



See Radio Differently

Lucy Barrett

See radio differently

Putting Radio in Context

Commercial Audio
Listening

Why Radio

Proof of effectiveness

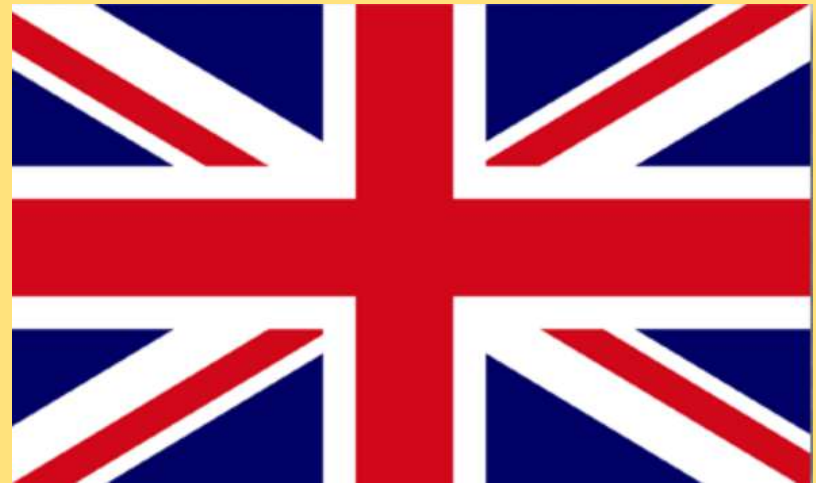
Creative excellence



See radio differently

The Global Audio Landscape

88% of the population
listen to radio every
week



92% of the population
listen to radio every
week



95% of the population
listen to radio every
week



75% of the population
listen to radio every
day



77% of the population
listen to radio every
month



79% of the population
listen to radio every
month



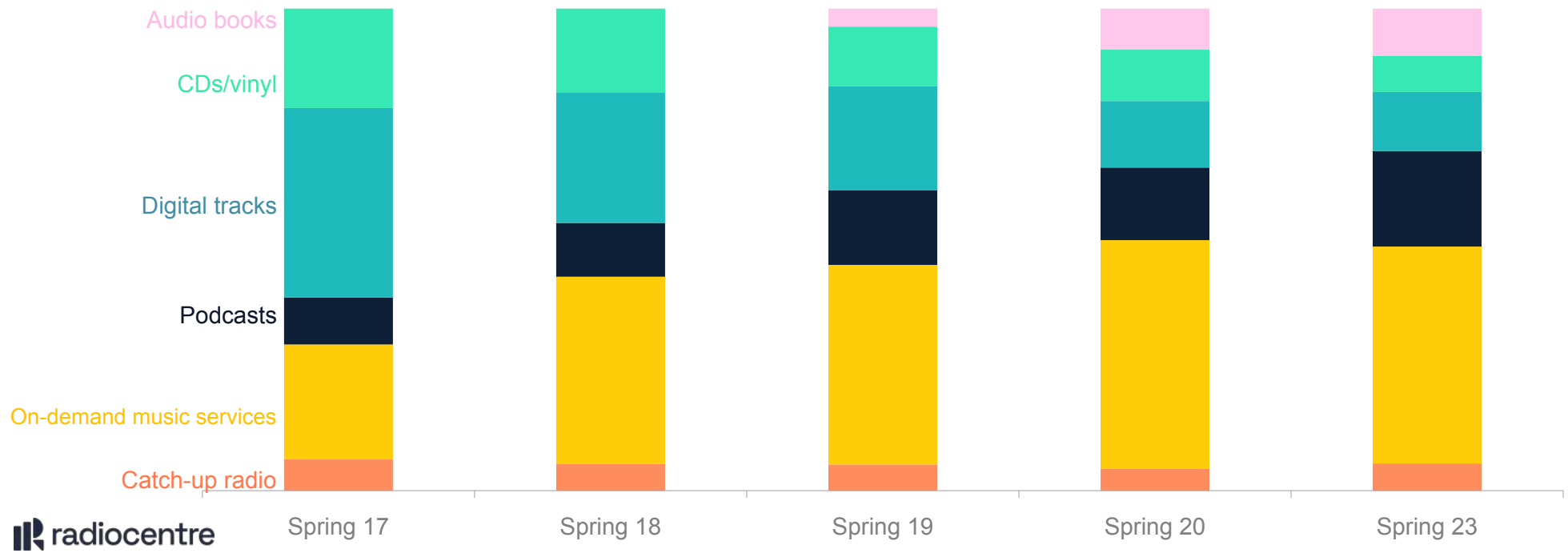


5+ billion adults listen
to radio every day for an average
of 3 hours

The Audio Revolution

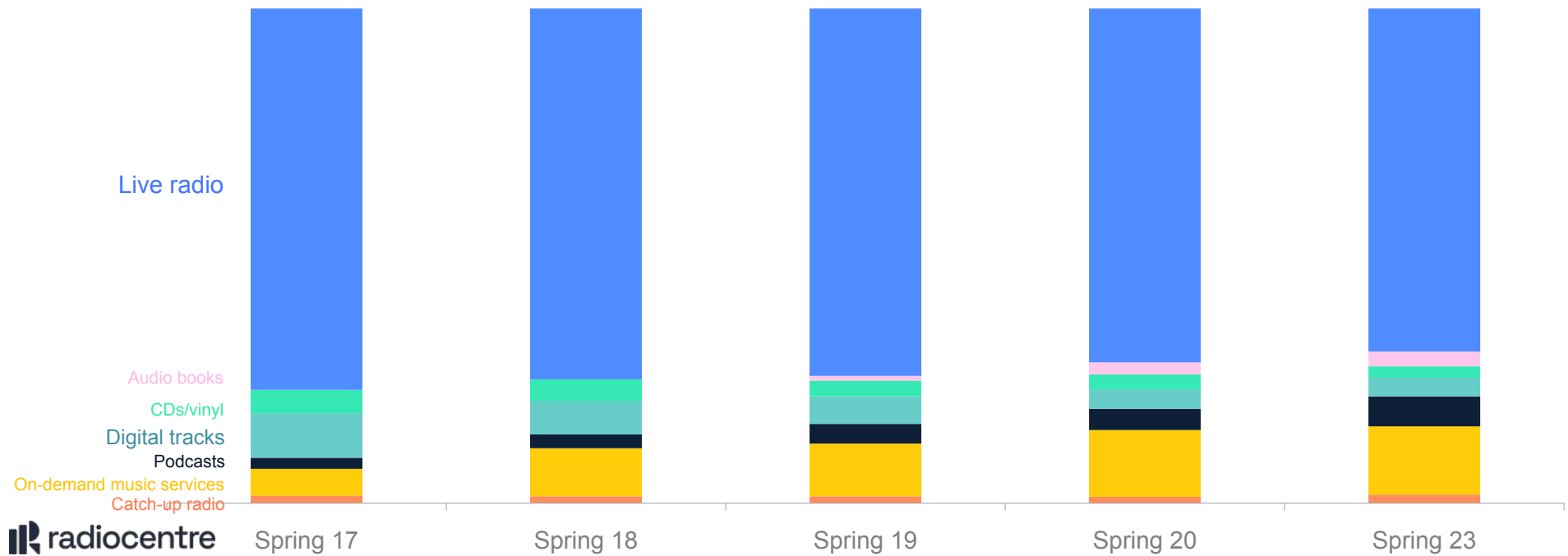
On demand

Share of weekly on-demand audio listening hours



Live radio continues to dominate listening

Share of weekly on-demand audio listening hours



Digital platforms make radio even more accessible

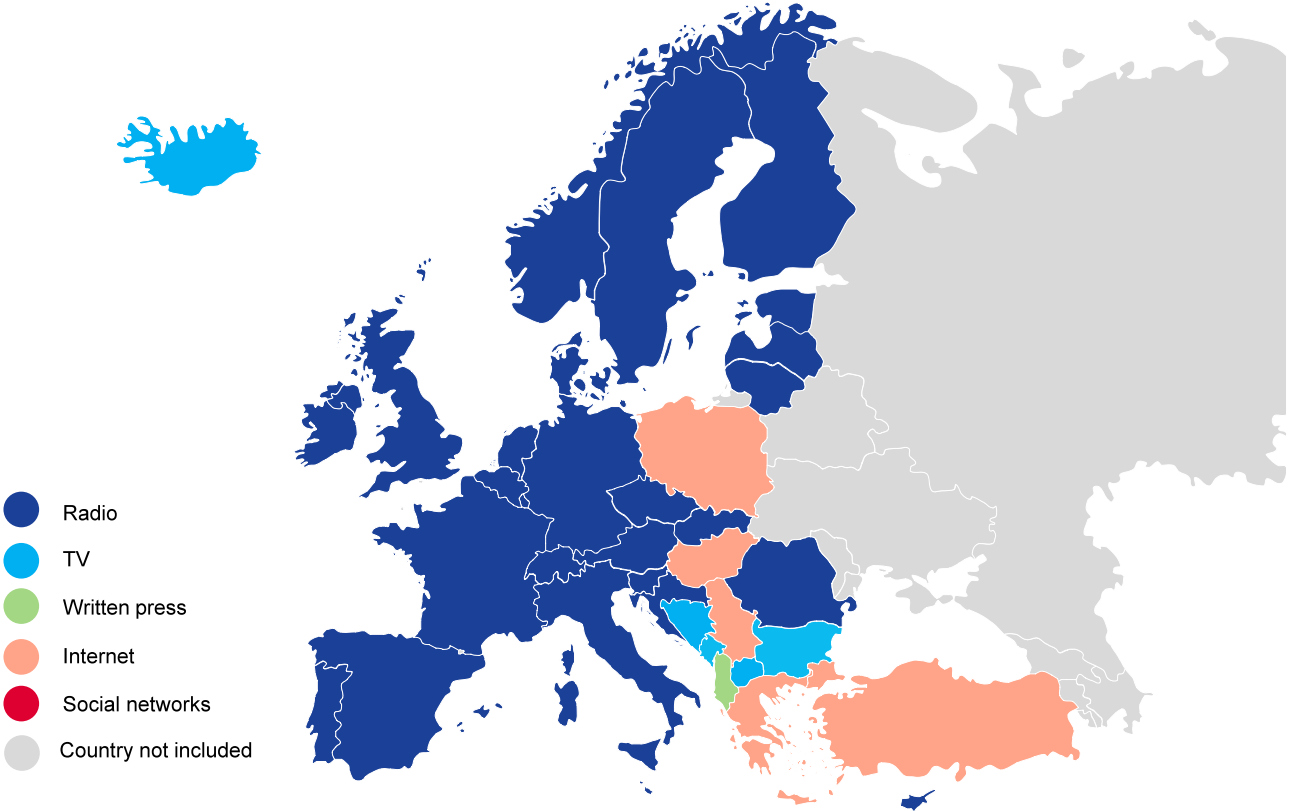


“Radio is still the most important platform to break new artists”




MOST TRUSTED MEDIA

(Net Trust Index 2022)

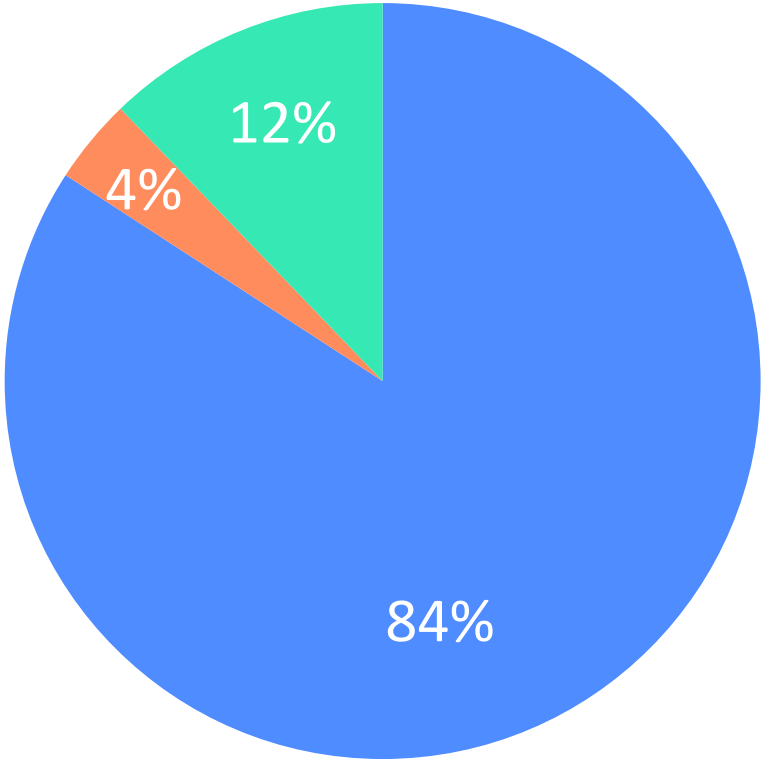


The commercial audio audience

39 million adults 
**listen to commercial radio for 14
hours every week**

Share of Commercially accessible audio hours

Total Commercially accessible Hours

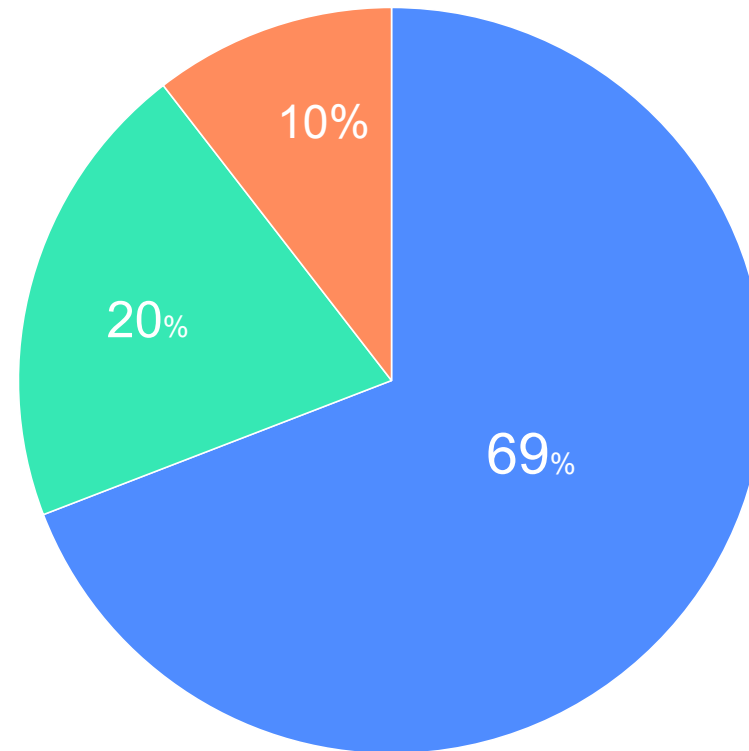


■ Live Commercial Radio ■ On-demand music (free with ads) ■ Podcasts (Exc BBC)

