

Digital Audio Special Research :

Consumption and
Attitude Towards
Advertising

Market: France
July 2022

Digital audio campaigns deliver both **attention & reach**

1 Digital audio is the best medium in terms of attention to advertising

Ads on digital audio formats draw more attention compared to ads on other formats

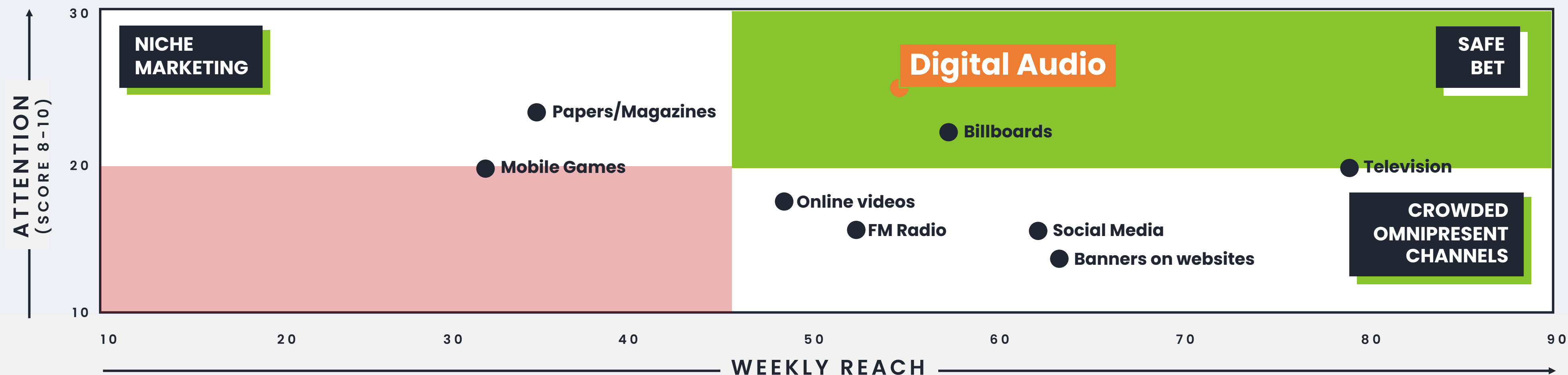
2 Digital audio ad formats perform better compared to online ad formats such as video or display

Compared to other online ad formats, such as banners or videos, digital audio ads are perceived as more useful, providing inspiration, are more relevant and credible and on top of that are perceived as less disturbing.

3 Digital audio brings an outstanding incremental reach to FM radio

Digital audio has a weekly reach of almost 50% of the French consumers, in line with FM radio. The reach of these digital platforms is even higher among 16 to 34 year olds, where digital audio rises to 61% reach.

Of all weekly audio consumers one out of four is an exclusive digital platform listener (18% of the total population)



