

Podcast advertising market: Status Quo in Germany

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1. Introduction **2**

2. Explanation and use of podcasts **2**

2.1 Definition of podcast 2

2.2 Podcast landscape in Germany 2

2.3 Podcast usage in Germany 3

3. Advertising in podcasts: technology and guidelines **5**

3.1 Established advertising formats (audio ads) 5

3.2 Placements in podcasts 5

3.3 Other advertising solutions in the podcast environment 6

3.4. Advertising in podcasts: technology 6

3.5 Targeting 7

3.6 Advertising rules 7

3.7 Brand safety 8

4. Campaign booking **8**

4.1. Role of podcasts in the media mix 8

4.2 Selection of offers/environments 8

4.3 Selecting the form of advertising 9

4.4 Purchasing and implementation 9

5. Proof of performance and advertising impact **10**

5.1. Podcast campaign reporting 10

5.2. Tracking podcast campaigns 10

5.2.1 Tracking with promo codes 10

5.2.2 Tracking with clickable elements 11

5.2.3 Tracking with an external tracking pixel 11

5.3 Advertising impact of podcast campaigns 11

5.3.1 Acceptance of podcast advertising 11

5.3.2 Upper funnel / brand resonance / branding 12

5.3.3 Lower funnel / activation / performance and purchasing behavior 13

6. Conclusion **13**

List of sources **14**

List of authors **16**

About us 17

Imprint 17

1 Introduction

Interest in the podcast medium has continued to grow significantly in recent years. For many advertisers, podcast advertising has become an indispensable part of their media mix; others are still at the beginning of evaluating its potential use as an advertising medium. According to OVK market figures, the podcast advertising market in Germany grew by around 13% from 2022 to 2023; further growth of just under 14% is expected for 2024. The growth momentum of the podcast advertising market is above that of the online audio market as a whole (forecast of 10% growth in 2023 and 12% growth in 2024). Internationally, the strong growth trend continues unabated. According to IAB US, for the first time in 2024 more than 2 billion US dollars in revenue from podcast advertising is expected. By 2026, this is expected to rise to almost 2.6 billion US dollars. In the UK, podcast advertising was the fastest-growing segment of digital media in 2023 with growth of 23%, ahead of connected TV (21%) and social video (20%).

The aim of this white paper is to provide both experienced podcast marketers and podcast "newbies" with guidelines, orientation, and a holistic insight into the growth market of podcast advertising. To this end, Chapter 2 begins with a structure, players, and usage, before Chapter 3 provides a detailed breakdown of the standards, technology, and guidelines for podcast advertising. Chapter 4 outlines an example of the procedure for planning a podcast campaign, from selecting the right environments through to purchasing and implementation. Section 5 deals with the proof of performance and the correct use of podcasts in the marketing funnel. The focus of the paper is exclusively on the German market.

2. Explanation and use of podcasts

2.1 Definition of podcast

Podcasts are "audio and video contributions that can be obtained via the Internet," as Prof. Dr. Daniel Markgraf aptly puts it. The term podcast is derived from the English phrase "play on demand" (pod) and the abbreviation of the word "broadcast" (cast). In most cases, a podcast consists of a series of media contributions that are offered for download on the Internet and can be played using an app (a so-called „podcatcher") and various feed formats (usually RSS feeds). Podcasts that are offered as video files are called „vodcasts". However, this paper focuses on audio offerings.

2.2 Podcast status quo in Germany

The number of podcast formats available in Germany is estimated to be between 50,000 and 70,000. Of these, around 200 formats are currently listed in the "ma Podcast" reach survey, agma's log file-based measurement of podcast views ("valid downloads"). The most popular genres in Germany include comedy, true crime, and society & culture (comprising both socially relevant documentaries and talk formats). The best-known publishers in Germany include established media companies such as Seven.One Audio (ProSieben Sat 1), Springer Audio (Axel Springer), RTL+ (RTL Deutschland), ZDF, Zeit Online, Spiegel, Handelsblatt, FAZ, Süddeutsche, ARD, and Deutschlandradio.

