



An NIQ
Company

Radio360: Audience Unlimited

Life after launch.

Deb Hishon, Media Measurement Director
Australia and New Zealand
GfK

13th March 2024
egta Market Intelligence Meeting, Madrid





Where Australian RAM was before Radio 360



Radio Diary

n=50,000 pa

80% offline paper
20% online ed diary

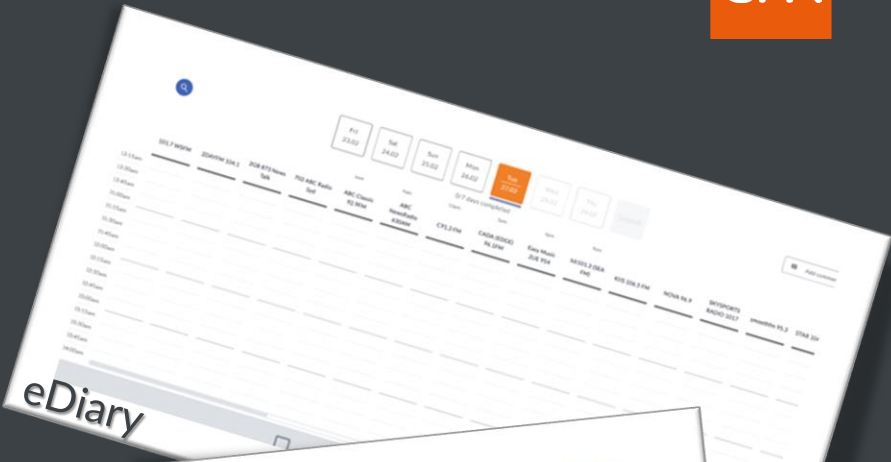
GfK Radio Ratings

100% diary based

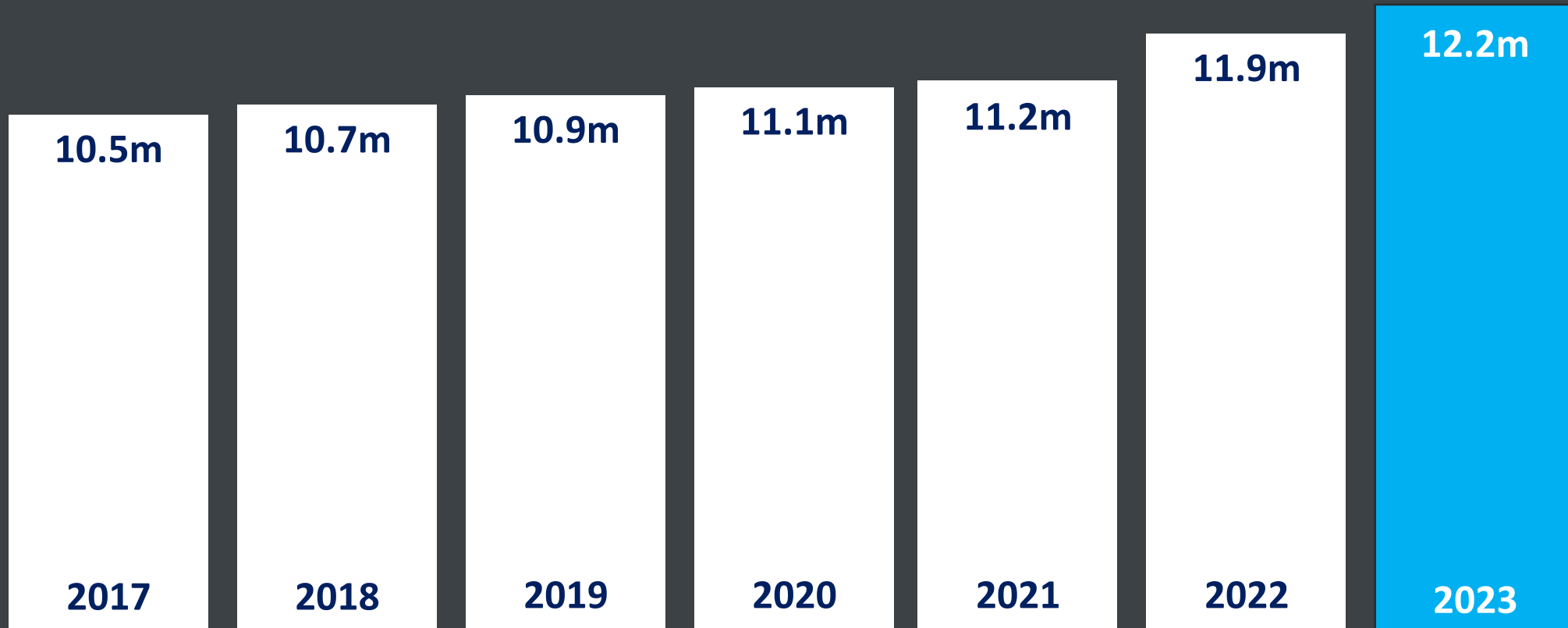
Total radio audience reporting only

Average quarter hour weekly results

'In survey' 41 weeks from 52



Why did CRA want to evolve the currency...with growing audiences?

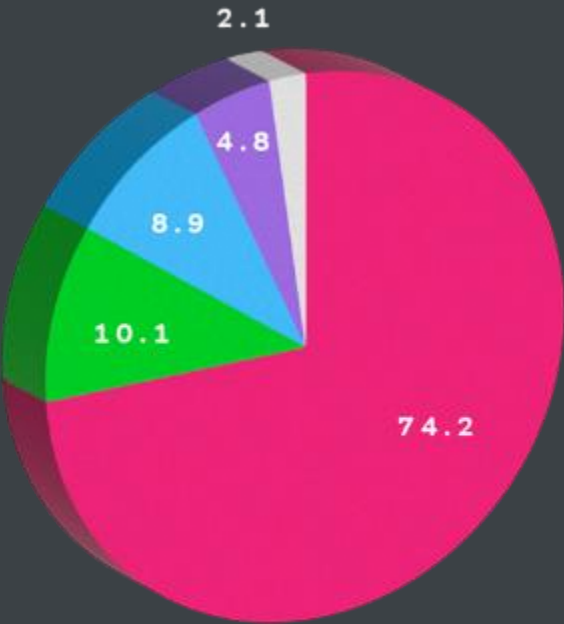


Source : GfK Survey 5, 2023 10+ Mon – Sun 12am -12pm

Why did CRA want to evolve the currency...with strong audio share?



