

BasisElect

2026 POLITICAL ADVERTISING ELECTION BOOTCAMP:
WINNING WITH AUDIO

Your Hosts



Sean Duggan

VP, Candidates & Causes

NPR, ABC/ESPN Radio, Comcast,
MySpace, Pandora, SiriusXM



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CBS, iHeart Radio, Pandora, SiriusXM

WELCOME TO BASIS BOOTCAMP SESSION

Winning with Audio in '26

- **THE AUDIO MARKETPLACE**
 - Audience Scale
 - Listenership Trends
- **AUDIO INVESTMENT GAP**
 - Political Advertising Trends
 - Audio Opportunity
- **CHANGING STREAMING MARKET**
 - Top Players
 - Targeting Tools
 - Inventory
 - Strategy/Planning
- **PODCASTING MARKET**
 - Targeting Tools
 - Inventory
 - Strategy/Planning
- **ASK THE EXPERTS**
 - John Padua, VP Media Buying, Trilogy
 - Liz Ring, Director, Performance Marketing, Direct Persuasion
- **Q&A**

Award Winning Tech & Services

Powering agencies and consultants to win in politics, public affairs, and advocacy with cutting-edge political tech and expertise.

THE TEAM

Since 2006, our growing DC team of award-winning political experts have planned, bought, and executed campaigns across every digital channel: CTV, SOCIAL, AUDIO, DISPLAY

THE SERVICE

Flexible Service solutions, Raving Fan service, priority support, and client education from the industry's top thought leaders.

\$1B+

Media Spend Managed
Annually

10,000+

State & Local
Campaigns since 2006

45+

Political Media
Experts

15+

Years Powering
Political Campaigns

Award Winning Tech

2025 Ad Week Best Buy-side DSP

2025 Frost & Sullivan Global Leader: Customer Value Creation

STREAMING AUDIO MARKETPLACE



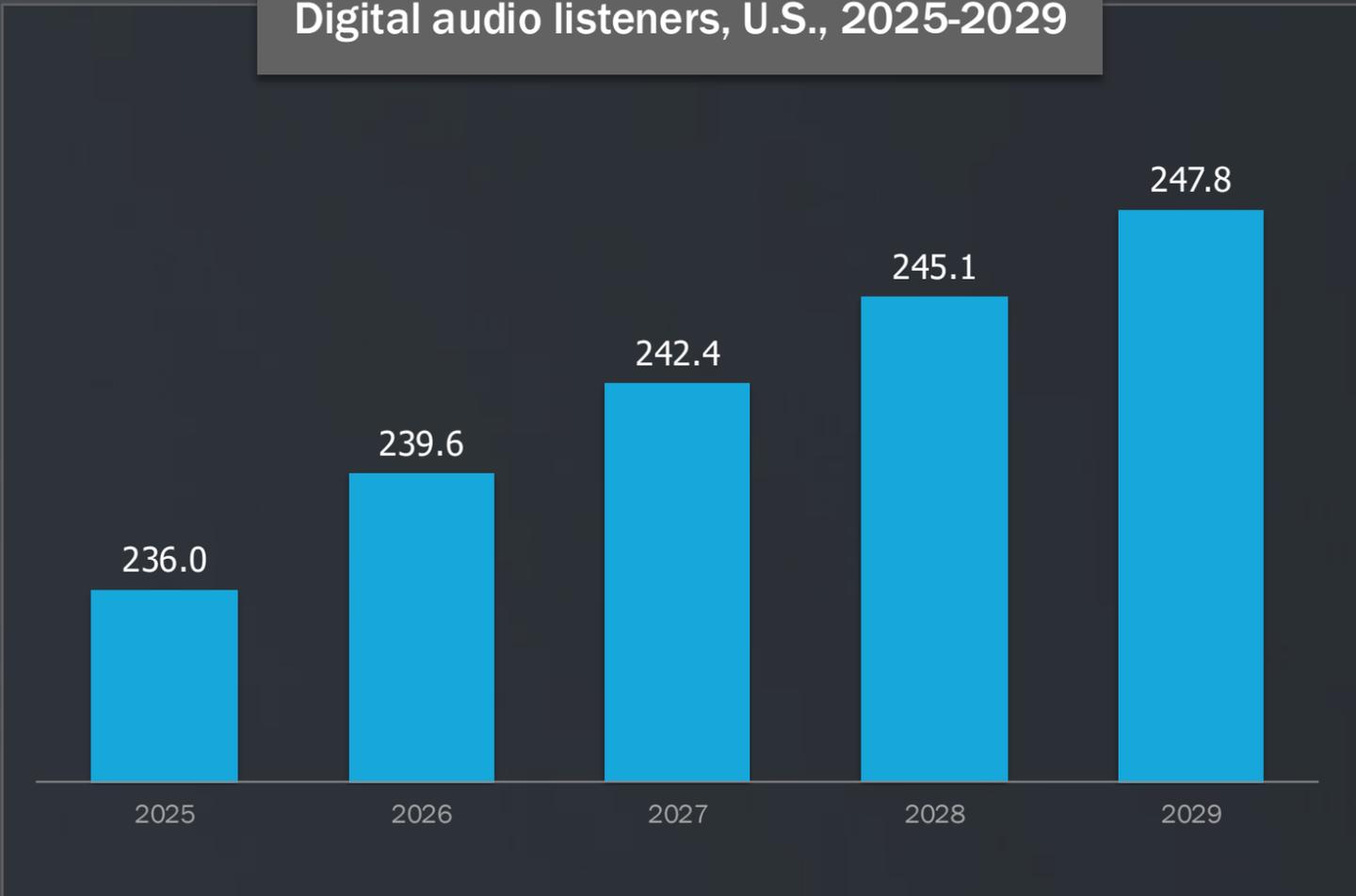
SPOILER ALERT!

