

# The State of Audio Adtech Report 2025



WHERE AUDIO ADVERTISING INNOVATION STANDS  
AND WHERE IT'S GOING





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# Audio advertising is a growing force

At home, in the car, at work, on the go, and every moment in between, digital audio seamlessly integrates into daily life. In a world inundated with content, audio has a unique ability to engage, connect, and evoke strong emotions. Whether through music or podcasts, people spend over four hours of their day listening—making up 31% of their total time spent with media.<sup>1</sup>

On the flip side, audio makes up only 9% of media budgets.<sup>1</sup> This gap reveals a huge opportunity for publishers to monetize their content and for advertisers to reach their audiences in the moments that matter most. And audio adtech advancements and innovation are strengthening campaigns and strategies to facilitate deeper, more meaningful connections than ever.

TIME SPENT



ADVERTISING SPEND



This report explores where the industry stands today, examines the innovations that are addressing key challenges, and provides insight into the developments ahead for 2025 and beyond.

## A QUICK INTRODUCTION

AdsWizz

Powers **60 billion** monthly dynamically inserted audio ad impressions.

### WHO WE ARE:

AdsWizz, the leader in audio advertising ad technology.

### WHAT WE DO:

Shape the future of audio adtech with our robust platform and suite of tools—enabling anyone and everyone in the audio business to thrive.



A large, stylized double quote icon in a vibrant purple color, positioned to the left of the main text block.

Audio isn't just another channel—it's the pulse of digital connection. Sound commands attention, creates lasting impressions, and fosters deep brand loyalty in a world saturated with visuals. With industry-leading technology, we empower publishers and advertisers to harness digital audio's unique power, transforming it into a key driver of their story.”

**ANNE FRISBIE**  
SVP, GLOBAL BUSINESS DEVELOPMENT, ADSWIZZ







THE RISE OF PROGRAMMATIC AUDIO

# An industry moving at the speed of sound





## THE RISE OF PROGRAMMATIC AUDIO

From targeting, to ad formats, to controls, programmatic audio is on the cutting edge—driving a massive increase in adoption. For advertisers, it delivers scalable, efficient campaigns delivered via real-time campaign automation with transparency, accountability, and accurate targeting. And for publishers, it enhances listening experiences while accelerating monetization opportunities.

Of course, we can't talk programmatic audio without mentioning the industry's darling: podcasts. The podcast boom revolutionized content consumption—built off the back of the incredibly impactful and fruitful host-read ad. While it's still early in the game, quick-to-market advancements in adtech are making it possible to see scale in host-reads thanks to dynamic ad insertion. And as video—and even social—continue to become synonymous with podcasts, we're now talking about a super scalable, streamlined, omnichannel solution.

These innovations bust the programmatic podcast door wide open. As publishers continue to shift away from direct models, build their audiences across different channels, and utilize programmatic to boost revenue opportunity, more premium, diverse supply is available for advertisers.

## What's driving the trend?

### MASSIVE REACH

# Over 75%

Americans 12+ are listening to digital audio.<sup>2</sup>



### SIGNIFICANT GROWTH

# \$2.6 Billion

in ad revenue projected for US market by 2026.<sup>3</sup>

### NEW FORMATS

# 135 Million

podcast listeners in America, growing 12% YoY.<sup>2</sup>

### PUBLISHERS UNLOCK

# Up to 25%

additional ad spend with dynamically inserted host-reads.<sup>4</sup>





# How to activate

Adswizz is playing a critical role in the meteoric rise of programmatic audio, powering two billion AdsWizz Marketplace impressions and four billion monthly impressions sold via third-party DSPs. And the trend is taking hold internationally. In France, a whopping 80% of impressions are sold via third-party DSPs. With the innovations below, this trend will continue to grow.<sup>5</sup>



## Dynamic ad insertion (DAI)

DAI delivers a smarter, more personalized way to connect with listeners—all while giving creators and advertisers full control. Ad insertion adapts based on your location, the time of day, or even the weather—delivering perfectly timed, tailored messages.



## Automated host-read ads

Blend the personal touch of host-read ads with the power of programmatic tools to target the right audience, track performance, and tweak strategies in real-time. It's a true win-win-win for publishers, podcasters, and advertisers.



## Dynamic creative optimization (DCO)

DCO automates the creation of tailored ad variations that adapt in real-time to different environments. Advertisers can personalize the creative experience and audio message using listener data such as location, daypart, first-party data, weather, and platform.





ENHANCED TARGETING CAPABILITIES

# Audience connection goes next level





## ENHANCED TARGETING CAPABILITIES

From streaming music to podcasts, listening experiences are more personal and customized for everyone involved (listeners, publishers, advertisers, et al). Advanced targeting taps into what really matters: consumer identifiers, listening habits, emotional resonance, and contextual relevance. The result is messages that consistently reach the right audience at the right time to make a meaningful impact with unmatched accuracy.

The rise of first-party data and contextual targeting is powering a new wave in audio advertising. Contextual targeting now accounts for 60% of targeting dimensions on AdsWizz's platform.<sup>6</sup> And 17% of the US streaming inventory is already ID-enriched, and it's only getting bigger as privacy-friendly ID solutions like UID2 and ID5 continue to grow.<sup>7</sup> That means ads aren't just timely—they're emotionally and situationally spot on.

Today's real-time tools are designed to make it easy. Ads that don't just grab attention but genuinely enhance the listening experience. It's about creating connections—real, valuable connections for audiences and advertisers alike.

