Recommendations for Marketers in a Screenless World

November 2019

Acknowledgments

This publication would not have been possible without the guidance and direction of the IAB Audio Committee and the time, dedication and contribution of the Recommendations for Marketers in a Screenless World working group members and companies listed below. We extend our thanks and deepest appreciation.

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About Us

The Interactive Advertising Bureau (IAB) empowers the media and marketing industries to thrive in the digital economy. Its membership is comprised of more than 650 leading media companies, brands, and the technology firms responsible for selling, delivering, and optimizing digital ad marketing campaigns. The trade group fields critical research on interactive advertising, while also educating brands, agencies, and the wider business community on the importance of digital marketing. In affiliation with the IAB Tech Lab, IAB develops technical standards and solutions. IAB is committed to professional development and elevating the knowledge, skills, expertise, and diversity of the workforce across the industry. Through the work of its public policy office in Washington, D.C., the trade association advocates for its members and promotes the value of the interactive advertising industry to legislators and policymakers. Founded in 1996, IAB is headquartered in New York City.

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Introduction

Screenless devices are seeing exponential growth across households throughout the U.S. This growth not only disrupts how brands approach their typical marketing plans but provokes them to take action in order to capitalize on the emerging market. Brands who don't educate themselves on the screenless device marketplace could be significantly missing out on reaching new and untapped audiences and/or risk losing relevance in an ever-growing cluttered space of brands and advertisements.

Such a new and rapidly growing ecosystem allows for brands to find unique and creative ways to reach the expanding screenless audience. Brand messages that prioritize audio will become as effective as visual ones, if not potentially more. This represents a prime opportunity for marketers to confidently reach a new segment of consumers with the deep engagement and intrinsic brand safety that audio offers.

For marketers to make the most effective investments, it is essential to understand what these emerging devices are, how they are used and what their benefits are across the consumer experience, activating campaigns, creative formats, and measurement criteria.

The Power of Audio

To fully grasp the benefits of audio, it's first necessary to understand the human truths behind sound.

According to the Saudi Journal of Sports Medicine, humans process sound faster than any other sense. We react more quickly and strongly to the things we hear than the things we see; i.e., an auditory stimulus only takes 8-10 ms to reach the brain, but a visual stimulus takes 20-40 ms. Capturing attention visually has been the core approach of the modern advertising industry for years, however, the opportunity to seize consumers' attention with sound alone remains a massive opportunity for brands given how the brain processes sound.

Further, audio is an emotive modality: sound influences emotion. This is why music is a central cultural marker. It's also why a speech can inspire millions to action. The ability for brands, therefore, to lean into audio as a method to tell meaningful, personal stories stands as a primary benefit of this channel. While the industry has long prioritized visual components of branding and advertising, Mindshare's NeuroLab recently found that audio is preferred neurologically over visual-only ads. Brands can harness this finding by prioritizing sound and other multimodalities with sound at the center of campaigns to meaningfully connect with consumers.

Increased access points for brands represent another significant benefit of audio. Nearly every piece of consumer hardware is now voice-enabled, and we are seeing a direct correlation between consumer behavior shifting more towards listening and voice-enabled device proliferation. With half of Americans owning a smart speaker today, and largely because of them, we are listening to more audio, more podcasts and more news across the board. Time spent listening to audio is also eating away at time spent with television and video as the chart on the following page shows. In fact, 26% of consumers who have purchased a smart speaker did so with the intention of reducing screen time. Among consumers with children under 5 years old, that share rises to 43%.

