

2023

audio summit

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google



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tim armstrong
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arn

australian digital audio revenue: market data release



ford ennals

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CRA
COMMERCIAL RADIO & AUDIO

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online advertising expenditure report

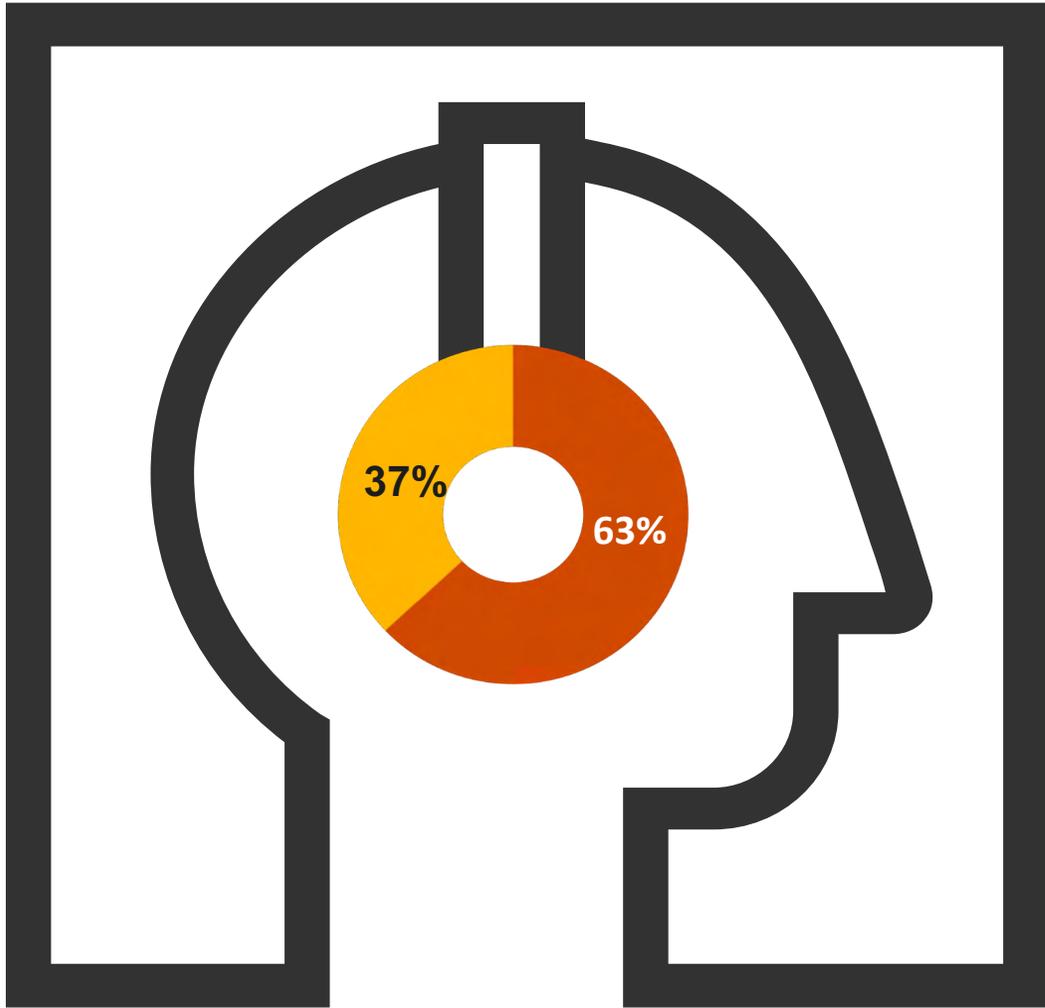
cy22 & december quarter | 2022



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background

[sli.do #audiosummitmelb23](https://sli.do/#audiosummitmelb23)



The total Australian online audio advertising market in CY22 was

\$221.2m

representing

4.0%

of total CY22 general display advertising expenditure

\$82.5m
Podcast advertising expenditure

\$138.7m
Streaming advertising expenditure



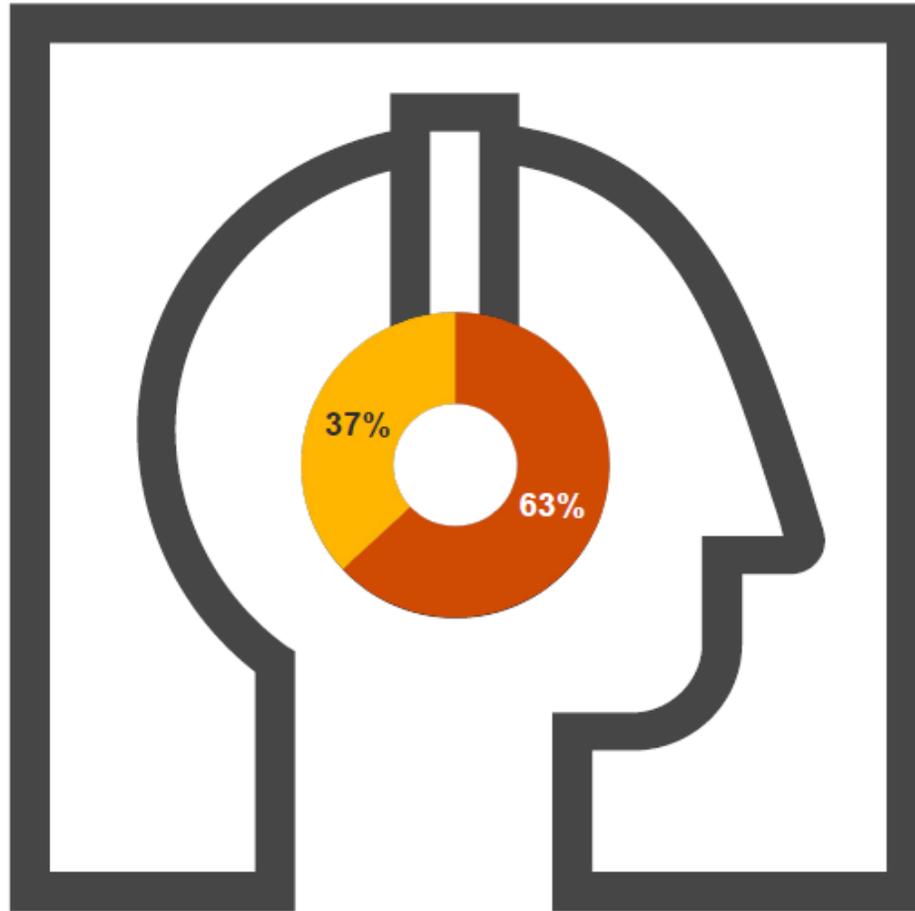


CRA
COMMERCIAL RADIO & AUDIO

**AUDIO
UNLIMITED**

F O R D E N N A L S
C E O C O M M E R C I A L R A D I O & A U D I O

DIGITAL AUDIO MARKET



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Podcast advertising expenditure

