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# **SPEED OF SOUND**

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**The essential guide to how digital  
innovation is accelerating the  
audio advantage for advertisers**

# INTRODUCTION

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This study examines the rapid growth in listening across the continually evolving UK commercial audio\* landscape and reviews the increasing advantage that digital audio presents for advertisers.

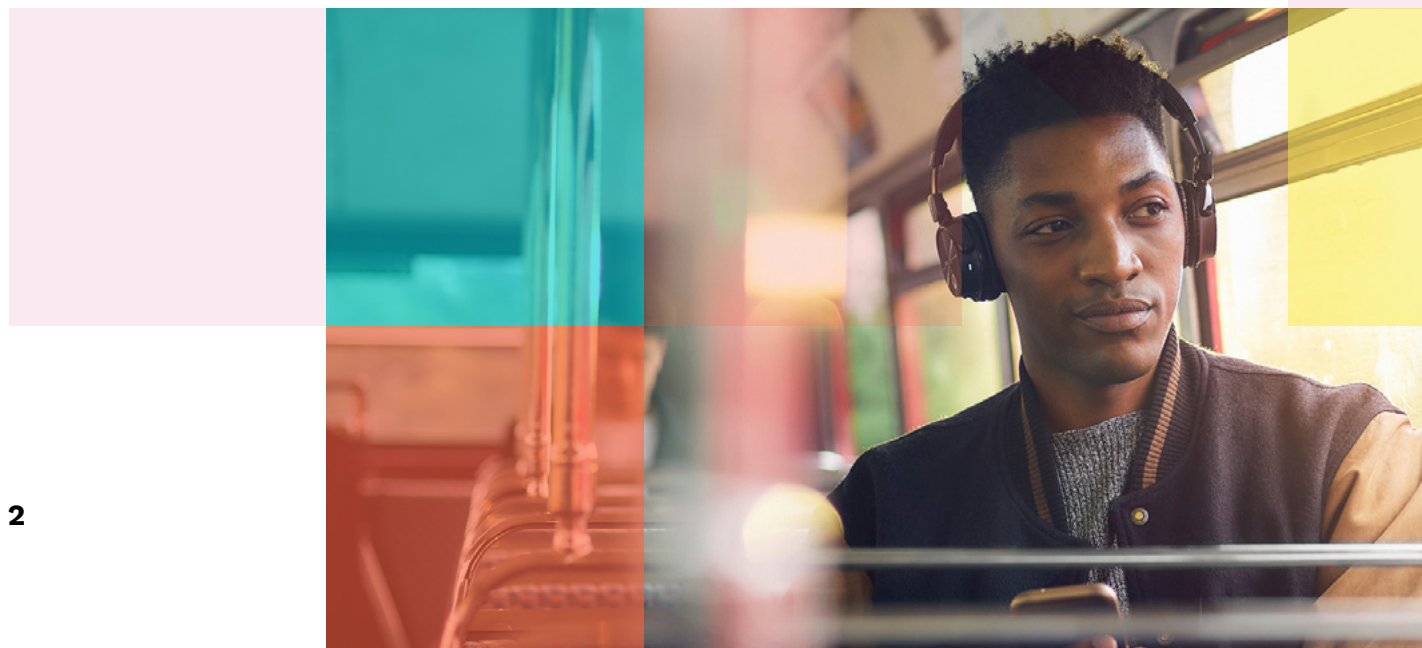
Developed by research consultancy MTM, in partnership with Radiocentre, the report is based on a combination of quantitative industry data and interviews conducted with expert stakeholders from across the audio industry.

The aim is to present an overview of market developments, exploring the roles that digital audio can play for advertisers, and practical guidance on how its impact can be optimised through best practice.

The report concludes with a summary of the range in digital audio formats, the targeting opportunities these present, and how they can be accessed. This element focuses specifically on the audio offering of UK commercial broadcasters as these represent the majority of the market, in terms of both audience and advertising revenue.

**\*Commercial audio** refers to all audio services that carry advertising, i.e.

- Broadcast Radio
- Linear Radio via IP
- Non-BBC podcasts
- Free/ad-funded music streaming



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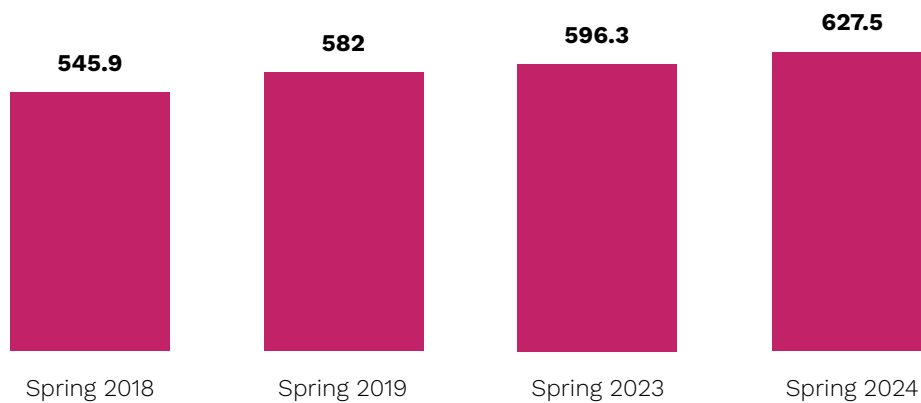
# KEY TAKEAWAYS

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## 1. The audio advertising opportunity is bigger and better than it's ever been.

Connected platforms are driving significant growth in commercial audio audiences (reach and time spent listening). These effects have been underpinned by national brand extensions and new station launches, expanding commercial radio's share of broadcast audiences.

**Total weekly commercial audio listening hours (m)**



**Source:** RAJAR MIDAS\*

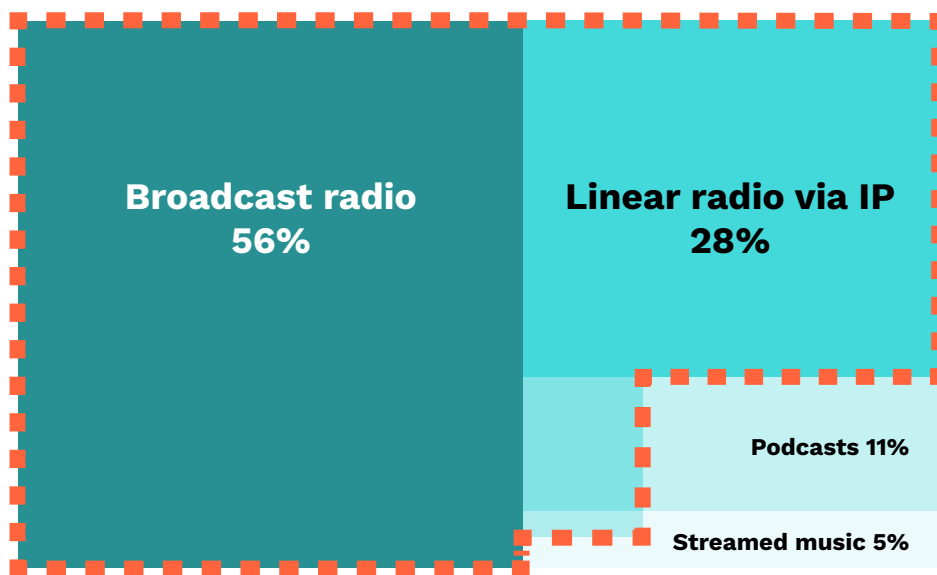
\*Spring data has been used for trend charts for consistent comparison. Due to restrictions on fieldwork during Covid and changes to survey question wording, there is no comparable data available for Spring 20-22.



## 2. Commercial broadcasters lead the way in the UK audio market, accounting for almost 90% of commercial audio listening *and* advertising revenue.

Offering the most rounded and complete audio portfolio, UK commercial broadcasters provide advertisers with easy access to the full potential and effectiveness of audio advertising.

**Commercial broadcasters provide access to c.90% of UK commercial audio listening - area in orange below**



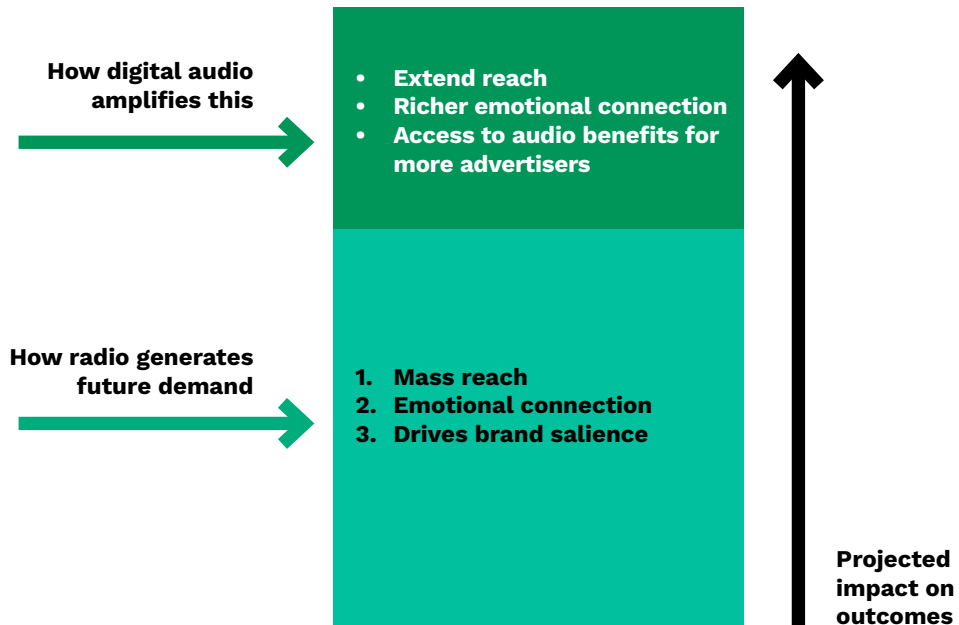
**Base:** % Share of total UK commercial listening time by audio format. Includes ad-funded listening only. Broadcaster radio is FM/AM and DAB. Linear radio via IP is live radio listening on connected devices.

**Source:** Radiocentre analysis of RAJAR MIDAS Summer 2024.

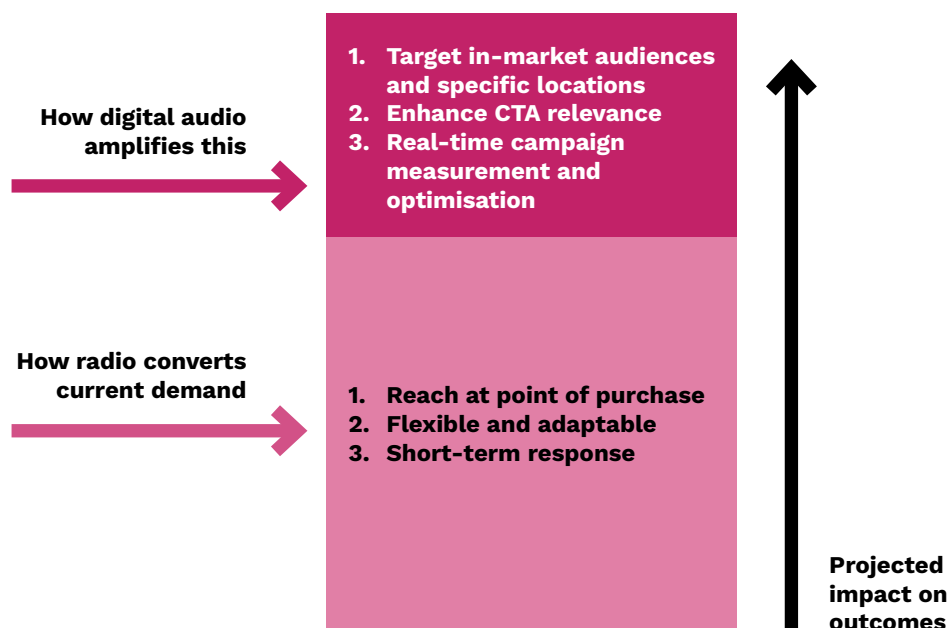
### 3. Audio offers advertisers advantages over other media and is proven effective at both *Demand Generation* and *Demand Conversion*.