Average Time Spent with Media in the US, 2017-2021

hrs:mins per day among population

	2017	2018	2019	2020	2021
Digital	**6:03**	**6:21**	**6:35**	**6:45**	**6:55**
—Mobile (nonvoice)	**3:25**	**3:35**	**3:43**	**3:49**	**3:54**
——Audio	1:00	1:08	1:13	1:17	1:20
——Social networks	0:42	0:46	0:49	0:51	0:53
——Video*	0:34	0:37	0:40	0:42	0:44
——Other	1:08	1:04	1:02	0:59	0:57
—Desktop/laptop**	**2:02**	**2:00**	**1:58**	**1:57**	**1:56**
——Video*	0:24	0:24	0:24	0:23	0:23
——Audio	0:07	0:07	0:07	0:07	0:07
——Social networks	0:09	0:05	0:03	0:02	0:02
——Other	1:23	1:24	1:24	1:25	1:24
—Other connected devices	**0:36**	**0:47**	**0:53**	**0:59**	**1:04**
TV***	**3:56**	**3:44**	**3:35**	**3:29**	**3:22**
Radio***	**1:25**	**1:22**	**1:20**	**1:19**	**1:19**
Print***	**0:23**	**0:21**	**0:20**	**0:20**	**0:19**
—Newspapers	0:13	0:12	0:11	0:11	0:10
—Magazines	0:10	0:09	0:09	0:09	0:09
Other	**0:20**	**0:20**	**0:19**	**0:19**	**0:19**
Total	**12:07**	**12:08**	**12:09**	**12:13**	**12:13**

*Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking on desktop/laptop while watching TV is counted as 1 hour for TV and 1 hour for desktop/laptop; *excludes time spent with video via social networks; **includes all internet activities on desktop and laptop computers; ***excludes digital*

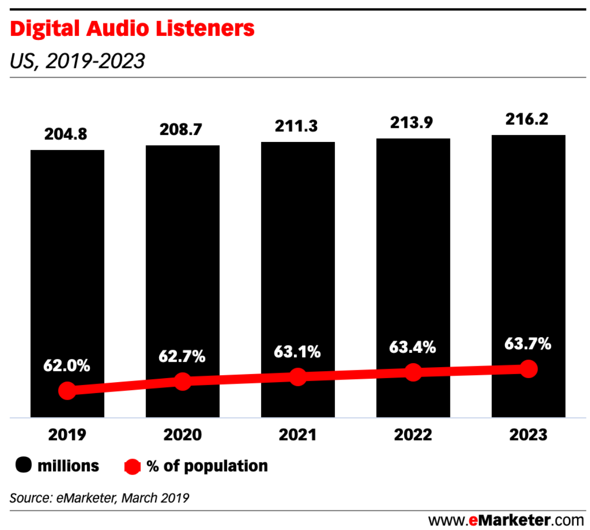
Source: eMarketer, April 2019

T10142 www.eMarketer.com

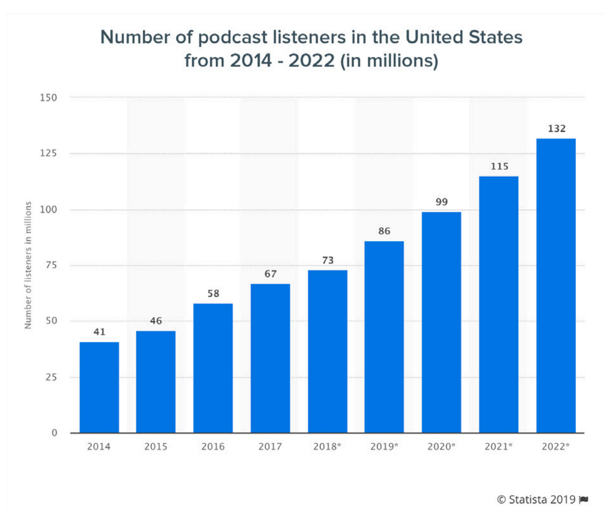
This device proliferation and time spent share shift begs the question of how (and if) brands are adjusting their communications and channel planning. With smart speakers as one of the fastest adopted consumer technologies in history, and connected cars, audiobooks, connected TVs, smartwatches and gaming consoles increasingly used to access digital audio, brand opportunities in audio have never been more plentiful.

Growth Drivers in Emerging Audio Platforms

There are nearly 205 million digital audio listeners in the U.S., an audience that's expected to reach over 216 million by 2023. Edison Research's Infinite Dial 2019 study adds that "time spent listening to online audio has reached a record high this year, with weekly online audio listeners reporting an average of nearly 17 hours of listening in the last week."