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Streaming advertising expenditure

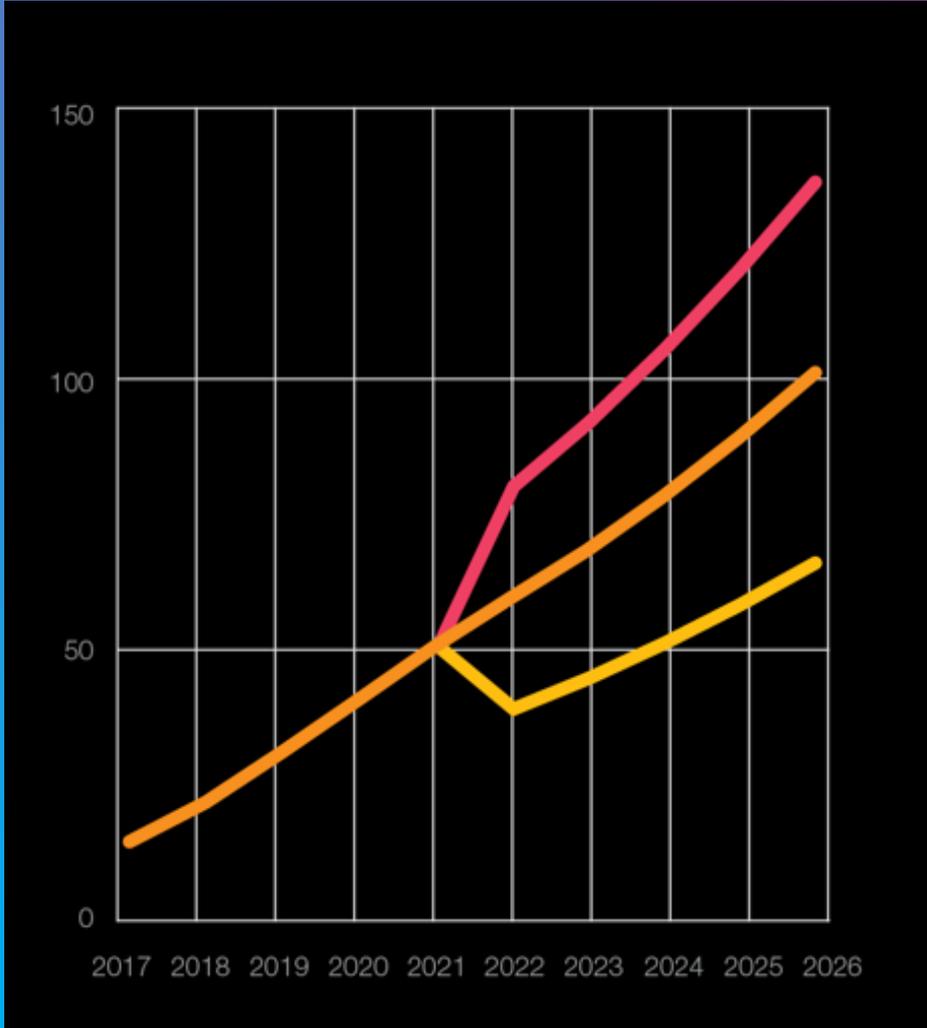
UK DIGITAL AUDIO GROWTH

Digital audio grows by 58%

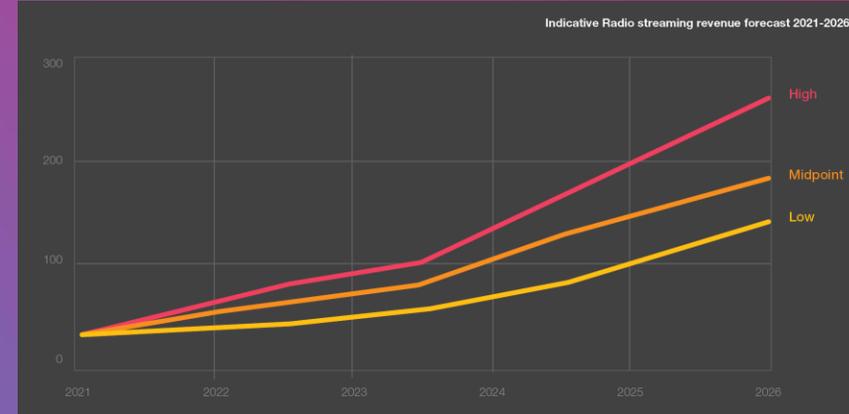




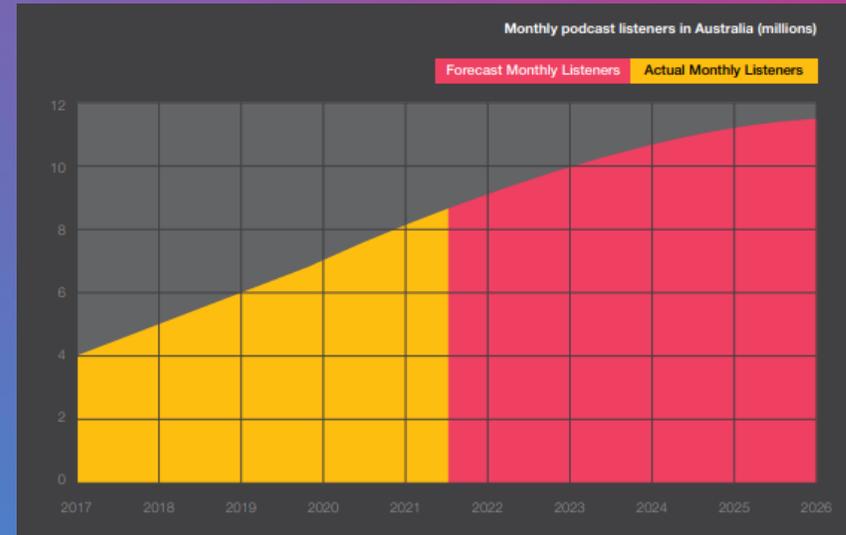
PWC PROJECTS STREAMING AND PODCAST REVENUE GROWTH



PODCAST GROWTH



RADIO STREAMING REVENUE GROWTH

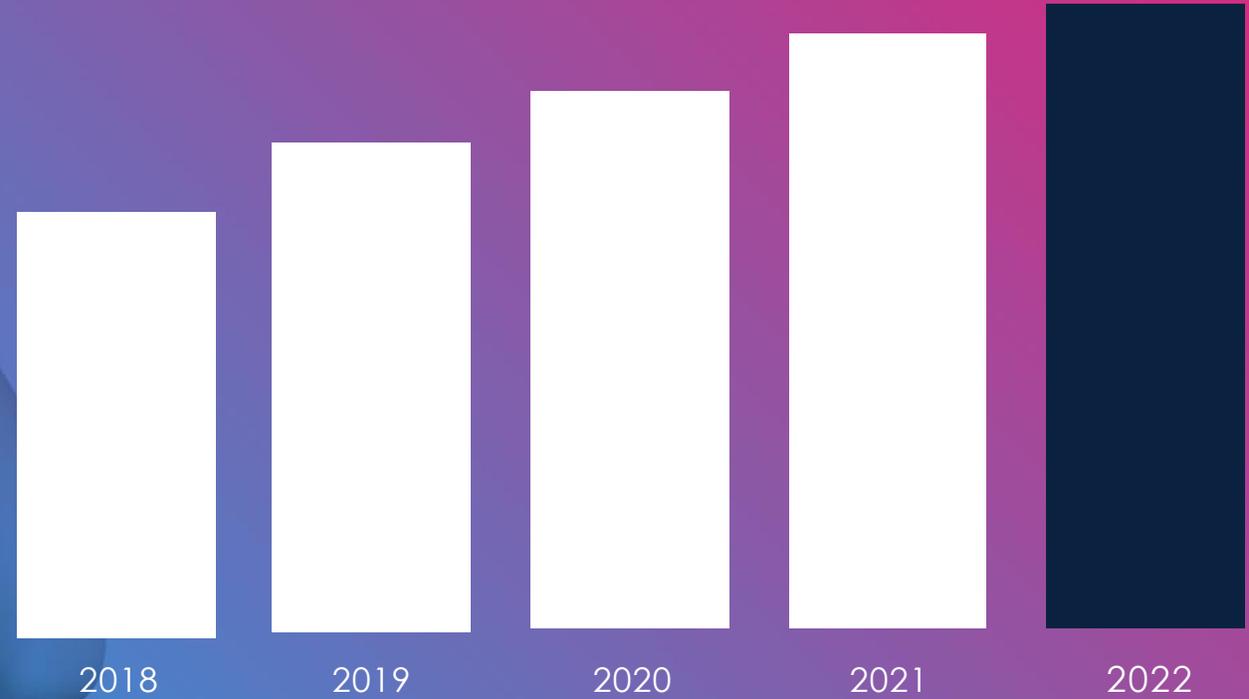


PODCAST REVENUE GROWTH

DIGITAL AUDIO LISTENING GROWTH

78% OF AUSTRALIANS LISTEN TO DIGITAL AUDIO EVERY MONTH

online audio = listening to am/fm/dab+ radio stations online and/or listening to audio content available only on the internet including podcasts and streaming services



PODCAST LISTENING GROWTH

40% OF AUSTRALIANS LISTEN TO A PODCAST EVERY MONTH



WHY IS DIGITAL AUDIO GROWING?



PODCASTS

NEW RADIO STATIONS

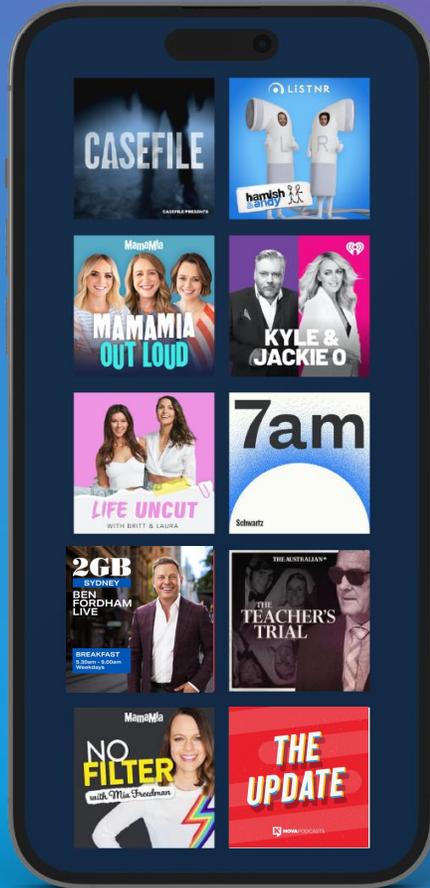
MUSIC STREAMING

