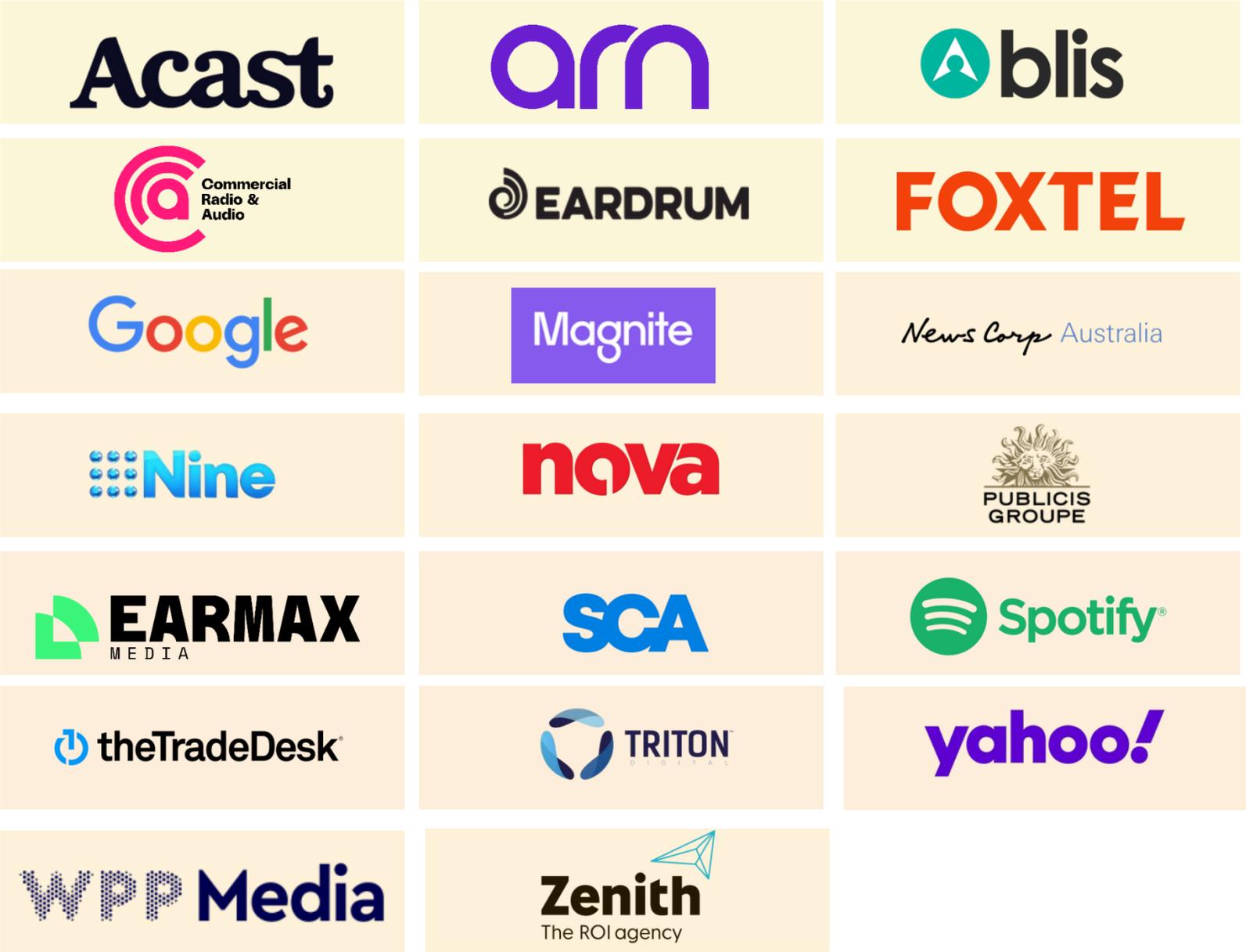wave 10 | february 2026

audio advertising
state of the nation report

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iab australia thanks the following organisations for their support in this study.

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SCA

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theTradeDesk

TRITON

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WPP Media

Zenith The ROI agency

contents

01. introduction & background

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introduction

Now in its 10th annual wave, the Audio Advertising State of the Nation Report is a long-running collaborative industry study providing a decade of insight into advertisers' investment plans in digital audio. It examines key trends, emerging opportunities, and the complementary role audio plays within broader media strategies, while also helping the IAB Audio Council prioritise industry education and initiatives.

Investment in digital audio continues to grow as advertisers follow audiences into streaming music and podcasts and seek high-attention, brand-safe environments that deliver meaningful engagement.

Looking ahead, the future for digital audio advertisers is increasingly compelling. As the channel scales within the media mix, advances in targeting, dynamic creative, and experimentation with content creators are making audio campaigns more relevant, accountable, and effective—deepening connections with audiences and building trust at scale.

The inaugural Audio State of the Nation survey marked a milestone, bringing traditional and streaming radio players together for the first time. Ten years later, the undeniable growth of audio advertising investment confirms the industry's shift; what was once an emerging market is now a powerhouse.

However, growth has brought complexity. A decade of evolution in digital audio advertising formats and audience fragmentation has intensified measurement challenges, making it harder for advertisers to prove cross-platform impact. As we navigate 2026, the industry faces a dual reality: AI disruption—which advertisers view as a prime opportunity for digital innovation—and a heightened demand for accountability.

In today's cost-conscious environment, the pressure to link audio exposure to business outcomes is paramount. Advertisers must also continue to balance scale with brand safety, creative effectiveness, and privacy-compliant data use. This 10th-anniversary report provides independent research on ad buyers intentions and expectations for harnessing the enduring power of digital audio.

Steve Golding
Head of Audio Automation
NOVA Entertainment
Co-chair, IAB Audio Council

Gai Le Roy
CEO
IAB Australia

digital audio ad market

digital audio and podcast advertising increased 8.2% year on year

CY 2024 to CY 2025

calendar year 2025 total audio expenditure by category

40%

60%

■ Audio Podcast ■ Audio Streaming
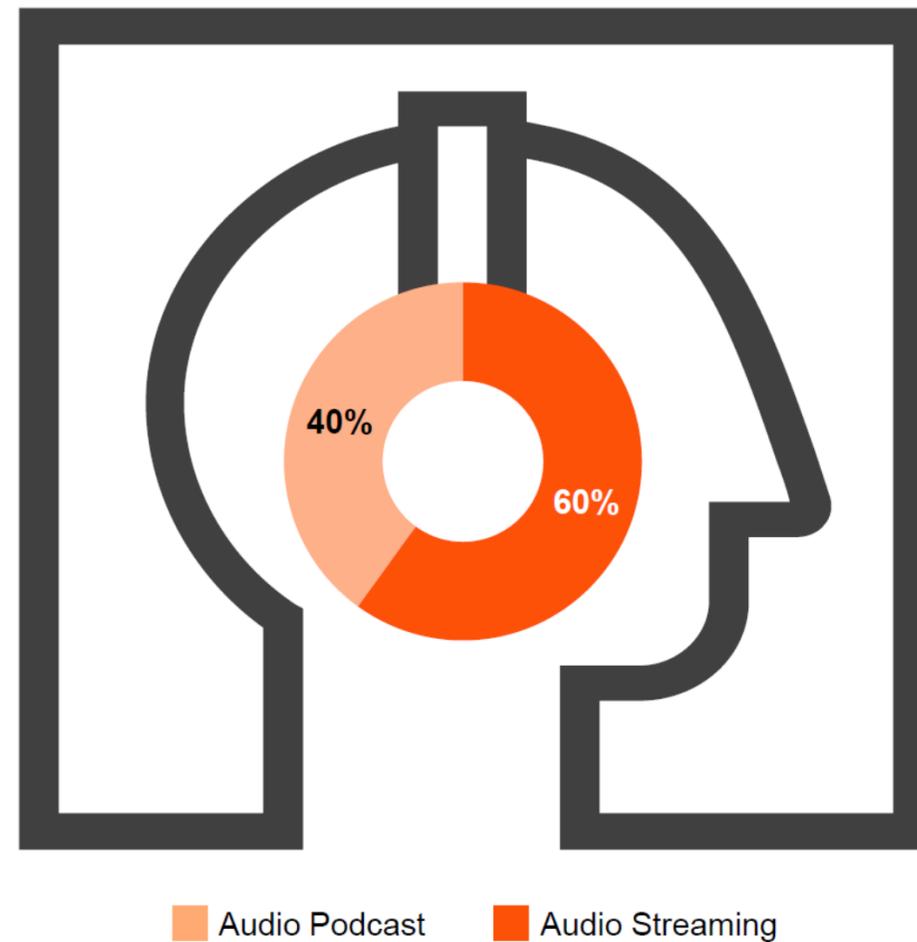
The total Australian internet audio advertising market in 2025 was

$339m

representing

4.5%

of total 2025 General Display advertising expenditure*

$134m
Podcast advertising expenditure

$205m
Streaming advertising expenditure

digital audio ad market

podcast and streaming audio advertising expenditure, by calendar year
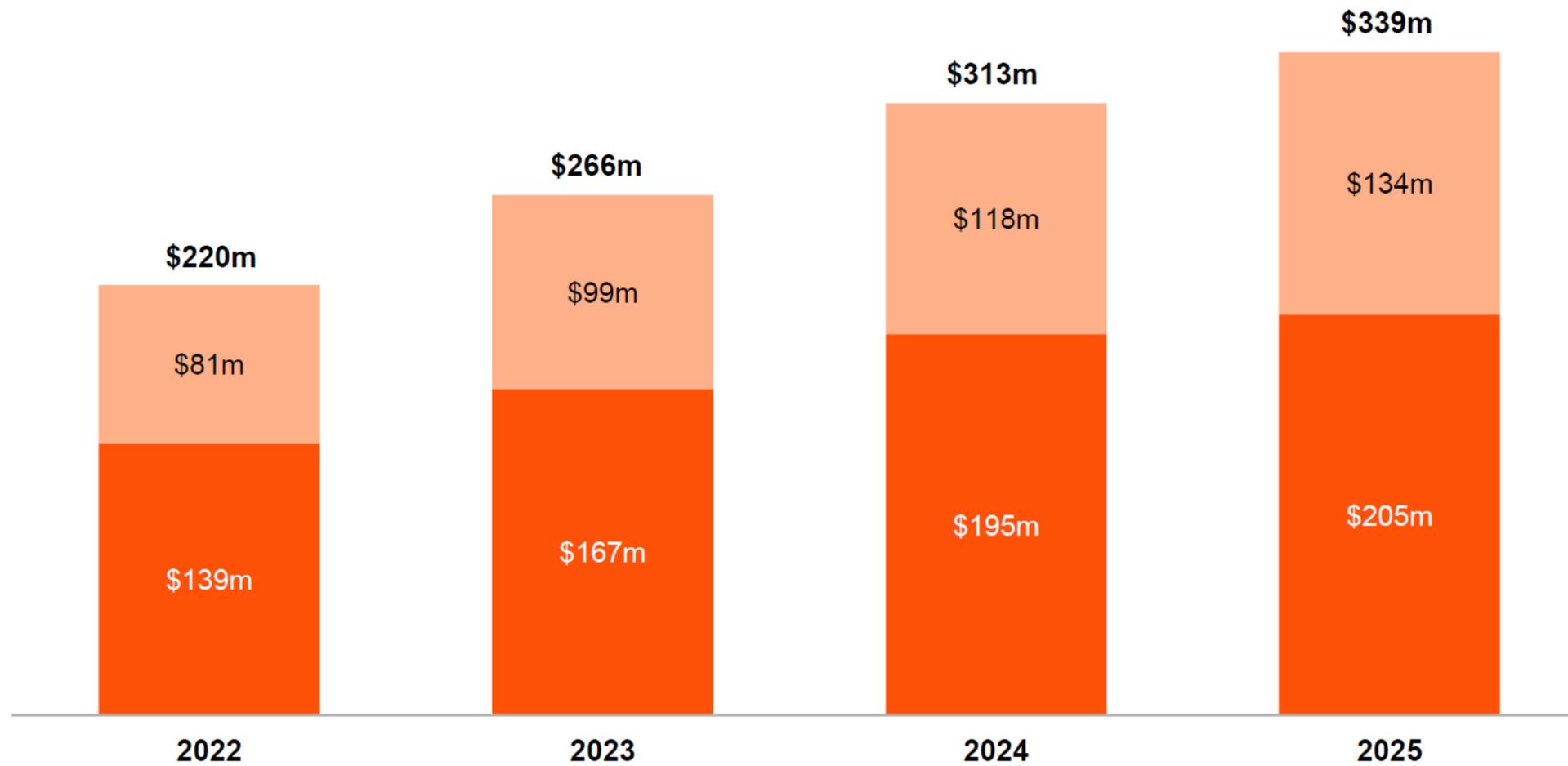
Total Audio

+8.2% on 2024

Podcast

+13.5% on 2024

Streaming

+5.0% on 2024

	2022	2023	2024	2025
Total	$220m	$266m	$313m	$339m
Streaming	$81m	$99m	$118m	$134m
Podcast	$139m	$167m	$195m	$205m

background

Understanding the experience of marketers and agencies with **digital audio advertising**

- 128 survey responses were collected from the advertising buy-side including from media, creative and digital advertising agencies, agency trading desks and brands/companies that buy advertising.