Base: Live & Catch up Commercial Radio, Non BBC Podcasts, Listeners whose main On-Demand Streaming service is 'free- with ads',

Commercial Radio remains the audio medium to reach 15 -34s

Total Commercially accessible Hours



■ Live Commercial Radio ■ Podcasts (exc BBC) ■ On-demand music streaming (free with ads)



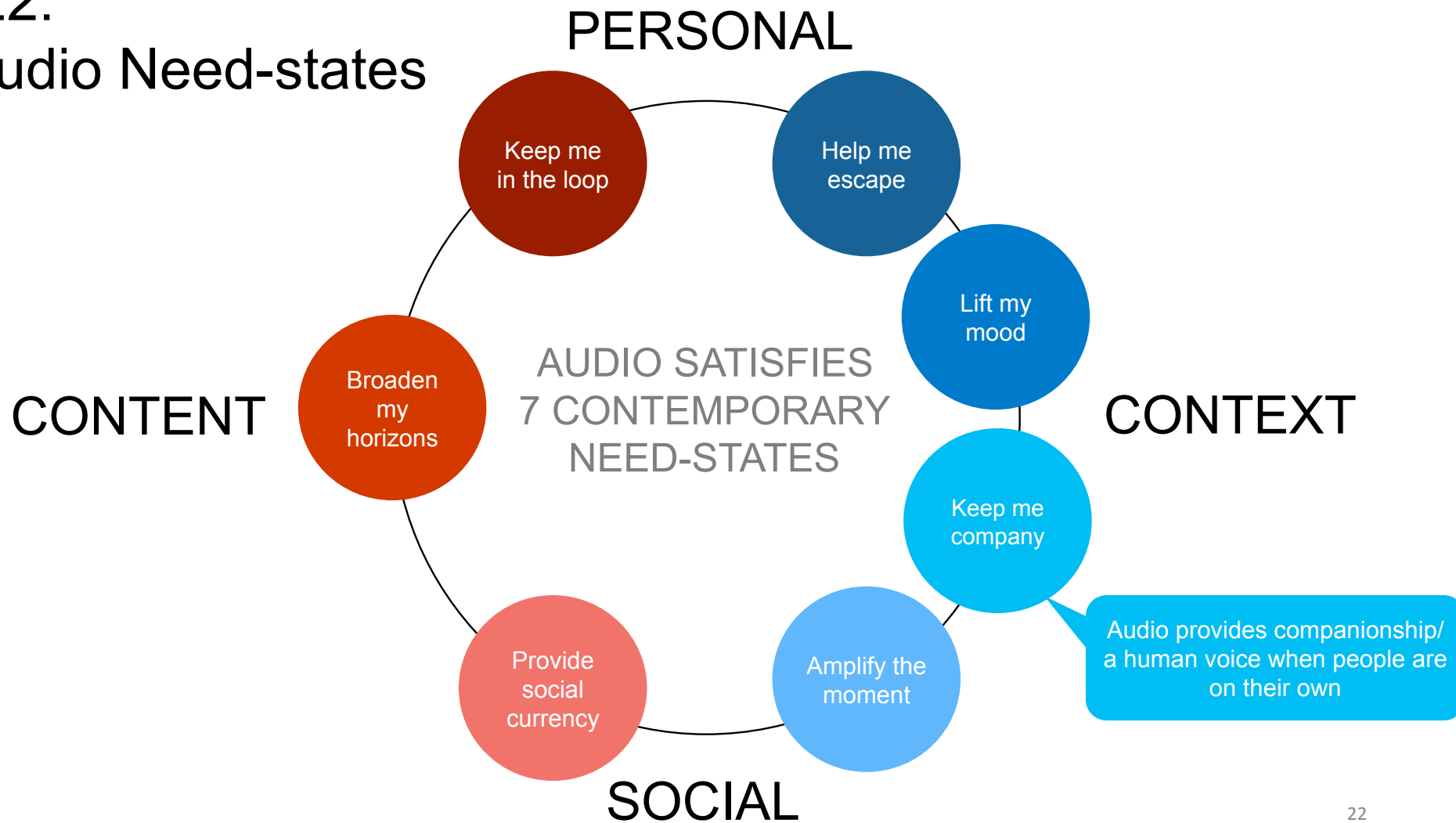
Base: Live & Catch up Commercial Radio, Non BBC Podcasts, Listeners whose main On-Demand Streaming service is 'free- with ads',

RAJAR MIDAS Spring 23: Commercially accessible audience



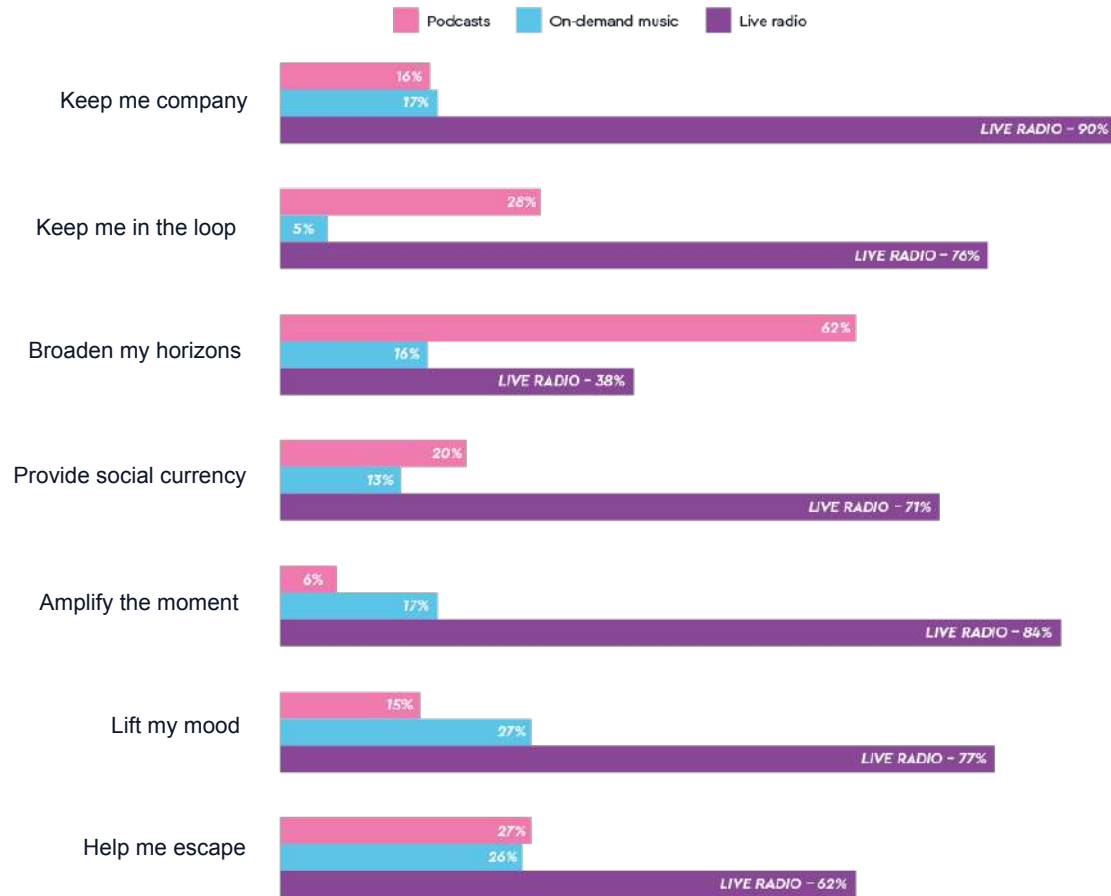
GENERATION AUDIO

2022: 7 Audio Need-states



Live radio has the highest weekly reach within 6/7 need-states

Weekly reach % (proportion of listeners within each need-state reached by audio format)

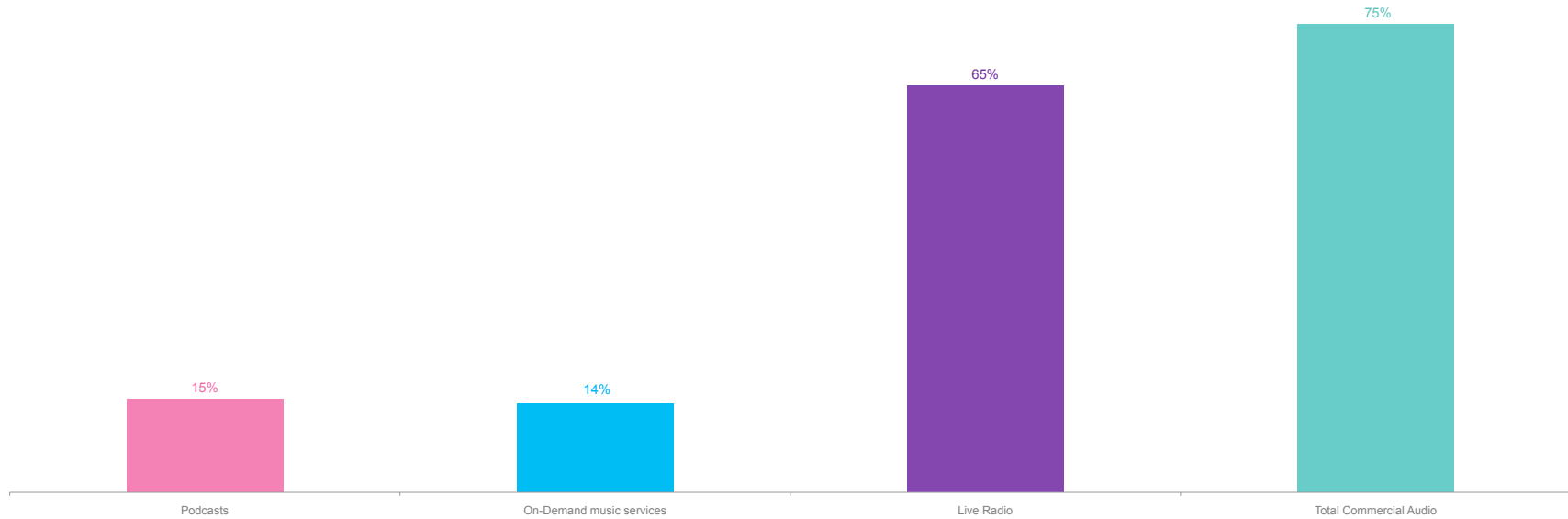


Source: Generation Audio, Radiocentre/Differentology 2022

Base: 1,000 weekly commercial audio listeners

Use Live Radio plus on-demand audio formats to maximise reach

Weekly adult reach % by commercial audio format



Base: Live Commercial Radio; Non-BBC podcasts; Ad-funded (free subs) On-Demand music services

Source: RAJAR MIDAS Summer 2022

Commercial radio has more publicly available effectiveness research than any other medium

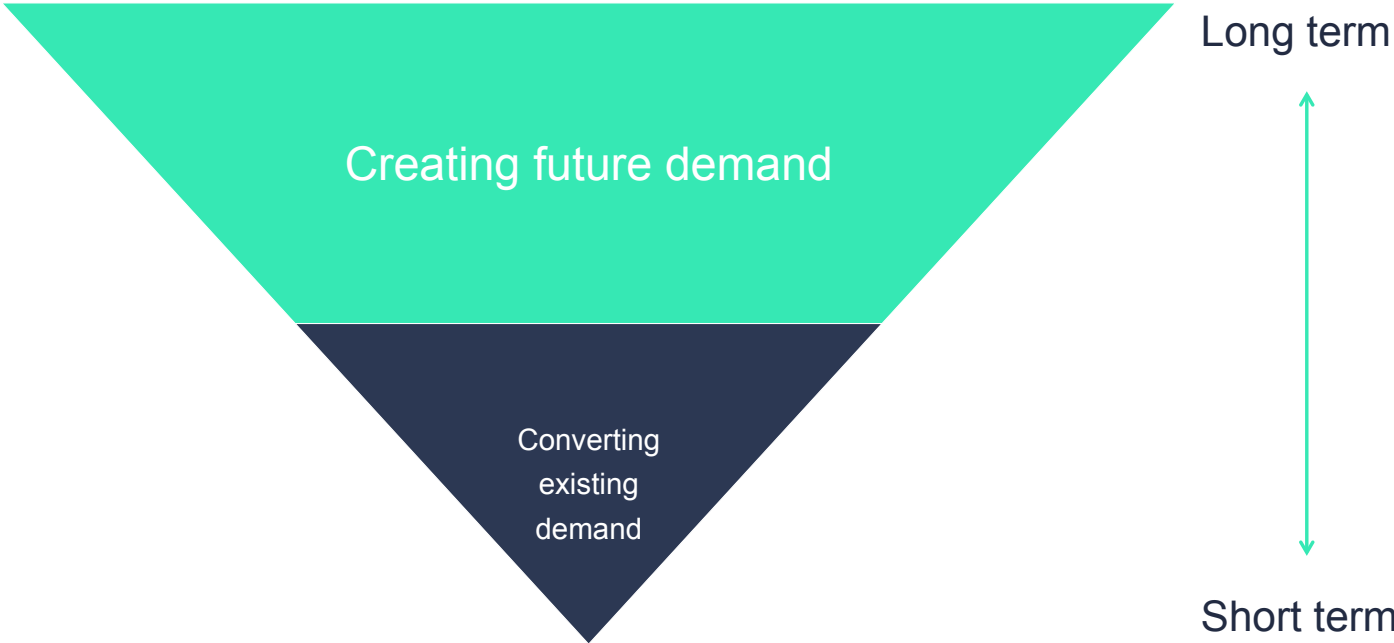
See radio differently

Why radio?



