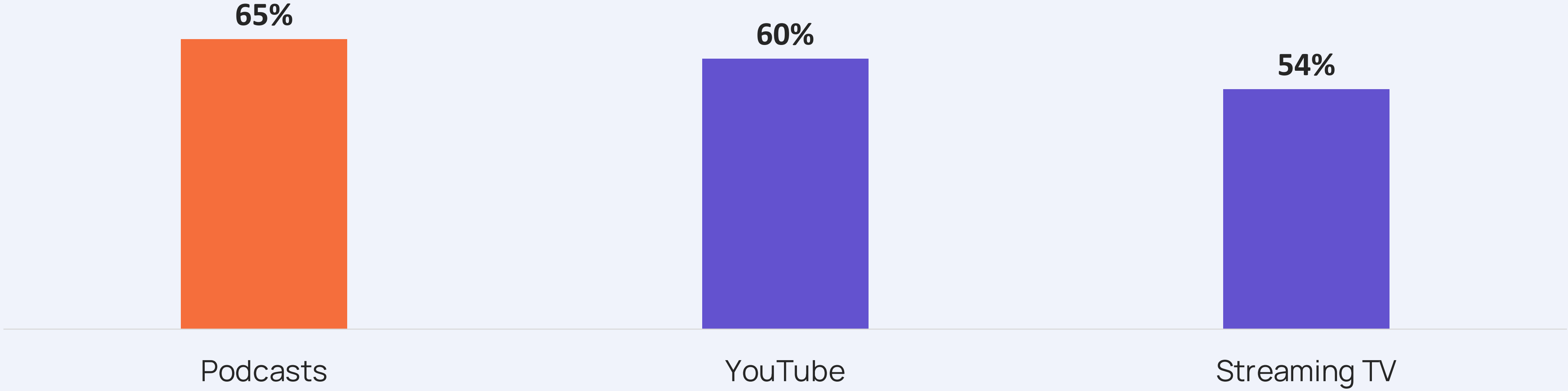
Because listeners see the direct tie from creator support and ad support, they feel more **positively** about the brands

As a result, they are very likely to **act**, from research, to recommendations, to **buying** products that support podcasts



# How likely are you to **look for more info** about a product or service you see or hear advertised on this medium?

% Very/somewhat likely, used past week

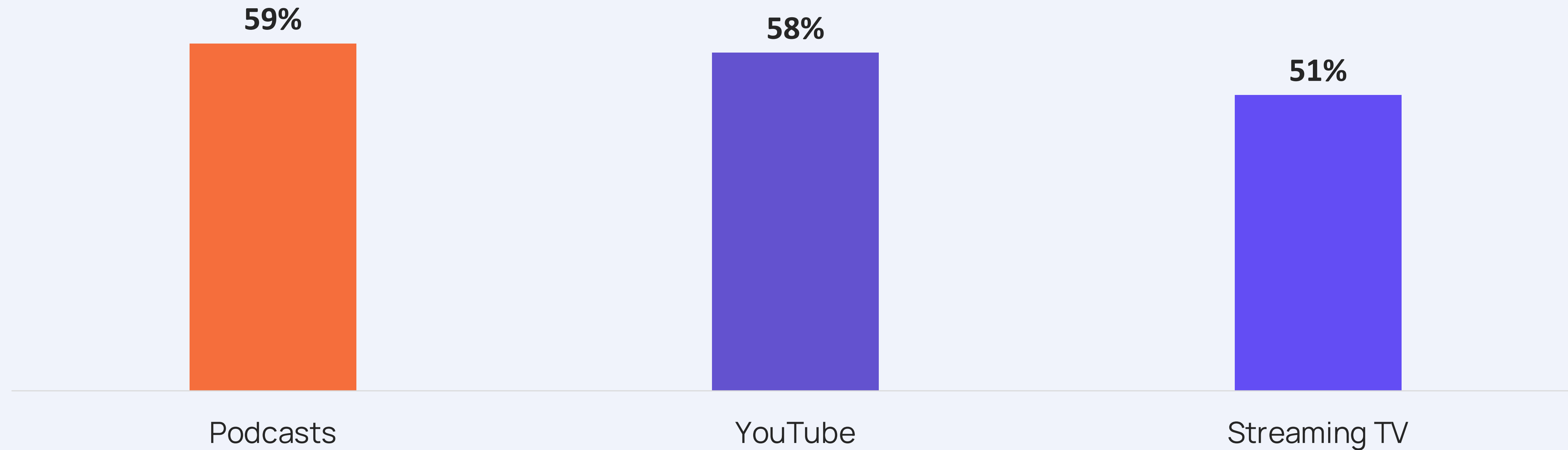


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# How likely are you to recommend a product or show you see or hear advertised on this medium?

% Very/somewhat likely, used past week



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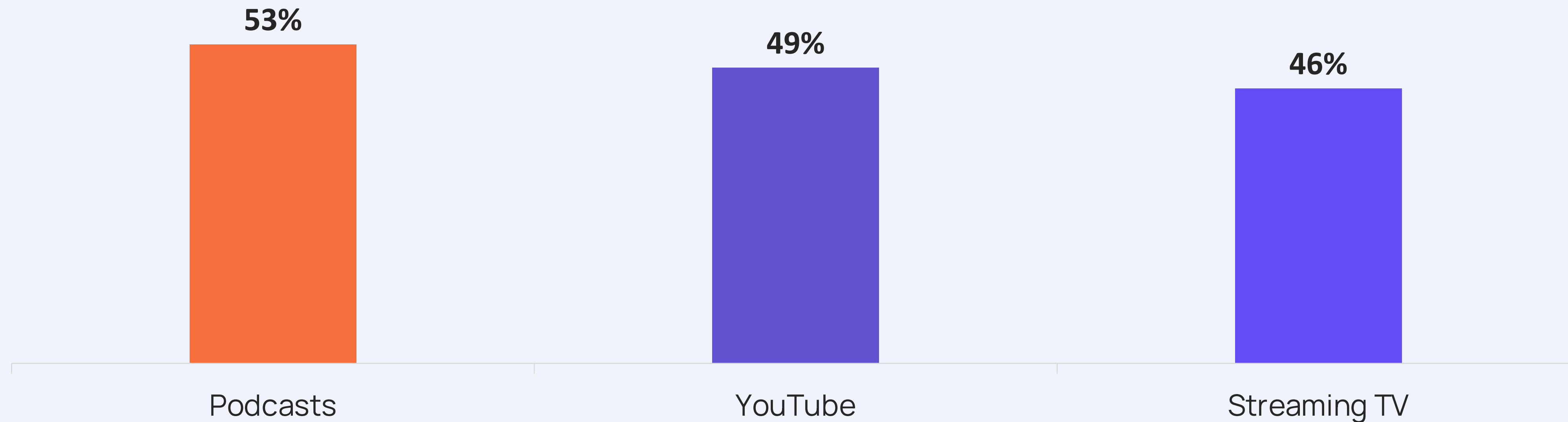
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# How likely are you to purchase a product or service you see or hear advertised on this medium?

% Very/somewhat likely, used past week



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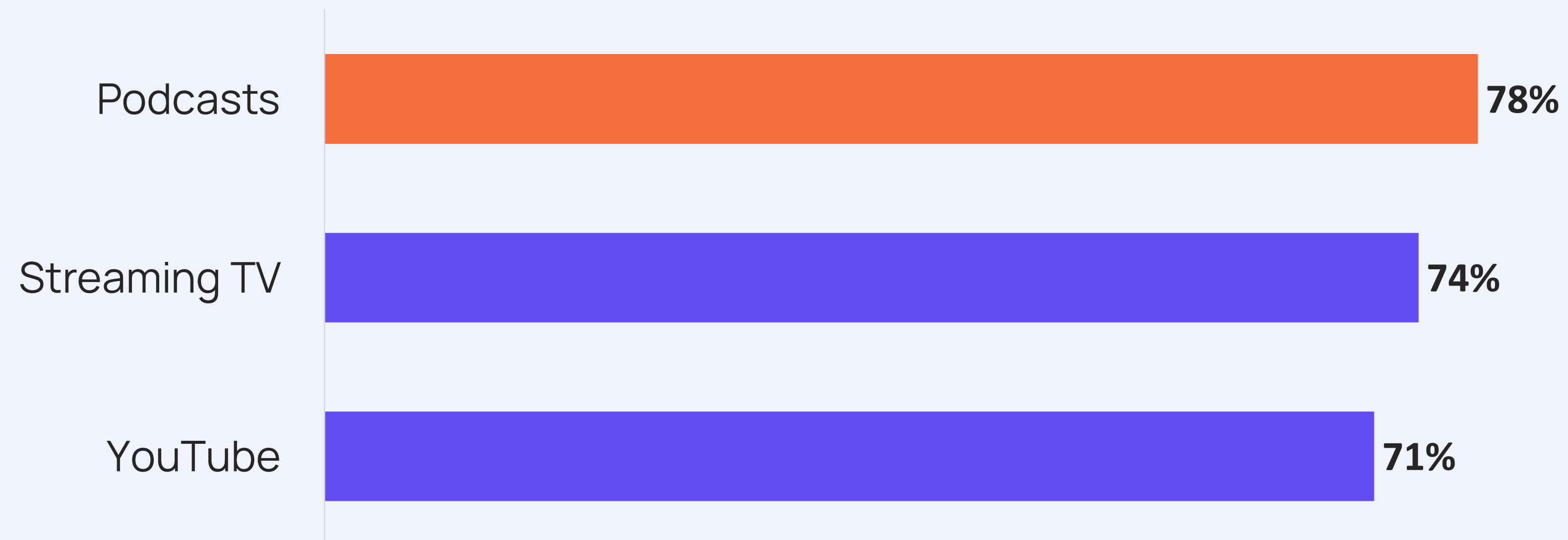
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# Percentage of Weekly Users of each medium who took any advertising-related action after seeing/hearing an ad



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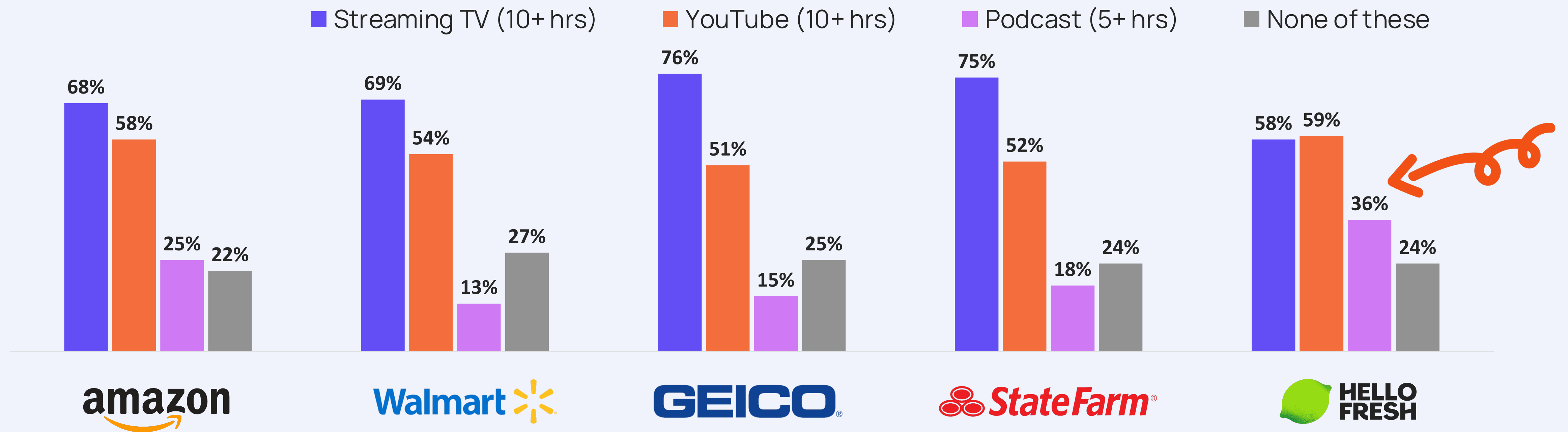
# Brands in Focus:

4 Heavy Cross-Channel Advertisers & 1 Top Podcast Advertiser



# Do you ever recall seeing or hearing advertising for these brands on each of these media sources?

Among aware & Heavy weekly users



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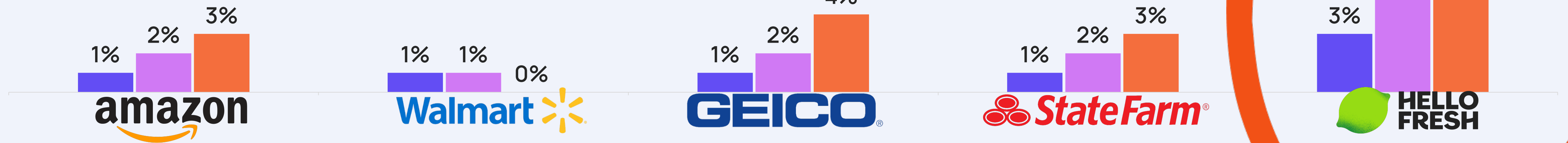
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# Think back to the first time you heard about each brand. How did you first hear about this brand?