  - Respondents are decision makers or influencers in the allocation of marketing spend and either placed or planned audio advertising campaigns.
  - 95% of respondents are from ad agencies and 5% from brands/companies that buy advertising.
  - Agency respondents represent large agencies from holding groups (68% of agencies surveyed) and smaller independent agencies (32% of agencies survey).

- This study was conducted in November/December 2025.

- This is the 10th 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 Australia website.

The survey covers usage and attitudes to advertising in streaming music and radio, and podcasts original content and catch-up radio.

executive summary

The *IAB Australia Audio Advertising State of the Nation* annual industry survey in its 10 wave, reflects a maturing and evolving market with clear growth intent and expanding use cases, however measurement barriers persist.

Digital audio advertising continues to grow strongly. Digital audio and podcast advertising expenditure increased 8% year on year from CY24 to CY25 with growth in podcast advertising expenditure accelerating.

Looking ahead to 2026, ad buyers signal further increases in digital audio investment. Nearly seven in ten respondents plan to increase spend in original content podcast advertising, while over half plan to increase investment in streaming music advertising.

Audience attention and engagement has risen to become the number one reason for investment. Access to talent and content creators has increased significantly as a driver, alongside growing emphasis on brand building, brand integrations and custom executions. At the same time, digital audio's role in delivering incremental reach alongside other media has weakened as a primary driver this year.

Programmatic audio buying remains stable, with data and targeting once again the dominant drivers of programmatic investment. Guaranteed and private marketplace deals are increasingly favoured for both streaming audio and podcast advertising.

There is potential growth in investment in sponsorships or custom integrations in 2026, along with buying audio in combination with other media extensions such as video, social or events.

Creative formats remain anchored in recorded spots and host-read ads, which continue to be the most widely used podcast formats. Video podcasts are emerging as an area of experimentation, with most respondents having considered the format and one quarter already including it in campaigns. Experimentation with podcast creators and talent is significant, with the majority of respondents either already using or actively considering creator-led approaches

Measurement remains both a priority and a constraint. Campaign delivery, audience metrics and brand lift studies are the most commonly used tools, while market mix modelling has become the leading method for assessing sales impact and ROI. Fragmentation and lack of standardisation—particularly around audience data and podcast measurement—are cited as the top challenges limiting confident planning and evaluation and remain key barriers to audio becoming a larger share of ad spend.

AI is viewed as a major opportunity to improve planning, activation and especially performance reporting and analysis. Australian ad buyers are far more comfortable using AI in advertising optimisation than in audio content production, particularly for host reads or voice cloning, where concerns around authenticity remain high.

The digital audio market is growing, innovating and broadening its strategic role, but the future scale depends heavily on improved measurement standardisation, clearer evidence of effectiveness, and responsible adoption of new technologies such as AI to scale and unlock further investment.

02. audio advertising planning & buying

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ad buyers plan to at least slightly increase investment in some digital audio ad formats in 2026

audio investment plans for 2026

69% of respondents plan to at least slightly increase original content audio podcast ad investment.

56% of respondents plan to at least slightly increase streaming music ad investment.

audio investment plans for 2026

	No plans to use
	Invest for the first time
	Decrease
	Remain the same
	Increase slightly
	Increase significantly

Broadcast radio (AM/FM): 5%, 0%, 15%, 58%, 20%, 2%
DAB+ only radio stations: 12%, 1%, 15%, 59%, 12%, 2%
Streaming AM/FM/DAB+ Radio: 7%, 2%, 7%, 43%, 37%, 4%
Streaming Music: 6%, 2%, 6%, 31%, 47%, 9%
Audio Podcasts (Original content): 6%, 1%, 3%, 21%, 54%, 15%
Audio Podcasts (Catch Up radio content): 16%, 0%, 2%, 34%, 42%, 6%
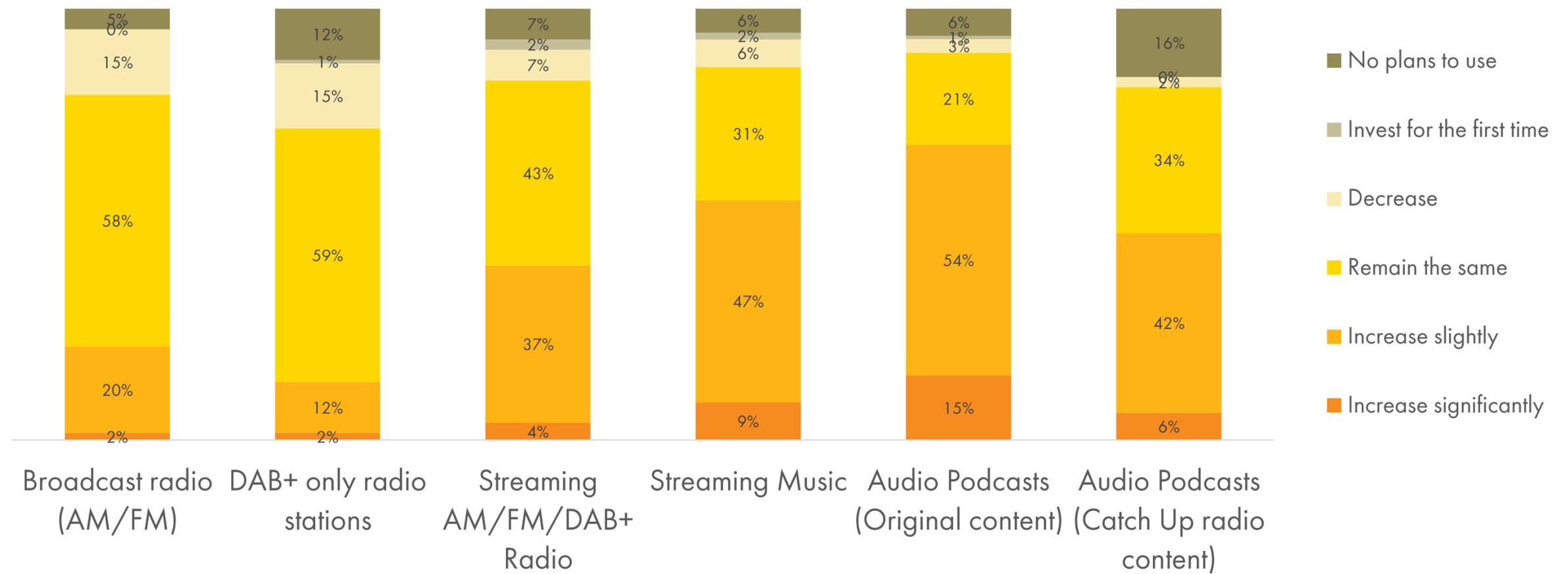
access to talent and content creators is increasingly a key driver for investment in digital audio

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Audience attention and engagement has increased year on year (up 6% pts) to be the #1 driver for using digital audio advertising this year.

Access to talent and content creators has increased significantly year on year (up 10% pts) to become one of the key drivers for investment in digital audio advertising.

Usage for brand building capabilities (+9% pts) and brand integrations/custom executions (+8% pts) have also continued to increase.

Digital audio's role in combination with other media (incremental reach and complementing the media mix) has weakened as a driver for usage this year.

key drivers for using or recommending digital audio advertising

Driver	%
Audience attention and engagement	56% ⬆
Access to talent and content creators	51% ⬆
Incremental reach on other media	47% ⬇
Quality content environments	44%
Complements media mix	44% ⬇
Targeting efficiencies	42%
Brand integrations and custom executions	40% ⬆
Brand storytelling capabilities	37%
Brand building capabilities	31% ⬆
Trusted brand-safe environments	27%
Automation/programmatic capabilities	26%
Competitive pricing	25%
Sales/ROI	20%
Access to ad creative production	14%
Innovative ad offerings	12%

on balance in 2026, slightly more spend on performance advertising is planned, rather than brand

37% of respondents plan to at least slightly increase the share of spend on performance advertising compared to brand in 2026, with 27% of respondents expecting to at least slightly increase the share of spend on brand.

I would like t see an incremental study that assesses sales results driven by audio. Alot of marketers are concerned about sales results at the moment rather than brand uplift. Radio and digital audio are often thought of as awareness builders. If there is a study done on the sales uplift with proven results that would help change the perception.
- Media Planner / Buyer

expected changes in share of spend on performance advertising compared to spend on brand advertising for digital audio in 2026

	%
Significantly more on performance advertising	5%
Slightly more on performance advertising	32%
No change in share of performance and brand	30%
Slightly more on brand advertising	20%
Significantly more on brand advertising	7%
Don't know/not sure	6%

audio advertising state of the nation report wave 10 2026

Q- Thinking about your streaming audio and podcast advertising investments in 2026, how will your share of spend on performance advertising change compared to your share of spend on brand advertising? All respondents n=128

14

expected growth in buying audio sponsorship, custom integration and in combination with other media extensions
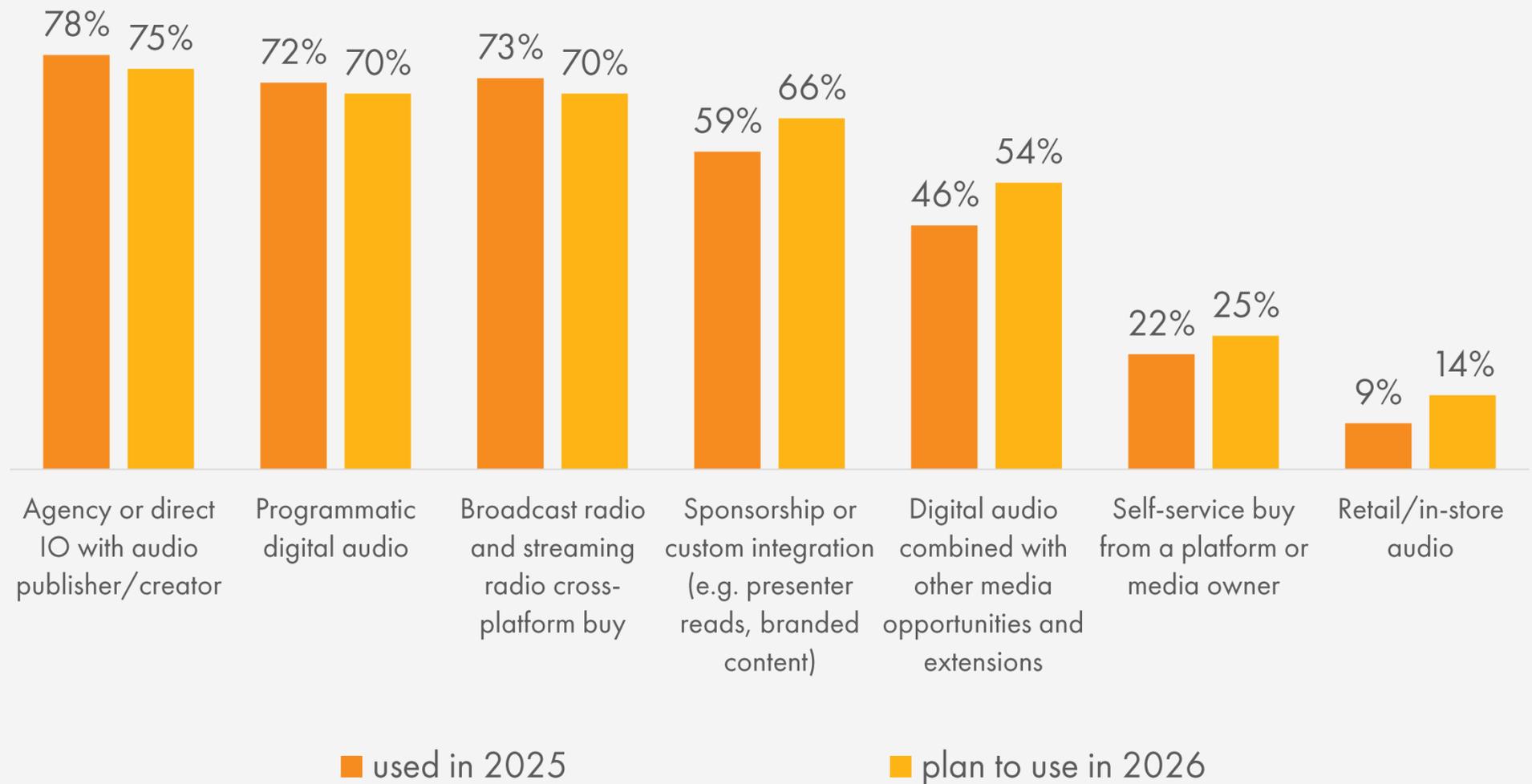

Two-thirds of respondents plan to use audio advertising sponsorship or custom integration (e.g. presenter reads, brand mentions, branded content) in 2026, compared to 59% buying in 2025 (up 7% pts).

Over half (54%) intend to buy digital audio combined with other media opportunities and extensions (e.g. video, social, events, competitions) in 2026, compared to 46% buying in 2025 (up 8% pts).

