

A person is holding a smartphone in their right hand, looking at the screen. The background is a blurred city street at night, with warm bokeh lights from buildings and streetlights. A semi-transparent grey diagonal bar is overlaid on the left side of the image, containing the title and other text.

# THE IMPACT OF AUDIO 2.0

WPP MEDIA NL  
CONTEXT LAB  
MARCH 2026

**KANTAR**

# THE POWER OF AUDIO 2.0

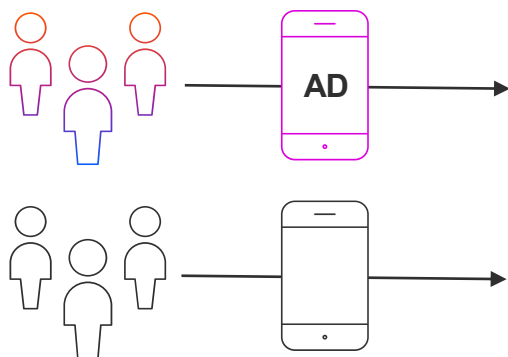
This Context Lab study focusses on **which audio formats are performing best in which context**, enabling early optimization. The method involves a controlled control-exposed design that predicts the impact of audio platforms and creatives on key brand KPIs.

| OVERVIEW    |                 | RESEARCH GOALS                                                            |                                                                                                                                    | AUDIENCE                                |                 | DELIVERABLE                                                                                                                                                                              |
|-------------|-----------------|---------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Region      | EMEA            | Insight on the <b>brand impact</b> of <b>audio</b> advertising, split by: |                                                                                                                                    | Audio platform users in the Netherlands |                 | The total brand impact of all test conditions will be aggregated into <b>impact factors</b> which can be used to calculate the quality-GRP (QRP) per platform, format and advertisement. |
| Market      | The Netherlands |                                                                           |                                                                                                                                    | M/F 18-65 (N=5.400)                     |                 |                                                                                                                                                                                          |
| Media type  | Audio           | Platform                                                                  | Linear radio, Online radio, Podcast, Music streaming                                                                               | Exposed A                               | TK Maxx N=3.000 |                                                                                                                                                                                          |
| Advertisers | TK Maxx, Achmea |                                                                           |                                                                                                                                    | Exposed B                               | Achmea N=2.400  |                                                                                                                                                                                          |
| Delivery    | March 2026      | Distraction type                                                          | Motoric, Cognitive, None                                                                                                           |                                         |                 |                                                                                                                                                                                          |
|             |                 | Format                                                                    | 20" in-break/pre-roll<br>30" in-break/pre-roll<br>20" addressable persona<br>20" addressable product<br>Podcast pre-roll/host-read |                                         |                 |                                                                                                                                                                                          |

# RESEARCH DESIGN

This Context Lab study focusses on **which audio formats are performing best in which context**, enabling early optimization. The method involves a controlled control-exposed design that predicts the impact of audio platforms and creatives on key brand KPIs.

## CAPTURING AD EXPOSURE



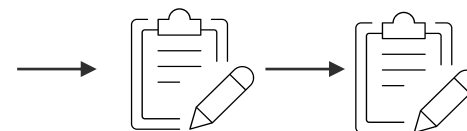
## BRAND IMPACT

|         | Have seen                        | Have not seen         |
|---------|----------------------------------|-----------------------|
| Brand A | <input checked="" type="radio"/> | <input type="radio"/> |
| Brand B | <input type="radio"/>            | <input type="radio"/> |
| Brand C | <input type="radio"/>            | <input type="radio"/> |

1. Respondent is assigned to a test condition based on gender, age and media usage.
2. Respondents are invited to visit a site where they could listen to audio content while we distracted them with a task.

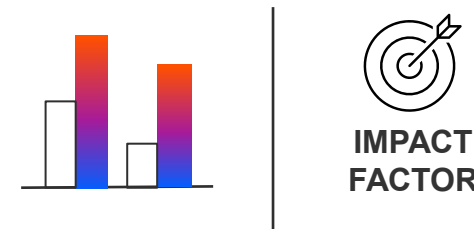
Respondents are surveyed simultaneously with the same survey to uncover Brand Impact.

## CREATIVE / PLATFORM DATA



Based on the creative and platform they have just seen, respondents are surveyed to uncover Creative & Platform Insights.

## ANALYSIS

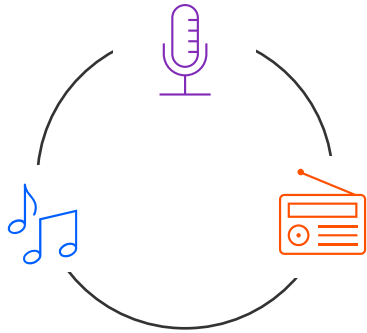


1. Exposed group is compared to control baseline to determine media effect
2. Total effect is combined into one score per format, device and platform type

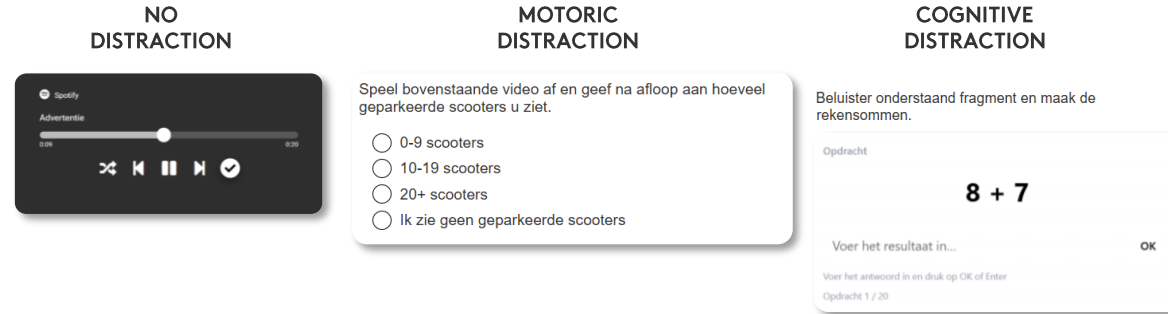
# THE SIMULATION

This Context Lab study focusses on **which audio formats are performing best in which context**, enabling early optimization. The method involves a controlled control-exposed design that predicts the impact of audio platforms and creatives on key brand KPIs.

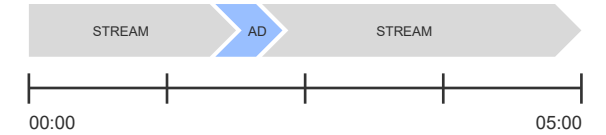
## CHOOSE CONTENT



## SIMULATION



## EXPOSURE



Respondent receives a list of radio channels / podcasts / songs and chooses one.

Depending on the assigned condition, the respondent could be asked to perform motoric / cognitive tasks while listening to an audio fragment.

The advertisement is played in the chosen audio fragment.

# QUANTIFYING AWARENESS IMPACT ►►

WPP Media and Kantar have been working together since 2019 to uncover the brand impact of different media platforms, formats and devices. The impact factor is used to determine the QRP which can be used to optimize media based on awareness.

**QRP**

= GRP x Impact factor

**200+**

impact factors  
uncovered so far

**15+**

media types

TV, OLV, Streaming, Social, Radio, Podcast, Print, Retail, Gaming, Cinema, Display & more

**50+**

publishers

we've collaborated with

# Media ranked on awareness impact

Based on 1 ad impression



Higher impact factor =  
suitable for complex messages

# KEY FINDINGS AUDIO 2.0

## AWARENESS IMPACT

Significant increases were observed across key awareness metrics, with the most notable improvement in

- Top-of-Mind Brand Awareness **Δ+8**
- Spontaneous Brand Awareness **Δ+11**
- Ad Awareness **Δ+10**

Impact was the lowest on Brand Favorability, indicating that one contact with the campaign did not strengthen the audience's feeling towards the brand.

## FORMAT PERFORMANCE

Awareness impact strongly varies per platform and format:

- Podcast have the highest impact (**112 impact factor**). Impact is driven by ad duration and platform attention.
- Impact has been less pronounced via music streaming (**73 impact factor**), in line with attention as this platform is more often listened to while distracted.
- Impact increases with spot length: **+41 index points** of 30" in-break vs. 20" in-break.

## IMPACT OF DISTRACTION

Generally, ad impact is highest when the audience is not distracted by a task, although there are differences per platform:

- The **impact of podcast ads is consistently high**, even when the audience is performing a task, indicating that attention on this platform is high.
- The **impact of linear radio and music streaming significantly decreases when the audience is multi-tasking**: the audio stream tends to fade to the background more quickly.

## ADDRESSABLE

Generally, personalizing ad formats with an addressable message increases impact on awareness:

- Personalizing based on audience characteristics (persona's) has the strongest overall impact (**+68% vs. regular 20"**)
- Personalizing based on product characteristics adds **+22% vs. regular 20"**.