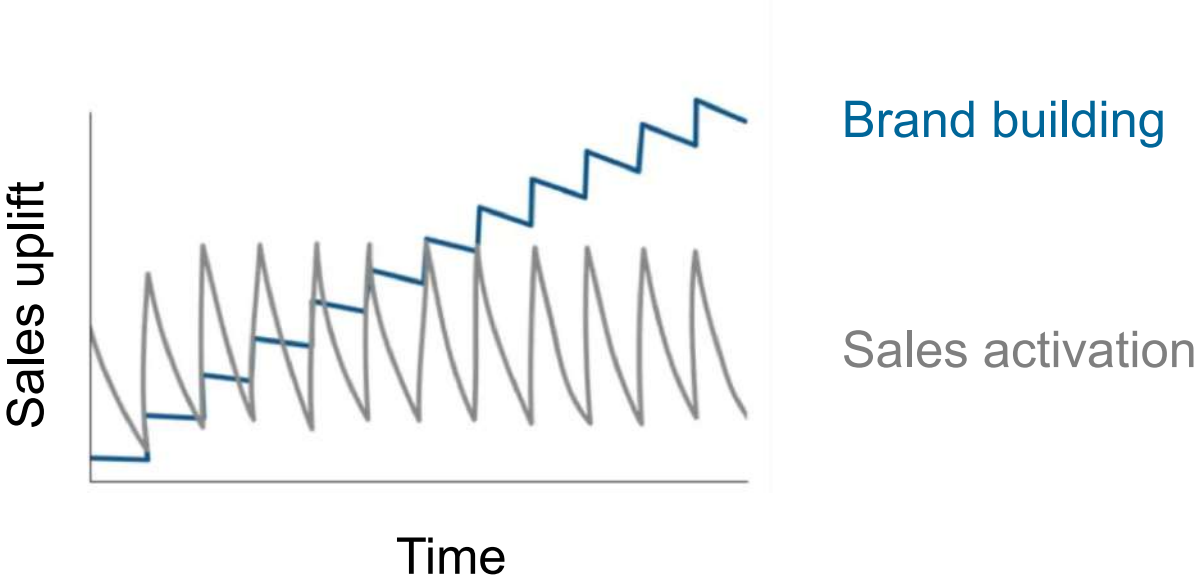
 radiocentre

The two main roles of marketing



60% brand building / **40%** short-term
activation

Long term brand building (creating future demand) vs. short term activation (converting existing demand)



Why radio?

Creating future demand

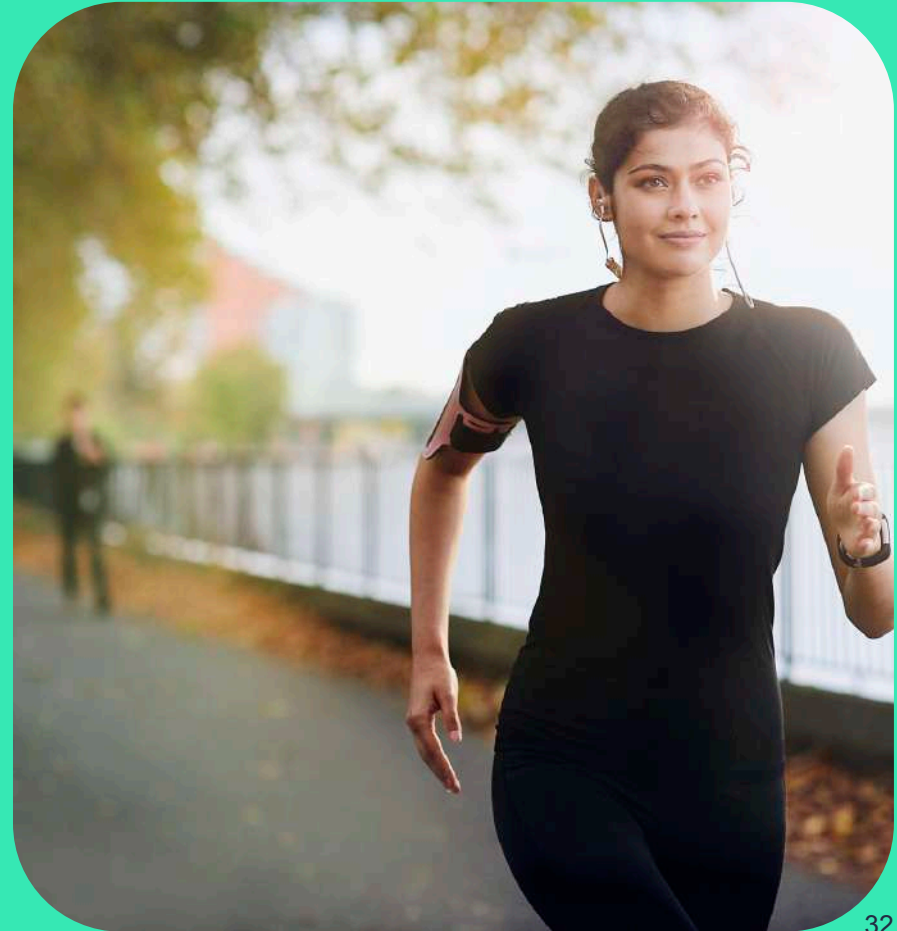


Creating future demand

- Reach
- Emotion
- Salience

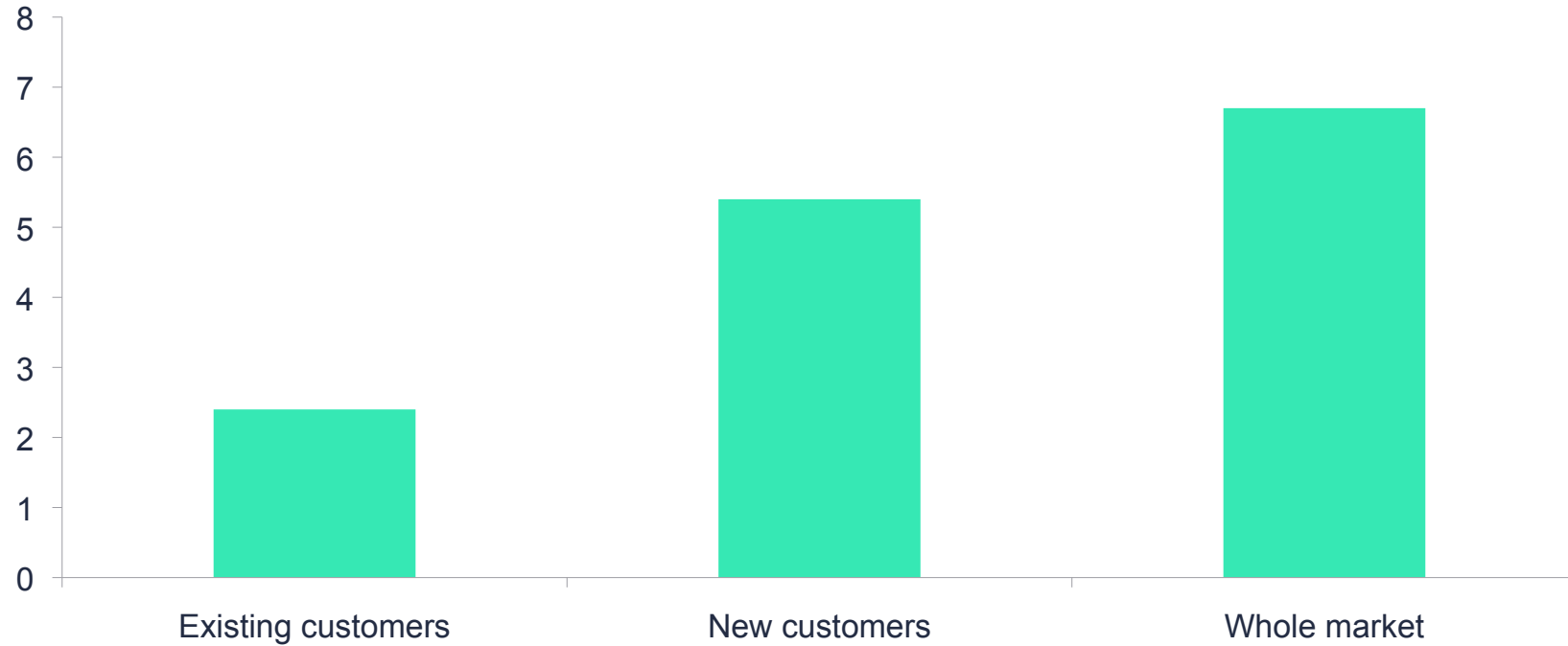



1. Reach



The broader the reach, the broader the effects

Average number of large business effects reported



On average radio
increases ad awareness
by **49%** 



34

Source: Big Audio Datamine, base 841 campaigns

Best practice tip

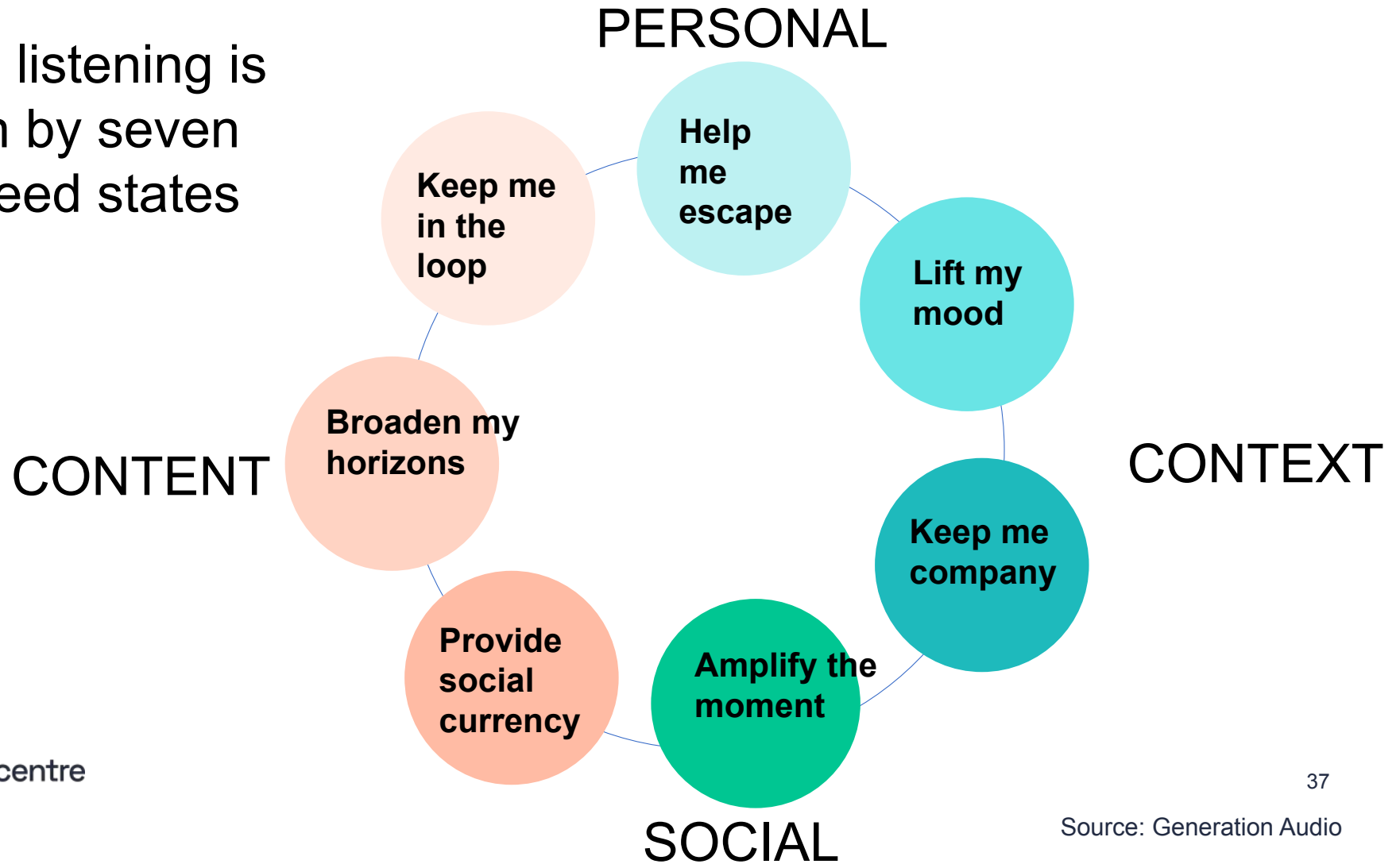
**Increasing weekly reach has
twice the impact on ad
awareness than increasing
weekly OTH (opportunities to hear)**