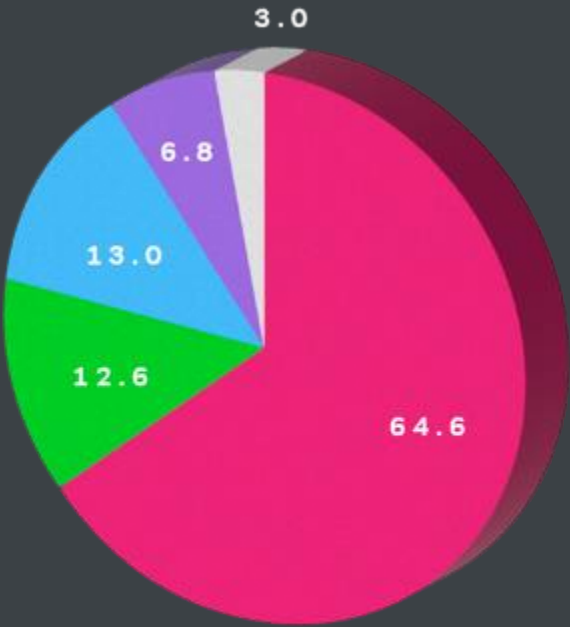
TOTAL



COMMERCIAL SHARE



PPL 25-54



- COMMERCIAL RADIO
- FREE MUSIC STREAMING
- FREE PODCASTS
- ONLINE MUSIC VIDEOS
- TV MUSIC CHANNELS

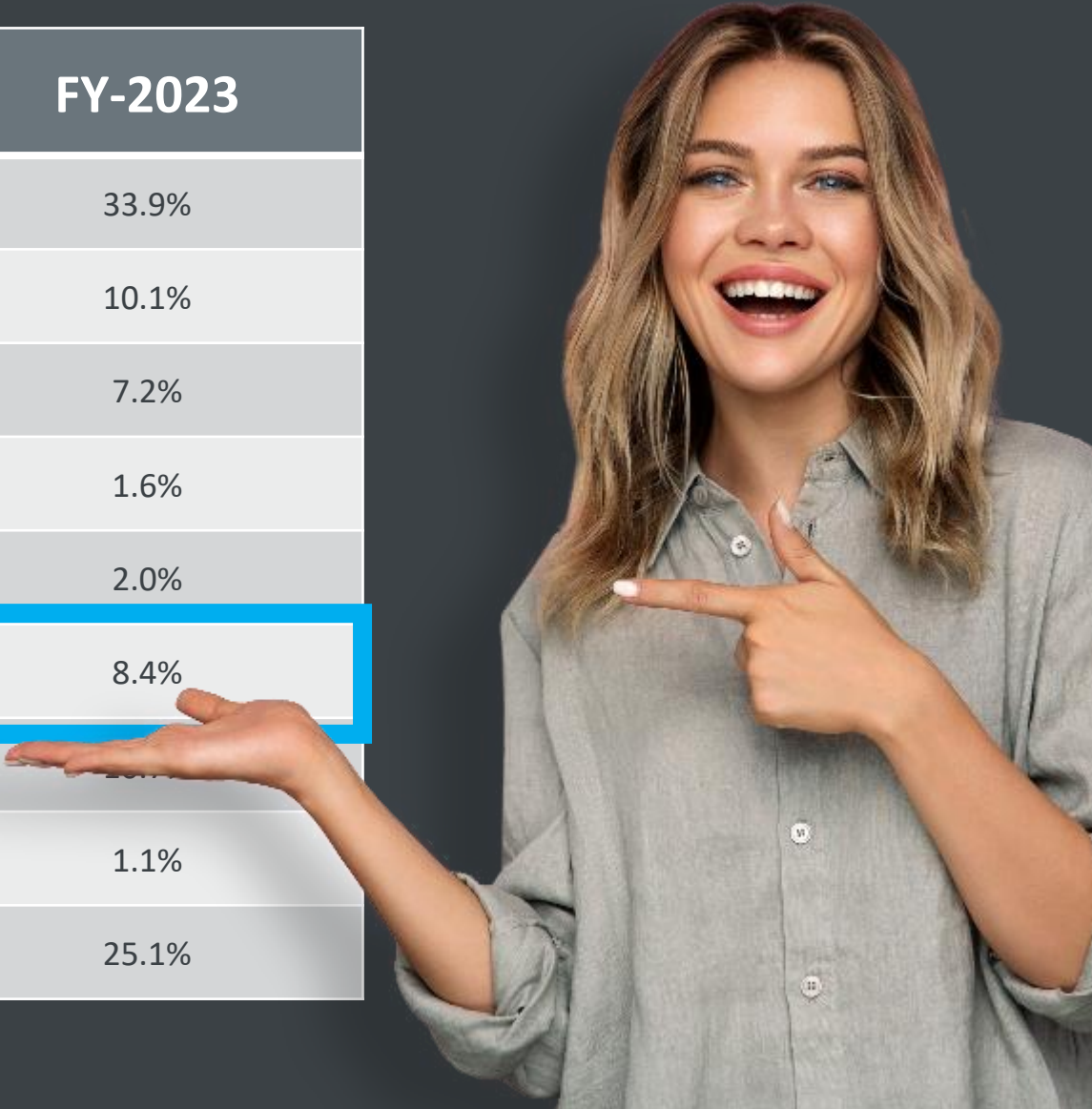
egta March 2024: Madrid, Spain

Source : GfK Share of Audio 2022
© GfK

Why did CRA want to evolve the currency...with stable revenue?



Media Type	FY-2022	FY-2023
Metropolitan Television	33.1%	33.9%
Regional Television	9.6%	10.1%
Metropolitan Press	6.8%	7.2%
Regional Press	1.6%	1.6%
Magazines	2.0%	2.0%
Metropolitan Radio	8.0%	8.4%
Out of Home	8.9%	8.4%
Cinema	0.8%	1.1%
General Display	29.2%	25.1%



Why did CRA want to evolve the currency...?



The radio diary methodology is viewed in the Australian media industry as outdated, inaccurate and not on par with the way other media is measured

The Guardian Sept 4, 2017



Enhancing Measurement Confidence:
Address concerns re limitations of diaries



Capitalizing on Digital Audience Potential:
Unlock digital budgets



Keeping up with Market trends:
Other mediums updating their methodology



UNLOCKING GROWTH POTENTIAL

gfkradio360: a hybrid radio audience measurement system



Radio Diary

n=50,000 pa

80% online **ediary**
20% offline **paper**



Streaming Data

Station server logs for
total streaming volume

GfK Sensic SDK tag
captures cross station
listening patterns

Device level data is
converted to audience
using **bayesian**
probability modelling
and GfK defined **co-**
listening algorithm