## What's driving the trend?

AD RELEVANCE = RESONANCE

# 156% higher

emotional impact driven by culturally relevant ads.<sup>8</sup>



FOCUS ON PERSONALIZATION

# 50% growth

among brands adopting personalization, with budgets up 29% in 2024, compared to the previous year.<sup>9</sup>

GOING 1P

# 71% of brands

and agencies are increasing their first-party data sets, compared to historically heavy reliance on third-party audiences.<sup>10</sup>





# How to activate

Today’s audio tools are anything but basic. Platforms like AudioMatic DSP and AudioMax SSP have graduated from transactional to transformational, helping advertisers and publishers turn data into significant dialogue.

Psst...



Want to learn more about **targeting?**

Check out our latest eBook, Advanced Targeting in Digital Audio Advertising!

LEARN MORE



## Multicultural targeting

Multicultural audiences are embracing digital audio, bringing with them a projected \$7 trillion in spending power by 2025.<sup>11</sup> Custom targeting segments that combine music genre, content language, geographic data, and predictive behaviors come together to allow advertisers to build genuine connections in diverse communities.



## Weather targeting

Weather affects what we wear, how we feel, and even what we buy. Weather targeting taps into these moments, creating ads that are hyper-relevant and impossible to ignore. With live data updated every 60 minutes, our platform can serve up campaigns that are always timely and on-point.



## Location targeting

With real-time data connecting ads and audiences, the possibilities are endless: targeting big events, local fairs, or tailoring ads for different back-to-school dates. Location targeting enhances context, adding local flavor and relevance.



## Content mood targeting

Music and emotion go hand-in-hand, and with mood targeting,\* advertisers can tap into that powerful connection. This data-driven approach aligns ads with listeners’ mindsets, fostering positive associations and boosting brand recall.

\*Currently, this feature is available only on Pandora and SoundCloud (US).





SHIFTING DATA STRATEGIES

# Privacy becomes priority





## SHIFTING DATA STRATEGIES

Modern audiences are increasingly clamoring for personalized entertainment experiences. Paradoxically, they're also demanding more data privacy, and both private companies and legislative bodies are taking note. While 78% of Americans feel confident in their ability to protect their data, 61% are still skeptical about the effectiveness of these efforts.<sup>12</sup> This widespread mistrust poses a real challenge for advertisers, making the intersection of privacy, data management, and advanced targeting strategies crucial.

Brands and agencies are leaning on their opted-in first-party data—and only working with partners who can do the same and/or contribute to their data strategy. The rise of privacy-forward solutions is revolutionizing audio adtech and helping advertisers regain that lost trust. Scale is a key factor driving the industry's shift. With the increase in global user privacy opt-in/out frameworks, scale is being impacted as users opt out of traditional data signals like cookies and mobile advertising IDs (MAIDs). ID-less targeting and clean room solutions enable advertisers to reach their target audiences effectively while maintaining scale.

## What's driving the trend?

### DATA PRIVACY CONCERNS

# 61%

of Americans are skeptical about the effectiveness of data privacy efforts.<sup>12</sup>



### PERSONAL DATA RELUCTANCE

# 71%

of consumers would discontinue their relationship with a company that fails to handle their sensitive data responsibly.<sup>13</sup>

### BUILDING TRUST THROUGH PRIVACY

# 83%

of consumers cite data protection as one of the most essential factors in companies' ability to earn their trust.<sup>14</sup>