# Impact factor

/ˈɪmpəkt ˈfaktə/

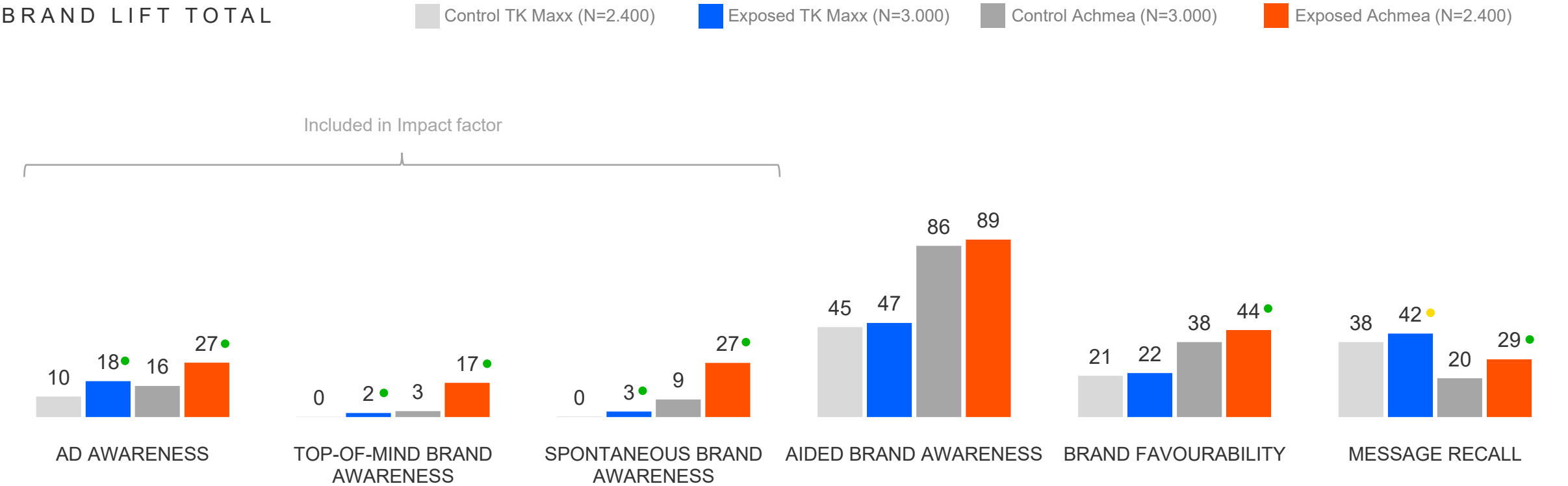
1. the combined average uplift on brand awareness and online ad awareness, split by format, device and platform type

Source: WPP Media x Kantar



# Significant uplifts were realized on Awareness for both brands

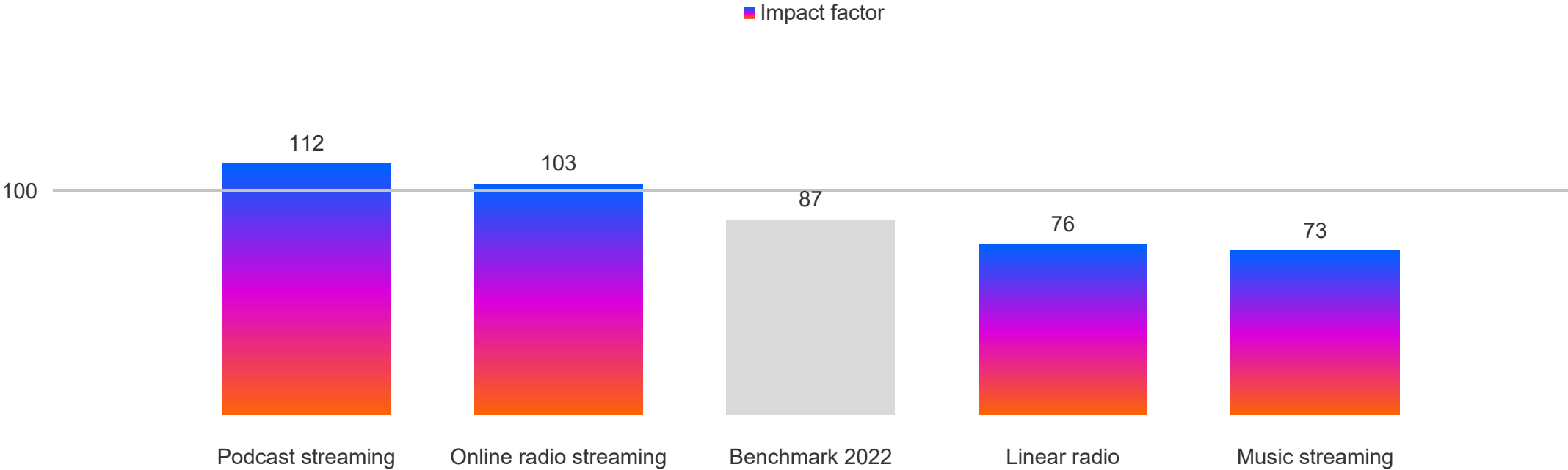
Significant increases were observed across key awareness metrics, with the most **notable improvement in Ad Awareness** for Achmea and TK Maxx. To ensure comparability across the two brands and with previous impact studies conducted in the Netherlands, only awareness KPIs were considered in the calculation of the Impact Factor.



# Strongest impact observed with advertising via podcasts

On average, the impact of the 20” pre-roll and in-break advertisements is comparable across different platforms. As a platform, podcast advertising is the most impactful – mostly driven by the host-read format.

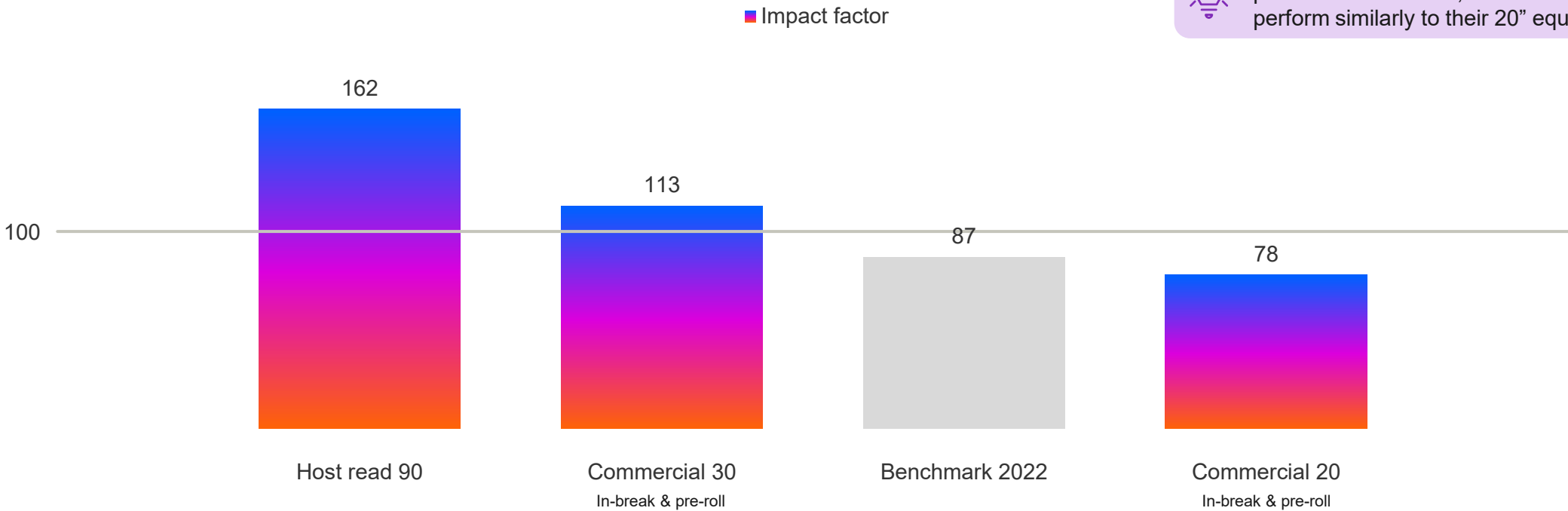
IMPACT FACTOR PER PLATFORM\*



# Host read is by far the most impactful audio format

As a standalone format, the impact of one contact with a 20” pre-roll or in-break ad is on the lower side, indicating that higher contact frequencies might be needed to realize impact on awareness. Increasing spot length with 10 seconds can already increase impact with +44%. The highest impact is achieved via host read, which is by far the longest ad format.