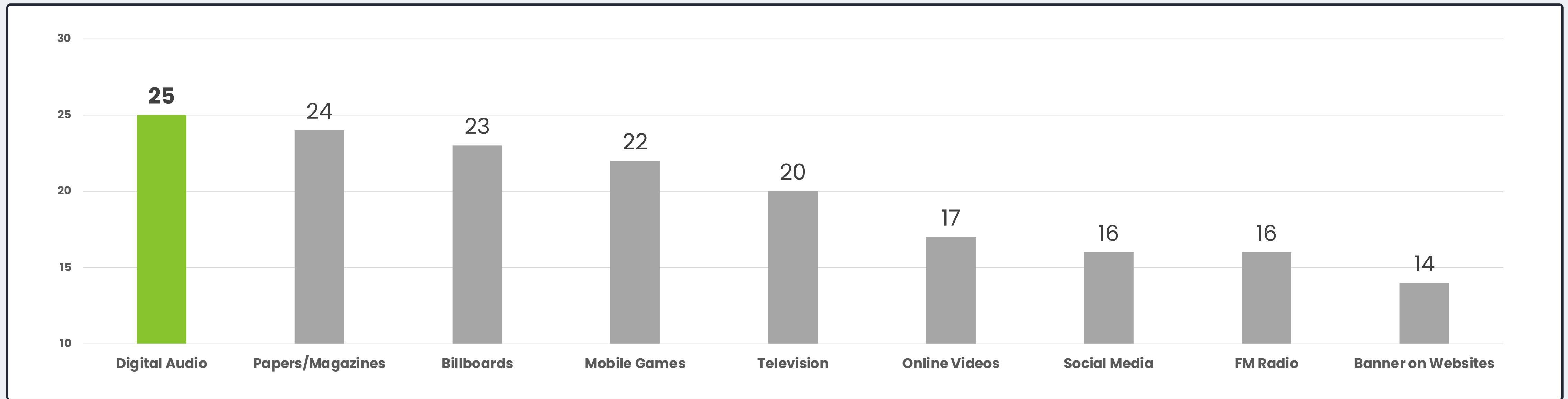
METHODOLOGY

- IPSOS STUDY in France for Targetspot
- 1000 online interviews
- July 2022

Digital audio is the **BEST** media in terms of **attention to ads**

Ads on digital audio formats draw more attention compared to ads on other formats

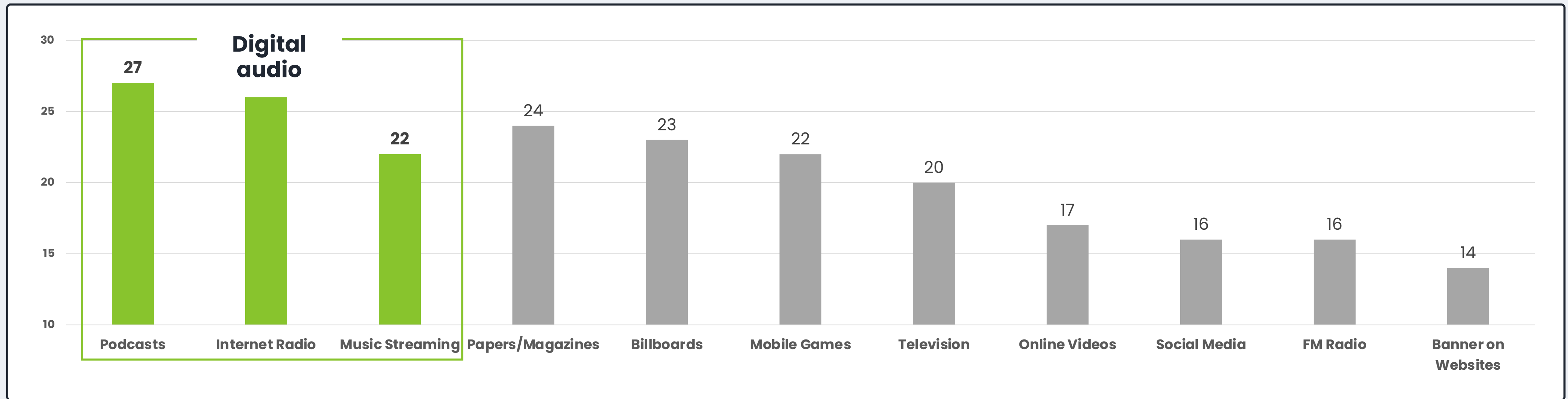
ATTENTION TO ADVERTISING SCORE (top 3 score 8-10)



Question: When you hear/see an advertisement on ..., how attentively do you watch/listen to it?

Podcasts ads are particularly noticed, with an exceptional score for 35-54y

ATTENTION TO ADVERTISING SCORE (top 3 score 8-10)

