How to reach and resonate with the audio-engaged customers of today.
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Introduction

Smart speakers have changed the way many people move throughout their days. Everything from common household chores to shopping can be easier when all that is needed is a voice. With a simple voice request, smart speaker users turn on lights, control the thermostat, unlock the front door, start cars, obtain news and weather updates, play music, and more. When it comes to shopping, smart speaker users are empowered to interact with brands, research product information, and make purchases, all by voice.

Smart speakers are changing the way consumers interact with media in the home as well. Smart speaker users have access to a nearly unlimited amount of audio content, simply by asking for it. Smart speaker users are empowered to discover new artists, build custom playlists and watchlists, and select from millions of songs and podcasts, all through voice-powered audio experiences.

Amazon smart speaker users are one of the largest smart speaker consumer segments, and they are distinguished from other Connected Consumers and General Consumers in demographics, psychographics, media consumption, and shopping patterns. Amazon Ads wants to help brands better understand this audience, and learn how to reach and engage them in relevant ways.

In this white paper, we will learn more about Amazon Connected Audio Customers, a unique subsection of Connected Consumers who use their Amazon smart speakers at least once per month. This document presents research insights from the Connected Consumer study, executed by Ipsos and Amazon Ads, which surveyed 3,000 American consumers ages 18-64, including 768 Amazon Connected Audio Customers.
In this research, we reference three audience groups:

**General Consumers**
Also referred to as general population, this group represents the total sample of respondents who participated in this study.

**Connected Consumers**
Consumers who reported using any smart media device at least monthly, including smart TVs, smart speakers or displays, and streaming devices.

**Amazon Connected Audio Customers**
A subset of Connected Consumers who reported owning and using Alexa-enabled smart speakers (e.g. Amazon Echo, Amazon Echo Show, or other Alexa-enabled devices like Sonos) at least once per month.

This white paper serves as an audio edition to the Connected Consumer study, and aims to help brands dive deep into the nuances of Amazon Connected Audio Customers, answering:

1. **Who are Amazon Connected Audio Customers?**
   What are their demographic attributes? How do they feel about themselves and the world around them? How do they differ from other Connected Consumers, and General Consumers?

2. **Why are Amazon Connected Audio Customers a meaningful customer for brands to engage?**
   What are their shopping and purchase behaviors? Why should brands pay attention?

3. **How do Amazon Connected Audio Customers engage - with each other and brands?**
   How are they engaging and interacting with brands? What types of content and brand messaging resonates most for them? How are these preferences nuanced from other Connected or General Consumers?

4. **How can brands reach, engage, and inspire with Amazon Connected Audio Customers?**
   And how is Amazon Ads uniquely positioned to help you reach them?
— **Who are Amazon Connected Audio Customers?**

Amazon Connected Audio Customers are a unique group of tech-savvy, affluent, and influential younger adults who frequently adapt to new trends, and share their brand experiences with others.
WHO ARE AMAZON CONNECTED AUDIO CUSTOMERS?

The Connected Consumer study revealed one in four (25%) General Consumers are Amazon Connected Audio Customers. A majority (60%) of Amazon Connected Audio Customers own more than one smart speaker, averaging 2.3 smart speakers per person. 93% of Amazon Connected Audio Customers report using their smart speakers at least weekly, and 61% use them every single day.

Amazon Connected Audio Customers are typically younger and more affluent adults than both General Consumers and their larger Connected Consumer parent group. 67% of Amazon Connected Audio Customers are ages 18-44, which is younger than Connected Consumers (62%) and the General Population (58%).

The average annual household income of Amazon Connected Audio Customers is $92k, compared to $71k for General Consumers, and $80k for Connected Consumers. Interestingly, one of the largest demographic differences between the three groups is parental status. 53% of Amazon Connected Audio Customers reported having a child <18 years, over-indexing General Consumers by 51% and Connected Consumers by 29%.