Source : Big Audio Datamine

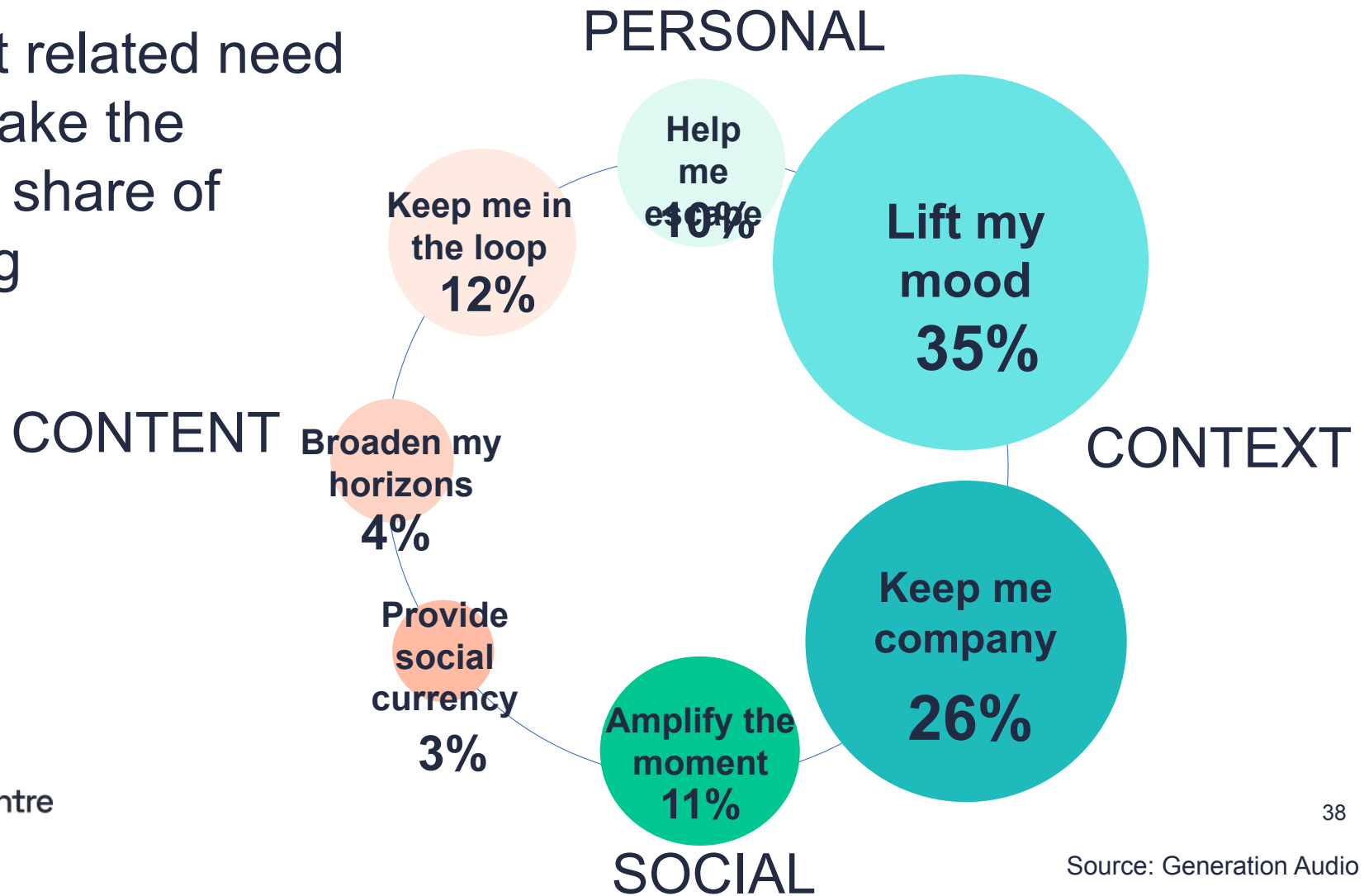
2. Emotional connection



Audio listening is driven by seven key need states

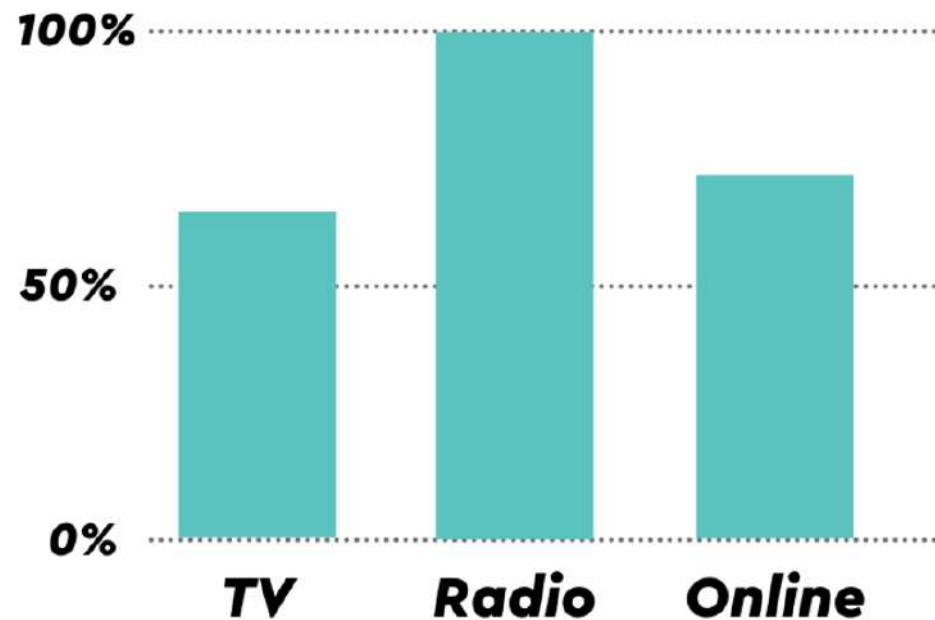


Context related need states take the highest share of listening



People feel twice as happy when listening to radio

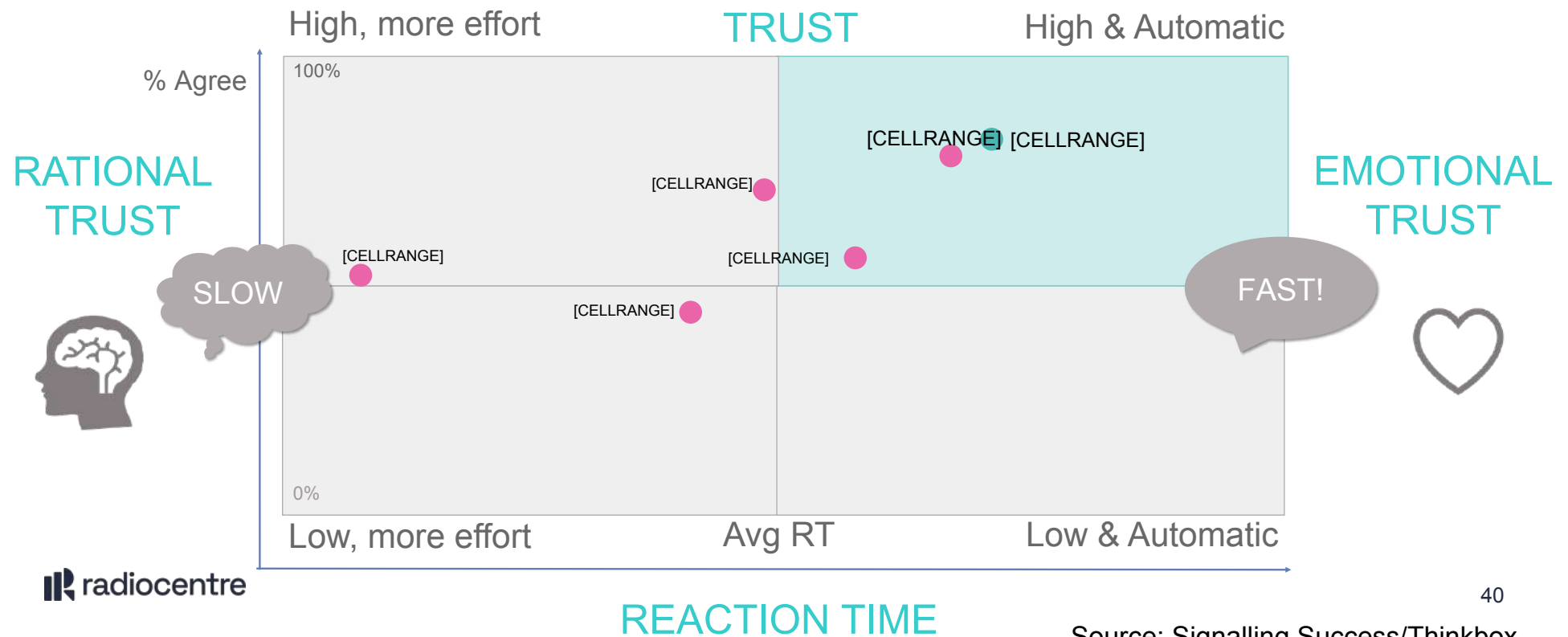
Average increase in happiness vs. when not consuming any media



“Radio in the background, humming along to a few songs, feels good!”



Radio & TV enjoy the strongest emotional trust



3. Brand salience



Share of voice

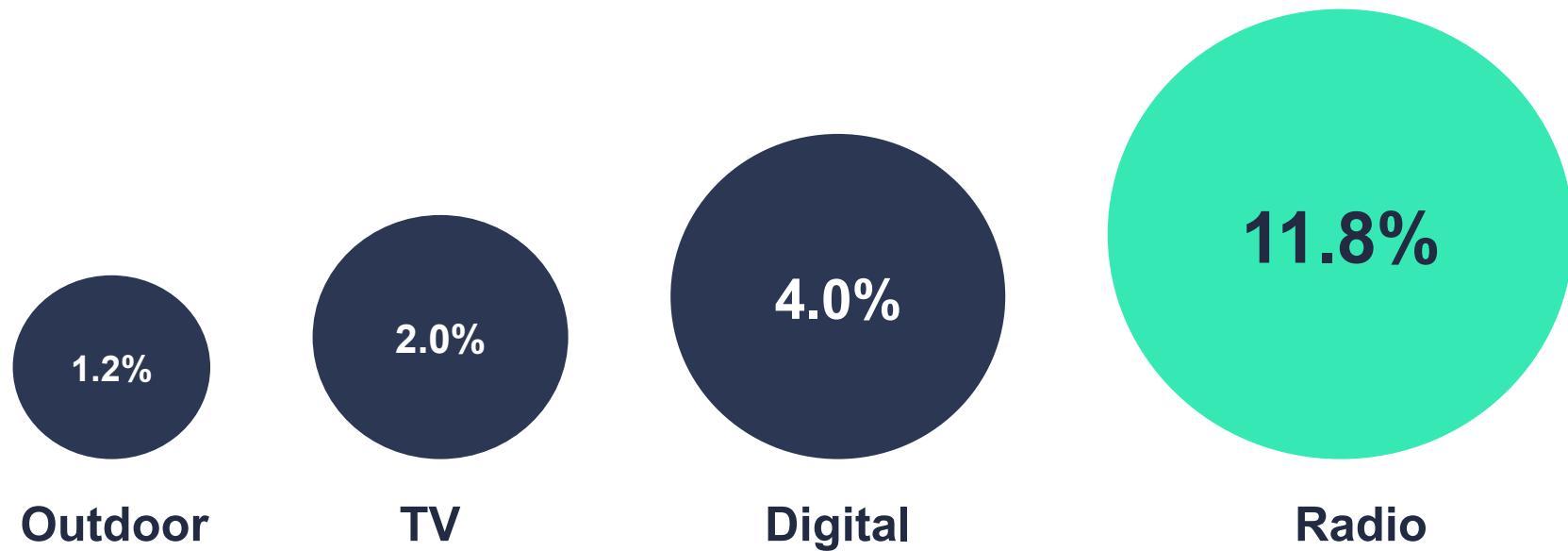


The critical metric that determines the level of a brand's market share growth is its excess share of voice (ESOV), defined as share of voice (SOV)* minus share of market (SOM).