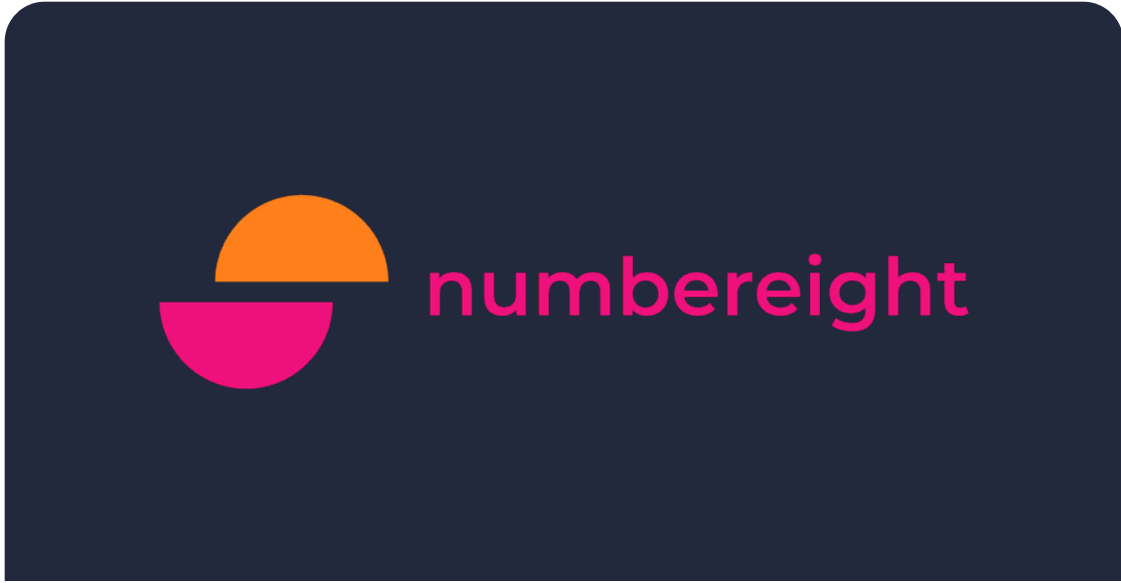






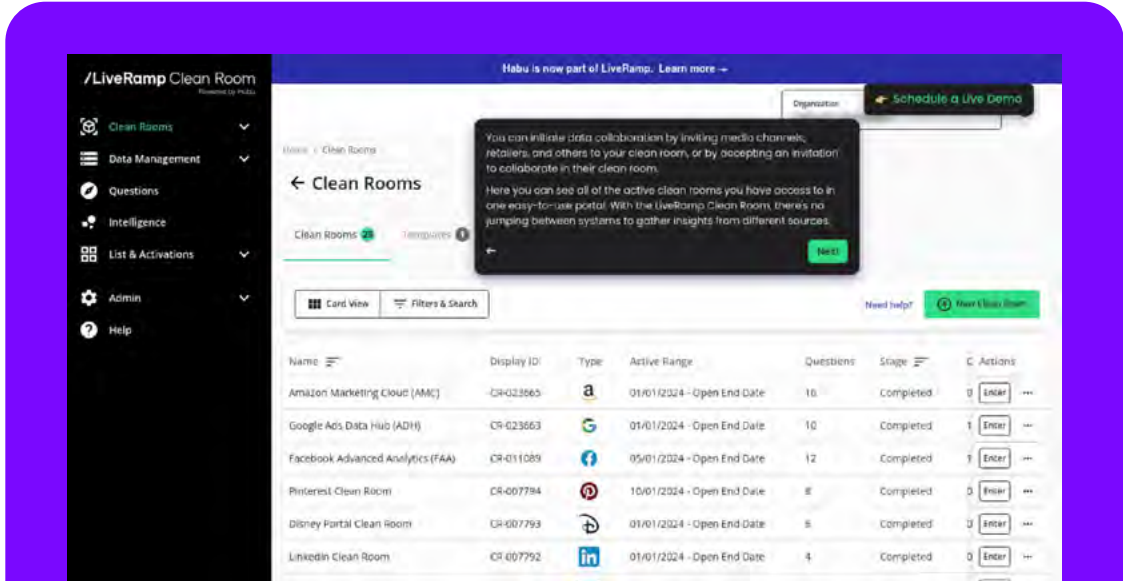
# How to activate

Advertisers and publishers can thrive by partnering with a privacy-focused audio adtech provider like AdsWizz. The following cutting-edge tools showcase how privacy and accuracy can coexist, enabling advertisers and publishers to deliver impactful results while preserving consumer trust.



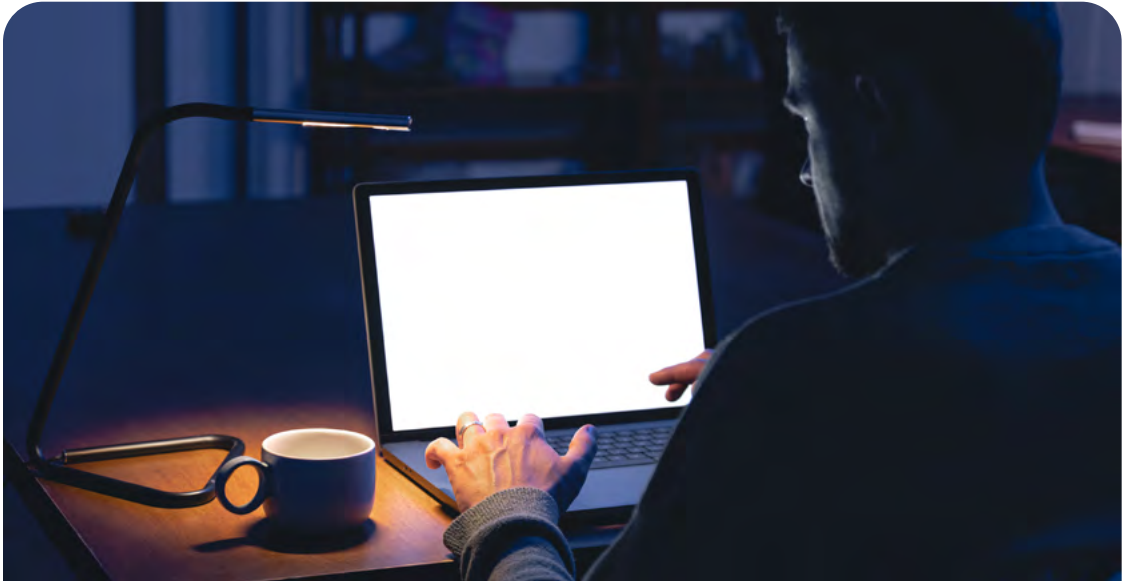
## Anonymized data

AdsWizz partners with behavioral intelligence company NumberEight to prioritize privacy by using anonymized data to predict demographic audiences, boosting engagement without compromising personal information.



## Clean rooms

Clean rooms seamlessly combine innovation with a steadfast commitment to privacy, offering advanced analytics that are more rigorous and privacy-safe to help advertisers unlock new opportunities. SiriusXM Media, our parent company, recently partnered with LiveRamp’s Clean Room, powered by Habu.



## ID solutions

As traditional identifiers decline across the industry, the AdsWizz platform integrates seamlessly with all third-party ID solutions—including NetID, ID5, RampID, UID2, and others—empowering publishers and buyers to transact effectively using their preferred identifiers.



