

THE SOUND-ON ERA



Advertising



ABOUT THIS REPORT

For 20 years, Spotify has been at the forefront of audio innovation, helping artists, creators, and authors share their voices and connect with fans around the world.

Today, we're witnessing a fundamental shift: audio is no longer a listening-only format—it's the connective tissue of modern media. As AI transforms how we communicate, audio is reclaiming its place as humanity's most natural interface.

We created this report—backed by 5k consumer survey responses, 105 advertiser survey responses, and 30 expert interviews—to share what we're hearing, seeing, and learning as we build the future of audio alongside millions of creators, 751M+ fans, and the brands that reach them.



INTRODUCTION

Press play to listen to this report



For most of human history, voice was how culture moved. Before we typed, we spoke. Before we scrolled, we listened. Stories traveled by voice. Trust was built through tone. Communities formed around shared sound.

Then the screen era took over. We optimised for clicks, feeds, and frictionless visuals. We got faster and more measurable, but also more fragmented. Attention splintered. Multitasking became the default. Engagement became something to capture rather than something to earn.

Now, another shift is happening. Not because we are rejecting technology, but because it's finally evolved. Streaming, AI, and connected devices have restored something fundamental: voice as a primary interface. We've entered the sound-on era.

Audio has become **the connective thread of modern media that turns passive consumption into emotional engagement and action.** And it's supercharged by technology capable of discovery, transaction, and connection at scale. As digital platforms drown in low-quality, doomscroll-inducing content (aka slop), audio has emerged as the last intentional space—where fans don't just listen, they participate, co-create, and transact.

Audio is where people are now choosing to spend their most intentional, engaged moments. This fundamental shift is a profound opportunity for advertisers, and the brands that move now will be the ones that earn attention when it matters most.



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CHAPTER 1

ALWAYS-ON ATTENTION

Why audio captures it when eyes alone can't

Audio today is not background media. As the connective layer running through daily life, it captures attention in moments when eyes alone simply can't: commuting, working out, cooking, walking, winding down.

Its ubiquity has allowed it to seamlessly integrate into nearly every environment and activity, capturing consumers' eyes *and* ears. And as lines blur between different formats, audio is showing its unique ability to connect, communicate, and entertain—not interrupt.



Global music streams hit **5.1 trillion** in 2025, a new single-year record, up **9.6%** from 2024.¹



As of January 2026, there are **7M+** podcasts available worldwide, and around **584 million** people across the globe have streamed podcasts.²



Globally, **billions** of voice messages are sent every day.³



The global audiobook market is projected to reach **\$35.5 billion** by 2032, up from **\$8.7 billion** in 2024.⁴



In February 2025, the Golden Globes awarded its inaugural Best Podcast award to ***Good Hang with Amy Poehler***, showing that podcasts, a medium rooted in audio, are now mainstream entertainment.

These are intentional spaces. People choose what they listen to. They choose when they press play. They choose what they pay attention to.

In a world defined by attention scarcity, that is structural, not incidental. As futurist **Mike Bechtel** puts it:

“The essential force shaping media [...] continues to be this attention-starved state. What this has done is created not only a scarcity of attention, but I think it’s also created a certain cognitive load.”

Audio reduces that load. It doesn't compete with life, it integrates into it. While screens distract, audio accompanies.



So why has audio captured so much attention?

It's positive and additive, a “no regrets” behavior

Consumers and advertisers agree that audio is a positive addition to their daily life, and they don't regret the time they spend with it, unlike other media. It creates deep emotional imprints by meeting consumers in their most intentional moments, taking off the cognitive load, and enhancing daily life and well-being.

94%

of consumers stop other online activity to stream audio instead.

70%

of advertisers agree audio captures focused attention more effectively than cluttered visual or social media platforms.

As the race for attention continues, audio rises to the top in a field overloaded with screen fatigue, doomscrolling, and draining rather than nourishing media. Tey Bannerman, an AI Strategy, Product, & Design Leader, says, “[Audio] is more immersive...You have an opportunity to ingrain it in someone's operating system more than something that just flies past [their] eyeballs.”

As advertisers desire deeper emotional bonds with consumers, audio is the vehicle for moving beyond traditional messaging and creating experiences that add value in people's lives.



“You listen to music because it lifts your speed, it lifts your spirits, it makes you happy... We want our brands to be part of that.”

AMY LANZI

CEO North America, Digitas



It's active and immersive

A common misconception in media is that audio is a passive format. But the data tells a different story: Audio drives more focused attention and higher recall than social media.⁵ It is the only medium that grants advertisers a continuous throughline to reach their audience.