Podcast listening has hit a watershed moment as well. Over half of Americans now report having ever listened to podcasts. "In fact, as of 2019, there were an estimated 86 million podcast listeners in the U.S., a number which is forecast to grow to around 132 million by 2022." And, they have a lot of options. There is an average of 575 new podcasts started every day, and close to a million podcasts worldwide.



It should come as no surprise that, as consumer appetite for audio content increases, increased investment follows. Google, Spotify, iHeartMedia, Pandora, Amazon and Triton Digital have all made significant investments in audio, and podcasting particularly, this past year. Their entry into the space will only facilitate accelerated listener growth.

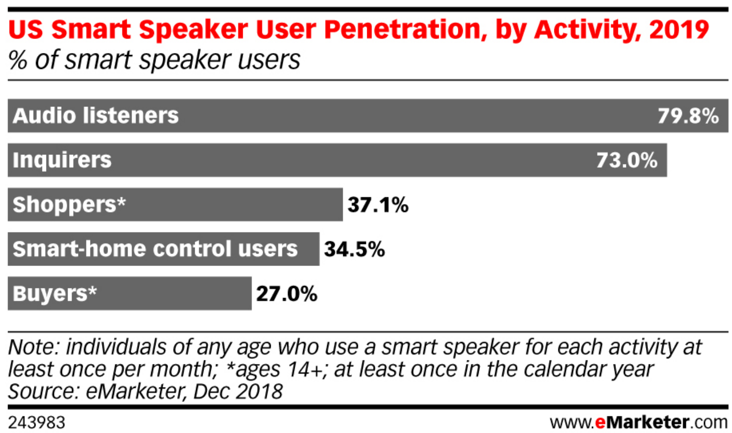
New technologies are also accelerating listener growth by reducing friction in audio consumption. Smart speakers and connected cars are the most well-known new device categories, but consumers are also accessing digital audio on Connected TVs, OTT devices, gaming consoles and smartwatches as manufacturers increasingly equip those devices with audio streaming apps.

New listeners, new devices, and increased engagement add up to an abundance of opportunities for marketers in a screenless world.

Device Categories and User Experience

Smart Speakers

One in four Americans use a smart speaker, which is the result of 2,500% growth in device usage since 2018. Moreover, the vast majority of those users say they listen to audio more than any other activity.



While smart speakers equipped with video screens are coming into the market, it's still a largely screenless environment. 69% of smart speaker owners exclusively have screenless versions. More importantly, more than half of U.S. households with a smart speaker own more than one. Owners report heavy use of the devices, as well, with 69% of owners saying they use it daily. That share climbs to 75% for households with children.

People primarily turn to their smart speaker for entertainment and information, with the top requests being play music and check the weather. Shopping is also emerging as a growing activity for smart speakers both in initiating product searches all the way through to actual purchase.

This largely screenless experience presents both opportunities and challenges for marketers. Smart speaker owners are open to using skills or apps from brands, and on-platform targeted advertising is becoming more prevalent in Flash Briefings or music services.

But, the experience is easily controlled by consumers, so marketers should be informative and additive, fit the tone of the content, and not be interruptive to the listener.

In-Car Dashboards

In the 20 years since GM introduced high-end safety features through Cadillacs connected to OnStar, the automotive industry has more expansively integrated car connectivity. 19% of Americans now own cars with in-dash entertainment systems. By 2023, that market penetration is expected to reach 73.6% as all new cars entering the market are now connected.

For audio, this connectivity expands user choices beyond terrestrial AM/FM radio, cassettes and CDs to satellite radio and digital streaming services. A WLAN connection from car to WiFi yields this expansion of choices whereby the car software or operating system can access or send data, download software and updates, communicate with other connected devices and provide internet connectivity for onboard passengers.