Percent of each group reports having a child <18 years

<table>
<thead>
<tr>
<th>Group</th>
<th>Percent</th>
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<tbody>
<tr>
<td>General Consumers</td>
<td>35%</td>
</tr>
<tr>
<td>Connected Consumers</td>
<td>41%</td>
</tr>
<tr>
<td>Amazon Connected Audio Customers</td>
<td>53%</td>
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According to survey responses, Amazon Connected Audio Customers are a tech-savvy cohort of early adopters, trendsetters, and opinion leaders. They are value-driven customers that strive to learn more about themselves and the world around them. While they often spend time researching products or services before purchasing, 84% of Amazon Connected Audio Customers reported when they find brands they like, they stick with them. Once a brand has earned their loyalty, 53% of Amazon Connected Audio Customers reported they tend to share brand experiences on social media.

Psychographic traits by segment

Making the connection:

Align audio and visual brand messaging to how this audience defines themselves. They are younger adults, affluent, value-oriented, tech-savvy, enjoy traveling, and open to learning about your brand. Once you’ve impressed your audience, these audiences tend to stick with you and the brands they love.

Amazon audio advertising can help your brand activate Amazon Connected Audio Customers at scale. Work with Amazon Ads creative teams to help your brand connect with this tech-savvy group of younger adults, parents, and opinion leaders with the right message in the right context.
— Why are Amazon Connected Audio Customers a meaningful audience for brands to engage?

The life stages and income levels of Amazon Connected Audio Customers suggest stronger purchase power and shopping frequency than General and Connected Consumers. To help make purchase decisions, Amazon Connected Audio Customers report leaning into advertising, especially audio ads and ads through smart devices, as a source for new brands, products, and services.
Amazon Connected Audio Customers love to shop and report doing so frequently. 29% of Amazon Connected Audio Customers report making an online purchase every day, which is 61% higher than General Consumers (18%) and 45% greater than Connected Consumers (20%). 60% of Amazon Connected Audio Customers agree, “shopping is one of my favorite past-times,” over-indexing both General (47%) and Connected (52%) Consumers.

Amazon Connected Audio Customers over-index other consumer segments in past purchases of all categories in the study by an average of 30%. For example, in the Technology and Telcom categories, Amazon Connected Audio Customers are 67% more likely than General Consumers to have purchased consumer electronics in the past year (20% vs. 12%), and 50% more likely to have purchased a new mobile device (21% vs. 14%). Amazon Connected Audio Customers also lead General Consumers in past purchases in health and wellness products, fashion apparel, entertainment, and home improvement.

**Purchase Category Index (next 12 months)**
Amazon Connected Audio Customers lean into advertising content to help make purchase decisions, and are particularly attentive to ads delivered through smart devices. **38% of Amazon Connected Audio Customers report paying the most attention to ads delivered through smart devices, which is more than reported attention paid to linear TV (29%) and social media (25%).** When we break out the different types of smart devices, Amazon Connected Audio Customers are 2x more likely than Connected Consumers to pay most attention to ads delivered through smart speakers. Amazon Connected Audio Customers are also 31% more likely than General Consumers and 21% more likely than Connected Consumers to pay most attention to ads that play during streaming audio.

Attention to advertising is growing. 47% of Amazon Connected Audio Customers say they **pay more attention to ads now than 12 months ago**, over-indexing General Consumers by 32% and Connected Consumers by 36%.

**Which of the following types of ads do you typically pay the most attention to?**

- **38%** of Amazon Connected Audio Customers report paying most attention to ads while listening to or viewing content through smart devices, over-indexing General Consumers by 36% and Connected Consumers by 11%.
- Amazon Connected Audio Customers are 2x more likely than Connected Consumers to pay most attention to ads that play through a smart speaker. (10% vs. 5%).
- Amazon Connected Audio Customers are 21% more likely than Connected Consumers to pay most attention to streaming audio ads (17% vs. 14%).

**Making the connection:**

Amazon Connected Audio Customers shop frequently and are willing to pay more for items which they perceive as high-quality. They rely on brand messaging to help them make their purchase decisions, and pay most attention to messages delivered through smart devices. Amazon Ads can help your brand reach these audiences at times when your message is likely to resonate.