IPA, How share of Voice wins market share

For many sectors radio can give brands much greater standout through share of voice

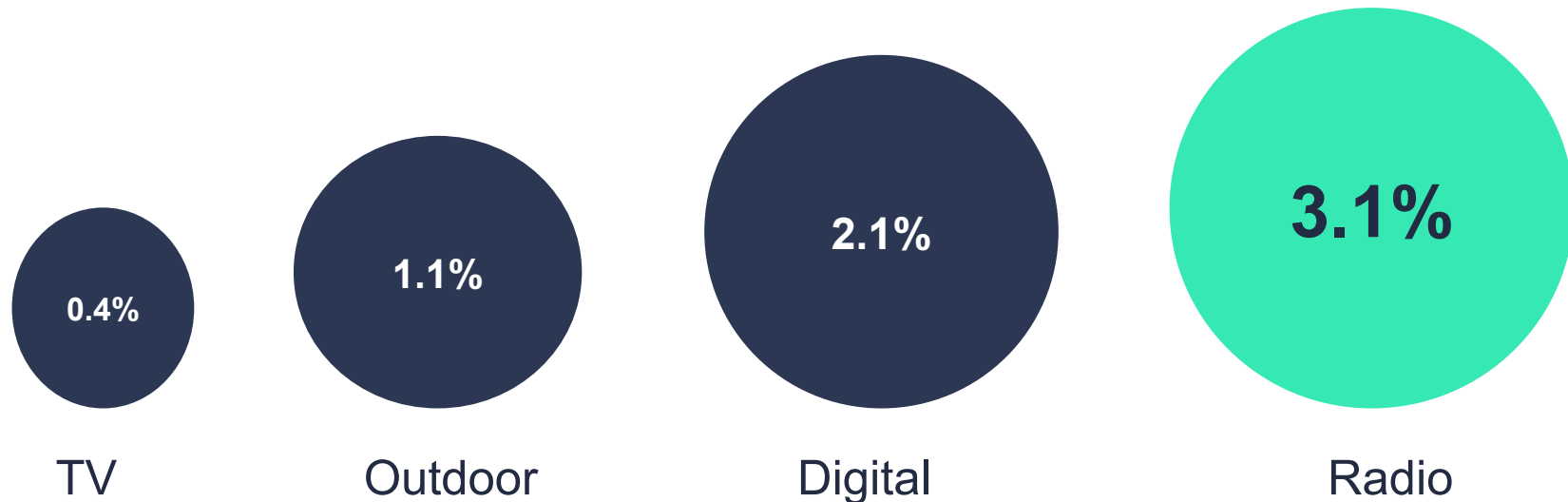
% Share of voice among drinks brands that £1m buys in each medium



Nielsen Jan-Jun 2023

For many sectors radio can give brands much greater standout through share of voice

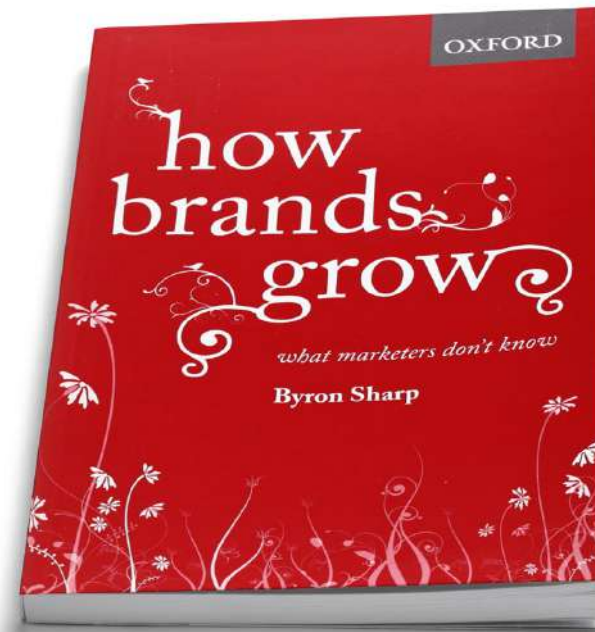
% Share of voice among food brands that £1m buys in each medium



Nielsen Jan-Jun 2023

Mental availability

How readily does a brand spring to mind when someone is in purchasing mode?

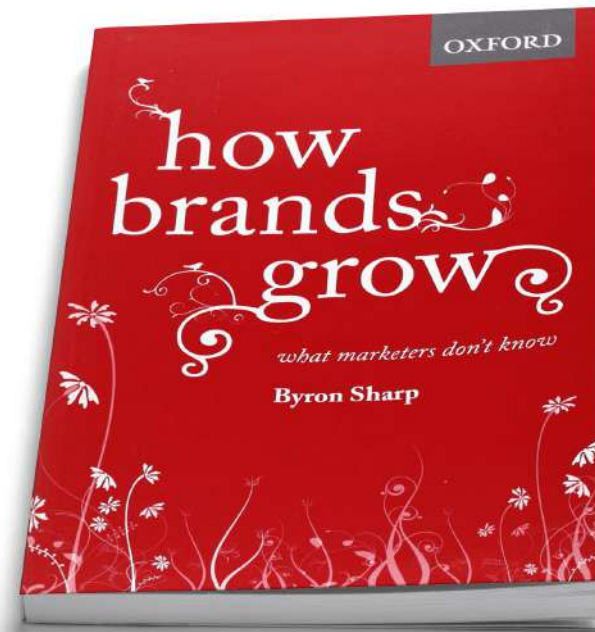


Category Entry Points

Category-specific reasons to buy

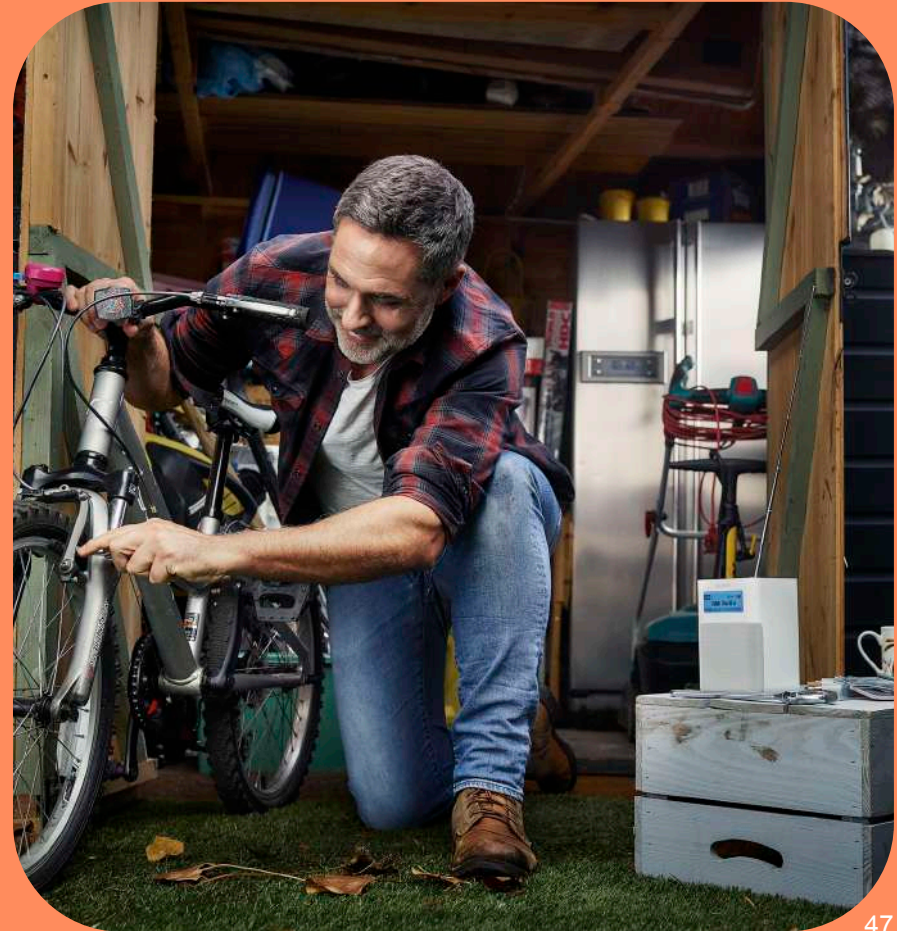


The more CEPs a brand is associated with,
the greater its mental availability



Radio and category entry points

- Relevant consumption moments
- Low production costs
- Frequency



Using radio to grow mental availability

In our Brand Multiplier study redeploying budget from TV to radio was able to increase mental availability for FMCG brands by

26%



According to IPA analysis,
campaigns reporting very large fame
effects were

60%



more likely to have used radio



Why radio?

Converting existing demand through short term activation



Converting existing demand



Just by being on radio, brand consideration increases by an average of **18%**



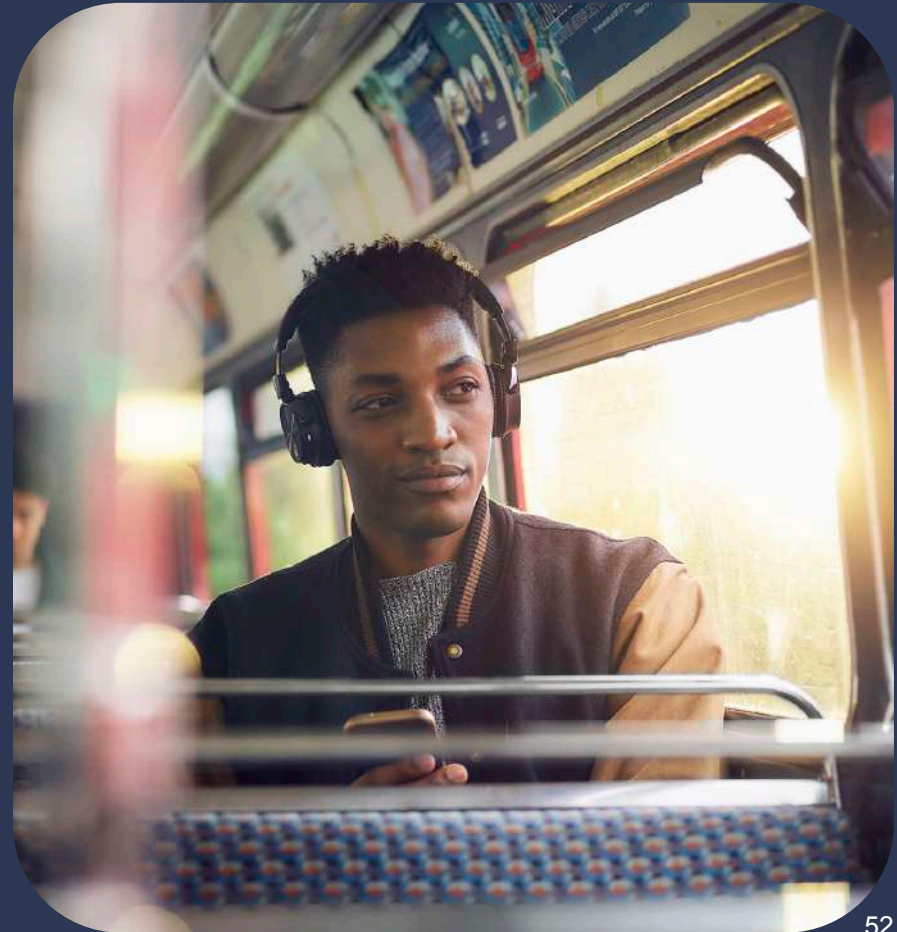
51

Source: Big Audio Datamine

Converting existing demand

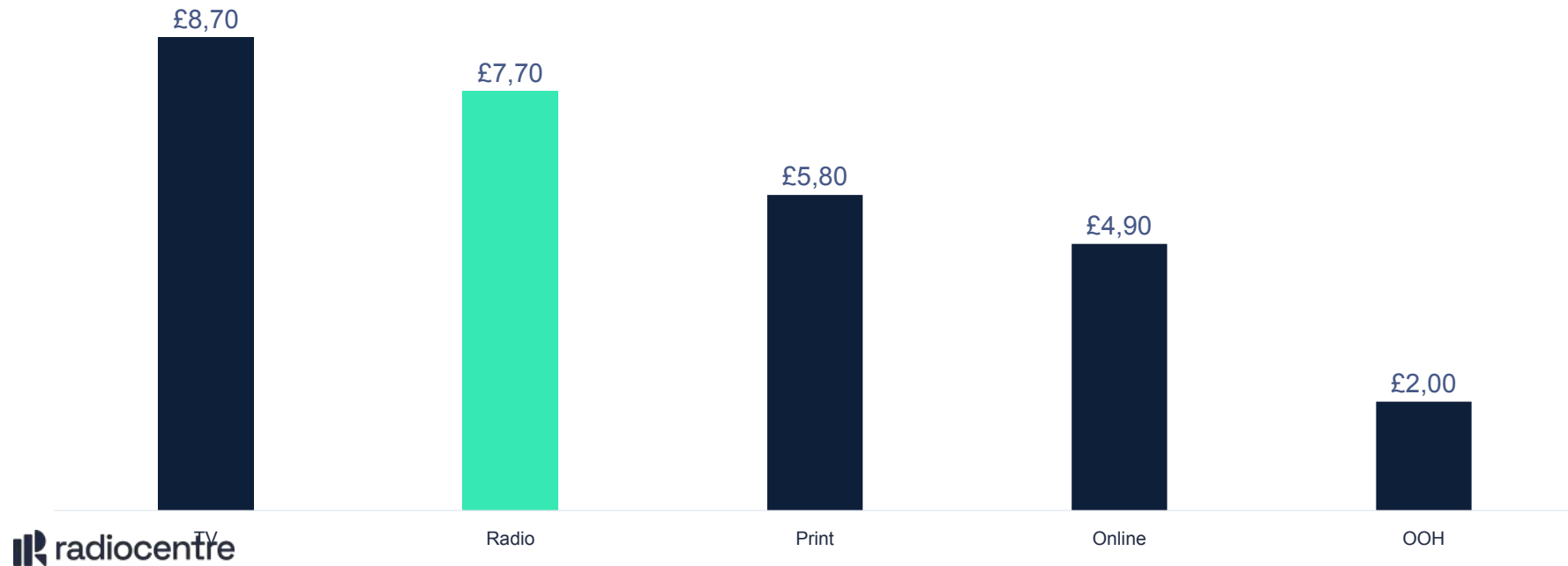


A fifth of listeners who recall hearing a radio ad claim to have searched online or gone directly to the brand's website as direct result