Marketers should plan for both mobile-powered Bluetooth audio integrations and interactive in-car dashboard audio experiences; e.g., aftermarket voice assistant integrations, the recently publicly available Amazon Echo Auto. In the former, mobile operating systems (dominated today by Apple and Android in the U.S.) dictate the user experience with audio. In the latter, consumer choices will continue to expand, much like with streaming video, until a saturation point occurs. Watch usage trends for audio partners who span across automakers, and for custom integrations between audio publisher and specific automotive brands to discern where to invest to reach target audiences.

Smart TVs

The primary entertainment source in most homes is the television and connectivity is increasingly becoming a key feature. Over 1/3 of Americans own a Smart TV today with over 80% of them connecting it to the internet.

By definition, a TV is a screened device, but when paired with voice control or integrated voice assistants, the function of the voice assistant can be separated from the imagery on the screen. This audio side channel can offer audio-only marketing opportunities, such as promoting installable apps or games, trailers or even tune-in for shows on-demand.

And, while there has always been a sizable amount of listening to the music-only channels that most cable services offer - roughly 4% of the time spent listening to audio is to those channels - newer Smart TVs that have app stores can also feature audio-centric apps. All the major music services have apps available for most Smart TVs, as well as many podcast and radio networks.

Connected Devices/IoT

One interesting aspect to the rise of voice assistants is the ease of integrating them into other in-home devices. Thermostats, refrigerators, ovens, coffee makers, light switches and even sprinkler systems have integrated voice assistants. Some of these have screens, but most are screenless.

While the basic function allows voice control of these devices, when a voice assistant is integrated, users often have access to the broad range of services including music playback, skills or apps, or access to general information provided from the web. All of these offer opportunities for brands, and as the user base grows, could offer interesting targeting options in more locations and moments in the home; i.e., food brands in the kitchen, beauty brands in the bathroom.

Gaming Consoles

The three most common gaming platforms, Xbox, PlayStation and Nintendo, all provide music streaming while playing. The targeting opportunities available during gaming are valuable to marketers who are trying to this broad and diverse advertising target.

Gamers tend to have longer TSL (Time Spent Listening) than average digital audio listeners. Frequency capping is an important tactic so not to oversaturate the gaming listener's experience. Gaming ad formats usually do not include clickable banners but do provide various other types of formats and game integrations. Most publishers will allow targeting by platform, though.

Desktop/Laptop Computers

Desktop and laptop audio experiences pioneered digital streaming audio, paving the way for portable players, phones and the rise of connected devices. Audio listening on desktop/laptop reached 146.9 million in 2019, which is 44.5% of the U.S. population, or 71% of all digital audio listeners. With early proliferation in the medium, desktop listening has plateaued and will start to slow as more audio-powered devices gain adoption.

All types of audio are provided through the desktop, including the companionship of group listening of live radio, podcasts, curated playlists powered by artists, genres or tracks, and choice-based, on-demand selections of owned audio files or streamed through paid services. These formats, delivered through the device's internal speakers, headsets, or out to external sound systems, turn the computer into "mission control" when a user is on the machine itself: just like a mobile device serves as a remote control on the go.

Desktop and laptop audio provide similar audience targeting as other digital platforms and multiple inventory sources including video, audio, and display content. The user may or may not be looking at the screen while multitasking, so audio ads are essential to earning attention and engagement.

Mobile Devices

Mobile is no longer just about how people interact with their touchscreens. Users now interact with their mobile devices using voice- and location-based services. Whether it's SIRI, Google Assist, Bixby, Alexa, or others, voice assist on smartphones removes the friction of typing and navigating. Moreover, with AirPods and wireless headphones increasingly enabled with voice assist capabilities, the ease with which consumers can stay audio- and voice-connected becomes even greater. For users on the go, mobile devices provide easy access to voice commands for texts, search, content activation, and even purchase.

As attention becomes harder and harder to garner, marketers are looking to drive business results in these mobile screenless moments; i.e., contextual relevance using data signals from mobile devices to drive clickable or trackable behaviors that are measurable and lead further down the purchase funnel.

