

2023

audio summit

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maddy mewing
magnite



mia stern
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jo dick
cra



adrian bingham
spotify



jonathan mandel
sco



keegan litchfield
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kristine celona
verizon



liam daly
acast



sam moles
spotify



ralph van dijk
eardrum & resonance
sonic branding



shannon hollis
news corp



nathan mcCahon
nova



nicole spencer
the trade desk



pat danahy
google



richard howells
arn



tim armstrong
nova



tracey gillan
arn



richard palmer
triton digital

australian digital audio revenue: market data release



ford ennals

cra



gai le roy

iab australia

CRA
COMMERCIAL RADIO & AUDIO

iab.
australia

online advertising expenditure report

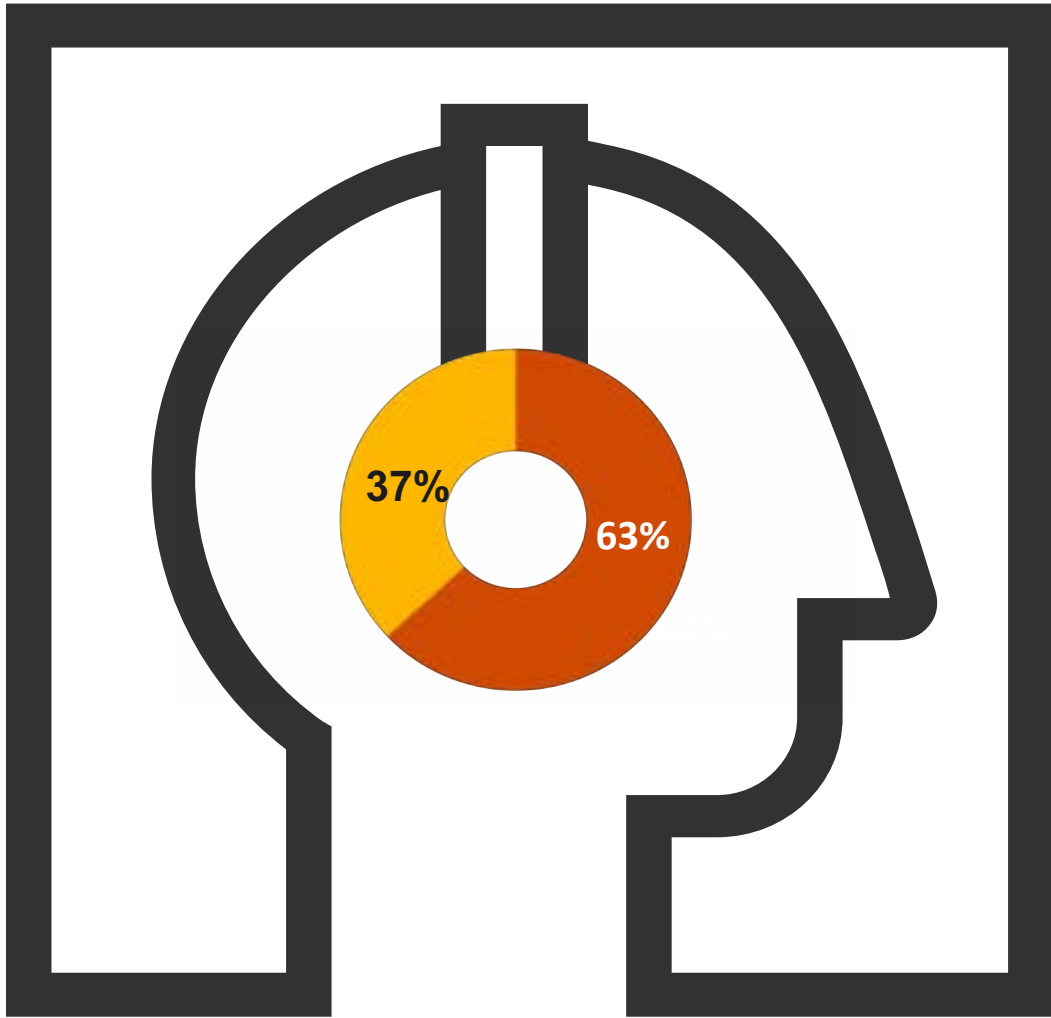
cy22 & december quarter | 2022



iab.
australia

background

sli.do #audiosummitsyd23



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



IAB Australian Online Advertising Expenditure Report 2022



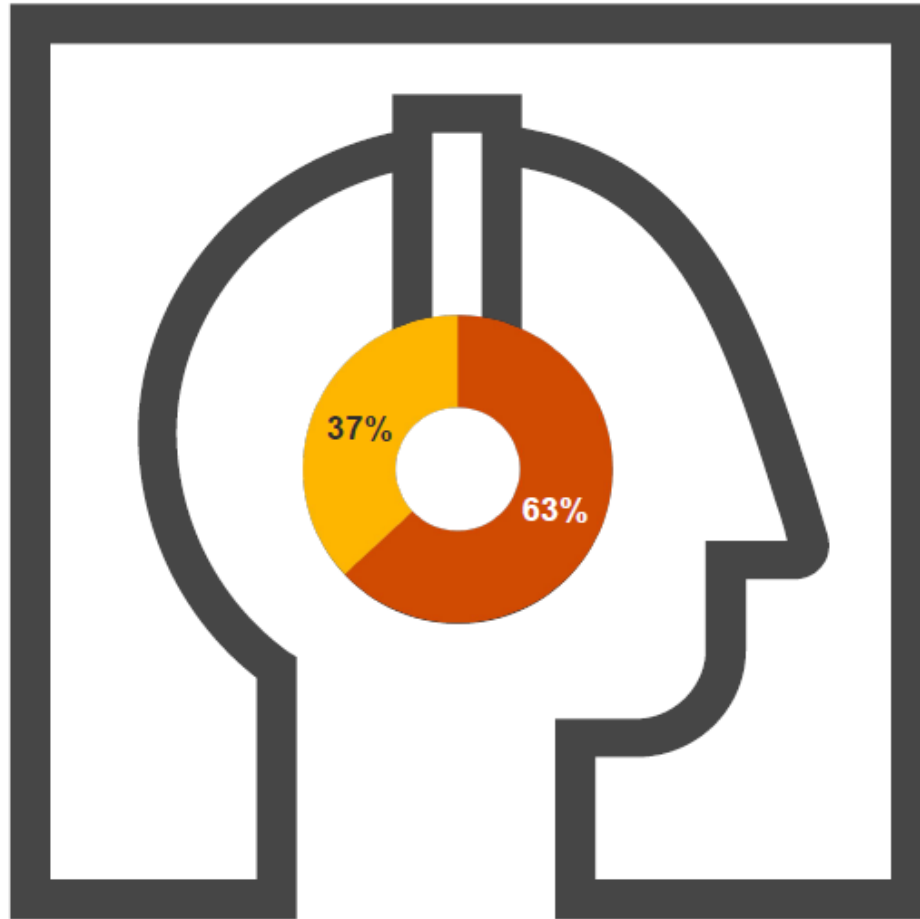


CRA
COMMERCIAL RADIO & AUDIO

**AUDIO
UNLIMITED**

FORD ENNALS
CEO COMMERCIAL RADIO & AUDIO

DIGITAL AUDIO MARKET



The total Australian online audio advertising market in CY22 was

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4.0%

of total CY22 general display advertising expenditure

\$82.5m

Podcast advertising expenditure

