

YOUR PARTNER TO NAVIGATE AUDIO

Today's Audio Landscape. Navigating Radio Across Platforms. Data & Insights.
Working Together

RADIO

Radio across platforms provides the targeted, trusted and immersive media environment to reach and engage consumers with the power of a brands' voice.



**RADIO
UNITES**



**RADIO
HELPS**



**RADIO
INFORMS**



**RADIO
ENTERTAINS**



**RADIO DRIVES
RESULTS**

99%

of marketers polled indicate that REACH is important or very important to their brands media strategy.

Only 31 percent of marketers knew Radio is the No. 1 Reach Medium.

THE MEDIA UNIVERSE

P18+ WEEKLY REACH



SOCIAL MEDIA

THE CONSUMER



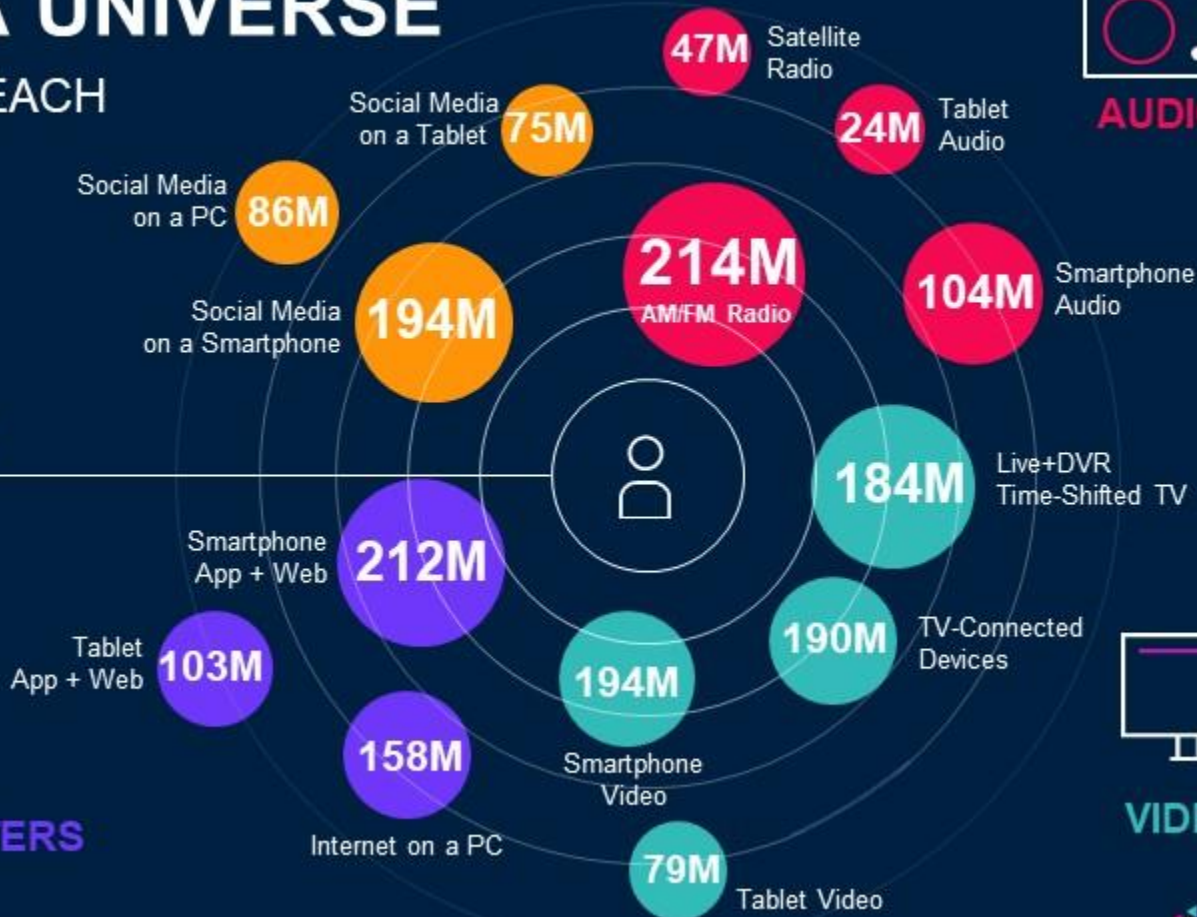
MOBILE & COMPUTERS



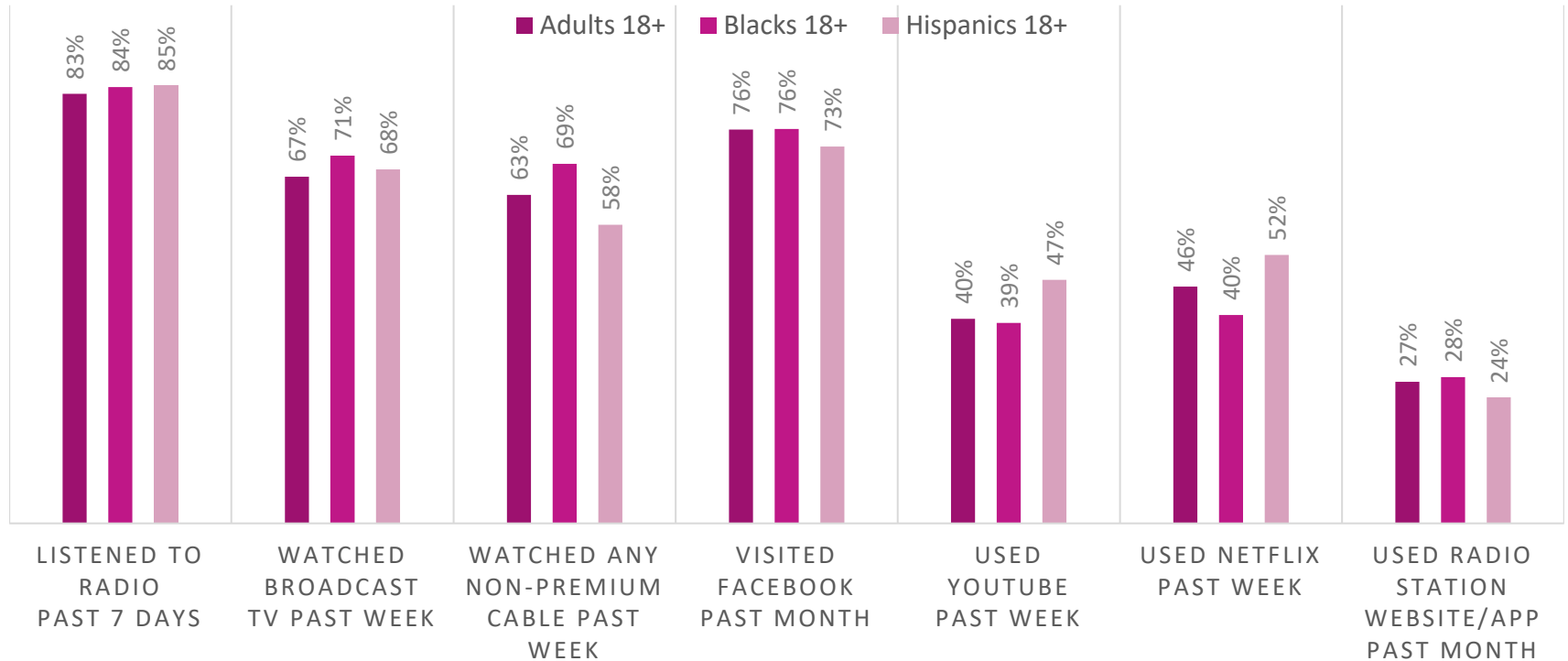
AUDIO