## Predictive Audiences

Powered by our partnership with Comscore, Predictive Audiences is transforming podcast advertising. This solution offers advertisers access to over 300 finely tuned audience segments to strike the perfect balance between ethical engagement and impactful messaging.





GOING BEYOND BRAND SAFETY

# Growing controls = Growing confidence





GOING BEYOND BRAND SAFETY

Brand safety plays a critical role in protecting a brand’s value and reputation. In the past, playing it safe often meant avoiding certain genres or shows, unintentionally leaving valuable, engaged audiences untapped. Now, with 69% of audio publishers offering brand safety solutions, the terrain has changed.<sup>3</sup>

Brand safety is table stakes in digital audio; music and podcasts are generally considered brand-safe, positive environments. Brand suitability takes it a step further. Modern audio adtech goes beyond simple placement, ensuring that messages align with the right context, enhancing both safety and impact. These advanced controls enable advertisers to confidently broaden their reach, uphold their brand values, and build meaningful connections with their audiences.

When advertisers trust their tools and strategies, they can focus on crafting engaging, relevant messages without worrying about misaligned placements or wasted budgets.

What’s driving the trend?

TRUST & CREDIBILITY

55%

of consumers say ads near fake or incendiary content negatively impact their purchase decisions.<sup>15</sup>



ETHICAL ALIGNMENT

51%

of consumers would consider discontinuing a product or service if its ad appears next to unsuitable content.<sup>16</sup>

BRAND SAFETY FOCUS

Over 60%

of advertisers and agencies cite brand safety as a significant concern.<sup>17</sup>





# How to activate

Advanced audio adtech solutions provide unparalleled real-time transparency, empowering advertisers to track where their ads are running and assess performance information. As a result, advertisers and publishers can receive instant insight into campaign progress, while ensuring ads are placed in the right environment, reaching authentic and verified audiences.



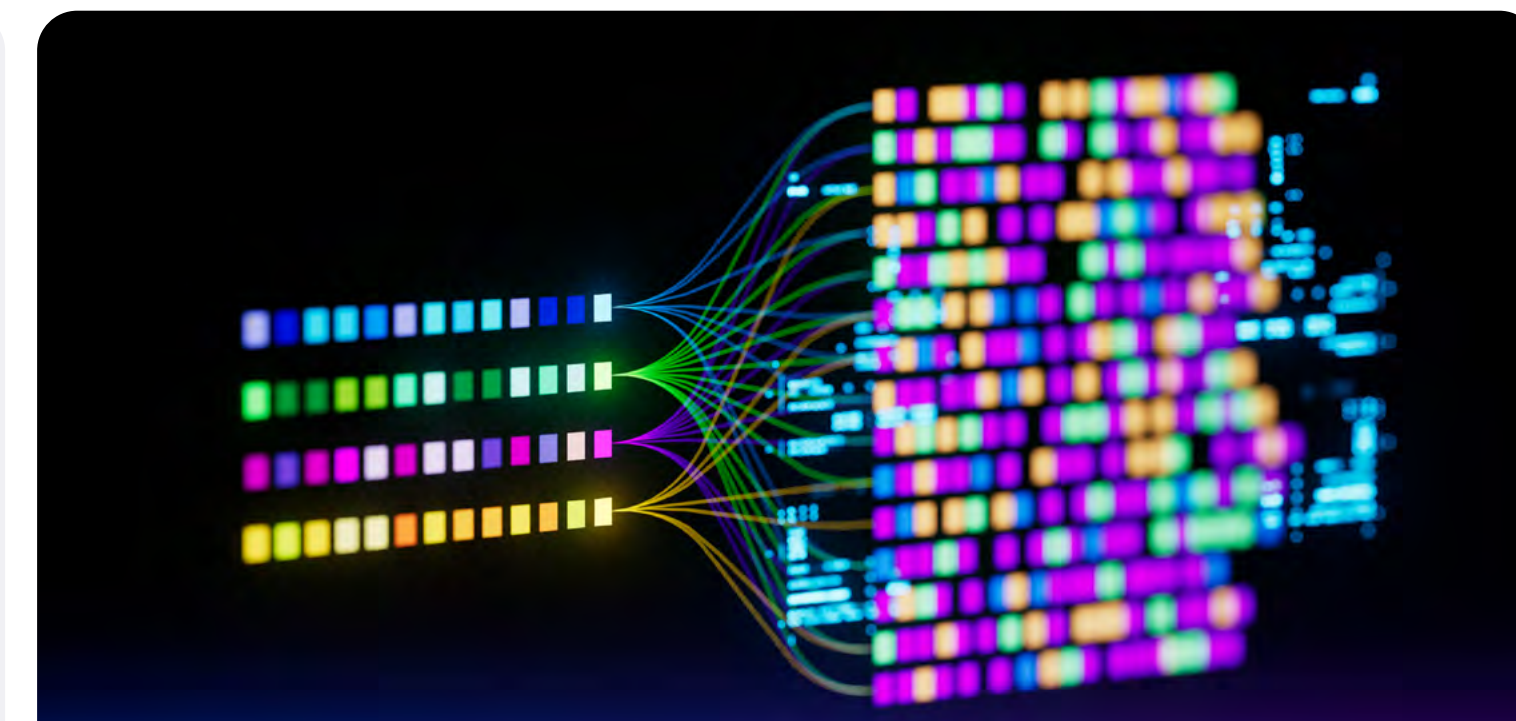
## Measurable brand suitability

Our partnerships with innovators like Barometer and ArtsAI allow brands to verify the contextual alignment of campaigns mid-flight. With instant insights, suitability reporting, and precise targeting, these advancements enhance effectiveness, protect brand reputation, and inspire confidence.