IMPACT FACTOR PER FORMAT

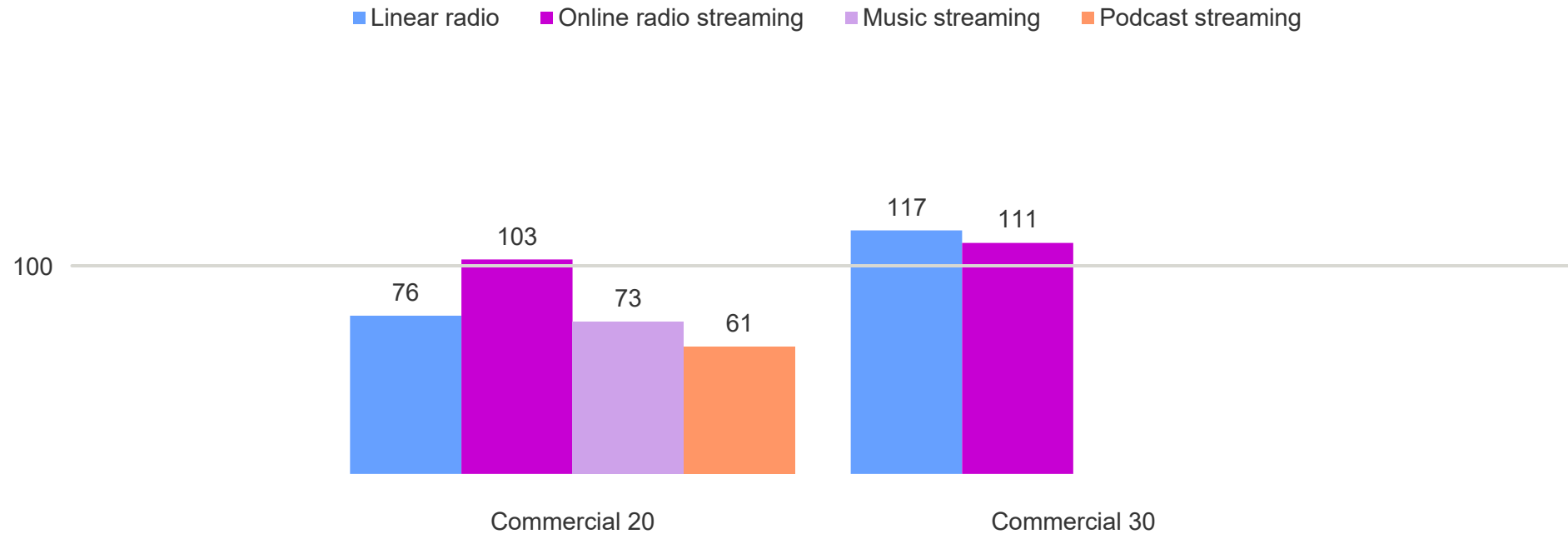


The impact of longer spot duration is more pronounced for radio; in TV in-break, 30” spots perform similarly to their 20” equivalents.

# 30” commercials consistently outperform the shorter 20” equivalents

The differences are most pronounced for linear radio. As the overall environment is more cluttered for linear radio than for the other platforms where we tested Preroll ads, a longer spot helped the ad create a better breakthrough.

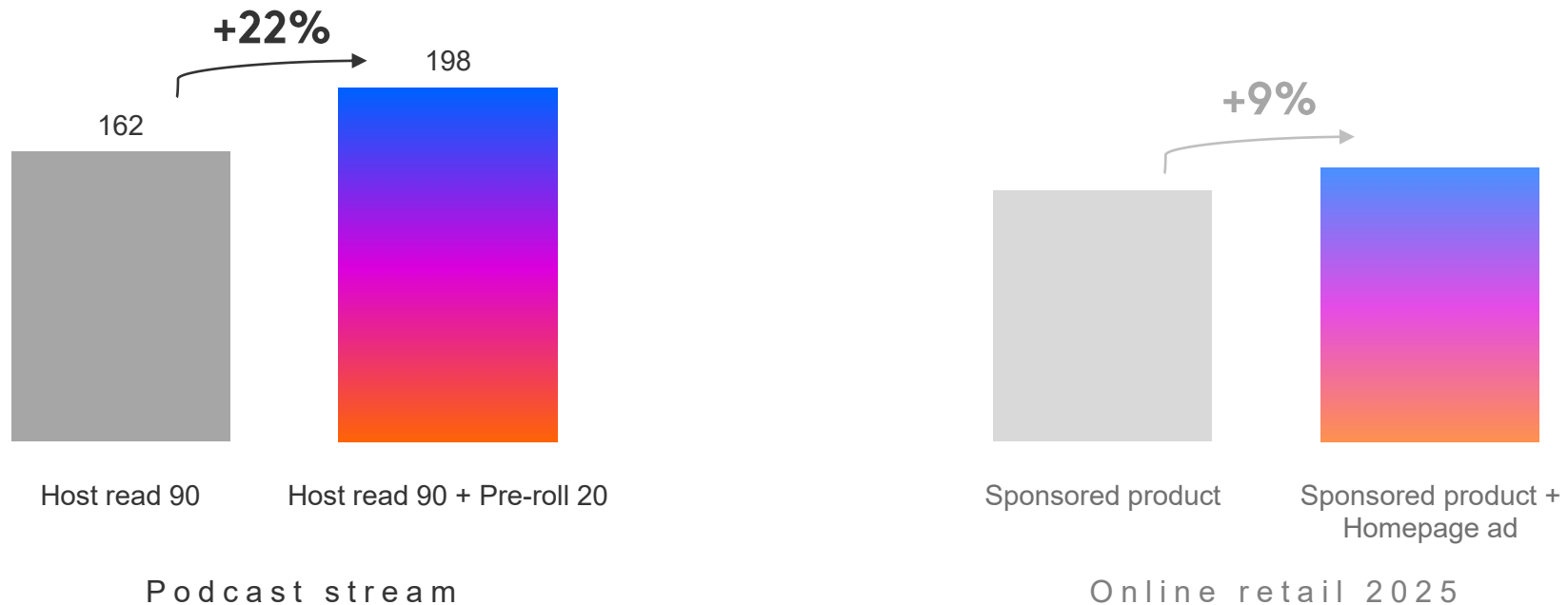
## IMPACT FACTOR PER FORMAT x PLATFORM



# Host read is by far the most impactful audio format, particularly when combined with a pre-roll

Combined with host read, the pre-roll add can increase the impact of a single host read up to +22%. Next to a longer exposure with the brand, priming the audience with a brand message in the beginning of the stream might help landing the host read during the podcast stream. Results align with the online retail study where synergy was also measured. Brand priming with a homepage ad increased impact of the sponsored product with +9%.

## IMPACT FACTOR PER FORMAT



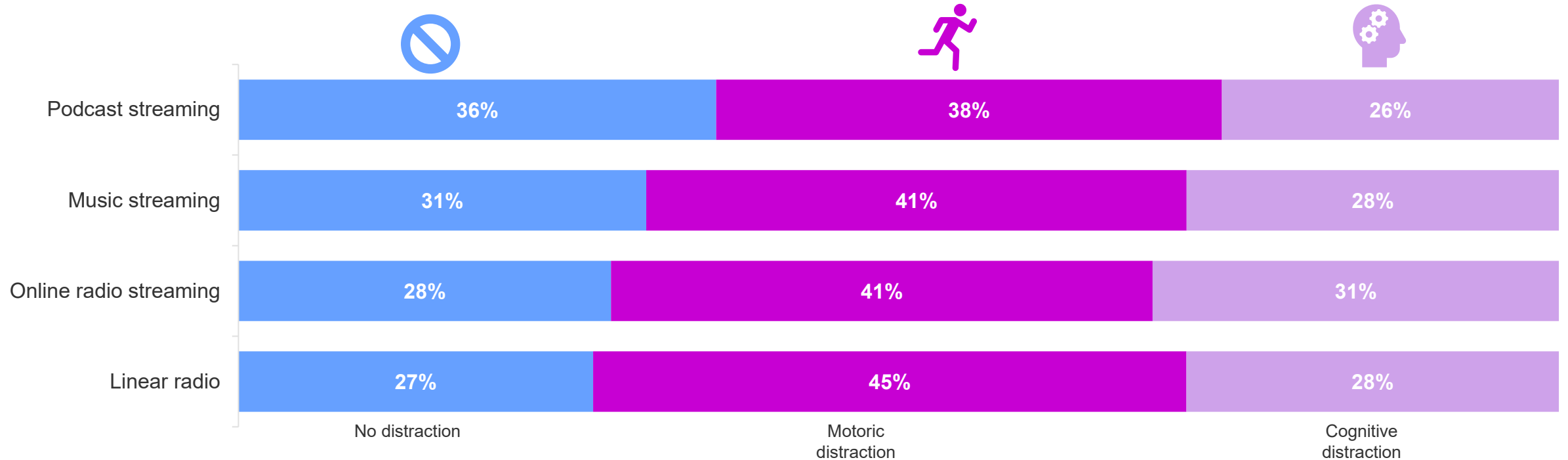
# Impact of distraction



# Generally, podcasts are listened to with the most attention

Radio is most often listened to during a physical activity such as driving a car, online radio streams are most often listened to during a mental activity such as working or studying.

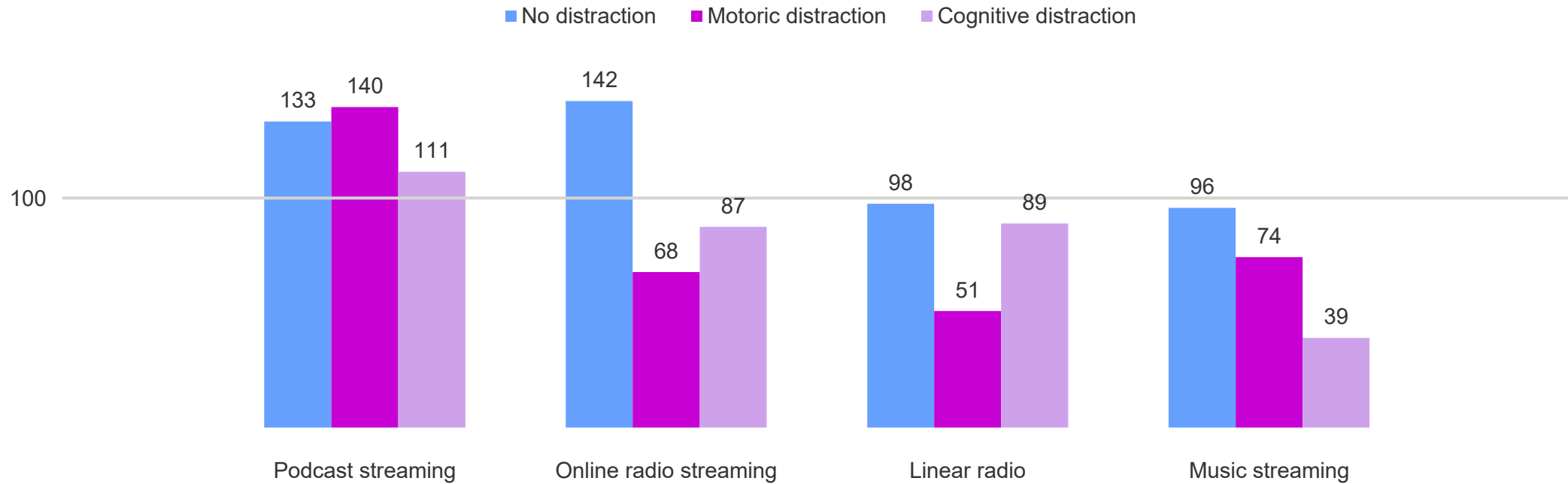
## PLATFORM BEHAVIOUR



# Impact of distraction is most strongly visible via online radio streams

On average, podcasts are consumed with more attention – even when the audience is distracted by a motoric or cognitive tasks – leading to a stronger overall impact. Online radio or music streams, on the other hand, seems to fade to the background more easily when the audience is focusing on a different task.