There is also greater intention to use self-service buying and retail / instore audio advertising in 2026 compared to current 2025 usage.

usage and plans to use types of audio ad buying

	used in 2025	plan to use in 2026
Agency or direct IO with audio publisher/creator	78%	75%
Programmatic digital audio	72%	70%
Broadcast radio and streaming radio cross-platform buy	73%	70%
Sponsorship or custom integration (e.g. presenter reads, branded content)	59%	66%
Digital audio combined with other media opportunities and extensions	46%	54%
Self-service buy from a platform or media owner	22%	25%
Retail/in-store audio	9%	14%

Q- Which of the following types of audio buys have you used in 2025? Please select all that apply.
Q - Which of the following types of audio buys are you planning to use in 2026? Please select all that apply.
Note: some questions options have been changed on previous surveys. All respondents n=128

audio programmatic buying remains stable on last year with 72% buying programmatically (up from 63% in 2023)

streaming audio

Amongst those buying digital audio programmatically in 2025, 55% bought streaming audio in a private marketplace deal. Amongst those intending to buy programmatically in 2026, 68% intend to buy streaming audio guaranteed deal.

	Open exchange	Private marketplace deal	Guaranteed deal
used in 2025	44%	55%	51%
plan to use in 2026	52%	61%	68%
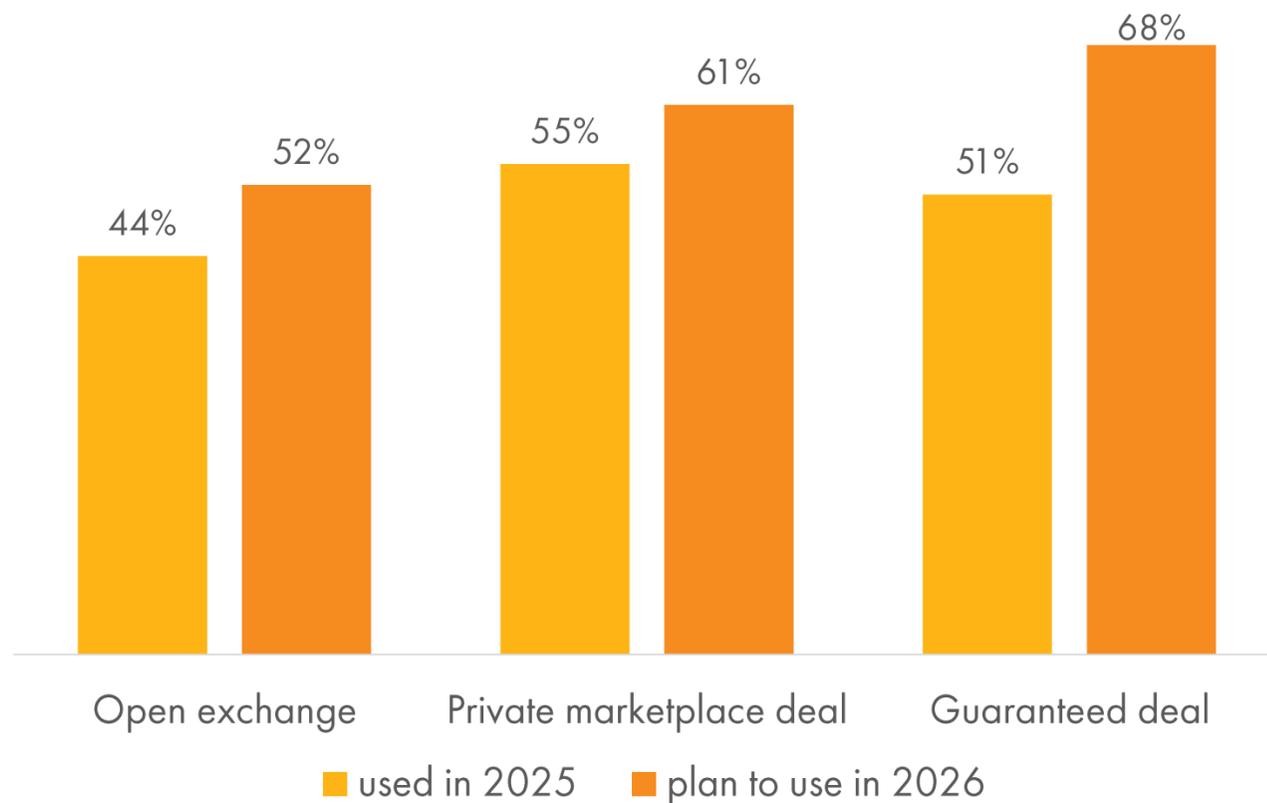
podcast

Amongst those buying digital audio programmatically in 2025, all forms of programmatic buying were used equally for podcasts. Amongst those intending to buy programmatically in 2026, 62% plan to buy podcast advertising guaranteed deal.

	Open exchange	Private marketplace deal	Guaranteed deal
used in 2025	43%	42%	43%
plan to use in 2026	41%	59%	62%

Q -Which types of programmatic audio have you used in 2025? (Please select all that apply)
Q - Which types of programmatic audio are you planning to use in 2026? (Please select all that apply)
All respondents n=128 (amongst the 72% used programmatic in 2025 and 70% planning to use programmatic in 2026)

data and targeting dominates the reasons to buy programmatic audio
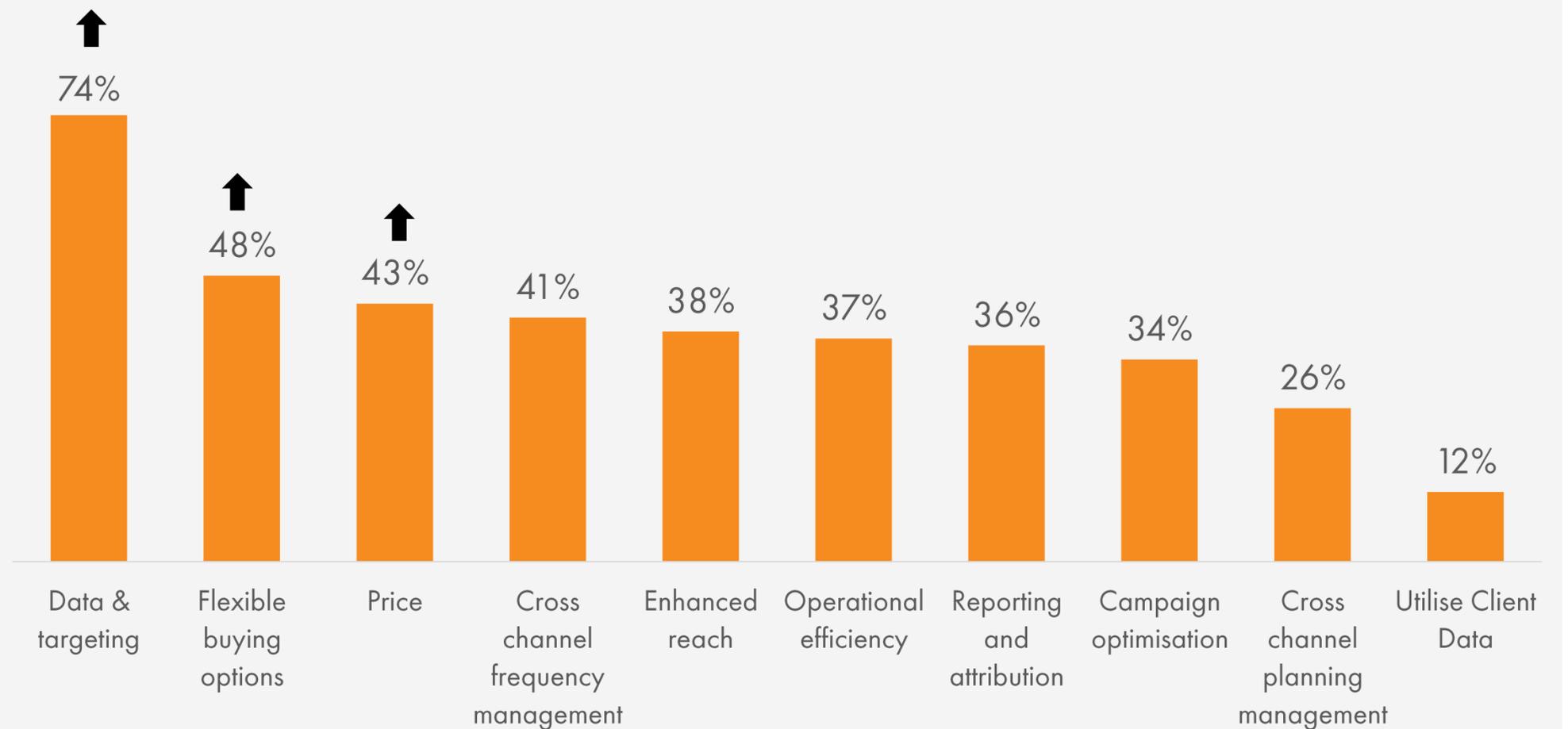
A combination of elements factor into the decision to buy digital audio programmatically.

After a drop last year, data and targeting has returned to be the clear #1 driver for buying digital audio programmatically.

Flexible buying options and price have also increased as reasons to buy programmatic audio this year.

"The biggest impact for the audio industry would come from making digital audio fully accessible programmatically with clear transparency."
- Agency Director

factors in buying programmatic audio amongst those buying programmatically

Data & targeting	Flexible buying options	Price	Cross channel frequency management	Enhanced reach	Operational efficiency	Reporting and attribution	Campaign optimisation	Cross channel planning management	Utilise Client Data
74%	48%	43%	41%	38%	37%	36%	34%	26%	12%

Q- For your programmatic audio buying which of the following have been key factors in your decision to buy via programmatic? Please select all that apply.
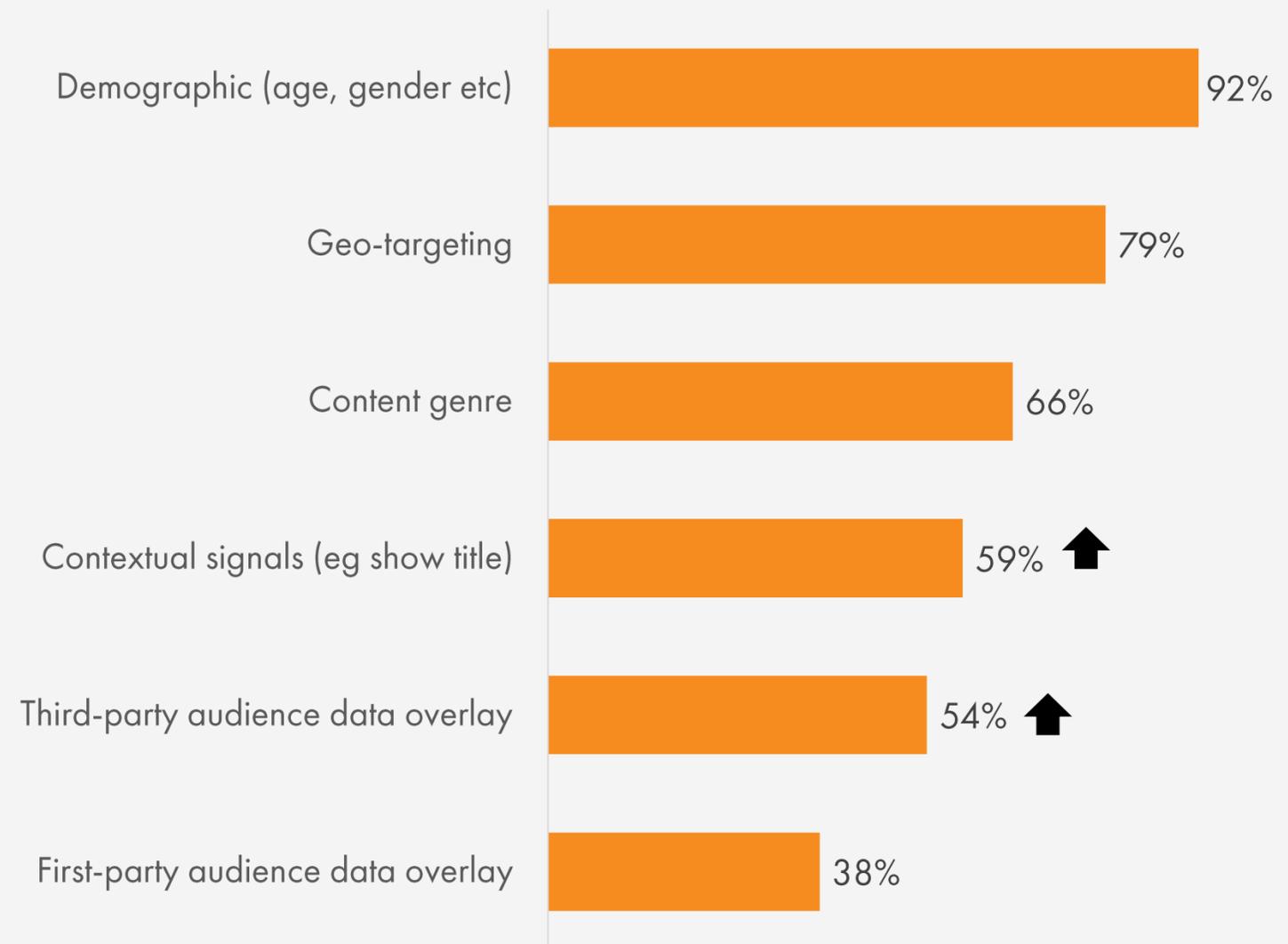All respondents n=128 (amongst the 72% used programmatic in 2025)

demographic and geographic audience targeting is most used when buying digital audio

Demographic and location continue to be the most used audience targeting when purchasing streaming audio or podcast advertising.