Percent saying "Podcast Ad," aware of brand

● Total Sample    ● Past Week Users    ● Heavy Users



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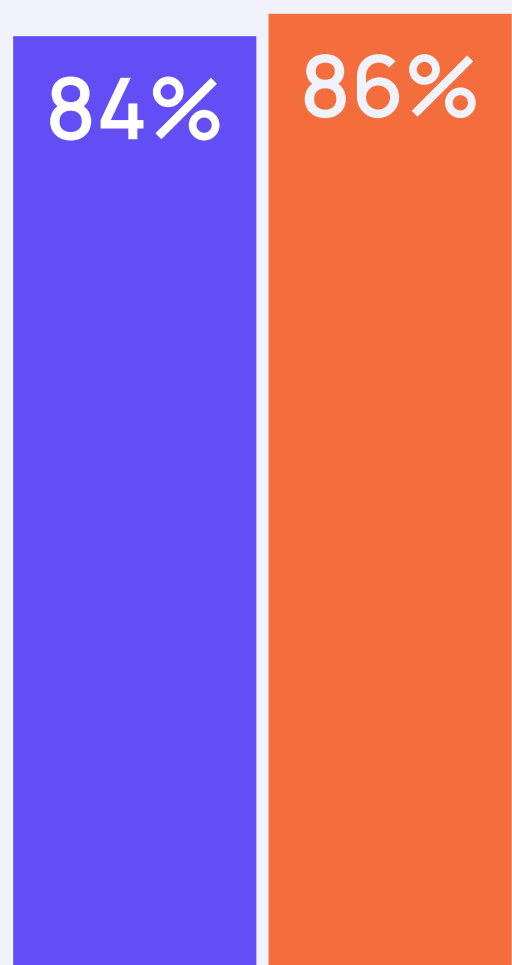
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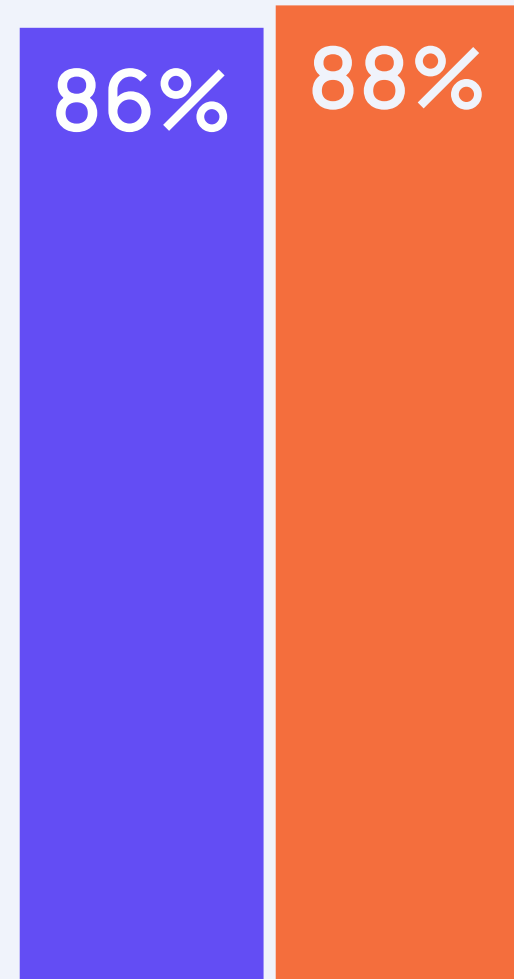
# Brand Metrics: Amazon (Streaming TV)



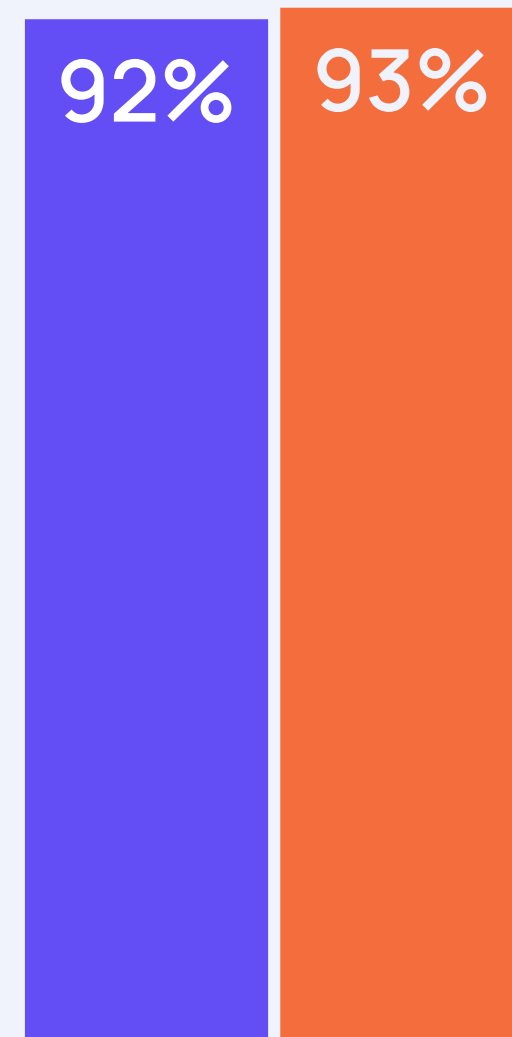
Awareness



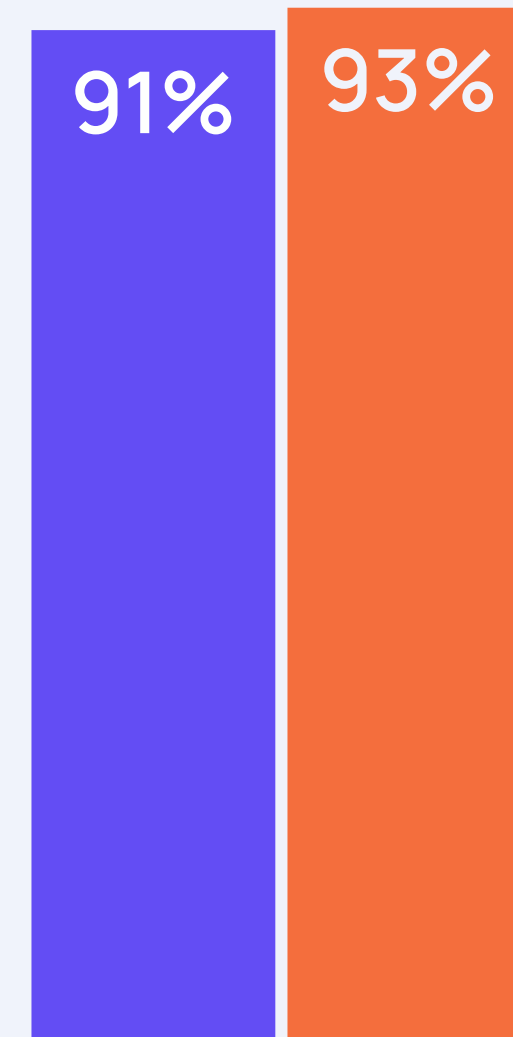
Total Favorability  
(very/somewhat)



Total Consideration  
(very/somewhat likely to use)



Total Took Action  
(looked online/used/  
purchased)



Total Sample

Past Week Users

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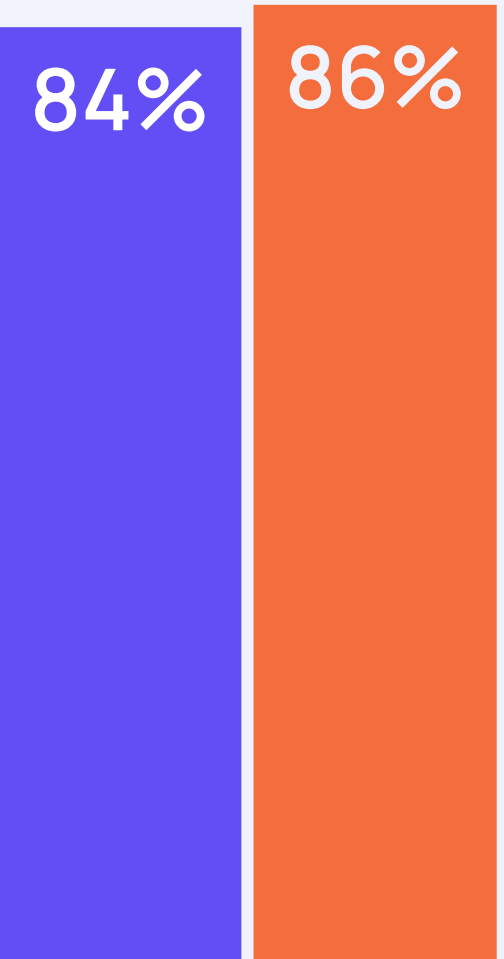
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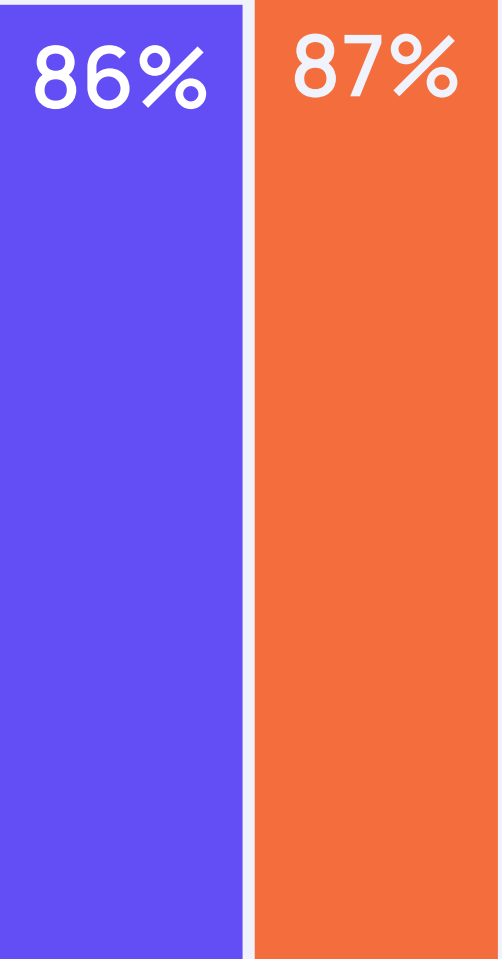
# Brand Metrics: Amazon (YouTube)