\$138.7m

Streaming advertising expenditure

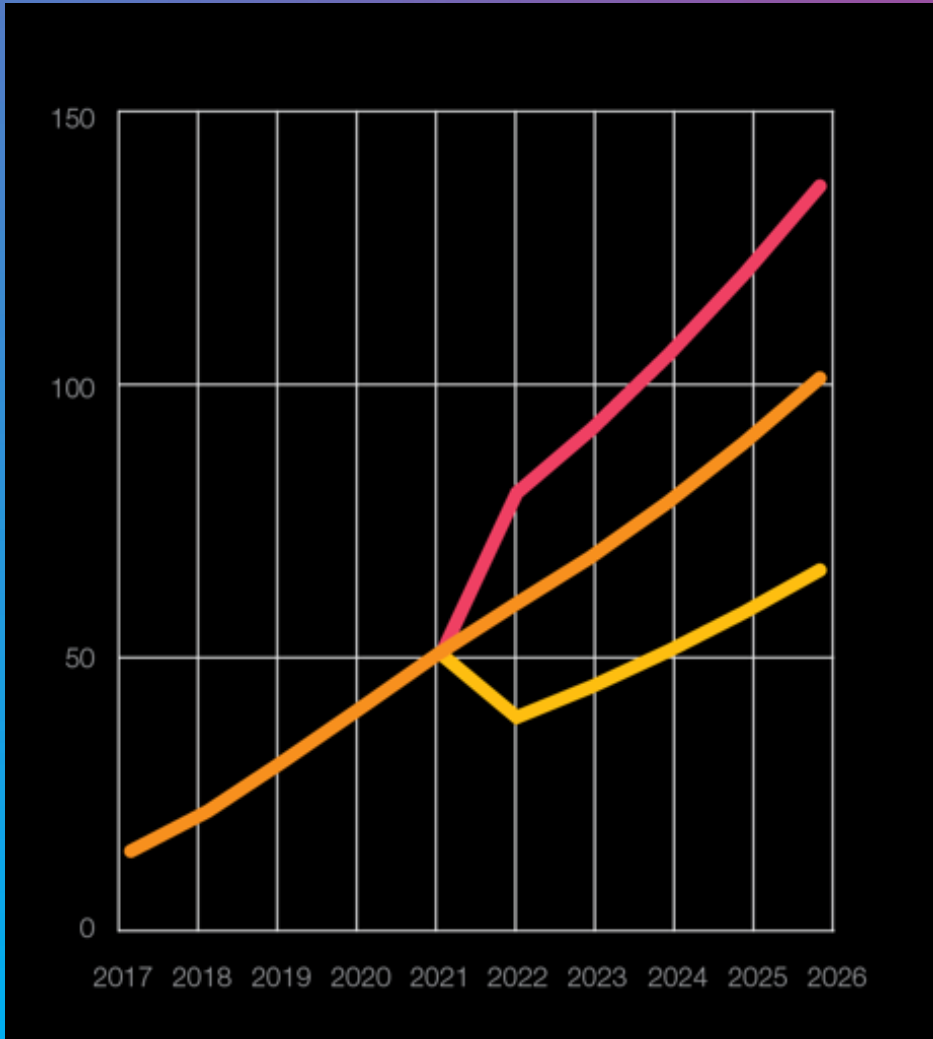
UK DIGITAL AUDIO GROWTH

Digital audio grows by 58%

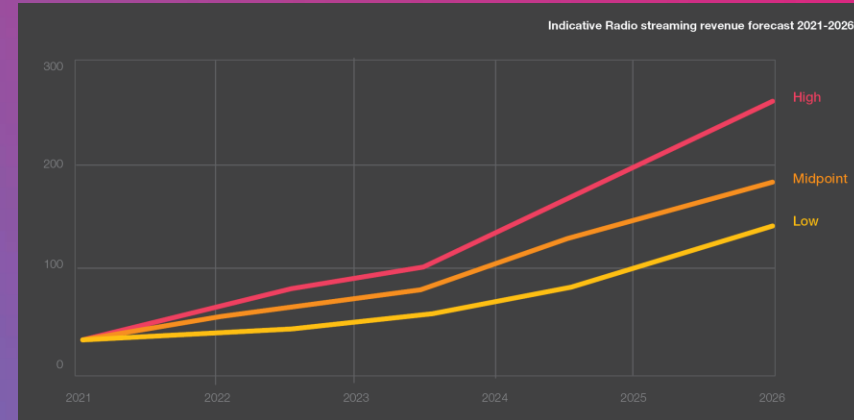




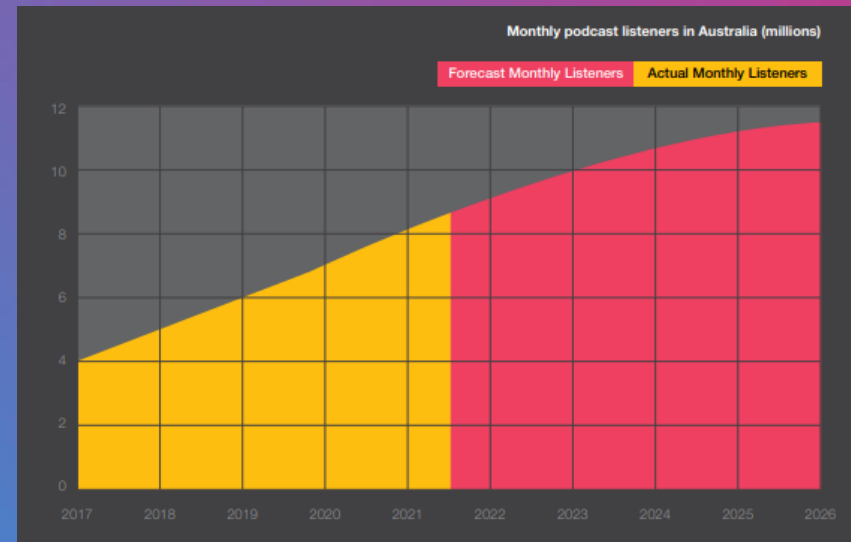
PWC PROJECTS STREAMING AND PODCAST REVENUE GROWTH



PODCAST GROWTH



RADIO STREAMING REVENUE GROWTH

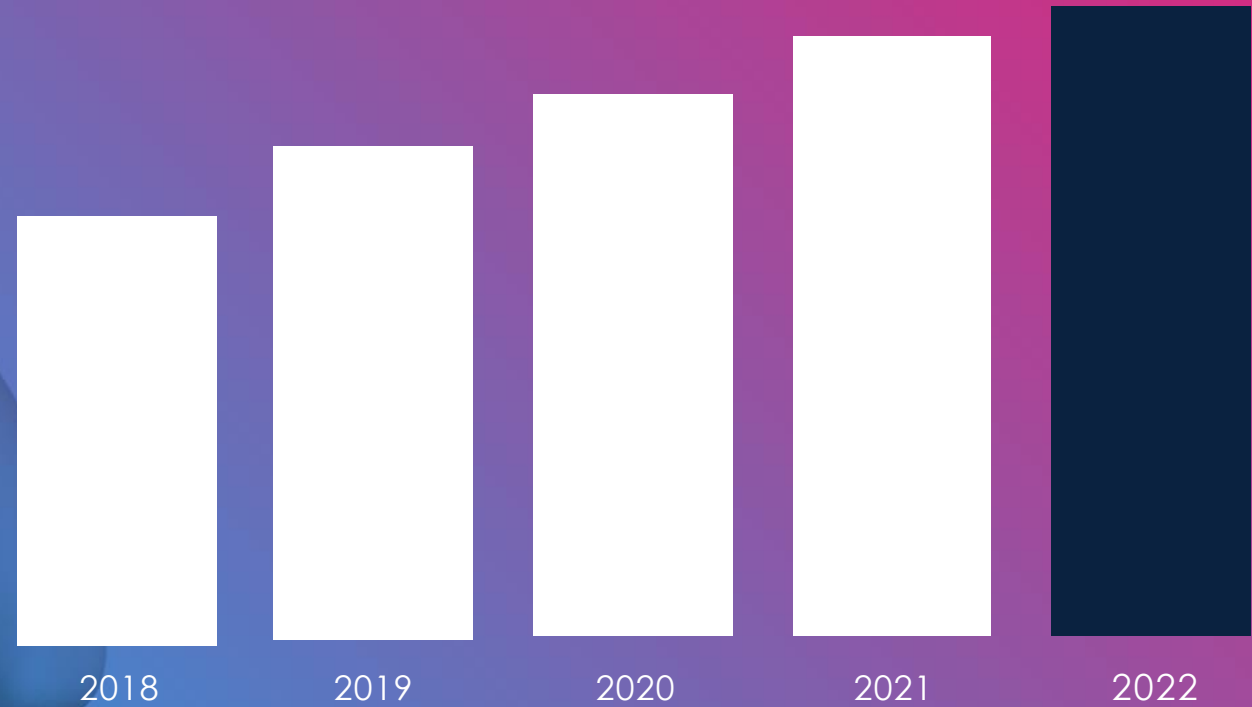


PODCAST REVENUE GROWTH

DIGITAL AUDIO LISTENING GROWTH

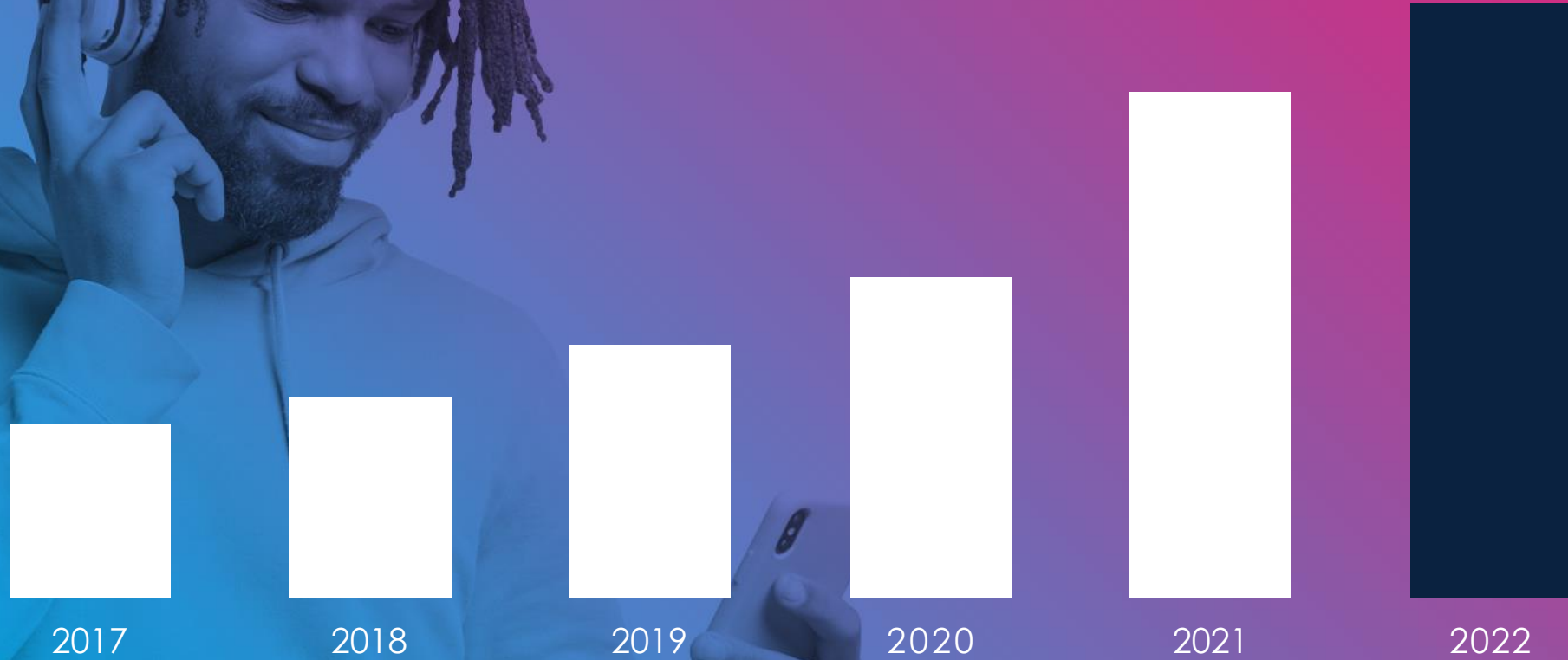
78% OF AUSTRALIANS LISTEN TO DIGITAL AUDIO EVERY MONTH

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

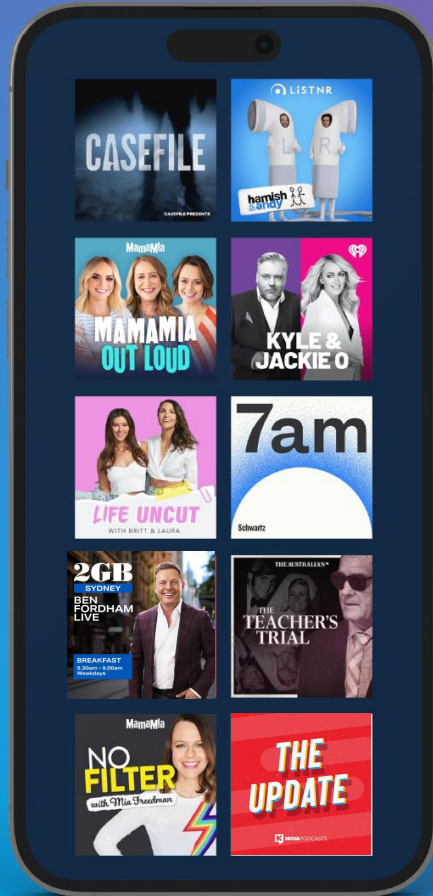
MUSIC STREAMING

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)