GfK MediaWatch Panel

National panel n=2000

Streaming validation
through platform audio
matching possible due to
signal time lag

gfkradio360

AM/FM/DAB+ Audiences
and **Streaming** Audiences
now provided

Event Audience
Measurement

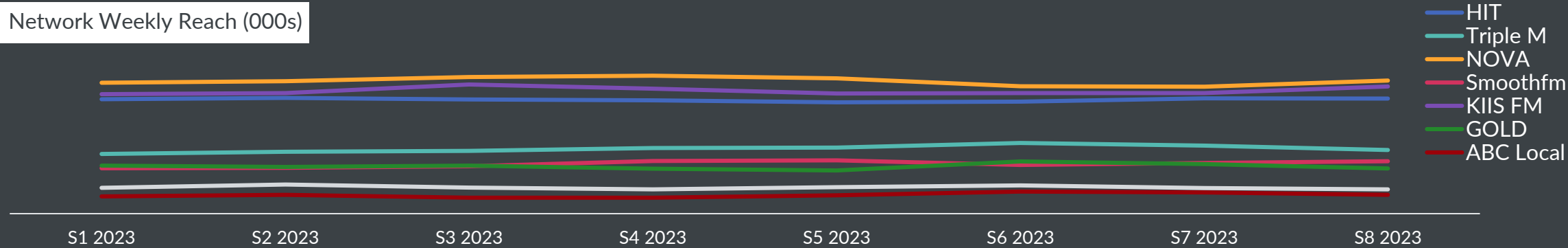
Out of Survey
Insights

Measuring Market Impact



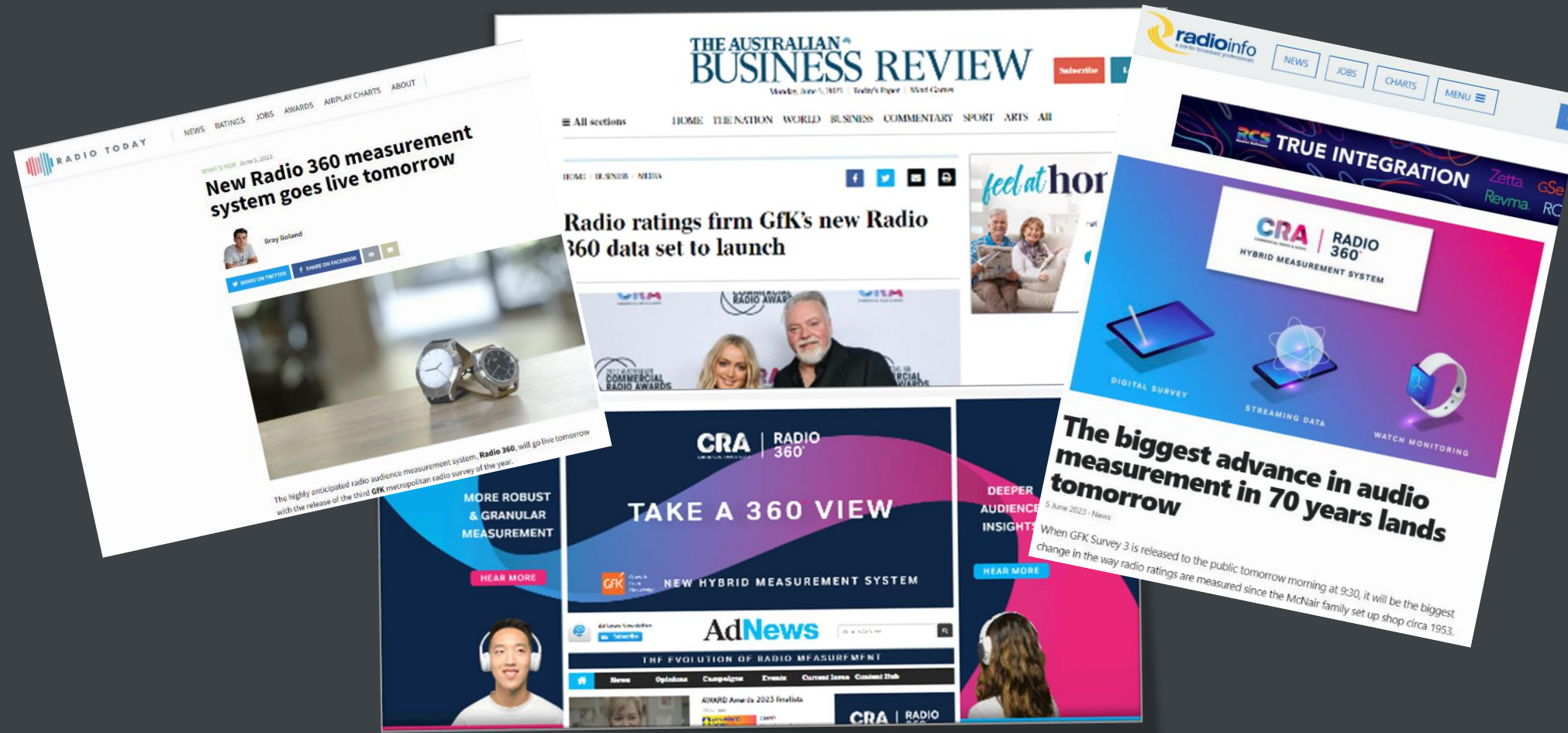
Objective 1: consistent currency results