The usage of contextual signals (+9% pts) and third-party data overlay (+8% pts) have increased year on year.

audience targeting types used when buying digital audio advertising

Audience targeting type	%
Demographic (age, gender etc)	92%
Geo-targeting	79%
Content genre	66%
Contextual signals (eg show title)	59% ⬆
Third-party audience data overlay	54% ⬆
First-party audience data overlay	38%

Q- Which of the following audience targeting types have you used when purchasing streaming audio (music or radio) or podcast advertising?
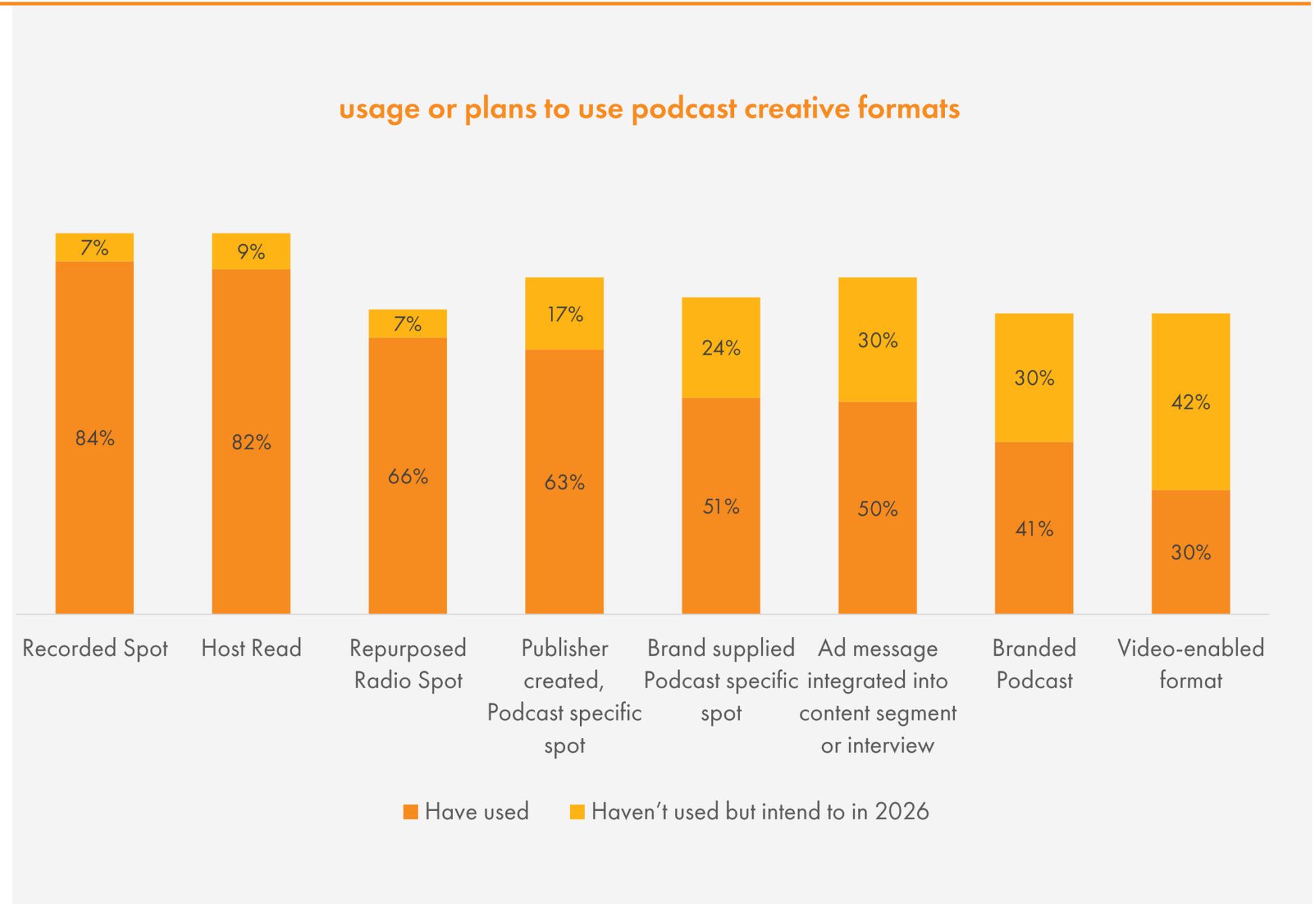All respondents n=128

03.
audio creative formats

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recorded spots and host read ads reinforced as most used podcast formats

Recorded spots and host read podcast ads remain the most used podcast creative formats, both increasing in usage by 5% pts on last year.

There is high appetite again this year to try video-enabled and branded podcasts in 2026, however similar high intention last year did not translate into higher usage in 2025.

usage or plans to use podcast creative formats

	Recorded Spot	Host Read	Repurposed Radio Spot	Publisher created, Podcast specific spot	Brand supplied Podcast specific spot	Ad message integrated into content segment or interview	Branded Podcast	Video-enabled format
Haven't used but intend to in 2026	7%	9%	7%	17%	24%	30%	30%	42%
Have used	84%	82%	66%	63%	51%	50%	41%	30%

■ Have used ■ Haven't used but intend to in 2026

Q- Which of the following creative formats have you used/or plan to use for audio advertising on Podcasts?
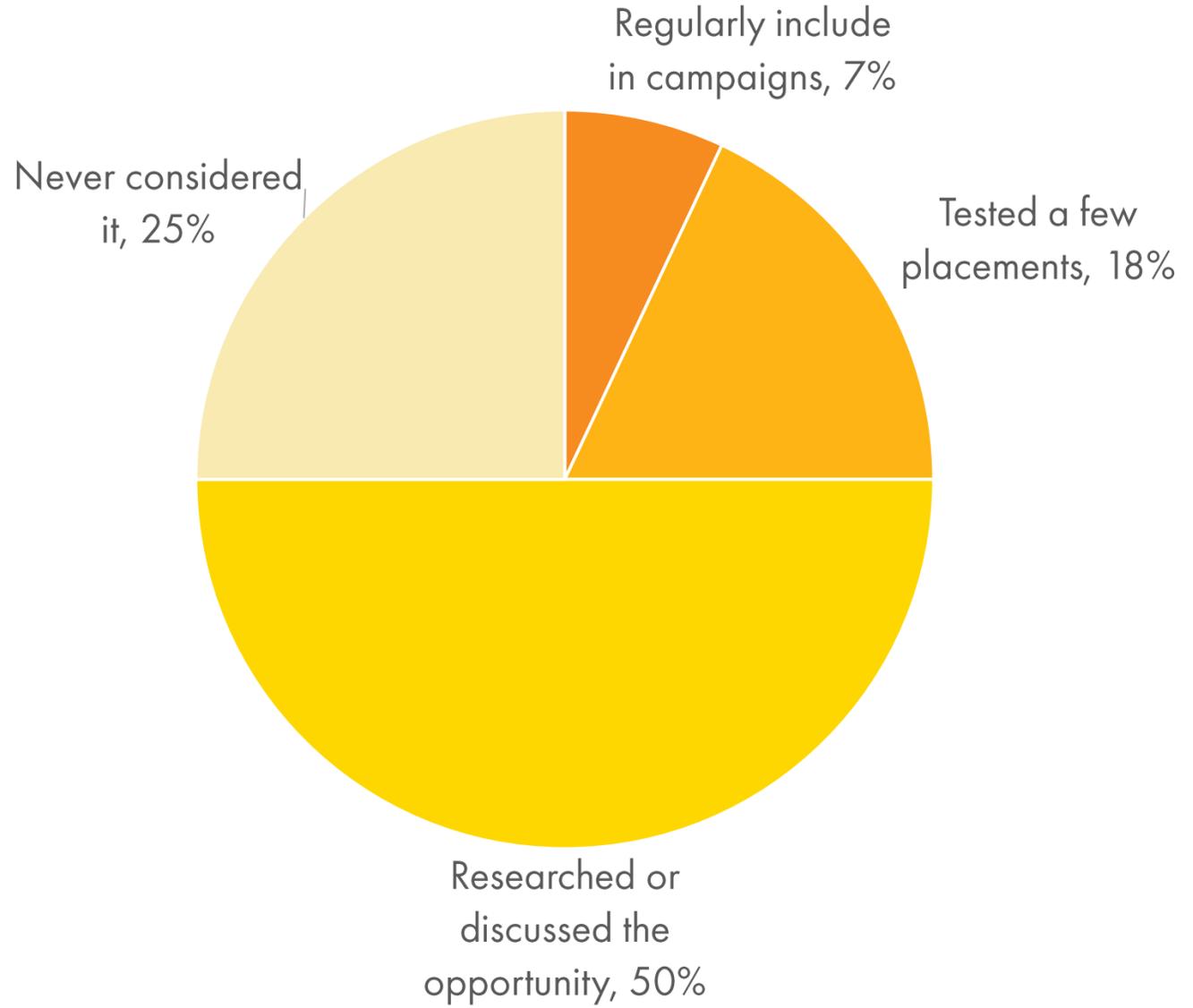All respondents n=128

25% of respondents have placed ads in video podcasts

placing ads in video podcasts

Most respondents have had some consideration of placing ads in video podcasts, with half researching the opportunity and 25% including the format in campaigns.

experience placing ads in video podcasts

Regularly include in campaigns, 7%

Tested a few placements, 18%

Researched or discussed the opportunity, 50%

Never considered it, 25%

significant levels of experimentation with using podcast creators and talent as part of a creator marketing strategy
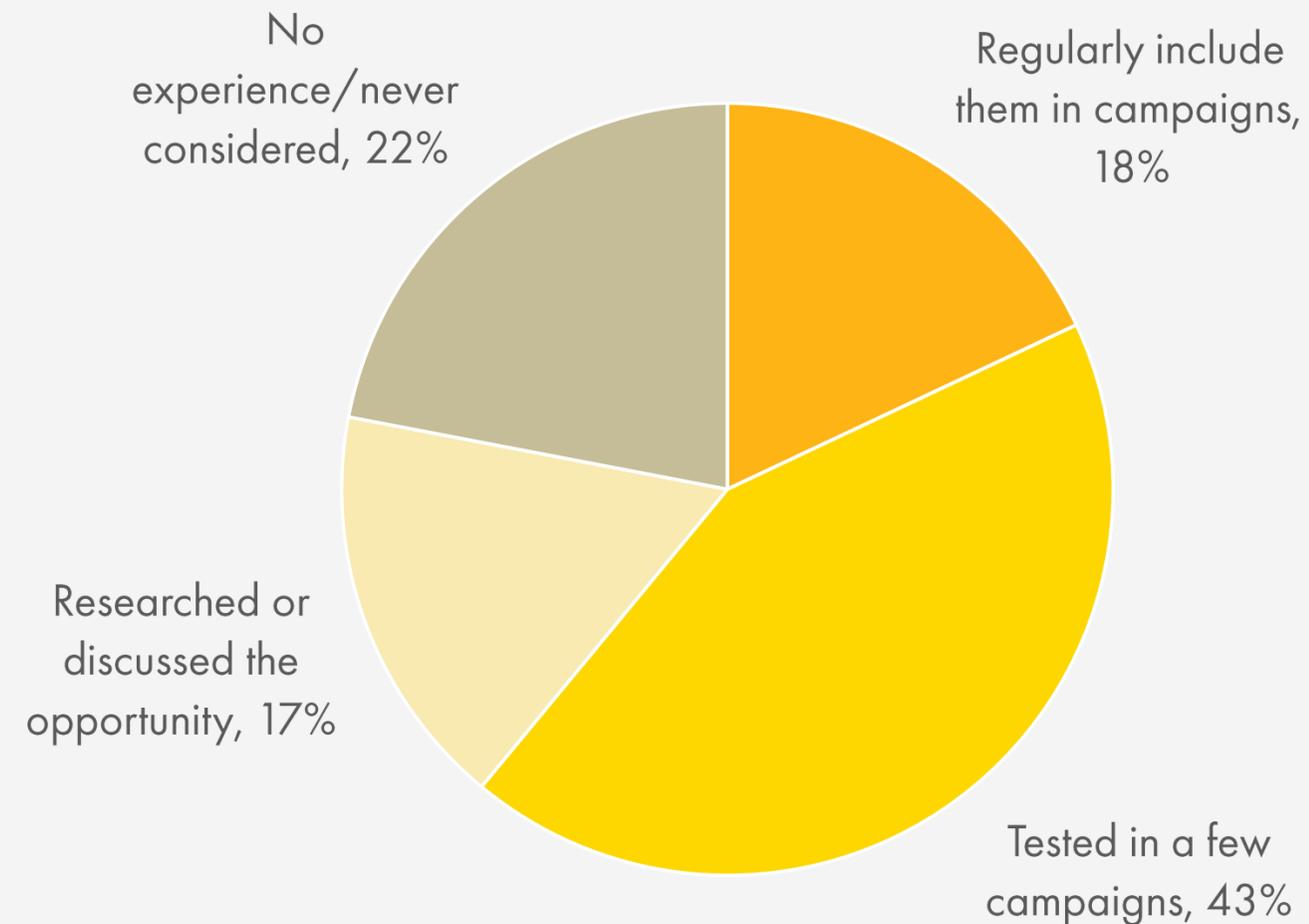
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6 in 10 respondents (61%) of respondents have experience using podcast creators and talent as part of their creator marketing strategy, with a further 17% considering the opportunity.