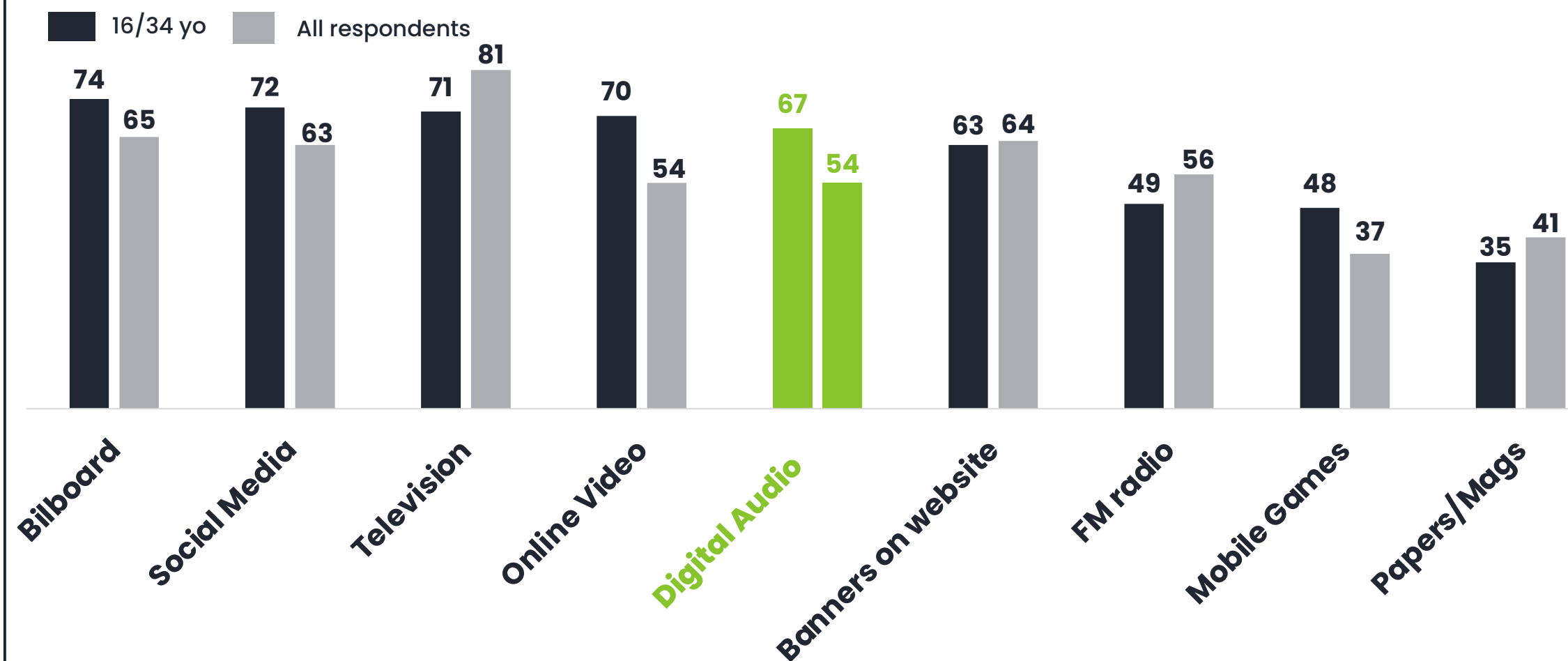


Question: When you hear/see an advertisement on ..., how attentively do you watch/listen to it?

Digital audio has a broad reach among the general population, and is consumed by two thirds of 16-34 y.o

Digital audio reaches more than half of the french consumers, comparable to FM radio or video platforms