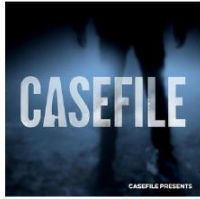
8am

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

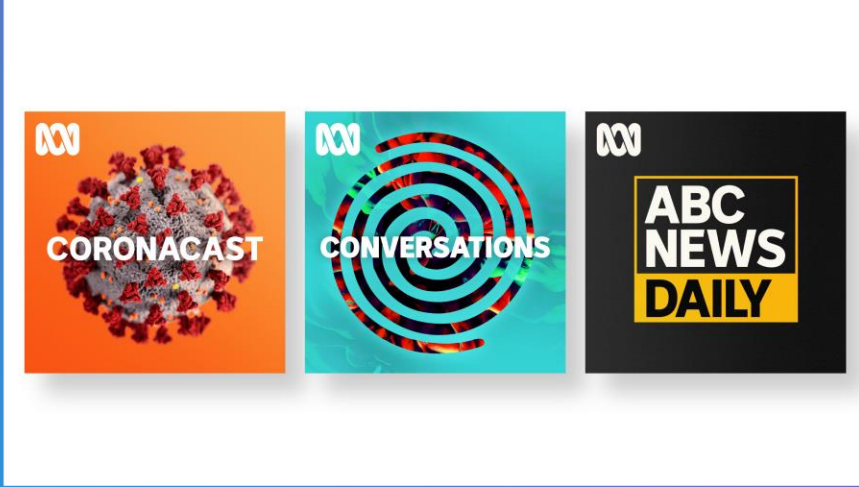


Average downloads
per listener per week

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



CRA | **RADIO 360°**
COMMERCIAL RADIO & AUDIO

HYBRID MEASUREMENT SYSTEM



DIGITAL



DATA



WATCH

COMMERCIAL RADIO & AUDIO
THANK YOU



audio advertising state of the nation: wave 7



natalie stanbury
iab australia

background

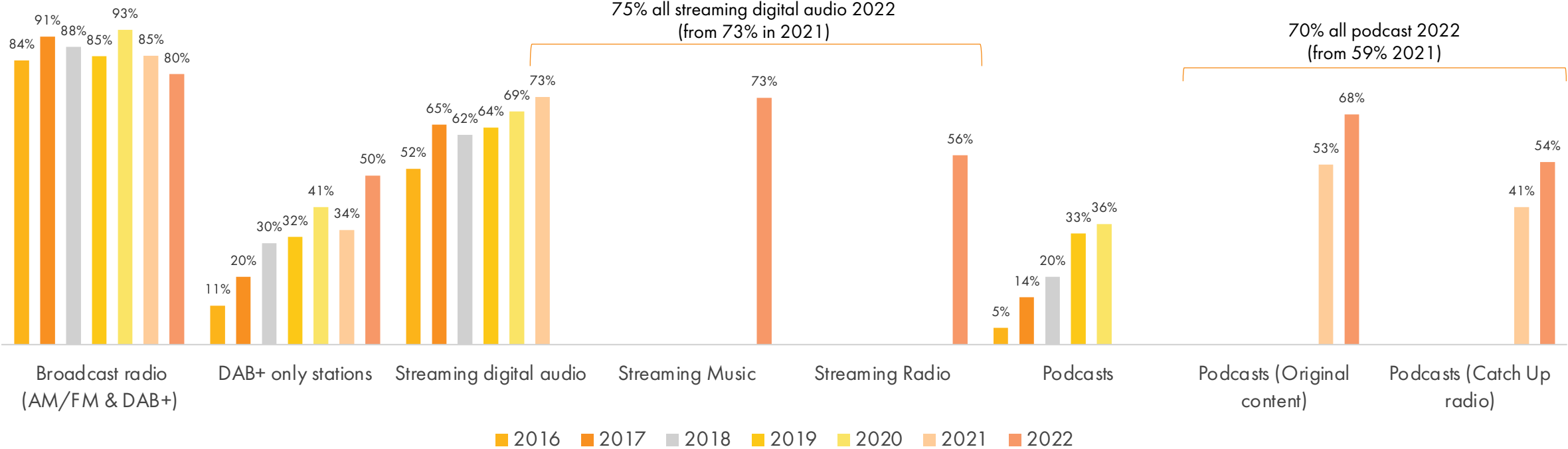


- This study was conducted by independent research company, Hoop Research Group
- Fieldwork was carried out in December 2022 and January 2023
- 249 survey responses were collected
- Respondents are decision makers or influencers in the allocation of marketing spend and either placed or planned audio 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

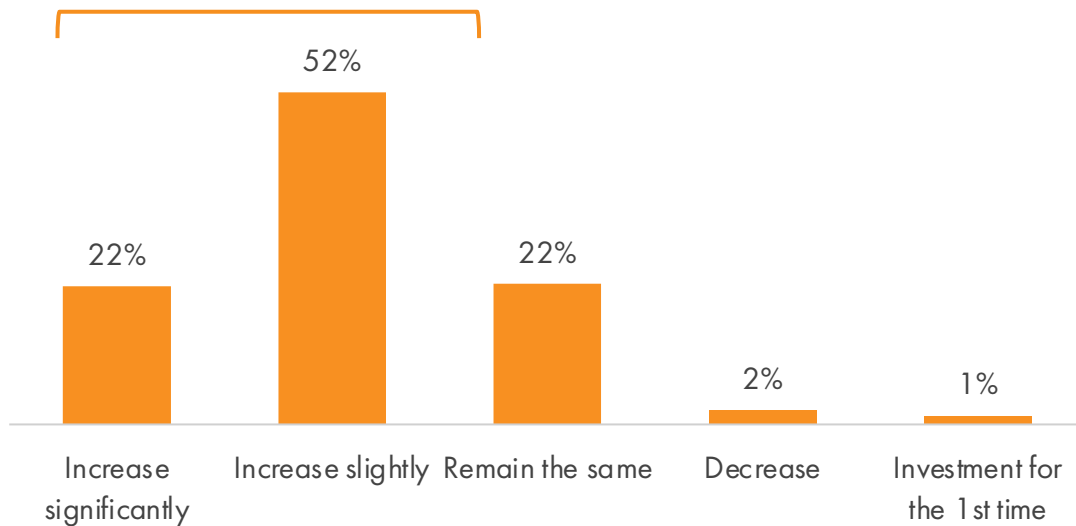
media agencies where audio is a significant or regular part of activity