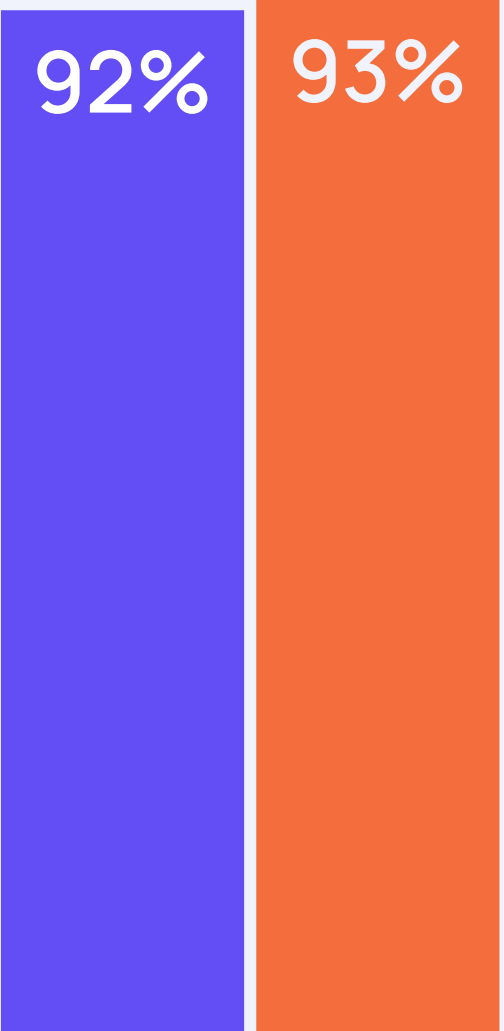
Awareness



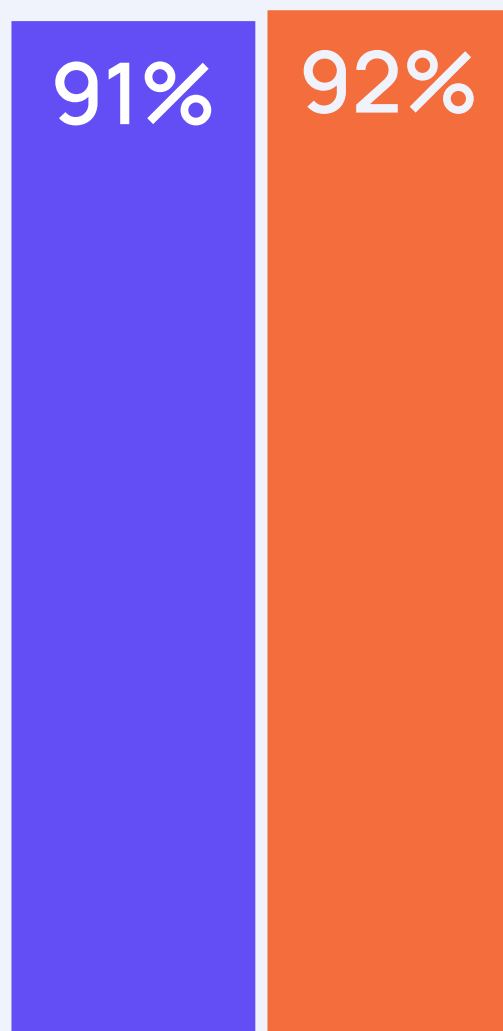
Total Favorability  
(very/somewhat)



Total Consideration  
(very/somewhat likely to use)



Total Took Action  
(looked online/used/  
purchased)



Total Sample

Past Week Users

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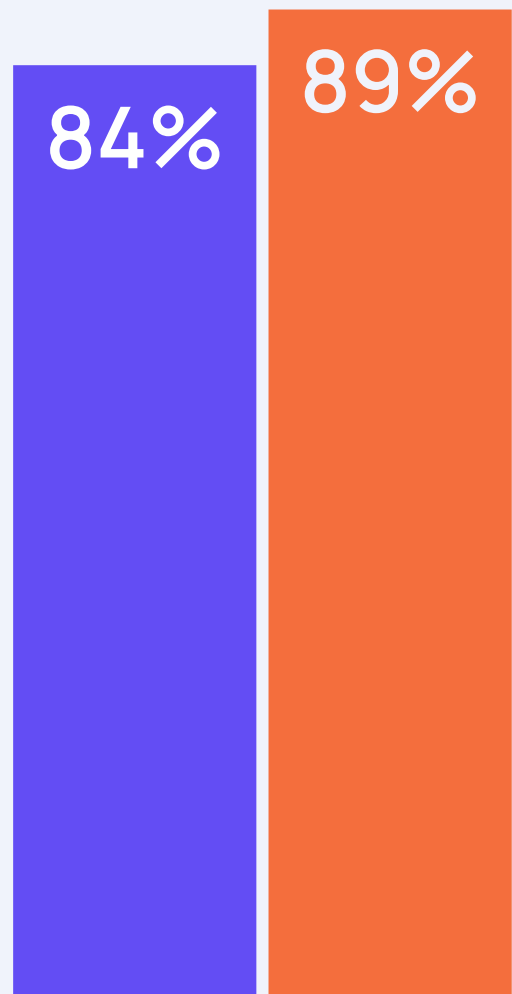
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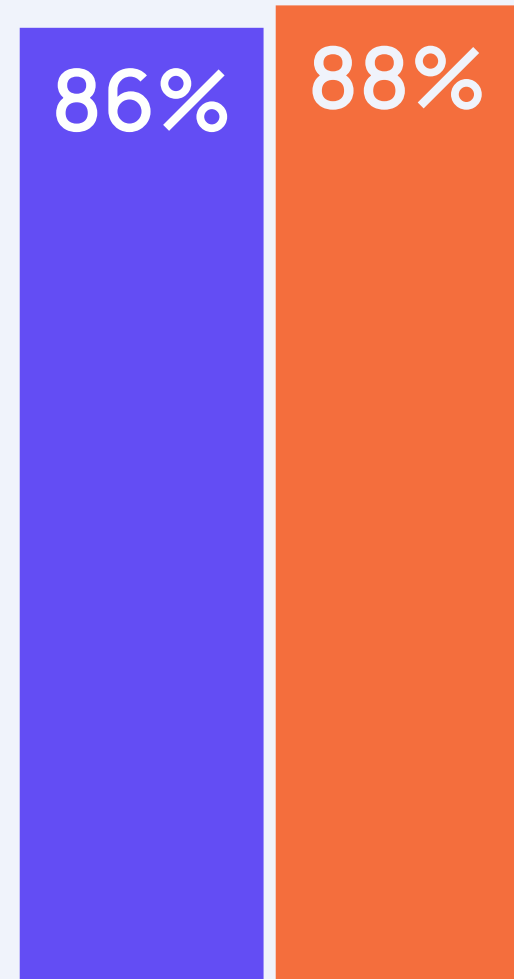
# Brand Metrics: Amazon (Podcast)



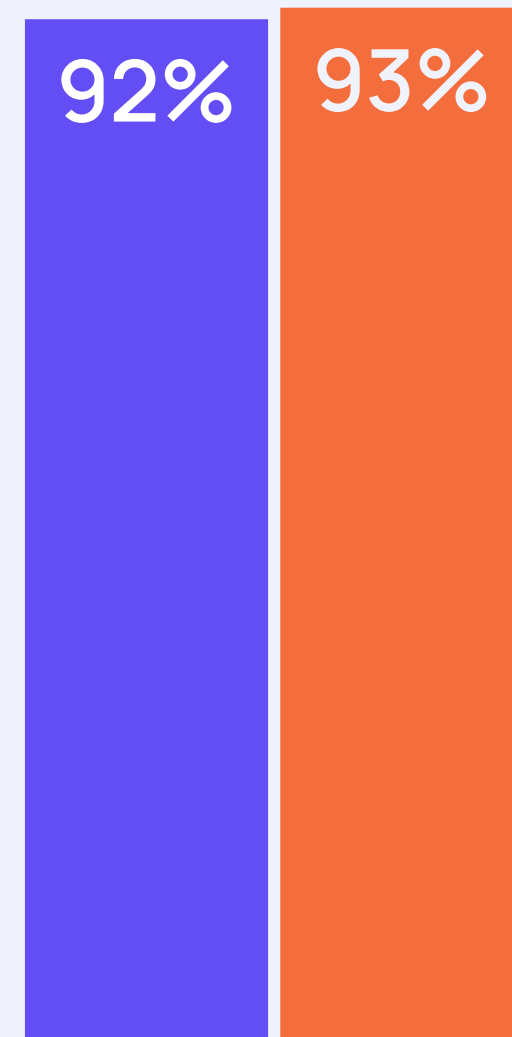
Awareness



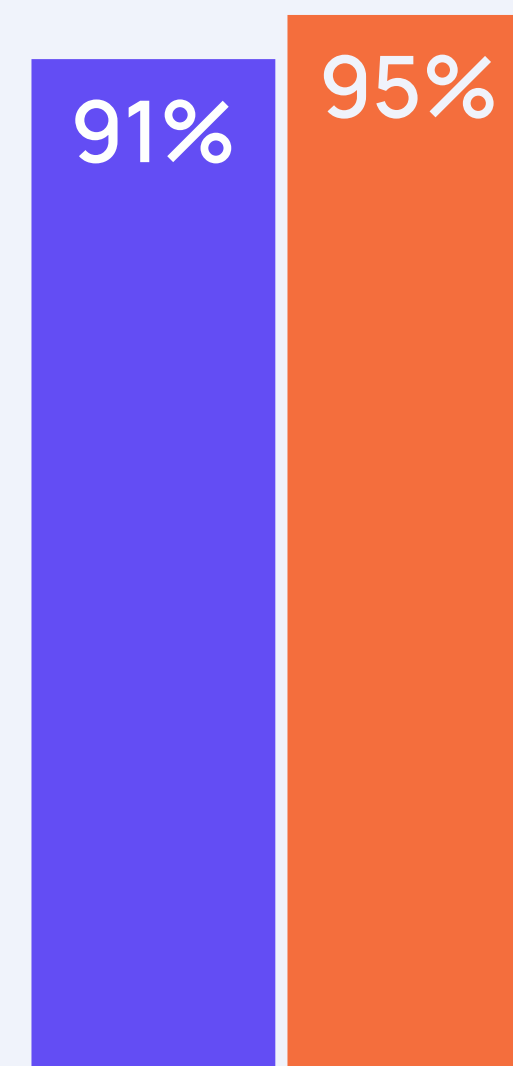
Total Favorability  
(very/somewhat)



Total Consideration  
(very/somewhat likely to use)



Total Took Action  
(looked online/used/  
purchased)



Total Sample

Past Week Users

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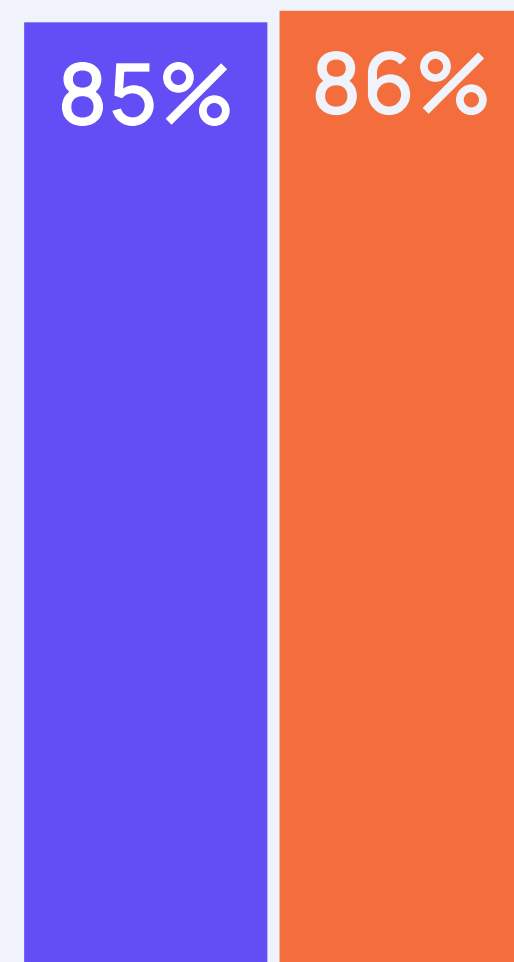
Paramount