INVEST MORE IN AUDIO

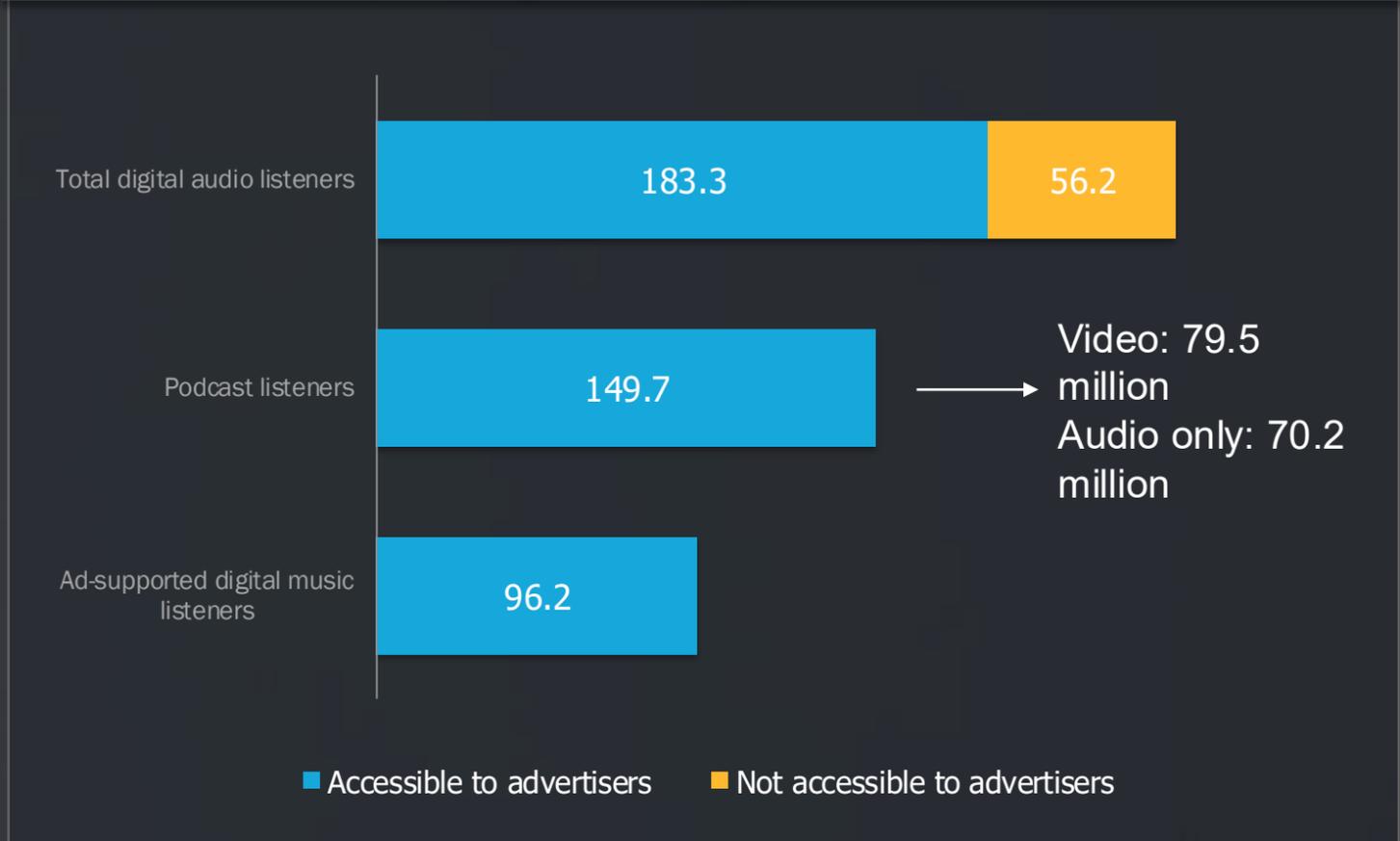


Audio Growth + Audience Growth

Digital audio listeners, U.S., 2025-2029



U.S. total digital audio listeners, by content type and ad accessibility (in millions), 2026



Digital audio listenership is projected to increase from 236 million in 2025 to nearly 248 million by 2029. Of the total audience, about 183 million listeners are accessible to advertisers—driven largely by podcast consumption (149.7M) and ad-supported music streaming (96.2M)—while roughly 56 million listeners remain ad-free.