US Creator Economy ad investment is expected to continue to grow*

After more than doubling from 2021-2024, US Creator Economy ad spend will climb 26% in 2025 to $37B. Ad spend in the U.S. Creator Economy in 2025 will grow at a rate four times faster than the media industry overall (+5.7%)*.

Spend includes direct partnerships brands have with creators, paid amplification of those partnerships, as well as content adjacencies (advertising on any channel adjacent to creators where advertiser does not have a direct partnership).

Experience using podcast creators and talent as part of creator marketing strategy

No experience/never considered, 22%

Regularly include them in campaigns, 18%

Researched or discussed the opportunity, 17%

Tested in a few campaigns, 43%

Q- What best describes your experience in using podcast creators and talent as part of your creator marketing strategy? (Please select one response only)
All respondents n=128

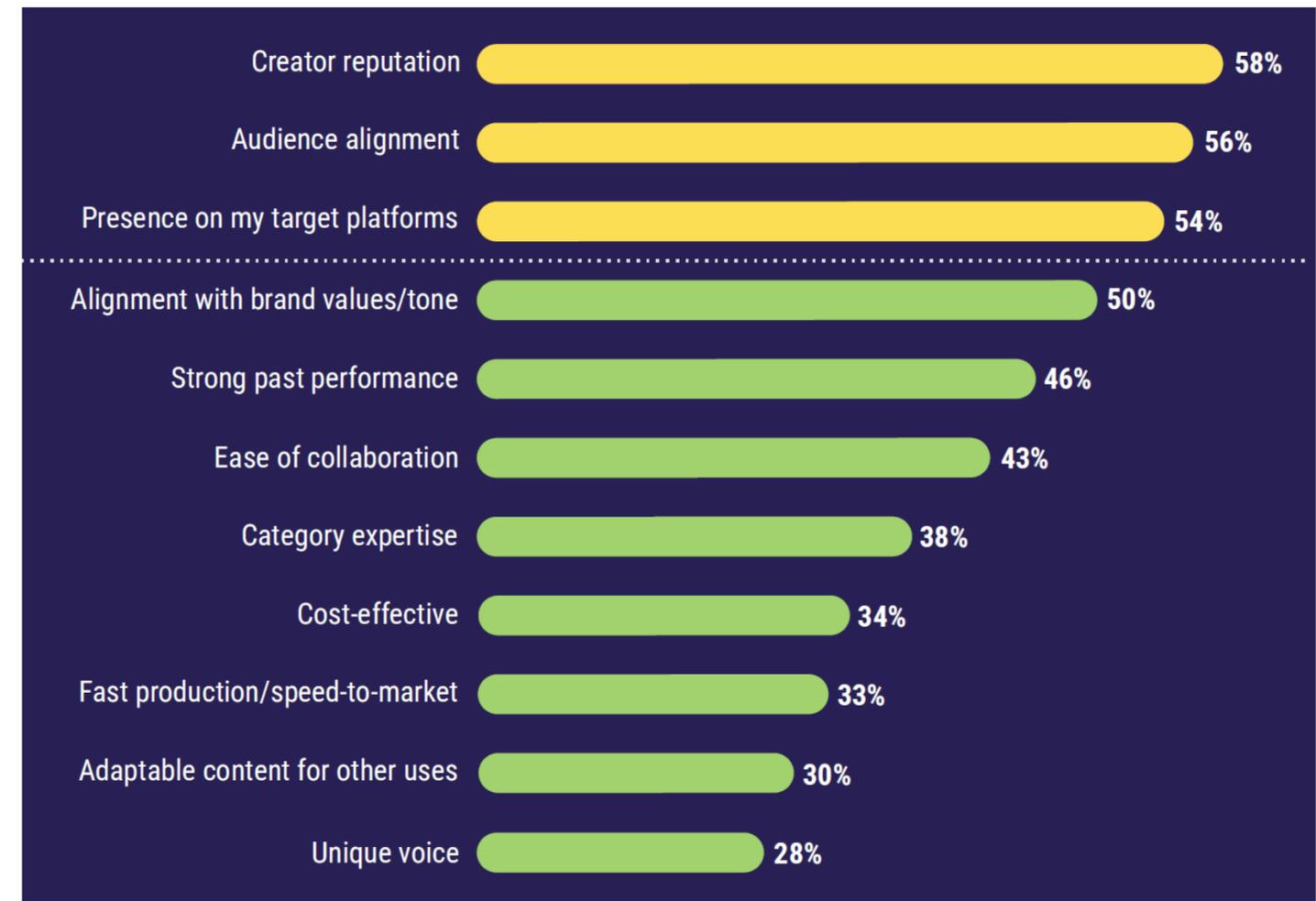# US ad buyers are using creator marketing for brand building, but the right creator is key and the top challenge

Top goals/objectives for creator marketing
(% US ad buyers selected as top 3 goals)

● Start-of-Journey ● Mid-Journey ● End-of-Journey

Goal	%
Building brand awareness	43%*
Reaching new audiences	41%
Enhancing brand reputation/trust	35%
Driving online sales/conversions	32%
Increasing consideration	32%
Increasing social media engagement	30%
Generating leads	27%
Driving offline sales/conversions	19%
Driving website traffic/engagement	18%
Driving in-store foot traffic/engagement	16%

Criteria used when selecting creators
(% US ad buyers selected as very important)

Criteria	%
Creator reputation	58%
Audience alignment	56%
Presence on my target platforms	54%
Alignment with brand values/tone	50%
Strong past performance	46%
Ease of collaboration	43%
Category expertise	38%
Cost-effective	34%
Fast production/speed-to-market	33%
Adaptable content for other uses	30%
Unique voice	28%

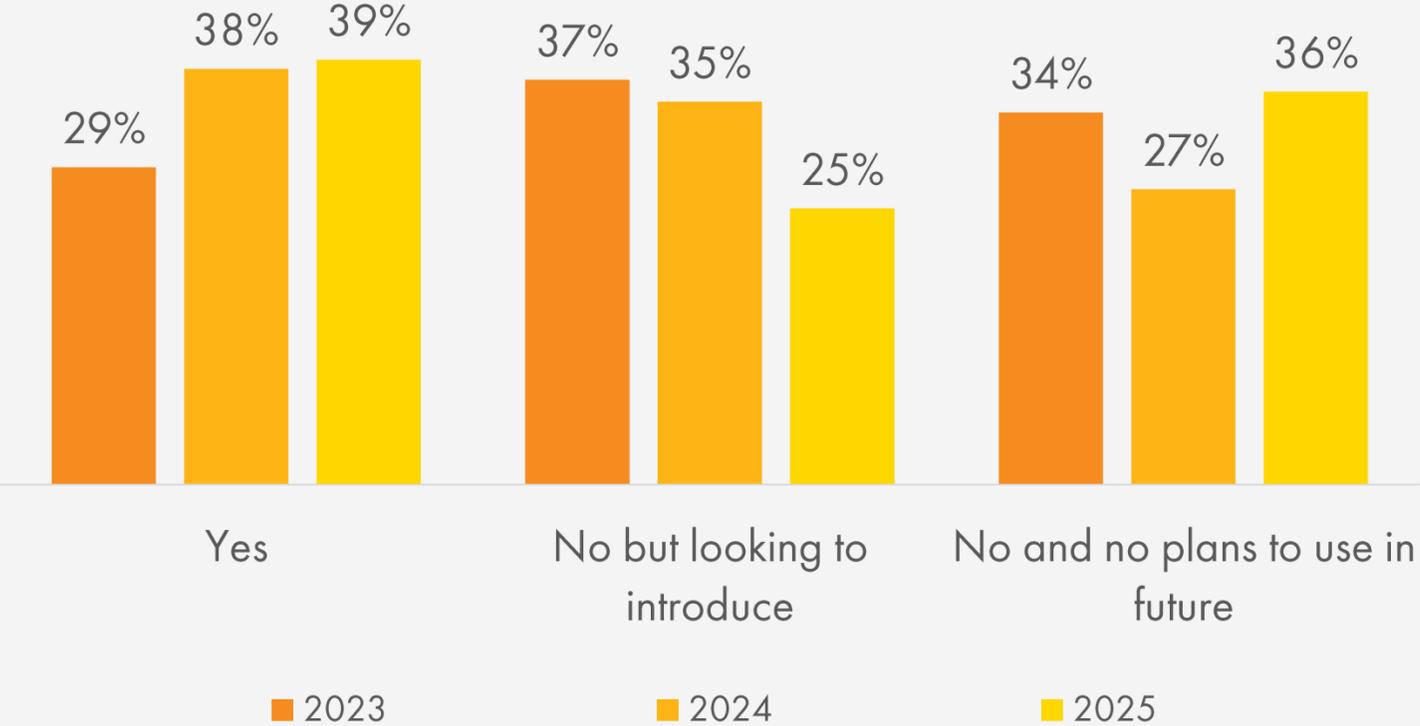Source; IAB US 2025 Creator Economy Ad Spend & Strategy Report

usage of sonic branding

Consistent usage of sonic branding has been maintained.

Brand building is the predominant objective for digital audio campaigns, and the strategic use of music, voice and sound to articulate a brand creates an emotional impact, and with consistency can make a brand more memorable. So, its worth looking to introduce sonic branding more regularly into audio campaigns.

sonic branding

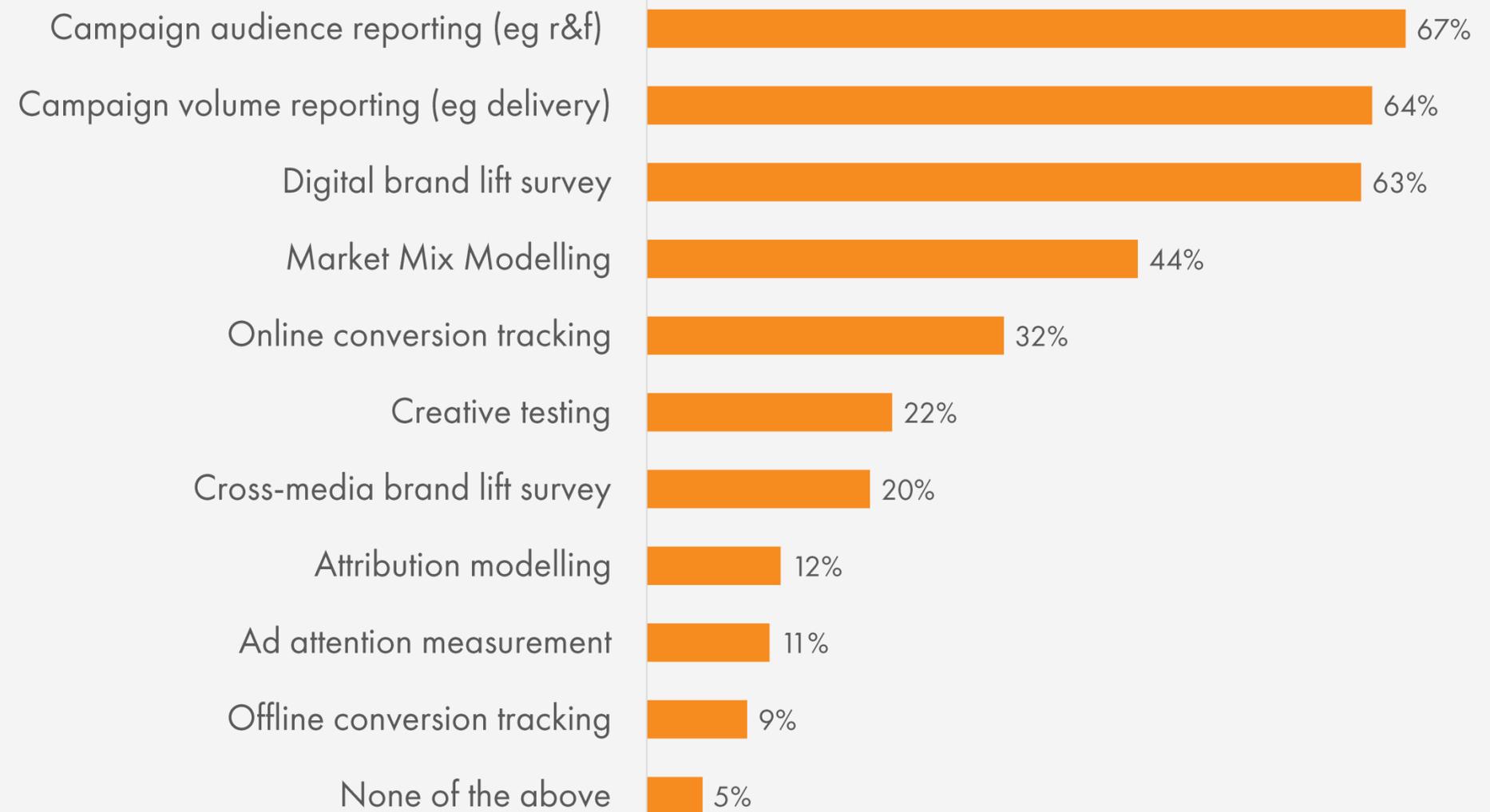39% of agencies use sonic branding consistently. Intention to introduce consistent sonic branding has dropped.