Digital audio services possess unique qualities that amplify these advantages and improve overall outcomes for advertisers, as summarised in the infographic below:

#### The audio advantage for *generating future demand*



#### The audio advantage for *converting current demand*



#### 4. Podcasts and emerging innovations will drive future growth in digital audio advertising.

With UK adult weekly reach having doubled from 8% to 16.4% in the last six years and now accounting for 11% of total commercial listening, podcasts have become a firm fixture in audiences' listening habits. This positive momentum is reflected in advertiser spending: the latest UK IAB spend data (2023) demonstrates how podcast ad revenues grew by 43% in the two years to 2023, representing almost half (47%) of total UK digital audio spend. WARC global ad spend forecasts suggest that this impressive growth curve is set to continue in the immediate future, with global podcast revenue predicted to grow +7.9% in 2025 and +6.5% in 2026.

Innovative digital audio formats like in-game audio are also gaining popularity among advertisers and are likely to create new revenue streams for audio, driving market growth and attracting increased investment.



# SECTION 1

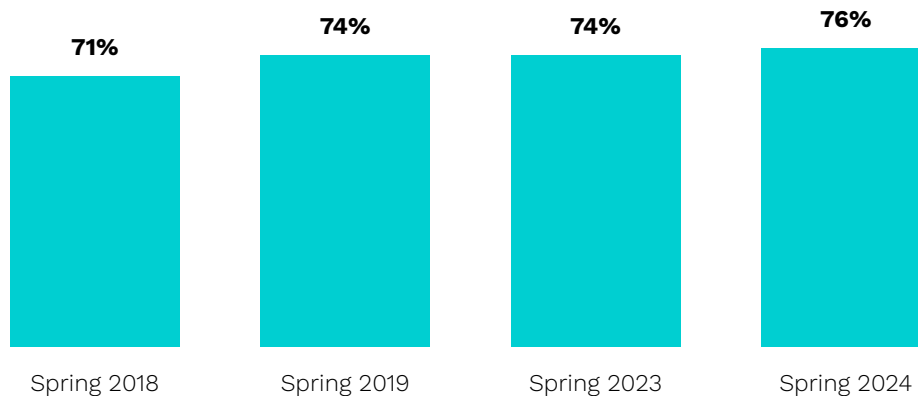
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## UK commercial audio market growth and scale

### a. UK commercial audio listening has reached critical mass and is still growing

The commercial audio sector is thriving, capturing the ears of over three-quarters (76%) of UK adults every week. The market has been growing consistently in recent years, adding an additional 5.3m weekly listeners across the last six years alone.

**Figure 1: Total weekly adult reach (%) of UK commercial audio (2018-2024)**



**Base:** Live commercial radio, non-BBC podcasts, listeners whose main on-demand streaming service is 'free-with ads' **Source:** RAJAR MIDAS\*

\*Spring data has been used for trend charts for consistent comparison. Due to restrictions on fieldwork during Covid and changes to survey question wording, there is no comparable data available for Spring 20-22.

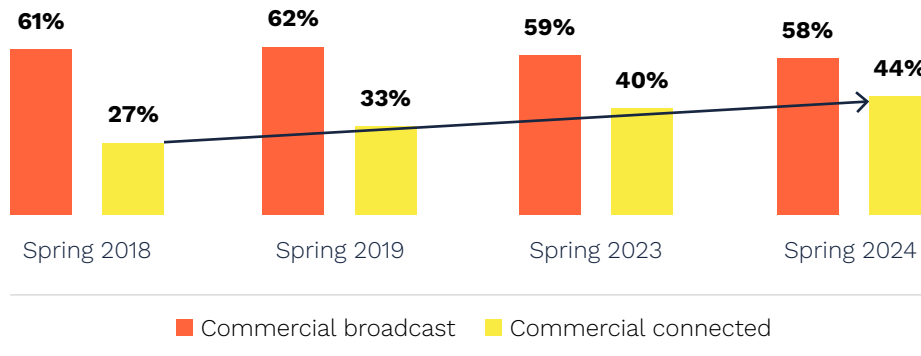
This impressive growth in reach has been supplemented by audiences dedicating more time than ever to commercial audio. In 2024, the average UK adult spent around 15 hours a week immersed in commercial audio content, pushing up total listening time to a new record of 627.5m hours per week (see Fig. 3).



## b. Connected devices are transforming listening habits

Fuelling this expansion in commercial listening is the widespread adoption of connected devices - especially smart speakers - which have transformed how audiences engage with audio. Today, nearly half (44%) of the UK adult population (15+) listens to commercial connected audio each week.

**Figure 2: Total UK commercial audio adult weekly reach (%) by platform, 2018-2024**



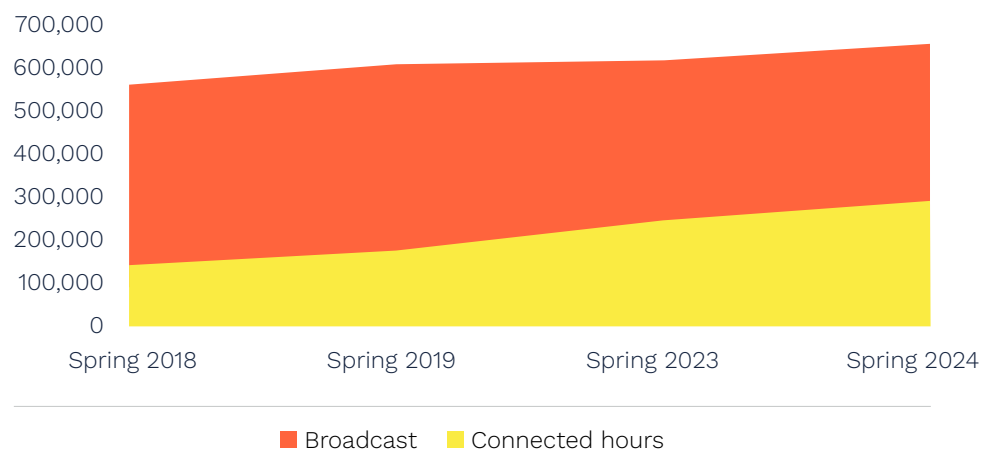
Source: RAJAR MIDAS

## c. Commercial broadcasters lead the UK audio market

Commercial broadcasters have capitalised on this shift by making their content easily accessible on connected devices, providing listeners with direct access to live radio and related podcast content via listening platforms such as Global Player and Bauer's Rayo.

As such, broadcast radio continues to lead listening time within the booming UK audio market, supplemented by complementary pureplay digital audio services attracting new listeners to commercial audio entertainment. Despite the increased competition for share of ear, live radio also remains the most widely accessed form of audio entertainment on connected devices, alone accounting for 71% share of listening on smart speakers.

**Figure 3: Total UK commercial audio listening by platform (000s hours)**

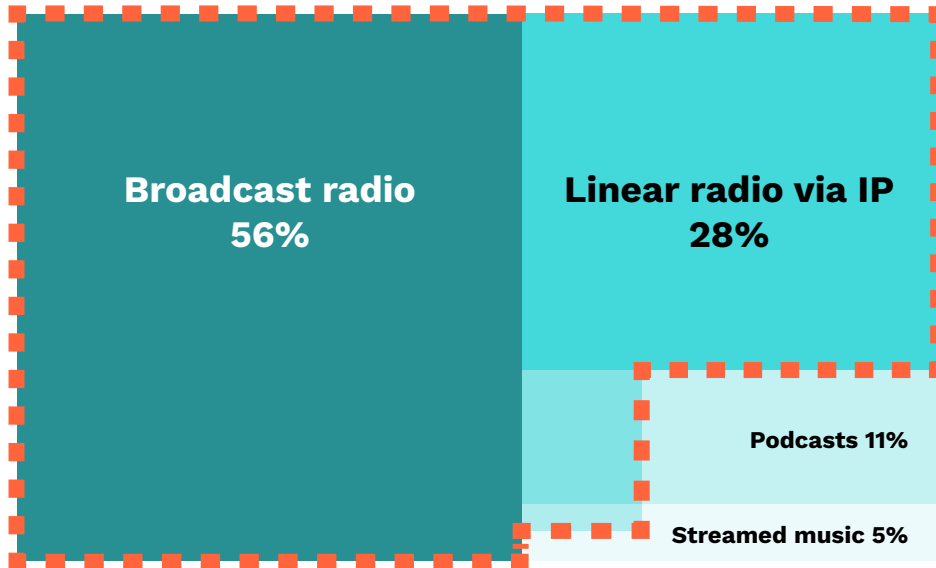


Base: all adults (15+) Source: RAJAR MIDAS

With easy-to-access multi-platform audio content portfolios, commercial broadcasters continue to outshine other forms of commercial audio in terms of share of total UK listening time, including free/ad-supported streaming services.

**Figure 4: Share of total UK commercial audio listening time**

*Commercial broadcasters provide access to c.90% of UK commercial audio listening - area in orange box below*



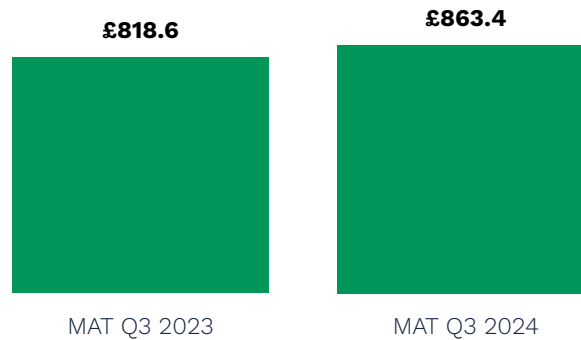
**Base:** % Share of total UK commercial listening time by audio format. Includes ad-funded listening only. Broadcaster radio is FM/AM and DAB. Linear radio via IP is live radio listening on connected devices.

**Source:** Radiocentre analysis of RAJAR MIDAS Summer 2024.

## d. Marketers are increasing investment in audio advertising

This growth in listening has led to a boost in advertising investment. New data from Radiocentre (in collaboration with WARC and IAB) reveals that UK commercial audio advertising revenues (i.e. derived from radio, podcasts, streaming) grew by 5.5% year-on-year in the 12-months to Q3 2024, reaching **£863.4 million**.

**Figure 5: Total UK audio ad revenue (£m) Moving Annual Total (MAT) Q3 2024 vs. 2023**

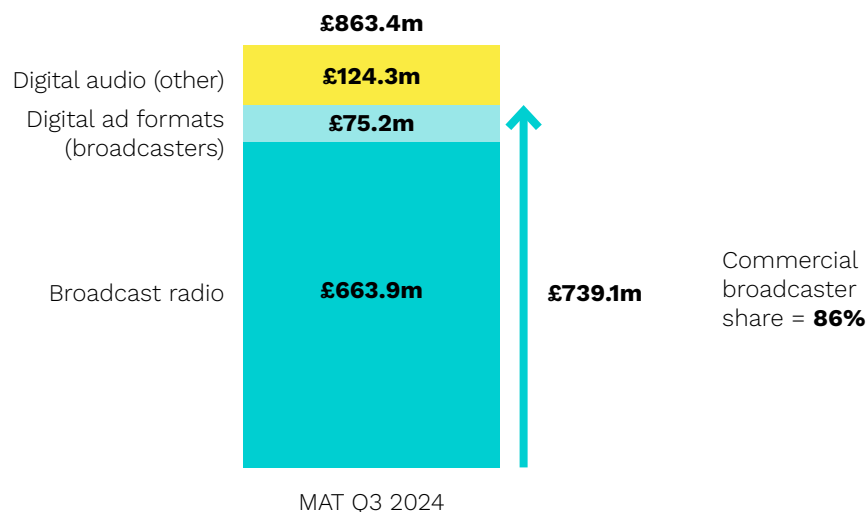


**Base:** All UK Audio advertising revenue (de-duplicated)

**Source:** AA/WARC; Radiocentre: IAB

As demonstrated in Fig. 6, in line with representing the bulk of commercial audio listening time, commercial broadcasters also account for the majority share of total audio ad revenue - 86% - through a mix of advertising and brand partnerships on broadcast radio, live radio delivered via IP, and in owned/3rd party podcasts hosted on commercial broadcaster digital platforms. The remaining 14% of UK audio revenue is sourced from pureplay digital audio providers, generating revenue from advertising placed in independent podcasts and ad-supported streaming services (a proportion of which is also sold by commercial broadcasters).