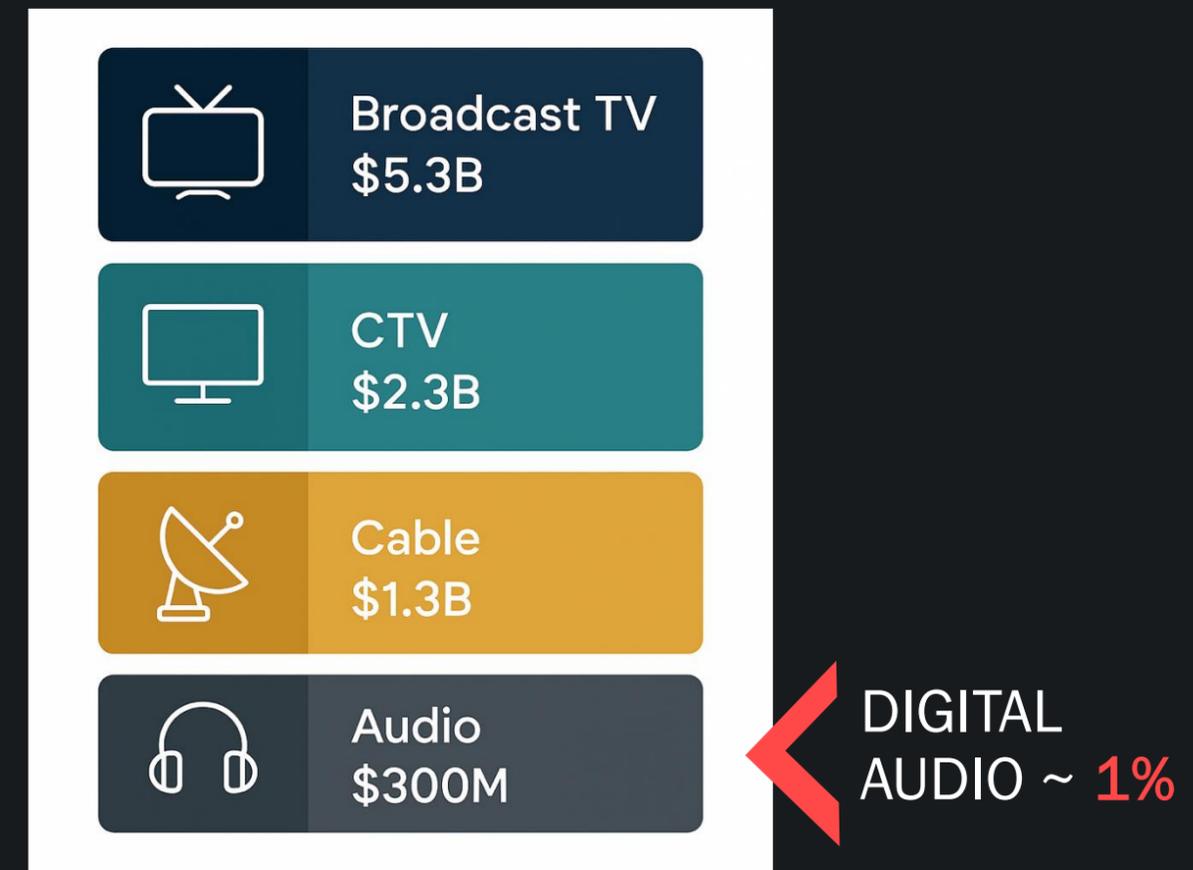
Audio Investment Gap

Consumption vs Investment is Skewed

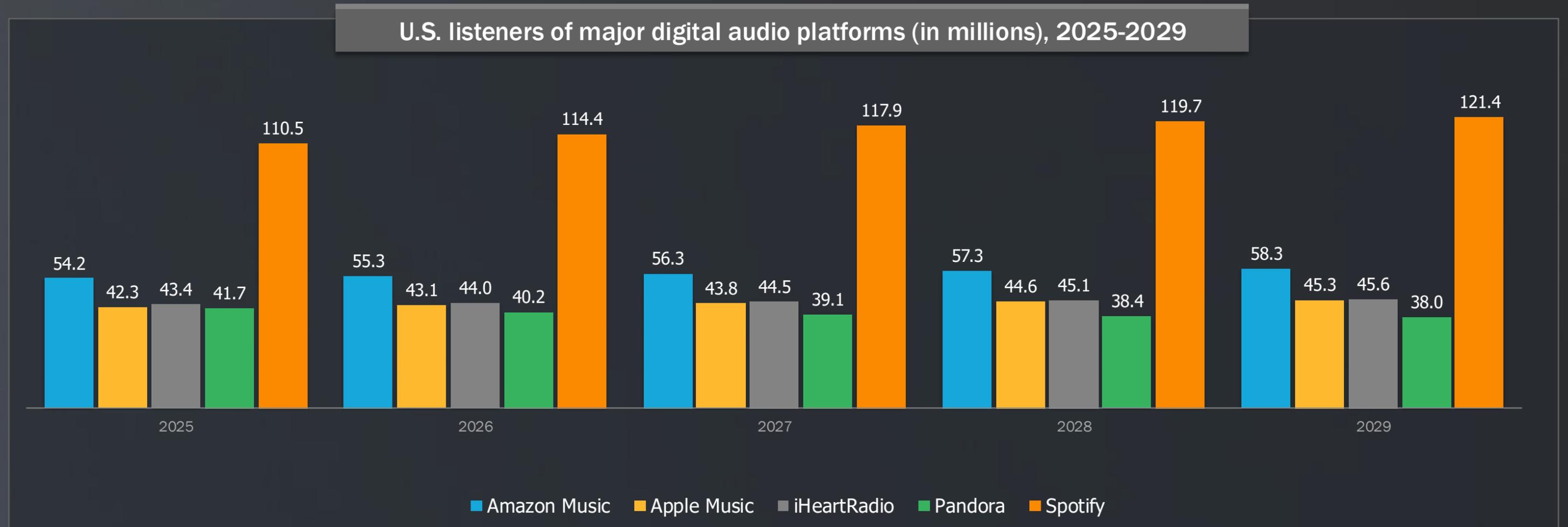
- 20% of daily media consumption is with audio.
- Podcast Listenership~115M weekly listeners.
- A18+ Spend 4 hours/day with audio.

💡 Implication: Audio is a high-attention, under-utilized voter reach platform

2024 Election Ad Spend



Streaming Share of Ear 2025-2029



Spotify is projected to grow from about 110 million listeners in 2025 to over 121 million by 2029. Amazon Music follows with steady growth from roughly 54 million to 58 million, while Apple Music, iHeartRadio, and Pandora each maintain audiences in the 38–46 million range, highlighting Spotify’s lead in the digital audio landscape.