Sources Introduction:
- BVDW, OVK forecast, 2024
- IAB, U.S. Podcast Advertising Revenue Study, 2024
- IAB, UK Digital Ad Spend 2023, 2024

Sources 2.1 Definition of podcast:
- Gabler Business Dictionary, Definition of Podcast, 2024
- Duden, Origin and meaning of podcast, 2024

In addition, there are numerous independent publishers and production studios such as Detektor FM (e.g., "Teuer Wohnen"), Pool Artists (e.g., ZEIT formats), and Bose Park (e.g., "Dark Matters"). Podcast platforms such as Spotify, Amazon Music, Audible, Wondery, and Podimo, which create (semi-)exclusive content, also act as publishers in Germany.

The BVDW Market Landscape Podcast provides a comprehensive insight.



2.3 Podcast usage in Germany

According to the Online Audio Monitor (OAM) 2024, the use of podcasts continued to rise and now encompasses one-third of the German population aged 14 and over, amounting to 25 million podcast users.

In the OAM survey, 31% of male online audio users who listened to podcasts at least once a month said they listened to podcasts, compared to 27% of women. Podcasts are popular across all age groups, though the majority of listeners are comparatively young, namely between the ages of 14 and 29. Almost half of podcast listeners (49.6%) belong to this age group.

A positive trend can be observed among 30 to 49-year-old podcast listeners, who make up 37.2% of those surveyed — an increase of 3 percentage points compared to 2023. The three strongest motives for podcast use are learning background information, getting tips and advice, and discovering new things. For younger listeners, podcasts also provide emotional and social benefits, such as offering a sense of companionship (56%), reducing feelings of loneliness (46%), and enabling them to have a say (44%). Among regular podcast listeners, 43% are individuals with a high level of education — a rise of 6 percentage points compared to the previous year. This educational level is reflected in the preferred podcast topics reported in OAM 2023: "Politics & Society" tops the list with 41%, followed by "Science & Technology" at 34%. "Leisure & Hobbies" and "Health" share third place with 32% each.

Sources 2.2 Podcast status quo in Germany:
- Podius, Own Data, 2024
- AGMA, maPodcast, 2024
- BLM, BVDW et al., Online Audio Monitor

This dominance of political and social topics is not surprising. For nearly 40% of regular listeners, podcasts play an important role as a source of information, while 41% use them as an additional information medium.

According to OAM 2023, there are age-specific preferences for content: comedy is particularly popular among the 14–29 age group, whereas the over-50s primarily listen to information programs, knowledge and educational content, and news. The 30–49 age group falls between the younger and older groups regarding their content preferences.

Frequency and Place of Use
Just under 20% of users listen to podcasts at least once a week. However, there are significant differences across age groups. Among 14–19-year-olds, 34% listen to podcasts weekly, with 15% even doing so daily or almost daily. For 30–49-year-olds, weekly usage is slightly lower but still significantly above the average, at nearly 27%.

According to OAM 2023, about one-third of respondents spend more than three hours a week listening to podcasts.

Among regular online audio users, 60% listen to podcasts while doing housework, while 32% focus exclusively on listening. When on the move, podcasts are listened to by 61% of regular users in the car, 28% on buses and trains, and 25% while doing sports.

Platforms
In terms of platforms for listening to podcasts, Spotify is the market leader among German users with 53%, according to OAM 2024. In the 14–49 age group, this share rises to 74%. YouTube ranks second with 41%, both overall and within individual age groups, while it takes first place among the over-50s. Amazon Music is used by 21% of respondents, and Apple Podcasts was mentioned by 14%. The remaining usage is distributed across other platforms such as RTL+.

Sources 2.3 Podcast usage in Germany:
- BLM, BVDW et al., Online Audio Monitor, 2023
- BLM, BVDW et al., Online Audio Monitor, 2024

3. Advertising in podcasts: technology and guidelines

3.1 Established advertising formats (audio ads)

The following advertising formats have become established in the podcast medium in recent years and can be booked regardless of the type of integration and delivery in most formats (with connection to advertising marketing):

Host-Read / Co-Host-Read: The podcast hosts and/or co-hosts present products or services personally within one or more podcast episodes. Here length usually varies from 30 to 240 seconds.

Presenter read (third-party speakers): In the presenter read, (third-party) speakers, such as a member of the production team or speakers bought in for the relevant format, present a product or service. The length is usually 30 to 120 seconds. A third-party speaker can also be an AI voice that receives the corresponding prompts as a briefing.