CONTENT INNOVATION



AUSTRALIAN PODCAST GROWTH

AUSTRALIAN PODCAST RANKER 2022 INSIGHTS



755m

PODCAST DOWNLOADS
UP 39% COMPARED
TO LAST YEAR



THURSDAY

BIGGEST DAY OF THE WEEK



96%

OF PODCAST LISTENING
HAPPENS ON A MOBILE DEVICE
(SMARTPHONES AND TABLETS)



8am

TOP HOUR OF THE DAY
FOR LISTENING

AUSTRALIAN PODCAST RANKER : MOST POPULAR

MOST POPULAR PODCASTS BY AVERAGE MONTHLY LISTENERS

1.



Casefile

Audioboom

868,283 listeners

4.



The Kyle & Jackie O Show

ARN/iHeartMedia

465,836 listeners

2.



Hamish & Andy

LiSTNR (SCA)

856,311 listeners

5.



Life Uncut

ARN/iHeartMedia

453,304 listeners

3.



Mamamia Out Loud

Mamamia Podcast Network

562,289 listeners



Average listening
hours per week

2.46



Average downloads
per listener per week

4.3

AUSTRALIAN PODCAST RANKER : NEW PUBLISHERS

ABC



Shameless Media

MamaMia



The Squiz

WHY YOU SHOULD USE AUDIO?