**Figure 6: Total UK audio ad revenue (£m) MAT Q3 2024**



**Source:** AA/WARC, Radiocentre, IAB

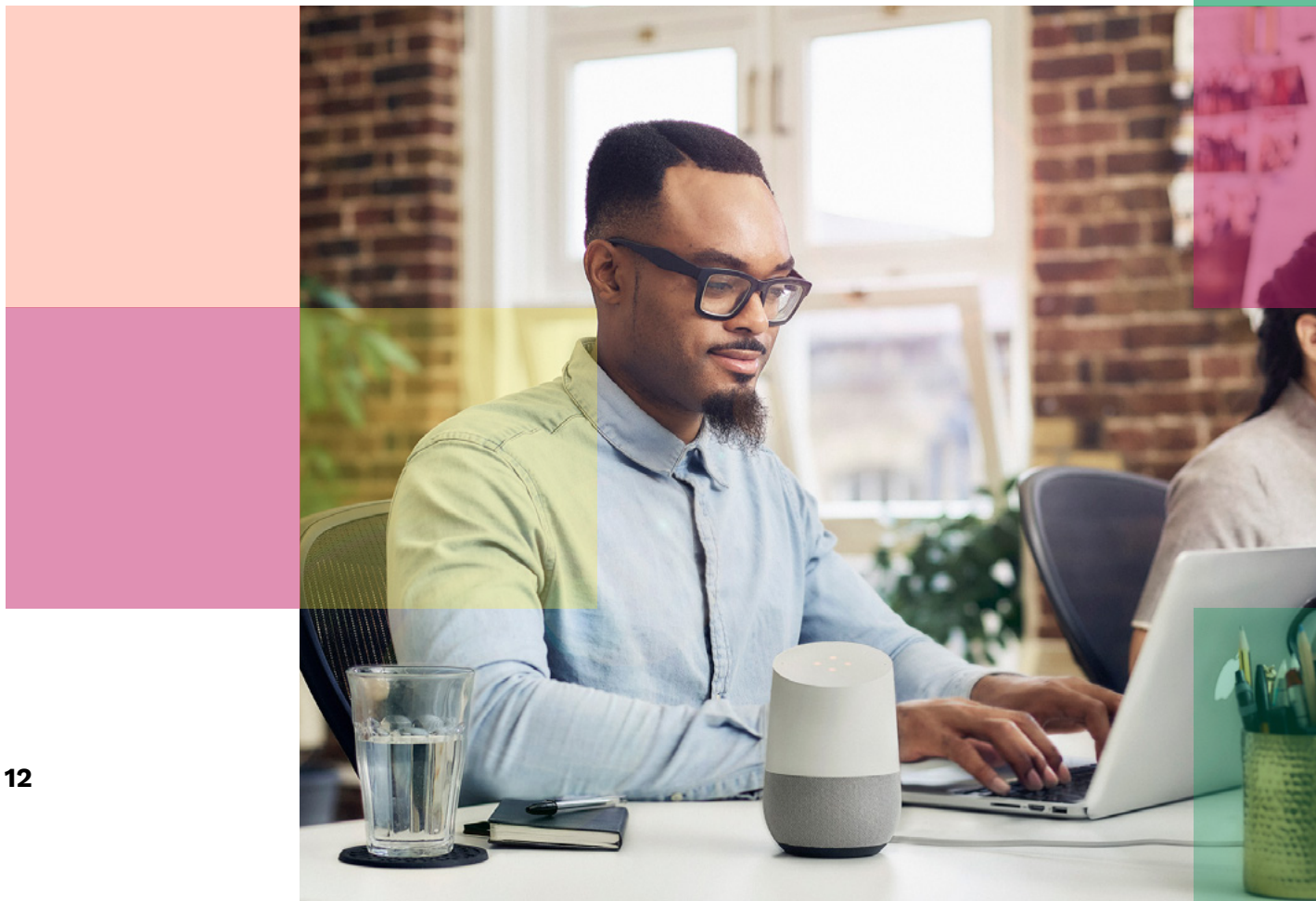
## e. The future of audio advertising is multi-platform

As commercial audio grows and evolves in dynamic ways, advertisers are capitalising on its expanding potential. By combining the proven strengths of traditional commercial audio with the precision of targeted digital audio ads, they are able to deliver multi-platform advertising campaigns combining high reach with sophisticated contextual messages.

This shift is reflected in Adwanted's July 2024 research, which revealed that 35% of linear radio campaigns now incorporate digital audio elements—up from 28% just four years ago<sup>1</sup>. This integration of digital audio into advertising strategies, paired with consistently strong broadcast revenues, is propelling remarkable growth in the commercial audio market.

The latest industry revenue data underscores this momentum. With its unmatched ability to connect with listeners across platforms, commercial audio continues to cement its position as a critical driver of both audience engagement and advertiser success.

<sup>1</sup>According to a report published by Mediatel/Adwanted in June 2022 (updated July 2024), titled 'The Growing UK Audio Landscape'



# SECTION 2

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## The audio advantage for advertisers – and how digital audio formats amplify this

In a world where both the supply and consumption of audio are increasing, it makes sense to review the role that audio can play – and the effects it can deliver - for advertisers.

Les Binet and Peter Field's seminal analysis of the IPA Databank 'The Long and the Short of It' provides helpful structure for this process by describing how brands which use advertising optimally in the long-term balance two types of activity:

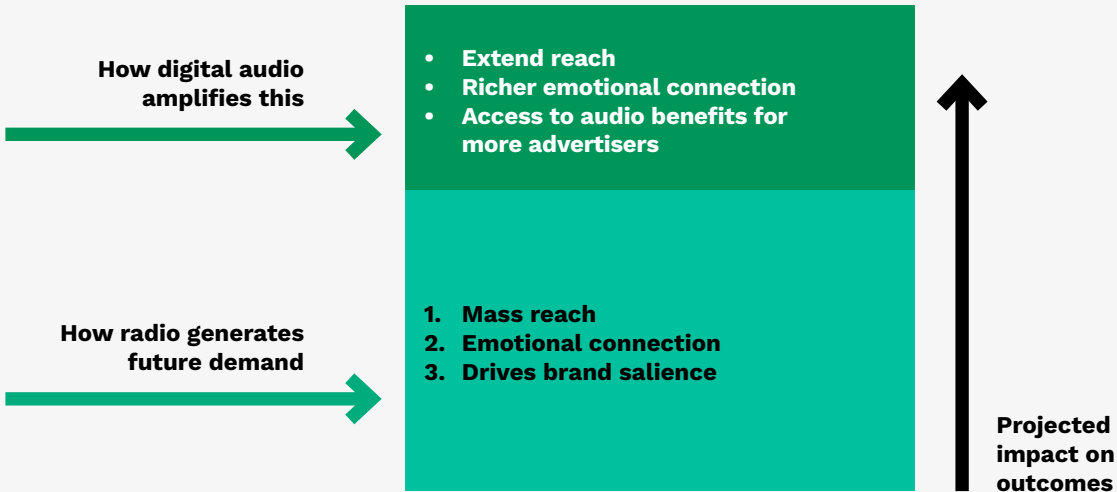
- A.** *Brand-building*, often referred to as **“Demand Generation”**, generally consists of longer-term communication deploying emotional messaging in broadly targeted high-reach media, creating a cumulative effect over time to build favourability towards a brand and, as a result, widen its pool of potential purchasers.
- B.** *Activation*, often referred to as **“Demand Conversion”**, is designed to create a more immediate response, often using rational, promotional messaging and precision targeting to efficiently convert latent consumer demand and drive short-term sales.

**This section considers the available evidence to understand further how commercial audio performs these valuable functions for advertisers.**



# A1. The audio advantage for Demand Generation

**Figure 7: Benefits of audio for generating future demand**

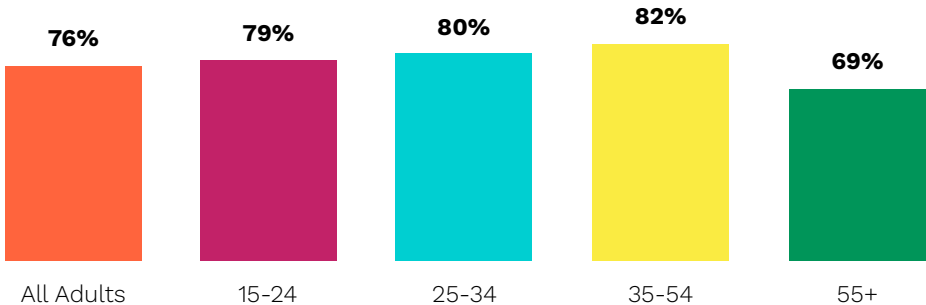


Source: Radiocentre

## 1. Mass reach

As highlighted in the first section of this report, commercial audio weekly reach is high, and time spent listening is growing. With free access on any device, commercial audio allows advertisers to connect with a wide range of listeners - delivering high weekly reach (c. 70%+) across all age groups.

**Figure 8: Commercial audio: weekly reach by age cohort all platforms**



Source: RAJAR MIDAS (Summer 2024)

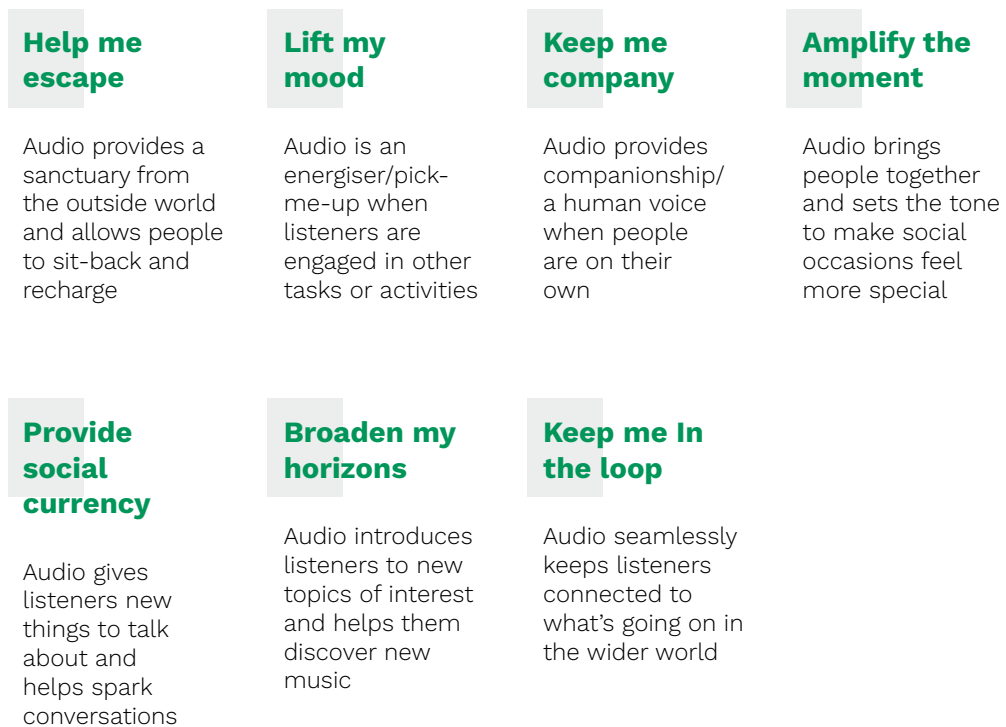
Market data also reveals how a media budget spent on audio advertising delivers multiple times more audience impressions than in any other medium<sup>2</sup>. These factors combined mean that mass reach is more readily attainable and affordable through commercial audio than other media.