Sponsorship: In a sponsorship, either hosts, co-hosts or third-party speakers name the sponsor of the episode (approx. 7-10 seconds long for openers and closers). A pre-produced sponsorship generally includes the naming of the advertiser and their claim. The sponsorship reference is placed at the beginning and possibly also at the end of the respective podcast.

Podcast spot / dynamic podcast spot: The podcast spot is an advertisement produced specifically for the podcast environment. A dynamic podcast spot is an audio spot that adapts in real time to the content of the respective podcast and to the listener target group. For this purpose, individual elements (such as target group-specific content or content adapted to the environment of the spot) are pre-produced, compiled in real time via the ad server and played out dynamically.

Radio spot: A radio spot is a pre-produced spot that is also used by advertisers on the radio or via online audio. Radio spots can, for example, be automatically inserted at various positions in the podcast (usually post-roll) via dynamic ad insertion and can also be controlled programmatically

3.2 Placements in the podcast

All the advertising formats listed above can generally be used in the following positions:

Pre-Roll: Usually played before the start of an episode.

Mid-roll: Is played within the episode. Pauses in the content are usually used to place the advertisement. Depending on the length of the episode, several mid-roll placements may be available.

Post-roll: Is usually played after the end of podcast episodes.

Sources 3.1 Established advertising formats (audio ads):
- Landesmedienanstalten (State Media Authorities), 2024

3.3 Other advertising solutions in the podcast environment

In addition to the established advertising formats, the podcast environment offers many innovative solutions for different marketing objectives. Here are a few examples:

Branded segment: Three to five-minute brand features, for example in the form of an interview or segment sponsorship.

Branded episode: One or more special episodes that are published on the same feed as the regular episodes of the podcast – usually outside of the usual publication rhythm. This gives brands the opportunity to help shape the content.

3D Audio Ad: An ad produced using 3D audio technology. 3D Audio Ads can immerse listeners in an authentic listening environment, creating a dynamic and sensory virtual experience.

Sponsorship+: Extension for host read campaigns, where ads are read in by the respective hosts. These are then dynamically placed in other podcasts to reach the target group.

Roadblock: Exclusive fixed placement of an advertiser for one day in one or more podcasts of a or several podcasts of a marketer network.

Storytelling ad: Here, ads that build on each other within an episode are for listeners in such a way that an advertising story is told within the podcast.

Social media add-on: To extend the ongoing audio campaigns, posts or stories are published in parallel, for example, on the channels of the respective podcast and/or on the host channels.

3.4 Advertising in podcasts: Technology

The following three techniques can currently be used for the integration and delivery of advertising in podcasts:

Baked-in: With this form of advertising, the ad is permanently inserted into the podcast episodes without the use of an ad server and cannot be replaced without interfering with the content. Such ads are therefore firmly "baked into" the content. Baked-in ads therefore often remain in an episode even after the campaign has ended. Baked-in ads are usually presented by the podcast host themselves.

Dynamic Ad Insertion (DAI): With DAI, ads are provided via an ad server and automatically inserted into podcast episodes. The advantages are the possibility of dynamic advertising playout, targeting and programmatic buying. In contrast to baked-in ads, it is easy to capitalize on the catalog (i.e. the podcast episodes that are not current), as an ad can be inserted into all episodes via the ad server and the insertion is automatically stopped once the booked AIs have been reached. The resulting scalability of podcast advertising is a relevant factor for monetization. Not only presenter reads, podcast and radio spots can be played via DAI; host and co-host reads can also be used without any problems.

Programmatic playout: The term programmatic advertising describes the automated buying and selling of audio advertising spaces in real time. This channel usually comprises SSPs (sell-side platforms), DSPs (demand-side platforms) and an ad server. The inventory is made available via an SSP. The purchase takes place via DSPs. Programmatic advertising uses various price and auction models (1st price, 2nd price, fixed price) as well as trading types such as open auctions, private deals and guaranteed deals. Due to the cookie-free access, the data structure and alignment of the podcast streams differs significantly from other online channels. Identifiers such as listener IDs or MAIDs enable limited targeting strategies. Further information on programmatic advertising in audio

can be found in the separate white paper “Programmatic Audio & Data Management” (an introduction to the automation of audio advertising).