Signal  
Insights

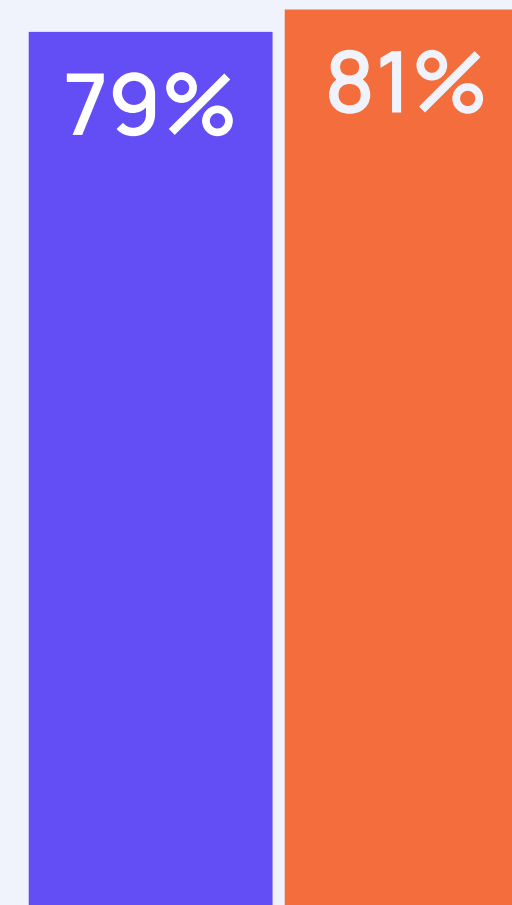
# Brand Metrics: Walmart (Streaming TV)



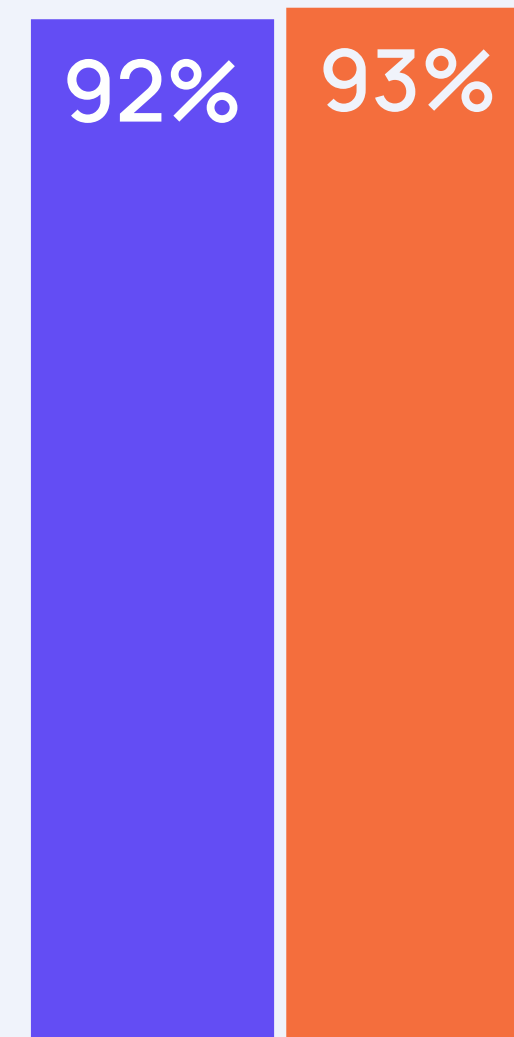
Awareness



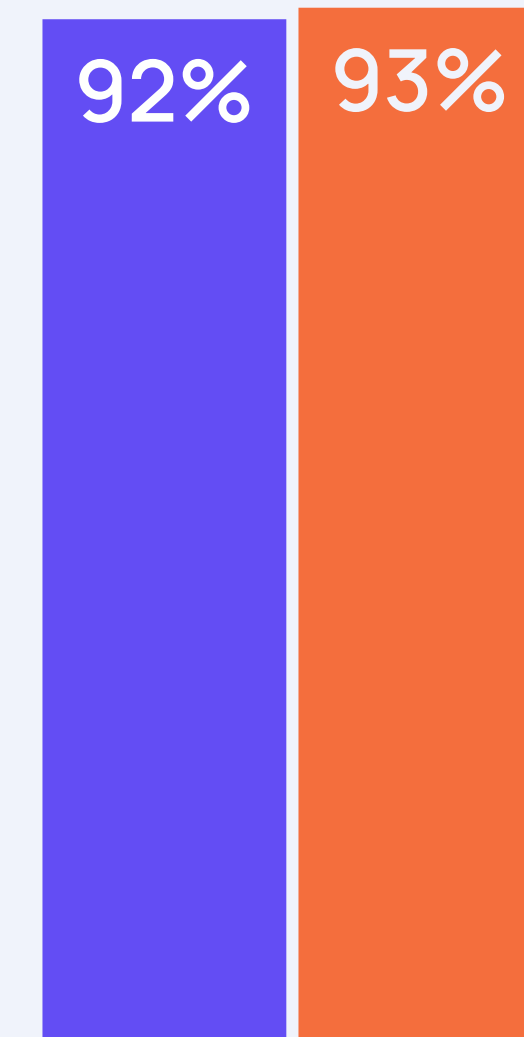
Total Favorability  
(very/somewhat)



Total Consideration  
(very/somewhat likely to use)



Total Took Action  
(looked online/used/  
purchased)



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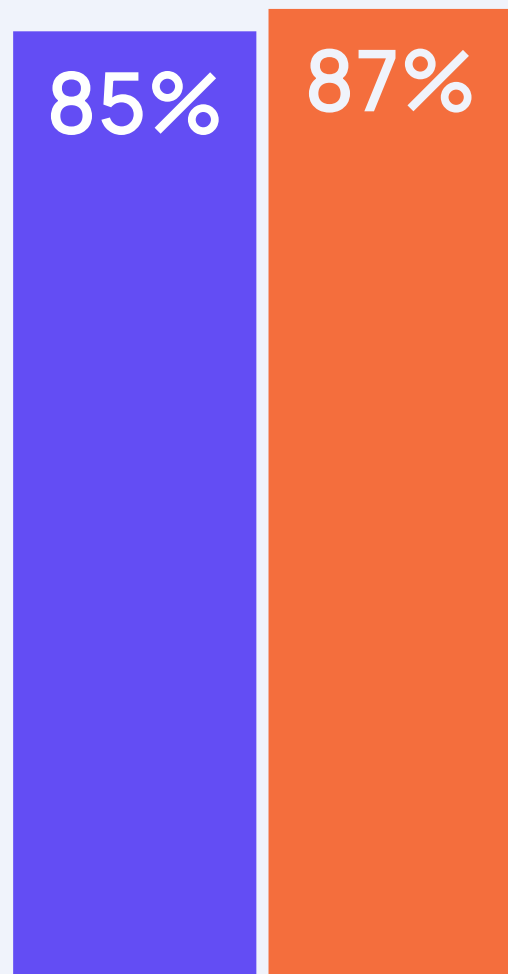
Signal  
Insights



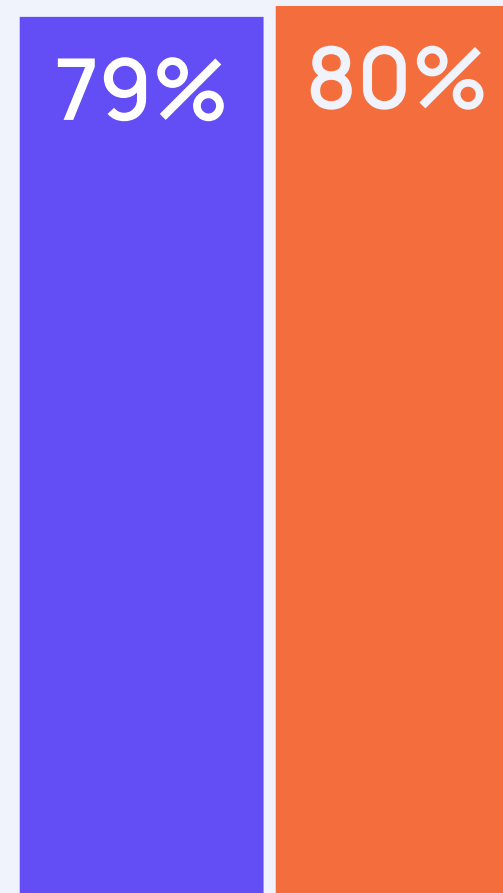
# Brand Metrics: Walmart (YouTube)



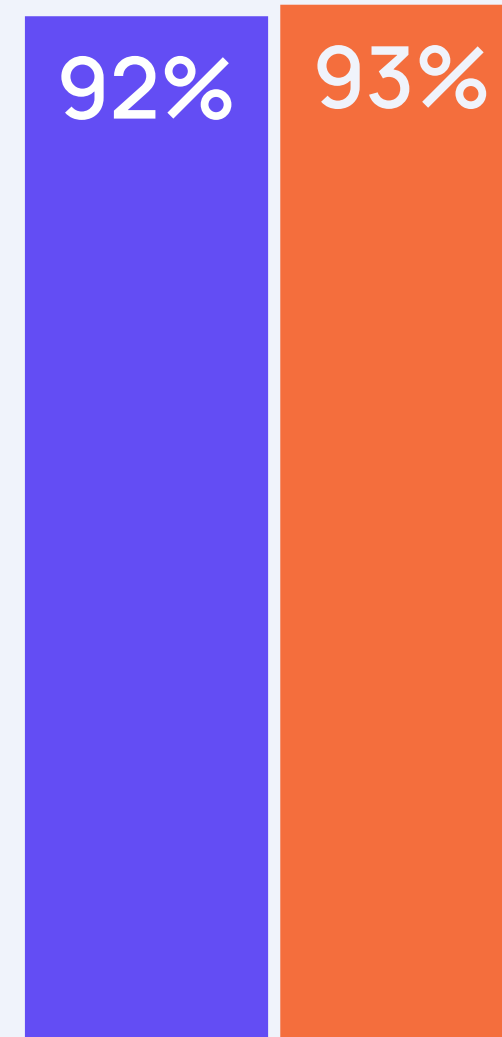
Awareness



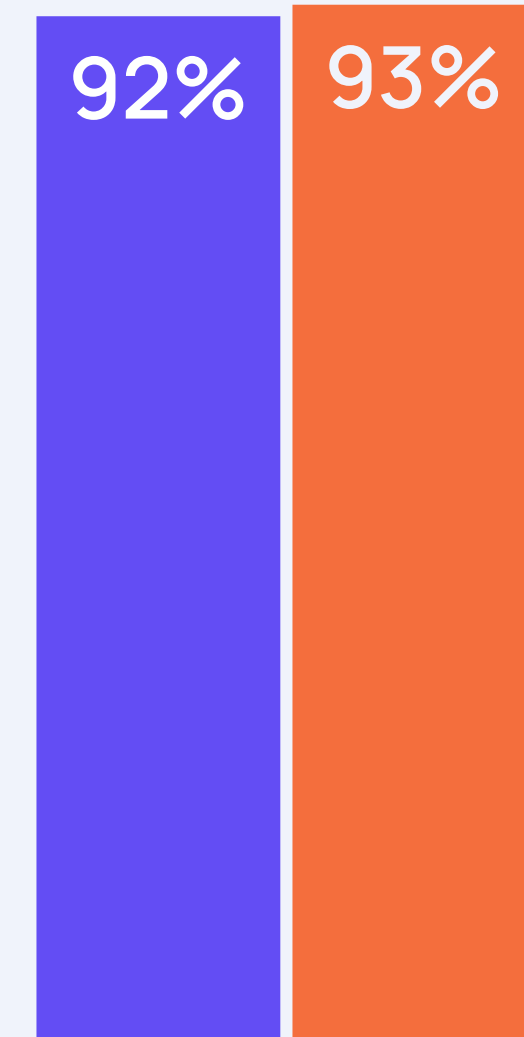
Total Favorability  
(very/somewhat)



Total Consideration  
(very/somewhat likely to use)



Total Took Action  
(looked online/used/  
purchased)