## 2. Emotional connection

Commercial audio accompanies listeners as they go about their daily lives, serving them content relevant to their circumstances, listened-to in mainly personal spaces. In this way audio fulfils a wide spectrum of important emotional needs – providing a trusted/safe environment for brands to build a relevant/resonant emotional connection with listeners. A summary of these audio need states is provided in Figure 9 below.

The intimate and habitual nature of listening means that audio content tends to be more trusted than other media. This means audio provides advertisers with a multitude of opportunities to engage mass audiences on an emotional level or at relevant moments and benefit from boosted advertising performance.

**Figure 9: Overview of audio need-states**



**Source:** Generation Audio, Radiocentre

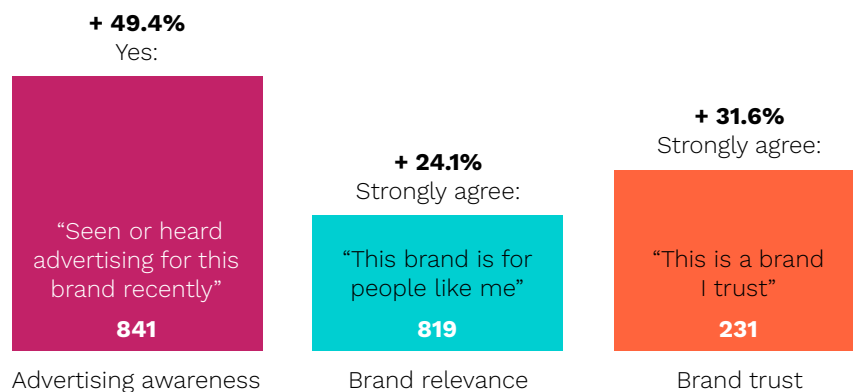
### 3. Drives brand salience

Commercial audio’s powerful combination of mass reach delivery and emotional connection means that it is particularly effective at driving brand salience. Numerous research studies conducted over recent years demonstrate the significant effects that radio advertising has upon demand generation metrics.

#### a. Increasing awareness, relevance, and trust

Analysis of over 800 radio campaigns measured on Radiogauge reveals how, on average, radio advertising increases ad awareness by 49%, brand relevance by 24%, and brand trust by 32%.

**Figure 10: Creating future demand metrics**

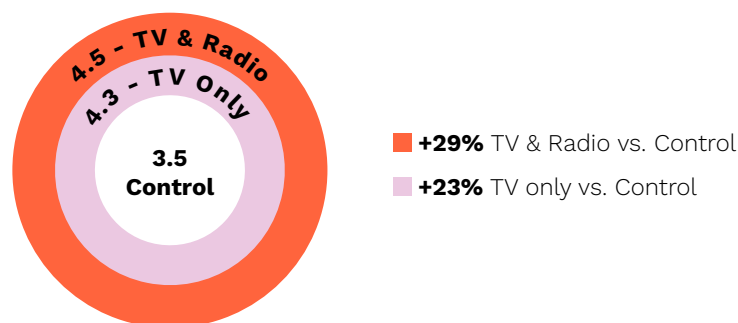


**Base:** All aware of brand/all respondents **Source:** Big Audio Datamine (number of cases in white)

#### b. Boosting brand salience

Radiocentre’s study *Radio, the Brand Multiplier* reveals how, when added to the media mix, radio advertising significantly increases a brand’s network of mental associations, helping brands spring to mind more readily when people are in buying mode.

**Figure 11: Radio advertising expands a brand’s network of mental associations**



**Base:** Average network size (2,732 category buyers making at least one association) **Source:** Differentology

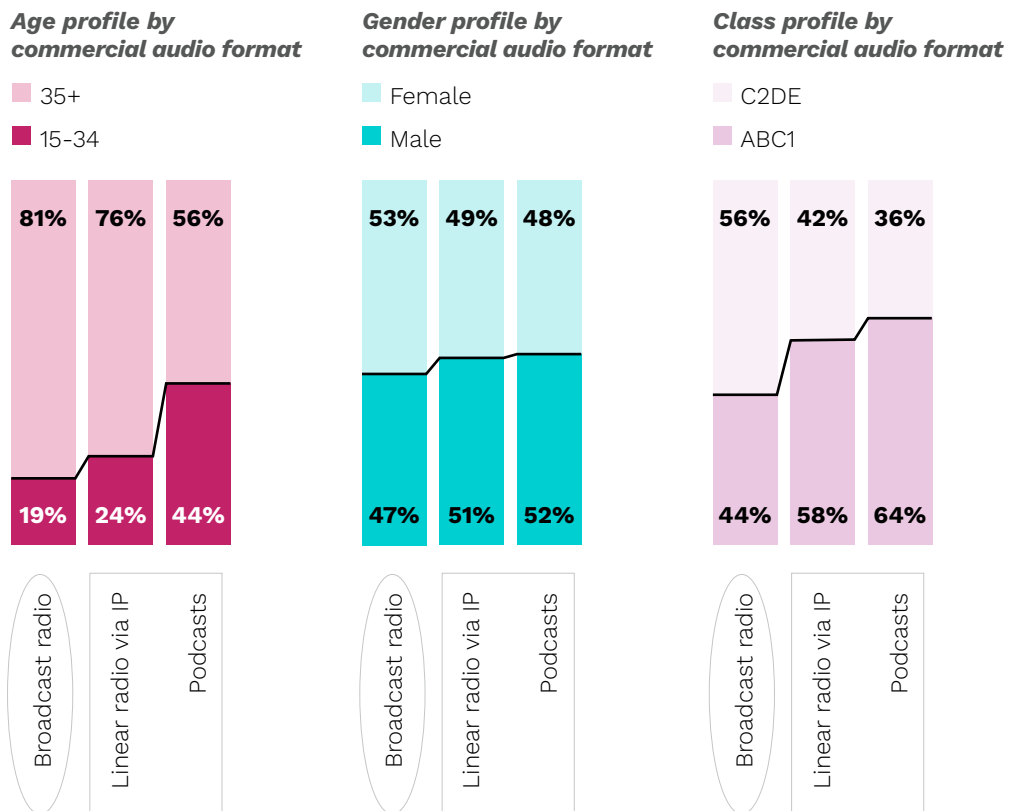
## A2. How digital audio amplifies Demand Generation



### 1. Extend reach

RAJAR MIDAS data demonstrates commercial audio’s mass reach across all demographics at a headline level. Broadcast radio has the highest reach of all audio formats but can be less efficient at reaching certain specific demographics. The audience profiles of individual connected audio formats are highly complementary to broadcast radio. So, by incorporating these formats alongside broadcast radio in a multi-platform audio strategy, advertisers can expand reach efficiently across less-accessible demographics (see audience profiles below).

**Figure 12: Connected audio listening profile is younger, more upmarket and more male – complementing broadcast radio’s mass audience**



**Base:** share of total listening within format (hours) **Source:** RAJAR MIDAS (Summer 2024)

## 2. Richer emotional connection

Digital audio empowers advertisers to use dynamic creative, a powerful tool that enables creative to be tailored to specific audiences, locations, or times of day within a single campaign. Dynamic creative works by automatically activating variations of an ad based on real-time data, such as listener data, geographic location, or time of day. This adaptability is able to deliver more personally relevant messaging to listeners, which can enhance engagement with advertising and drive stronger campaign results.

For example, research demonstrates how audio ads that reference the listener's context or situation (e.g. what they are doing at the time) are much more likely to be actively processed. Radiocentre's *Hear and Now* research study shows how advertising that directly relates to tasks or activities that listeners are participating in benefits from significantly higher levels of engagement (+23%) and memory processing (+22%). Further analysis shows how these effects are so powerful that they can turn average ads into star performers.

## 3. More advertisers can access the benefits of audio

Digital audio reduces the barriers for those seeking to invest in audio advertising. With the ability to create highly targeted campaigns, advertisers can focus on targeting more precise audiences if they do not yet require mass-market exposure. This can help limit the initial investment needed to access audio advertising, particularly for smaller businesses during their initial growth stage.

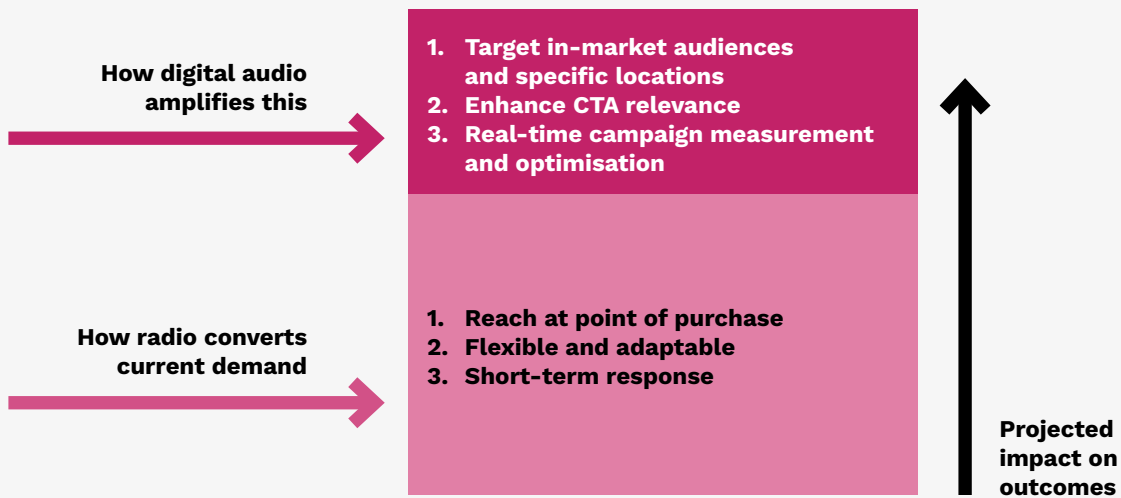
As a result, digital audio makes audio's Demand Generation capabilities (i.e. greater cut-through vs. online display or social media) more accessible for smaller start-ups in the early stages of accelerating growth.