The passivity myth is dead. Far from a peripheral backdrop, audio creates an immersive, intimate space where fans are actively engaged in ways visual formats cannot match. Audio moments consistently resonate more deeply and personally with fans and brands.

Multitasking has become the status quo with consumers—we second-screen while we watch TV, we scroll social during meetings. While most media prioritises sound off and allows for multitasking, audio is the only medium that delivers a consistent touchpoint for advertisers, allowing people to multitask without any competing media at all. Vitoria Bina Monteiro, Head of Media, Uber LATAM, explains, “When I'm driving, I'm driving and listening. When I'm at the gym, I'm doing my gymnastics plus listening. It's different.”

86%

of **Spotify users** silence videos on other platforms to listen to music, podcasts, or audiobooks instead.

2 in 3

advertisers agree that audio ads are more effective at reaching people when they are highly receptive vs. visual or social media platforms.

75%

of **consumers** report they typically remember the audio content they listen to (10% higher than social media content).

80%

of advertisers agree that audio ads benefit from higher audience attention and less distraction compared to other digital media ads.



It's a force multiplier

Audio stabilises fragmented attention by adding emotional continuity and “vibe” to every other format. As the future becomes multimodal, audio anchors the experience, elevating messaging to deliver its highest impact.

And when you add audio to other formats like video and display, it amplifies your entire media plan.

79%

of **consumers** agree that sound quality greatly enhances their video experience.

90%

of advertisers find multi-platform video/audio hybrids (ads that adapt based on screen focus) to be appealing.



“With audio, we usually get about a 4 to 8[x] ROI on incremental revenue.”

HILARY BATSEL

Vice President of Channel Strategy and Operations at LinkedIn, on the ROI her team sees in their MMM studies



CHAPTER 2

THE RISE OF ACTIVE AUDIO

How AI is fuelling audio innovation and creating new currencies

Consumer behavior has changed what audio is. And it's no longer your grandpa's radio.

On Spotify, it's switching back and forth between the audio and video versions of your favorite podcast, using the mixing tool to DJ your dinner party, starting a Jam session with your friends, dancing to your favorite artist's hits at a Billions Club Live concert, or streaming Spotify across devices and partner platforms.

Regardless of the experience or device, audio actively evokes emotion, captures attention, and consistently outperforms other digital media when it comes to creating a positive experience for consumers.

And now, as AI converges with audio, sound has shifted from one-way broadcast to two-way interface, becoming the communication medium of choice for the next billion users and the next frontier for innovation. Per Sandell, Co-Head of Spotify Advertising, points out, "AI is the best tool that [humans have] built. Every industry should start using it in its own unique and bespoke ways."

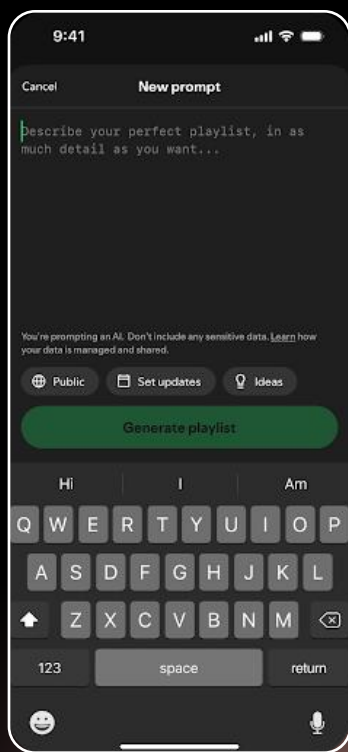


Spotify's Evolution

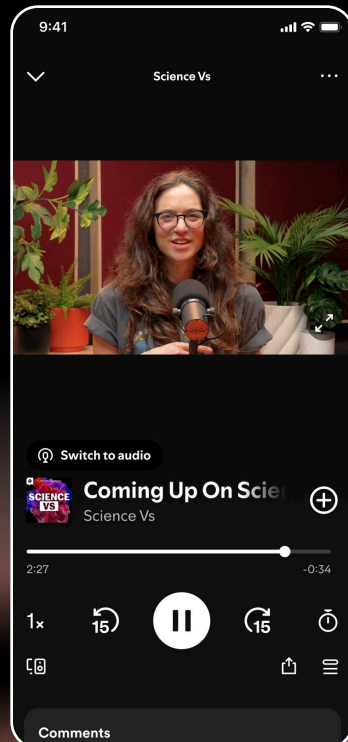
For the past 20 years, Spotify has been the leader in audio, helping creators find and share their voices with fans. In 2006, audio on Spotify simply meant streaming music. Now, it's evolved to visual albums, audio and video podcasts, audiobooks, music videos, live experiences, and AI-driven features like DJ, Prompted Playlist, and algorithmic playlists.