	Yes			No but looking to introduce			No and no plans to use in future		
2023	29%			37%			34%		
2024		38%			35%			27%	
2025			39%			25%			36%

■ 2023　　■ 2024　　■ 2025

Q- Does your brand or any of your client brands have and use sonic branding consistently?
All respondents n=128

04. audio advertising effectiveness

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measurement tools used to assess digital audio advertising effectiveness

Campaign audience reporting (eg reach & frequency), campaign volume reporting (eg delivery, completion, CPM) and digital brand lift surveys are the most used measurement tools to assess digital audio advertising effectiveness.

In terms of measuring sales impact and ROI of digital audio advertising, Market Mix Modelling is now the most used tool (used by 44%) followed by online conversion tracking (used by 32%).

measurement tools used to assess the effectiveness of digital audio ad investments

Tool	%
Campaign audience reporting (eg r&f)	67%
Campaign volume reporting (eg delivery)	64%
Digital brand lift survey	63%
Market Mix Modelling	44%
Online conversion tracking	32%
Creative testing	22%
Cross-media brand lift survey	20%
Attribution modelling	12%
Ad attention measurement	11%
Offline conversion tracking	9%
None of the above	5%

Q- Which of the following measurement tools do you use to assess the effectiveness of your streaming audio and podcast advertising investments? (Please select all that apply)
All respondents n=128

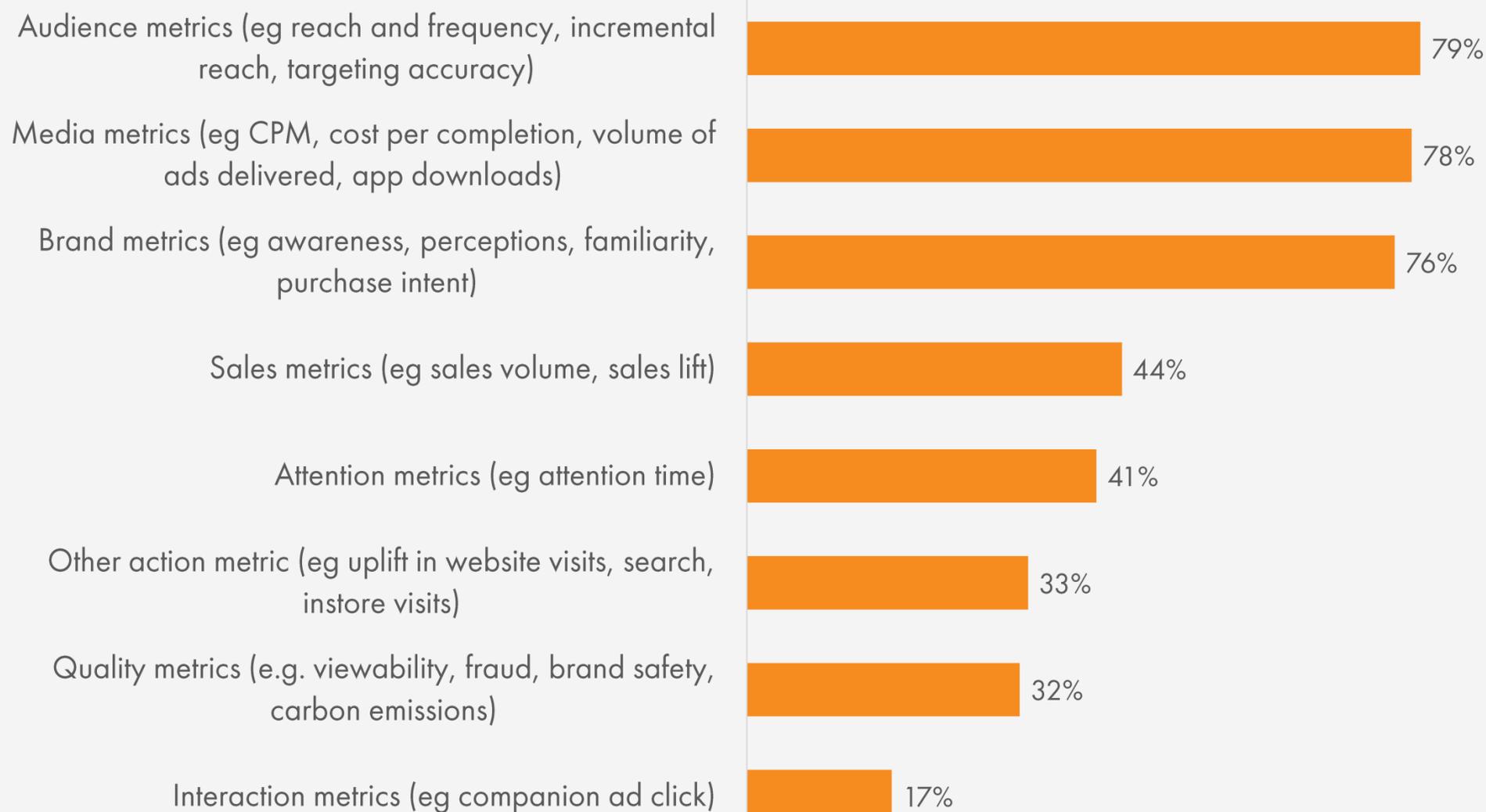# metrics important to assess digital audio advertising effectiveness

Audience, media delivery and brand metrics are the most important used to assess the effectiveness of digital audio ad investments.

Sales metrics are considered important to evaluate digital audio ad investment by 44% of respondents.

"Downloads are a poor proxy for actual listening. The industry needs standardised listen through rate, verified plays, and time spent listening. This brings audio closer to digital video measurement and makes it easier to justify budgets."
- Agency Director

metrics important to assess the effectiveness of digital audio ad investments

Metric	%
Audience metrics (eg reach and frequency, incremental reach, targeting accuracy)	79%
Media metrics (eg CPM, cost per completion, volume of ads delivered, app downloads)	78%
Brand metrics (eg awareness, perceptions, familiarity, purchase intent)	76%
Sales metrics (eg sales volume, sales lift)	44%
Attention metrics (eg attention time)	41%
Other action metric (eg uplift in website visits, search, instore visits)	33%
Quality metrics (e.g. viewability, fraud, brand safety, carbon emissions)	32%
Interaction metrics (eg companion ad click)	17%

Q- Which of the following metrics are important to evaluate your streaming audio and podcast advertising campaigns? (Please select all that apply)
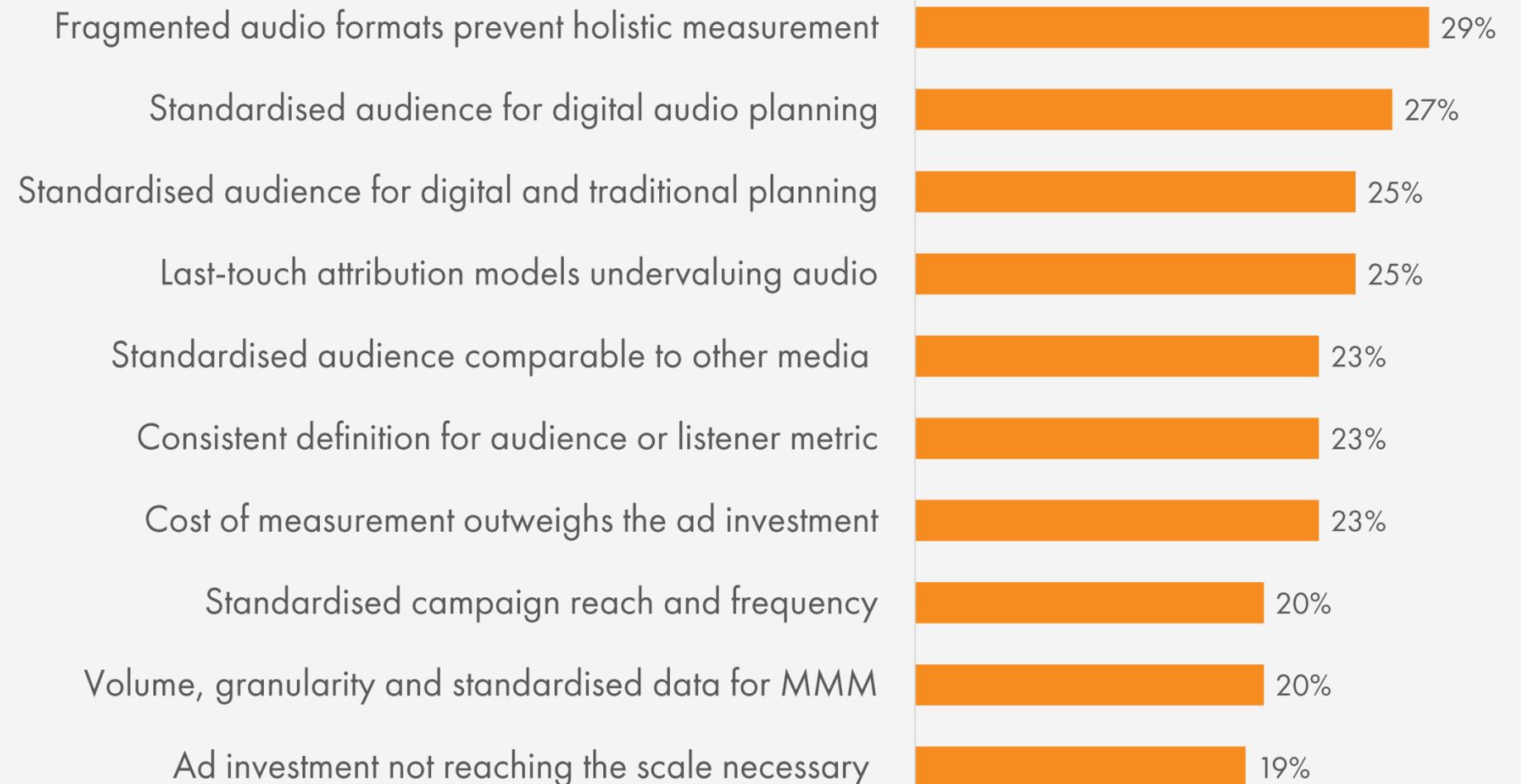All respondents n=128

fragmentation and lack of standardisation are the top measurement challenges for digital audio

Improving standardised audience data used for media planning across digital audio environments and across digital and traditional audio environments, are the key measurement challenges to address to drive growth in streaming digital audio and podcast advertising.

"The current audio landscape is highly fragmented. Listeners consume content across numerous platforms and devices (streaming music, podcasts on different apps, smart speakers, video podcasts on YouTube, etc.), and each silo often uses different tracking methods. This makes it incredibly difficult for advertisers to get a single, accurate view of campaign performance"
- Agency Director

measurement challenges in assessing effectiveness of digital audio

Challenge	%
Fragmented audio formats prevent holistic measurement	29%
Standardised audience for digital audio planning	27%
Standardised audience for digital and traditional planning	25%
Last-touch attribution models undervaluing audio	25%
Standardised audience comparable to other media	23%
Consistent definition for audience or listener metric	23%
Cost of measurement outweighs the ad investment	23%
Standardised campaign reach and frequency	20%
Volume, granularity and standardised data for MMM	20%
Ad investment not reaching the scale necessary	19%

Q- Which (if any) of the following measurement aspects have presented a challenge for planning and/or assessing effectiveness of digital audio and podcast advertising? All respondents n=128

standardisation and improved podcast measurement needed for confident planning and assessing of audio advertising

Standardised audience metrics for planning

"Standardised metrics for *reach, incremental reach, verified listens and attribution* would greatly improve planning and evaluation."

"*A common platform* for agency buyers to be able to analyse and measure audio/podcasting would be really useful. Something similar to VOZ for screens. It is very fragmented and *difficult to trust numbers when comparing.* If something like this exists then more work needs to be done to get agencies using it!"

"Downloads are a poor proxy for actual listening. The industry needs *standardised listen through rate, verified plays, and time spent listening.* This brings audio closer to digital video measurement and makes it easier to justify budgets."

Improved integration into MMM

"Standardising listener IDs and attribution methods would allow planners to track reach, frequency, and outcomes consistently. *Integrating this data into existing planning and MMM tools* would make audio performance comparable to other channels. "

"Debunk *media mix modelling which is constantly saying audio can't drive an ROI* as strong as other channels like video."

Improved podcast measurement

"Relying on things like Triton podcast ranker which doesn't *accurately represent the entire podcast market* isn't helpful in selling in this medium."

"More *transparency* on podcast listening metrics"

"*Inclusion of podcasts* in audio planning tools."

"More comprehensive and *standardised reporting for podcasts*"

Single view of campaign performance

"Listeners consume content across numerous platforms and devices (streaming music, podcasts on different apps, smart speakers, video podcasts on YouTube, etc.), and each silo often uses different tracking methods. This makes it *incredibly difficult for advertisers to get a single, accurate view of campaign performance*"

"Work towards *a 'total audio' currency as a singular data set* that deduplicates reach and mins listening across broadcast radio, digital streaming and streaming podcasts. Make it a *source of truth* for who we reach, how often and for how long. I'd love to better see reach and overlap (week and monthly) opposed to simple ranking."