audio investment plans for 2023

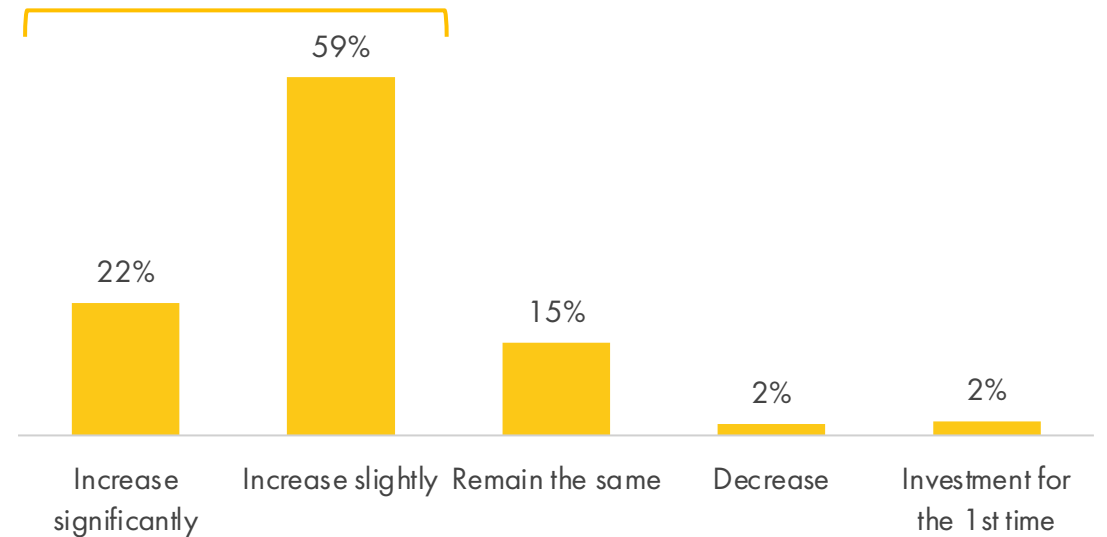
streaming audio

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



podcast

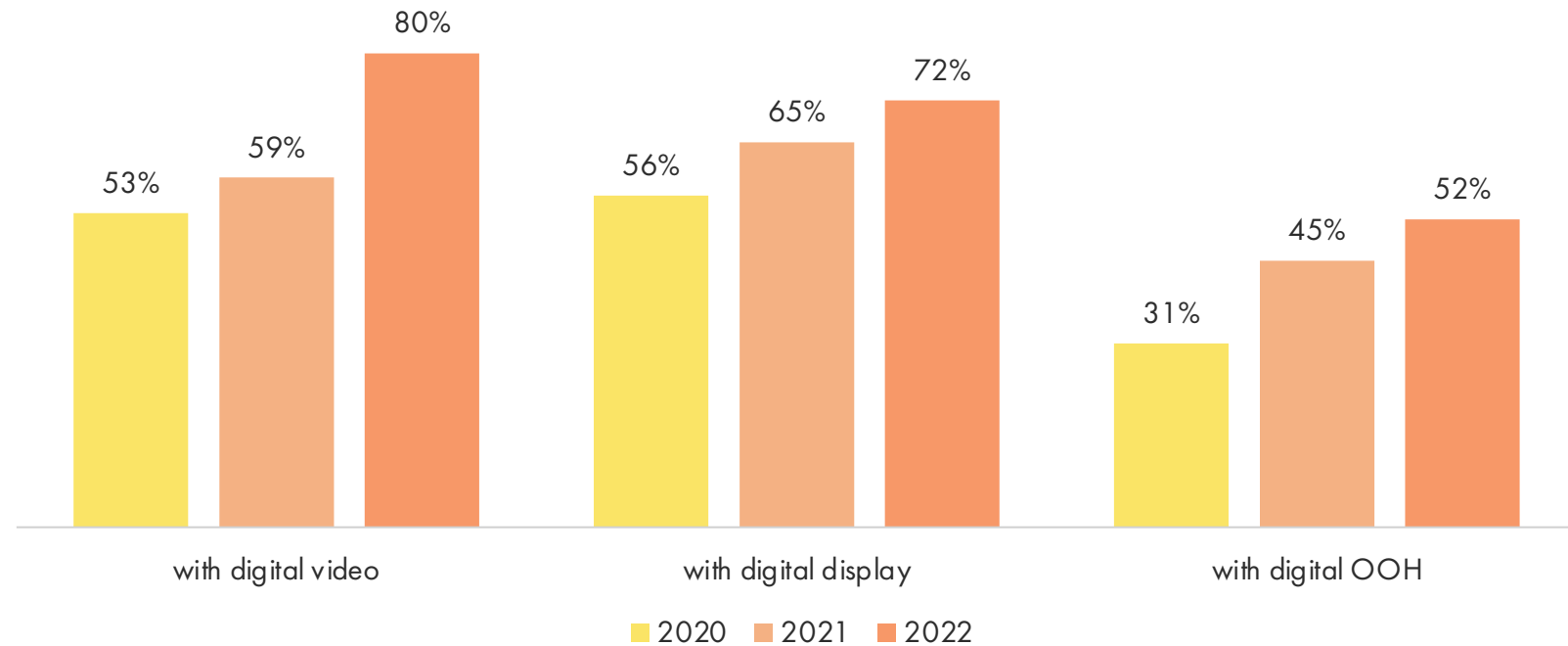
81% (78% of media agencies) intend to increase investment in podcast advertising in 2023.



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%).

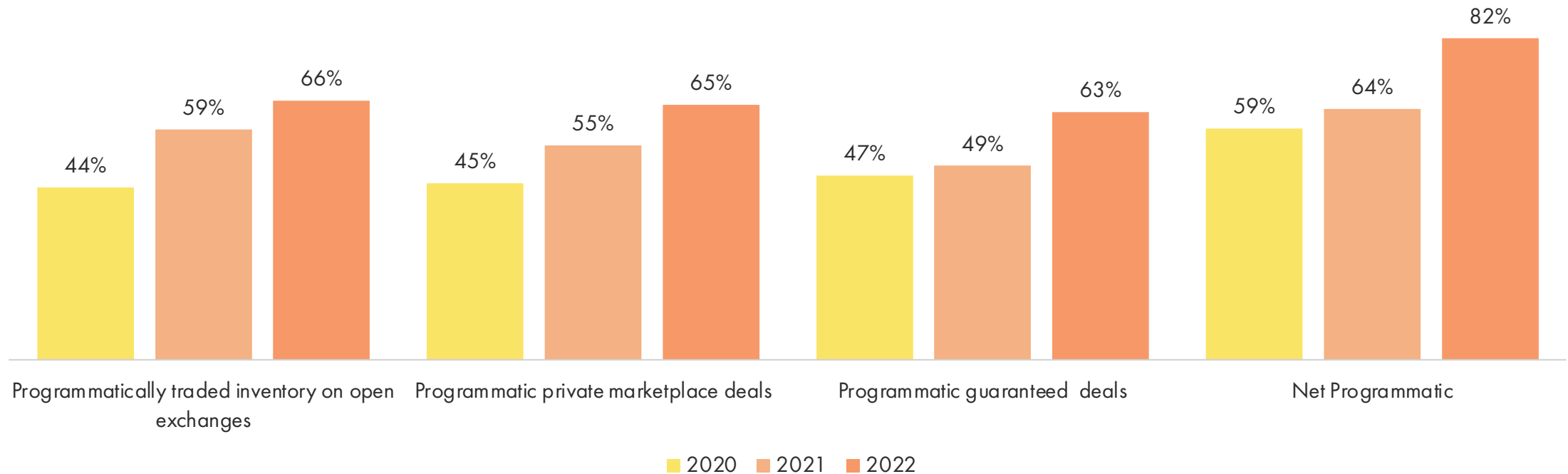
media agencies planning and buying digital audio with other digital advertising types



programmatic expected to increase again

8 in 10
intend to buy
programmatic

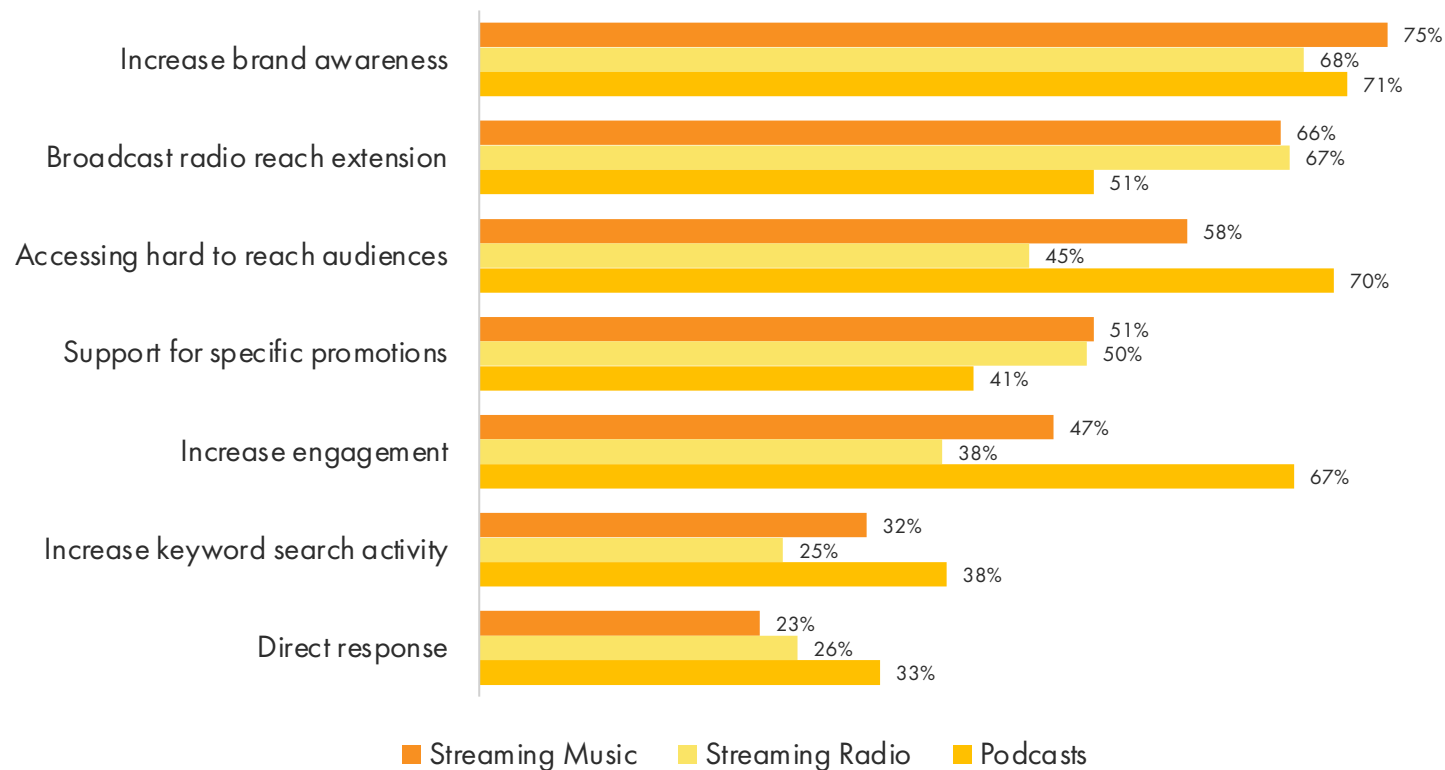
buying methods media agencies intend to use for audio advertising over the next 12 months



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.