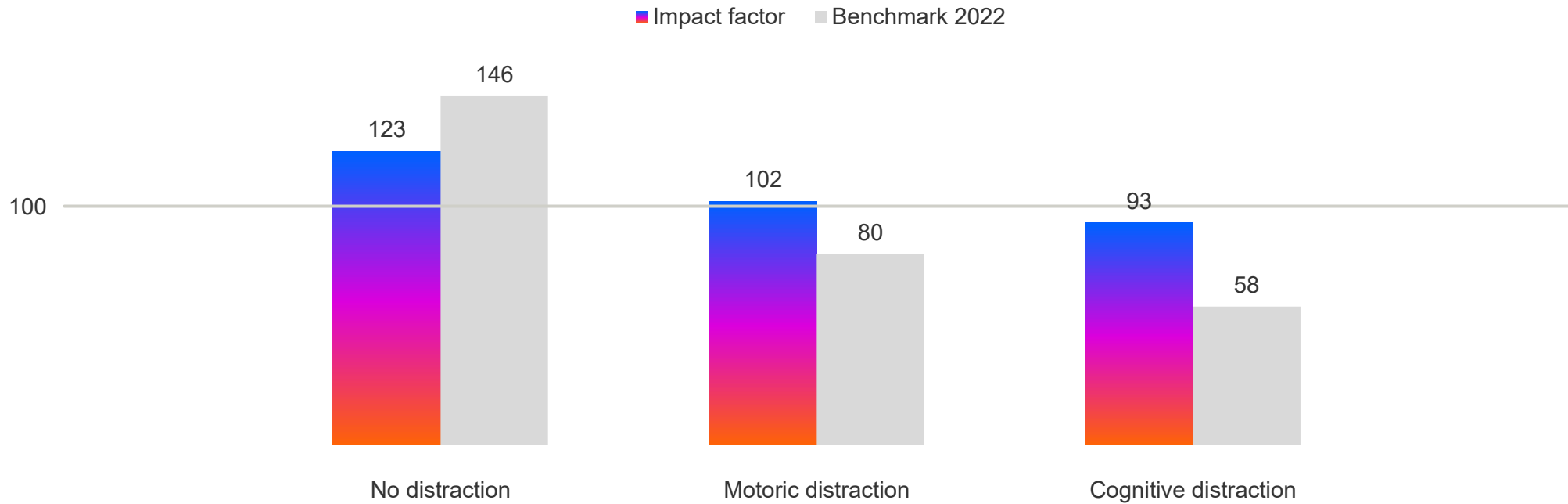
IMPACT FACTOR PER FORMAT x PLATFORM



# Distraction significantly affects the level of awareness

Just like we saw in 2022, ads are most impactful in the environments where no distraction was added. Nonetheless, the differences are less pronounced than they were in 2022, likely because different formats were tested.

## IMPACT FACTOR PER DISTRACTION



# Impact of addressable



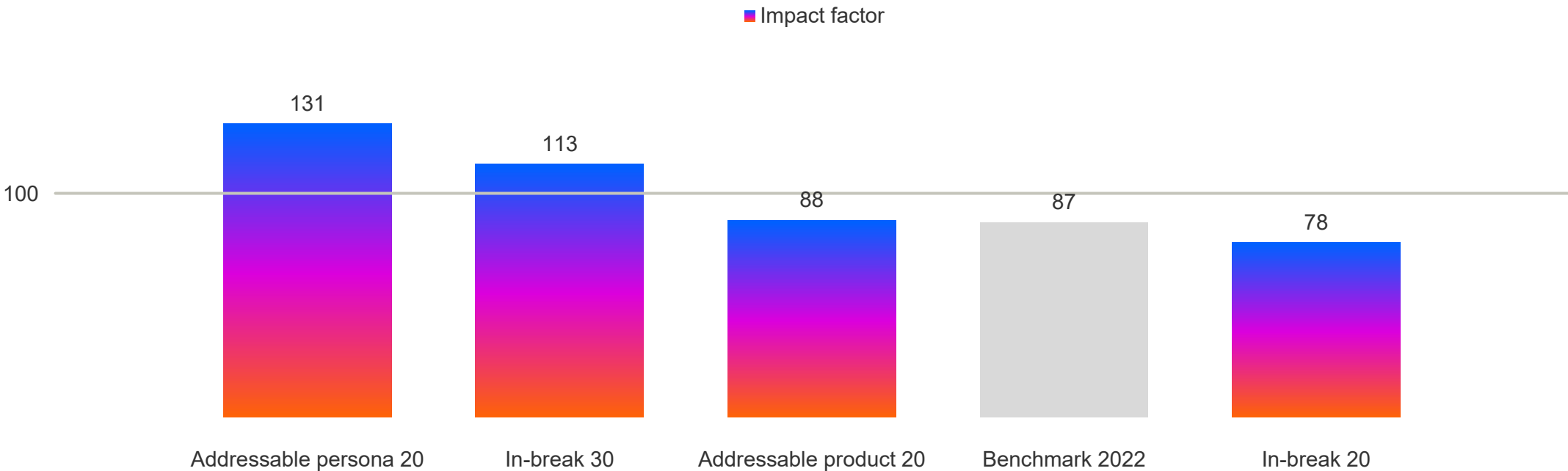
# We grouped the audience in personas and product interests and served them a relevant ad accordingly to test the impact of addressable:

| SPOT                                                                                                                              | INTRO                          | PRODUCT CUE                                                                                                      | BRAND PROMISE                                               | PAY-OFF                                                  |
|-----------------------------------------------------------------------------------------------------------------------------------|--------------------------------|------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|----------------------------------------------------------|
| REGULAR                                                                                                                           | Ben jij al een schatzoeker?    | Een date night outfit? TK Maxx. Designer accessoires? TK Maxx. Stijlvolle cadeaus? TK Maxx.                      | De mooiste merken voor kleine prijzen.                      | Ga snel naar één van onze 19 winkels en ontdek het zelf. |
| <br>PERSONA<br>LUXURIOUS<br>CONVENIENCE<br>IMPULS | Ben jij al een schatzoeker?    | Op zoek naar luxe designerbags? TK Maxx. Statement fashion van grote merken? TK Maxx.                            | Exclusieve looks voor verrassend kleine prijzen.            |                                                          |
|                                                                                                                                   | Ben jij al aan het schatzoeken | voor outfits die meteen kloppen? TK Maxx. Alles voor je huis in één snelle stop. TK Maxx.                        | Alles simpel, alles bij elkaar, makkelijk meegenomen.       |                                                          |
|                                                                                                                                   | Ben jij al een schatzoeker?    | Op zoek naar deals die te goed zijn om te laten liggen? TK Maxx. Die jas die je ineens wilt hebben? TK Maxx.     | Precies hoe je het graag hebt.                              | There's no deal like a TK Maxx deal.                     |
| CLOTHING                                                                                                                          | Ben jij al een schatzoeker?    | Van schoenen, casual tot chic? TK Maxx. De nieuwste kleding die je helpt aan een hippe look? TK Maxx.            | Grote merken, Kleine prijzen. Elke keer weer verrassend.    |                                                          |
| <br>PRODUCT<br>BEAUTY<br>SPORT                   | Ben jij al een schatzoeker?    | Luxe beauty en skincare van jouw favoriete merken? TK Maxx. Make-up die je laat stralen? TK Maxx.                | Premium beauty waar je blij van wordt.                      |                                                          |
|                                                                                                                                   | Ben jij al aan het schatzoeken | voor sportkleding die echt lekker zit? TK Maxx. Sport gear waarmee je meteen zin krijgt om te beginnen? TK Maxx. | Topmerken voor verrassend lage prijzen. Game on.            |                                                          |
| HOME & GARDEN                                                                                                                     | Ben jij al een schatzoeker?    | Meubels die je interieur laten shinen? TK Maxx. Home deco die precies jouw stijl raakt? TK Maxx.                 | Mooie, grote merken voor klein geld. Voor binnen en buiten. |                                                          |

# Increasing addressability by persona adds the highest impact

The addressable persona (focusing on personal character traits and interest) can potentially increase the impact of a regular in-break commercial by +68%. Adding cues based on product benefits adds up to +13%, but the campaign might benefit even more from an increase in spot length from 20 to 30 (+45%).