## Brand suitability by Comscore

Go beyond keyword blocking with a tool that acts as a personal curator and analyzes content contextually, ensuring ads align with a brand's values. By placing ads in the right environments, it minimizes risks and fosters trust in the ad-buying process.



## Invalid traffic (IVT) filtering

IVT filtering is an ad budget bodyguard. This technology eliminates bots and fraudulent domains before they can compromise a campaign. The result? Ads that reach verified, real audiences, protecting investment and strengthening trust in campaign authenticity.





We're redefining audio as a versatile and powerful pillar of digital engagement. It's no longer just about delivering ads—it's about reaching listeners wherever they are with personalized, contextually relevant, and privacy-first experiences. By adapting to audience environments and prioritizing brand safety, audio now fosters deeper, more authentic connections—turning every moment into an opportunity for meaningful impact.”

**FRANZ BERNSTEIN**

VP OF AD PRODUCT, SIRIUSXM MEDIA & ADSWIZZ





LISTENERS DEMAND MORE

# More channels, more formats, more opportunities





## LISTENERS DEMAND MORE

The lines between consumption and participation are blurring. As audiences demand content that is both interactive and emotionally resonant, omnichannel consumption is now the norm. Just look at podcasts; 31% of weekly podcast listeners use YouTube as their preferred listening platform.<sup>18</sup> These evolving behaviors create significant opportunities for publishers and advertisers to rethink how they engage with audiences.

Brands have more ways than ever to craft experiences that meet people where they are—through the intimacy of audio, the immediacy of video, or a combination of the two. Interactivity is reshaping the storytelling experience, enabling richer, more impactful connections. To fully leverage these changes, content creators and advertisers must embrace innovation and flexibility.

Adapting content for diverse platforms unlocks new monetization opportunities, from baked-in ads to dynamic ad placements, allowing publishers to cater to varied audience preferences while forming partnerships that amplify their reach. Meanwhile, advertisers can tap into engaging formats like dynamic video and interactive audio ads to deliver tailored experiences that drive higher engagement and lasting brand recall.

## What's driving the trend?



VIDEO IS IN DEMAND

84%

of Gen Z podcast listeners prefer podcasts with video component.<sup>19</sup>

MULTI-PLATFORM IS THE NORM

59%

of US podcast listeners use both audio and video platforms.<sup>20</sup>



VIDEO &amp; SOCIAL MEDIA INTEGRATION

45%

of listeners seek additional content from podcast hosts on YouTube and social media platforms.<sup>21</sup>