Create audio ads your customers can connect with by reaching them on the devices and media they pay most attention to. Engage with current customers and introduce new customers to your brand by using Amazon Audiences, which incorporate music preferences, shopping, and behavioral signals.
How do Amazon Connected Audio Customers engage — with each other and brands?

Amazon Connected Audio Customers have higher levels of media consumption than General Consumers and Connected Consumers, and are differentiated most from these groups by their level of engagement with audio. They prefer voice-activated audio for entertainment and view streaming TV as a source of staying up-to-date and connecting with community, suggesting audio and video ads are better together.
Amazon Connected Audio Customers live a highly-connected lifestyle. They are more likely than other Connected Consumers to use a multitude of smart devices including smart security systems, doorbells, lighting, thermostat, vacuums, pet products, wearable tech, appliances, and smart cars or navigation systems.

**Smart device usage**

Amazon Connected Audio Customers use media at higher rates than the General and Connected Consumer groups. They over-index General Consumers on weekly tune-in to broadcast TV (index 105), streaming TV (index 108), and social media visits (index for Facebook = 111).

However, the media behavior that separates Amazon Connected Audio Customers from other groups is their engagement with audio.

Amazon Connected Audio Customers are more engaged with audio content than both General Consumers and Connected Consumers. For example, 85% of Amazon Connected Audio Customers listen to streaming audio content at least monthly, which over-indexes the 69% of General Consumers and 73% of Connected Consumers who do the same. A majority (62%) of Amazon Connected Audio Customers stream audio content from ad-supported services, and they typically tune into an average of 3.1 different audio streaming services every month.
HOW DO CONNECTED CONSUMERS CONNECT — WITH EACH OTHER AND WITH BRANDS?

Preference for audio content extends to new audio media as well. Amazon Connected Audio Customers are 64% more likely than General Consumers and 50% more likely than Connected Consumers to visit social media sites with audio features. The Amazon Connected Audio Customer group prefers to interact with brands using voice request, and 39% are more likely to respond to a brand message if the ad is enabled for voice interaction.

Amazon Connected Audio Customers view audio as a social activity, with 83% reporting co-listening to streaming audio at least some of the time. In contrast, General Consumers co-listen to streaming audio 71% of the time, and Connected Consumers co-listen to streaming audio 74% of the time.

Amazon Connected Audio Customers are heavy streaming video consumers too, with 96% streaming video on demand on a weekly basis, over-indexing both General and Connected Consumers by 8%. However, Amazon Connected Audio Customers lean into streaming video content for different purposes than General Consumers and Connected Consumers. For example, Amazon Connected Audio Customers are 9% less likely than Connected Consumers to watch streaming videos to unwind. Instead, Amazon Connected Audio Customers are more likely than both Connected Consumers and General Consumers to
HOW DO CONNECTED CONSUMERS CONNECT — WITH EACH OTHER AND WITH BRANDS?

Watch streaming video content for the purpose of connecting with community (index = 122), and staying up-to-date with current events (index = 115). Both Amazon Connected Audio Customers and Connected Consumers are more likely than General Consumers to use streaming video to discover and learn new things (index = 111). These different need states imply audio and video are better together, as they help customers learn about products and brands across different need states and contexts.

**Key streaming motivations**

- **Unwind**
  to relax, decompress, de-stress, or do something where you don’t have to think too much

- **Connect**
  to be a part of the hype/excitement, join the social conversation, or feel like a part of something bigger than yourself (e.g., a community or group you have something in common with)

- **Stay up to date**
  to be in the know about things that matter to you or feel informed about what’s going on in the world

- **Discover**
  to learn something new, find useful information on a topic or task, or build a perspective or point of view on something

Amazon Connected Audio Customers connect to media through a variety of devices throughout their days, and as a result, they consume more media than other consumers. They are unique in their amount of audio consumption, preference for audio content, and desire to connect with brands through voice-interactive ads. Amazon Ads can help brands connect with these customers and ensure their audio and video messages are aligned with consumer ad preferences.