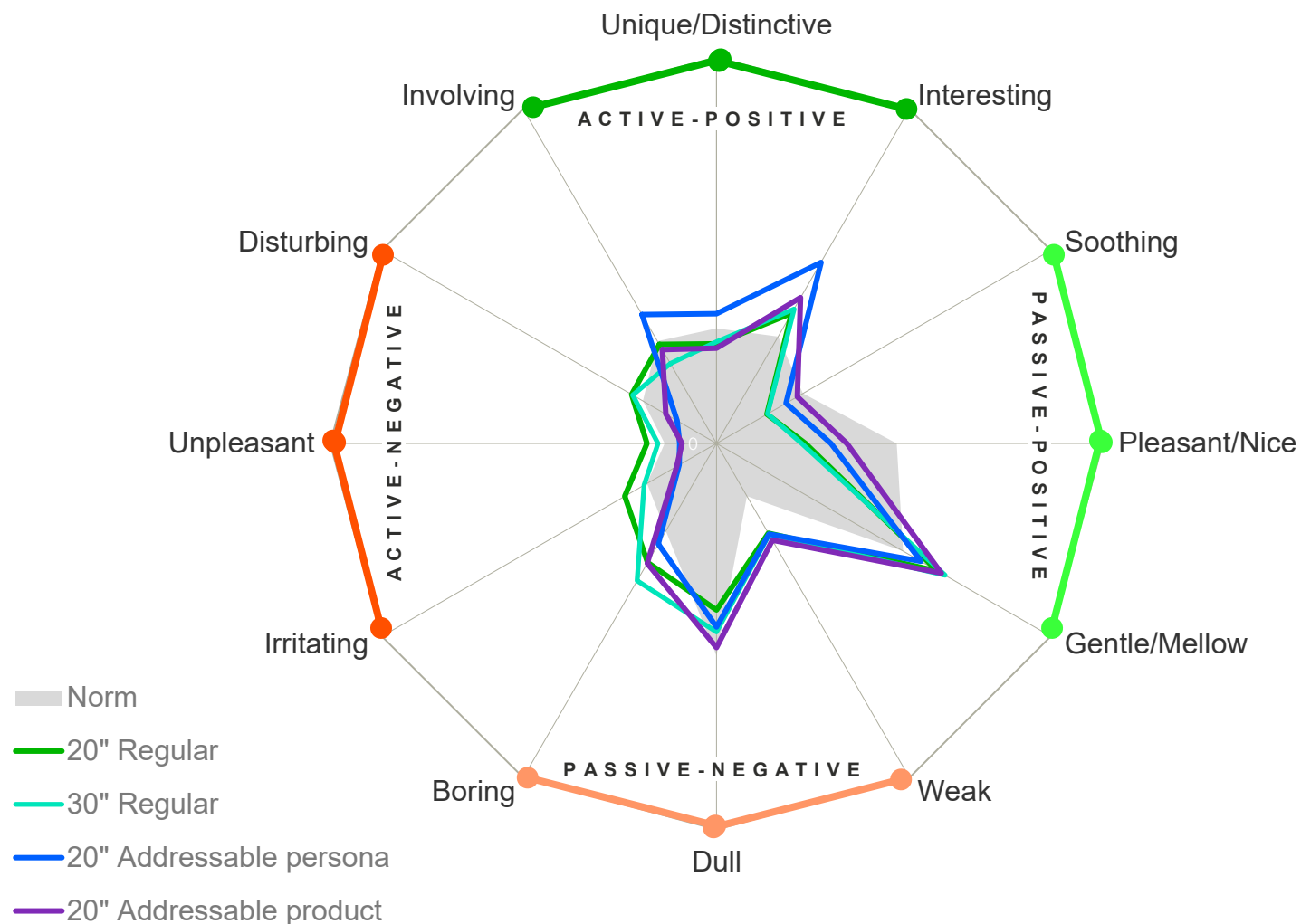
IMPACT FACTOR PER FORMAT



## Addressability in terms of persona has the most potential in engaging the audience

Across the tested ads, the addressable ads have the strongest creative involvement scores, with the highest scores on active positive metrics and scoring low on the active negative metrics.

Applying a personalized message increases involvement and distinctiveness, particularly when the message relates to personal characteristics (rather than product characteristics).



# Creative insights



# Strong branding across both campaigns provides a solid foundation for achieving awareness impact

The brand was consistently recognizable for both TK Maxx and Achmea across all ads, demonstrating that the creative effectively generated awareness and is therefore suitable to include in our study.

Between the two ads, TK Maxx is perceived as more differentiating than Achmea, which can be attributed to the category as generally the insurance category is perceived as less differentiating.

## CREATIVE METRICS TK MAXX



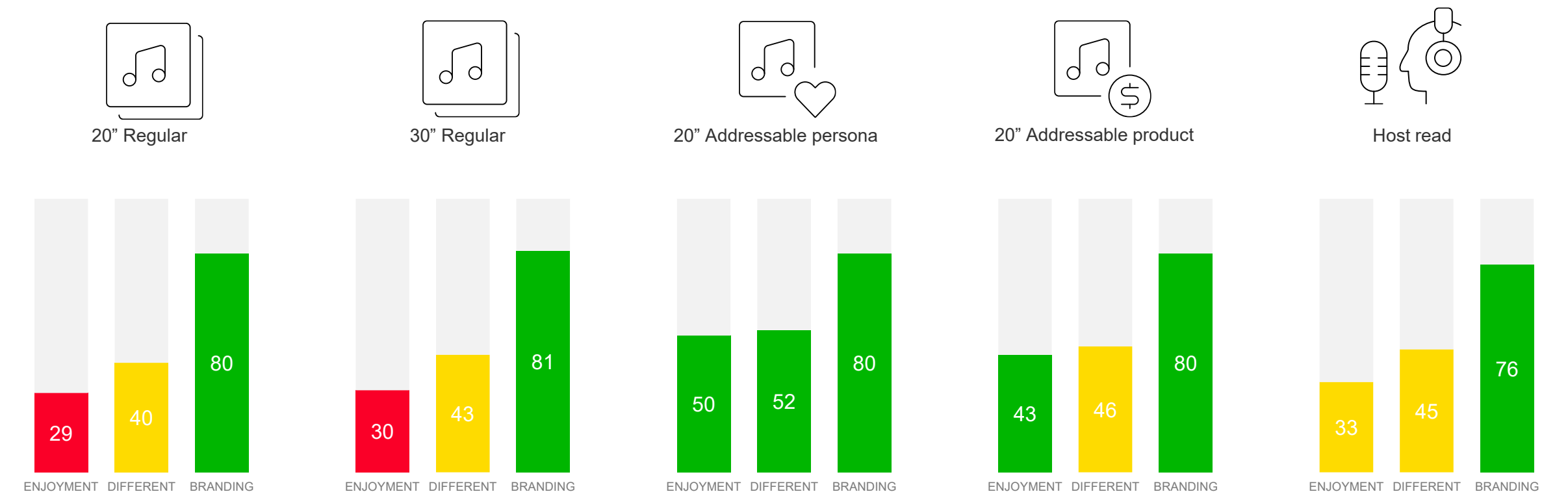
## CREATIVE METRICS ACHMEA



# The addressable ads are enjoyed most and perceived as differentiating

This aligns with positive scores in terms of impact. In addition, the addressable persona is perceived even more positively than focusing addressable creative on product attributes.