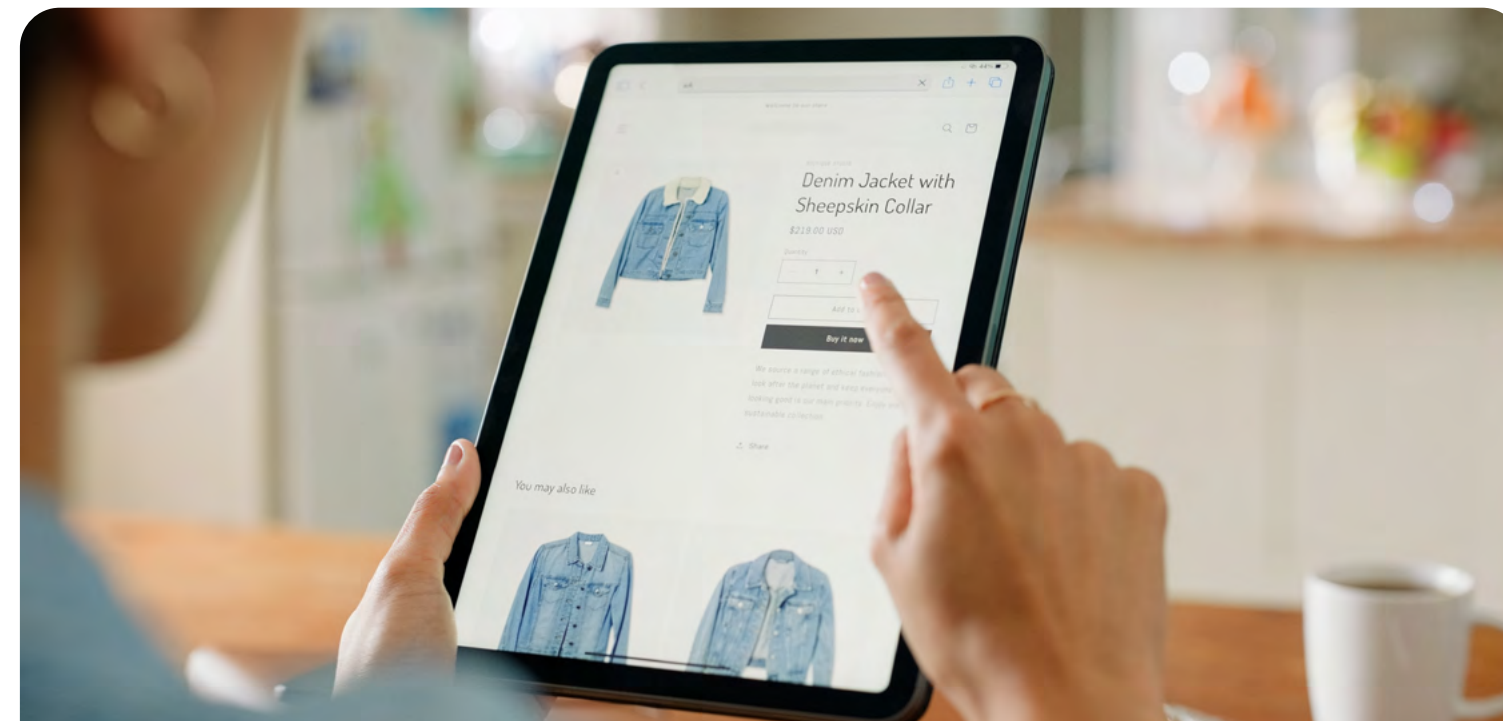
# How to activate

To seize these opportunities and respond to shifting audience behaviors, brands and advertisers can implement strategies that integrate with omnichannel consumption patterns. Innovative tools enable personalized, immersive campaigns that reverberate sincerely with modern consumers, fostering engagement and driving measurable results.



## Second screen retargeting

Second screen retargeting pairs audio ads with display banners across web and app platforms. Within two days of hearing an ad, listeners are retargeted using precise device IDs or IP addresses.



## AudioPixel

AudioPixel transforms interactions into measurable outcomes like website visits and purchases, all while prioritizing user privacy with anonymized data. This solution delivers insights into geographic, demographic, and behavioral trends. By linking ad exposure to tangible actions, advertisers can build meaningful connections through ethical data practices.



## Voice-activated ads

Voice-activated ads allow for real-time, two-way interactions, inspiring users to engage through simple voice commands. Whether visiting a website, redeeming an offer, or exploring a product, these ads deliver personalized experiences that feel natural and effortless. Designed for voice-first platforms, they adapt to multiple languages and response times, ensuring campaigns connect with audiences anywhere.



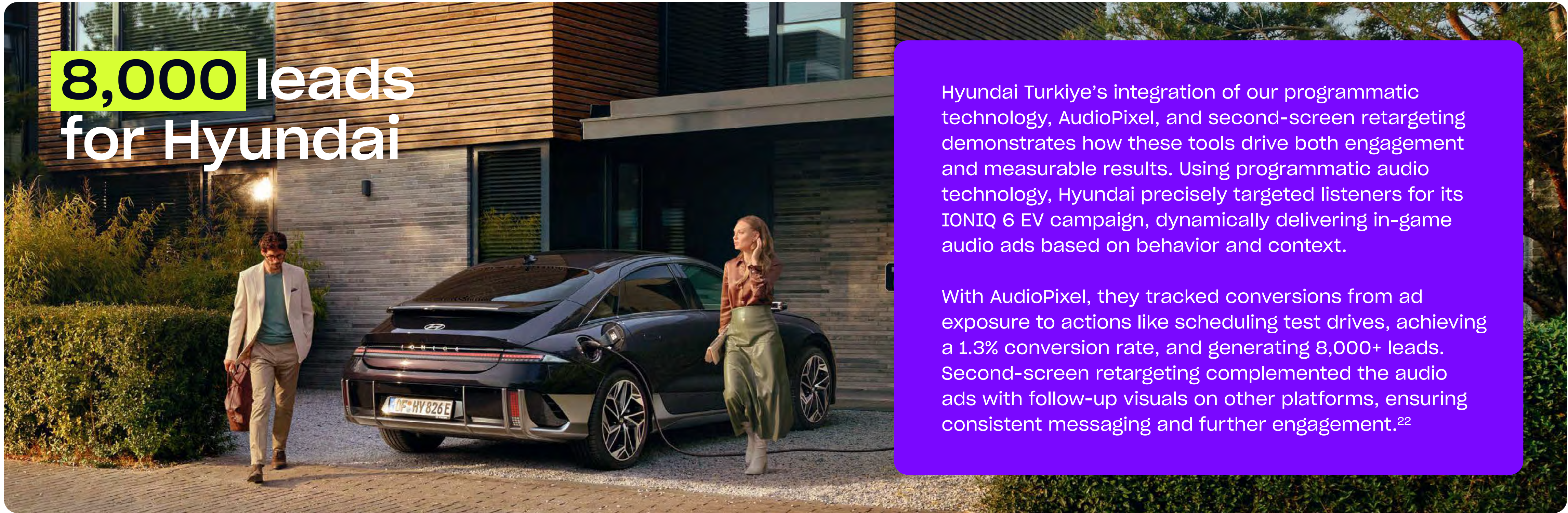


# Spotlight: A campaign that made waves

AdExchanger Award nominee for  
Innovation in Audio Advertising

Creativity, precision, and impact set groundbreaking campaigns apart. When advertisers embrace emerging trends and harness cutting-edge technology, the result is immersive, intimate experiences that resonate with audiences long after the message is delivered.

Here’s how one brand leveraged a range of audio adtech innovations to create a campaign that combined creativity with measurable results.



**8,000** leads  
for Hyundai

Hyundai Türkiye’s integration of our programmatic technology, AudioPixel, and second-screen retargeting demonstrates how these tools drive both engagement and measurable results. Using programmatic audio technology, Hyundai precisely targeted listeners for its IONIQ 6 EV campaign, dynamically delivering in-game audio ads based on behavior and context.