Radio delivers strong revenue ROI for brands

Revenue return on investment by medium



Converting existing demand

- Cost-efficiency
- Flexibility
- Targeting

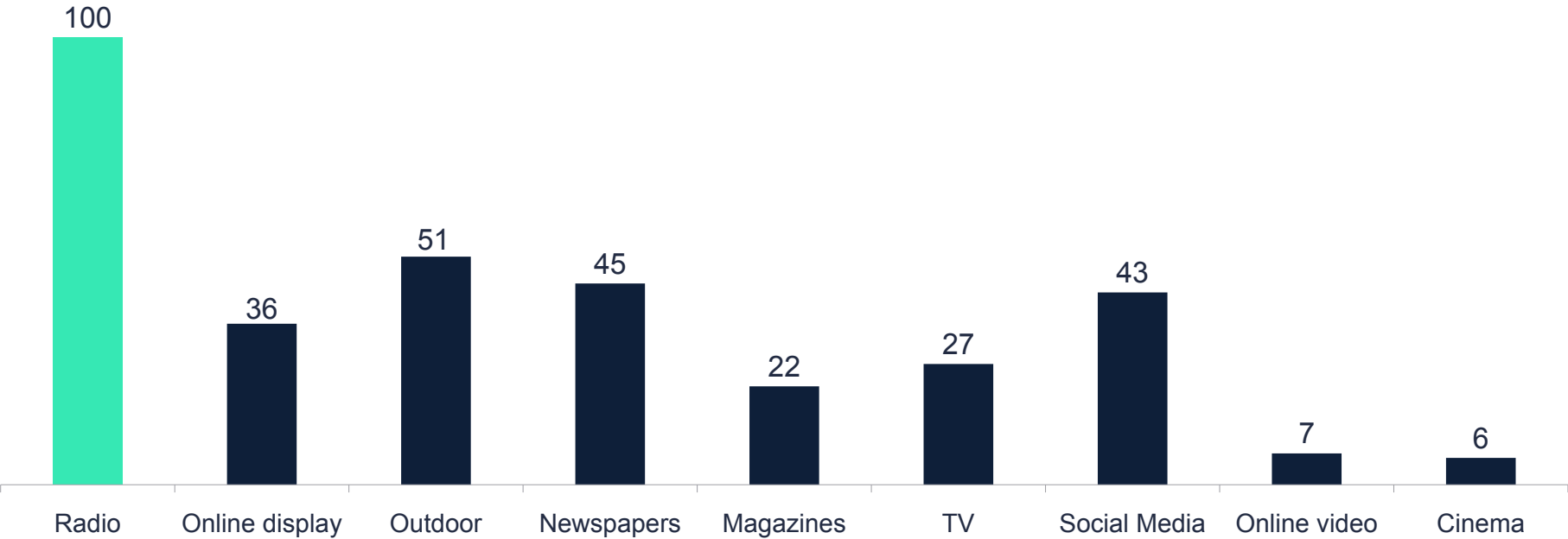


1. Cost efficiency



Cost efficiency

Ad impressions delivered by medium per £1 spend. Indexed, radio = 100



2. Flexibility



Flexibility of formats

AIRTIME

- Sponsorship
- AFP
- Website
- Podcasts
- Mobile apps
- Events
- Experiential
- Social
- Promotions
- Etc...Etc...

Long term

Short term

3. Targeting



where do advertisers and agencies rank radio out of 10 different media in its ability to target effectively?

- FIRST
- THIRD
- SIXTH

Targeting the right people in the right place at the right time

2020 - Perception

1	Social media	4.2
2	Cinema	3.9
3	Direct mail	3.7
3	TV	3.7
3	Online video	3.7
6=	Radio	3.4
6=	Online display	3.4
6=	Out of home	3.4
9=	Magazines	3.2
9=	Newspapers	3.2

PERCEPTION Mean score. Q. Using a scale of 1-5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to target the right people in the right place at the right time. Base: n=17.

Targeting the right people in the right place at the right time

2020 - Evidence

1	Radio	9
2=	Social media	8
2=	TV	8
4=	Online display	7
4=	Cinema	7
6=	Direct Mail	6
6=	Out of home	6
6=	Online video	6
9	Newspapers	5
10	Magazines	3

EVIDENCE Ebiqity's score based on whether a medium can be bought by geography, demographics, day of week, time of day, contextually, addressably (each scored 0-2 where 0=no, 1=yes with limitations, 2=yes).

2020 - Perception

1	Social media	4.2
2	Cinema	3.9
3	Direct mail	3.7
3	TV	3.7
3	Online video	3.7
6=	Radio	3.4
6=	Online display	3.4
6=	Out of home	3.4
9=	Magazines	3.2
9=	Newspapers	3.2

PERCEPTION Mean score. Q. Using a scale of 1-5 where 5 is 'very good' and 1 is 'very poor', please rate each medium for its ability to target the right people in the right place at the right time. Base: n=17.

25% of all radio listening
is online in UK



Targeting at scale with radio

- Geography
- Demographics
- Day of week
- Time of day
- Context



What percentage of radio listening occasions is accompanied by other tasks?

- 70%
- 80%
- 90%

Consumer context

Other tasks accompany 9 out of 10 listening occasions



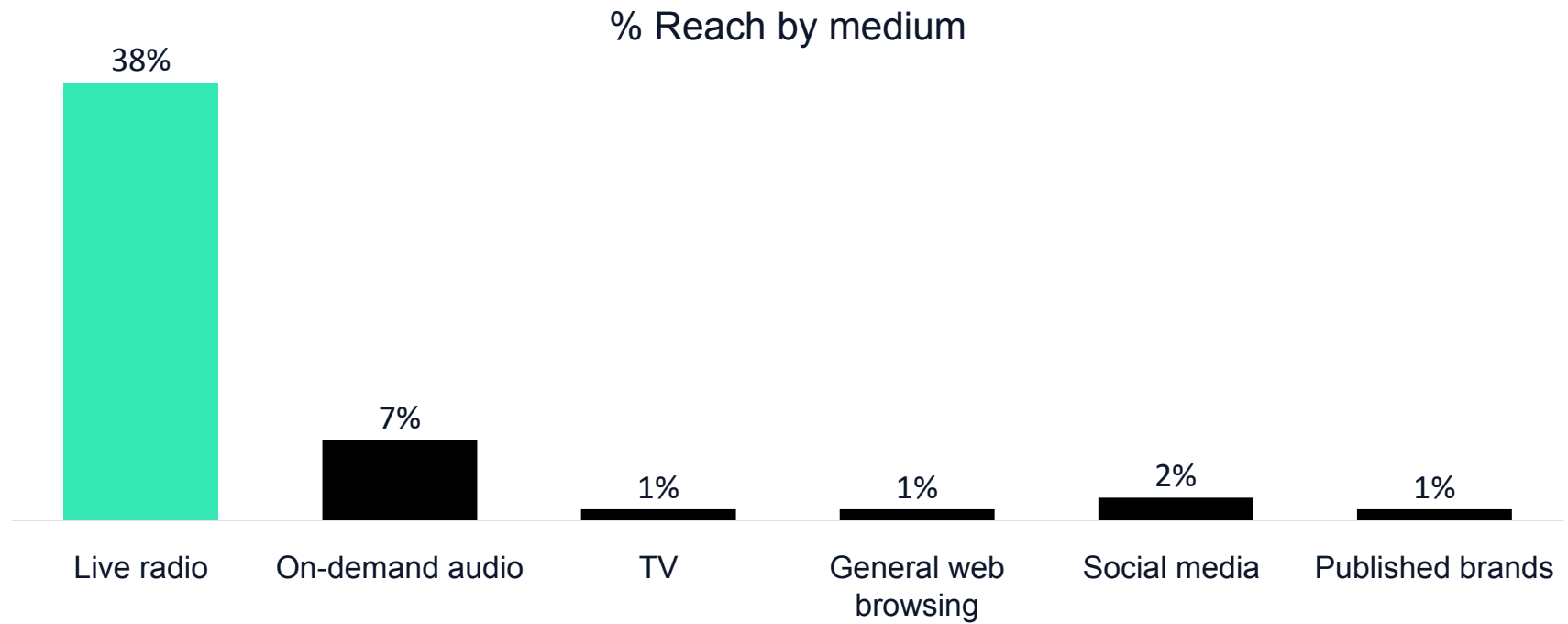
Illustration

60% of us haven't decided which brand we are going to buy before we get to the supermarket

40% of brands don't even get noticed on the shelves



Travelling by car to the supermarket



When an ad is *heard* on
the way to the shops

purchase intent increases by

33%

and brand visibility increases by

11%



Converting existing demand

Planning considerations

- Beyond micro targeting
- Consider relevant moments
- Explore adapting messaging to the moment



Case study

Strongbow

Using radio to increase customer acquisition

25,000 new customer conversions

Highest conversion rate across all media

 radiocentre





Radiogauge



Radiogauge



Ad Awareness
Brand Consideration
Brand Perceptions
Ad Recall
Creative Engagement

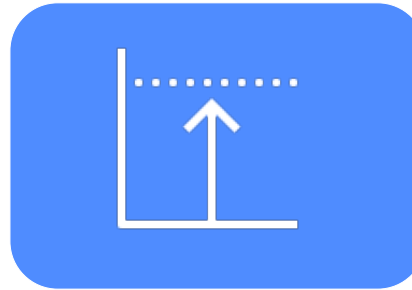
Measure the effect of your campaign



Free of charge



Understand campaign impact



Benchmark performance against competitors



Creative analysis



Brand name

Methodology

The methodology behind Radiogauge

- Post campaign analysis
- GB rep sample of 800 respondents
- Matched for gender, age and location
- Exposed vs Unexposed method
- Comparing commercial radio listeners & non-commercial radio listeners





Welcome to Radiogauge Predict, the radio effectiveness analyser.

We've aggregated effectiveness data from hundreds of radio campaigns to give you some unique insight into how radio works. Use this analyser to predict and understand what radio will deliver for your marketing campaign. Search by sector, media mix and refine data by demographics including age & gender.

For help contact: ✉ Charlie Galliver-Cooper or call ☎ 020 7010 0695

Predict radio's uplift by
sector/objective



Predict Now

Predict radio's uplift
alongside other media



Predict Now

Listen to the best
performing radio ads



Listen Now



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The image shows three circular buttons arranged horizontally. The middle button is highlighted with a thick yellow border. Each button contains text, icons, and a call-to-action button.

- Left Button:** Text: "Predict radio's uplift by sector/objective". Icons: fork and knife, airplane, shopping cart. Button: "Predict Now".
- Middle Button (highlighted):** Text: "Predict radio's uplift alongside other media". Icons: desktop monitor, laptop, tablet. Button: "Predict Now".
- Right Button:** Text: "Listen to the best performing radio ads". Icons: microphone, speaker, award ribbon. Button: "Listen Now".



1. Media

2. Audience

3. Measure

- Radio & Outdoor
- Radio & Press
- Radio & TV
- Radio Only
- Radio, Online Search & Online Display
- Radio, Press & Online Display
- Radio, Press & Outdoor
- Radio, Press & TV
- Radio, Press, TV & Online Display
- Radio, Press, TV & Outdoor
- Radio, Press, TV, Outdoor & Online Display
- Radio, Press, TV, Outdoor, Online Display & Search
- Radio, TV & Online Display

Step 1. Media

To predict the uplift effect of radio alongside other media please select the relevant media mix for your campaign



1. Media

2. Audience

3. Measure

- Radio & Outdoor
- Radio & Press
- Radio & TV
- Radio Only
- Radio, Online Search & Online Display
- Radio, Press & Online Display
- Radio, Press & Outdoor
- Radio, Press & TV
- Radio, Press, TV & Outdoor
- Radio, Press, TV, Outdoor & Online Display
- Radio, Press, TV, Outdoor, Online Display & Search
- Radio, TV & Online Display

Step 1. Media

To predict the uplift effect of radio alongside other media please select the relevant media mix for your campaign



1. Media

2. Audience

3. Measure

...

Men

Women

16-24s

25-34s

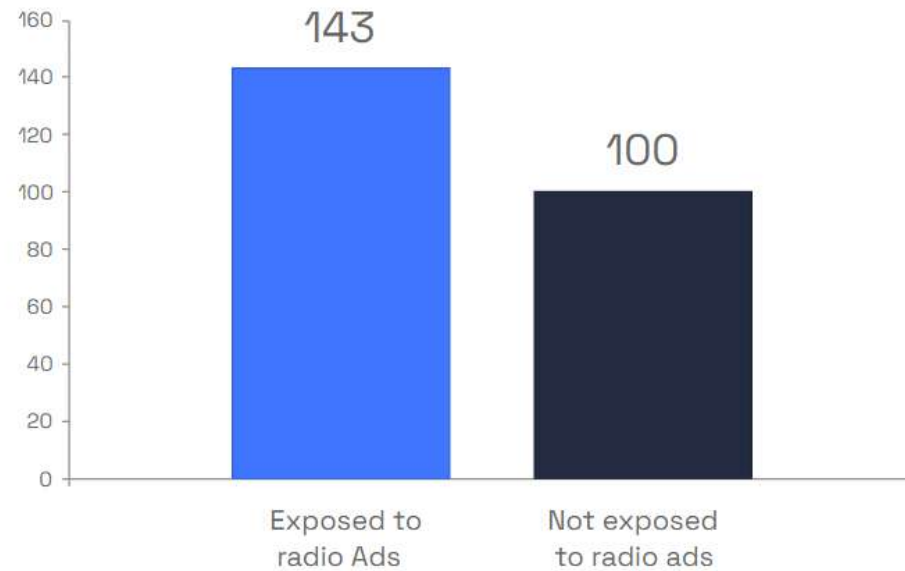
35-44s

45-54s

Radio, Press, TV & Online Display

Radio increases ad awareness by 43% when used alongside press, TV and online display

Average uplift in ad awareness, exposed to radio ads vs. not exposed to radio ads



Base: 41 campaigns using radio alongside press, TV and online display only; average radio spend £387k

Source: Radiogauge from Radiocentre

Download PDF

Download PowerPoint File



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Predict radio's uplift by
sector/objective



Predict Now

Predict radio's uplift
alongside other media



Predict Now

Listen to the best
performing radio ads



Listen Now



1.Sector

2.Objective

3.Audience

4.Measure

- All Campaigns
- Broadband
- Business
- Business Banking
- Charities
- Confectionery
- Cosmetics
- Distress
- Drinks - Alcoholic
- Drinks - All
- Drinks - Soft
- Electronic
- Energy
- Entertainment (in home)
- Finance - All
- Finance - Banks
- Finance - Insurance
- FMCG - All
- FMCG - Food or Snacks
- Government or Public Service
- Healthcare
- Homes
- Media
- Mobile
- Motors

Your Selections:

Step 1: Sector

To predict the uplift effect of radio by sector and objective please select the relevant sector for your brand.