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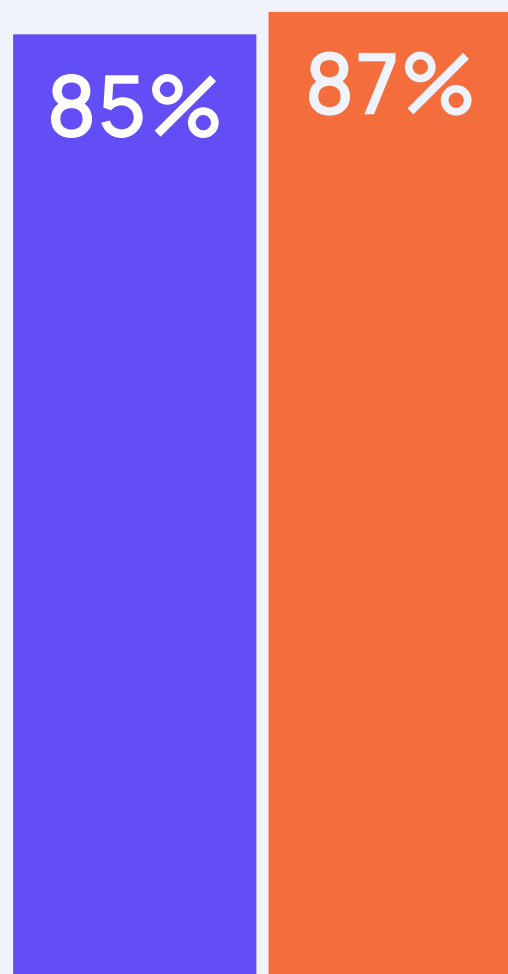
Paramount

Signal  
Insights

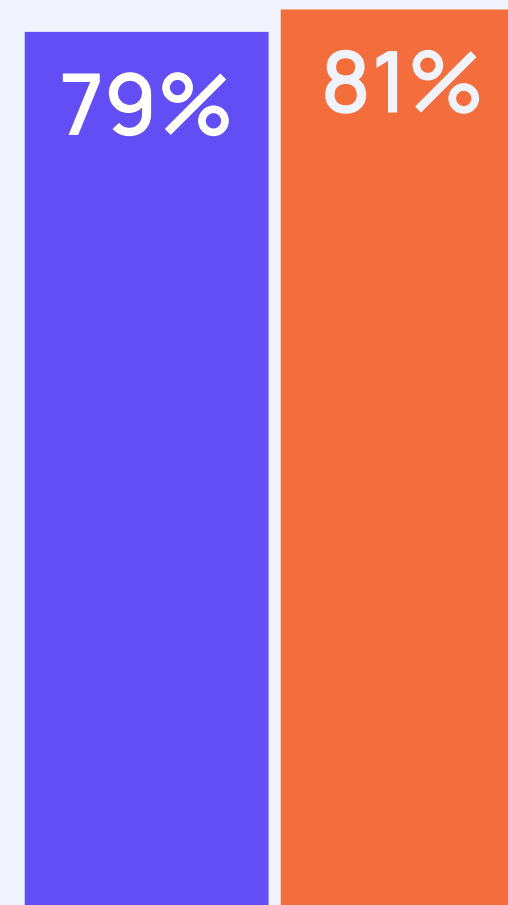
# Brand Metrics: Walmart (Podcast)



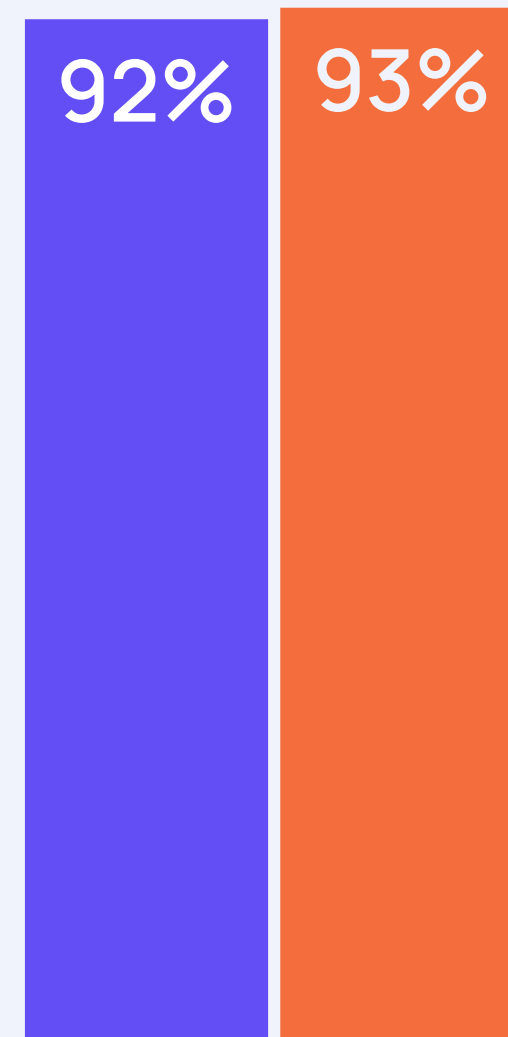
Awareness



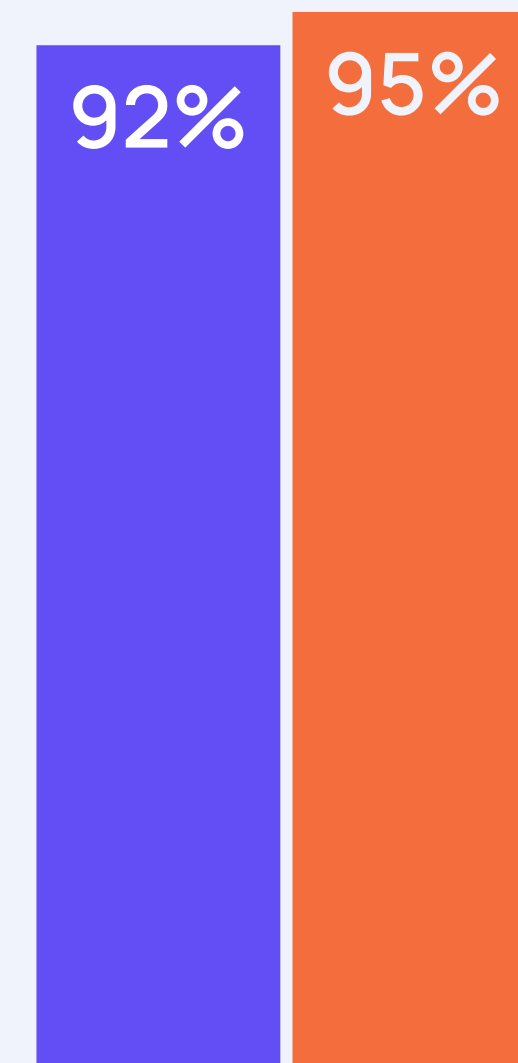
Total Favorability  
(very/somewhat)



Total Consideration  
(very/somewhat likely to use)



Total Took Action  
(looked online/used/  
purchased)



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# Brand Metrics: Geico (Streaming TV)

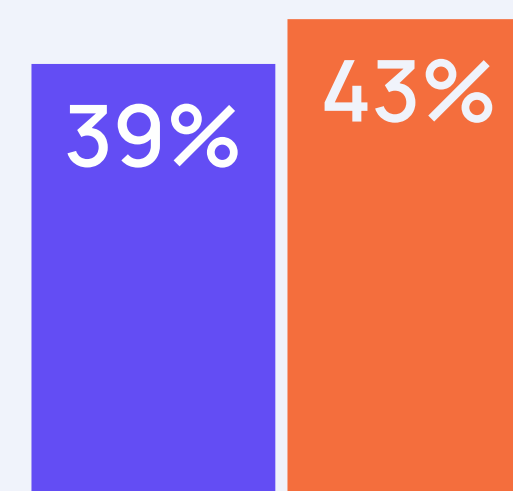
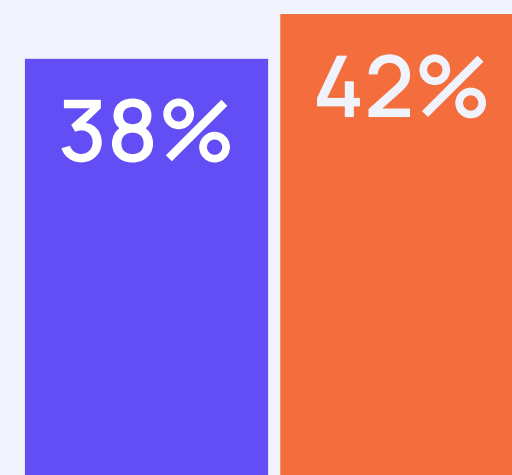
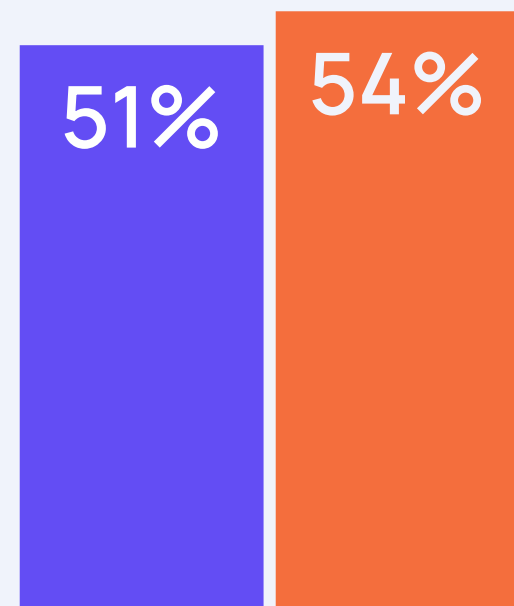
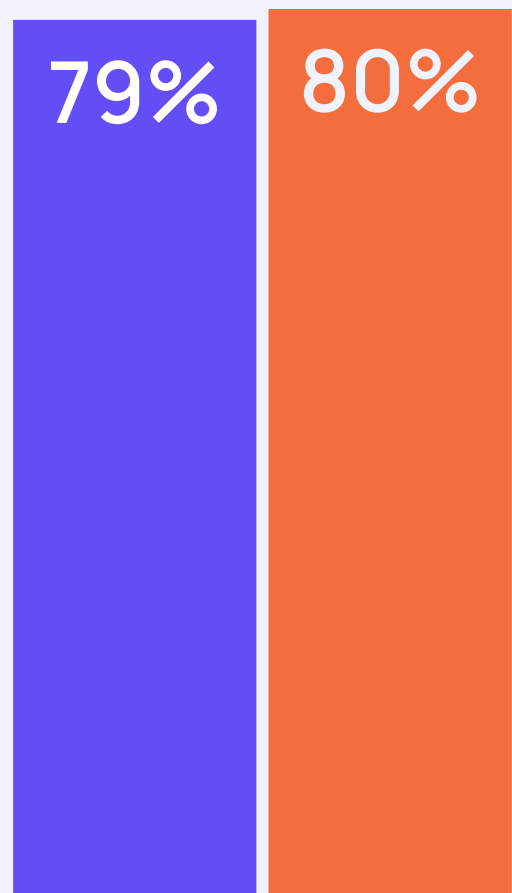


Awareness

Total Favorability  
(very/somewhat)

Total Consideration  
(very/somewhat likely to use)

Total Took Action  
(looked online/used/  
purchased)



Total Sample

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# Brand Metrics: Geico (YouTube)

