

SOUNDSPROFITABLE

May 2026 · London Podcast Show

ADVERTISING LANDSCAPE UK.

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SOUND INSIGHTS

"Advertising-resistant" was never the right label.

UNITED KINGDOM · SINCE 1922

BBC

A century of public service broadcasting. Quality audio without ads — funded by the licence fee, not interruption.

UNITED STATES · SINCE 1922

NBC · CBS · ABC · FOX · NPR

Commercial-funded networks from day one. Audiences grew up alongside ads — and the convention of paying with attention.

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A UK study, built like-for-like with the US.

ORIGIN · HOW THIS STUDY WAS BUILT

Three steps to a UK dataset.

2025

The methodology.

Tom Webster's Advertising Landscape US study set the framework – recall, trust, purchase, perception.

2026

The UK adaptation.

Ben Robins brought local expertise to a market the US data couldn't speak to.

5,033

UK adults · Feb 2026.

Weighted to the population. Like-for-like with the US data.

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Source: The Advertising Landscape UK · 2026, from Sounds Profitable · n=5,033 UK adults (weighted).

You cannot build a UK audio strategy
on US data. Today — for the first time —
you don't have to.



Q · UK ADULTS, MONTHLY PODCAST REACH

UK reach is bigger than you think – and the listening that's there is daily.

HEADLINE FINDING · UK

43%

of UK adults listen to ad-supported podcasts monthly.

56%

...of those listeners tune in **daily or almost daily**.

More than half. The audience is not just present – they are habitual.

US COMPARISON

31%

Monthly reach, ad-supported podcasting, US adults

PEAK DAILY BAND

61%

35–54 daily / near-daily

Source: The Advertising Landscape UK · 2026, from Sounds Profitable · n=5,033 (weighted).

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Among under-25s, podcasts already **outpace** broadcast TV.

Podcasts and TV trade places at 25-34. Beyond 35, TV reasserts — but the crossover already happened.

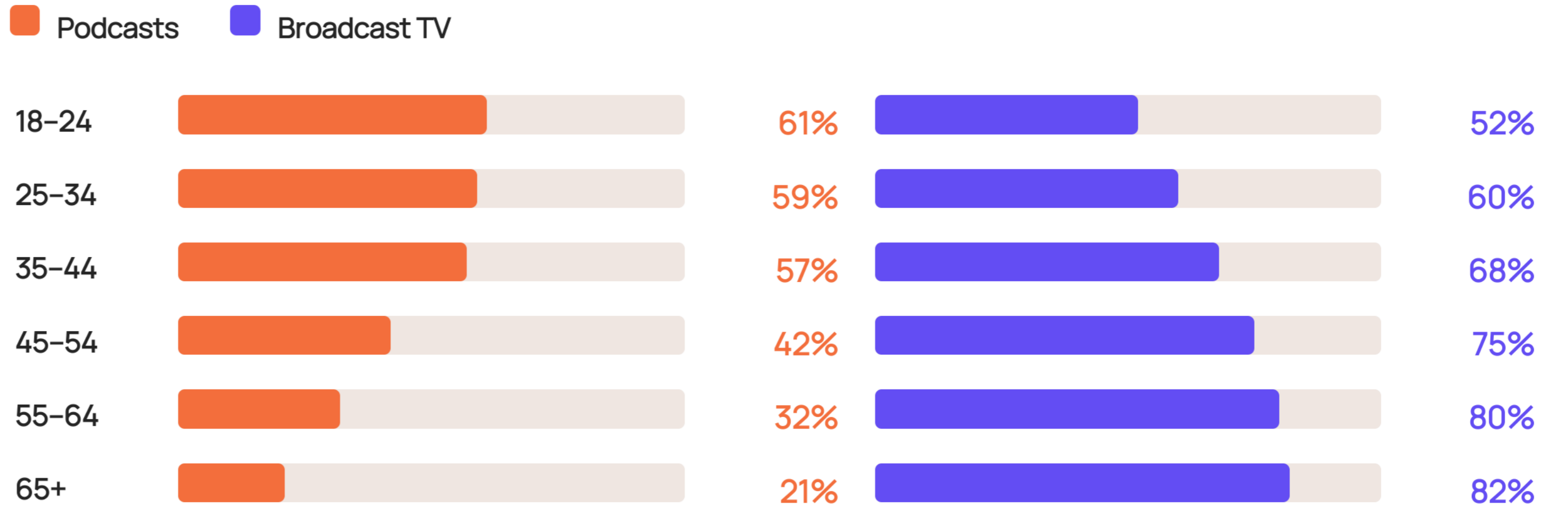
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MONTHLY REACH BY AGE BAND