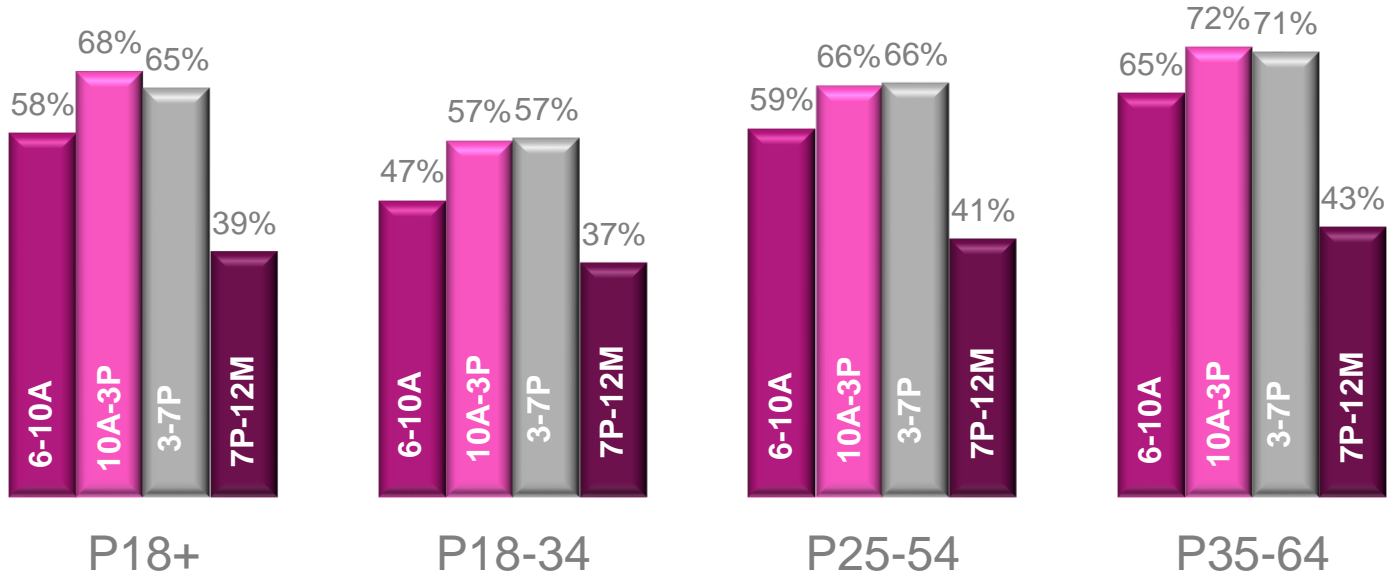
VIDEO



Highest reach among media options



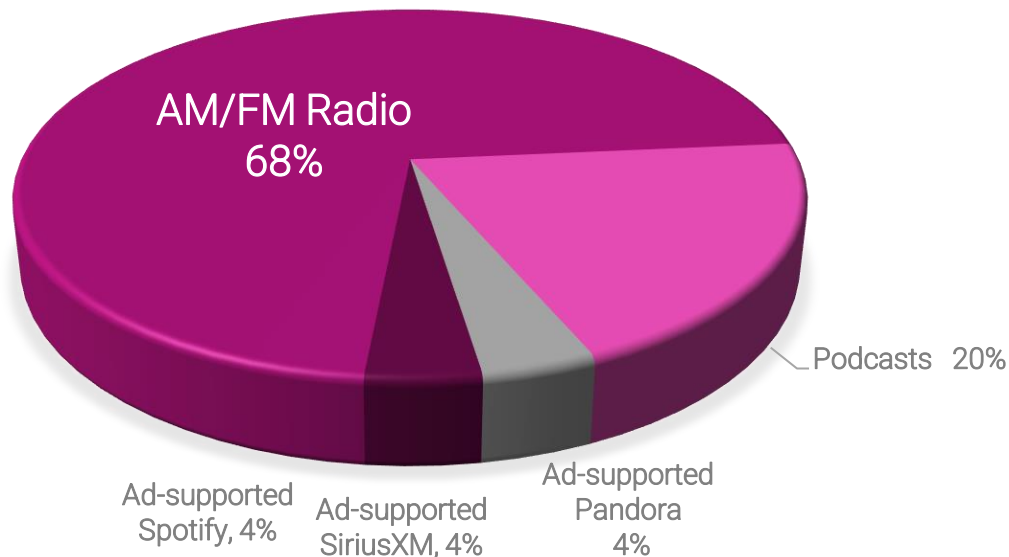
Radio peaks during the day



Radio remains king of the audio universe

SHARE OF AD-SUPPORTED TIME SPENT AMONG P18+

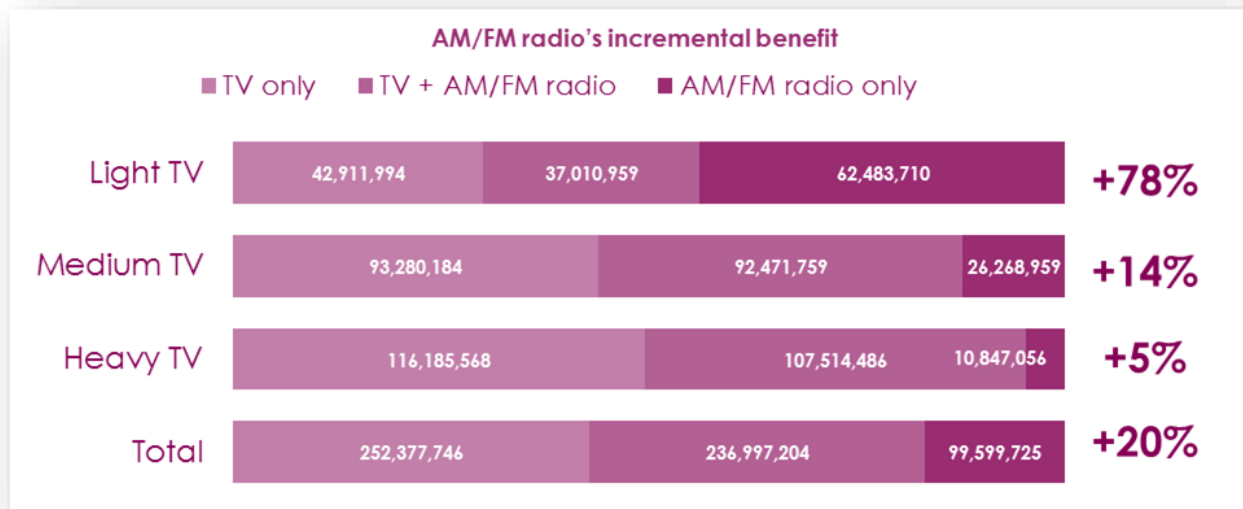
AM/FM radio accounts for 68% of the daily audio time spent with any ad-supported platform.