AUDIO PLATFORMS IN YOUR MEDIA STRATEGY:
OFFER MORE CHOICE THAN EVER



COMMERCIAL
RADIO



DIGITAL RADIO
STREAMING



PODCASTS



FREE MUSIC
STREAMING





**RADIO
360°**

HYBRID MEASUREMENT SYSTEM



DIGITAL



DATA



WATCH

COMMERCIAL RADIO & AUDIO
THANK YOU



audio advertising state of the nation: **wave 7**

background

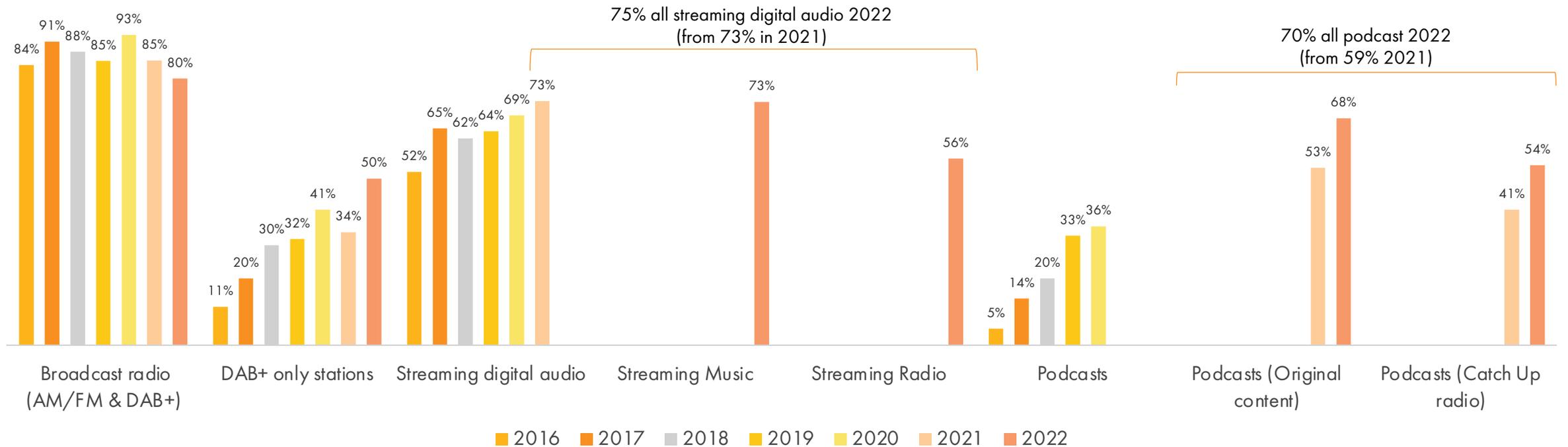


- This study was conducted by independent research company, Hoop Research Group
- Fieldwork was carried out in December 2022 and January 2023
- 249 survey responses were collected
- Respondents are decision makers or influencers in the allocation of marketing spend and either placed or planned audio advertising campaigns
- The analysis in this report focuses on the attitudes of decision makers from a range of media agencies
- This is the 7th wave of the IAB Audio Advertising State of the Nation which has been conducted at a similar time each year, full reports are available on the IAB website

The survey covers usage and attitudes to advertising in broadcast radio, streaming digital audio, DAB+ and podcasts.

7 in 10 agencies regularly consider audio advertising

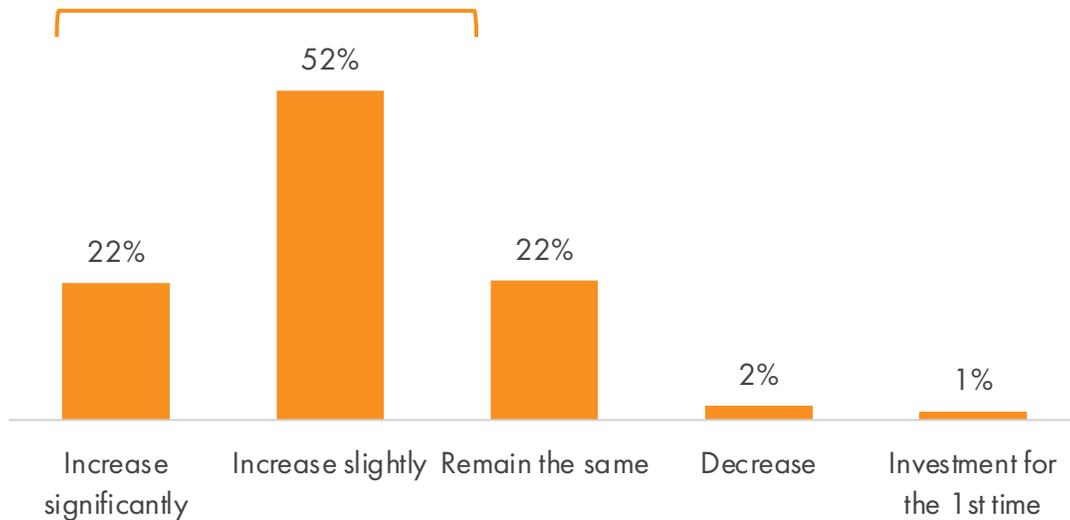
media agencies where audio is a significant or regular part of activity



audio investment plans for 2023

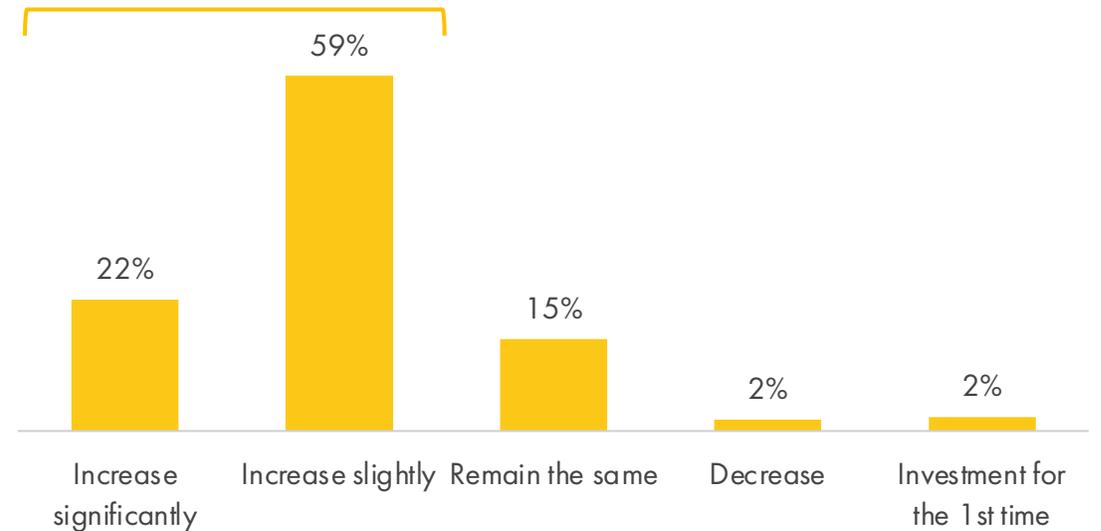
streaming audio

74% (71% of media agencies) intend to increase investment in streaming audio advertising in 2023.