Streaming Market Leaders

STREAMING AUDIO MARKETPLACE



SPOTIFY

Global leader over 751MM listeners

Podcasts represent 35% of listening

Strong ad-free subscriber growth



PANDORA/SIRIUSXM

21% of total audio across streaming/podcasting

Strong ad-supported listener base

Older skewing demo



iHEART

Primarily broadcast audience, growing podcast player

Strong News/Talk programming



DAX

10 years growing digital streaming exchange

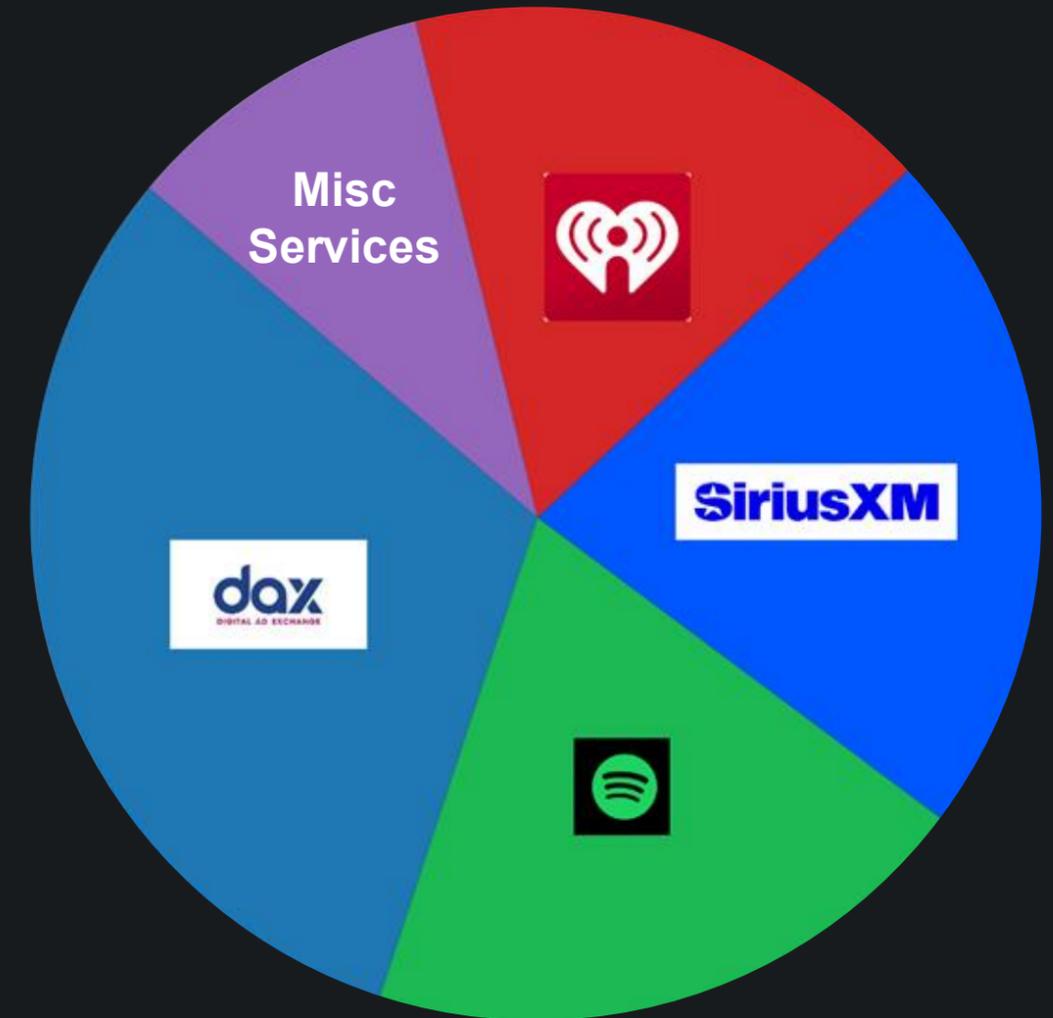
100% focus on ad-supported premium audio: music, news/talk, sports, entertainment

40+ million unique exclusive listener reach

Ad Supported Audience Reach

MARKETPLACE

- Spotify: global scale; strong podcast share: high premium/ad free subscription base.
- Pandora/SiriusXM: Pandora strong older listener reach and targeting solutions.
- I-Heart: Very strong podcast growth. Digital streaming scale a challenge at local level (non-broadcast).
- DAX: #1 ad-supported digital audio network + strong data targeting.



**Estimate ad supported market share based on Edison Share of Ear, eMarketer, DAX 2025 Marketing/Research.*

Why Networks Like DAX Matter

Big-3 (Pandora, I-Heart, Spotify) buys can miss large segments of ad-supported listeners.

DAX aggregates exclusive supply for incremental reach.

Show-level and station-level transparency & reporting.

TARGETING TOOLS

- ★ Multicultural network to reach Spanish-speaking voters.
- ★ Dynamic geo-targeting
- ★ 60K+ podcasts on music, sports, news and more.
- ★ 350+ terrestrial US radio stations





100+ million
MONTHLY LISTENERS

DAX PARTNERS



THE PODCASTING MARKETPLACE



Podcast Talent Wars



Howard Stern Helped Make Them Billions. Can Podcasts Do the Same?

SiriusXM, the company famous for car radio, has recently climbed the podcast charts by betting hundreds of millions of dollars on shows like “Call Her Daddy” and “SmartLess.”



PODCAST GROWTH

HOME > BUSINESS > DIGITAL

Amazon Strikes Deal For LeBron ‘Mind The Game’

The podcast has added Steve Nash as a co-host and will be distributed

BY CAITLIN HUSTON MARCH 26, 2025 8:49AM



Trevor Noah Moves His ‘What Now?’ Podcast Deal From Spotify to SiriusXM

By Todd Spangler



Got a Tip? Newsletters U.S. Edition VARIETY

Home > Digital > News Sep 11, 2024 7:30am PT

Podcast Pay Dirt: Why Top Hosts Like Joe Rogan, Kelce Brothers, Alex Cooper Are Landing Big-Bucks Deals

Nine-figure talent pacts reflect health of growing sector – and underscore heightened battle for mass audiences

By Todd Spangler



How Kara Swisher Scaled Even Higher

The tech journalist and co-host of “Pivot” with Scott Galloway has a novel multimillion-dollar podcast contract with Vox Media, is in talks about a CNN series and has a slew of other ventures.



The Podcast Universe is Complicated

Reaching listeners requires advertising across many podcast networks.