Mobile devices will continue to be a primary access point for audio consumption. Technology will drive the user experience creating longer engagement times and deeper user experiences. Usage times for mobile audio are already rising based on the ever-increasing mobile podcast audience across the U.S.

Moreover, as more consumers wear smartwatches, opportunities will arise to target consumers while listening to audio on headphones connected to them. These growth opportunities mostly present in audio. New opportunities will become sought after once scale has been achieved.

EVALUATION CRITERIA FOR MARKETERS

SCREENLESS DEVICES

	Smart Speaker	In-Car Dashboard	Smart TV	Connected Device/ IoT	Gaming Console	Desktop/ Laptop	Mobile Device
Visual			✓		✓	✓	✓
Clickable						✓	✓
Trackable	✓	✓				✓	✓
Measurement (Performance)	✓					✓	✓
Measurement (Audience)	✓	✓	✓		✓	✓	✓
Automated Purchase	✓	✓		✓		✓	✓
Listening Experience (Singular)		✓	✓	✓	✓	✓	✓
Listening Experience (Group/Public)	✓	✓	✓	✓	✓	✓	
Context & Location	✓	✓				✓	✓
Formats/ Opportunities to Play (Streaming/Podcasts/ Apps/Addressable)	✓	✓	✓	✓	✓	✓	✓
Creative Type (Host-read Ad)	✓	✓	✓	✓	✓	✓	✓
Creative Type (Announcer-read Ad)	✓	✓	✓	✓	✓	✓	✓
Creative Type (Produced Ad)	✓	✓	✓	✓	✓	✓	✓
Creative Type (Long-form)	✓	✓	✓	✓			✓
Creative Type (Short-form)		✓	✓	✓	✓	✓	✓

Creative Considerations

The rapid adoption of connected devices has reached a critical scale, so marketers need to activate audio within these increasingly important touchpoints. The good news is that nearly 40% of consumers agree that ads on smart speakers are less intrusive and more engaging than in other places.

Audio creative requires brands to consider that listeners can be anywhere anytime when they opt-in to listen and in various states of mind; e.g., listening to a podcast while resting at home, or the news on a smart speaker while cleaning. They could have headphones plugged in while walking in the morning sun, or streaming music while driving in their car.

So, how can marketers prepare to capitalize on these increasingly screenless environments?

Develop an Audio-First Creative Perspective

A world where consumer touchpoints are increasingly screenless is rapidly approaching, and it is imperative for brands to represent themselves without visuals. This requires a shift toward audio-first creative, or at least equal amounts audio and visual. In the same way brands have spent the last century creating recognition with visual branding, the immediate point of access for marketers is to be creating the same recognition sonically.

Sonic branding isn't new: there are numerous brands who have very well-known sonic logos; e.g., NBC, McDonald's, Intel to name a few. Sonic branding is leveraged to reinforce their overall brand identity. Brands that have previously relied heavily on visual identity are now starting to rethink the sound of their brand; e.g., Mastercard's new sonic ID helps consumers recognize their brand when they make purchases with their credit card or hear their ads.

Applying sonic branding in the same way brands have done for visuals over the last century means having consistency where audibility has a role in consumer interactions, including commerce, content, retail stores, and more. Having a sonic identity will help your brand be top-of-mind in both audio-first environments or touchpoints where sound has an impact on the consumer: both in and outside of advertising.

Activate Media in Existing Audio Content

Marketers need to identify the role of audio in brand plans and make sure they're leveraging the screenless environments where consumers are increasingly focusing their attention. The options for seamless insertion into audio content include recorded audio ad spots, host and announcer reads, sonic branding in playlists and music collections, and custom branded content.

Create Branded Content and Experiences

The power of audio for brands lies in how personalized it can be. There's no visual stimulus to tell listeners how the story plays out; listeners "see" the story in the imagination of their mind. Creating branded content across audible channels, therefore, remains a powerful tool for storytelling for brands to create an individualized connection with consumers.