podcast

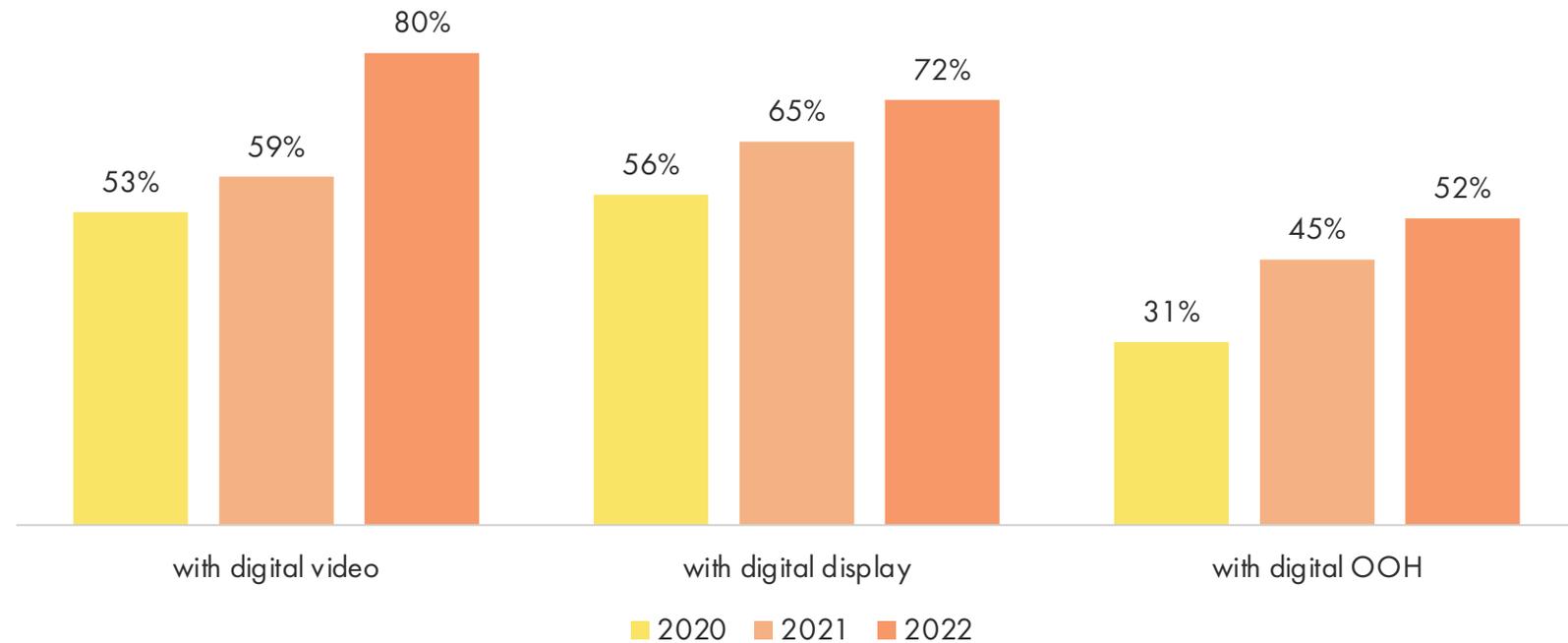
81% (78% of media agencies) intend to increase investment in podcast advertising in 2023.



increasingly agencies plan and buy in combination with other digital advertising

Buying digital audio advertising in combination with digital video advertising has increased significantly this year (from 59% to 80%).

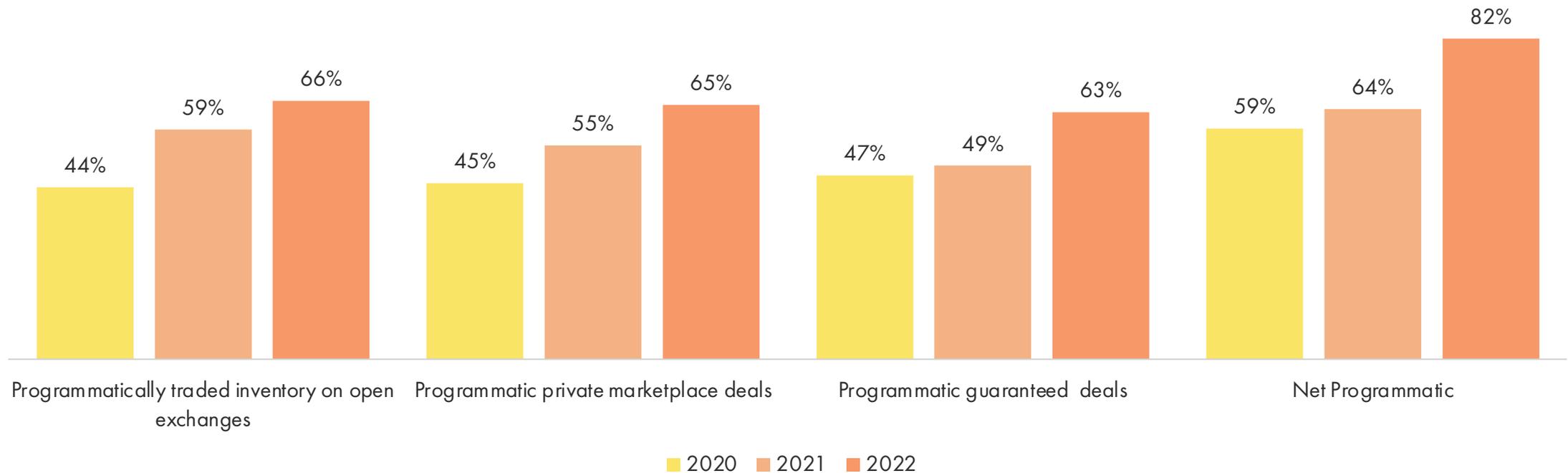
media agencies planning and buying digital audio with other digital advertising types