3.5 Targeting

Specific targeting options in podcasts are offered for both direct bookings (IO) and programmatic bookings – often by agencies with the appropriate technological connection. There are also targeting options for host reads. However, these are only recommended for host reads in very large podcasts or possibly as part of a bundling of several medium-sized podcasts. Otherwise, there is a risk that the desired campaign size cannot be served due to insufficient available reach. In general, the use of dedicated and combined targeting options is more recommended for high-reach inventories. In principle, listeners must opt-in for targeting that requires profiling, which can only be implemented across the board by the platform operators for podcasts.

Targeting options at a glance:

- **1st party data** (GEO, gender, age, device, interests, etc.)
- **Verticals** (showlists in various target group environments, e.g. sport)
- **Contextual targeting**

– Manual tagging by the editorial team

– Automated tagging via transcription and AI
  - via IAB categories
  - Free targeting via AI prompt / briefing

3.6 Advertising regulations

With increasing advertising spending and the associated extensive integration of advertising in podcast shows, the existing specifications and guidelines of the state media authorities should be observed as a framework for advertisers, marketers, podcasters and publishers.

In short: advertising must be easily recognizable as such and distinguishable from editorial content; surreptitious advertising and topic placements are not permitted; advertising of a political, ideological or religious nature is not permitted; the same rules apply to podcasts as to radio and television, i.e. the broadcasting rules.

In principle, it is advisable to follow the rules of the Advertising Council, which excludes the following advertising messages:

- Advertising that abuses consumer trust or exploits consumers‘ lack of experience or knowledge.
- Advertising that causes physical or psychological harm to children and young people.
- Advertising that encourages or tolerates any form of discrimination (origin, religion, gender, age, disability, sexual orientation) or reduces people to sexual objects.
- Advertising that encourages or condones violent, aggressive, antisocial behaviour or behaviour that endangers the safety of consumers, or that instrumentalizes misfortune and suffering.

Sources 3.6 Advertising regulations:
– Landesmedienanstalten (State Media Authorities), 2024
– Medienanstalt Berlin-Brandenburg (Berlin-Brandenburg Media Authority), 2024

3.7 Brand safety

The aim of the so-called IAB 2.2. certification is to reduce advertising fraud, maintain brand safety, improve the user experience and ensure compliance with GDPR legislation by integrating existing industry initiatives. Many providers in the market are already IAB 2.2 certified and thus enjoy the trust of the world's largest publishers. Measures to ensure brand security:

- Podcasters sign a disclaimer during onboarding to protect against malicious language, hate speech, etc.
- Every podcast is checked in advance (with the help of AI) and rejected in the event of hate speech
- Podcasts with swear words or explicit content are marked with "E" for "Explicit" -> various risk levels are created as part of white lists
- Freedom of expression is preserved within the framework of these guard rails

4. Campaign booking

4.1 Role of podcasts in the media mix

Podcasts play a special role within audio channels and offer particularly high-quality environments due to the intensive use and attention of listeners. They offer a trusting environment and usually a safe space in which brands can place their messages.

At the same time, the market is growing in its range of podcasts and the specialization of topics. Listeners are therefore very selective about which podcasts they want to listen to and when they listen to them.

The strengths of podcasts lie in building trust, branding and placing values and content through longer integrations. It is possible to convert contacts into activation using call-to-actions and voucher codes.

Podcasts are therefore a very good option in the media mix when it comes to a full-funnel approach. Podcasts are also an increasingly important component within the audio mix with placement exclusivity. Auditory contacts that have already been generated can be taken up again and, for example, deepened in peak environments.

4.2 Selection of offers/environments

The search for suitable podcast environments currently involves a lot of research for advertisers (clients & media agencies). Internationally active (audio) marketers such as Acast, Ad Alliance, IQ Digital, Julep, RMS, Podstars, Seven.One Audio, Spotify (Megaphone) or Zebralution Podcast (Zebra-Audio.net), which now represent a large part of the German-speaking podcast market and serve as initial reference points. The size of the respective marketing rosters ranges from a few hundred to several tens of thousands of podcast titles. Moreover, there are still a significant number of podcasters who manage and control their own marketing. The marketing of a podcast by several parties (first, second and third party marketing) is also widespread. Overall, we can therefore speak of a fragmented market.