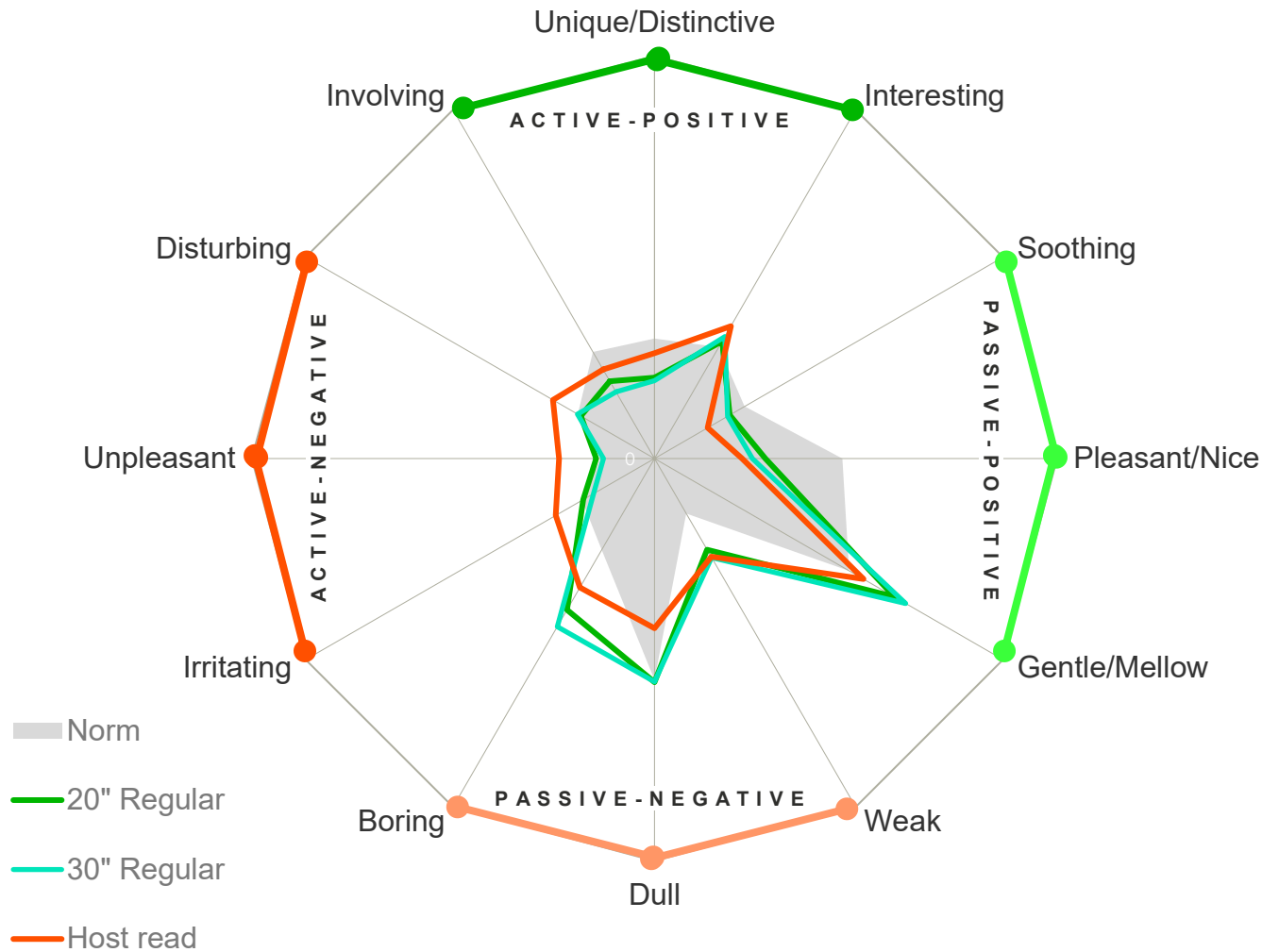
## CREATIVE METRICS



On average, **audio formats** are consumed **passively** and perceived as gentle or mellow

While impactful in terms of awareness, the host read is perceived the most negatively. Length of the advertisement can play a role.

In line with enjoyment scores, the addressable persona ads are perceived as the most interesting and involving, likely because they are addressing relevant audience characteristics.



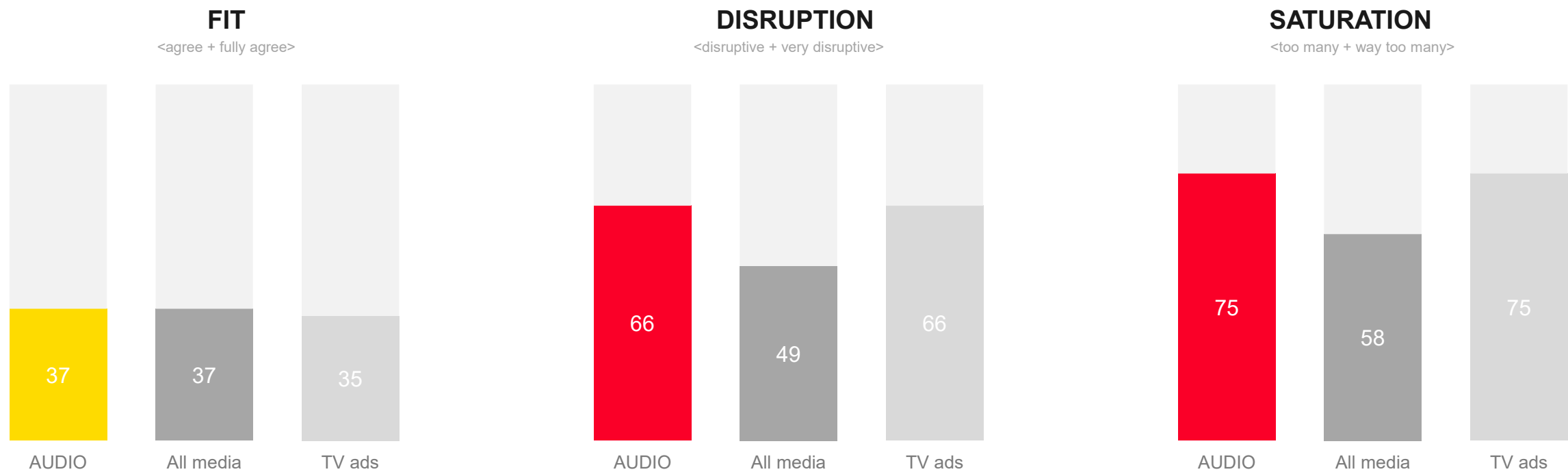
# Platform insights



# On average, audio ads are perceived as fitting but above norm on disruption

Audio ads are comparable to TV ads when it comes to the perception of the number of ads (saturation) and disruptiveness of the ads advertised. Nonetheless, disruptiveness and saturation are higher than the average ad tested via Context Lab – mainly because digital ads have a more positive experience due to skippability and shorter ad breaks.

## PLATFORM METRICS

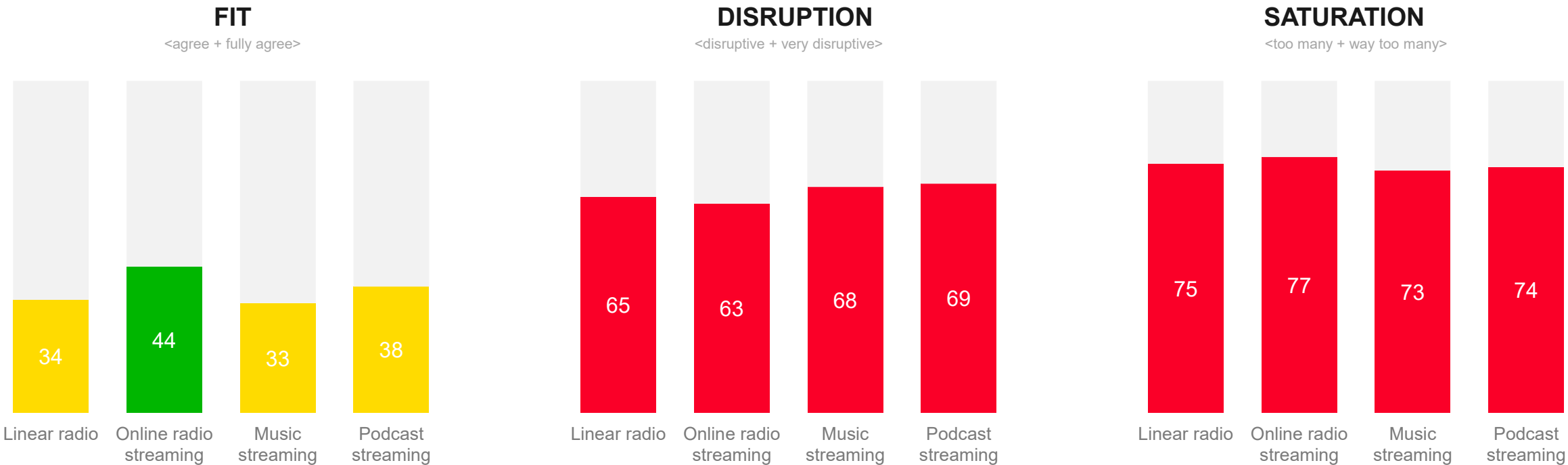


# Ad experience most positive via online radio streaming services

Within the different platforms, advertising via online radio streaming is perceived the most positively in terms of fit. In terms of saturation and disruption, scores are consistent across platforms.

## PLATFORM METRICS

 Differences between platforms are less pronounced than in 2022: increased ad load in the online channels can play a role.

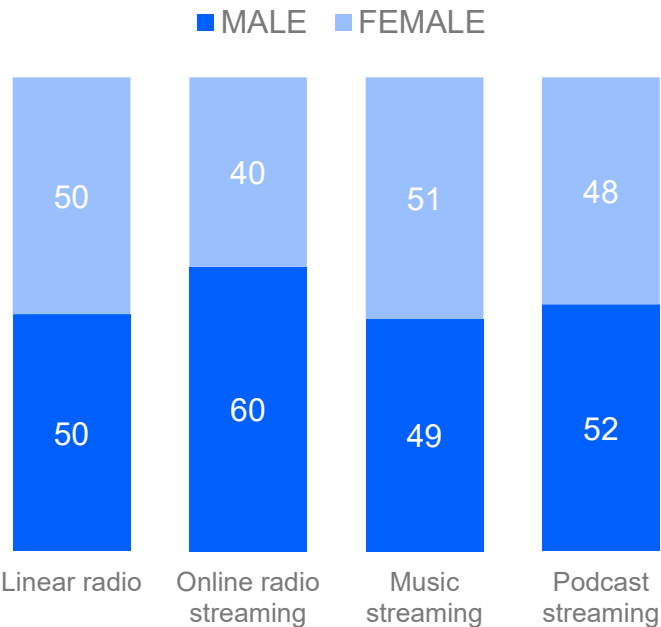


# Music and podcasts streams have a younger demographic than radio

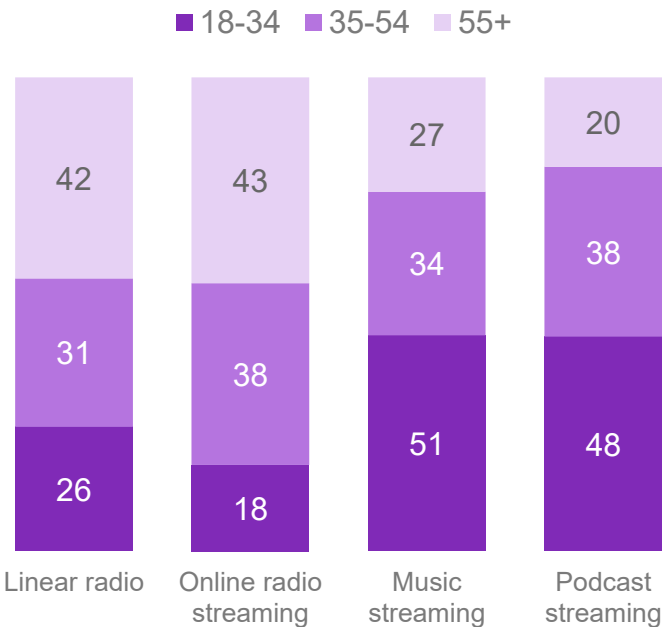
Interestingly, online radio streamed via an online service does not necessarily have a younger audience. To reach a younger demographic to amplify the linear radio strategy, moving to music or podcast streams is recommended over online radio streaming.