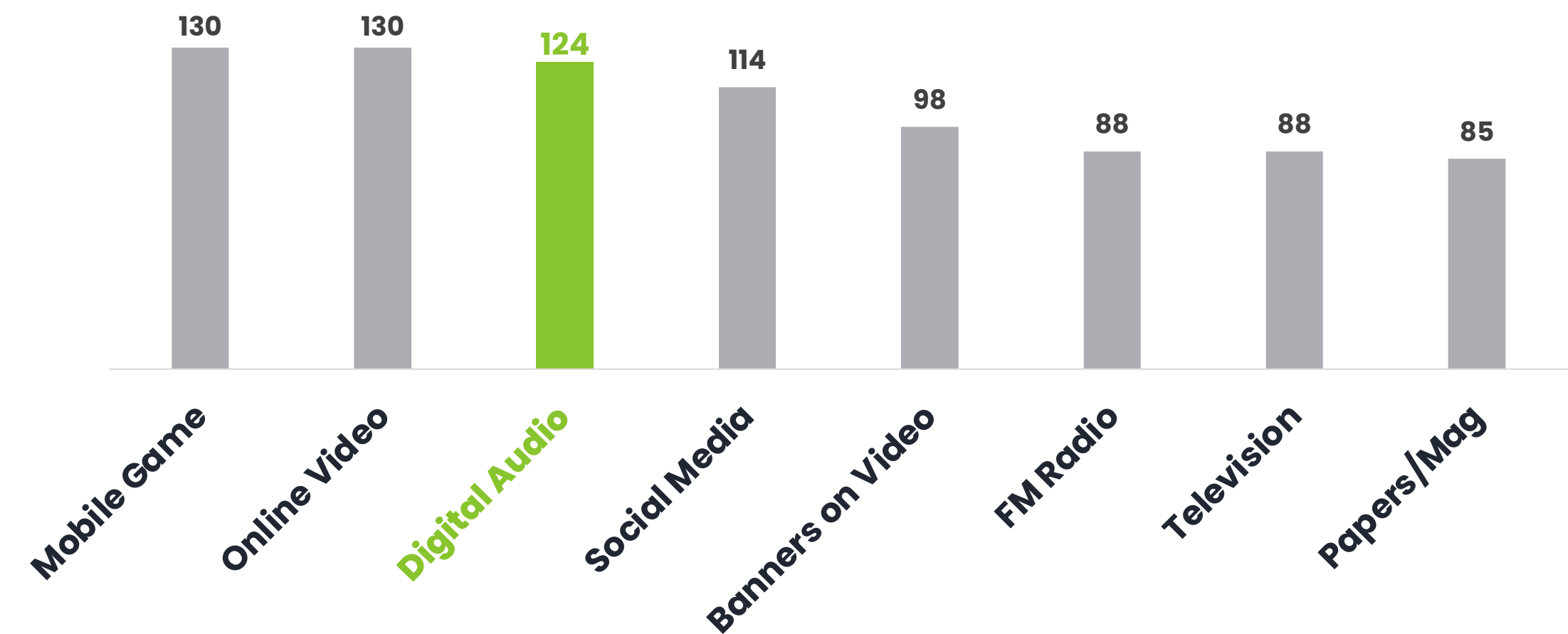
MEDIA CONSUMPTION PAST 30 DAYS



Question: Which of the following media did you consume in the past 30 days? | Q1b. Did you see posters on billboards in the past 30 days?

Such as mobile games and online video, digital audio is more consumed by 16-34 y.o than by the general pop

CONSUMPTION INDEX 16-34 year old VS ALL RESPONDANTS

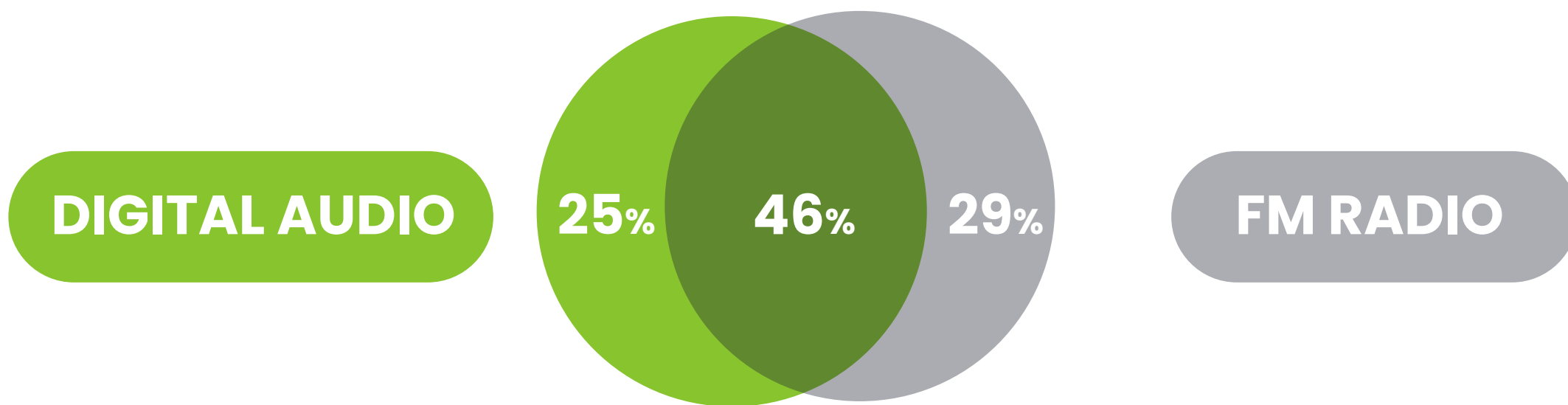


Question: Which of the following media did you consume in the past 30 days? | Q1b. Did you see posters on billboards in the past 30 days?