49% of persons
25-54 are light TV
viewers
generating only
9% of total TV
time spent

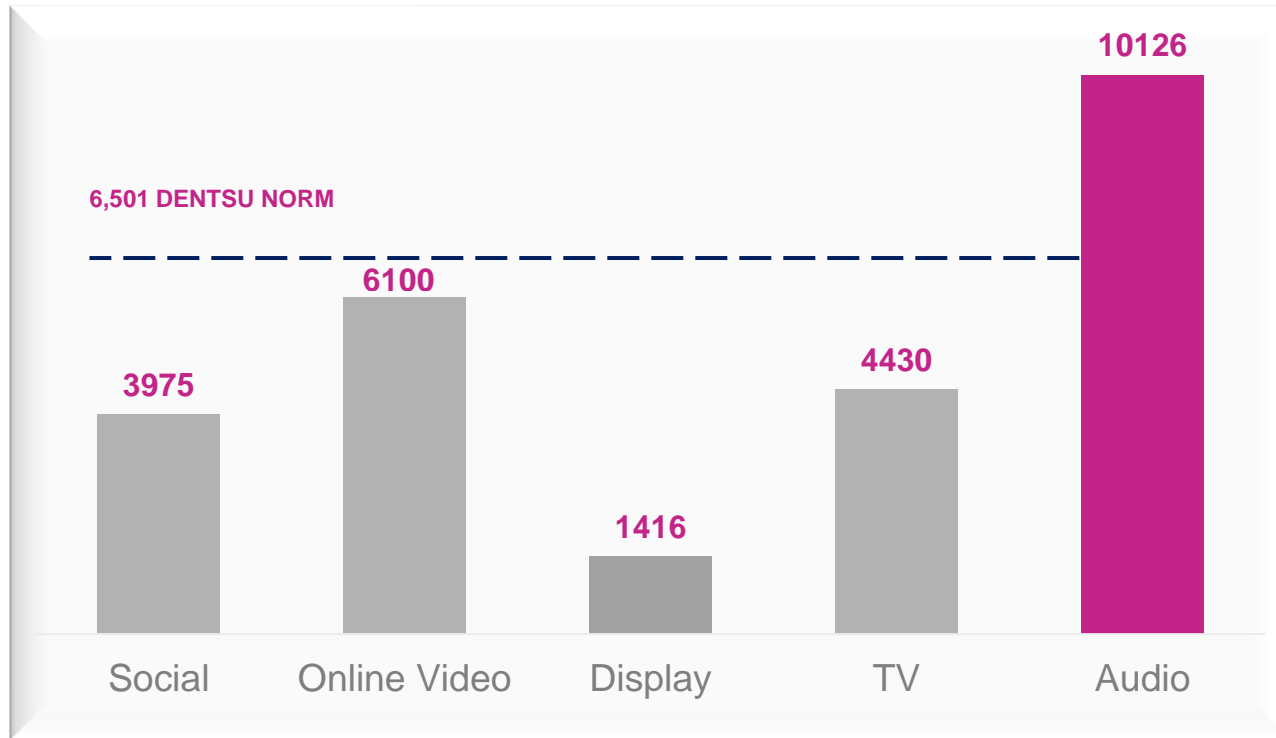
AM/FM radio
reaches 90% of
America's light
TV viewers.

Radio is the Solution to Reach **Light TV Viewers**



Audio drives attention **attention drives sales**

Audio drives more attention than TV and digital **Average Attention Seconds | Per (000) by Channel - APM**