Podcasts vs. Broadcast TV — UK adults



Source: The Advertising Landscape UK · 2026, from Sounds Profitable · n=5,033 (weighted). "Used in past month."

Q · PAST-WEEK AD RECALL

79% of UK podcast listeners recall a podcast ad in the past week.

The most advertising-resistant developed market in the world — and recall sits at four-fifths.

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HEADLINE FINDING · UK PODCAST LISTENERS

79%

recall hearing a podcast ad in the past week.

10TH OF 21 MEDIA MEASURED

Broadcast TV	94%
YouTube	88%
Radio	88%
Podcasts	79%

Source: The Advertising Landscape UK · 2026, from Sounds Profitable · n=561 podcast listeners. "Recall ad in past week."

Q · PAST-WEEK RECALL BY AGE

Recall doesn't crater with age — it sits above 80% through 54.

And the gender split is a tie. Podcast advertising in the UK isn't reaching one demographic — it's reaching adults.

GENDER PARITY

79%

MALE

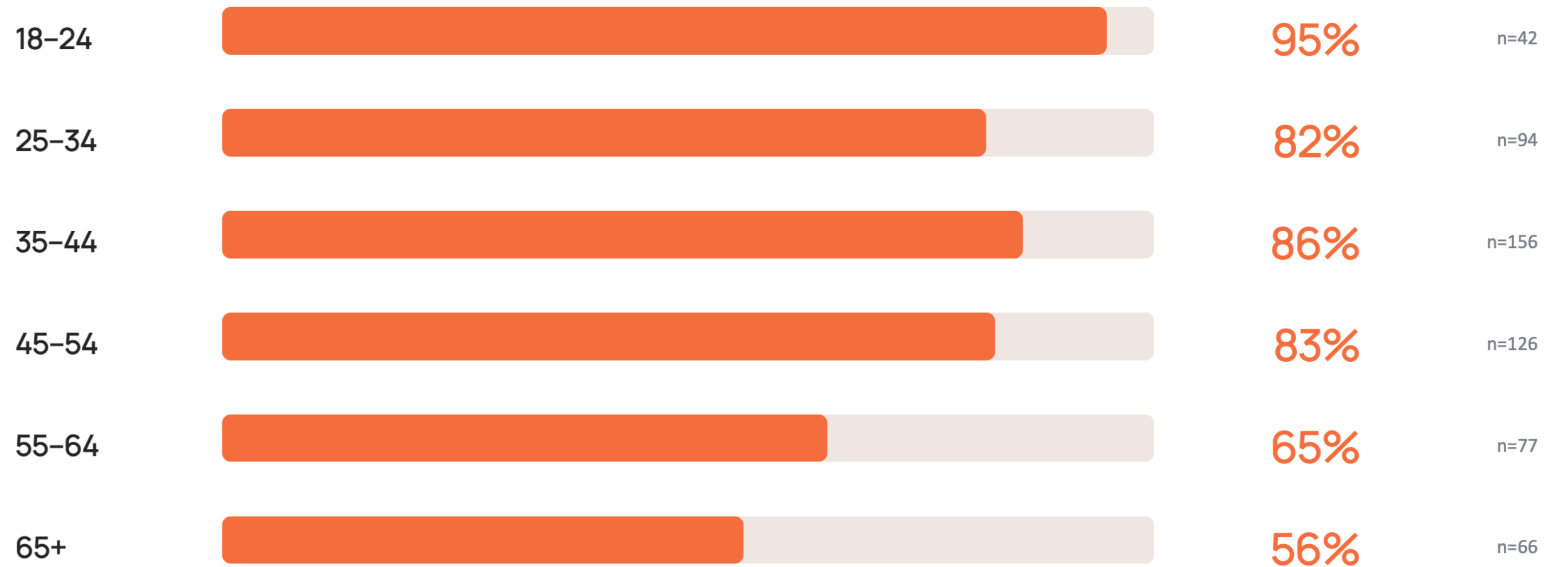
80%

FEMALE



PAST-WEEK AD RECALL BY AGE