programmatic expected to increase again

8 in 10
intend to buy
programmatic

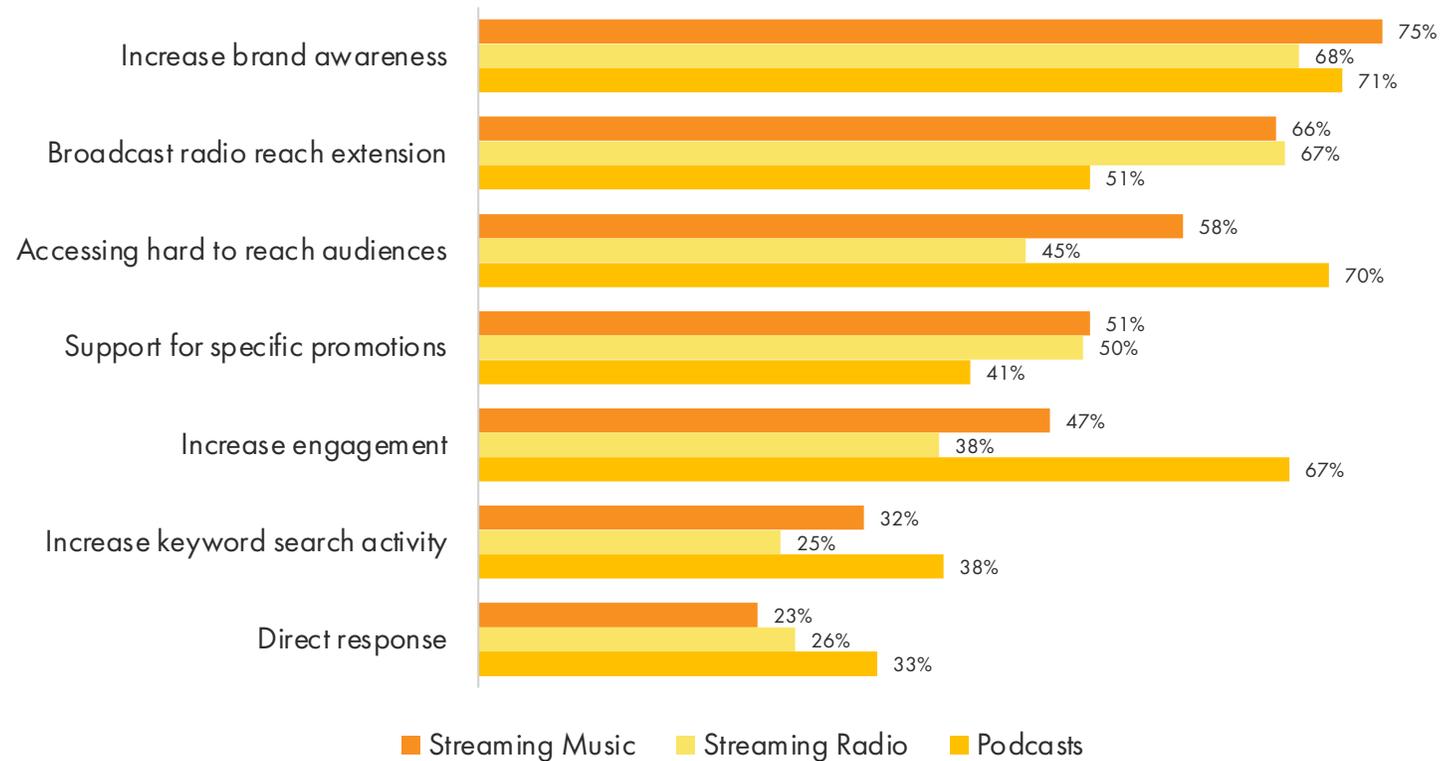
buying methods media agencies intend to use for audio advertising over the next 12 months



7 in 10 agencies say digital audio is effective for increasing brand awareness

Agency rating digital audio effectiveness for campaign objectives
top 2 box

Streaming music and radio also effective reach extension to broadcast radio.
Podcasts also effective for accessing hard to reach audiences and increasing engagement.

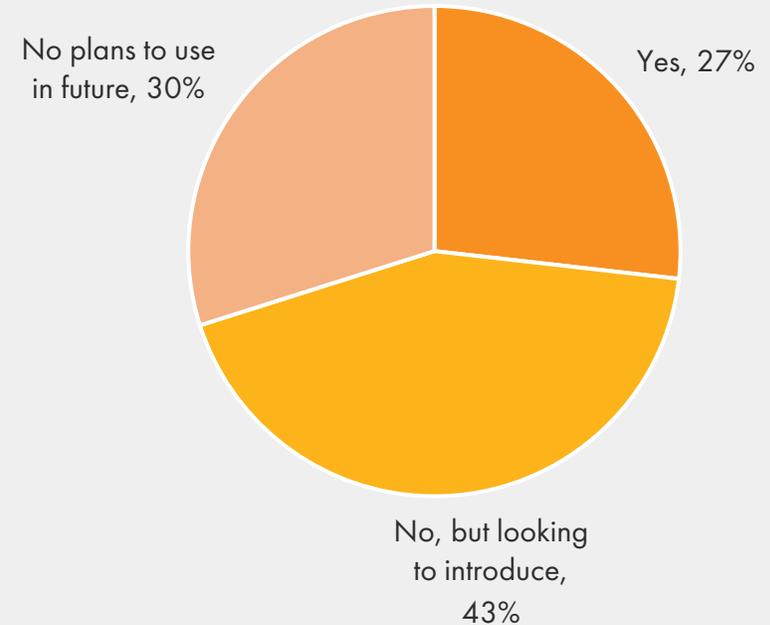


consistent usage of sonic branding

Brand building is the predominant objective for digital audio campaigns, however only 27% of agencies consistently using sonic branding.

Sonic branding

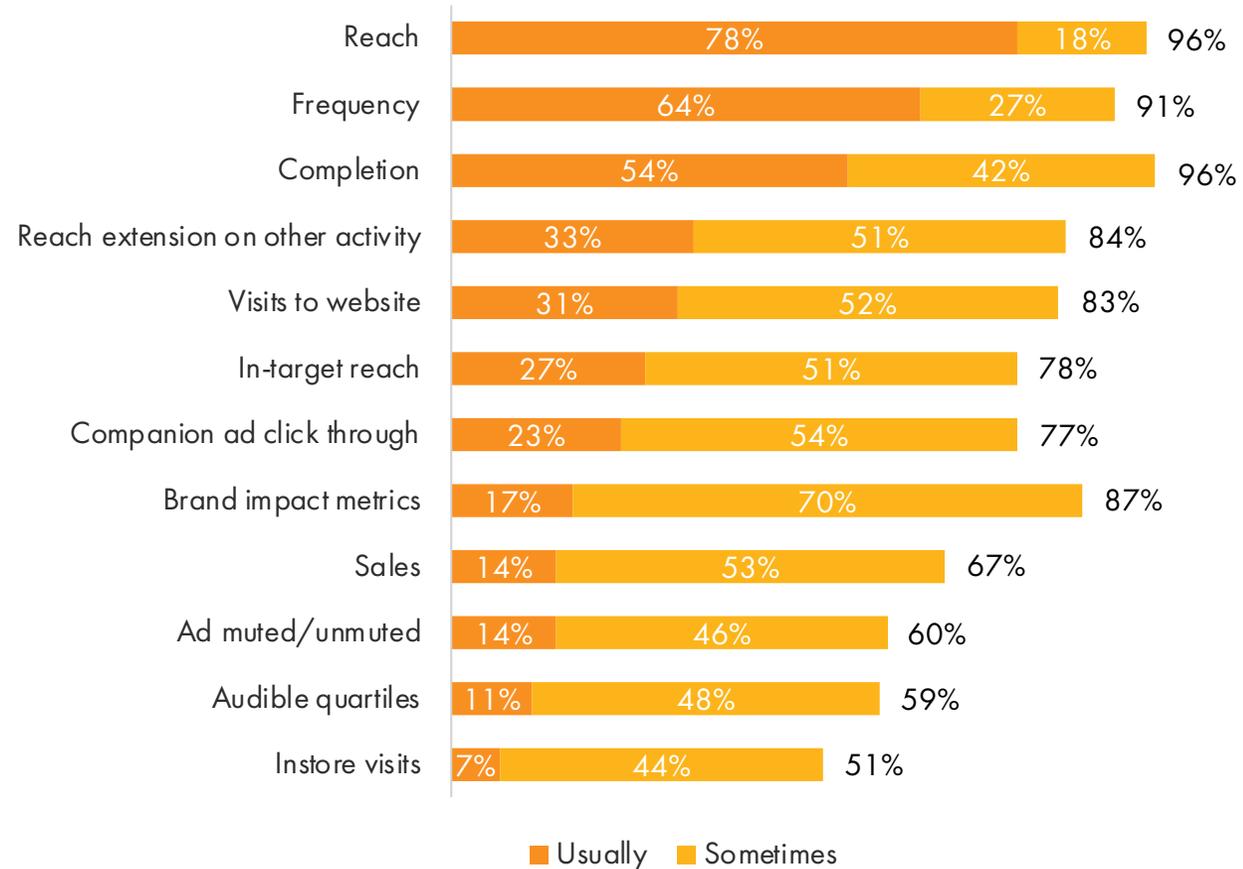
27% of agencies use sonic branding consistently. Intention to introduce consistent sonic branding is high at 43%.