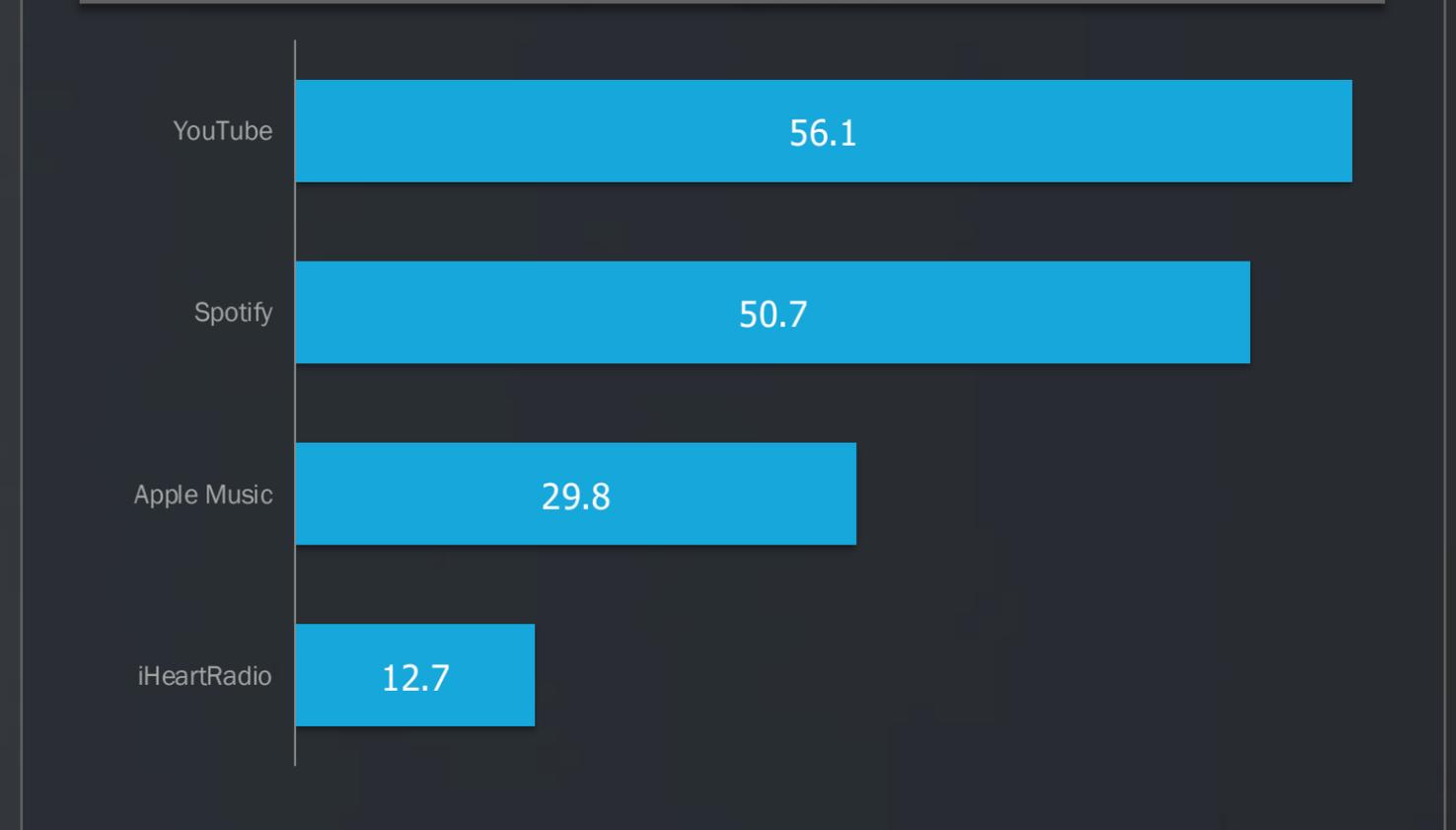


Podcast Market in 2026

U.S. podcast listeners, 2023–2029 (millions)



U.S. podcast listeners/viewers of major digital audio platforms (millions), 2026



Among major platforms, YouTube reaches the largest podcast audience (56.1M), followed by Spotify (50.7M), with Apple Music and iHeartRadio reaching smaller but still meaningful podcast audiences.

