

The Creative Imperative in Audio Advertising

What the evidence says about creative quality, voice, and performance in audio

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ABSTRACT

This paper synthesizes research on the role of creative quality in audio advertising effectiveness. The evidence is consistent: creative — encompassing script, voice, music, and structure — is the primary driver of audio ad performance, yet it remains systematically underinvested relative to its measured impact. Audio has matured into a mainstream channel with over \$38 billion in global ad spend and strong ROI benchmarks. The gap between what creative can do and what brands actually put into it is one of the most significant and addressable inefficiencies in modern advertising.

1. The Channel: Audio in 2025

Audio advertising reached genuine scale in 2025. The global audio advertising market was valued at over \$38 billion, with streaming audio ad spend growing at 9–14% year-on-year.^[1] Podcast ad spending tripled to \$6 billion in the first half of 2025 compared to the same period in 2024.^[2] Digital audio overtook traditional radio in absolute spend share for the first time, holding a 65.3% share of audio advertising wallet.^[1]

On the audience side, Nielsen reported that US consumers spent 3 hours and 50 minutes per day with audio in Q2 2025, with 64% of that time on ad-supported platforms.^[4] Edison Research's Q1 2025 Share of Ear data showed AM/FM radio accounting for 66% of ad-supported audio time among 25–54-year-olds, with podcasts at 18% and streaming audio at 12%.^[2]

\$38B+

Global audio advertising market value, 2025

IAB / eMarketer, 2025 ^[1]

3h 50m

Daily audio consumption per US consumer, Q2 2025

Nielsen, Q2 2025 ^[4]

64%

Share of listening time on ad-supported platforms, 2025

Nielsen, Q2 2025 ^[4]

65.3%

Digital audio's share of total audio ad wallet, 2025

IAB / RadioActive Media, 2025 ^[1]

What did not keep pace with channel growth was the quality of creative deployed into it. Kantar's assessment of digital audio effectiveness identified this directly: the modest per-exposure performance seen in their norms "points to a lack of understanding of how these ad types should work, rather than an intrinsic fault with the channel itself."^[5] Industry analysis consistently found that audio ads were frequently repurposed from other media rather than designed for the format.

"Online audio advertising is still a growing craft. Not all advertisers have found the formula for highly engaging audio creative." — Kantar ^[5]

2. Creative as the Performance Variable

2.1 The ROI evidence and the perception gap

Nielsen's 2025 Annual Marketing Report documented a stark disconnect between how CMOs perceived audio and what the ROI data showed. CMOs ranked AM/FM radio last in effectiveness at 46% — yet Nielsen's own data found radio delivered the second-highest ROI of any measured channel at \$2 per dollar spent, behind only social media (\$2.22) and ahead of display (\$1.52), search (\$1.16), and connected TV (\$1.15).^[2]

This is not a channel problem. It is a creative and perception problem. The channel performs. The creative deployed into it frequently does not maximize that performance — and the industry's misperception of audio's value leads brands to underinvest before they even reach the creative decision.

Veritonic's analysis of audio ad creative across podcast and broadcast radio campaigns found that creative quality — specifically voice, sonic branding, music, and structure — drives performance lift as much as media placement decisions.^[6] Optimizing targeting and media placement while underinvesting in creative is spending on the wrong variable.

2.2 What strong creative actually does

The research base converges on specific, measurable creative elements that drive audio ad performance. The findings below draw from verified primary studies:

CREATIVE ELEMENT	MEASURED EFFECT	SOURCE
Sonic branding (jingle / audio logo) in podcast ads	+14% ad recall; +2% purchase intent	^[6]
Sonic branding in radio ads	+17% ad recall; +6% purchase intent	^[6]
Sung or spoken brand name in audio logo	7.5× more likely to be correctly associated with advertiser	^[6]
Music in podcast /	+4% recall; +5% purchase intent; +3% energetic emotion	^[6]

radio ads		
7+ brand mentions in podcast ad	77% recall vs. 59% for 1-2 mentions	[7]
Emotional storytelling (vs. promotional)	Higher engagement, brand connection, and listener action; humor specifically identified as a driver of ad receptivity across Gen X-Z	[8],[9]
Host-read podcast ad (vs. produced spot)	+50% purchase and recommendation intent	[7]
Personalized audio vs. generic spots	+22 points brand favorability (Instreamatic / Dentsu case)	[10]
30-second ad length	Outperforms other durations on engagement, brand effect, recall, trustworthiness, and relevance	[6]