Unified cross-platform measurement

"*one platform that helps us assess all podcast and streaming in conjunction with radio*"

"make the survey books more robust - are they as effective as they say they are? I buy radio every week - surveys change but not massively whereas digital listening is all over the place as per Triton podcast ranker. "

"linear/broadcast measurement is still very antiquated - diary system"

Expanding the use of shared audio IDs

"*CRA ID is a good step forward,* being vocal about this and sharing the capabilities as a channel not just the media partner will lift the market as a whole."
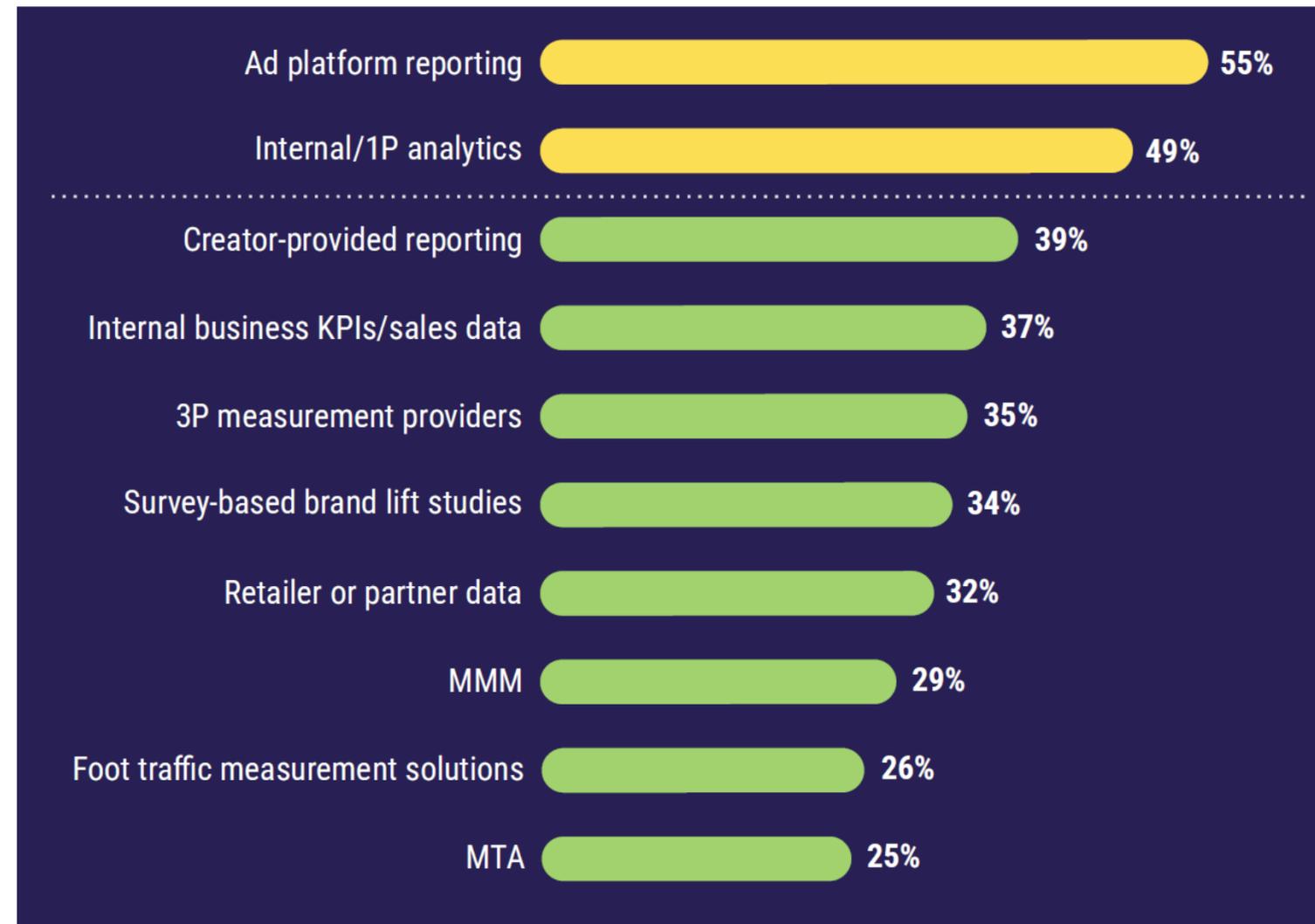
"Expanding CRA Audio ID across DSPs outside of DV360"

proving ROI is a key challenge for US ad buyers with creator marketing measurement and attribution

Top challenges with creator marketing measurement and attribution (selected as top 3 challenges amongst US ad buyers)*:

1. Proving ROI
2. Attributing sales to creators
3. Tracking long-term impact/loyalty
4. Attributing brand lift to creators
5. Incorporating creator results in MMMs

primary sources used by US ad buyers to measure creator marketing KPIs

Source	%
Ad platform reporting	55%
Internal/1P analytics	49%
Creator-provided reporting	39%
Internal business KPIs/sales data	37%
3P measurement providers	35%
Survey-based brand lift studies	34%
Retailer or partner data	32%
MMM	29%
Foot traffic measurement solutions	26%
MTA	25%

*Source; IAB US Creator Economy 2025 Ad Spend & Strategies

05.
opportunities

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measurement continues to be a key industry requirement

Evidence of effectiveness and measurement continue to be the top issues preventing streaming digital audio and podcast advertising from being a larger proportion of ad volume.

Barriers have continued to weaken on previous years, except for cost which has increased 10% pts and risen up the list of barriers over the last year.

"The most impactful thing the digital audio industry could do is standardise audience measurement across platforms so advertisers can plan, optimise and prove ROI with the same confidence they have in digital video. If we could unify attribution, allow cross platform frequency control and deliver genuine incremental reach visibility"
- Agency Strategist/Planner

challenges stopping audio and podcast advertising growth

Challenge	%
Evidence of effectiveness	40%
Measurement and tracking	33%
Cost	24%
Understanding around audio advertising	19%
Integration into wider cross-media campaigns	18%
Creating compelling advertising	15%
Executing partnerships with talent and creators	14%
Standardised metrics	13%
Resources to plan/execute	13%

Q- What are the three biggest issues stopping audio and podcast advertising from being a larger proportion of ad volume? Please select top 3. All respondents n=128
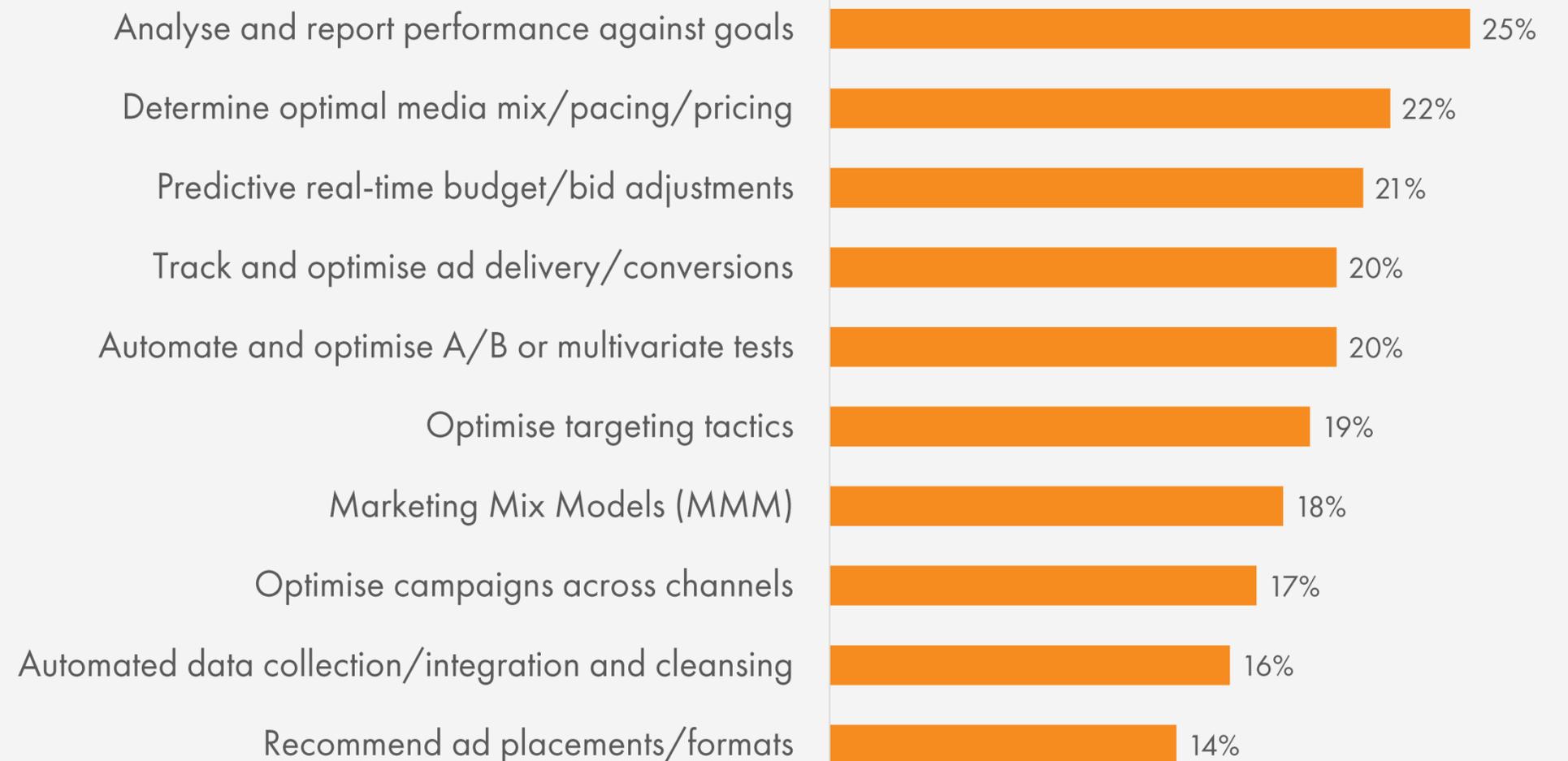
performance reporting seen as one of the key opportunities for incorporating AI

A new evolution of AI is upon us that will upend the industry's traditional workflows, job roles, and execution. Australian ad buyers see a number of opportunities for incorporating AI into audio advertising planning, activation and analysis.

"The most impactful action is to perfect and universalise dynamic audio creative personalisation. By creating standardised AI tools, platforms can rapidly generate thousands of hyper-relevant ad variations (location, context, mood, anything addressable!) from one script. This makes campaigns scalable and highly effective."
- Agency Strategist/Planner

greatest opportunities for incorporating AI into audio advertising planning, activation an analysis

Analyse and report performance against goals	25%
Determine optimal media mix/pacing/pricing	22%
Predictive real-time budget/bid adjustments	21%
Track and optimise ad delivery/conversions	20%
Automate and optimise A/B or multivariate tests	20%
Optimise targeting tactics	19%
Marketing Mix Models (MMM)	18%
Optimise campaigns across channels	17%
Automated data collection/integration and cleansing	16%
Recommend ad placements/formats	14%

Q- Which of the following do you think are the greatest opportunities for incorporating AI into audio advertising planning, activation and analysis? (Please select your top 3) All respondents n=128

opportunities in consumer voice-enabled or conversational AI experiences

IAB Australia Audio SOTN survey open-ended responses highlight opportunities for marketers in consumer voice-enabled or conversational AI experiences, including ....

- the opportunity for brands to show up in more natural, intuitive consumer moments
- tap into AI data to find out what consumers want
- helps marketers understand intent and context
- more tailored experiences for consumers
- ability to personalise based on consumer response
- personalised brand service, instant help desks
- reduce friction in search and shopping
- create utility-led experiences
- ability to create multiple executions at speed
- cost efficiencies

And some concerns ...

- we should not replace certain human aspects of communication
- improvements in technology are needed before I would become comfortable using it without significant human oversight
- clients will be cautious about this at the moment
- voice enabled advertising/search never took off in the AU market

Voice Shopping is getting loud worldwide*

Even before the advent of conversational AI, voice-assisted shopping already accounted for $4.6 Billion in 2021 worldwide sales revenue, and this year that number is expect to climb to $81.8 Billion, representing a 1,700% increase and 105.4% Compound Annual Growth Rate.