1.Sector

2.Objective

3.Audience

4.Measure

- All Campaigns
- Broadband
- Business
- Business Banking
- Charities
- Confectionery
- Cosmetics
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- Media
- Mobile
- Motors

Your Selections:

Step 1: Sector

To predict the uplift effect of radio by sector and objective please select the relevant sector for your brand.



1.Sector

2.Objective

3.Audience

4.Measure

All Campaigns

Announcement or Information

Brand Building

Your Selections:

Step 3: Audience

Please select what audience you want to explore.



1.Sector

2.Objective

3.Audience

4.Measure

All

Men

Women

16-24s

25-34s

35-44s

45-54s

Step 3: Audience

Please select what audience you want to explore.



1.Sector

2.Objective

3.Audience

4.Measure

7m

Men

Women

16-24s

25-34s

35-44s

45-54s

Step 3: Audience

Please select what audience you want to explore.



1.Sector

2.Objective

3.Audience

4.Measure

Ad Awareness
Brand Consideration
Brand Relevance
Trust



Your Selections:

Step 4: Measure

Please select the effectiveness measure relevant for your campaign.



1.Sector

2.Objective

3.Audience

4.Measure

Ad Awareness

Brand Consideration

Brand Relevance

Trust

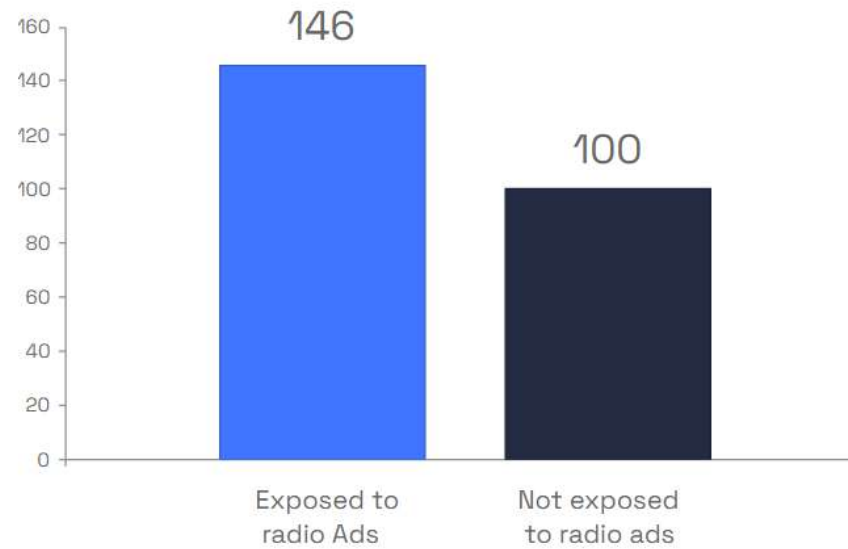
Your Selections:

1. Finance - Banks

Ad Awareness: Banks - Branding

Radio increases ad awareness by 46% for brand led Banking campaigns

Average uplift in ad awareness, exposed to radio ads vs. not exposed to radio ads



Base: 25 brand led Banking campaigns; average radio spend £406k

Source: Radiogauge from the Radiocentre

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Download PowerPoint file



1.Sector 2.Objective 3.Audience 4.Measure

Ad Awareness

Brand Consideration

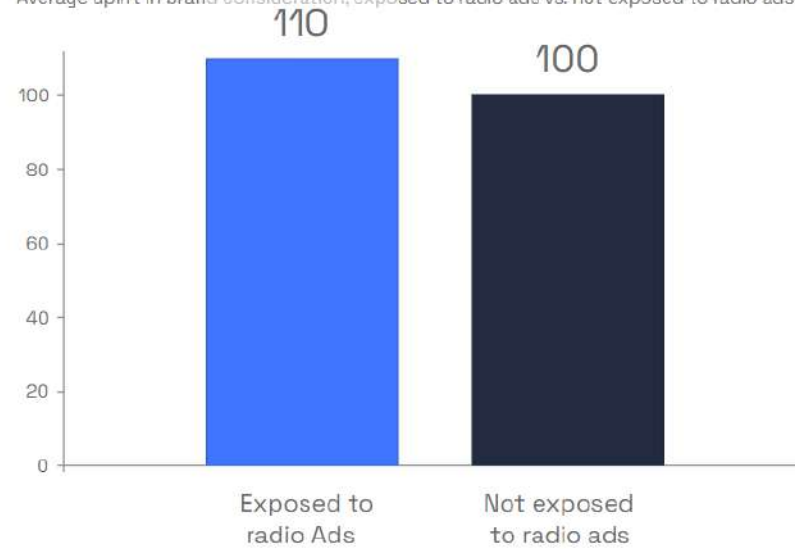
Brand Relevance

Trust

Brand Consideration: Banks - Branding

Radio increases brand consideration by 10% for brand led Banking campaigns

Average uplift in brand consideration, exposed to radio ads vs. not exposed to radio ads



Base: 25 brand led Banking campaigns; average radio spend £406k

Source: Radiogauge from the Radiocentre (strongly agree scores)

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1.Sector

2.Objective

3.Audience

4.Measure

Ad Awareness

Brand Consideration

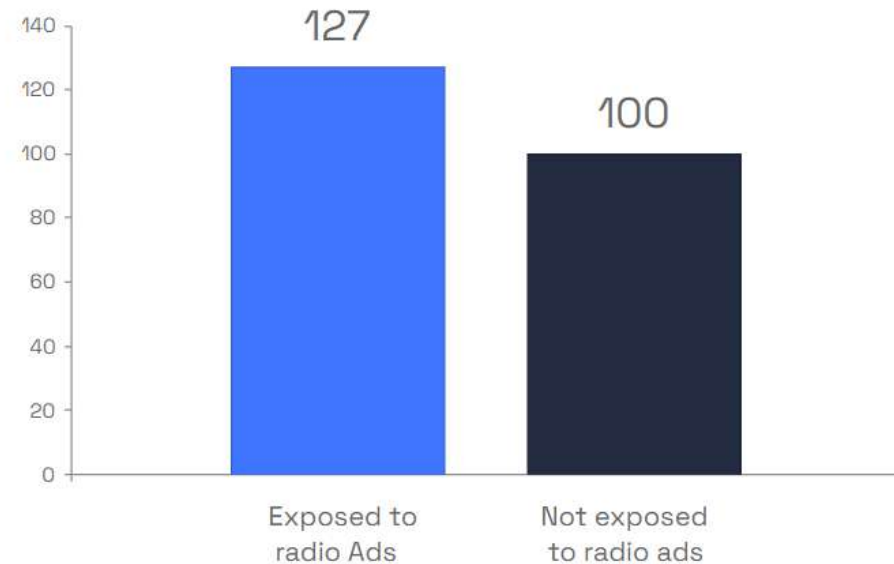
Brand Relevance

Trust

Brand Relevance: Banks - Branding

Radio increases brand relevance by 27% for brand led Banking campaigns

Average uplift in "this brand is for people like me" score, exposed to radio ads vs. not exposed to radio ads



Base: 25 brand led Banking campaigns; average radio spend £406k

Source: Radiogauge from the Radiocentre (strongly agree scores)

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1.Sector 2.Objective 3.Audience 4.Measure

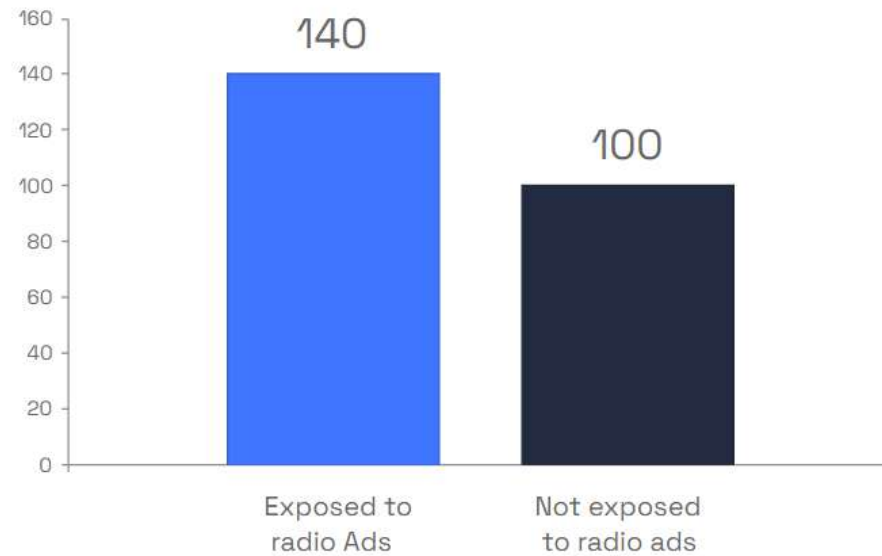
- Ad Awareness
- Brand Consideration
- Brand Relevance
- Trust**

Your Selections:

Trust: Banks - Branding

Radio increases Trust by 40% for brand led Banking campaigns

Average uplift in Trust, exposed to radio ads vs. not exposed to radio ads



Base: 9 brand led Banking campaigns; average radio spend £434k


Source: Radiogauge from the Radiocentre (strongly agree scores)

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New Insight into audio creative effectiveness

 radiocentre



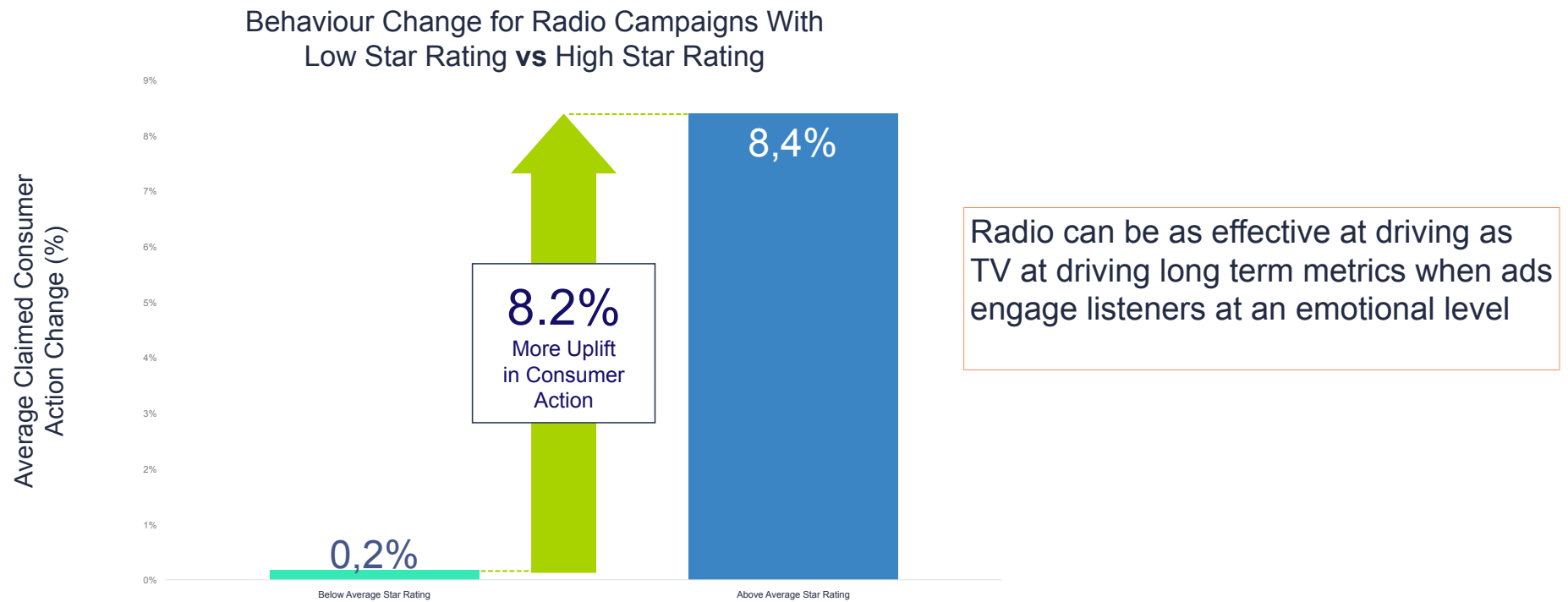
Listen Up!