**Making the connection:**

Leverage Amazon audio and video ads in tandem to help reach consumers across a variety of contextual states. Use Amazon Ads creative services to build video messages that help viewers stay informed and connected, and audio messages for an engaging interactive or co-listening experience.
For customers to get the most out of brand messages, an audio-centric ad experience with interactive options is key. Here’s how Amazon Ads can help brands stand out.
HOW CAN BRANDS ENGAGE, DELIGHT, AND CONNECT WITH AMAZON CONNECTED AUDIO CUSTOMERS?

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**Speak your brand values, authentically.**

Amazon Connected Audio Customers appreciate brands that share similar values as they do. In fact, more than half (54%) of Amazon Connected Audio Customers have avoided business that didn’t share their values, which over-indexes General Consumers by 26% and other Connected Consumers by 15%.

Amazon Connected Audio Customers report they have avoided a business that didn’t share their values, over-indexing General Consumers by 26% and Connected Consumers by 15%.

Amazon Connected Audio Customers report they want to support small and local businesses. 79% of Amazon Connected Audio Customers report they try to support local and small businesses, over-indexing Connected Consumers by 7% and General Consumers by 15%.

Amazon Connected Audio Customers report they try to support small and local businesses.

Amazon Connected Audio Customers over-index General Consumers on self-reported traits such as playful (index = 112), adventurous (index = 111), and social (index = 120), and brands who authentically embrace these tones in their messaging are likely to be well-received. However, Amazon Connected Audio Customers under-index both General Consumers (index = 88) and Connected Consumers (index = 92) on reported identification with sarcasm. This finding indicates that brands who use sarcasm intermittently to garner audience attention are likely to be dismissed. However, for brands who have embraced the tone as a brand value or a consistent and authentic part of the brand experience, sarcasm may be a welcomed and engaging approach to advertising.

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**Use Amazon Audiences to create relevant and contextually aligned messaging.**

A majority of Amazon Connected Audio Customers (65%) report they find it helpful when ads are relevant to them. They are more likely than both General Consumers and Connected Consumers to report appreciation for ads that are based on purchase history or personal interests. Context is important for the Amazon Connected Audio Customer group, as 64% reported they appreciate when ads are aligned with what they are currently watching, reading, or listening to.
HOW CAN BRANDS CAN ENGAGE, DELIGHT, AND CONNECT WITH AMAZON CONNECTED AUDIO CUSTOMERS?

Attitudes toward ad relevance

Amazon Audiences can help brands reach the Amazon Connected Audio Consumer segment in key moments and environments when customers will find the most value in ad messaging. For example, Amazon Genre Audiences use behavioral signals such as audio listening patterns to understand what types of music customers listen to most frequently. These audiences may help introduce music fans to the entertainment, theater productions, movies, or attractions most aligned with their interests. Lifestyle audiences may help fitness or health and beauty brands reach and inform the customers most likely to find their message beneficial. Lastly, in-market audiences reach customers who are in-market for a given product to help those customers make informed purchase decisions.

Reach consumers across devices with frequency.

Amazon Connected Audio Customers are fluidly interacting with several different screens, devices, wearables, and media channels throughout the day. Given this high level of media exposure across an array of channels, it is no surprise Amazon Connected Audio Customers are 20% more likely than General Consumers to report needing to hear or see an ad at least a few times before acting on it.
HOW CAN BRANDS CAN ENGAGE, DELIGHT, AND CONNECT WITH AMAZON CONNECTED AUDIO CUSTOMERS?

Amazon Connected Audio Customers are most likely to engage with and find value in your brand messaging if it is delivered across a variety of channels and contexts. In addition to audio, video, and display advertising, brands may consider reaching customers through creative advertising on shipping boxes or shipping bags. Not only do Amazon Connected Audio Customers shop more frequently (as described in Part Two), they are also 29% more likely than other audience segments to pay most attention to ads on shipping boxes or bags. Customers who have access to brand messaging across all of these channels, and who hear or see the brand message multiple times, are more likely to act on it.