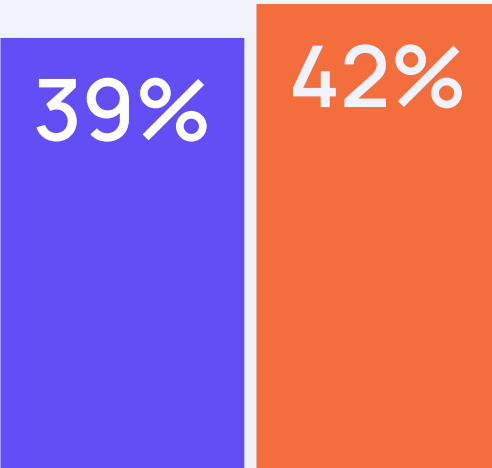
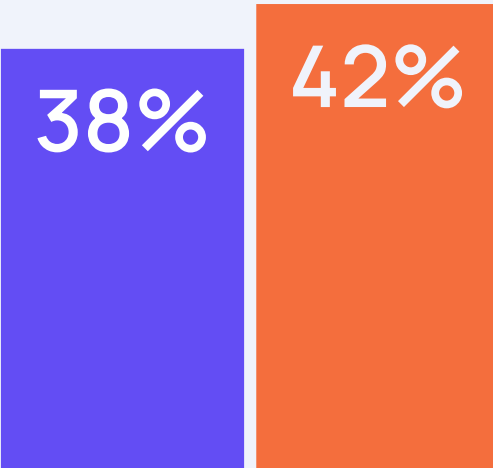
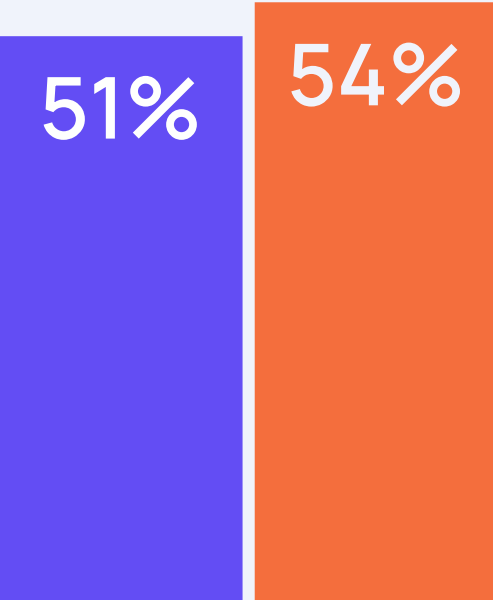
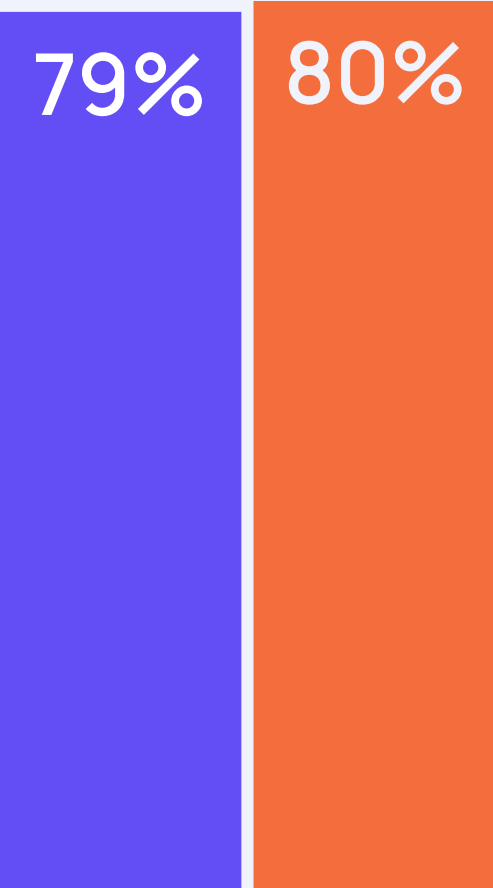


Awareness

Total Favorability  
(very/somewhat)

Total Consideration  
(very/somewhat likely to use)

Total Took Action  
(looked online/used/  
purchased)



Total Sample

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# Brand Metrics: Geico (Podcast)

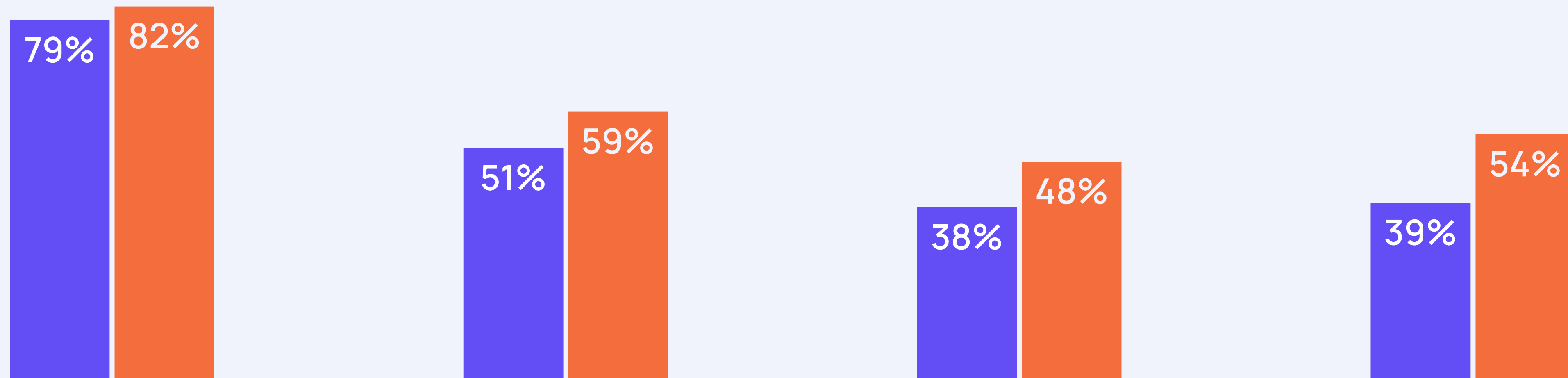


Awareness

Total Favorability  
(very/somewhat)

Total Consideration  
(very/somewhat likely to use)

Total Took Action  
(looked online/used/  
purchased)



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# Brand Metrics: State Farm (Streaming TV)

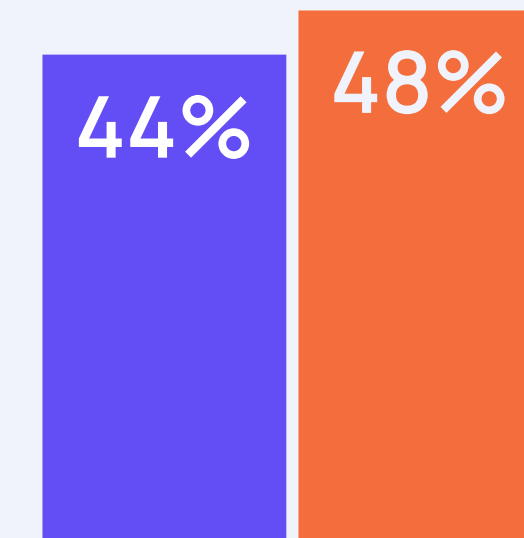
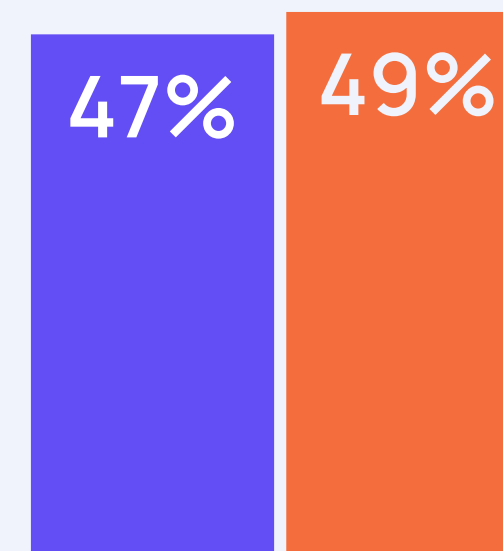
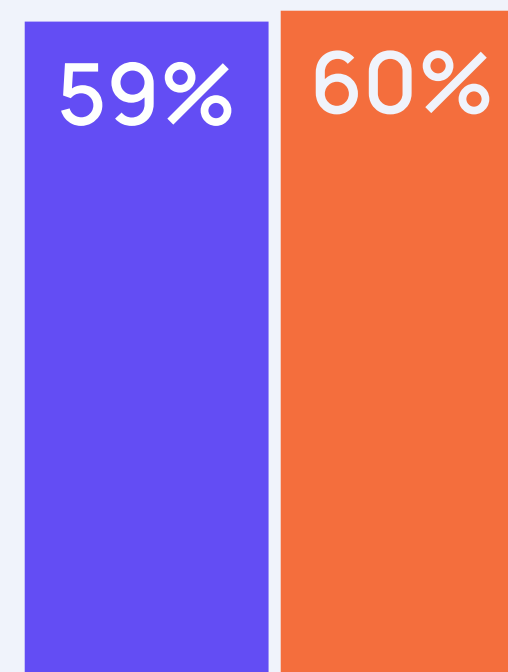
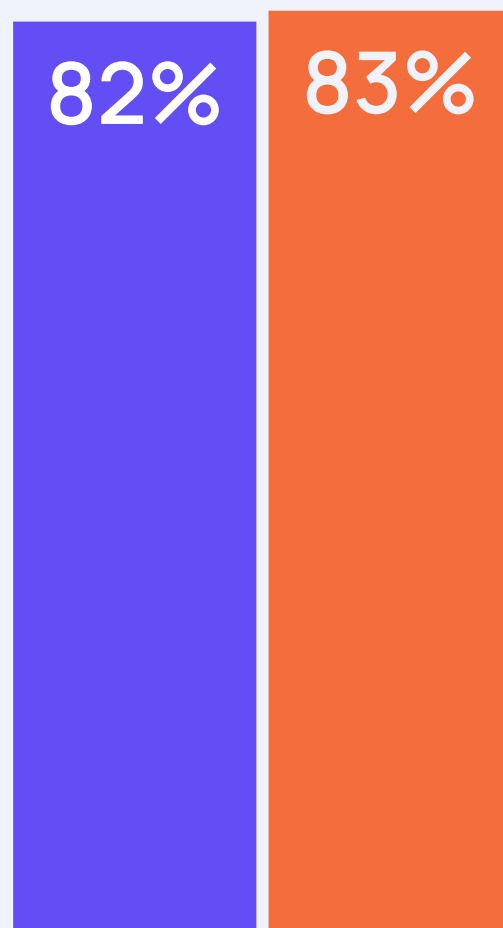


Awareness

Total Favorability  
(very/somewhat)

Total Consideration  
(very/somewhat likely to use)

Total Took Action  
(looked online/used/  
purchased)



Total Sample

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# Brand Metrics: State Farm (YouTube)