Emotion's Defining Role in Radio Advertising Effectiveness

 radiocentre **System 1**

92

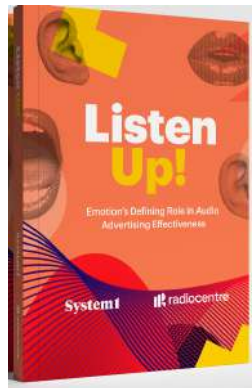
Radio ads with positive emotions dramatically change behaviour



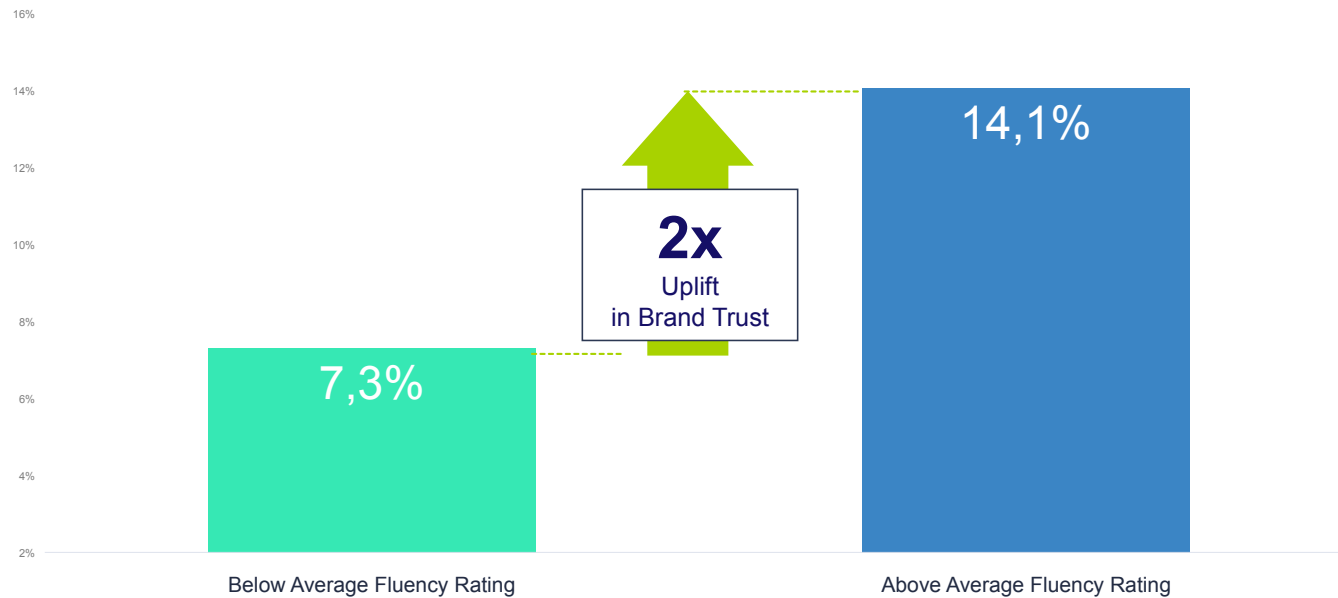
Source: System1 and Radiocentre, 55 radiogauge campaigns & 50,000+ UK respondents. Weighted with total campaign media weight (GRPs). Behaviour includes at least new purchase, use, search, WOM, share on social or store or website visit.

Strong branding doubles brand trust effects

Brand Trust Uplift For Radio Campaigns With Low Brand fluency vs high brand fluency

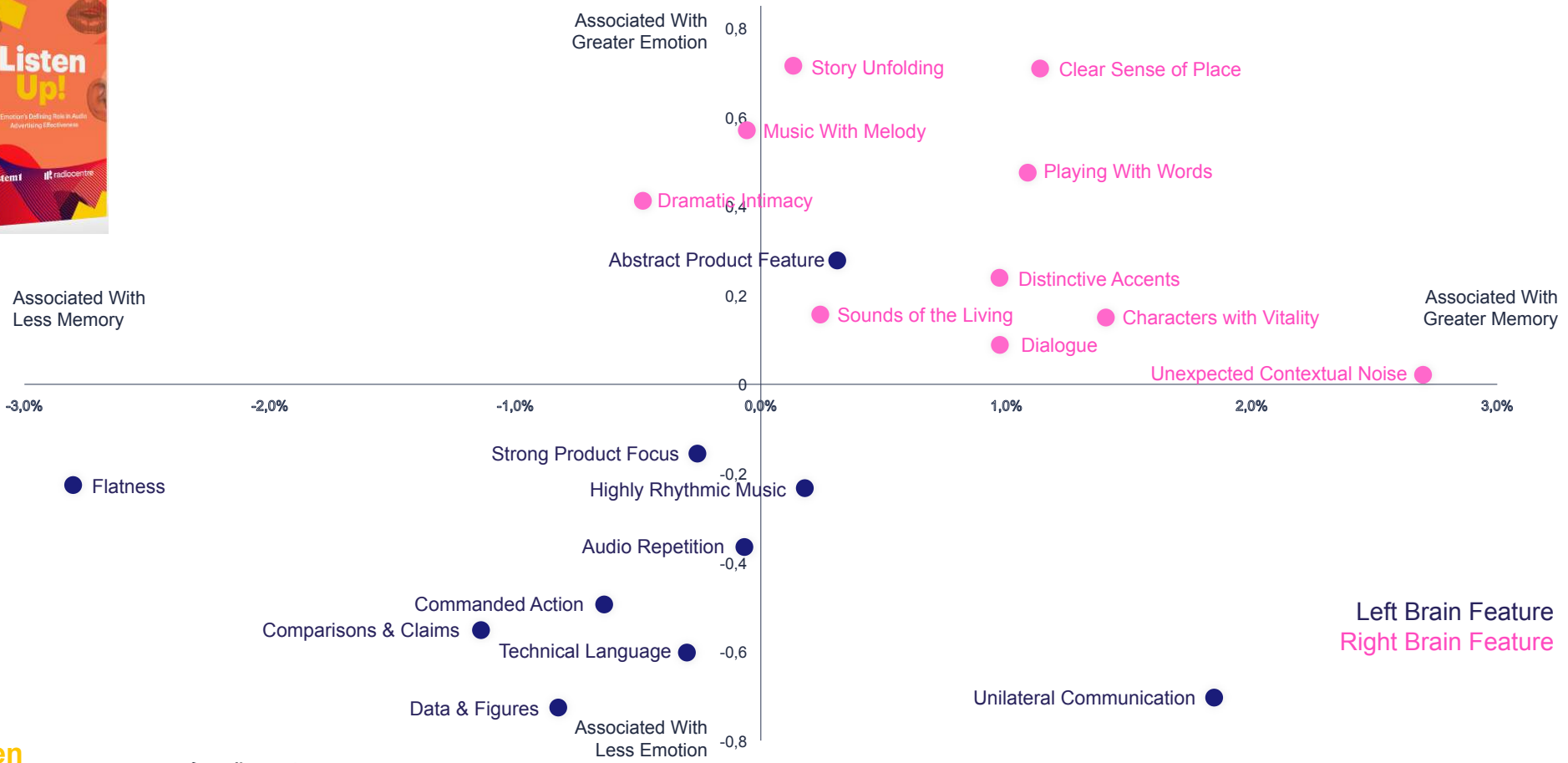
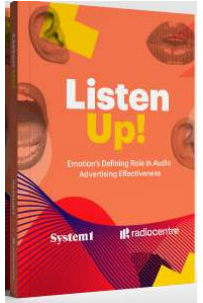


% Increase in Brand Trust (Top 5 Box)



Source: System1 and Radiocentre, 55 campaigns & 50,000+ UK respondents. Weighted with total media weight (GRPs)

Right-brain audio creative features are more associated with memory and emotion



Source: System1 & Radiocentre 55 campaigns. Weighted with total campaign media weight (per 100 GRPs). Average uplift if feature is present.

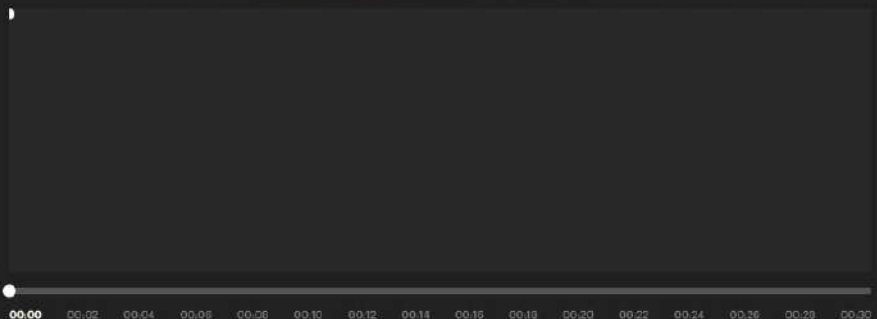


FaceTrace Emotional Response [?]

- Contempt
- Disgust
- Anger
- Fear
- Sadness
- Neutral
- Happiness
- Surprise



FluencyTrace Brand Recognition [?]



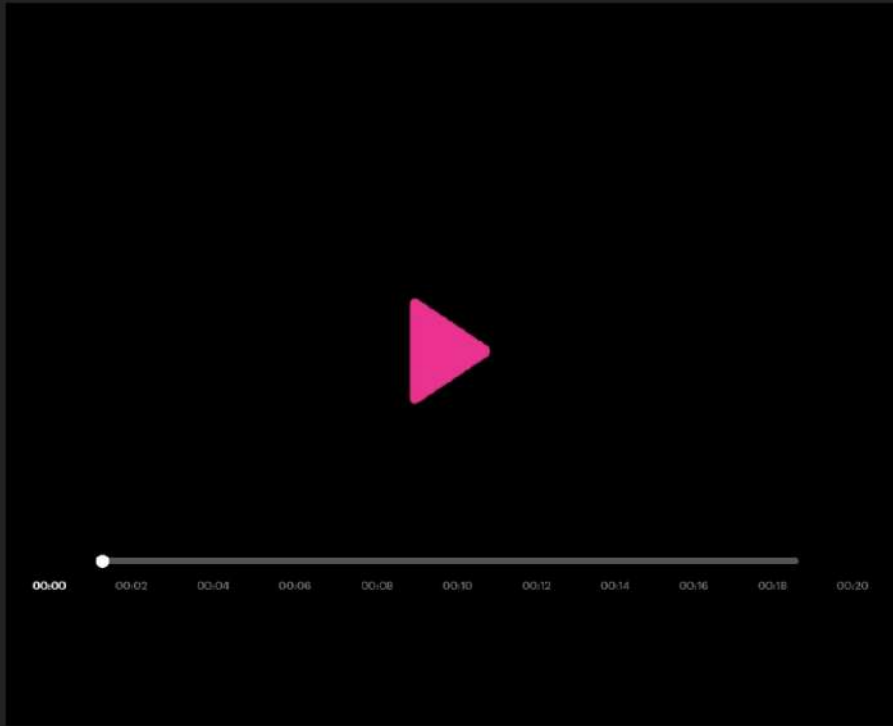


NatRep Custom Sample
Not available

Second-by-second Response



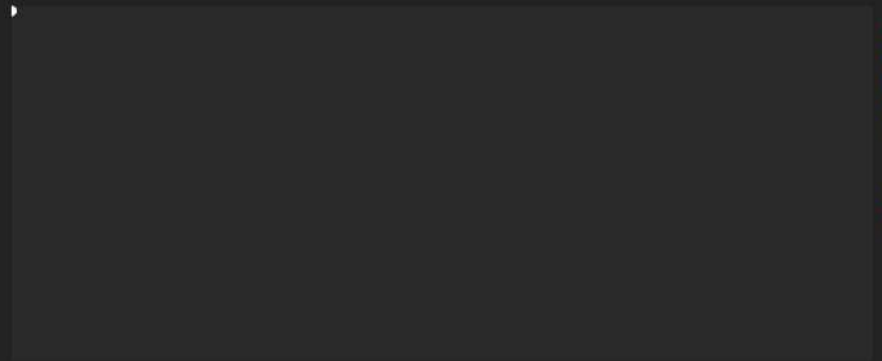
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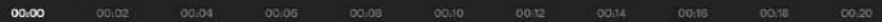
AUDIO

Sound of Magnum (Cracking) (Labs Radio - Low data)
Magnum (Ice Cream)

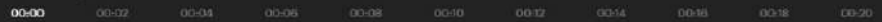
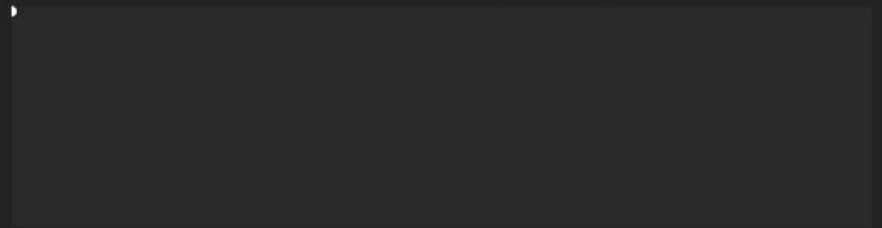
FaceTrace Emotional Response ?



- Contempt
- Disgust
- Anger
- Fear
- Sadness
- Neutral
- Happiness
- Surprise



FluencyTrace Brand Recognition ?



Best Practice Audio Creativity

Best Practice Audio Creativity



Incorporate more right brain creative features



Create with the listener in mind



Don't Zig, Zag Zag Zag!

Best Practice Audio Creativity



Embrace The Power of Music



Be Consistent & Leverage a Recognisable Strapline



Brand Early & Often to Benefit From Trust Effects

Thank you

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