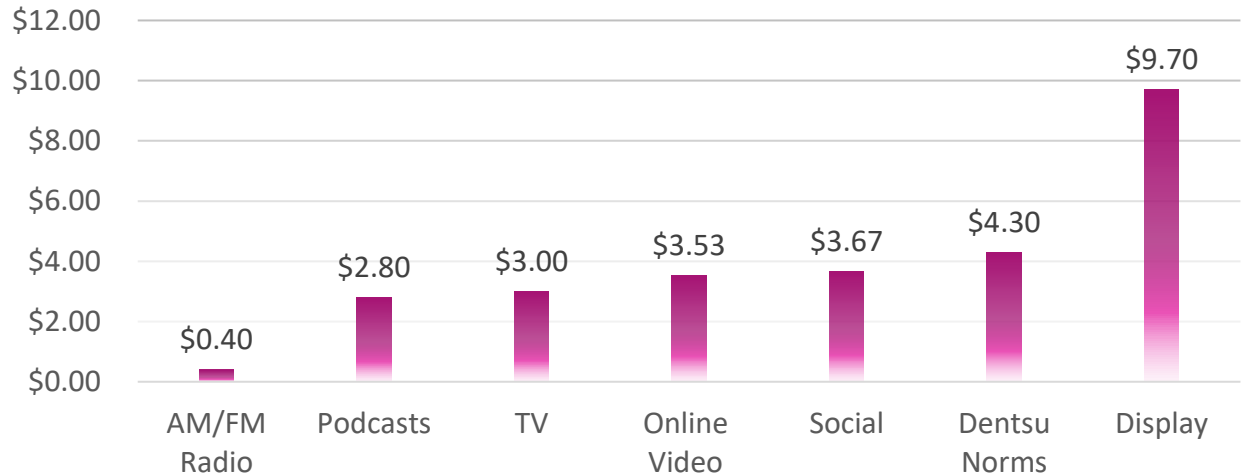
How to read:

For every 1,000 impressions, Audio delivers more attentive seconds. Example: Per 1,000 impressions, Audio delivers 10K+ attentive seconds, while TV delivers 4K+

Radio drives **efficiency**

Radio is the **most efficient** platform at driving attention and at the **lowest cost**.

ACPM: ATTENTION COST PER 1,000 IMPRESSIONS



TRUST

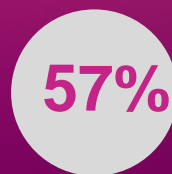
Radio is the most trusted medium, **2X** more trustworthy than social media.



**TRUST
RADIO**



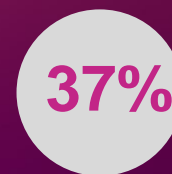
**TRUST
TELEVISION**



**TRUST
WEBSITES**



**TRUST
TWITTER**



**TRUST
FACEBOOK**

Deep consumer **connections**

55% listen to commercials more often on radio and podcasts.

53% think radio and podcast ads are more relevant.

51% say radio and podcast advertisers are more trusting.

Radio's personalities are trusted influencers

60%

of radio listeners tune in because of the radio hosts on-air.

81%

of listeners consider on-air personalities a friend, family member or acquaintance.

84%

would follow their radio personality if they went to another radio station.

83%

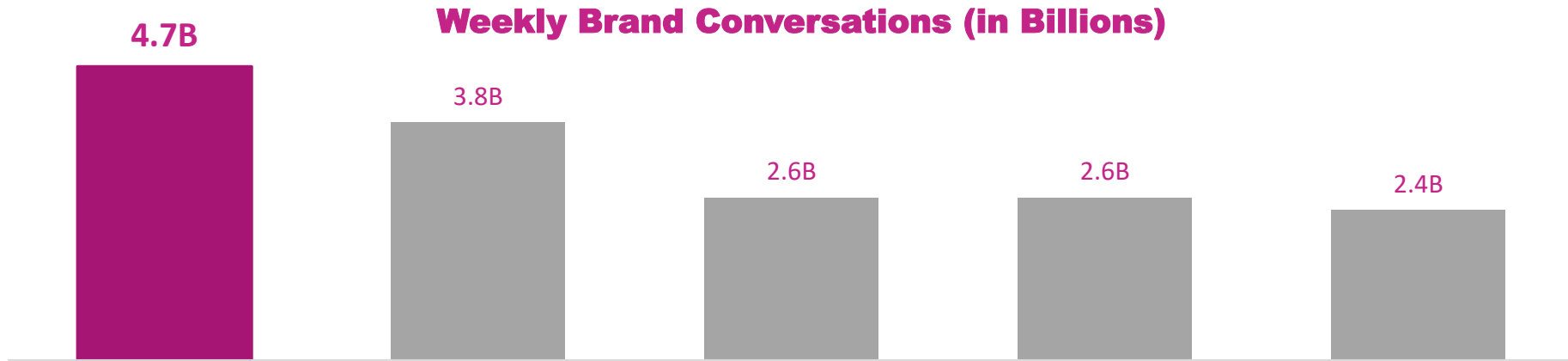
of listeners value and trust their favorite personality's opinion.

71%

Gen Z's and Millennials are interested in connecting with their favorite on-air personalities.