## PLATFORM METRICS

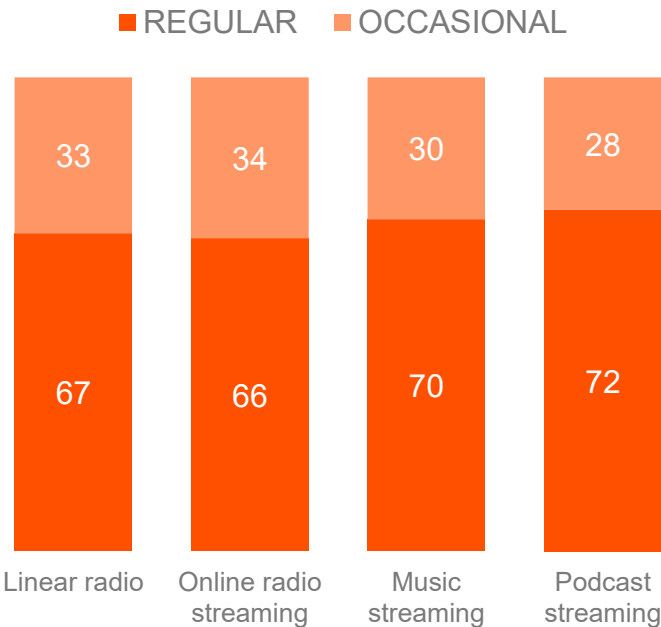
GENDER



AGE



USER FREQUENCY

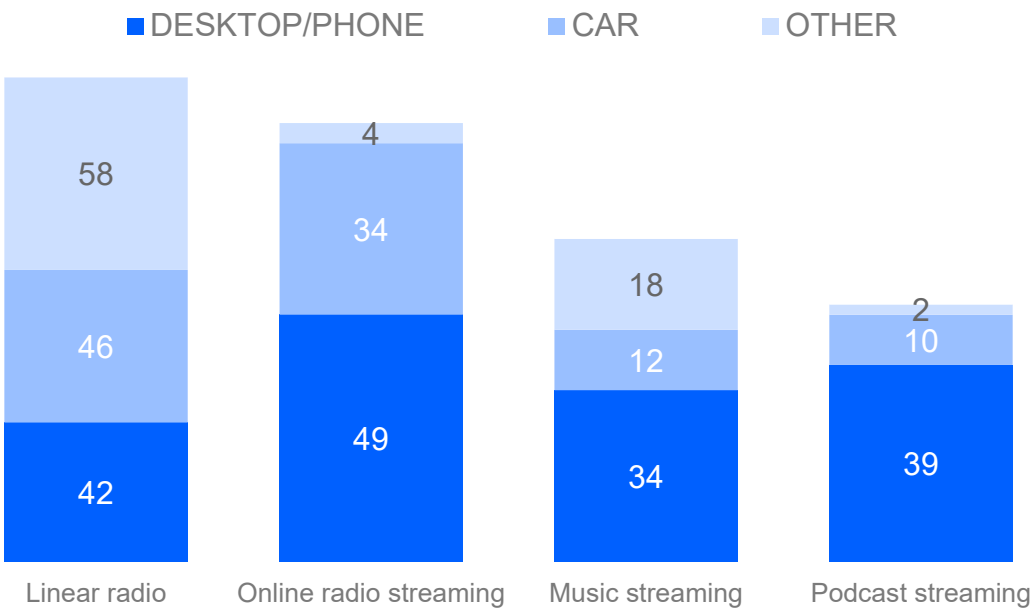


# Linear radio is most often listened to via live speakers in the car while podcasts are most often consumed with headphones

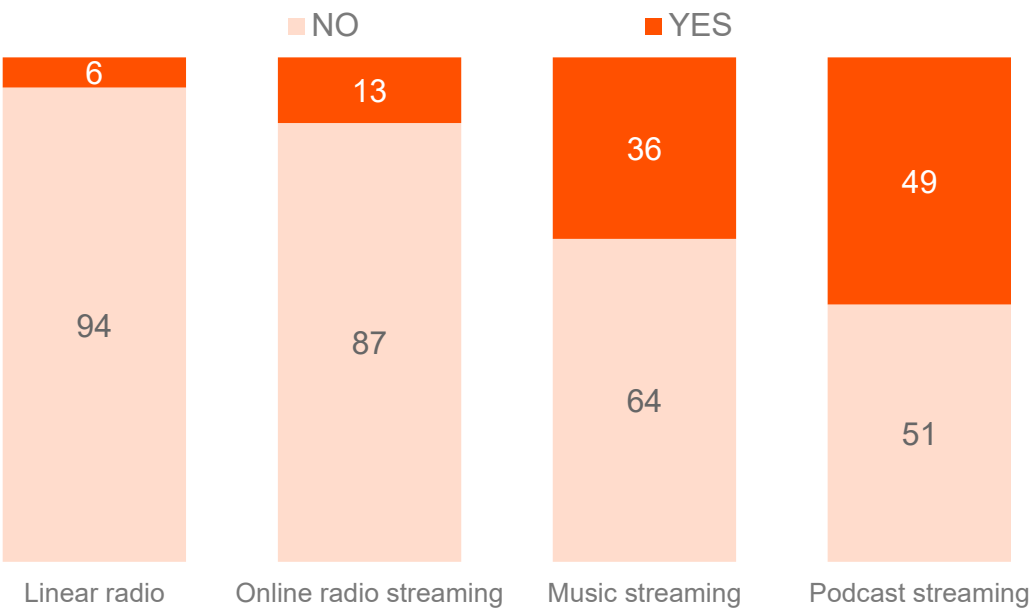
Radio via an online radio stream is most often listened to via the speakers of a desktop or mobile phone.