With AudioPixel, they tracked conversions from ad exposure to actions like scheduling test drives, achieving a 1.3% conversion rate, and generating 8,000+ leads. Second-screen retargeting complemented the audio ads with follow-up visuals on other platforms, ensuring consistent messaging and further engagement.<sup>22</sup>





PREDICTIONS

# What's next in 2025 and beyond





## Automation will drive faster, smarter campaigns

Automation will empower advertisers and publishers to nimbly adapt to listener behavior with unmatched speed. Advanced AI capabilities will be a major driver of this change, allowing real-time decision-making to deliver hyper-personalized ads with precision.

Capabilities, such as our Synthetic Voice Ads, will continue to break down barriers so that it's easier and more cost effective to run an audio advertising campaign. Streamlined workflows will simplify targeting, optimization, and reporting, bridging analytics gaps and unifying measurement tools.

## Programmatic podcasts explode

As podcast engagement continues to surge, programmatic podcast buying is set for remarkable growth. This evolution is driven by advancements in audio advertising technology and a growing understanding of programmatic solutions among advertisers.

In 2024, SiriusXM Media reported a 33.5% year-over-year increase in podcast programmatic revenue in the US, with 25% of the company's total US digital audio spend transacted programmatically.<sup>4</sup> As advertisers increasingly recognize the efficiency and scalability of programmatic podcast buying, its adoption is expected to accelerate. Key drivers include automation capabilities that simplify targeting, allow real-time delivery, and provide tools that improve audience engagement.

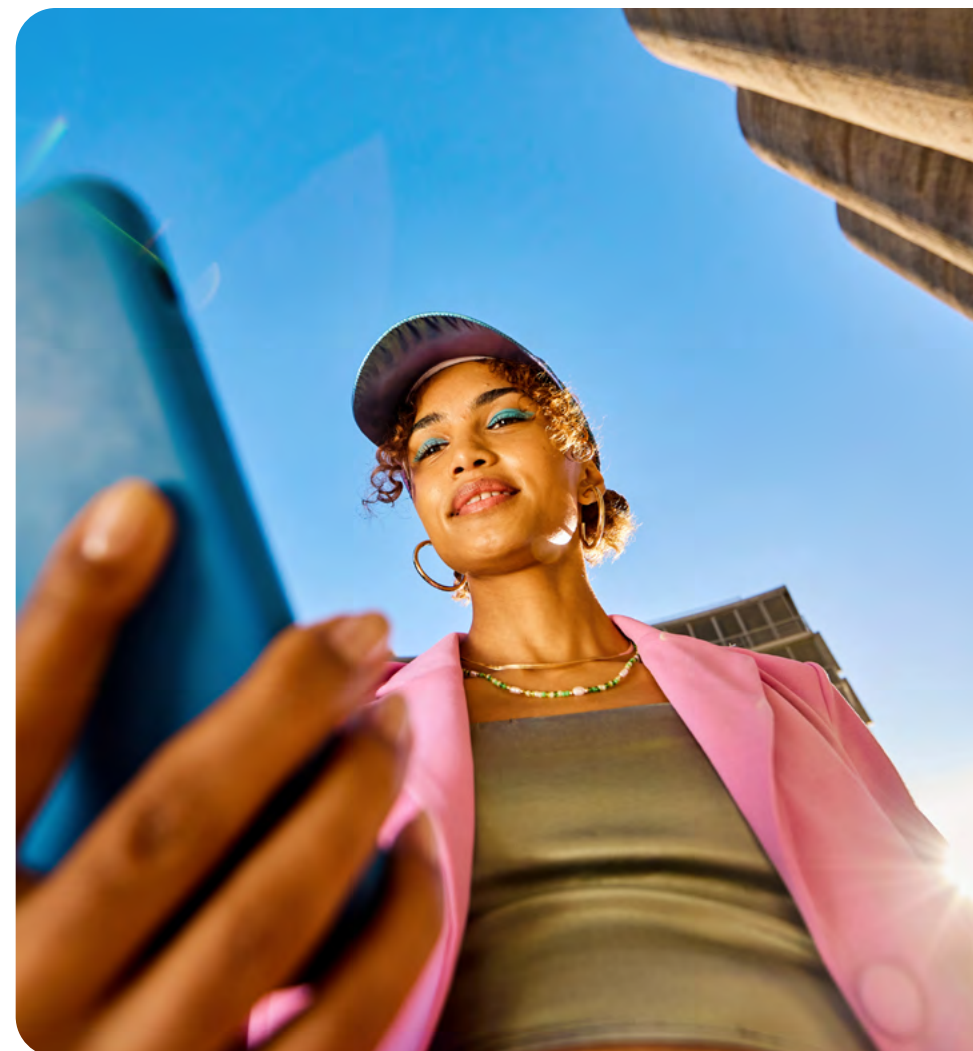


## Audio transcends audio

Audiences are connecting with musicians and creators, songs and shows, and media is just the delivery mechanism. As consumers engage with content across multiple platforms, multi-media buying will become a cornerstone strategy for podcast advertising in 2025 and beyond.

Podcasts are uniquely positioned within the omnichannel ecosystem, offering unmatched intimacy and engagement that strengthen audience connections while complementing video and social media formats. This interconnected consumption demands a unified approach to campaign planning, where messages integrate fluidly across platforms to meet platform- and media-agnostic consumers wherever they are.