Radio Drives **Brand Conversation**

Heavy radio listeners have more brand conversations than heavy users of any other media



Digital platforms **continue to grow**



HD RADIO

95MM+ HD Radio receivers in the market.



PODCASTS

241MM Americans are familiar with a podcast.



STREAMING

Over 15,000 radio station websites
135MM P12+ have listened in the past month.



SMART SPEAKERS

AM/FM radio has the largest ad-supported share of time spent on smart speakers among P13+

Fueling the audio **content economy**

Broadcast Radio



Targeted.
Trusted.
#1 Reach Medium

Podcast
Storytellers

Over 2MM podcasts with over 48MM episodes
Radio podcast networks consistently top 5 creators/distributors

Social
Influencers

Instagram, Facebook, Twitter, YouTube Micro and Celebrity Influencers
Radio personalities with hundreds of millions of followers
1.4 billion social videos have the hashtag #radio

Video
Content

Audio radio digital video content surging.
YouTube has become top platform for radio and podcast content.

Marketing industry **trends**

Challenges & Opportunities

Challenging market

- CMO's are lacking budgets to fully execute their strategies due to inflationary pressures.
 - “Marketing budget as a percentage of company budget continues to drop to 10.2%, nearing a pandemic low of 9.8%.” CMO Survey 2024
- Television viewing continues to experience significant erosion.
- OTT and streaming content distributors are reorganizing, merging, consolidating and cutting staff due to consumer fatigue and increasing subscription costs.
- Marketers, agencies and media companies are cutting jobs and struggling with media fragmentation.
- Continued focus on authenticity, humanity and inclusivity.

RADIO

Poised to drive growth



**RADIO
IS EFFICIENT**



**RADIO
HAS SCALE**



**RADIO
IS AUTHENTIC, LOCAL
HUMAN**



**RADIO
IS EVERYWHERE**



**RADIO
IS TRUSTED**



**RADIO
IS FREE AND
REGULATED**

Trends & opportunities

Growth Categories	AI	Programmatic	Chat GPT
Companion Visual	Conversation to Commerce	Addressability	Metaverse
Precision Targeting	Focused Impressions	Attribution	First Party Data
Retail Media Networks	Podcasts	Influencer Marketing	Digital

Radio's targeting capabilities



- Mass reach (one to many)
- Branding/top of the funnel
- Genres/format targetability
- Demographics & Psychographics
- Geography
- Content alignment
- Influencer marketing
- Real time optimization
- In-vehicle HD Radio visual



- GEO fencing & IP tracking
- Genres/format targetability
- Content interactivity
- Visual
- OTT/Pre-roll
- Demographics
- Real Time Optimization
- Attribution



- Contextual and behavioral targetability
- Retargeting
- Real Time Optimization
- Dynamic Ad Insertion
- One to one messaging
- Connect to commerce
- Attribution



- Contextual and behavioral targetability
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Engaging the ears & the eyes

Technology enabling visual and text programming. Synced with the audio message

Radio commercials paired with in-car dash visuals significantly enhance commercial impact.

- Those who recalled a major retailers in-car visual were 12% more likely to visit the store.
- Texts for a local auto wash brand achieved more submissions than any other campaign in the market.



Smart conversations **drive sales**

Enablement of conversational and actionable audio advertising through smart speakers.

The smart speaker hears the broadcast and invites continued conversation.

46%

of listeners who heard an ad for Pizza Hut spoke to their Alexa device, engaged in a dialogue which led to receiving a discount code on their phone.

19%

of listeners who heard a prompt to sign up for an Infiniti test drive, expressed interest.

1.2%

voice click (voice CTR/impression to Skill conversion) among listeners who heard a podcast ad for the NBC show, Quantum Leap. Skill engaged listeners with an Alexa voice experience to learn more about the show and requested a link to their smartphone to download the NBC app.

Social acceleration

4K radio social posts for 510 brands drove over 100,000 engagements in three months.



Instagram

Grubhub & Power 105.1FM

7 Instagram posts averaged 15X more engagement per post than GrubHub posts



X

Tullamore DEW & 98.7 FM ESPN

Over 35% in brand mentions on Twitter compared to Tully norms for a contest promotion.



Facebook

San Diego County Credit Union & KROQ

KROQ's 4 Facebook posts averaged 64% more engagements per post than SDCCU's norms.

Experiential immersion

Live and in person coast to coast

- Concert events
- Sporting events
- Fundraising/charity events
- Remote broadcasts, grand openings, etc.

Digital and virtual integration:

- Esports partnerships
- Gaming platforms
- Virtual symposiums
- Virtual concert and entertainment

iHeartLand in the Roblox Platform

Allowing fans to interact with artists and creators while learning how to build their own music empire through competition and collaboration with the major names in music, podcasting and entertainment.