Digital audio brings an outstanding incremental reach to FM radio

25% of audio reach comes exclusively from digital audio

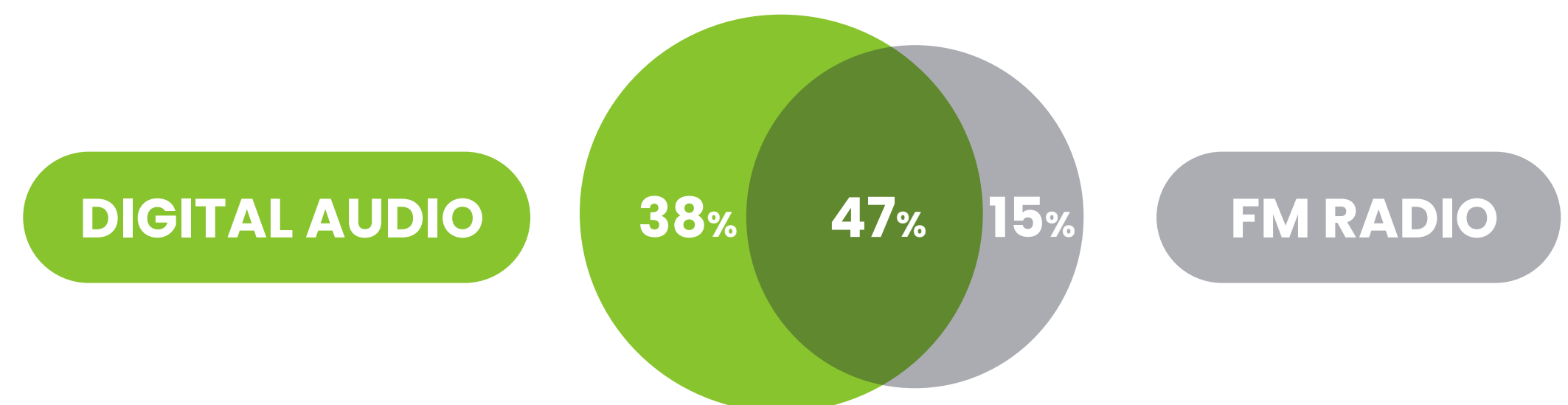
MEDIA OVERLAP OF AUDIO LISTENERS



Question: Which of the following media did you consume in the past 30 days? | Q1b. Did you see posters on billboards in the past 30 days?

4 in 10 people younger than 35 listens exclusively to digital audio

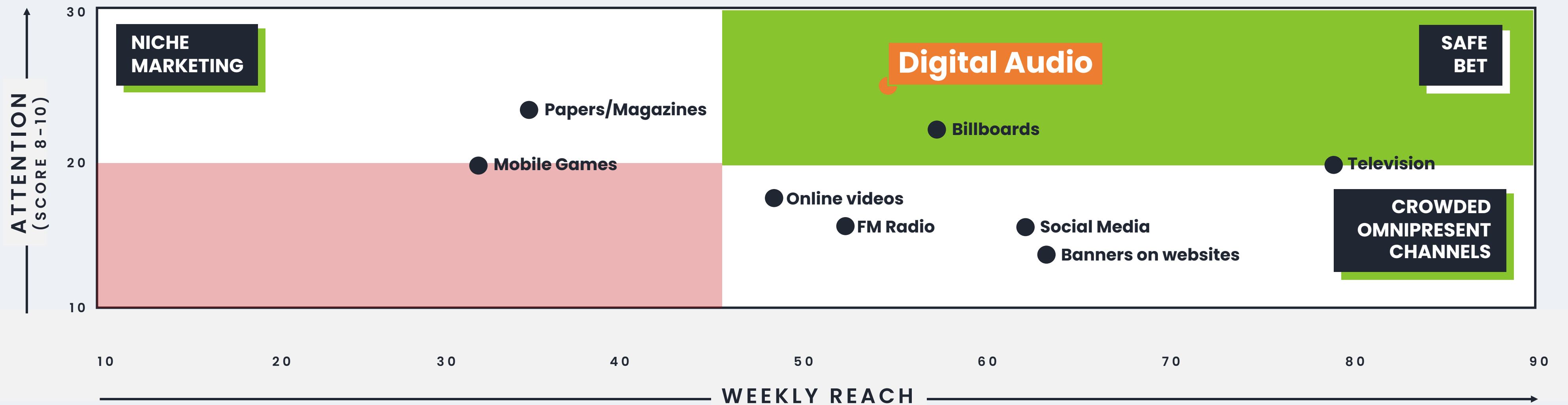
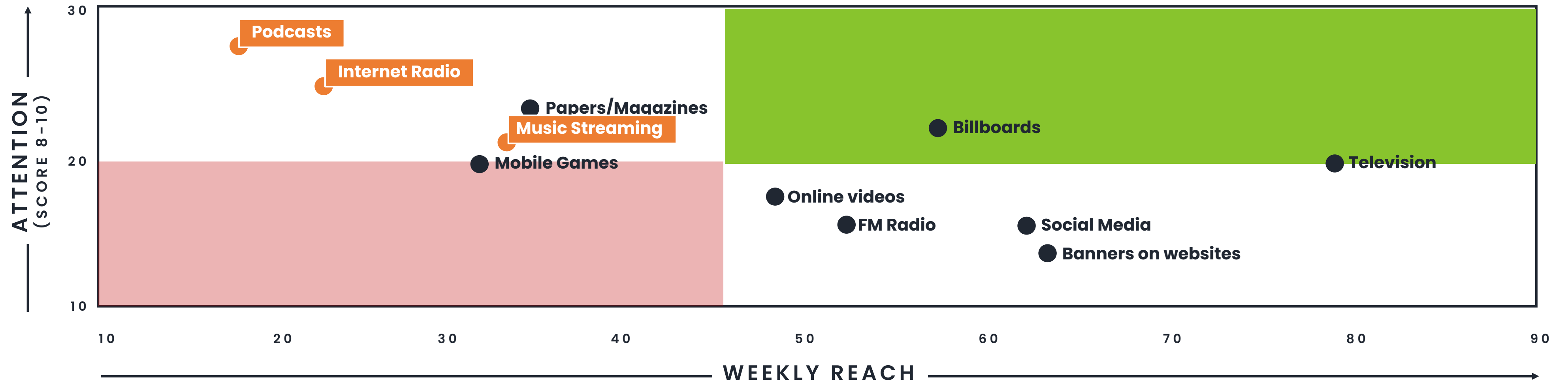
MEDIA OVERLAP FOR 16-34yo AUDIO LISTENERS