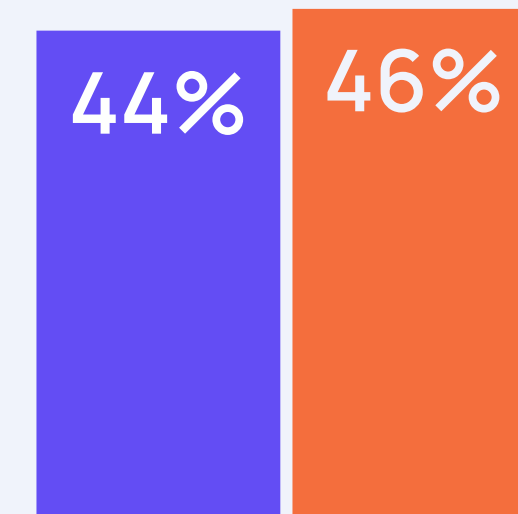
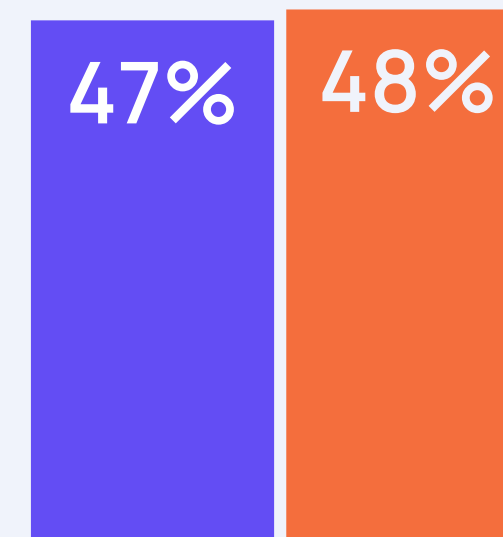
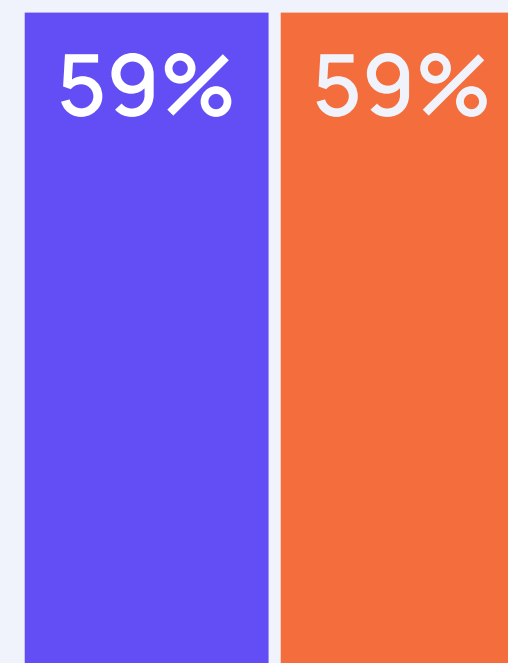
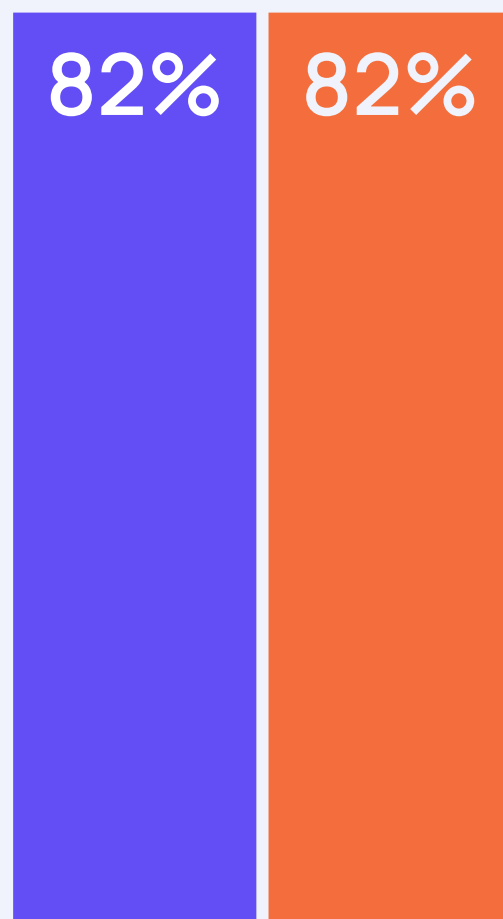


Awareness

Total Favorability  
(very/somewhat)

Total Consideration  
(very/somewhat likely to use)

Total Took Action  
(looked online/used/  
purchased)



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# Brand Metrics: State Farm (Podcast)

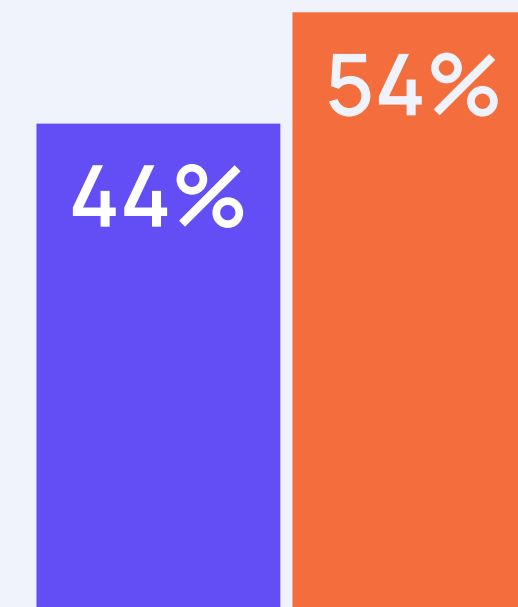
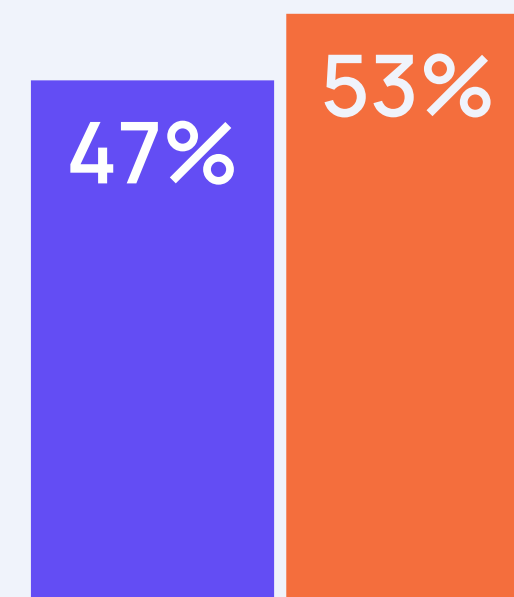
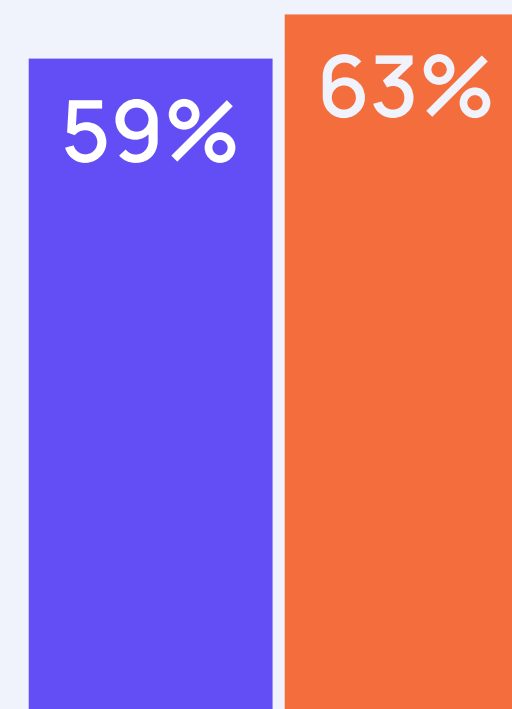
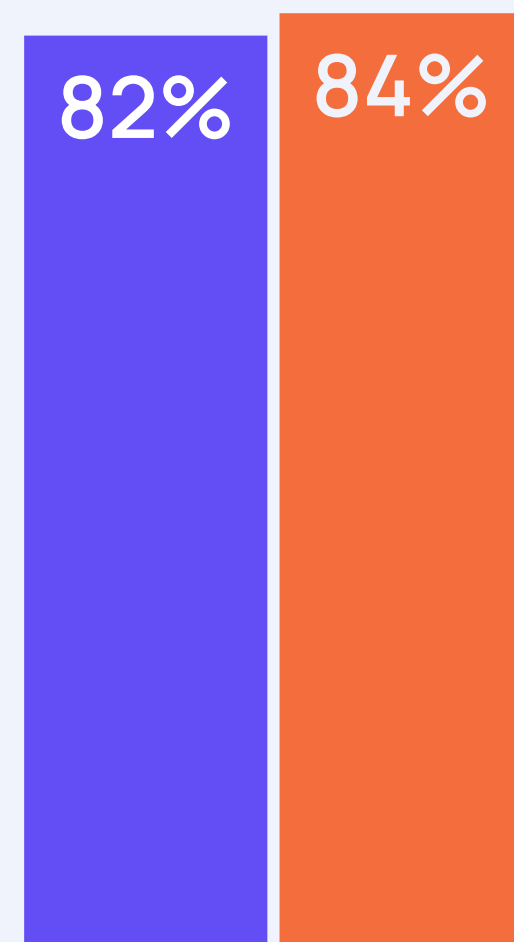


Awareness

Total Favorability  
(very/somewhat)

Total Consideration  
(very/somewhat likely to use)

Total Took Action  
(looked online/used/  
purchased)



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# Brand Metrics: HelloFresh (Streaming TV)

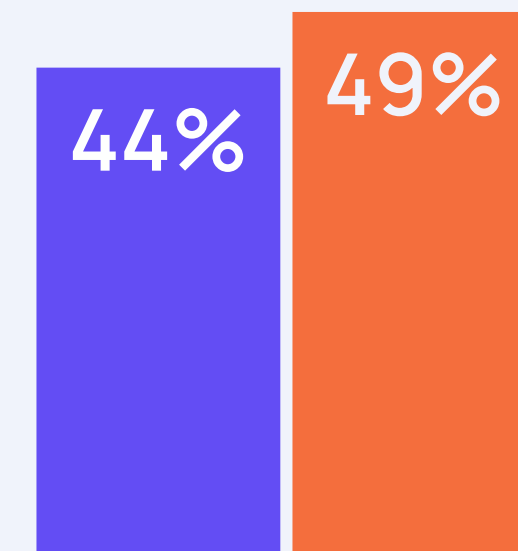
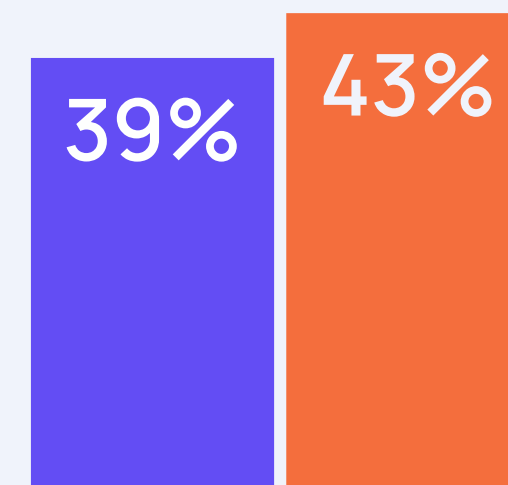
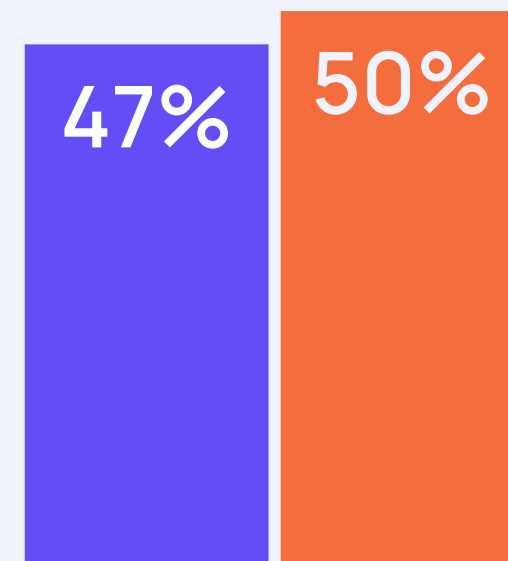
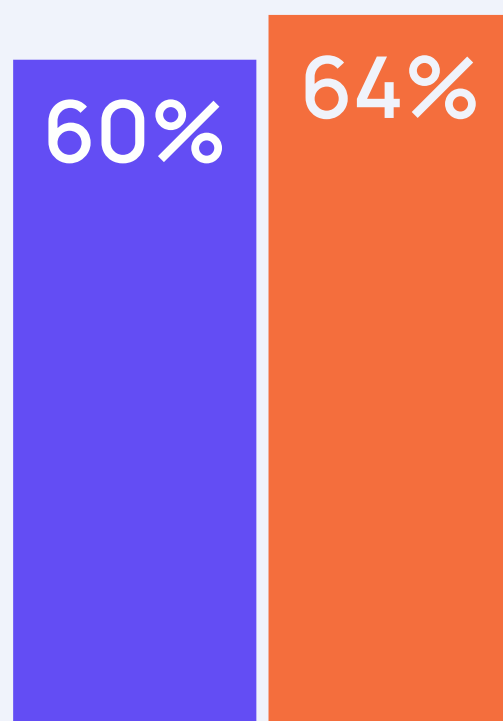


Awareness

Total Favorability  
(very/somewhat)

Total Consideration  
(very/somewhat likely to use)

Total Took Action  
(looked online/used/  
purchased)



Total Sample

Past Week Users

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# Brand Metrics: HelloFresh (YouTube)