Performance **matters**

Radio Works

Methodology to fit any objective



ATTRIBUTION

- AnalyticOwl
- ArtsAI
- Claritas
- LeadsRX
- Media Monitors
- Nielsen
- Pound 250
- Provoke Insights
- Two-Tiered Attribution (Oxford Road)
- Validate
- Veritone
- Veritonic
- Vivvix



BRAND EFFECT

- ABX
- Coleman Insights Ascend
- Engagement Labs
- IPSOS
- IRI
- Kantar
- Maru
- Nielsen
- Provoke Insights
- Signal Hill
- Veritonic



TRANSPARENCY & ACCOUNTABILITY

- Eastlan
- Kantar
- MRI-Simmons
- Nielsen
- Triton Digital
- Validate
- Veritone



RETURN ON AD SPEND

- Analytic Partners
- Nielsen
- Vivvix
- Media Mix Modelers

Audio vs the rest **grocery**

Just how does audio compare to other leading media channels when matched up head-to-head for supermarket ad campaigns?

Radio supermarket ads drive 42% of consumers to try a brand – better than every compared media channel.

	Radio	TV	Online Radio	Podcasts	Internet ads	Online video ads
AWARENESS	48%	45%	42%	42%	35%	25%
CONSIDERATION	37%	37%	37%	36%	31%	21%
CONVERSION	42%	40%	39%	39%	32%	22%
LOYALTY	32%	32%	32%	29%	25%	18%

Percentage of Ad-Exposed Consumers Impacted by Advertising

Audio vs the rest **healthcare**

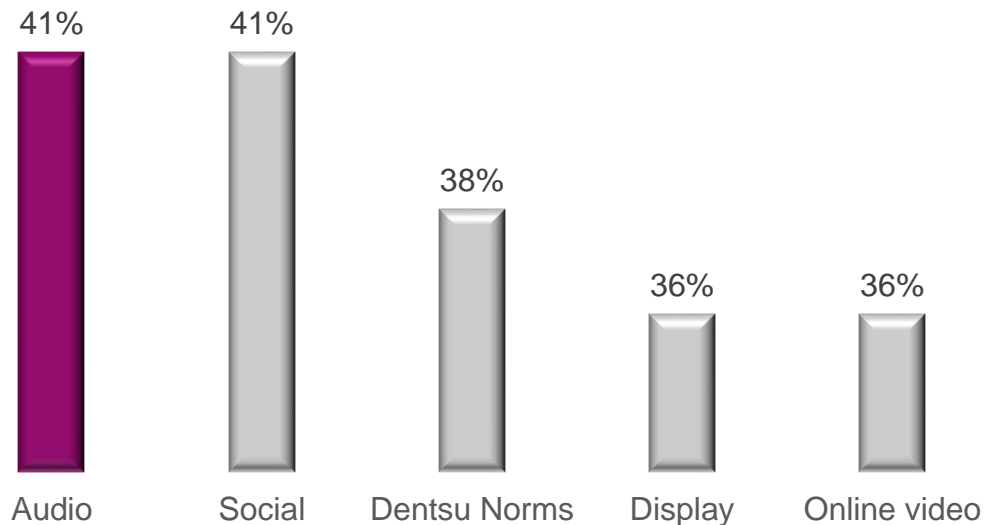
Just how does audio compare to other leading media channels when matched up head-to-head on hospital ad campaigns?

Digital audio ads drive 36% of potential patients to consider a hospital – 34% say the ads help them trust a brand!

	Radio	TV	Digital Audio (Streaming/ Podcasting)	Internet	Internet Search	Social Media	OTT/CTV incl. SVOD
AWARENESS	48%	44%	42%	37%	34%	32%	25%
CONSIDERATION	36%	35%	37%	31%	38%	28%	20%
CONVERSION	41%	39%	39%	34%	31%	31%	22%
TRUST	34%	32%	34%	26%	26%	27%	19%