A successful methodology change with no trend break



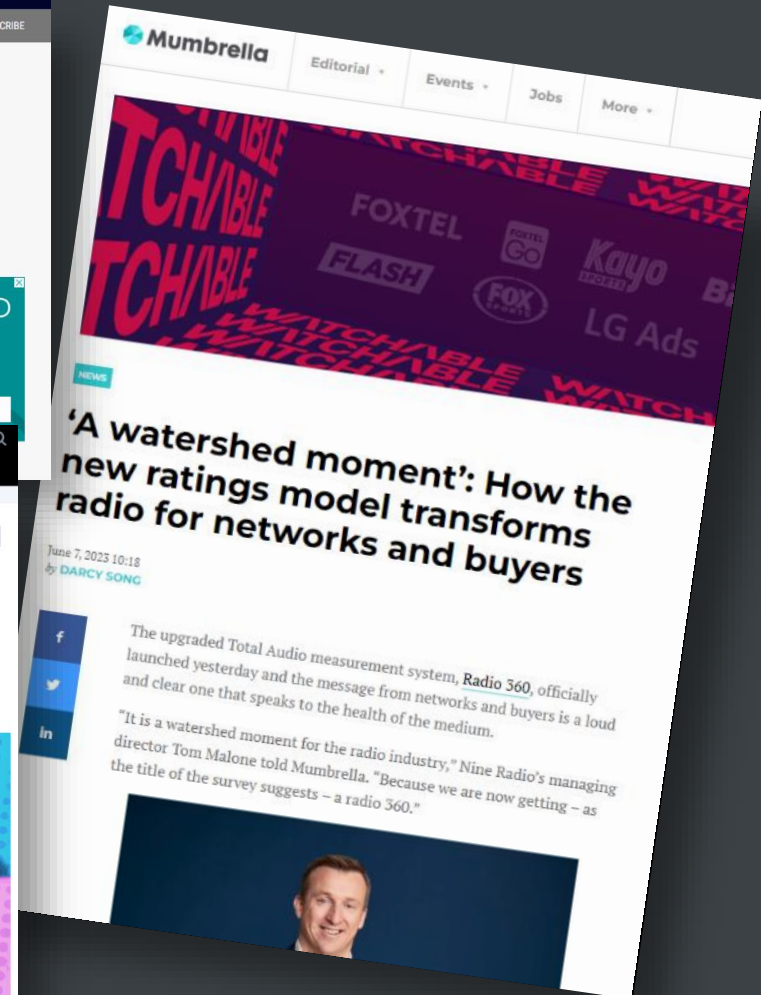
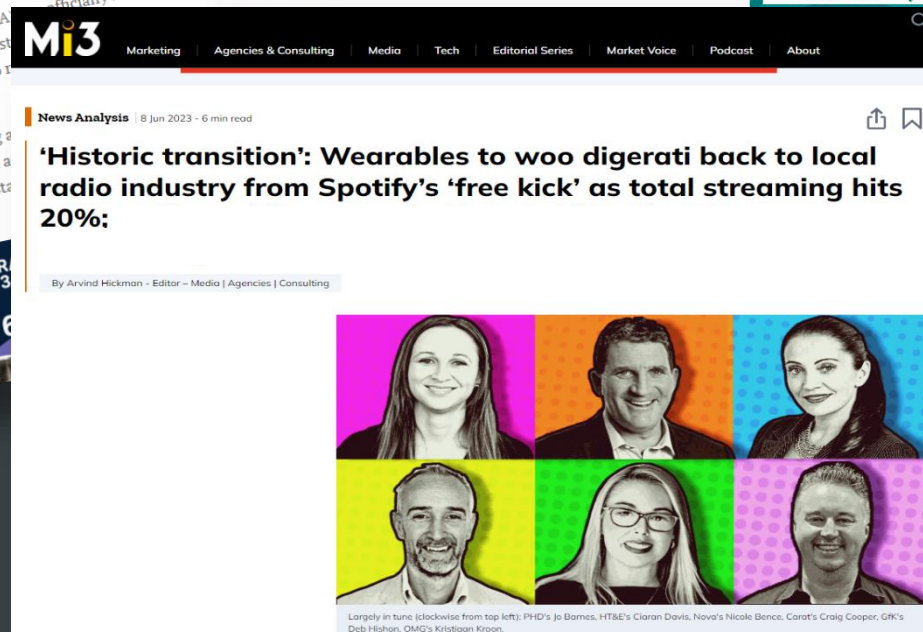
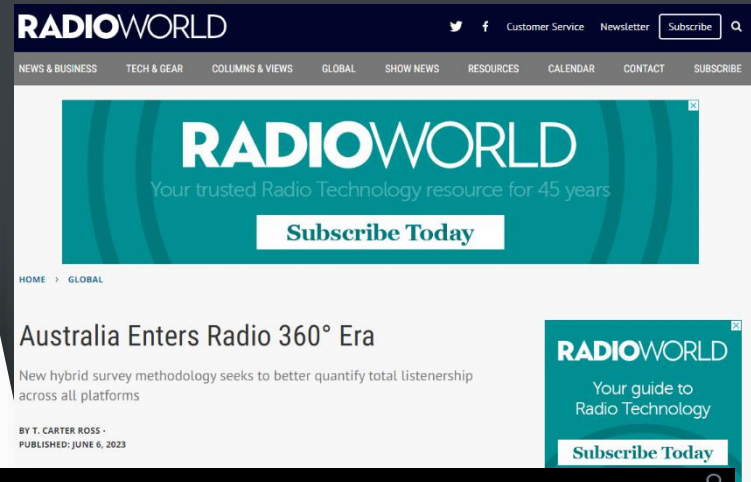