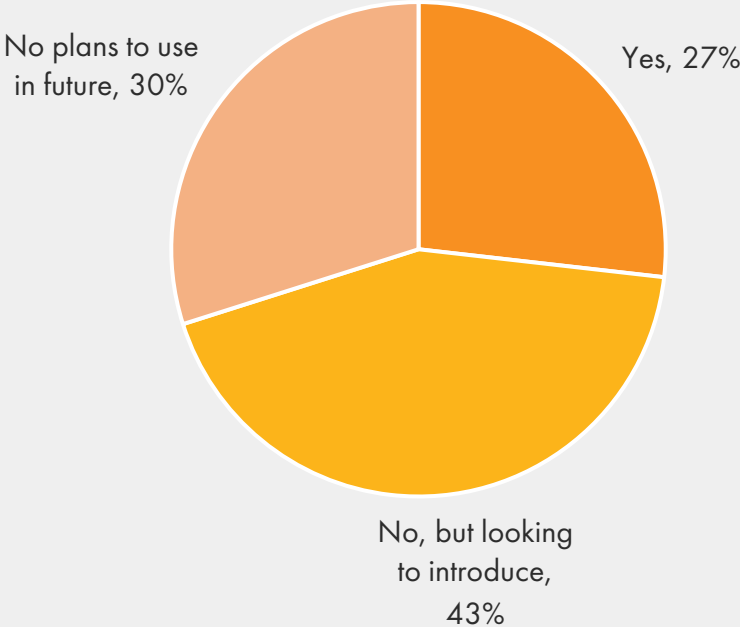


consistent usage of sonic branding

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

Sonic branding

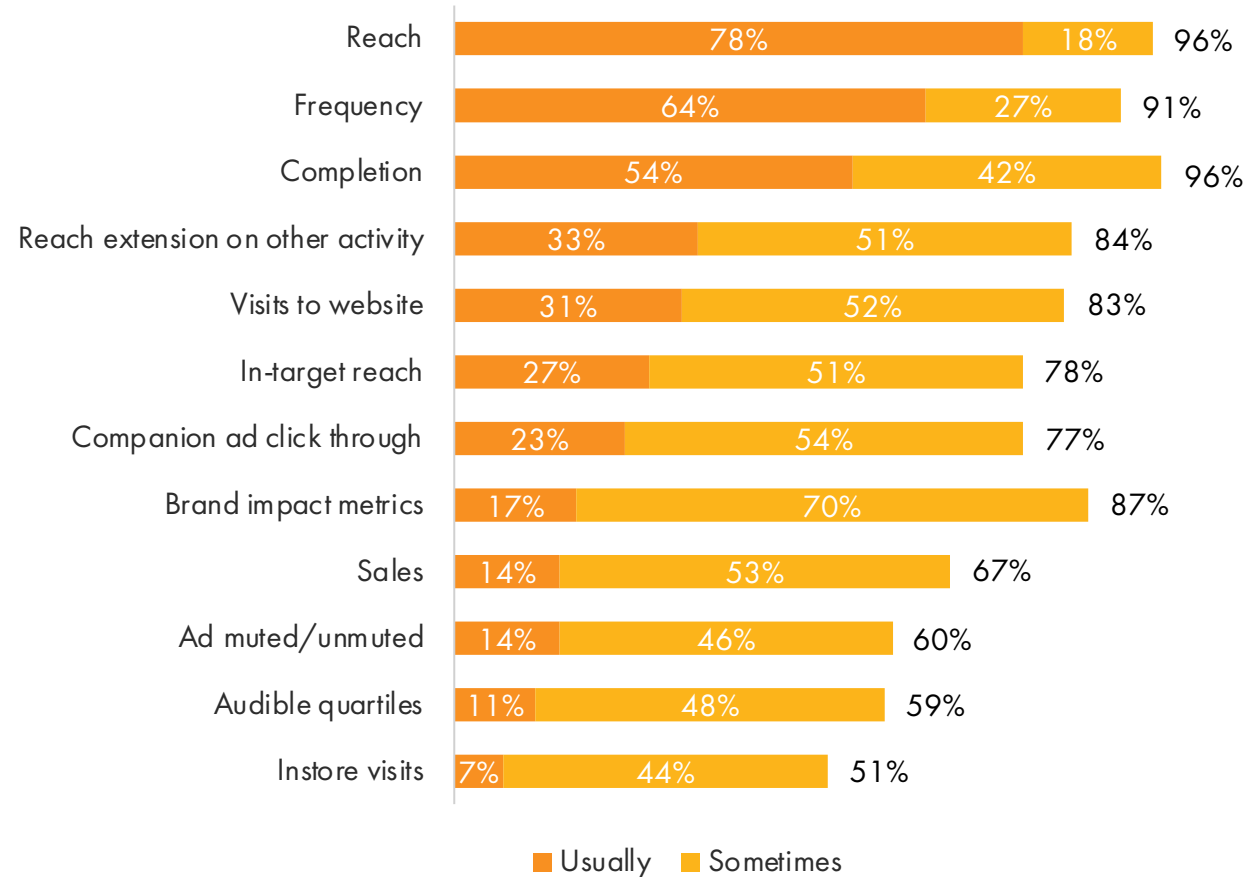
27% of agencies use sonic branding consistently. Intention to introduce consistent sonic branding is high at 43%.