Among UK podcast listeners



Source: The Advertising Landscape UK · 2026, from Sounds Profitable · n=561 podcast listeners.

Two studies. Same month. Same conclusion.

SOURCE 1 · EVAN SHAPIRO · MIPLONDON FEB 2026

Traditional TV is losing ~1/3 of its 4-screen audience in 36 months.

A multi-screen view of where attention is moving – at industry scale.

SOURCE 2 · SP × SOUND INSIGHTS · FEB 2026

5,033 UK adults proving the audio side of the same migration.

Reach, recall, behaviour. The audio half of the picture Shapiro sketched.

WHERE 18-24-YEAR-OLD UK ADULTS SPEND THEIR WEEK – % USING PAST MONTH

89%

Instagram

84%

YouTube

78%

TikTok

75%

Premium TV

61%

Podcasts

Q · BOUGHT AFTER HEARING AN AD

When listeners buy something they heard about, podcasts are the channel.

TOP OF LEGACY PACK

+10pts

vs. FM/DAB · +5 vs. YouTube · +2 vs. Broadcast TV.

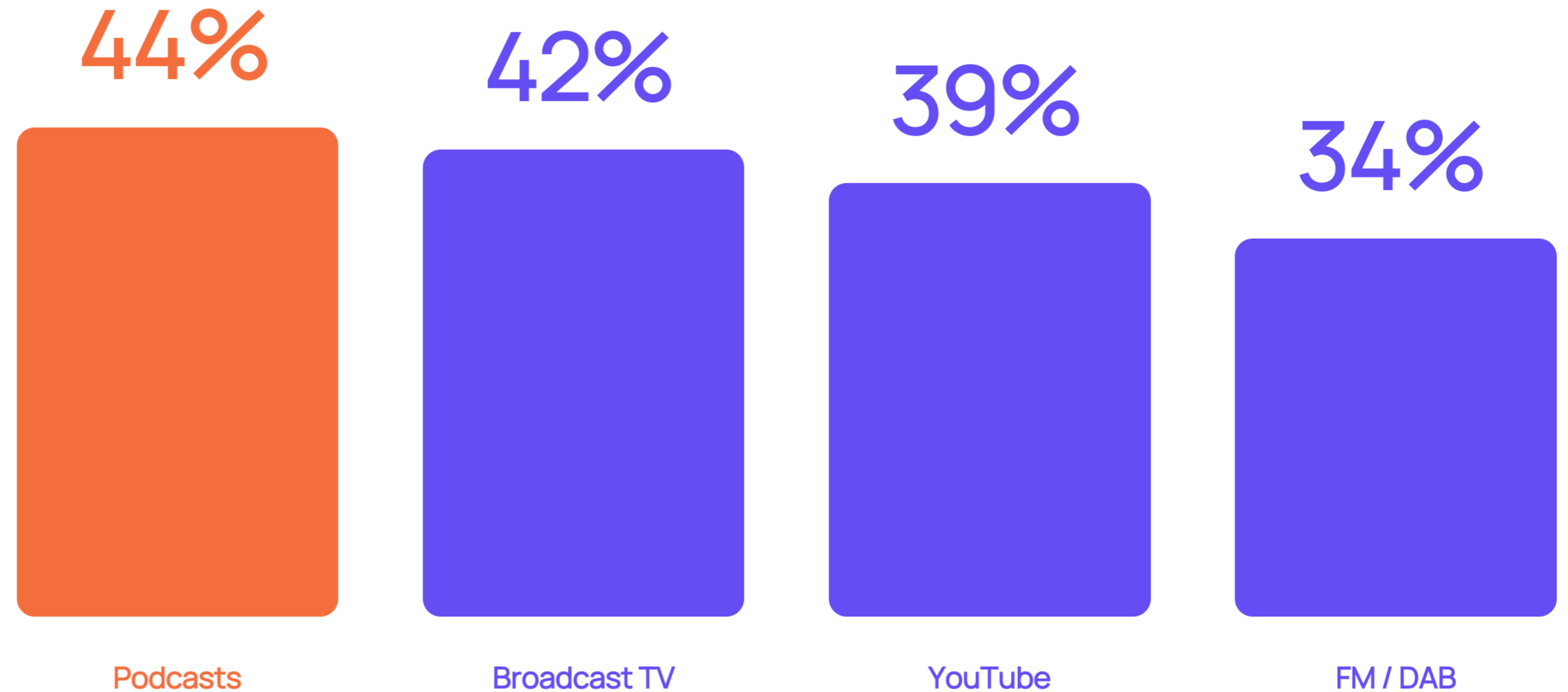
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PURCHASE RECALL · PAST 3 MONTHS