Question: Which of the following media did you consume in the past 30 days? | Q1b. Did you see posters on billboards in the past 30 days?

When the 3 dimensions are combined, digital audio as a whole brings **both scale and attention**

Podcasts and internet radio have an **amazing attention score...**



Digital audio medium can work for **any kind of advertising goal**

MEETING OBJECTIVES - INDICES

	Brand Awareness	Brand Understanding	Call to action	Brand Image	Brand Loyalty
Digital Audio	99	103	99	108	112
↳ Ads in podcasts	105	105	86	113	103
↳ Ads on internet radio	104	107	105	118	128
↳ Ads on music streaming platforms	92	97	103	98	106
Ads on FM radio	102	100	98	100	87
Ads in mobile games	96	92	91	74	86
Ads on television	107	113	110	111	105
Ads on billboards	98	97	106	103	98
Ads in newspapers - magazines	104	132	100	112	101
Ads in online videos	108	101	98	100	94
Bannering on websites	88	64	103	72	103
Ads on social media	96	92	100	97	89

Base: Did consume this type of medium in the past 30 days
Question: Q.6 Advertisements can have different goals. Can you indicate, for each of the following types of advertisements, for which advertising goals they are suitable?

Reactions to digital audio ads are really positive compared to other digital formats

Advertising Attributes - indices

Ads on internet radio are perceived as inspirational, useful, playful and they keep people up to date on promotions. They yield more benefits than online videos, banners or FM radio

	Gives inspiration	Useful	Keeps me up to date	Playful	Disturbing*	Too much ads*	Annoying*	Relevant	Surprising	Credible
Internet radio	131	123	120	121	96	95	96	113	108	109
Podcasts	114	94	97	118	107	97	101	107	111	112
Music Streaming	96	87	91	94	106	97	115	94	96	97
Mobile Games	95	91	83	101	112	106	113	96	101	83
Social Media	89	83	85	81	109	108	105	87	81	78
Online Videos	87	84	74	93	116	110	114	93	97	89
FM Radio	86	105	121	101	95	105	95	100	98	112
Banner on Websites	76	74	91	69	114	107	109	86	78	79