assessment of advertising effectiveness for streaming digital audio



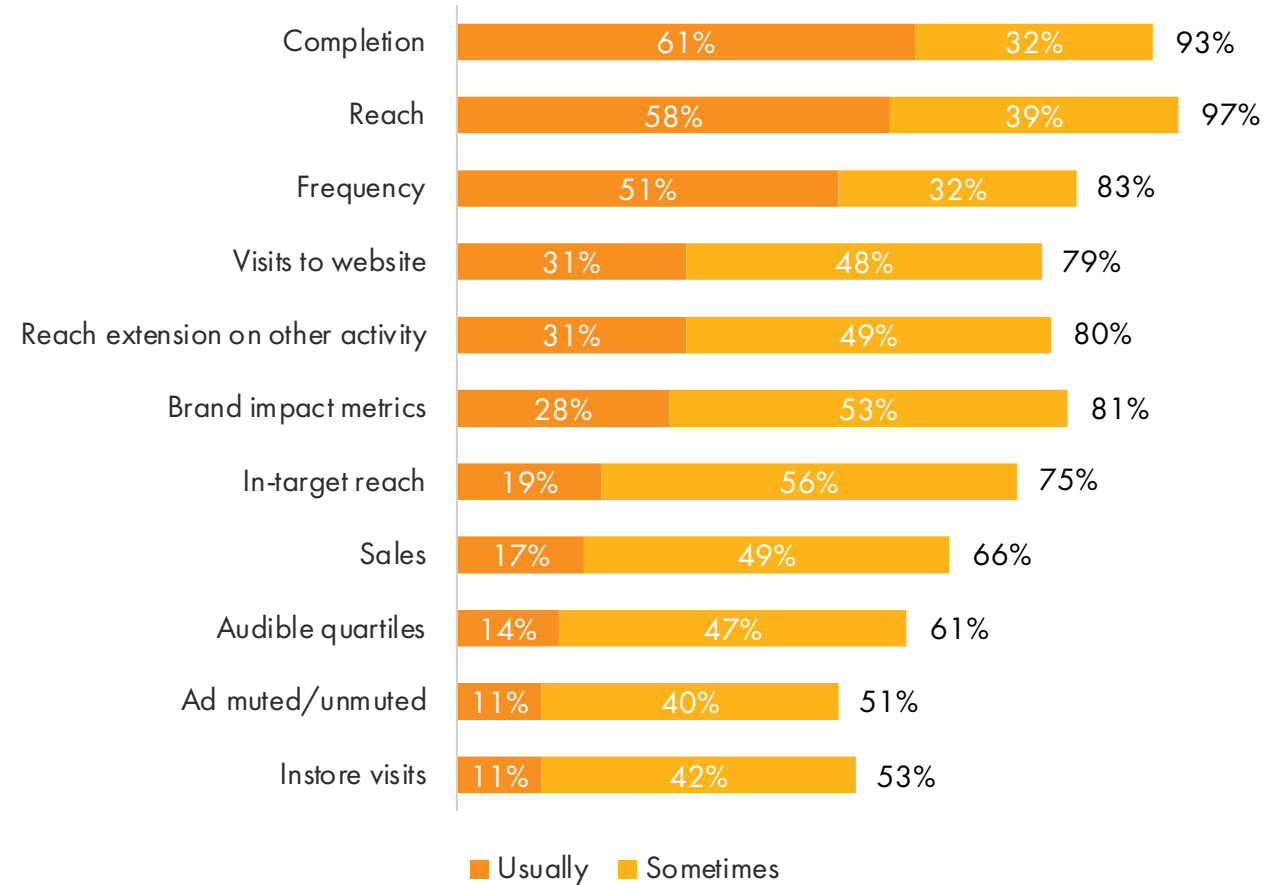
Streaming digital audio effectiveness metrics used



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**

bws case study: use of audio to address market changes



nat o'shea
spotify



jax young
bws



adrian bingham
spotify



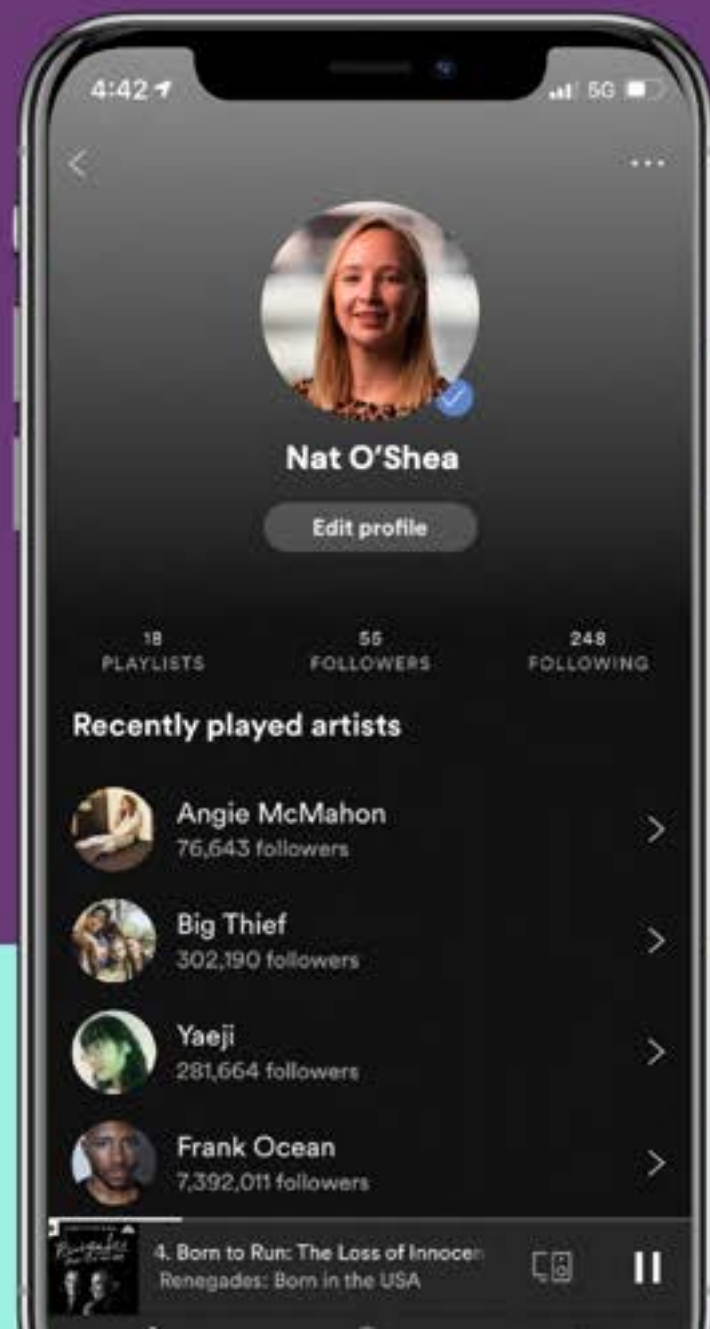
brooke pilton
bring agency





Nat O'Shea

Client Partner
Retail - ANZ



The BWS Cool Room

IAB Audio Summit
Sydney 1st March 2023



Today's Playlist

01

Challenge &
Objectives

02

Strategy &
Solution

03

Campaign
Performance

04

Fireside Chat



Today's Playlist

01

Challenge &
Objectives

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Solution

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04

Fireside Chat



Challenge

The Liquor industry is becoming increasingly competitive with the growth of small boutique offerings and pure play e-comm retailers stealing share from mainstream bottle shops.

There is also a rising trend among Milz (Gen Z, Young Millennials - 18+) where they are drinking differently.



Objective

Get Milz who are intimidated to walk into bottle shops

... to enjoy the bottle shop experience

... by rewriting the rules to create a place where young aussies belong.

Today's Playlist

01

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Fireside Chat



Our Strategy

We knew that 84% of Milz were over livestreams.

They want live events, they want interaction and most importantly, they want their favourite artists IRL.

This gave BWS a unique opportunity to create something truly memorable for fans.



84%

of Milz are over live streams

Our Solution



The Idea

Heading into the bottle shop may not seem like fun on face value.

So BWS developed the world-first performance, party and promotion series based on a bottle shop's defining feature:

the cool room.



Campaign Phases

01

BWS hosted a competition to drive users to enter and win a chance to an exclusive and intimate gig inside the BWS Cool Room in Sydney or Melbourne.

We utilised the full Spotify suite to target the BWS audience based on their interest, behaviours and also specific party and social mood and moments.