# B1. The audio advantage for Demand Conversion

**Figure 13: Benefits of audio for converting current demand**

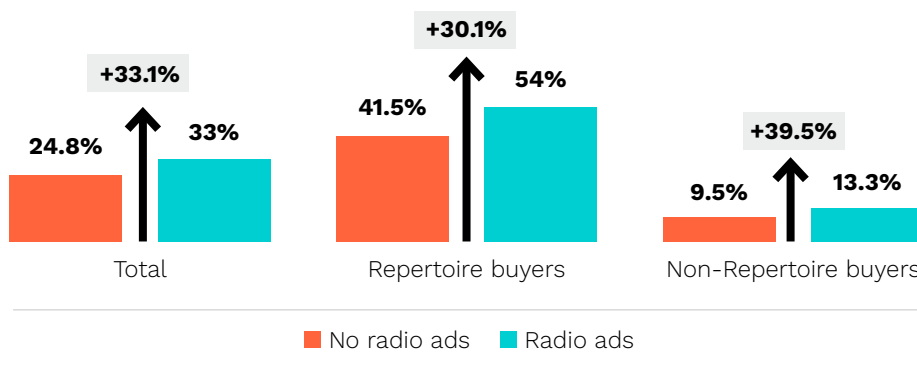


Source: Radiocentre

## 1. Reach at point of purchase

Audio accompanies listeners as they go about their daily lives, serving them content relevant to their circumstances. A distinct benefit of this is that audio advertising allows advertisers to reach consumers at key moments throughout the day, when they are more likely to be making purchasing decisions and be open to influence. Research highlights how audio is able to communicate and stimulate a response when people are engaged in other tasks. Radiocentre’s *Building Shelf Awareness* study demonstrates how, when passively exposed to radio ads during a car journey to the supermarket, respondents were 11% more likely to notice the advertised brands on-shelf and 30% more likely to buy them.

**Figure 14: Reaching shoppers in-car on the way to the supermarket increases purchase intent**



% of respondents claiming that they would buy advertised products. Average across all brands split by current purchase behaviour (test vs. control).

Source: Shoppercentric *Which of these products would you have bought from this shelf?*

## 2. Flexible and adaptable

Audio advertising is highly flexible, allowing advertisers to adapt quickly to changing circumstances. With shorter lead times, audio enables brands to create and launch campaigns quicker than other media, combined with audio's relatively low production costs, this makes it ideal for advertisers seeking to gain an advantage by reacting to short-term opportunities and real-time events, thus enhancing the relevance and impact of campaigns.

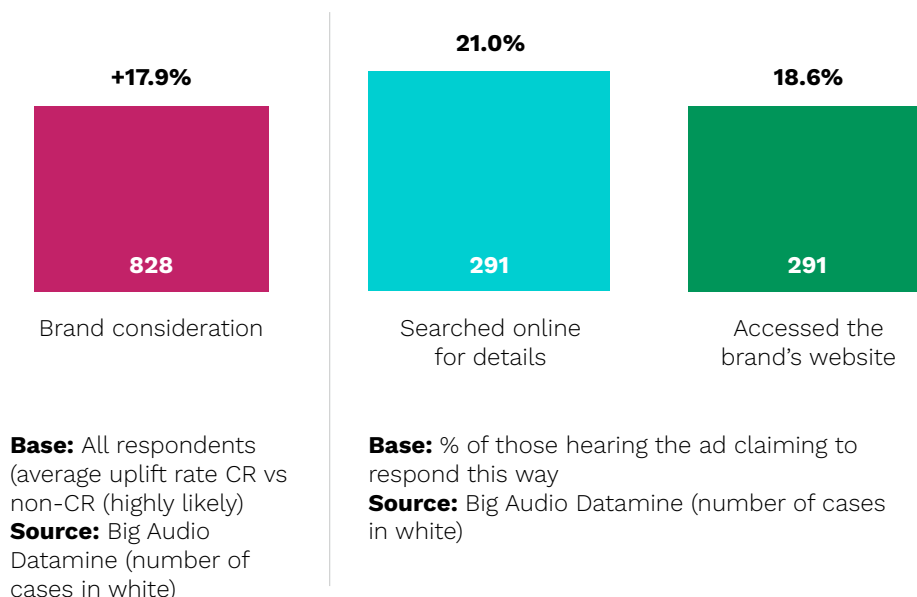
## 3. Short-term response

In reaching consumers closer to the point of purchase, audio advertising is better placed to trigger an immediate response – making it a powerful tool for driving conversion. These effects are evidenced in research studies which demonstrate the significant effects that radio advertising induces on metrics related to demand conversion.

**Figure 15: Audio's effect on Demand Conversion metrics**

### **a. Driving purchase consideration and online response**

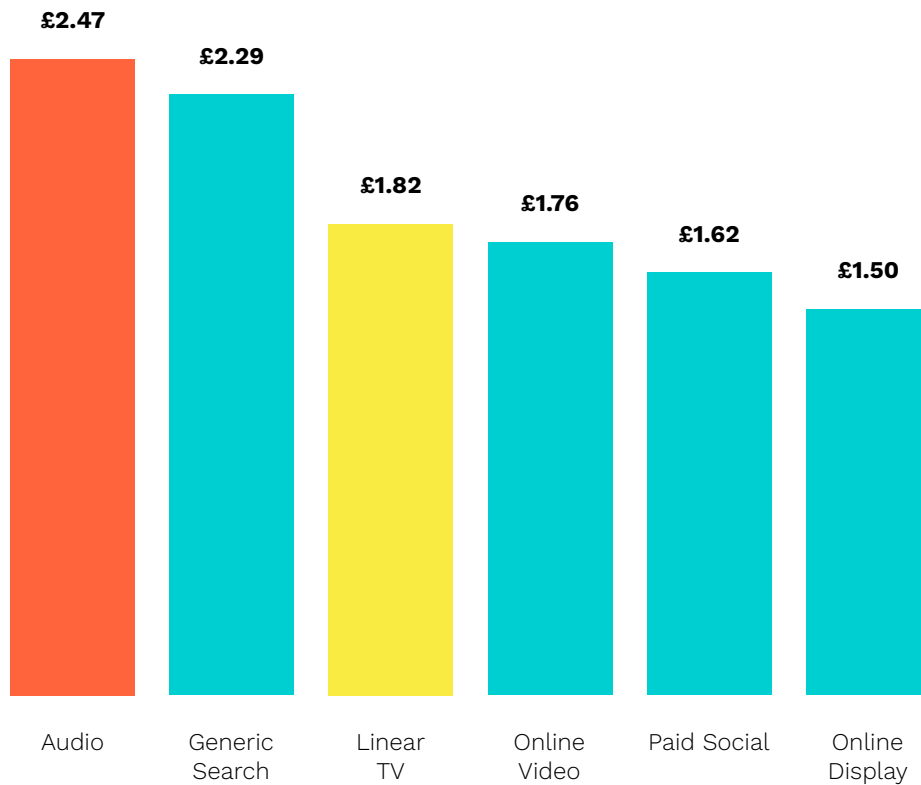
Analysis of over 800 radio campaigns measured on Radiogauge reveals how, on average, radio advertising increases brand consideration by 18% and encourages around 20% of those recalling the ad to search for and/or access - the brand's website.



### **b. Delivering strong short-term return on investment (ROI)**

Underlining the above learning, data from Thinkbox's Profit Ability 2 study reveals how short-term ROI derived from audio significantly outperforms that of pureplay digital channels.

**Figure 16: Short-term profit ROI by channel**



**Source:** Thinkbox Profit Ability 2 - Ebiquity, Essence Mediacom, Gain Theory, Mindshare, Wavemaker, April 2024

For marketers with a focus on *performance* metrics, Radiocentre’s recent *Radio: The Performance Multiplier* study reveals how audio advertising boosts web sessions twice as cost-efficiently as other ‘demand-generation’ media. In addition, the study reveals how increasing audio’s share of total media spend enhances overall campaign performance at no extra cost:

- boosting Organic Search volumes.
- increasing Paid Search impressions with improved conversion to referrals.
- uplifting response to Paid Social ads.

## B2. How digital audio amplifies Demand Conversion



### 1. Target in-market audiences and/or specific locations

Digital audio enables advanced targeting based on behavioural and in-market data such as location, interests, and habits, offering more efficient targeting of in-market audiences and precise location-based targeting. Commercial broadcasters have invested heavily in first-party data and partnerships with second and third-party vendors, giving advertisers access to a vast amount of listener data and a wide range of targeting options via their digital platforms. Advertisers can focus digital audio campaigns on demographic, interest and intent as well as contextual targeting, to reach specific in-market consumers (e.g. Auto Intenders or Finance Intenders).

### 2. Enhance relevance of call-to-action (CTA)

Dynamic creative in digital audio allows advertisers to deliver highly relevant calls-to-action based on the listener's proximity to a point of purchase or their specific context. By using real-time data, ads can be customised to reflect the listener's current situation, whether they're near a store or engaged in an activity that makes them more receptive to making a purchase. This level of personalisation enhances the impact of the message, increasing the likelihood of conversion by presenting the right offer at the right moment.

### 3. Optimise campaigns with real-time measurement

Digital audio allows for real-time campaign measurement and optimisation by providing immediate feedback on listener engagement and behaviour. This enables advertisers to adjust their campaigns while they are still live, for example by amending creative or updating targeting parameters, in order to maximise effectiveness.

### In a nutshell

The core benefit of digital audio for Demand Conversion activity is that it combines the cut-through and emotional influence of audio advertising with the targeting efficiencies of digital media. These benefits are significant and accessible to advertisers of all kinds. The purpose of this section of the report is to summarise these benefits and the role they can play as part of an audio advertising strategy. More information on specific features and techniques used to deliver these benefits is available directly from broadcasters. See [here](#) for how to get in touch.

# SECTION 3

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## Putting the learning into practice

### Getting the most from your multi-platform audio campaign

#### In this section:

##### a. *Best practice: effective audio campaign planning*

- Allocating media budget to audio
- The primacy of weekly reach
- Implications for multi-platform audio campaign planning

##### b. *Best practice: effective audio creativity*

- Harness the power of creative consistency
- Exploit new opportunities to boost creative engagement
- Implications for multi-platform audio creative development

##### c. *Digital audio advertising formats and buying processes*

##### d. *Monitoring digital audio outputs and outcomes*





## Best practice

Our overview of best practice that follows is derived from studying the effects of almost 2,000 individual audio campaigns, featuring a mix of broadcast radio activity, sometimes paired with digital audio. As audio advertising faces the same challenges irrespective of the platform on which it is heard, the learnings detailed here are broadly applicable across all audio formats.

The key difference between audio services, though, can be found in the audience reach they provide. In this context, our best practice for audio campaign planning is heavily influenced by the high reach potential that radio can supply to advertisers - and the proven effects this delivers. With linear radio still accounting for most commercial listening in terms of reach and share, the summary below remains entirely relevant in helping guide advertisers in attaining the best results from their overall investment in commercial audio.

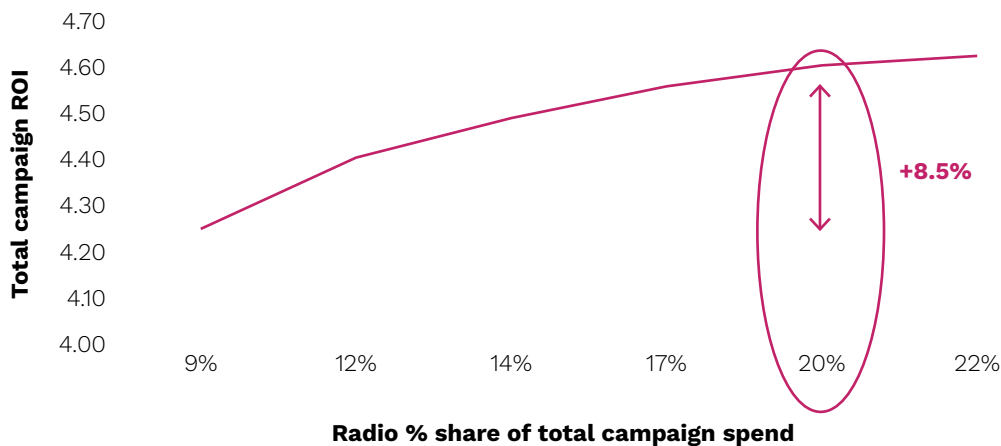
### a. Best practice: effective audio campaign planning

#### 1. Allocate 20%+ of the overall media budget to audio

With a significant bank of evidence across a wide range of metrics highlighting the powerful influence that audio (and radio in particular) can exert on behalf of advertisers, combined with a large and growing audience, it makes sense for advertisers to reconsider the share of budget they currently allocate to audio media. Radiocentre's *ROI Multiplier* identified how raising radio's share of an advertising budget to 20% leads to a significant increase in overall campaign ROI (see below).