In an industry where most platforms are chasing eyeballs and churning out trends, we've been building something different at Spotify: a 751M+ fan ecosystem where listening extends to watching and participating, discovering evolves into interacting and connecting, and taste becomes cultural currency.

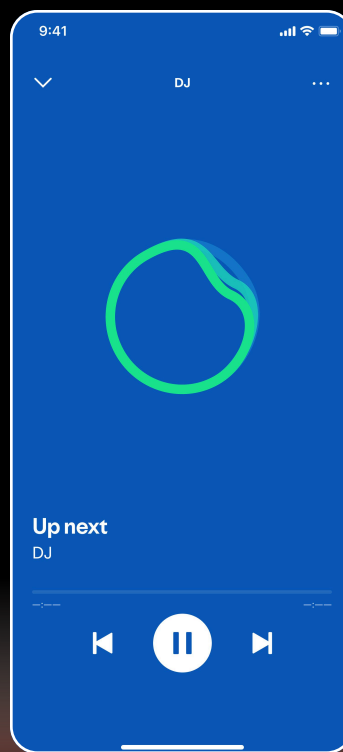
PROMPTED PLAYLISTS



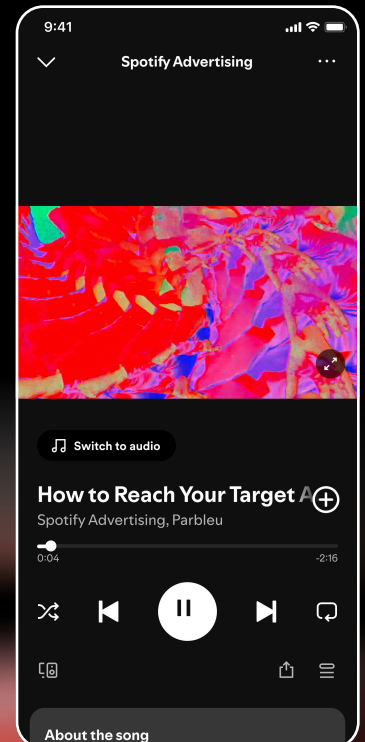
VIDEO PODCASTS



AIDJ



MUSIC VIDEOS





“[The goal for Spotify is to become] the world’s most intelligent, agentic media platform, one that you can literally talk to, that fully understands each individual listener and puts them in the driver’s seat.”

GUSTAV SÖDERSTRÖM

Co-CEO, Spotify



Here's how audio and AI are reshaping the future:

Voice becomes the new click

“Voice plus AI is going to enable a whole new world.”

— Dhananjay Yadav, Co-founder & CEO of Neosapien

Agentic AI is transforming everyday devices from passive tools into living touchpoints, enabling two-way dialogues where consumers can move from discovery to transaction in an instant. The numbers reflect this shift:

90%

of consumers say they want a verbal response from AI assistants.

70%

would use voice commands to engage with an ad they like—even when their screen is off.

Meanwhile, the global market for voice agents is projected to grow from \$2.4B in 2024 to \$47.5B by 2034.⁶

For brands, this means frictionless formats like audio are redefining what "active" media engagement looks like. One in two consumers finds voice-driven brand interaction (like saying "add to cart") appealing, and 85% of advertisers see interactive and conversational audio formats as the future of advertising.

You Speak It. DJ Brings It.

“[Spotify’s AI DJ is] the... best creative execution right now of AI and humanity.”

ELAV HORWITZ

Chief Innovation Officer, WPP

When Spotify’s DJ launched in February 2023, we harnessed the power of personalization and AI to give every fan their own personal DJ, making it one of the most-used AI products at the time. And now, DJ can take music requests, giving fans in more than 60 markets an entirely new way to curate the vibe of their streaming sessions in real time. Serving up suggestions using AI and insights from our global editorial experts, DJ helps people uncover new tracks, rediscover old favorites, and connect deeply with the music they love, simply by using their voice.