35-54 yo

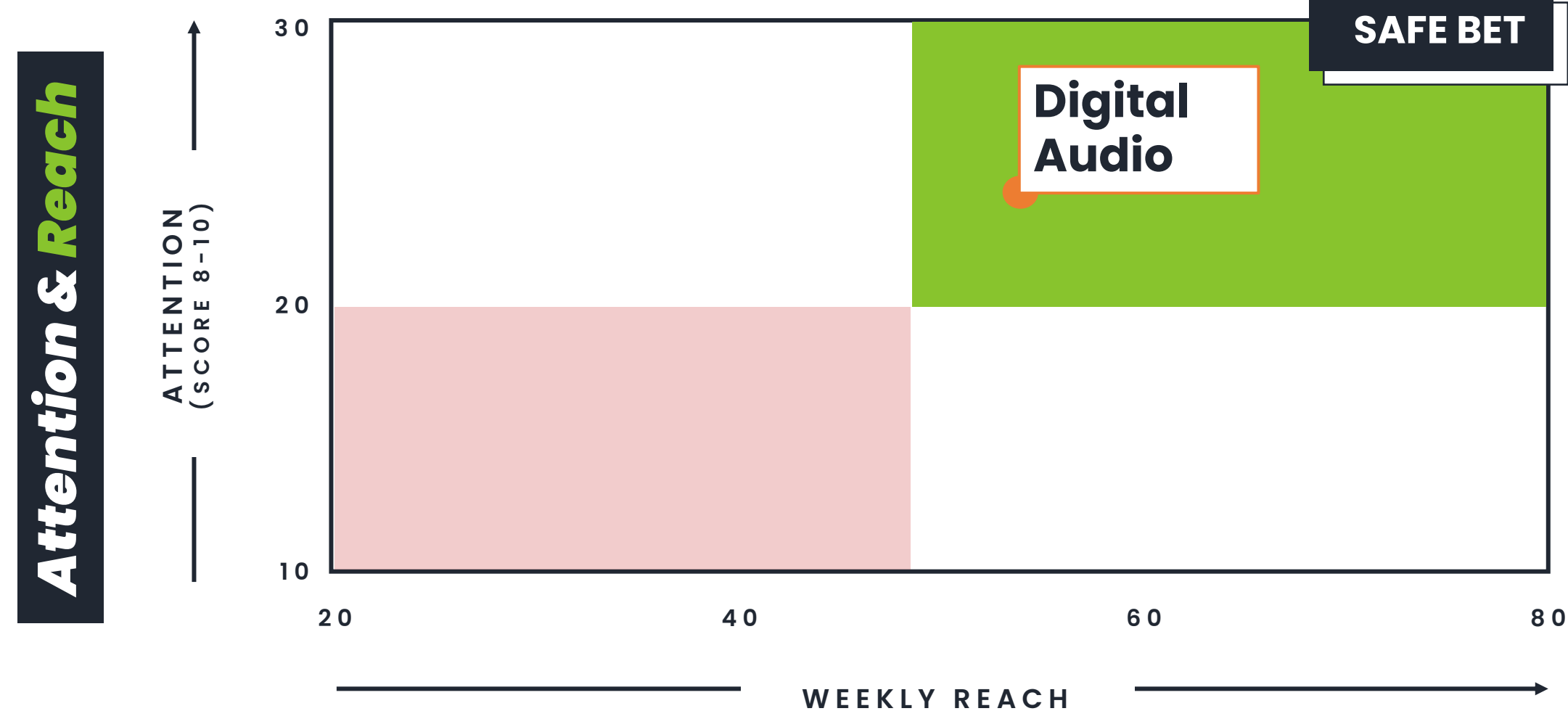
Ads in podcasts score better within 35-54 age group, confirming their potential combined with high attention value

Podcasts 34-54 yo	119	94	101	102	89	103	123	126	124	105
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Recommendation : digital audio must now become a mainstream investment in your media mix

The days when it was part of an innovation budget are over.

Whilst reach is now really strong, the exceptional level of attention means your campaigns need **less repetition** compared to other medias



The opportunities for **visibility** are huge given how **underinvested** this media remains

- Used by **1%** of advertisers*
- 4 times less** advertisers than in FM radio in 2021**
- 0,6%** of digital advertising budget***

*Nombre d'annonceurs Audio Digital vs Annonceurs tous médias 2021 / Source : Baromètre unité du marché publicitaire / <http://francepub.fr/pdf/BUMP-2022.pdf>
**Nombre d'annonceurs Audio Digital vs annonceurs radio / Source : Baromètre unité du marché publicitaire
***Source : baromètre de l'audio digital Kantar T1 2022

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GAME CHANGERS