Interestingly, this also correlates broadly with audio's share of consumer time spent with content media<sup>3</sup>.

**Figure 17: Reallocating budget to radio from other media improves total campaign ROI**

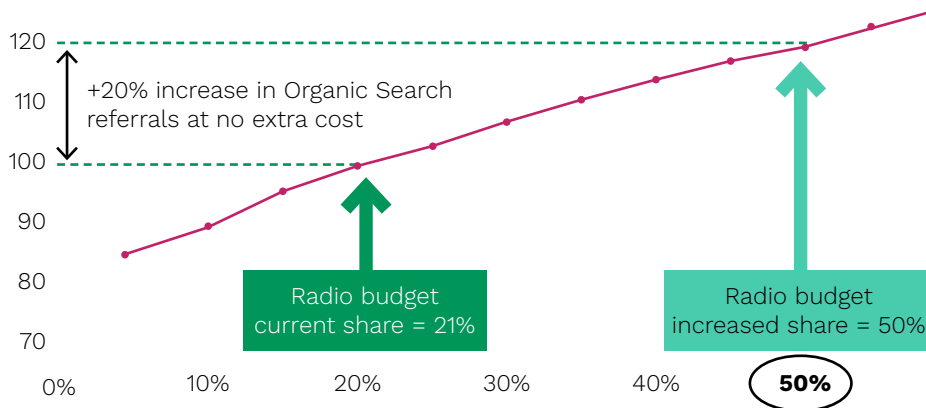


**Source:** 'Radio: the ROI Multiplier' from Radiocentre with Holmes & Cook  
**Base:** 132 cases with overall campaign ROI data

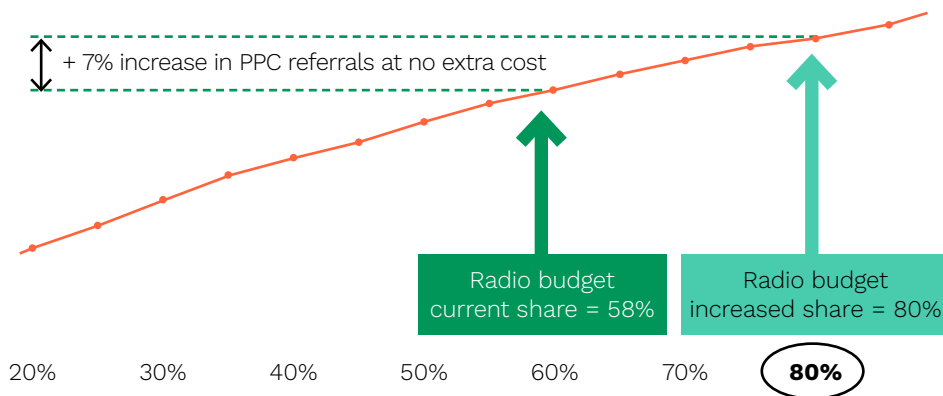
This learning has been underpinned by Radiocentre's *Radio: The Performance Multiplier* study which highlights how increasing radio's share of total campaign spend (by reallocating existing budgets from other media) enhances overall campaign performance at no extra cost. The case studies reveal that audio advertising continues to improve campaign effects even when allocated a 50%+ share of total media spend.

**Figure 18: Allocating greater share of budget to audio boosts response to pureplay performance channels**

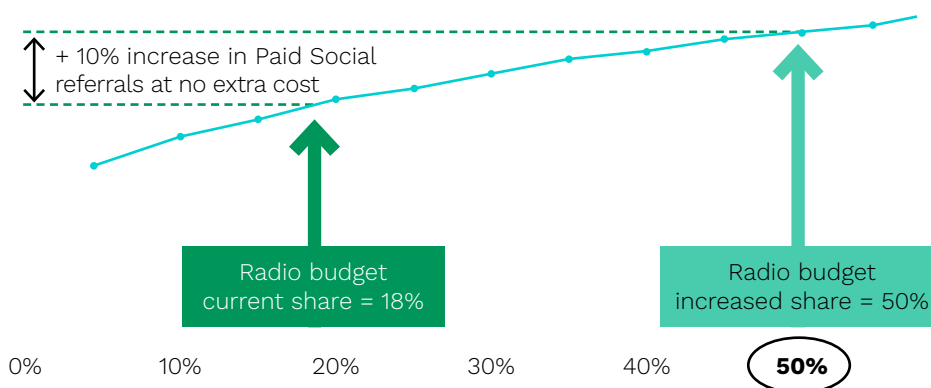
**Organic Search**



**Paid Search**



**Paid Social**



Once the media budget allocation has been set for audio in total, the precise budget split between broadcast and digital audio will be heavily influenced by the individual campaign objectives/target audience - and should be set, taking these factors into consideration, at the point of campaign planning.

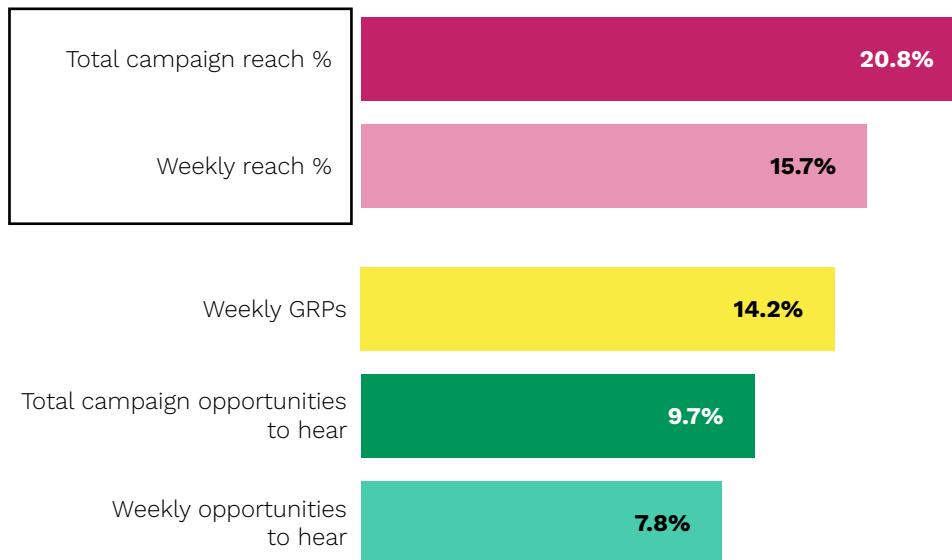
## 2. Use multi-platform audio formats in combination to maximise weekly reach

Broadcast radio and digital audio services play complementary roles for the listener - they can also do so for advertisers, especially in terms of optimising campaign reach.

a. For advertisers using audio to **generate future demand**, weekly reach is proven to be the most influential factor in driving awareness.

**Figure 19: The effect of media planning factors**

Ad awareness uplift rate (top 2 vs. bottom 2 quartiles)

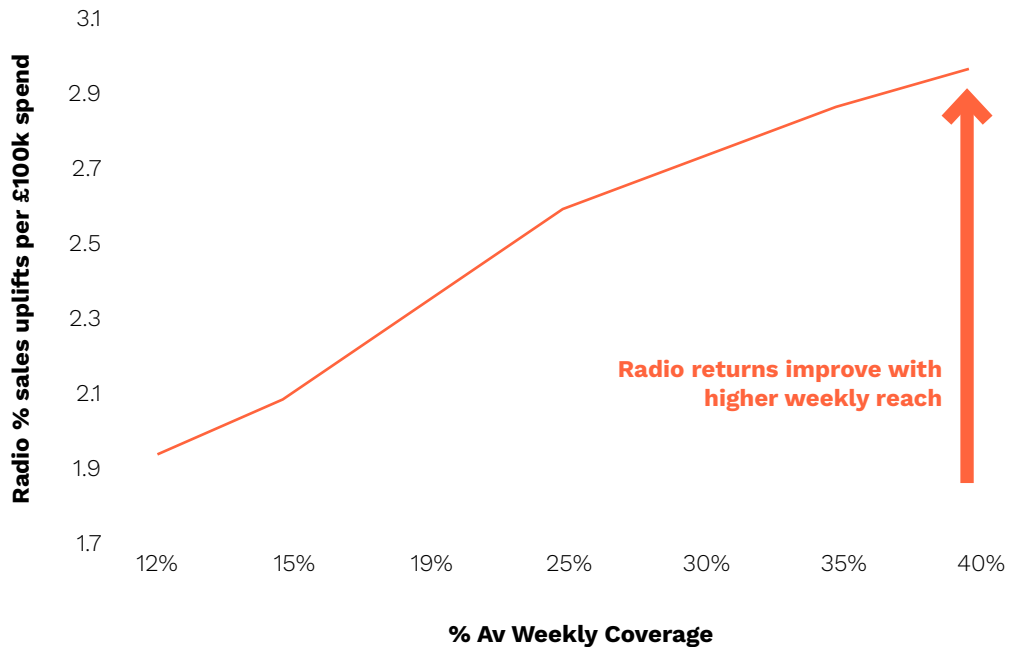


**Source:** Big Audio Datamine **Base:** Ad awareness uplift rate (top 2 vs. bottom two quartiles)

**Implication for multi-platform audio campaign planning:** Use *digital audio* formats alongside *broadcast radio* to maximise campaign reach for *Demand Generation* activity, especially among younger, more upmarket, audiences.

b. Weekly reach is also demonstrated to play a primary role in driving effectiveness of audio campaigns for advertisers seeking to **convert current demand**.

**Figure 20: Weekly coverage - effect on radio sales uplifts**



**Source:** Radio: The ROI Multiplier

In addition to its strong correlation with increasing sales (see above chart), Radiocentre's *Radio: The Performance Multiplier* study reveals the role of reach in optimising performance metrics e.g. average weekly reach of the best-performing campaigns was c. 50% higher than below-average performers. (See also: **Radio Planning Optimiser** for guidance on establishing effective audio campaign reach.)

**Implication for multi-platform audio campaign planning:** Use digital audio to enhance targeting efficiencies for *Demand Conversion* activity – e.g. *in-market* audiences – alongside the activation-at-scale provided by *broadcast radio's* wide reach.