Sources 3.7 Brand Safety:
- IAB Europe, Understanding the Transparency & Consent Framework v2.2, 2023

To counteract fragmentation, many marketers try to cover a variety of genres and target groups in addition to a large podcast portfolio. Traditionally, the podcast selection of many advertisers is very much driven by the environment and individual titles. While the selection of targeted podcasts continues to enjoy great relevance, scalable booking options (channel, run of network) – often in combination with technical targeting (e.g. GEO or contextual – see 3.5) – are becoming increasingly popular. The selection of the right offer depends largely on the communication objectives of the advertiser (see 4.1 "Role in the media mix"; e.g. upper, mid & lower funnel consideration).

In addition to the marketers' planning tools, platforms such as "Podius", which bundle relevant market data from various marketers and make it available to interested customers and agencies, also help with the selection of the right offers and environments. This makes it easier to plan, compare and create campaigns across marketers. However, "Podius" does not currently enable centralized booking across all podcasts/marketers.

4.3 Selection of the advertising form

Each form of advertising not only has different requirements and objectives in terms of creation, but also with regard to the end consumers (listeners). The ad forms explained in 3.1. are therefore not always possible for all inventories.

Host/co-host reads, for example, are particularly suitable for addressing the desired target group in a targeted manner and placing messages. Due to the very native and authentic integration, the attention is undivided and the relevance for the listeners is very strong. The sympathy and credibility of the host can thus be transferred to the advertiser or the message. The challenge with this form of advertising, however, is the usually high coordination effort. As a result, such native podcast integrations are usually difficult to scale.

Presenter reads or podcast spots take the spoken part of the host read to a more scalable level. Here, it is not the host who speaks directly, but a third-party speaker, for example. The advantages of podcast tonality and less disruptive integration than a classic commercial break lead to greater acceptance among listeners than radio spots, for example. Production is less costly, as a recording can be placed independently of the environment.

The aforementioned radio spots can be used just as widely. However, the ad sounds much more promotional and less native than host/co-host reads, presenter reads or podcast spots.

4.4 Purchasing and implementation

A podcast campaign can currently be purchased via three established booking channels in media planning. The most widespread are so-called (1) IO (insertion order) bookings. Here, the advertiser – usually in close coordination with the sales teams of the marketers or the podcasters – determines to what extent, at what price and for what period of time advertising is to be placed in the podcasts. IO bookings are closely linked to environment planning for both analog and digital media. As already described in 4.2, traditional environment planning continues to dominate the podcast advertising market. The focus here is on the booking of host or presenter read campaigns; however, all common advertising formats can be booked via IO.

With the increasing "mechanization" of the podcast market, (2) programmatic bookings (see 3.4) are also gaining relevance. Automated purchasing usually requires significantly less coordination and consultation than traditional IO bookings. The other – often data-based – advantages only come into play to a very limited extent in the podcast due to cookie-free access. For this reason, programmatic buying currently focuses primarily on the scalable use of radio spot campaigns (e.g. extension of classic radio or digital audio campaigns into podcasts) – via channel or network rotations.

Sources 4.2 Selection of offers/environments
– Podius, Own Data, 2024

Some market players also offer (3) self-service tools. These allow advertisers to plan their campaigns fully or partially automatically, produce ads, determine target groups and optimize them on an ongoing basis. The entry-level budget for such self-planned campaigns is often just a few hundred euros. In return, the advertiser forgoes professional consulting services. Currently, only a fraction of podcasts can be controlled via such tools, which means that mostly smaller campaigns (low budgets; small or medium-sized customers) are realized via self-service.

5. Proof of performance and advertising impact

5.1 Podcast campaign reporting

After the end of a podcast campaign, reporting is carried out, which can vary in the level of detail depending on the provider:

Metrics: Booked impressions of the campaign (campaign target), delivered impressions of the campaign (campaign result), unique impressions or unique users of the campaign (delivered impressions taking frequency into account).

Dimensions: Podcast name, type of ad & position, region, city, country, date, ClientApp, device OS, device type.

Proofs: Some marketers offer certified campaign reporting (e.g. with the globally recognized IAB certification, see section 3.7). This ensures, among other things, that the advertising media have actually been integrated into the valid downloads/streams.