## PLATFORM METRICS

SPEAKERS



HEADPHONES



# Recommendations



# RECOMMENDATIONS

## AUDIO ADVERTISING DRIVES CLEAR UPPER-FUNNEL BRAND IMPACT (AWARENESS)

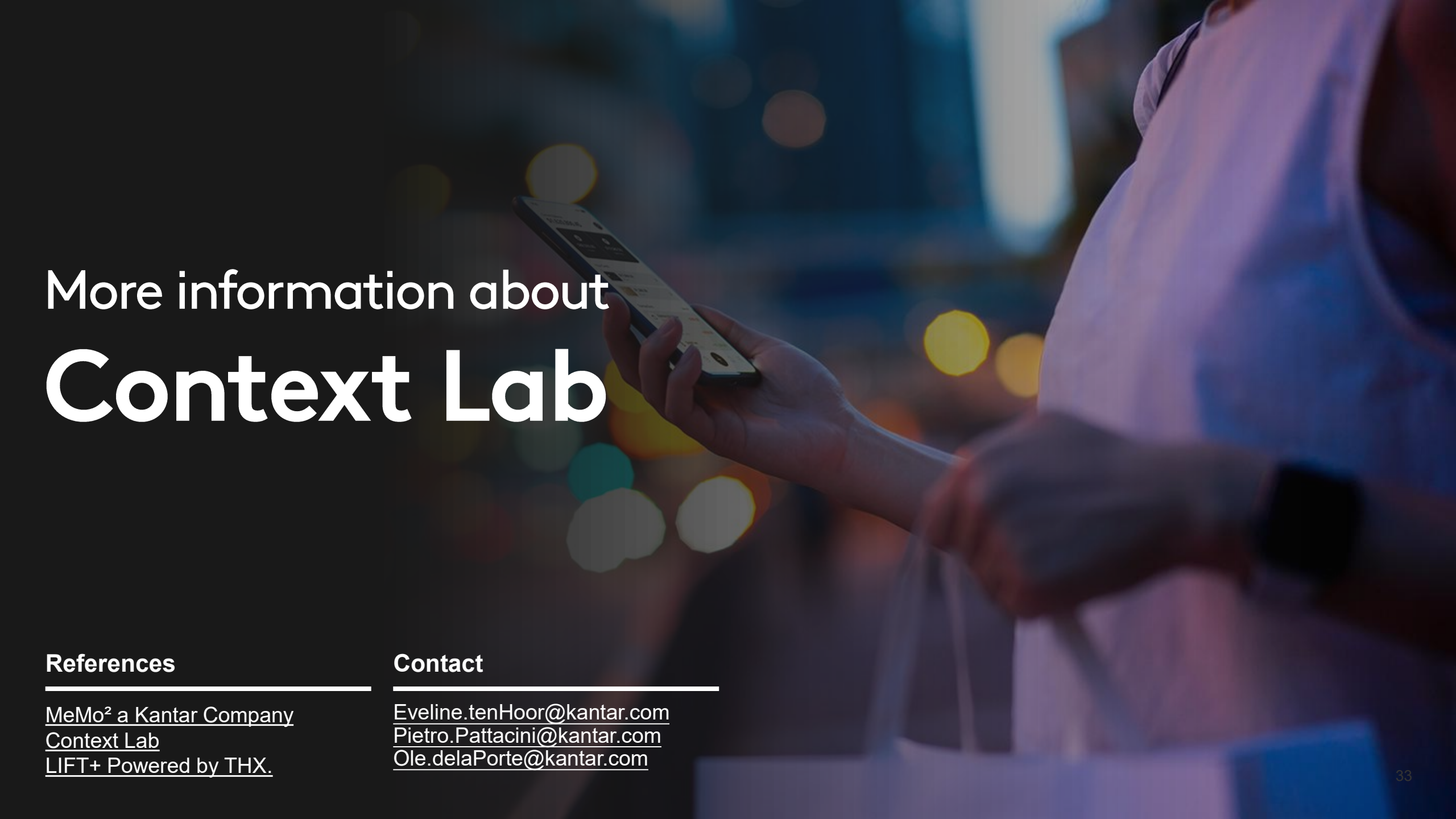
- **Consider boosting audio campaigns with higher contact frequencies:** Since audio delivers strong uplifts in Top-of-Mind, Spontaneous, and Ad Awareness, prioritize audio channels when campaigns have upper-funnel goals. Build frequency curves that ensure multiple exposures, as single exposures boost recognition but not favorability.
- **Pair audio with reinforcing channels:** Brand favorability barely moves after one audio touchpoint. Combine audio with formats suited for emotional storytelling (e.g., video or DOOH) to strengthen sentiment while audio ensures mental availability.

## LONGER FORMATS (PODCAST & 30" ADS) DELIVER THE HIGHEST IMPACT

- **Strong potential for podcasts & host-read formats, but focus on creating enjoyable content:** Podcasts consistently achieve the highest impact factors, even under distraction. Nonetheless, there is potential to benefit from host credibility when content is perceived as engaging and clearly linked with the brand.
- **Consider boosting campaigns with 30" over 20" ads to increase awareness impact with linear radio.** Since 30" formats outperform 20" formats by +40–45%, prioritize longer formats for brand-building campaigns, complex messaging, or when media pressure is limited.

## ADDRESSABLE AUDIO GREATLY ENHANCES EFFECTIVENESS

- **Explore persona-based addressable ads in audio to increase potential impact.** Persona-based messages outperform both regular 20" and product-based formats, delivering +68% higher impact. Integrate audience data to tailor openings, tone, and examples to listener characteristics.
- **Layer formats to increase impact.** Combining the host-read with a pre-roll increase its impact with +22%. Potentially, by priming the audience with a first contact with a pre-roll can serve as an awareness reminder by the time the host read starts playing.



# More information about **Context Lab**

## **References**

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MeMo<sup>2</sup> a Kantar Company  
Context Lab  
LIFT+ Powered by THX.

## **Contact**

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Ole.delaPorte@kantar.com

# Appendix



# BACKGROUND INFORMATION

## READING GUIDE

**Audience:** Male/Female platforms users between the ages 18-65 living in the Netherlands.

**Significance:** There is a significant score when the difference between norm has an  $\alpha$  up to .05.

### Brand Metrics:

**Top-of-Mind Brand Awareness:** % of the audience that mention the exposed brand first when asked to think of brands within the exposed brand category (open question).

**Spontaneous Brand Awareness:** % of the audience that mention the exposed brand when asked to think of brands within the exposed brand category (open question).

**Aided Brand Awareness:** % of the audience that claims they have heard of exposed brand from a selection of four brands within the exposed brand category (multi-select).

**Brand Favorability:** % of the audience that has a (1) somewhat positive or (2) very positive attitude toward the exposed brand (single-select, Scale 1-5).

**Message Recall:** % of the audience that connects the exposed brand to the message of the campaign from a selection of four brands within the exposed brand category (single-select).

## QUALITY ASSURANCE



### Representativeness:

1. To strip away the influence of brand and creative as much as possible, we tested the **same brand and a similar creative** in all conditions.
2. **All data has been calibrated** to the average Italian demographic by gender, age and platform usage. Control and exposed groups are balanced on gender, age and brand usage.
3. In order get to an impact factor, we look only at **outcome measures that show an impact:** a significant difference between exposed and control.

### Calculation:

1. Significant uplifts were realized on **ad awareness and brand awareness** (multiple levels), which were therefore included in the calculation.
2. Uplifts are **indexed against total platform performance** and **aggregated into one average:** the impact factor.
3. Impact factors are **connected to previous studies** to compare impact across channels.

## DISCLAIMER\*

This study does not look at...

1. **Frequency:** Each participant will see the ad once. Therefore, no statements can be made about optimal contact frequencies.
2. **Reach:** Only platform users were allowed to participate in this study. To achieve a measurable impact in 'the real world' on brand and communication outcomes, sufficient reach behind the right formats and platforms is a prerequisite for impact.
3. **Multi-media** impact: Participants are exposed to one platform and are only allowed to participate in the study once. Therefore, no statements can be made about any cross-platform synergies.

# TEST CONDITIONS

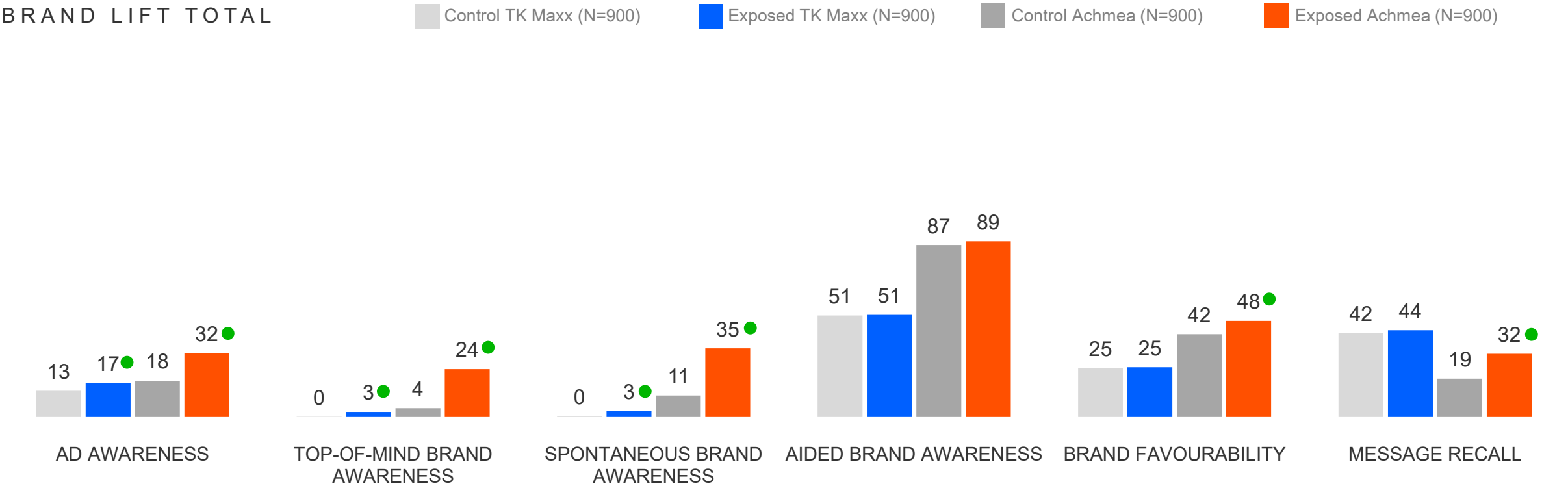
All formats are tested three times (3xN=100), once with motoric distraction, once with cognitive distraction, once without distraction.

| ENVIRONMENT            | FORMAT                       | TK MAXX | ACHMEA  |
|------------------------|------------------------------|---------|---------|
| Music streaming        | 20" Pre-roll                 | N=300   | N=300   |
|                        | 20" In-break                 | N=300   | N=300   |
| Linear radio           | 30" In-break                 | N=300   | N=300   |
|                        | 20" Addressable persona      | N=300   | n/a     |
|                        | 20" Addressable product      | N=300   | n/a     |
| Online radio streaming | 20" In-break                 | N=300   | N=300   |
|                        | 30" In-break                 | N=300   | N=300   |
| Podcast streaming      | 20" Pre-roll                 | N=300   | N=300   |
|                        | Host-read                    | N=300   | N=300   |
|                        | 20" Pre-roll + 90" Host-read | N=300   | N=300   |
| Total                  |                              | N=3.000 | N=2.400 |

# Appendix - Podcasts



# Brand uplifts – Podcasts



# Demographic – Podcast

## PLATFORM METRICS

Study average (N=5.400)

Podcast (N=1.800)