## b. Best practice: effective audio creativity

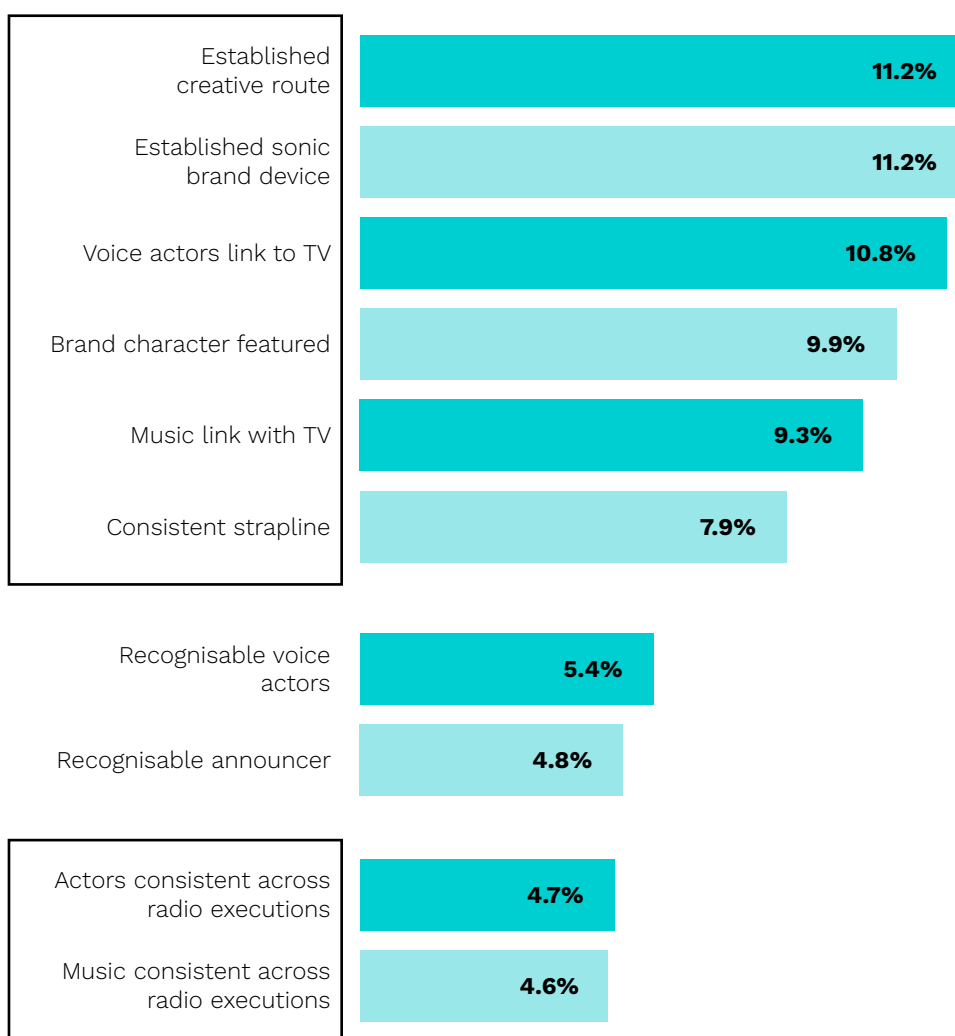
### 1. Harness the power of creative consistency

Campaigns that feature distinctive audio elements strongly associated with the brand – such as music, voices, straplines, brand characters, a sonic brand device – and use them consistently within different radio executions and across media (where relevant) - achieve greater effects.

a. For advertisers using audio to **generate future demand**, consistency is proven to be the most influential audio creative factor in driving awareness and, crucially, also plays a vital role in building brand trust.

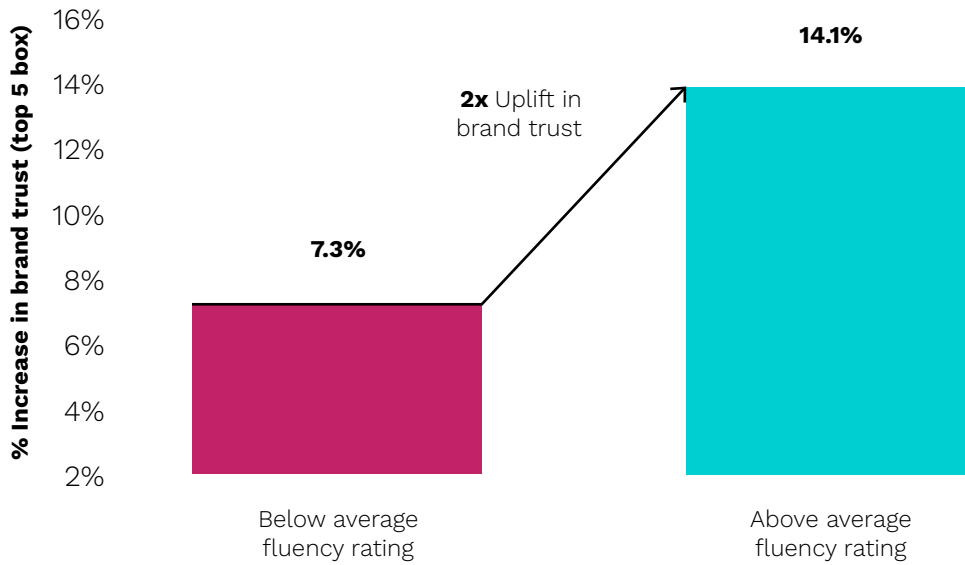
**Figure 21: The top 10 creative attributes**

Ad awareness uplift rate (ads using attribute vs. those not using)



**Source:** Big Audio Datamine **Base:** Ad awareness uplift rate (ads using attributes vs. those not using)

**Figure 22: Radio ads with high brand recognition cause large increases in brand trust gains** % increase in brand trust (top 5 box)

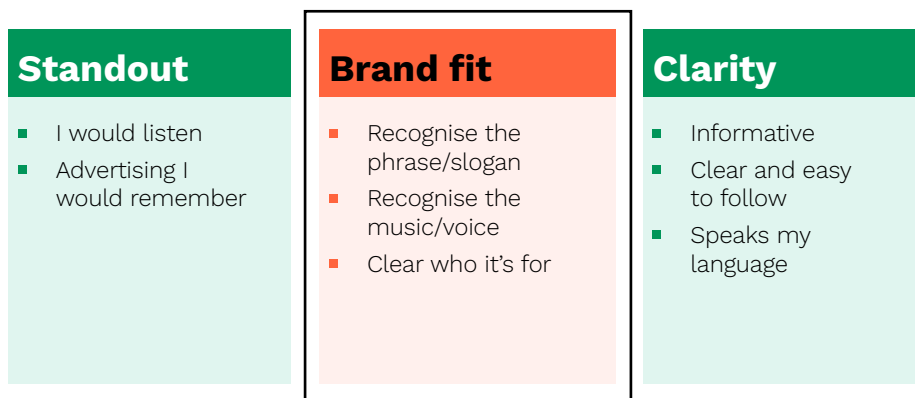


Radio ads with higher brand recognition build trust more effectively  
**Source:** Listen Up!

b. Creative consistency is also demonstrated to play a significant role in driving effectiveness of audio campaigns for advertisers seeking to **convert current demand**.

Beyond measures such as awareness and trust, creative integration is also vital in delivering significant improvements in campaign ROI, as demonstrated in the chart below (from *Radio: The ROI Multiplier*) revealing the common creative factors across the campaigns that delivered the highest ROI.

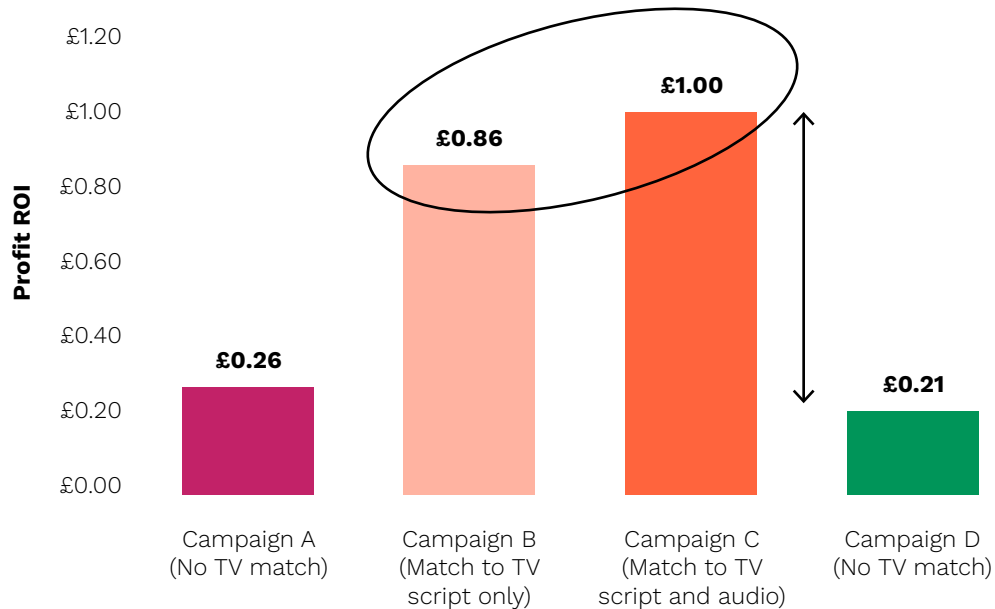
**Figure 23: Best practice radio creativity**



**Source:** Radio ROI Dataset **Base:** Meta-regression Analysis, Radio Sales Uplifts, 27 cases

The link between audio creative consistency and improved ROI performance is further reinforced by the chart below from the Ebiquity data contained in *Profit-driving Radio*.

**Figure 24: Creative synergy boosts Radio ROI performance by up to 400%**



**FMCG case study. Product-led brand campaign**

**Source:** Profit Driving Radio, Radiocentre/Ebiquity

In addition to its powerful effect in boosting ROI, *Radio: The Performance Multiplier* highlights the value of audio creative consistency in optimising performance metrics - revealing that the best-performing campaigns harnessed audio brand assets twice as effectively as the below-average performers.

**Implication for multi-platform audio creative development:** Develop and leverage consistent audio brand assets across platforms and campaigns to optimise audio effects (both short- and longer-term) and to provide a solid platform from which to amplify the additive effects of dynamic audio creative.



## 2. Exploit new opportunities to boost creative engagement

New developments in recording techniques and smart speaker technology provide further opportunities to enhance creative engagement and generate more immediate responses to audio advertising.

### 3D audio ads

3D audio ads, or binaural audio ads, are ads produced using binaural recording techniques to create an immersive, three-dimensional sound experience when listened to with headphones.

By capturing sound the way human ears naturally hear it, these ads make audio elements appear to move around the listener - from front to back, side to side, and above or below - creating a realistic and engaging auditory environment.

### Interactive voice ads

Interactive audio encourages listener participation through voice-activated prompts.

This allows users to request more information, redeem offers, or take action directly from the ad.

By integrating voice commands with smart speakers or mobile voice assistants, listeners can perform instant actions like adding items to their shopping cart or setting reminders for future purchases.

### *Dynamic creative*

Advertisers can improve relevance and strengthen the listener's connection to brand and its message by pairing data-driven targeting with dynamic creative to tailor messaging based on time of day, the audience's location, interests, and/or context. Using dynamic audio and the personalised nature of the ad can increase message clarity by 20% and intent to purchase by 24%<sup>4</sup>.

## c. Digital audio advertising formats and buying processes

### 1. Formats

UK commercial broadcasters operate across multiple audio categories, providing a wide variety of audio content/environments for advertisers to tap into. From linear radio delivered via IP to podcasts and other digital audio content including music streaming partners, each channel offers a range of advertising formats for advertisers to leverage.

#### Digital radio ads

Digital versions of traditional radio stations, like those offered by Global (Heart, Capital) and Bauer (Kiss, Magic), stream online and allow advertisers to reach specific live radio audiences via digital channels.

**Pre-roll ads:** Short audio ads that play before streaming content begins on websites or apps.

**Mid-roll ads:** Ads inserted during breaks in the streaming content.

**Post-roll ads:** Ads that play after the streaming content concludes.

#### Podcast ads

Ad inventory available across a) podcasts owned/produced by the broadcaster and b) podcasts represented (for sales purposes) across owned/operated platforms.

**Host-read ads:** Endorsements or promotional messages read by the podcast host, often seamlessly integrated into the content.

**Produced spots:** Pre-recorded ads inserted into podcast episodes (pre-roll, mid-roll, post-roll).

**Sponsorships:** Aligning a brand with a specific podcast series or episode.

**Branded podcasts:** Entire podcasts created or sponsored by brands to engage audiences in a more immersive content experience.