"I bought something after hearing an ad on..."



Source: The Advertising Landscape UK · 2026, from Sounds Profitable · n=561 podcast listeners. Multi-select.

Among legacy media, podcasts are the most trusted ad channel in the UK.

Where podcasts trail is on personalisation and relevance – territory where social platforms set a different bar.

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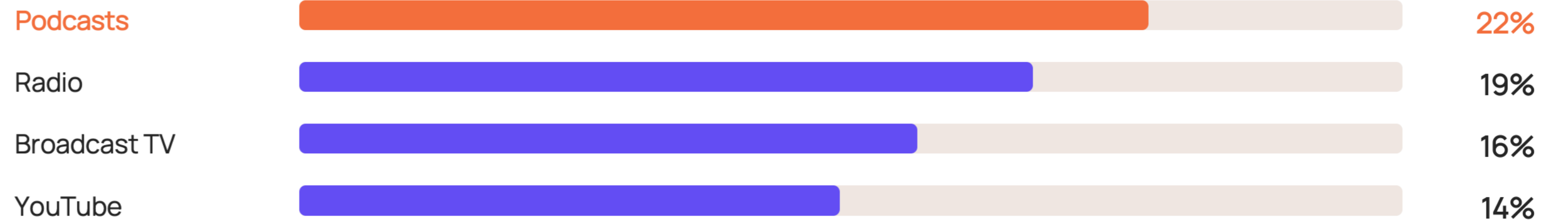


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TOP-2 BOX AGREEMENT · AD ATTRIBUTES

"Ads on this medium are..."

TRUST THE MESSENGER



AUTHENTIC & NATURAL



ACCURATE INFORMATION



Source: The Advertising Landscape UK · 2026, from Sounds Profitable · n=561 podcast listeners. Top-2 box on 5-pt scale.

Q · AFTER HEARING A PODCAST AD

Recall is one thing. Action is another.

40% of UK listeners take some action after a podcast ad – even small behaviours (writing a code, sharing) survive the ad break.