assessment of advertising effectiveness for streaming digital audio



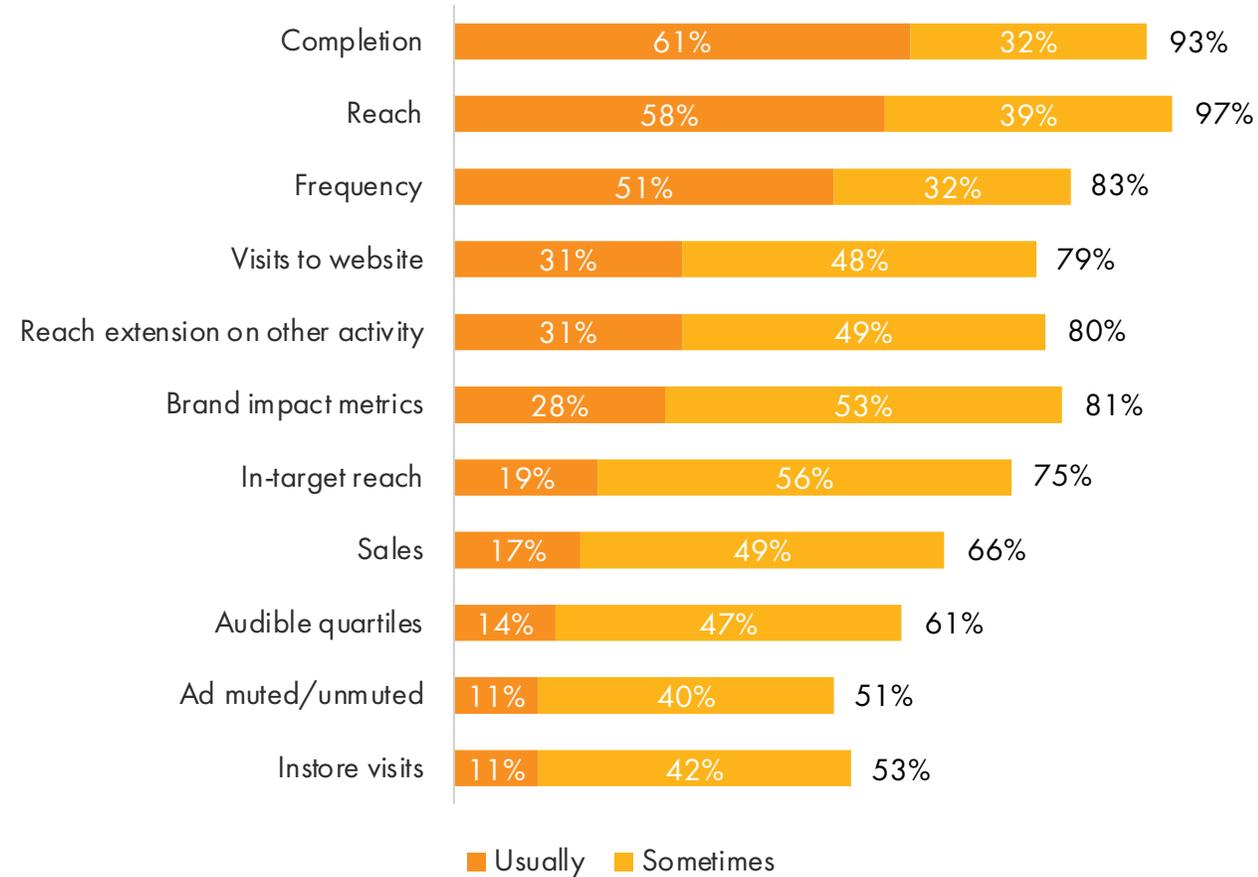
Streaming digital audio effectiveness metrics used



assessment of advertising effectiveness for podcasts



Podcast advertising effectiveness metrics used



measurement is a key industry opportunity

Top 3 agency challenges

Broadcast Radio	Streaming music	Streaming Radio	Podcast
<p>1. Lack of measurement and tracking/standardised metrics</p> <p>2. Lack of evidence of effectiveness</p> <p>3. Lack of addressability</p>	<p>1. Lack of measurement and tracking/standardised metrics</p> <p>2. Lack of advertisers' understanding around audio advertising</p> <p>3. Lack of evidence of effectiveness</p>	<p>1. Lack of evidence of effectiveness</p> <p>2. Lack of measurement and tracking/standardised metrics</p> <p>3. Lack of advertisers' understanding around audio advertising</p>	<p>1. Lack of measurement and tracking/standardised metrics</p> <p>2. Lack of evidence of effectiveness</p> <p>=3. Lack of advertisers' understanding around audio advertising</p> <p>=3.cost</p>

brands/advertisers see different opportunities

Top 3 brand/advertiser challenges

Amongst brands/advertisers, the key challenges stopping audio advertising being a larger proportion of ad volume are in creating compelling creative in broadcast and streaming radio, along with a lack of understanding across all formats.