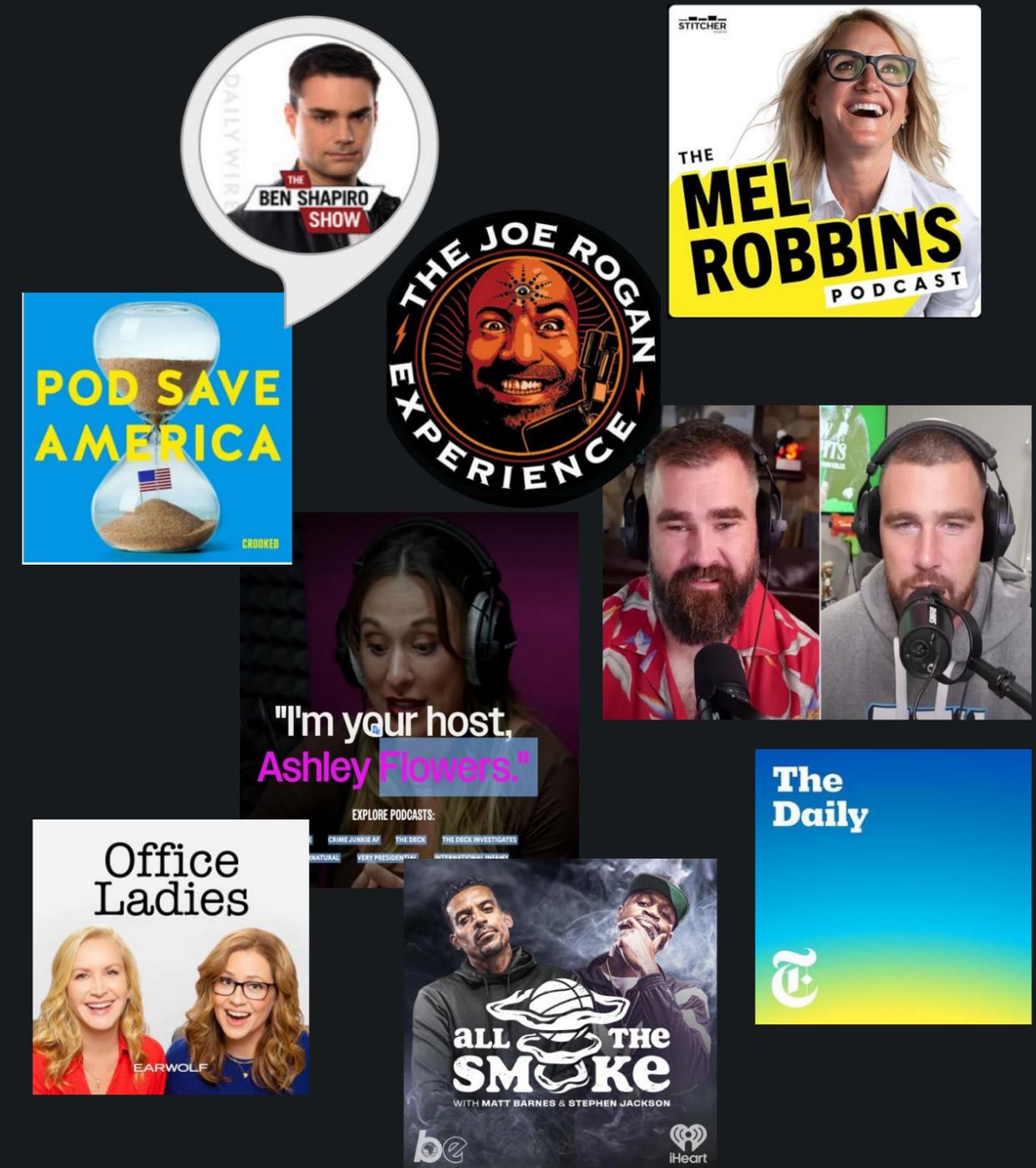
Podcasts: Opportunities & Challenges

Opportunities

- Trust in hosts leads to higher engagement with listeners, high message receptivity of host-read ads
- Great platform for advocacy campaigns
- Leverage programmatic/DSP buying/Non-Live Read Ads

Challenges

- Limited availability of political / elections-related inventory especially in smaller geos. Most talent will **not** accept political due to risk of perceived endorsement



THE POWER OF AUDIO



CTV + Audio: Underutilized Combo

- ✓ **Expanded reach and frequency:** CTV delivers high visual impact in-home; audio extends reach outside the living room (mobility), increases total weekly frequency, and fills dayparts CTV can't (commute, workout, work).
- ✓ **Complementary attention states:** CTV captures high visual attention at home; audio captures multitasking and commutes. Messaging repeated across both formats improves memory encoding and campaign recall.
- ✓ **Cross-platform creative strategies:** Use consistent creative themes, with CTV showing the product and audio reinforcing key benefit/messages/CTA. Host reads can add authenticity; CTV provides demonstration and brand cues.



Audio: Reach + Efficiency



*Video streaming services are ad-supported subscriptions.

Roku (47.7M), Pandora (45.8M), Pluto TV (43.5M), and Hulu (39.9M) each reach roughly half of Spotify's audience.