Since we launched DJ requests in May 2025, streams have surged 45% globally, and 42% of DJ users engaged with voice commands in Q4 2025.⁷



AI powers smarter personalization

AI is making audio smarter and more personal. Tomorrow's personalisation goes beyond knowing who your audience is. It's powered by emotional, attitudinal, and real-time contextual relevance that demands more attention. Over half of consumers find ads based on their topics of interest, like podcasts, audiobooks, and news, to be helpful. And brands see the potential: 87% of advertisers agree that dynamic audio ad personalisation based on listener mood, routine, or activity will increase campaign performance, and 82% of advertisers are eager for shoppable audio ads with voice interactions.

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Voice unlocks access for the next billion users

Voice is also the great equaliser. In high-growth markets like India and Brazil, where diverse dialects and multilingual populations may make text-based interfaces a barrier, voice removes the friction entirely.

Advertisers in emerging markets are 16% more likely than those in established markets to embrace interactive and conversational audio advertising, and consumers in LATAM are 23% more likely than their European counterparts to embrace voice-activated audio experiences.

“India has different dialects and different literacy rates... There might be people who are just not able to type it, but everyone is able to speak it.”

DHANANJAY YADAV

Co-founder & CEO of Neosapien, former Zalando

Read lyrics in your language

Lyrics are one of Spotify's most popular features, viewed hundreds of millions of times each day. Now, thanks to advanced technology, lyric translations are available worldwide, giving fans a richer way to experience the music and artists they love. This means more creators can connect with more fans around the world, and more fans can unlock the meaning of songs across different languages, all powered by audio and AI.



It makes the next generation audio-first by design

This shift isn't just geographic—it's generational. A new cohort of consumers is being shaped by screen-free hardware like Yoto and Toniebox and voice-first communication tools like AI chatbots and voice messaging. They're growing up with sound as their primary interface for learning, creativity, and connection.

As technology and media use shifts, parents and policymakers around the world are taking a closer look at the societal impact, benefits, and risks with different types of media access. This moment, which appears to be a retreat from media, is really a realignment toward formats with stronger controls, more trust, and greater peace of mind.

Audio is already ahead of it.

“Audio will grow in importance... It’s not that video’s had its day, but there’s more innovation and more excitement around audio.”

BEN DRURY

CEO & Co-founder, Yoto



The currencies for high-quality human experiences have changed

As AI floods the internet with synthetic sameness, two things become scarce: trust and taste. Audio holds an advantage here.

In addition to capturing attention, audio advertising gains trust. In daily moments, audio creates a personal space where brands can build lasting emotional connections. This intimacy, combined with Spotify's reputation for championing authentic creator voices and driving culture, creates a halo effect that can elevate every brand message.

As the advertising landscape becomes more fragmented and trust more scarce, audio—and the platforms that have earned genuine consumer loyalty—will become the essential partner for brands seeking meaningful impact.

Audio is the medium of consumer trust

Consumers are
36%

more likely to trust music or podcast ads compared to social media ads.⁸

80%

of advertisers agree that audio ads benefit from greater listener trust compared to advertising on other digital media.

70%

of advertisers agree that audio advertising consistently builds a stronger emotional connection with listeners, transferring positive sentiments from the audio content to the brand.

Spotify Wrapped

2025 Wrapped was more dynamic and personal than any of its predecessors, engaging 250M fans in its first 65 hours. The campaign focused on bringing fresh ways to revisit the sounds, voices, and moments that defined our fans' year, and it enabled them to share with the world around them. And audio, with the help of AI, uniquely enabled us to deliver this personalised experience to hundreds of millions of people.



“We wanted to use AI to innovate within the Wrapped experience [in 2025], but not just for AI’s sake. With Listening Archive, AI helped us do something we’ve never been able to do at scale before: tell a story about the listening days that mattered most to you, in a way that’s personal and uniquely yours.”

**PAYMAN
KASSAIE**

Global Brand Director, Spotify



In the age of AI, taste is the ultimate differentiator

With AI's increasing presence in content and ads, human taste is becoming a scarce and precious asset. As Guarav Bhogale, AI & Infra, Mantis Venture Capital, said, "With the ... explosion of AI, the only thing humans have left is taste. And taste is very difficult to be replicated with AI."

Our experts emphasise that taste—the ability to curate based on lived experience and cultural nuance—will become the defining characteristic of superior platforms.



“You’re going to win by having humans in the loop who have good taste. And if you can be the taste-making entity amidst all the algorithmic fury, you’re going to differentiate both sides of that K-shaped future.”