5.2 Tracking podcast campaigns

5.2.1 Tracking with promo codes

Promo codes are alphanumeric codes or keywords that are used in advertising to offer consumers discounts, incentives or exclusive offers. They can also be used in podcast campaigns. They are usually unique to each podcast or campaign and are provided by advertisers to track the effectiveness of their advertising efforts.

When a listener hears the promo code in the podcast episode and decides to make a purchase, he or she enters this code during the checkout process. This activates the discount offer and the advertiser can assign the purchase to the podcast in which he or she advertised. Promo codes are sometimes combined with vanity URLs or offer landing pages to simplify the process for listeners.

5.2.2 Tracking with clickable elements

Link tracking is an analysis of general user behavior by automatically tracking and counting the clicked links in the description text of the podcast episode. “LinkTrees” are often used, which combine several links in one overview.

5.2.3 Tracking with an external tracking pixel

Audio pixels can help to track both dynamic ads and ads presented by the host. With the help of a tracking URL, actions can be tracked after listening. Tracking URLs usually require the appropriate macro information to ensure targeted tracking.

Sources 4.4 Purchasing and implementation:
- BVDW, Market Landscape Programmatic Audio, 2024
- Spotify, 2024

Extract of providers: Podscribe, Podtrac, Spotify Ad Analytics, Chartable, Podsights, ArtsAI, Adform, Adition, Google Doubleclick, Veritonic, Lucid, Magellan AI and others
Advantages: Audio pixels and website or app pixels make it possible to identify the device playing the material and the subsequent actions of the listener. This includes third-party impression tracking, verification, brand lift, attribution and other purposes.

Tracking with external tracking pixels is controversial under the GDPR (data protection) and is therefore only supported by a few market participants.

5.3 Advertising impact of podcast campaigns

5.3.1 Acceptance of podcast advertising

The acceptance of podcast advertising is high: According to the "Podstars Podcast Survey 2023", 85% of listeners can actively remember at least one brand they have heard. 92% accept podcast advertising so that podcasts can continue to be offered free of charge. Overall, podcast advertising enjoys 18% higher credibility among listeners compared to radio advertising. In studies conducted by national marketers and media companies, the majority of respondents also confirmed that they perceived the creations as extremely informative and credible.

In contrast to radio, podcasts are "lean forward" media. This means that listeners actively follow the podcast throughout its entire duration. In addition, users select the topics relevant to them in advance, which covers a very specific target group – according to the Online Audio Monitor 2024, podcasts play a very important role as a source of information on current affairs for almost 40% of regular listeners. As a result, the content is consumed and perceived particularly attentively and consciously. Listening to a podcast creates a particularly focused usage situation that encompasses all content, including the integrated ads from advertising partners. The results of the RTL study "Campaign Impact Podcast HolidayCheck" from 2023 show, for example, that 85% of respondents were generally aware of advertising, 45% remembered the ad for the customer HolidayCheck, with 35% giving positive feedback about the advertising.

Furthermore, the number of advertising minutes within podcasts is not yet at the level of other digital media. The limited and therefore manageable number of ads per episode, often placed as single ads, has a positive effect on acceptance because there are only a few and relatively short advertising interruptions.

As podcasts are a community medium, listeners trust the hosts in particular and transfer this trust from the host to the corresponding brand. This is also confirmed by Seven.One Audio's True Crime study from 2022, in which over 80% of respondents in the genre stated that the credibility of the podcasters was transferred to the advertised brands. The expertise that listeners attribute to their hosts was also transferred to the advertised brand, according to 70% of respondents. This relationship of trust forms the basis for the extraordinary advertising acceptance of podcast ads, as listeners trust that reputable and trustworthy products will be recommended to them. Host reads and a good brand fit further increase this acceptance. Compared to advertising integrations in traditional media, podcast advertising is perceived as more serious (+14%), more informative (+62%) and more eye-catching (+18%) – in a positive sense, as this form was rated as more entertaining at 71%.

Sources 5.3.1 Acceptance of podcast advertising:
- Podstars, Podcast survey, 2023
- Ad Alliance, One in four surfs the podcast wave, 2022
- Nielsen, Host read podcast advertising with high brand recall value, 2020
- BLM, BVDW et al., Online Audio Monitor, 2024
- Ad Alliance, Successfully staged! Podcast advertising for HolidayCheck with great key figures, 2023
- Seven One Audio, True-Crime-Studie, 2022

5.3.2 Upper funnel / brand funnel / branding

In recent years, podcasts have emerged from their niche to become an important medium that provides entertaining and informative content for a broad section of the population. The increasing popularity of the medium brings new opportunities for advertisers. There are opportunities for creating awareness and building a positive image for brands or products, particularly in the upper funnel.