The IPA Effectiveness Conference 2025 added structural support for the music finding: MassiveMusic and the IPA's joint analysis of the IPA Effectiveness Databank identified music choice as a material variable in campaign effectiveness — not merely a background element but a strategic driver of emotional framing and recall.^[11]

Kantar's Ad Reaction research reinforces the humor and emotion findings: humor is the most powerful enhancer of ad receptivity across generational cohorts from Gen X to Gen Z, provided it is calibrated to channel expectations and brand personality.^[9] A separate SiriusXM / Veritone One / System1 study found that emotional storytelling in audio specifically — using unique characters, clear setting, and humor — drove listener action, while ads mixing brand-building and promotional messaging performed worst of all, likely because they force listeners to switch between emotional and analytical processing within the same spot.^[8]

2.3 Context-matched creative

A consistent finding is the importance of creative designed for the specific listening context rather than adapted from other formats. AdsWizz's analysis of 2025 advertiser behavior found that the highest-performing campaigns used modular scripts and dynamic formats that adapt to context, mood, and environment.^[12]

Kantar reinforces this: audio ads underperform their potential not because the channel is ineffective, but because the creative was not built for how people actually listen — engaged but doing something else, intimate with the content, and quickly deciding whether an ad belongs in their moment or not.^[5]

SiriusXM Media's practitioner guidance is direct: script quality, voice selection, and production craft are not outputs of the media plan — they are inputs to performance. "Just like a script or music choice, voice talent can make or break an ad for listeners."^[13]

3. The Scale Argument

One of the most practically significant recent developments is that creative quality at scale is no longer a contradiction. AI-assisted production has substantially lowered the barrier to producing multiple high-quality creative variants without proportionally

increasing cost or time.^[14]

Instreamatic's case work with Dentsu found that personalized audio increased brand favorability by 22 points versus generic spots for a major electronics brand.^[10]

AdsWizz reported that modular, dynamically assembled audio creative became a standard feature of high-performing campaigns in 2025.^[12]

The argument that speed or budget prevents investing in better creative is weaker than it has ever been. What remains is the strategic decision: whether creative quality is treated as a priority or as a checkbox after the media plan is done.

4. The Persisting Gap

Despite strong ROI evidence, audio creative remained underinvested in 2025. Nielsen's Annual Marketing Report noted that 54% of global marketers reduced ad spend, with only 32% measuring traditional and digital media holistically.^[2] Budget pressure typically hits creative first — which, given that creative drives performance outcomes more than media placement, is precisely the wrong place to cut.

The perception gap — CMOs rating audio last in effectiveness despite its second-place ROI ranking — has a direct downstream effect on creative budgets.^[2] If the channel is not believed to perform, the creative deployed into it will not be resourced to perform. The feedback loop produces the mediocre results that confirm the original misperception.

The evidence is clear. Audio performs. The ROI is documented. The attention is real. What remains is building creative that deserves the channel.

5. Research Gaps

GAP No large-scale meta-analysis equivalent to NCSolutions' five-keys framework exists specifically for audio creative. The evidence on individual creative elements is strong across industry and academic sources, but it is not yet unified in a single rigorous study with standardized methodology across all variables.

GAP Context-matching effects have strong qualitative and practitioner support but limited controlled empirical measurement at scale. The performance difference between context-designed and repurposed audio creative has not been directly quantified in peer-reviewed research.

GAP The long-term brand equity compounding effects of consistent sonic identity — as distinct from single-campaign creative quality — remain underexplored. The Veritonic / Audacy study provides a starting point, but longitudinal data across brand categories is not yet available.

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Companion paper: This paper focuses on the creative quality dimension of audio advertising effectiveness. A companion paper — *AI vs. Human Voice in Audio Advertising: Detection, Trust, and Brand Risk* — examines the specific role of voice choice in creative decisions, including the evidence on consumer detection of AI voice, trust differentials, and neurological response. The two papers are designed to be read together.