Broadcast Radio	Streaming music	Streaming Radio	Podcast
=1. Difficulty in creating compelling audio creative	1. Lack of their own understanding around audio advertising	1. Difficulty in creating compelling audio creative	1. Lack of measurement and tracking/standardised metrics
=1. Lack of internal agency resource dedicated to audio advertising	=2. Lack of evidence of effectiveness	2. Lack of agency understanding around audio advertising	2. Lack of agency understanding around audio advertising
2. Lack of agency understanding around audio advertising	=2. Cost	3. Lack of evidence of effectiveness	3. Lack of addressability

in summary

streaming digital audio and podcast advertising

continues to play
a consistent and
integrated role in
media planning.

- **optimise the strengths and confidence agencies and brands have in digital audio advertising**
- **prove to brands/advertisers the effectiveness of audio for brand building**
- **tailor creative to the environment**
- **meet the measurement challenge**
- **grow understanding of digital audio amongst brands and advertisers**

how smes can use digital audio to drive growth



jasmine beech
southern cross
austereo

Bio Beauty Concepts
HD Brows

- Dynamic Audio Creative across
LiSTNR, Hit and Triple M





The challenge:

Get HD Brows on the lips (and eyebrows) of salon owners and beauty consumers in Australia

What we knew:

- HD Brows entering the Australian market
- First time doing audio advertising
- Looking for a creative way to increase brand awareness and product consideration amongst target demographic



Our approach:

Bring a smile to the face of those wanting perfect brows

We mixed light-hearted humour, conversation about the weather and a strong brand value claim, to inform Australians that HD Brows is the best solution for their beauty routines.

BIOBEAUTY
LONDON

HD BROWS
HIGH DEFINITION BEAUTY

LISTNR



「HD BROWS®」

HIGH DEFINITION BEAUTY



Our approach:

A different message was shared with men and women



Weather

Females:

- Foggy
- Clear
- Cloudy
- Windy
- Rain

Males:

- Hot
- Cold

Product

- Brow Glue
- Propencil
- Browtec
- Colourfix

Call to Action

- Shop online and save 20%
- Shop online or ask your brow stylist

What did Australia hear?

These triggers influenced the HD Brows audio campaign:

- Weather
- Product
- Call To Action



Using dynamic creative across both broadcast and digital allowed HD Brows to share a contextually relevant message in real time, for ultimate effectiveness.

Contextually relevant creative increases audio engagement.

What did Australia think?

The results show an increase in brand awareness for HD Brows, and an increase in positivity towards the brand after hearing the dynamic ads.

35% positivity

Over 1 in 3 respondents said they felt more positive towards HD Brows, after hearing the ad.

4th in recognition

HD Brows was the 4th most recognised brand from the brands prompted- with +133% growth

111% awareness lift

Increase in awareness of the HD Brows key brand message

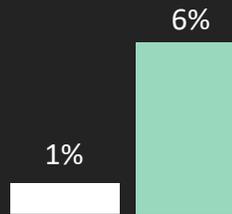
Source: SCA iQ | HD Brows Research | January 2022 | National | Hit Community | Q. Which of the following brands do you recall advertising for in the past month?
| Could Hear Audio | Digital Listeners W18-54 | Pre n=128 Post n=78

Consideration for HD Brows grew by 400%!

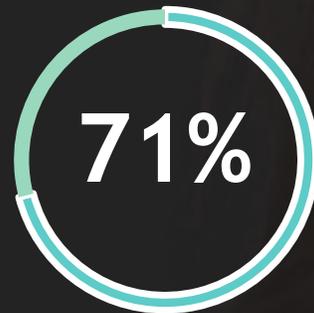
Australian listeners are considering and aware of the HD Brows product.

Unpromoted Ad Awareness Increased by 500%

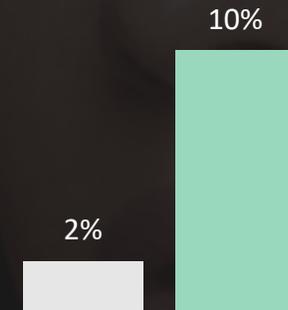
This increase saw HD Brows move from the 5th most recalled brand to 2nd, behind only MAC Cosmetics.



7 in 10 who recalled the ad, took action



Product Consideration Increased by 400%



Source: SCA iQ | HD Brows Research | January 2022 | National | Hit Community | Q. Which of the following brands do you recall advertising for in the past month? | Could Hear Audio | Digital Listeners W18-54 | n=77

Key Learnings

Males have an interest in the product

Those who received the 'Male-Targeted' creative were more likely to explore the website/app/page

Young Australian's are more engaged with the brand

18-24yr olds were more likely to listen for longer

Dynamic variations kept the audience interested

For both target audiences, frequency was 3.7 so the audience was likely to be subjected to 3 or more creative variations.

Woman visit salons frequently

Women 18-29 are the age group most likely to visit a salon monthly, while W30-39 and W40-54 are more likely to visit a few times a year

We're pluckers in Australia

'Tweezing/plucking', 'Waxing at a salon' & 'Filling in eyebrows' are the top three actions across all age groups

Quotes from our listeners

"It's definitely a product I'm interested in. Like the sound of the brand. Will definitely look them up. Grabbed my attention"

"I will give these HD a go, sounds professional"

"They seem innovative , unique and reputable"

"Advert made me interested in researching them more"

"They know what problems I have with my brows and can fix it"



“ The team at SCA were fantastic in putting together an impressive dynamic campaign to help launch HD Brows in Australia. Not only did we experience a jump in sales and increased brand awareness during the campaign period, we have also importantly seen a continued momentum in sales and engagement that has helped establish the brand in the Australian market.

Brad Bergmann
Bio Beauty Concepts

Other clients have also seen success...

These triggers influenced the dynamic audio campaigns:

- Technology
- Weather
- Product
- Sport
- Call To Action



ESS Results

- +50% increase in awareness
- 1 in 5 felt more positive towards the brand as a result of hearing the ads
- 2 in 5 of exposed audiences did something as a result of the campaign- with most heading to the website for more info.

budget direct's approach to audio branding & marketing (virtual)



ralph van dijk
eardrum & resonance
sonic branding



jonathan kerr
auto & general



fireside chat - audio; an agency & marketers view



liam Pook
phd melbourne



aden eltchelebi
asahi / carlton &
united breweries



sam moles
spotify

audible case study - using integrated podcast advertising to drive engagement



shannon hollis
news corp



polly blenkinship
audible, Inc



felicity harley
healthy-ish podcast

ways for marketers to make the most of digital audio opportunities



**stephanie
famolaro**
the trade desk



denis donati
arn



andrea salmon
sca



daniella kenney
amplifi anz



**anthony
o'callaghan**
essencemediacom
australia

iab resources

2023

**audio
state of the
nation**



2022

**audio buyers
guide**



2022

**expenditure
report**