Brand awareness, appeal and trust are key performance indicators in the upper funnel. These elements influence consumer decision-making and are therefore essential for brand success. The effectiveness of advertising campaigns in podcasts has been documented in various studies. This shows that podcast advertising specifically addresses and influences the above-mentioned aspects of the upper funnel..

Selected examples of the effectiveness of podcast advertising
The accompanying study by RTL Data and the Ad Alliance on the "G!VE ME LIVE" campaign underlines the effectiveness of podcast advertising (2020, n = 1,534): Due to its new foundation, the event platform G!VE ME LIVE was completely unknown prior to advertising. As a result of contact with the campaign, the brand already achieved an awareness of 19%, brand sympathy of 44% and an average brand image of just under 50%. In particular, the central messages of the communication, such as the diversity of the offer or the practical functions of the event platform, generated high approval ratings in the study. This makes it clear that podcast advertising is particularly effective for young brands without prior marketing activities.

The RTL Data/Ad Alliance study on Vodafone's podcast campaign, which advertises the Vodafone switching service, also provides insights into the advertising effectiveness of podcast campaigns (2021, n = 2,125): According to the study, 46% of all respondents remembered Vodafone's advertising in the podcast. Of these, 58% rated the campaign as informative and 55% as credible. For 65% of respondents, the communication showed that Vodafone understands the needs of its customers.

The study by zebra-audio.net in collaboration with m-science (part of Group M Germany), which examined an Opel campaign relating to the vehicle manufacturer's electrified models, provides additional evidence of the positive impact of cooperation in podcasts on brand perception, sympathy and image. As a result of the campaign contact, almost all of Opel's image dimensions surveyed improved. In particular, the attributes "is innovative", "lives the topic of sustainability" and "surprises me", which are particularly relevant to the campaign theme, recorded particularly high uplifts. The values for the aided and unaided perception of cooperation show that the communication was not only perceived, but also remembered in terms of content. In addition, respondents remembered Opel more than other established podcast advertising brands.

5.3.3 Lower funnel / activation / performance and purchasing behavior

In addition to the use of podcast advertising to increase brand awareness or appeal, the channel was used for sales virtually from the start of commercial use – also known as performance marketing. The main aim here is to bring listeners of a podcast to the (landing page of a) customer's website or app, where they can engage more intensively with the product, sign up for the newsletter or a test drive or order the product, depending on the offer.

The approach is understandable due to the attentive listening and the use of longer native advertising – and successful. For years, direct response clients such as Athletic Greens, KoRo, Babbel, Hello Fresh and Taxfix have been among the top advertisers in the podcast environment in Germany.

Sources 5.3.2 Upper funnel / brand funnel / branding:
- Ad Alliance, Favorite voice and concentrated attention – that works, 2020
- Ad Alliance, Advertising in Ad Alliance podcasts attracts attention and activates, 2021
- Zebralution, Study: Advertising impact of podcast campaigns, 2021

6. Conclusion

In summary, it can be said that podcasts are a dynamic and rapidly growing part of the media landscape in Germany. With a wide range of genres and a large number of available formats, they offer not only entertainment but also informative content on a wide range of topics. Particularly noteworthy is the high usage among young adults and the increasing interest of older generations, which indicates a broad acceptance and relevance of this medium.

In line with this, advertising in podcasts has become firmly established, supported by various ad formats and dynamic ad insertion, which can be specifically tailored to the listener and the broad acceptance of listeners.

Technological innovations and a growing understanding of the reach and effectiveness of podcast advertising are shaping a promising future for podcasts in Germany, with further growth in terms of both content and business. The development of new advertising solutions and technological possibilities such as 3D audio ads and contextual, AI-supported targeting underline the potential of this medium, which is increasingly being integrated into people's everyday lives. For millions of people in Germany, podcasts have become an indispensable source of information and entertainment and should therefore definitely be considered in today's media planning.

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Digital audio focus group

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