## Open ecosystems will win over walled gardens

Content creators want to be where listeners are—and that's everywhere. Walled gardens, which may offer value now due to controlled, measurable environments, will begin to lose that value as listeners break down those walls and as we continue to see innovations in identity, targeting, and measurability across multiple players.

In 2025 we will see strategies shift to be platform-agnostic, empowering advertisers and publishers to deliver broader audience reach and establish a foundation for sustainable growth in the increasingly interconnected digital landscape.



## Identity crisis no more

Publisher-advertiser alliances will drive advancements in identity solutions, reshaping the digital advertising ecosystem to provide seamless audience targeting, enhanced measurement, and privacy compliance. These partnerships will unlock untapped inventory, enabling publishers to monetize more effectively and advertisers to achieve greater targeting precision.

Identity solutions such as UID2 and ID5 will bridge the gap left by declining third-party identifiers, leading to an increase in eCPMs and a lift in bid rates. By embracing these innovations, publishers and advertisers will drive greater campaign effectiveness, unlock new revenue opportunities, and build trust with audiences.

## All signs point to contextual targeting

Contextual targeting will be the cornerstone of digital advertising strategies worldwide, driven by its ability to provide relevant and privacy-first solutions. Currently, 60% of all global targeting dimensions on AdsWizz platforms are contextual.<sup>6</sup> This rapid adoption reflects advertisers' shift from third-party identifiers to more sustainable strategies.

By leveraging real-time data about brand safety, content attributes, and listener mood, advertisers will create campaigns that resonate profoundly with audiences. As capabilities expand, innovations like DCO and advanced contextual analysis will unlock new revenue opportunities, improve campaign efficiency, and build trust in the increasingly privacy-conscious digital terrain.



A large, stylized, light blue double quote icon consisting of two thick, curved lines.

Think of a brand message not as a monologue but a conversation—one that matches the rhythm and mood of a listener's life; one that matches what they're feeling or experiencing in that very moment. The future of advertising isn't about shouting louder; it's about whispering smarter, creating messages that resonate in real-time.”

**MOLLY PONZO**  
VP OF AD PRODUCT, SIRIUSXM MEDIA & ADSWIZZ





BETTER TECH, BETTER CAMPAIGNS

# AdsWizz is your premier partner

**Audio advertising creates powerful, one-on-one connections with listeners, fostering deep relationships that other media can't achieve.** In a world where consumer preferences are rapidly evolving, audio stands out as a dynamic and engaging platform. For both publishers and advertisers, this is the moment to seize new opportunities and gain a competitive edge in the growing audio market.

By choosing AdsWizz, you gain access to forward-thinking expertise and a comprehensive, end-to-end technology stack that provides flexible solutions across the entire digital audio ecosystem.

With AdsWizz, you'll unlock cutting-edge adtech solutions that captivate audiences, prioritize privacy, and protect brands. Together, let's create transformative audio experiences that resonate with listeners and deliver lasting impact.

**Let us help you elevate your campaigns to the next level.**

**CONNECT WITH US TODAY!**

## Prioritize privacy and build trust

We champion privacy-focused solutions, enabling advertisers and publishers to thrive in a regulatory-conscious environment. Solutions such as anonymized data, data clean rooms, ID solutions, and Predictive Audiences allow advertisers to maintain precise targeting capabilities while ensuring user data remains protected. For publishers, these tools foster transparency and build listener confidence by balancing personalization with ethical data practices.

## Embrace personalization with accuracy

Personalization drives relevance and connection, and AdsWizz provides the tools to make it seamless. Advertisers can create emotionally resonant campaigns using contextual targeting, multicultural segments, and mood targeting to align messaging with listener contexts and emotions. Publishers benefit by delivering personalized ads that naturally integrate with content, enhancing engagement and maintaining listener loyalty.

## Optimize performance with advanced tools

We equip partners with advanced tools to achieve exceptional results. Advertisers can leverage AudioMatic DSP for real-time campaign adjustments and AudioPixel for actionable insights that connect exposure to outcomes like website visits or purchases. Publishers can benefit from streamlined inventory management and precise delivery through AdsWizz's ad insertion suite and market operator console, surpassing industry standards for inventory optimization and campaign performance.

## Stay ahead of the curve in audio adtech

We empower advertisers with AI-driven personalization, programmatic advancements, and predictive modeling, enabling campaigns to adapt dynamically to market shifts. Publishers gain access to scalable, next-generation advancements such as the global AdsWizz Marketplace, ensuring sustainable growth and enhanced monetization. By embracing these innovations, advertisers and publishers alike can stay at the forefront of the audio advertising industry.





# About AdsWizz

AdsWizz (a SiriusXM company) is an audio-first adtech platform free from omnichannel imprecision and walled content gardens. Since 2008, AdsWizz has set the bar for multi-format planning, buying, and ad placement, designing advanced solutions to deepen the listening experience. We partner with enterprise publishers and advertisers to perfect the tools they need to execute stellar campaigns through the power of sound.



Nomination October 2024  
Innovation in Audio Advertising



Winner October 2023  
Innovation in Audio Advertising



Winner October 2022  
Best Use Of Technology By A Publisher



Winner October 2022  
Innovation In Audio Advertising



Winner January 2021  
Most Innovative Technology Platform



Nomination August 2022  
Best Audio Network



Nomination November 2022  
Best Use Of Audio





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