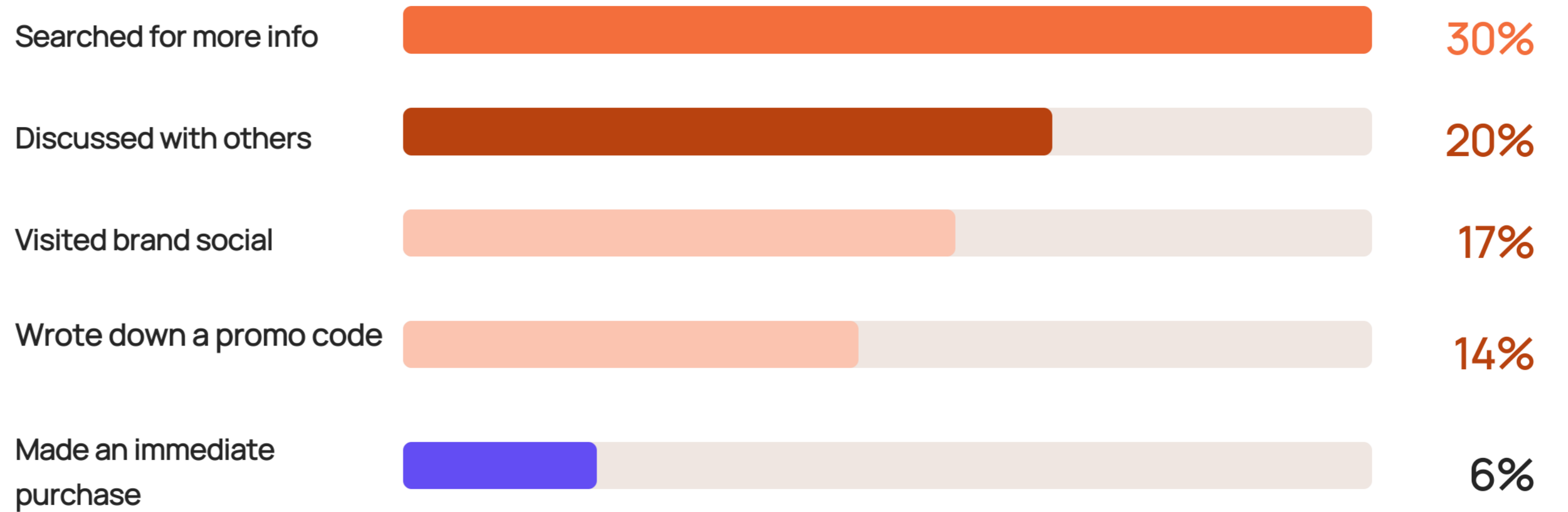
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ACTIONS TAKEN AFTER A PODCAST AD · PAST 3 MONTHS

Podcast consumers take **action**.



40%

of UK listeners take at least one action after a podcast ad. Intent that survives the ad break.

Source: The Advertising Landscape UK · 2026, from Sounds Profitable · n=561 podcast listeners. Multi-select; "Have done in past 3 months."

The compound case for podcast advertising in the UK.

REACH

43%

UK adults listen monthly

RECALL

79%

past-week ad recall

GENDER PARITY

79 / 80%

male / female recall – within margin

INCOME · £60K+

2x

27% listeners vs 14% non-listeners

INCOME · £80K+

2.5x

14% listeners vs 5% non-listeners

INCOME · £120K+

~3x

4% listeners vs 1% non-listeners

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If 43% of UK adults listen to podcasts monthly, and 79% recall a podcast ad in the last week — **why does the medium attract less than 5% of audio ad spend?**

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UK podcast advertising sits at a trust paradox.

Listeners trust the channel and the people on it. The buyer ecosystem hasn't yet metabolised that fact.

TRUST THE MESSENGER

22%

UK podcast listeners — highest of any legacy medium for "trustworthy source."

AUTHENTIC & NATURAL

19%

Top-2-box on "feels natural to the content" — leading TV and digital.

SHARE OF UK AUDIO SPEND

< 5%

Of all UK audio advertising spend currently allocated to podcasts.

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35–54 is the audience advertisers ask for. Three genres are over-indexed and under-supplied.

GENRE · 1

Politics & Current Affairs

+38

35–54 INDEX

Highest 35–54 over-index in the study. Quiet, advertiser-safe — and underbought.

GENRE · 2

Business & Money

+29

35–54 INDEX

High income, decision-maker dense, commute fuel. Few competing brands.

GENRE · 3

News & Daily Briefings

+24

35–54 INDEX

Habitual. Replaces morning radio. 4 brands dominate today — room for many more.

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Early UK movers built share-of-voice positions you can't buy today.

A handful of brands invested when supply was loose. They now own the host-read mention and the recall.

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UNAIDED BRAND RECALL · UK PODCAST LISTENERS

"Which brands have you heard advertised on a podcast?"