The parent category of conversational shopping (combining AI and live chat alongside simple voice queries) has followed a similarly trajectory, predicted to rise 1,053% from $41 Billion in '21 to a projected $473 Billion in 2026, nearly 30% of which is already coming from voice-only interactions.
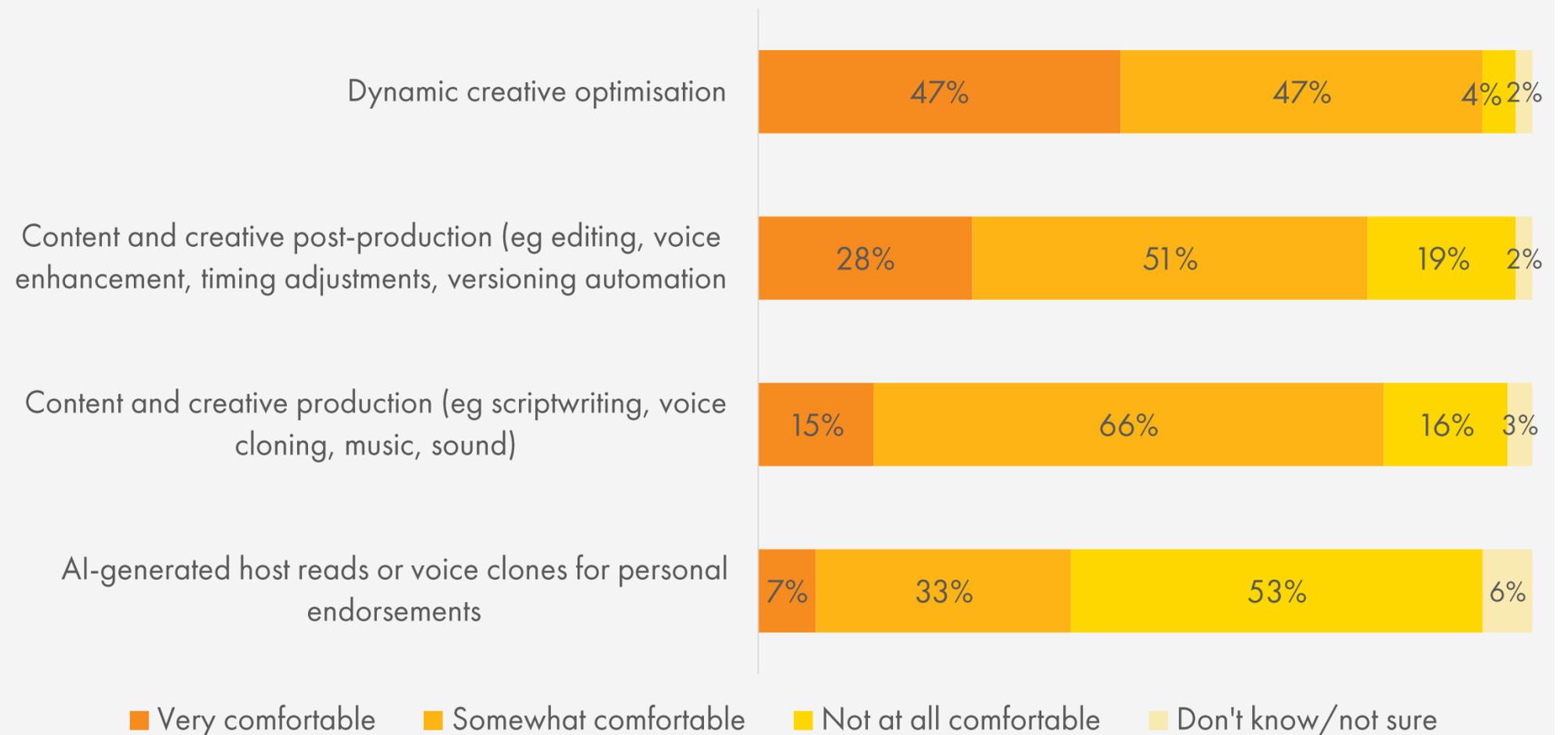

Voice Shopping Revenue Worldwide (in billions)
$4.60 (2021), $9.45 (2022), $19.4 (2023), $39.8 (2024*), $81.8 (2025*)
Source: Statista — *Estimate projection

Conversational Shopping Revenue Worldwide (in billions)
$41 (2021), $67 (2022), $109 (2023), $178 (2024*), $290 (2025*), $473 (2026*)
Source: Statista — *Estimate projection

*Source; IAB Advertising's Interactive Audio Future, Statistica, Capital One Shopping Research 2025

ad buyers are more comfortable with AI being used for advertising (DCO) but less in content production

Australian ad buyers have a level of discomfort with AI being used as part of the audio content production process.

6 in 10 respondents (59%) are not at all comfortable or are unsure about AI-generated host reads or voice clones for personal endorsements.

There is greater comfort in using AI in advertising, 94% of respondents are at least somewhat comfortable in AI being used in dynamic creative optimisation.

comfort level using AI as part of the audio advertising and content product process

Category	Very comfortable	Somewhat comfortable	Not at all comfortable	Don't know/not sure
Dynamic creative optimisation	47%	47%	4%	2%
Content and creative post-production (eg editing, voice enhancement, timing adjustments, versioning automation	28%	51%	19%	2%
Content and creative production (eg scriptwriting, voice cloning, music, sound)	15%	66%	16%	3%
AI-generated host reads or voice clones for personal endorsements	7%	33%	53%	6%

■ Very comfortable   ■ Somewhat comfortable   ■ Not at all comfortable   ■ Don't know/not sure

Q- How comfortable are you with AI being used as part of the audio advertising and content production process in the following areas? (Please select one response in each row) All respondents n=128
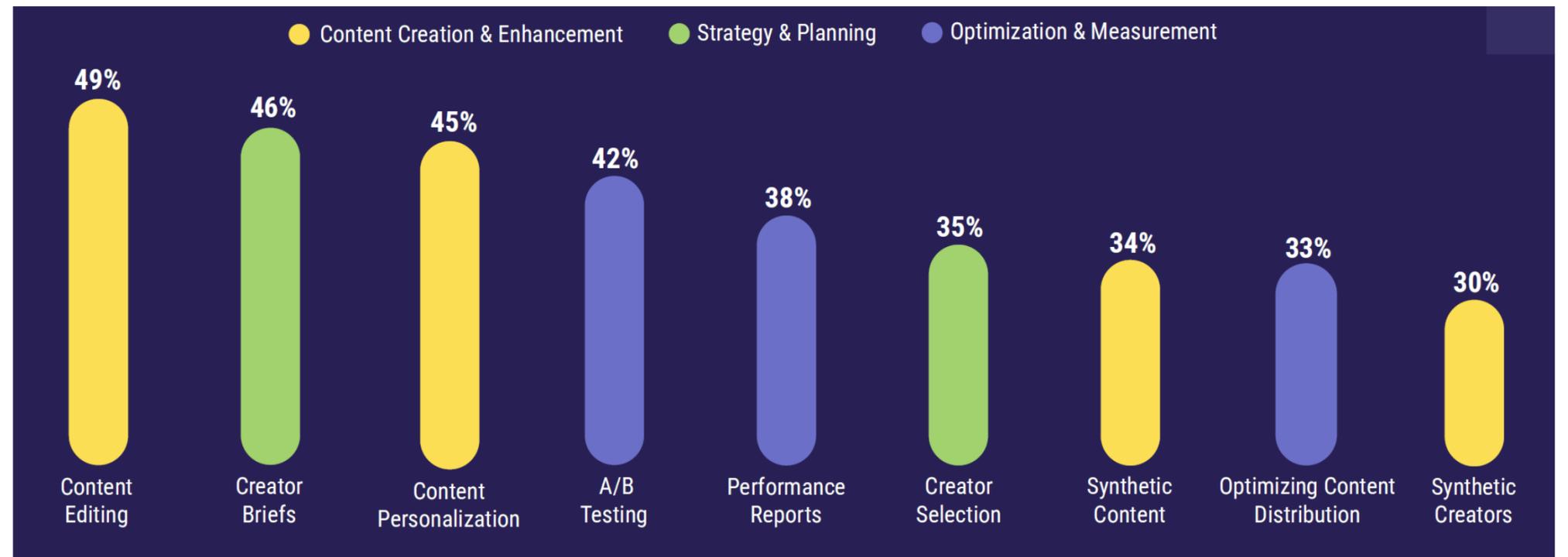
three in four US ad buyers are using or planning to use AI for creator marketing tasks

46% of US brands are currently using AI in the creator content creation and work processes, 29% plan to use it in the next 12 months*

Despite AI's growing role for creator advertisers, nearly all still have concerns about the effects of its use.

95% of brands have concerns about using AI in creator marketing overall, predominant concern is lack of authenticity or human connection.

% of US ad buyers using AI in creator campaigns by task*

Legend:
- Content Creation & Enhancement
- Strategy & Planning
- Optimization & Measurement

Task	%
Content Editing	49%
Creator Briefs	46%
Content Personalization	45%
A/B Testing	42%
Performance Reports	38%
Creator Selection	35%
Synthetic Content	34%
Optimizing Content Distribution	33%
Synthetic Creators	30%

*Source; IAB US 2025 Creator Economy Ad Spend & Strategy Report

opportunities to help marketers drive growth using digital audio advertising

Proof of effectiveness – including improved attribution, linking audio exposure to business outcomes, more seamless integration into MMM.

"If we could unify attribution, allow cross platform frequency control and deliver genuine incremental reach visibility, more dollars would move into audio simply because it becomes easier to justify investment to stakeholders. The formats and creativity already exist, the industry just needs clearer proof of performance."

"Integrate with MMM and econometrics. Building podcast specific MMM modules across all audio platforms would help media agencies and marketers verify the amount of sales attributed to digital audio and hopefully to be able to allocate additional budget to digital audio moving forward."

Scalable DCO

"Perfect and universalise dynamic audio creative personalisation. By creating standardised AI tools, platforms can rapidly generate thousands of hyper-relevant ad variations (location, context, mood, anything addressable!) from one script. This makes campaigns scalable, highly effective, and maximises audio's unique intimacy to drive measurable business growth."

"Advance dynamic creative optimization (DCO) and AI targeting technology to enable truly personalised and relevant ads"

Simplified buying and transparent programmatic supply chains

"Breakdown the programmatic money trail and reduce ad fraud. Improve transparency on margins form DSPs."

"Lower points of friction for programmatic trading and opportunities via standardised audience data for DSP-sided targeting"

Standardised audience data across audio and comparable to other media.

"Create a single, unified measurement framework that captures listening across podcasts, streaming, and radio. When marketers can see true reach, frequency, and outcomes in one view, they can plan confidently and prove impact. A shared audio currency would finally turn digital audio from a storytelling medium into a growth engine."

AI led automation and optimisation

"Looking at the ethical and practicality of AI implementation and creative thinking within campaigns. Having the ability to control how a voice sounds and the wording alongside it would help brand to work within tight turnarounds. At the same time, you have to look at the consistent struggle that people have with using AI audio/voiceover. If you can change the POV or perspective around that, I think you would have a lot more people interacting with digital audio advertising. "

Podcast innovation

"More integration placements within podcast shows, that aren't host reads... boring. Thinking, special segments linking back to brand business outcomes, TV and radio do this well, its podcasts time to shine. "

"For leading podcast distributors to use AI to create talent voice reads that brands can run as part of their programmatic podcast inventory, so brands can have the host reads for multiple podcasts in an affordable and high scale programmatic buy"

summary

Increasing trends

- Audio ad investment – in particular ads in original podcast and streaming music
- Investment in sponsorship, brand integrations, custom executions and extensions
- Investment in performance over brand
- Investment in programmatic guaranteed
- Gaining access to talent and content creators
- Usage of contextual signals and third-party data overlays for ad targeting

Emerging trends

- Advertising in video podcasts
- Self-service buying
- Retail/in-store audio advertising
- Usage of first-party/client data for ad targeting
- Investment in branded podcasts
- Using podcast creators as part of a creator marketing strategy
- AI for optimisation of media mix, pacing, pricing, ad delivery, targeting and effectiveness
- Conversational commerce

Challenges

- Proving ROI
- Combining data into a single view of campaign performance across audio platforms
- Comparing audience across content and platform opportunities for media planning
- Opaque supply chain
- Ethical use of AI in the content production to scale creator opportunities

further resources
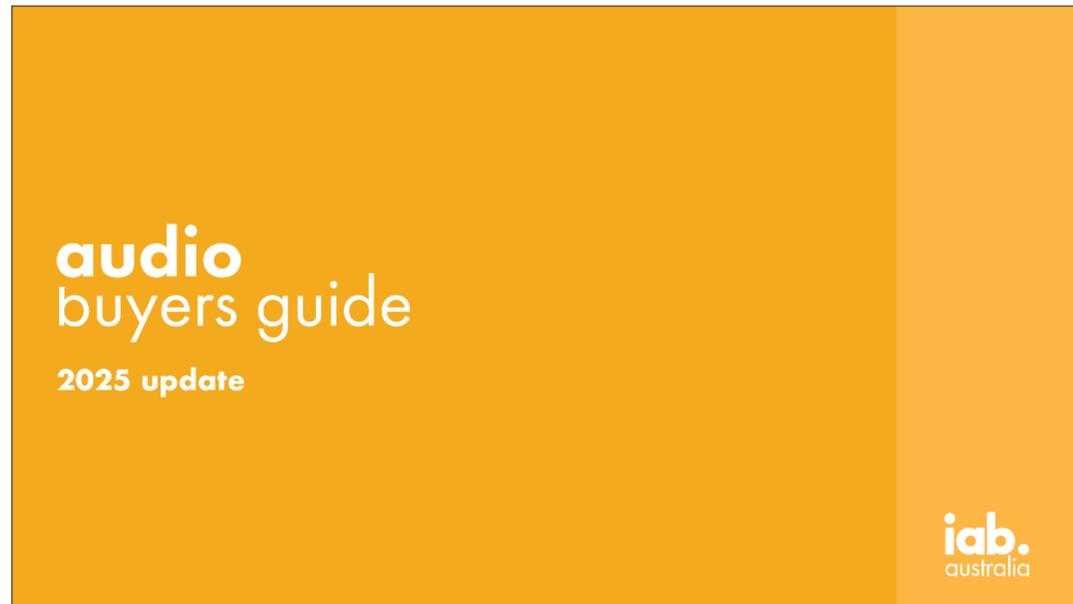
IAB Australia
Audio Buyers Guide 2025 Update

IAB Australia
Internet Advertising Revenue Reports

IAB
Measuring Digital Audio in MMM

IAB Australia
AI Unlocked: A Resources & Learning Guide for the Ad Industry