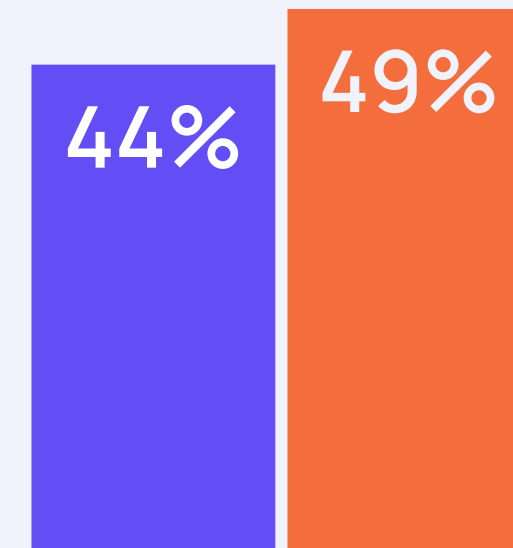
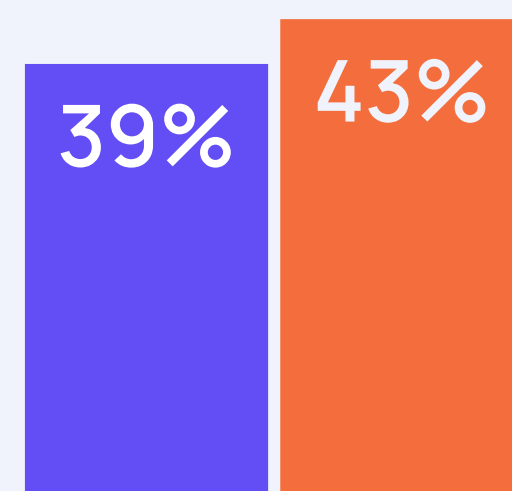
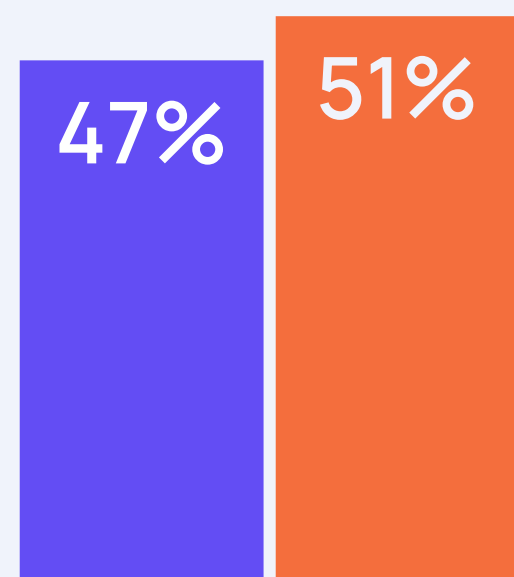
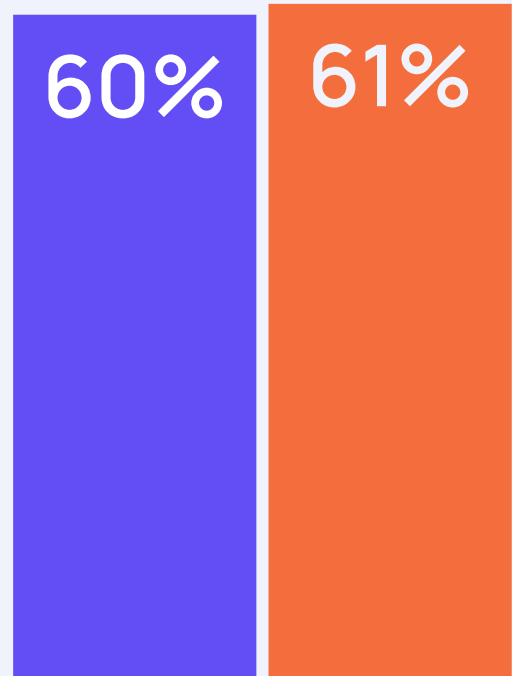


Awareness

Total Favorability  
(very/somewhat)

Total Consideration  
(very/somewhat likely to use)

Total Took Action  
(looked online/used/  
purchased)



Total Sample

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# Brand Metrics: HelloFresh (Podcast)

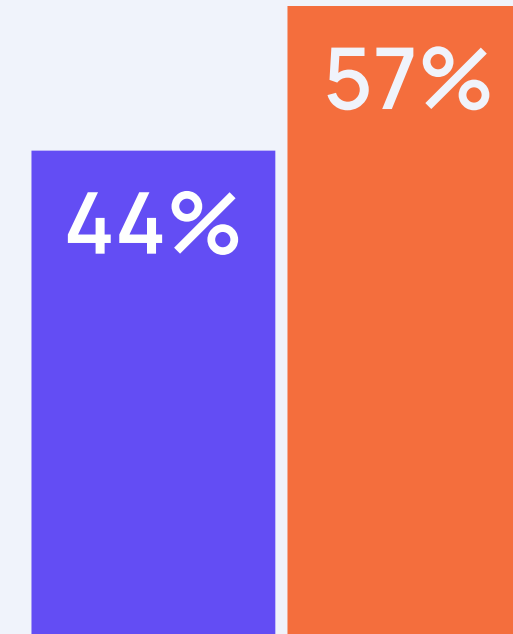
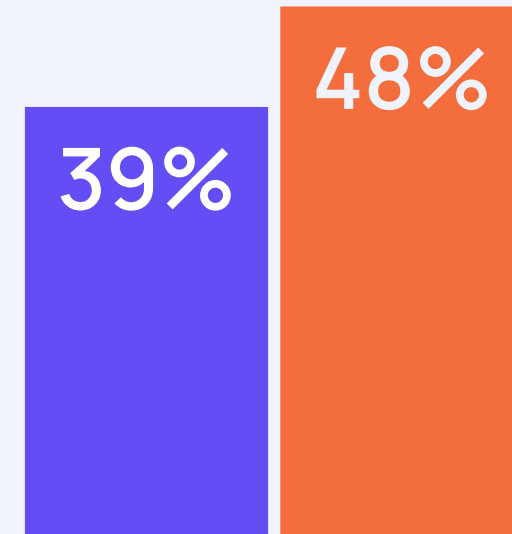
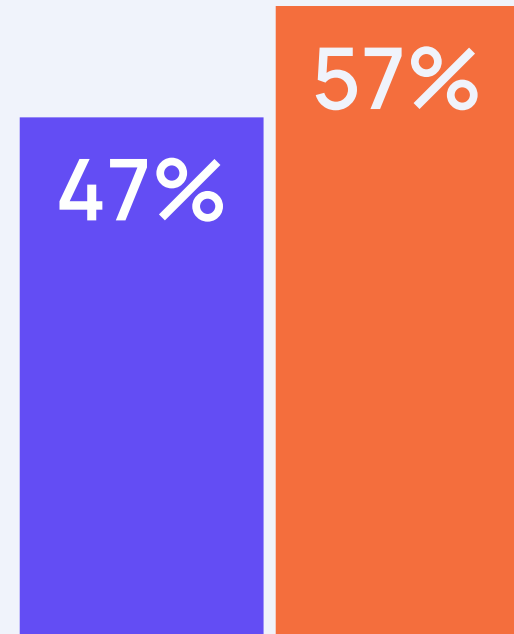
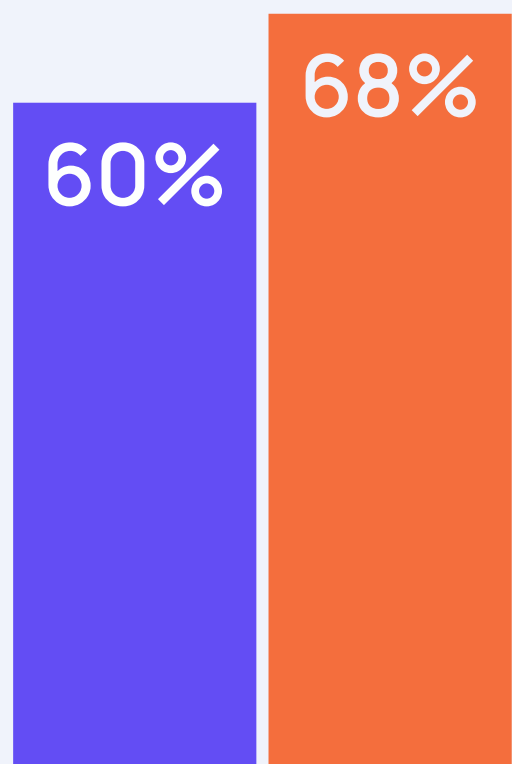


Awareness

Total Favorability  
(very/somewhat)

Total Consideration  
(very/somewhat likely to use)

Total Took Action  
(looked online/used/  
purchased)



Total Sample

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# Past week podcast listeners score higher than the average American adult on most brand measures, especially mid and lower funnel

Difference in brand measures between past week users and the average among American adults

	UPPER FUNNEL			MID-FUNNEL			LOWER FUNNEL					
	Awareness			Favorability*			Consideration*			Took Action*		
	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts
Amazon	2%	2%	5%	2%	1%	2%	1%	1%	0%	2%	2%	4%
Walmart	2%	3%	3%	-5%	-6%	-5%	1%	1%	1%	2%	2%	4%
GEICO	1%	1%	3%	3%	3%	8%	4%	4%	10%	5%	3%	15%
State Farm	2%	1%	3%	2%	1%	5%	2%	1%	6%	3%	1%	10%
HelloFresh	4%	2%	9%	3%	4%	10%	4%	4%	9%	5%	4%	13%
AVERAGE	2%	2%	5%	1%	1%	4%	3%	2%	5%	3%	3%	9%

\* Among respondents aware of brand

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# For all five brands, Podcast listeners led the way in positive differential between weekly users of each medium and the total population

Difference in brand measures between past week users and the average among American adults

	UPPER FUNNEL			MID-FUNNEL			LOWER FUNNEL					
	Awareness			Favorability*			Consideration			Took Action		
	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts
Amazon	2%	2%	5%	2%	1%	2%	1%	1%	0%	2%	2%	4%
Walmart	2%	3%	3%	-5%	-6%	-5%	1%	1%	1%	2%	2%	4%
GEICO	1%	1%	3%	3%	3%	8%	4%	4%	10%	5%	3%	15%
State Farm	2%	1%	3%	2%	1%	5%	2%	1%	6%	3%	1%	10%
HelloFresh	4%	2%	9%	3%	4%	10%	4%	4%	9%	5%	4%	13%
AVERAGE	2%	2%	5%	1%	1%	4%	3%	2%	5%	3%	3%	9%

\* Among respondents aware of brand

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# The average positive differentials for all five brands were also led by weekly podcast listeners in **every brand metric tested**

Difference in brand measures between past week users and the average among American adults

	UPPER FUNNEL			MID-FUNNEL			LOWER FUNNEL					
	Awareness			Favorability*			Consideration			Took Action		
	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts
Amazon	2%	2%	5%	2%	1%	2%	1%	1%	0%	2%	2%	4%
Walmart	2%	3%	3%	-5%	-6%	-5%	1%	1%	1%	2%	2%	4%
GEICO	1%	1%	3%	3%	3%	8%	4%	4%	10%	5%	3%	15%
State Farm	2%	1%	3%	2%	1%	5%	2%	1%	6%	3%	1%	10%
HelloFresh	4%	2%	9%	3%	4%	10%	4%	4%	9%	5%	4%	13%
<b>AVERAGE</b>	<b>2%</b>	<b>2%</b>	<b>5%</b>	<b>1%</b>	<b>1%</b>	<b>4%</b>	<b>3%</b>	<b>2%</b>	<b>5%</b>	<b>3%</b>	<b>3%</b>	<b>9%</b>

\* Among respondents aware of brand

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# The average positive differentials for all five brands were also led by weekly podcast listeners in **every brand metric tested**

Difference in brand measures between past week users and the average among American adults

	UPPER FUNNEL			MID-FUNNEL			LOWER FUNNEL					
	Awareness			Favorability*			Consideration			Took Action		
	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts	CTV	YouTube	Podcasts
AVERAGE	2%	2%	5%	1%	1%	4%	3%	2%	5%	3%	3%	9%

\* Among respondents aware of brand

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Attracting Consumer Attention in a Sea of Ads

April 2024