Brand A · DTC mattress Entered 2022. 4-host portfolio.	38%
Brand B · Investment app Daily news + business sponsorships.	31%
Brand C · Pet food Single-host exclusivity, Top 50 Sport.	24%
Brand D · Meal kit Cross-genre always-on since 2023.	22%
Brand E · Insurer Politics + News partnerships.	17%
Brand F · Telco Q4 2025 first-time entrant.	12%

Source: The Advertising Landscape UK · 2026, from Sounds Profitable · n=561 podcast listeners. Brand names anonymised.

Q · UK VS US AD SPEND PER LISTENER-HOUR

Adjusted for audience size, the UK spends one-fifth what the US does.

5.2× headroom. Same audience quality. Same craft. The infrastructure is mostly already here.

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£ PER LISTENER-HOUR, PODCAST ADVERTISING · 2025

UK headroom against the US benchmark

UNITED STATES

£0.94

Mature programmatic, branded host networks, in-house teams, DAI on 90% of inventory.

UNITED KINGDOM

£0.18

5.2× headroom. Audience is here. Buying infrastructure mostly is too.

Source: The Advertising Landscape UK · 2026, from Sounds Profitable · modelling, IAB UK Digital Adspend, IAB US Podcast Ad Revenue Report, Edison/RAJAR weekly reach. Illustrative.

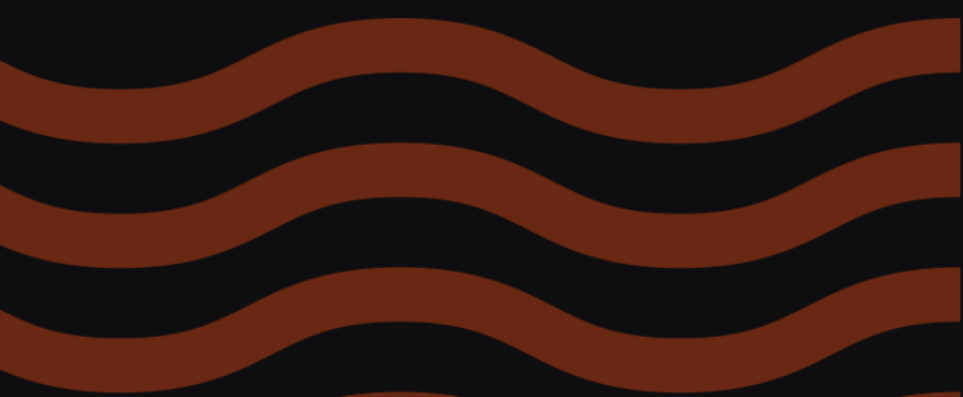
The US podcast market is a **blueprint**, not a ceiling.

The US took 8 years to grow podcast ad spend 7×. Programmatic, attribution, agency education, brand-side ownership — all built before the money showed up.

The UK has the audience, the trust, and the BBC-trained craft floor today. The infrastructure that took the US a decade to build is mostly already here. **The gap is decision speed, not capability.**

US BLUEPRINT · WHAT GOT BUILT

- '17 Programmatic stack matures
- '19 Attribution + brand lift standardised
- '21 Agency podcast desks specialise
- '23 Big brands take buying in-house
- '25 \$2.5B annual spend



Five conditions that make the next 18 months the moment.

01

Audience
At scale.

43% UK monthly. Crossover already happened under 25.

02

Recall
Proven.

79% past-week. 10th of 21 media.

03

Trust
Highest in legacy.

Top messenger trust. BBC-trained craft floor.

04

Competition
Still loose.

< 5% audio spend. Top genres: 3-5 brands.

05

Tooling
Already here.

Programmatic, attribution, DAI – production-grade.

All five rarely line up at once. They are now.

A market with audience, trust, infrastructure and loose competition is a market about to compress.

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The UK podcast audience already decided. The only question left is **who reaches them first.**



43%

UK MONTHLY REACH

79%

PAST-WEEK RECALL

+10pts

PURCHASE SIGNAL VS FM/DAB

5.2x

HEADROOM VS US SPEND

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UK podcast advertising isn't a question of **whether** it works. It's a question of **how soon you start.**

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THANK YOU, LONDON!

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