Winning with Audio

Ask the Experts



John Padua
VP Media Buying
Trilogy Interactive



Liz Ring
Director of Performance Marketing
Direct Persuasion



Winning Creative Examples

TRILOGY INTERACTIVE



HMP

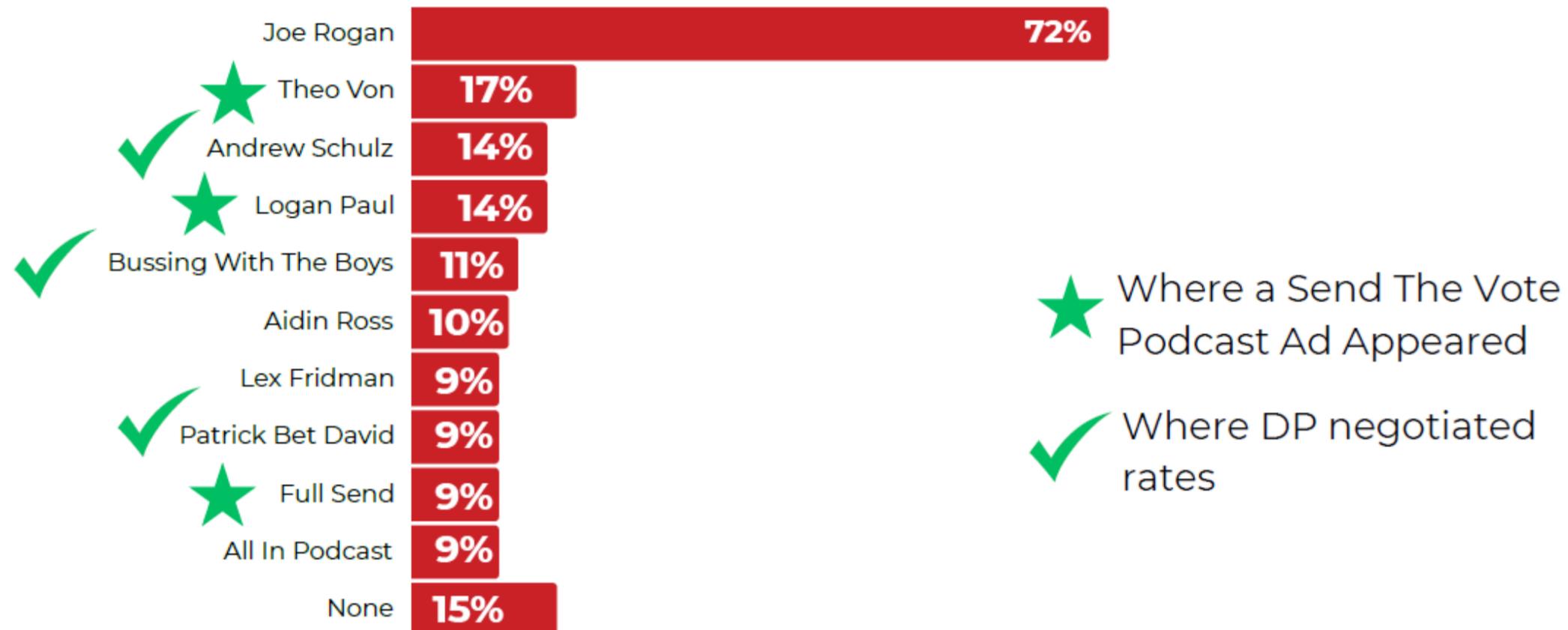


PODCAST STRATEGY

DIRECT PERSUASION

55% of voters said a Trump podcast appearance had a **great deal or somewhat of an influence on their vote**

Percentage of voters who saw Trump on a podcast or livestream before ED



PODCAST STRATEGY

DIRECT PERSUASION

Podcasts Reached Over **7 MILLION** Voters

	Estimated Reach	# of Spots	Opt Ins	Cost Per Reach	Cost Per Opt In
Kill Tony	3,400,000	1	359	\$0.03	\$237
The Tim Dillon Show	1,000,000	2	104	\$0.05	\$481
Talk Tuah	1,150,000	4	91	\$0.06	\$791
Tiny Meat Gang	210,000	2	17	\$0.04	\$544
BS w/ Jake Paul	700,000	2	13	\$0.05	\$2,769
Adam Carolla Show	700,000	4	8	\$0.02	\$1,350



Q&A



Best Practice Takeaways

- Streaming Audio: **Efficient + CTV Reach extension**
- **Lower Political Ad Load** compared to other channels
- Podcast: **Powerful advocacy solutions** + earned media potential
- Prioritize Races & **Lock In Inventory Early** in high demand states
- **Align Audio Message with CTV** / YouTube Sequencing
- Creative: **Low cost of production**; Multiple Formats (:15/:30/:60)
- **Route Scripts Early** for Legal & Platform Review



BasisElect

How we can help deliver listeners (aka voters) for you.



Dedicated
investment/media
buying team



Preferred
Pricing/Exclusive
Inventory



Full service
support



Full election
regulation/advertising
compliance





THANK YOU!

BasisElect

We look forward to helping you win. See you in April at our Winning with CTV Session!

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Basis Bootcamp: Winning with Audio