MIKE BECHTEL

Futurist, Professor, Former Deloitte Chief Futurist

Human taste in Spotify’s editorial strategy

Spotify has long distinguished itself by taking a people-driven and algorithmic approach to curation, which has led to the creation of flagship playlists like RapCaviar and Viva Latino, moments-driven content like Beast Mode and Chill Tracks, and unique fan experiences like Wrapped and Billions Club Live.

Our editorial team of 100+ humans is intentionally working to evolve editorial curation, or the storytelling context around the creator content, particularly how we can ensure a human touch as part of any experience on Spotify.hundreds of millions of people.



“We refer to our roles as editorial, but they also involve curation. Editorial is the storytelling, the context: ‘Why is this important? Why is it culturally relevant?’ The curation is, ‘What song? What artist?’ There’s an art to combining both. As we look to the future, the editorial side is becoming even more critical. **We are doubling down as human music editors in music discovery and trend forecasting.**”

SULINNA ONG

Global Head of Editorial, Spotify



CHAPTER 3

DELIVERING A *SOUND-ON* STRATEGY

What it means for marketers

A sound-on future requires a sound-on strategy. Audio is no longer a supporting channel. It is foundational. In a fragmented media plan, audio provides emotional continuity, stabilizes attention, and drives impact across all formats.

As consumers actively choose sound and voice becomes the interface for discovery and action, a brand without an audio strategy is at best benign and at worst absent. While competitors are building memory in moments that matter, brands without an audio point of view are simply not being heard.



“Brands need to stop thinking about audio as a bolt-on, and start thinking about it as a foundational element to their plan.”

TAMMY HENAULT

Chief Marketing Officer
(formerly NBA, Paramount+, The New York Times)

“[Sound] is a pretty wonderful way to quickly create emotional connections, which is a big conundrum in the marketplace right now. How do you emotionally connect in a world of AI slop? Sound is the way to do it.”

AMY LANZI

CEO North America, Digitas



The shift is underway.

The consumer behaviors are already established, the technology is already scaling. The future of media will be defined by who can create time well spent, not just time spent. The question is not whether audio will matter, it's whether brands will catch up to the pace of their audience who are already streaming it.

The Sound-On Era is about recognizing that voice is once again how culture moves, and ensuring your brand has something worth saying when it does.

Some tips from Spotify's Creative Lab on how to embrace the sound-on era:

Start with audio. Don't adapt to it.

Audio should have a defined role from the very beginning of your marketing strategy, not be retrofitted at the end of the planning process.

When you brief it early, you can:

- Define what audio uniquely delivers, like emotion, intimacy, and memory
- Build ideas that work powerfully without visuals
- Develop sonic territories alongside visual identity
- Consider Spotify a strategic partner, not a supporting format

In the sound-on era, sound needs to be in the strategy, not just the production plan.



Build sonic craft, not just ads.

Think long-term memory, not one-off messaging.

The most effective audio strategies don't rely on a single script, they build recognizable assets over time.

That could mean:

- A distinctive voice or tone
- A consistent music world
- A repeatable sonic mnemonic or signature

Just as visual identity compounds in value, so does sonic identity. Audio works best when it's building something cumulative, not disposable.

Create for the moment.

Spotify isn't one environment for many, it's 751M+ unique fan mindsets: focus, workout, commute, wind-down, and more.

The most effective brands design audio that reflects the moment the fan is in.

- Adapting tone by mindset
- Aligning with genre or activity
- Writing scripts that feel native to what the audience is doing right now

When audio matches the moment, it feels less like interruption and more like participation.

**Explore how Spotify can help you
build your sound-on strategy.**



METHODOLOGY

A mixed quantitative and qualitative approach was used to capture both breadth and depth of insight. In partnership with Bold Insight, “The Sound-On Era” research programme comprised a consumer study, an advertiser survey, expert interviews, and advertiser co-creation sessions.

Consumer Survey: A survey of N=5,000 audio app consumers across five markets [US, UK, DE, MX, JP] explored behaviors, sentiments, and future outlooks toward media and advertising, with a specific focus on audio.

Advertiser Survey: A survey of N=105 media planners and buyers - all decision-makers - across 12 markets [US, CA, UK, FR, IT, ES, DE, JP, IN, AU, MX, BR] measured current and future attitudes toward media and advertising, with a focus on audio.

Expert Interviews: 16 expert interviews across four global regions examined how media, creativity, and consumer engagement are evolving in response to AI, and the convergence of audio and voice with multimodal formats.

Advertiser Co-Creation Sessions: 13 co-creation sessions with advertisers surfaced perspectives on audio, Spotify, and the future of media from global media leaders.