Use audio and video advertising together to reach consumers across different need states.

We’ve learned through this study that Amazon Connected Audio Customers use streaming video differently than Connected Consumers and General Consumers. They are less likely to use video to unwind, and more likely use video to learn or discover new things, connect with their community and to stay up-to-date with current events. This finding indicates brands using audio and video together can reach and engage Amazon Connected Audio Customers across a variety of need states and contexts.

Consumers may benefit from brands that use this insight to plan different but complementary messaging for audio and video. For example, because audio is often played in a co-listening environment, an advertiser may choose audio ads to message products with social benefits. In contrast, because video is used as an opportunity to discover new things and stay up-to-date with current events, brands may choose to reach customers on streaming video with more functional messaging. Examples for functional messaging include new product launches, a short-term sales event, an upcoming concert, or a product with practical purposes such as cooking or cleaning.

Because of the different contexts under which consumers are using media, consumers will often get the most value from brands that reach them on both audio and video ads.
Explore innovative ad formats including interactivity with advertising.

Smart speakers helped bring interactive advertising formats to life, allowing consumers to have a two-way, voice-enabled engagement with brands. **Amazon Connected Audio Customers are 63% more likely than General Consumers and 44% more likely than Connected Consumers to act on an ad if they can interact with voice request.**

Brands seeking to engage customers with interactive ad features should be conscientious of how the interactivity may disrupt the viewer or listener experience. **41% of Amazon Connected Audio Customers are more likely to respond to an ad if they can make a purchase directly using voice or remote without disruption.**

Making the connection:

Relevant, authentic, contextually-aligned, and innovative audio ad messaging are all essential to break through to Amazon Connected Audio Customers. Amazon Ads can help brands create interactive and relevant ad experiences that reach and resonate with the Amazon Ads can help brands create interactive and relevant ad experiences that reach and resonate with the audio-engaged customers of today.

Amazon Ads can help consumers connect directly with brands by developing creative tactics that mitigate the feeling of disruption and increase consumer benefits of interactive ad features. We do this by using storytelling, interactive ad formats, content sponsorships, and more, all delivered across a variety of connected and out-of-home media channels using a breadth of audience signals.
Conclusion

Marketers today have a difficult task of not only being top-of-mind, but tip-of-tongue, for consumers in an increasingly voice-first world. In households where smart speakers are routine, consumers often rely on brands to provide easy ways to learn about new products and make purchase decisions through hands-free, voice-enabled experiences. Consumers have never been more connected than they are today, and Amazon Connected Audio Customers are leading the way in media consumption levels and engagement with connected devices. With access to a nearly unlimited supply of voice-activated audio content, Amazon Connected Audio Customers have no shortage of options for entertainment, shopping, and information-gathering. This presents an opportunity for brands to reach a highly engaged and influential audience, but it also means that it is imperative for brands to have a deep understanding of these customers and their audio preferences to successfully build a lasting connection.

At Amazon Ads, we continue to innovate our audio ads experience and are obsessed with finding new ways to help you make relevant, insight-driven, meaningful connections with your customers.

- Learn who Amazon Connected Audio Customers are to better inform your media strategy and how to reach and resonate with these audio-engaged and voice-first consumers.
- Reach Amazon Connected Audio Customers with Amazon Ads, and embrace your brand’s unique and authentic values in your messaging.
- Engage relevant buyers with audio and video at key contextual moments by using Amazon Ads’ audience insights based on listening, viewing, and shopping signals.
- Inform customers of your brand or product by using Amazon audio advertising to deliver your message beyond the screen with frequency across audio, video, display, and shipping boxes.
- Diversify your mix of creative tactics by leveraging interactive ad formats, content sponsorships, and contextually-relevant audio ads. Work with Amazon Ads to create messages that are non-disruptive and likely to benefit your customers.