Percentage of Ad-Exposed Consumers Impacted by Advertising

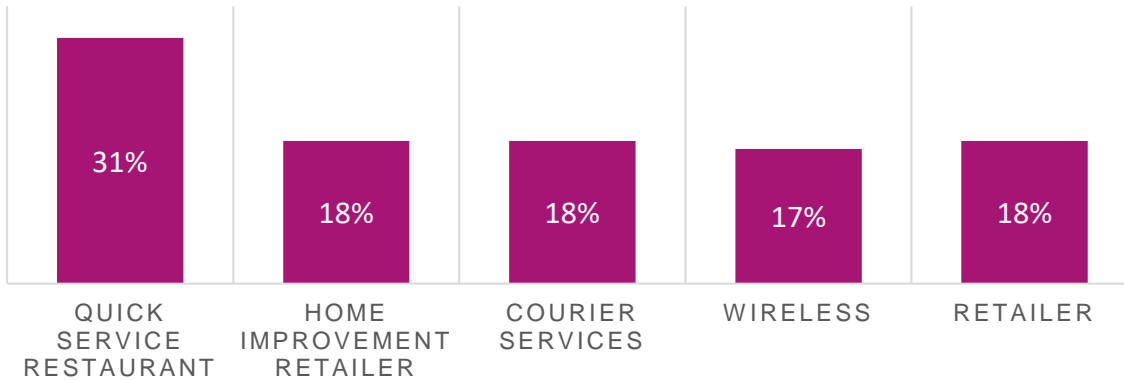
Audio commands attention **at the top of the funnel**



Audio generates +8% greater brand recall vs. Dentsu norms.

Radio is a multiplier

RADIO ADDS INCREMENTAL REACH



INCREMENTAL REACH GROWS AMONG YOUNGER AUDIENCES

Category	Incremental reach by age				
	P6+	P18-34	P18-49	P35-54	P55+
Quick service restaurant	+31%	+46%	+30%	+32%	+31%
Home improvement retailer*	+18%	+42%	+35%	+25%	+11%
Courier services	+18%	+39%	+33%	+24%	+9%
Wireless	+17%	+35%	+30%	+22%	+8%
Retailer	+18%	+41%	+37%	+30%	+10%

Quick service restaurant	+18%	+41%	+31%	+30%	+10%
Home improvement retailer*	+17%	+39%	+30%	+25%	+8%

Single digit shifts = **double digit results**



Auto marketers that increased audio spend 1.8% achieved a +23% ROAS.



Retail marketers that increased audio spend 1.1% achieved a +16% ROAS.



Financial services marketers that increased audio spend 1.2% achieved a +14% ROAS.

Shifting **1.2%** of spend to audio produced as much as a **23%** increase in audio return on ad spend (ROAS).

P&G leads with love

RADIO case study



Background

- P&G's Lead with Love is a comprehensive and sustaining citizenship engagement program to advance equality and inclusion, and to protect the environment.
- In 2021, P&G has committed to 2021 Acts of Good to grow the reach and impact of positive acts by real people in communities across the U.S. and consumers participate through the P&G Good Everyday loyalty program.
- P&G turned to RAB and Katz Radio Group to steer local radio to make an impact in 11 markets that have over-indexed in racial violence.

Objectives

- Drive awareness, broaden consumer perspective and impact consumer behavior for:
 - The elimination of racial bias (P&G's Widen the Screen initiative.)
 - Energy efficiency by washing with cold water (Tide's "Cold Call" campaign.)
 - Water conservation by running the dishwasher every night (Cascade's "I do it Every Night" campaign.)
 - Protecting America's forests ("Enjoy he go" with Charmin.)
- Evoke conversations surrounding equality and sustainability therefore contributing to 2021 Acts of Good.

Solution

Lead with Love

- 56 partner radio stations in 11 radio markets brought the Lead with Love campaign to life throughout the month of June 2021.
- Creative executions included :60, :30, :15 and :120 audio units that ran across over-the-air and streaming platforms.
- 53 local radio personalities served as brand ambassadors across radio platforms and social media to raise awareness and impact consumer behavior.
- Radio influencers produced over 800 unique :60 and :120 organic conversations around core initiative values.
 - 2-minute messages, equating to 2+ hours of conversation, about societal issues broadcasted on radio's local airwaves

Results

Campaign effectiveness measured by Advertising Benchmark Index (ABX) resulted in increases across the following metrics:

- Recall of P&G radio advertising (including Cascade, Charmin, and Tide).
- Recall of P&G key corporate messages, including: "2021 Acts of Good," "Widen the Screen," and "Good Everyday.
- Radio listeners' beliefs and behaviors gained momentum.
- The pre-recorded corporate and brand creative spots were highly effective compared to ABX norms.



Unprecedented Industry Collaboration

Traditional competitors joined forces for the greater good with flexible executions to reflect local radio station articulations and current local events.

Innovative Solutions

Never been done before tactics implemented cross-broadcasters.
– 2-minute advertising messages equating to 2+ hours of conversation broadcast on radio's airwaves across ownership groups, formats and markets.

Results

Increases across all brand and corporate KPIs
Recall and behavioral change among consumers gained momentum.

Radio **delivers**



Mass and targeted reach



Immersive experiences and influences with scale



Platform consistency



Addressability



ROI across categories and attributable results.



Trusted, accountable and safe environment.

THIS!
IS RADIO

RAB

rab.com