#### In-game audio ads

Ads integrated into the audio experience of video games. These ads are dynamic audio spots, streamed into the game during natural pauses, loading screens, or menu navigation, delivered within games played on mobile devices. UK commercial radio broadcasters may offer in-game audio ads through partnerships or ad networks. Features include:

**Contextual integration:** Ads that align with the game's environment or storyline.

**Targeted advertising:** Ability to target ads based on player demographics, location, or in-game behaviour.

**Source:** MTM analysis, qualitative interview

## **2. Buying processes**

There are two main buying processes through which the digital audio formats listed above can be accessed:

### ***i. Direct***

This involves advertisers purchasing digital audio advertising inventory directly from commercial broadcasters within their network of owned and operated digital audio properties. The additional benefit of this approach is that broadcast radio can also be integrated within the deal, ensuring the most cohesive cross-platform audio solution to deliver against the advertiser's specific goals.

### ***ii. Programmatic***

Programmatic buying automates the ad purchasing process through real-time bidding (RTB) across programmatic platforms like DAX (owned by Global) or AudioXi (owned by Bauer) and demand-side platforms (DSPs). This method uses data and technology to match ads with target audiences dynamically, optimising delivery and efficiency.

## **d. Monitoring digital audio outputs and outcomes**

### **1. Campaign delivery (outputs)**

Total impressions, gross rating points (GRPs), audience reach and frequency, are traditional metrics for monitoring an audio campaign's exposure in terms of audience delivery compared to plan.

Digital audio can supplement these metrics with detailed ad placement reports, providing insight on where and when ads were played across platforms, devices and content. This combined approach gives advertisers even more data on the distribution of their ads so they can optimise targeting and performance.

## **2. Campaign effectiveness (outcomes)**

Research studies/tools demonstrate a strong relationship between campaign delivery outputs and advertising outcomes (awareness, performance, ROI):

- *Radio Planning Optimiser* (impact of weekly reach and total GRPs on awareness)
- *Radio: The Performance Multiplier* (impact of daily audio impressions on daily web sessions)
- *Radio: The ROI Multiplier* (impact of weekly reach on radio ROI)

These also suggest that advertisers should adopt a range of approaches in order to measure the full impact of (outcomes from) their digital audio campaign, e.g:

### **a. Brand lift studies**

Brand lift studies, a common audio measurement tool, use pre-and post-campaign surveys (and/or using matched exposed vs. non-exposed respondents) to assess an audio campaign's effect on measures such as awareness, consideration, favourability, and purchase intent.

These studies provide valuable data on how the campaign has affected consumer perceptions and attitudes, and offer insights into the campaign elements that deliver the most positive effects.

Brand lift studies can help demonstrate accountability and justify ad spend by linking investment to positive outcomes such as improvements in key brand metrics.

### **b. Attribution tracking**

Attribution tracking uses technology to monitor how a listener's exposure to an ad leads to specific actions, such as visiting a website or making a purchase. It then assigns credit to different marketing channels, helping advertisers understand which channels are most effective in driving conversions. By using various approaches like first-click and last-click to categorise actions, attribution tracking provides valuable insights into the consumer journey and helps advertisers assess ROI.

In this context, major UK commercial broadcasters such as Global and Bauer have invested into digital audio measurement tools that mean advertisers can track the onward journey of a listener after they have been exposed to a digital audio ad. These tools allow advertisers to optimise audio campaign planning specifically around driving demand. In some cases, this can be monitored by audience, ad content, and device via which the ad is heard. Ultimately, these innovations aim to bring audio advertising closer to the point of conversion, helping to "close the loop" between ad exposure and actual conversions. In this way, digital audio advertisers are able to assess audio campaign effectiveness in line with other digital media.

### **c. Mixed media and econometric modelling**

Advertisers today increasingly use multi-touch attribution and media mix models (MMM) to evaluate the combined impact of all channels on campaign performance. These more sophisticated forms of measurement are helping advertisers overcome attribution challenges to highlight how digital audio contributes to overall campaign results, including boosting other channels like organic search queries.

Advertisers can also leverage digital audio's detailed delivery data for econometric analysis, a statistical method that quantifies advertising's impact on sales and business metrics over time. While econometric analysis can provide valuable insight into the impact of different channels on sales both short and longer-term, it can struggle to identify the effect of individual channels if they are allocated only a small share of overall media expenditure/planned at low levels of reach. In this context, advertisers should avoid relying solely on MMM for lower weight digital audio campaigns.

# SECTION 4

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## Commercial broadcaster plans to drive digital audio innovation

UK commercial broadcasters have recently launched or are currently developing new initiatives to extend and elevate their audio offering and its value for listeners and advertisers:

### a. Emerging audio formats for advertisers

#### **In-game audio advertising**

In-game advertising is a major opportunity for advertisers worldwide, with the sector projected to grow at a compound annual rate of 9.1% from 2024 to 2029. To meet players' demand for uninterrupted gameplay, advertisers are increasingly using non-intrusive in-game audio to deliver seamless, contextual messages. As the gaming industry continues to thrive, audio ads offer a unique way to target players based on demographics and behaviours, align with popular games, and measure campaign success through advanced analytics. This suggests audio will be a big beneficiary of in-game advertising's growth.

#### **Shoppable audio ads**

Shoppable audio ads are an emerging trend that turns passive listening into interactive shopping experiences, allowing listeners to make purchases directly from audio content.

Using voice-activated technology, listeners can engage with ads through voice commands, while clickable companion banners in apps provide a way to shop or learn more. This approach offers advertisers immediate conversion opportunities, enhances engagement, and provides valuable consumer data.

#### **Extending the podcast footprint using visual assets and events**

The traditional view of podcasts as purely audio-based is evolving, with many increasingly incorporating video, social media interactions, and live events into their offerings. Many podcast producers and content owners now actively consider the role of visual assets and experiential in developing their creative and commercial offering<sup>5</sup>.

## b. AI-powered schemes to bolster digital audio advertising effectiveness

Artificial intelligence (AI) is playing an increasingly influential role in shaping the future of digital audio advertising. AI technologies offer powerful tools for audio advertisers in terms of enhancing audience targeting, personalising content, and improving measurement capabilities, for example:

**Enhanced targeting:** AI can enhance audio ad targeting by using sentiment analysis to match ads with the mood and context of content, boosting engagement and improving the listener experience. For podcasts, machine learning is used to analyse content and segment it into conversation topics. AI is also used to continuously model audiences for targeting based on a series of listening behavioural signals.

**Generating audio creative:** With AI-powered text-to-voice tools, advertisers can generate ad scripts, voices and soundscapes, saving time and resources.

**Dynamic creative optimisation:** AI enables real-time customisation of ad content based on data like demographics, behaviour, location, and listening habits.

**Campaign research and analysis:** AI streamlines data-processing, identifying trends, preferences, and opportunities; automating analysis to enable faster, more effective campaign decisions.

**AI-powered chatbots in brand lift studies:** AI-powered chatbots can provide deeper insights by engaging users in interactive dialogues after ad exposure, collecting valuable feedback on brand perception and ad effectiveness. This scalable approach allows for large-scale studies, gathering rich data without the limitations of traditional surveys.

# SECTION 5

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## Resources and next steps

### a. Additional resources

**J-ET audio trading system:** A centralised platform provided by Adwanted UK that streamlines the buying and selling of audio advertising inventory, making the process more efficient for both advertisers and media owners.

**Audiotrack distribution service:** A dedicated audio distribution service from Adwanted powered by J-ET. Audiotrack simplifies copy administration and audio distribution for advertising, ensuring seamless delivery of audio ads across all channels.

**AudioLab:** A reporting platform from Adwanted that tracks real-time ad impressions across multiple digital audio providers in a single campaign dashboard.

#### Radiocentre resources

Radiocentre offers expert guidance on digital audio, with ample research on its effectiveness and tools for campaign creation, planning, and analysis. Media and creative professionals can also benefit from their interactive **training courses and workshops**, open to anyone in the industry.

#### Planning resources at a glance:

- **Audio need-states navigator:** A tool designed to help advertisers plan audio campaigns more effectively by aligning with audience needs.
- **Radio planning optimiser:** Provides radio planners and buyers with a data-driven framework, enabling them to make smarter, outcome-focused decisions when determining the ideal planning weights for their radio campaigns.
- **Cover Curves generator:** A tool that enables advertisers to set headline planning weights based on a reach target or estimate campaign coverage using existing planning weights.
- **Media attribute mapper:** A tool that enables advertisers to compare the overall performance of two different media against a range of attributes for brand building campaigns.
- **Context targeter:** A behavioural planning tool that enables advertisers to identify the best media for reaching audiences throughout the day during activities relevant to their campaign.
- **Station mapper:** Shows which radio stations cover specific regions, cities or towns in the UK.



### Effectiveness resources at a glance:

- **Radiogauge**: Free service which provides advertisers with data to help them understand the effectiveness of their radio campaign, benchmarked against sector averages.
- **Radiogauge predict**: provides an indication of the likely effects from radio advertising based on specific campaigns characteristics, sourced from aggregated data across 1000+ radio campaigns.
- **Campaign ROI calculator**: A calculator that enables advertisers to estimate the ROI of a planned campaign based on brand attributes and how budgets are allocated across media.
- **Case study finder**: Enables advertisers to search for case studies most relevant to their brief - explore by sector, objective, campaign format, and consumer context.

### Creative resources at a glance:

- Case studies/examples of best-in-class radio ads.
- **Brand music navigator**: Explores the meaning and effectiveness of music for brands based on semiotic analysis.
- **Radio ads database**: Database of over 25,000 radio ads searchable by brand, sector and year.
- **Listen Up!**: Actionable learning (based on deep-dive analysis of 131 radio campaigns) designed to help advertisers creating audio ads that emotionally resonate with audiences and achieve better long- and short-term results for brands.

## b. Where next?

### DAX – Global’s digital advertising exchange

Contact DAX:

Web: [\*\*global.com/dax/audio\*\*](http://global.com/dax/audio)

Email: [\*\*Info@thisisdax.com\*\*](mailto:Info@thisisdax.com)

### Bauer Media Group

Contact Bauer Media:

Web: [\*\*bauermedia.co.uk\*\*](http://bauermedia.co.uk)

Email: [\*\*advertising@bauermedia.co.uk\*\*](mailto:advertising@bauermedia.co.uk)

### Other commercial broadcasters

Web: [\*\*radiocentre.org/members/members-list\*\*](http://radiocentre.org/members/members-list)

## Glossary of terms

**Audio branding:** The use of specific sounds, music, or audio elements to create a recognisable identity for a brand.

**Branded podcasts:** Podcasts produced by a brand to promote its products or services indirectly.

**CPM or CPT:** The cost of serving an ad to 1,000 listeners. CPM/CPT is a standard metric used in digital audio advertising to measure the cost-effectiveness of an ad campaign.

**GRP:** Gross rating points quantify impressions as a percentage of a target audience, multiplied by the frequency of the audience hearing the ad.

**Host-read ads:** Ads that are read by the host of a podcast or radio show.

**Impressions:** A measure of gross audience exposure, impressions are a common metric used to measure the reach of an ad campaign.

**Interactive voice ads:** Audio ads designed to engage with listeners through voice commands, often used with smart speakers. Listeners can respond to these ads by speaking directly to their device.

**MIDAS (Measurement of Internet Delivered Audio Services):** A survey conducted by RAJAR that offers insights into how audiences consume audio content online, including streaming, podcasts, and other digital formats.

**Mid-roll ads:** Ads that are inserted during the middle of the content.

**Podcast networks:** Groups of podcasts managed under one brand or company that helps to monetise, distribute, and promote shows collectively.

**Post-roll ads:** Ads that play at the end of the content.

**Pre-roll ads:** Ads that play at the beginning of an audio stream or podcast episode.

**Programmatic audio advertising:** The automated buying and selling of audio ads using data and algorithms. This allows advertisers to bid on ad inventory in real-time, targeting specific audiences based on various data points.

**RAJAR (Radio Joint Audience Research):** The official body in charge of measuring radio audiences in the UK, providing industry-standard data on listening habits across all radio platforms.

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- Octave
- CommunicorpUK

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