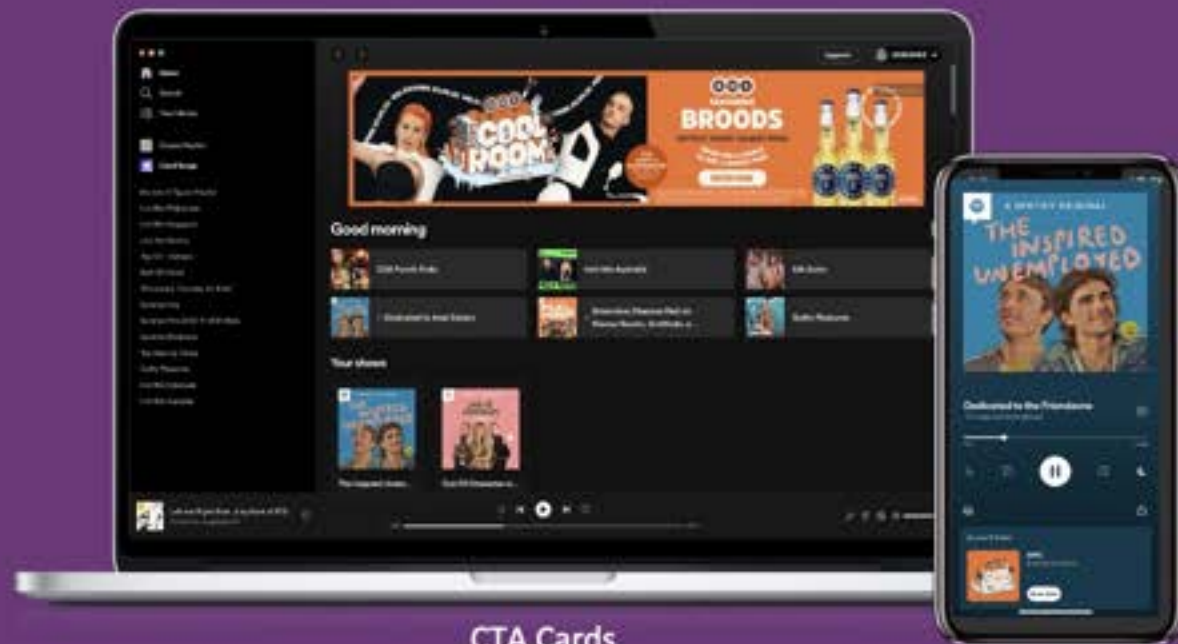
Audio & Video Takeover



HPTO



Desktop & Mobile Overlays



CTA Cards

Campaign Phases

02

To drive brand engagement and excitement, we developed a bespoke microsite which temperature checked users' Spotify streaming habits, whether they be; chill, medium or hot temp.

Users were then matched to a personalised Spotify playlist and paired with the perfect BWS product & discount code to encourage users to purchase.



Campaign Phases

03

We also worked with the artists Client Liaison and Broods to create playlists that are housed on the BWS branded profile on Spotify to continue to drive their music strategy and connection with the Milz audience.



Today's Playlist

01

Challenge &
Objectives

02

Strategy &
Solution

03

Campaign
Performance

04

Wrap &
Fireside Chat









Campaign Performance

Delivery 14M Impressions

Reach 1.7M Uniques

Awareness +23%

Ad Recall +22%

Favorability +11%



Today's Playlist

01

Challenge &
Objectives

02

Strategy &
Solution

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Campaign
Performance

04

Fireside Chat

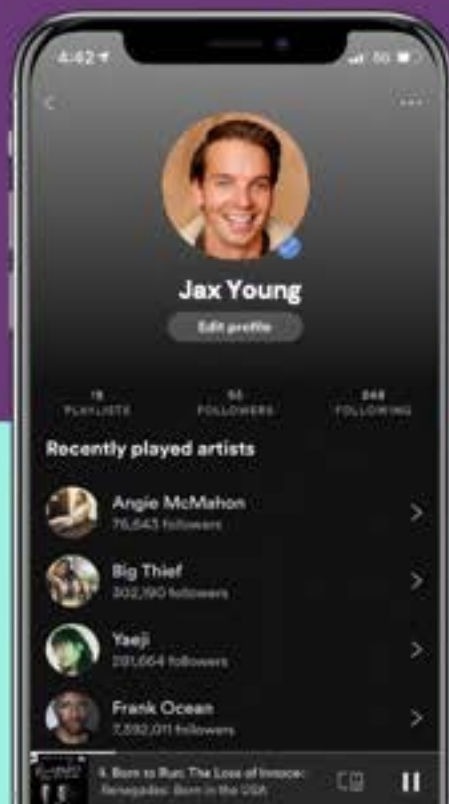




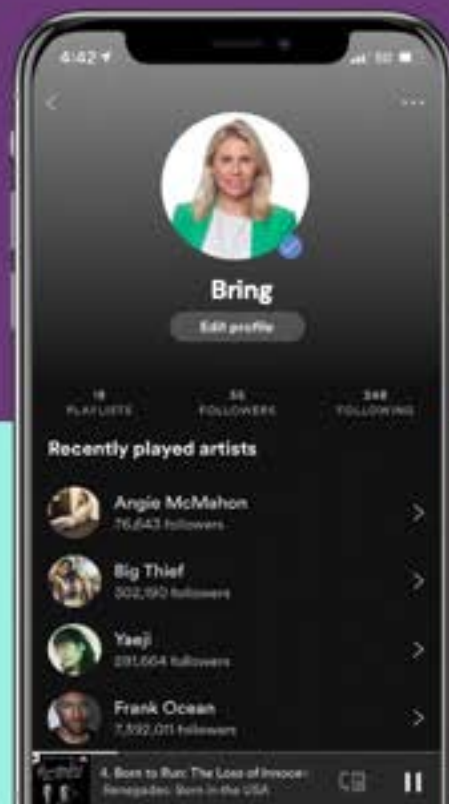
Adrian Bingham
Head of Sales, AUNZ



Jackson Young
Marketing Manager



Brooke Pilton
Executive Partnership Director



audible case study - using integrated podcast advertising to drive engagement



shannon hollis
news corp



polly blenkinship
audible, Inc



felicity harley
healthy-ish podcast

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
CONCEPTS

HD BROWS
THE PERFECT BROW SOLUTION

LISTNR



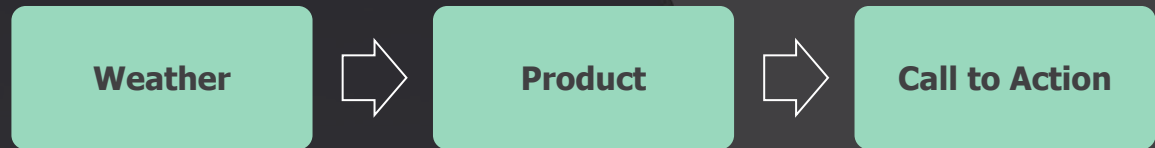
HD BROWS[®]

HIGH DEFINITION BEAUTY



Our approach:

A different message was shared with men and women



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

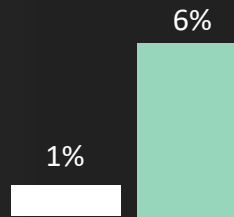
Source: SCA iQ | HD Brows Research | January 2022 | National | Hit Community | Q. Which of the following brands do you recall advertising for in the past month?
| Could Hear Audio | Digital Listeners W18-54 | Pre n=128 Post n=78

Consideration for HD Brows grew by 400%!

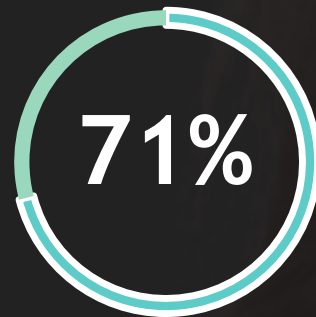
Australian listeners are considering and aware of the HD Brows product.

Unpromoted Ad Awareness Increased by 500%

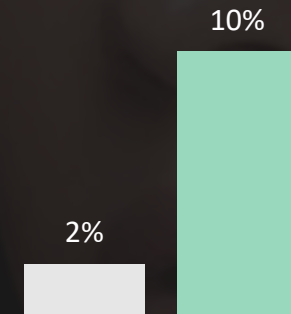
This increase saw HD Brows move from the 5th most recalled brand to 2nd, behind only MAC Cosmetics.



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



ways for marketers to make the most of digital audio opportunities



**stephanie
famolaro**
the trade desk



julian ho
youtube



zac selby
dentsu



**matthew
waldbauer**
soundcloud

iab resources

2023

**audio
state of the
nation**



2022

**audio buyers
guide**



2022

**expenditure
report**