For artists, creators, and brands, this presents an entirely new canvas for storytelling. This year, the Cannes Lions International Festival of Creativity welcomed in the next generation of work with four new audio awards categories; "Native Advertising," "Campaign Led by Audio," "Promotional Content for Publishers & Networks," and "Branded Content/ Podcasts." These awards formally recognize creative work that communicates a brand message through audio excellence, sonic innovation or superior aural storytelling. Taking home the Grand Prix in Radio and Audio was HBO's Westworld: The Maze, an interactive voice experience that immerses the listener in an audio choose-your-own-adventure game.

Best-in-class industry examples of using theatre of the mind through audio storytelling span podcasts, voice-experiences and more.

EXAMPLES OF ACTIVATION OPPORTUNITIES

Terrestrial Radio	Music Streaming	Podcasts	Voice Content	Experiential	Direct Response
DJ reads	Branded playlists	Branded podcasts	Flash briefings	Sound-based experiences	Voice-enabled audio ads
Brand spots	:15/:30 spots	:15/:30 spots	Voice landing pages		
	Sponsored listening	Host reads	Brand skills		
		Bonus episodes			

As people listen more often on their mobile devices, display creative is less likely to be seen due to screen size limitations (compared to tablets/ desktops) and multitasking options both on and off the device. Listeners can switch between apps while audio is playing in the background and can also simply store the devices away in their pocket or backpack. There is a direct correlation with the growing use of smaller devices, the advancement of multi-use operating software, and the need for advertisers to adjust their choice in creative type to reach listeners on the go.

Benefits of Audio-First for Marketers

Digital audio allows listeners to opt-in to their preferred or own stations, genres, artists, playlists and shows, allowing for brands to align messaging/products with listener choices. Podcasts have become a haven for quality audio appreciators and super listeners, who not only opt-in to their spoken content format of choice, but also resonate with hosts who endorse products that they can relate to, especially when it relates to the podcast's categorical content.

Add in data targeting and brands can further home in on more effective reach, optimize campaign investment and reach an audience that is already likely to resonate with the marketer. Advertisers now have the capability to dynamically serve their ads, or even select the appropriate creative on-the-fly, based on a number of data triggers, such as weather, and/or location, and/or time, and/or the sequence of which they heard a series of ads.

There are also voice-enabled ads that allow for brands to converse with listeners for the first time ever, prompting a two-way conversation and creating an element of unprecedented brand engagement with prospective consumers, like chatbots used as customer service tools for many brands.

Brand Considerations for Audio-First Planning

As with all campaigns, advertisers should begin with laying out a well-organized structure of what the business goal is and how leveraging audio channels will help achieve it. Is the brand/product indoor and/or outdoor focused? Should the intended listener have general interests or should they have very niche affinities? When is the best time that a listener will resonate most with the marketer? Is the intention to have the sonic brand achieve the same level of recognition with consumers as the visual logo?

Thought starters for pairing KPIs with screenless audio:

Reach
Consider device proliferation to understand potential scale against the target audience

Frequency
Can frequency caps or sequential creatives be added to the platform? If not, consider potential cross-device frequency.

Brand Lift
Can the platform provide a large enough read on the effect of ad exposures on brand awareness?

Sales

Can tags connect audio activity to digital conversion data? Or, can exposures be tracked and matched to 3P offline sales data?

A pertinent piece of information to consider early on is where the target listener/consumer is. If they're at home, there's a growing likelihood that there will be a smart speaker in their home. There's also a good chance that they're listening to a podcast. If they're commuting to/from and/or are at work, they could be listening to an online streaming platform that is playlist-oriented, be it on a lean-back platform (auto-play) or an active use platform (enabling search options).

Another critical stage is to determine the section of the marketing funnel. If it's an upper-funnel objective, streaming audio (terrestrial radio or pure-play streaming services) helps extend audience reach and amplify brand messages on a brand awareness level, given the medium's prominent and expansive reach. As a marketer moves more into digital, data targeting becomes available, allowing a marketer to further zero in on their desired audience, enabling mid- to lower-funnel messaging. Smart speakers are ever-present in the home and can effectively evoke shoppers with automated convenience by a simple phrase execution.

Measurement

The IAB has established guidelines for measurement of both streaming audio and podcasts.

Streaming audio is measured like most other digital media. Earlier tracking standards for streaming audio ads were merged at the end of 2018. IAB's Digital Audio Ad Standard (DAAST) was retired in favor of aligning audio buying with the VAST standard under the VAST 4.1 template.

By contrast, podcasts are measured today in downloads rather than impressions because the vast majority of podcast listening applications do not provide per-listener playback information. Podcast audio measurement has been standardized under the IAB Podcast Measurement Technical Guidelines. In December 2018, the IAB launched a certification program for podcast hosting platforms to verify that their download numbers are in compliance with the guidelines, so that advertisers can feel secure in the numbers they're seeing across vendors and publishers.

Traditionally, broadcast radio has been measured by Nielsen panels across web traffic, call volume, sales, brand, and retail. This type of measurement is relevant where radio is streamed to screenless devices and, in certain cases, the tracking can be matched back to radio app users for deterministic exposure to advertising. Nielsen has historically been the standard for radio, with others like Triton Digital Webcast Metrics in recent years measuring online reach and providing credible, validated data that enables audio publishers around the world to analyze the consumption of their audio content.

Smart speakers and other screenless devices can present additional challenges, as each device and platform may offer limited measurement capabilities. Standards for these new devices are still emerging.

For more information on how to measure an audio ad buy, please see the IAB 2019 Digital Audio Buyers Guide 2.0.

Attribution

Digital audio advertising can be attributed three ways:

1. **Indirect Attribution**

   Many podcast advertisements are measured using traditional offline mechanisms like coupon codes (e.g., "enter code THEDAILY at checkout") and vanity URLs (e.g., "visit mattress.com/thedaily"). These mechanisms allow for some measure of attribution despite the lack of cookies or pixel data and are still used by the majority of direct response advertisers on podcasts. While emerging tools allow some level of direct attribution for podcast advertising, indirect methods are still the most common method.

2. **Direct Attribution**

   Many streaming audio platforms support direct attribution by firing a pixel or passing the mobile advertising ID at the time of the ad impression.

   In broadcast radio, a publisher's controlled apps also supports direct attribution. For consumption in third-party apps, deterministic modeling from an app-based panel bridges the gap to direct attribution in a one-to-many medium.

   iHeartRadio pioneered this methodology by leveraging its app users who listen to streaming broadcast radio as a deterministic data set. Matching app users exposed to broadcast ads creates a panel that can match to attribution data. From there, data models connect the data out to project attribution across the wider broadcast audience. Attribution options include first-party brand data, retail foot traffic, sales, prescriptions, and lead generation.

3. **Other Metrics**

   Directly attributed impressions can also be linked with other first- and third-party data sources, like purchases, footfall data, and social media activity.

   Brand advertisers can measure how audio contributes to their campaign goals through surveys and other methods. Surveys combined with direct and indirect measurement can offer brand metrics throughout the funnel, from awareness and purchase intent to engagement with a brand's website or other media.

Conclusion

Digital audio is in the midst of a rebirth with more consumers listening to more audio in varied environments on a diverse array of devices. Growth projections indicate that this will continue for the foreseeable future. Along with the increase in content options and software to access audio, the explosion of devices offering screenless consumption promises to further propel digital audio, opening doors for new listeners and creating the next generation of consumption habits.

A tremendous opportunity lies in store for marketers to open a new channel for reaching consumers in meaningful, impactful, and effective ways. Smart speakers, voice activated in-car dashboards, Smart TVs, gaming consoles, smartwatches and connected devices are but a few of the new developments increasingly making it possible for brands to tell their stories to relevant, amenable audiences in audio only moments.

It is key, however, that each device be treated on its own merit, leveraging each one's unique benefits to be an effective channel. Account for creative considerations, measurement opportunities and limitations, and impact on user experience. Mastering these will ensure investments in digital audio by marketers and entrepreneurs will be in a marketer's media mix.

It is only the beginning of how Gen Z and Millennials will shape audio consumption for years to come.