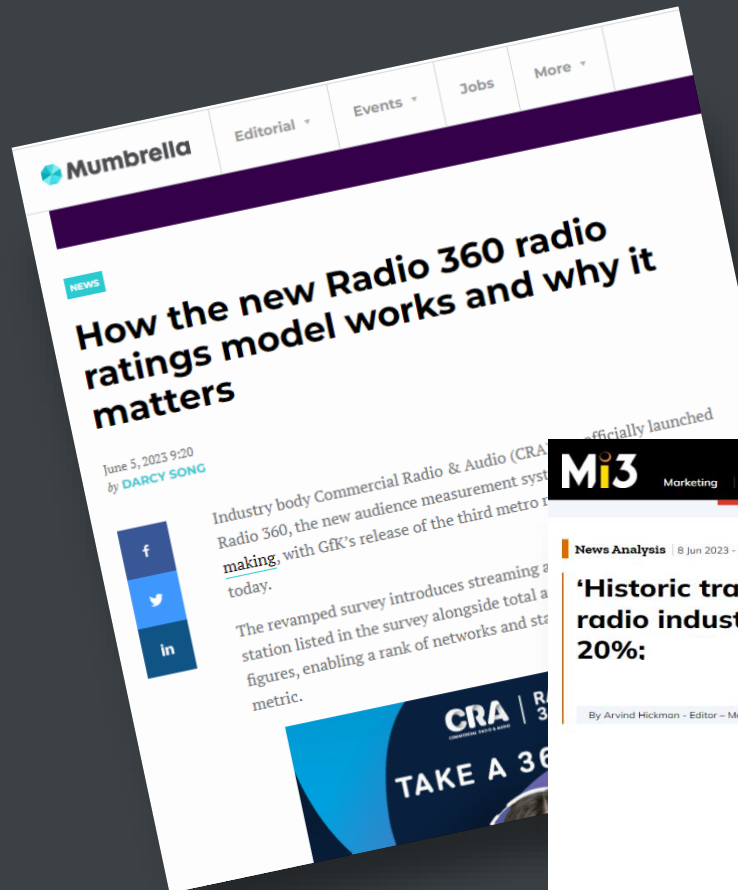
Objective 2: enhance the ratings credibility

Have we pushed past the negative perception of the previous methodology?



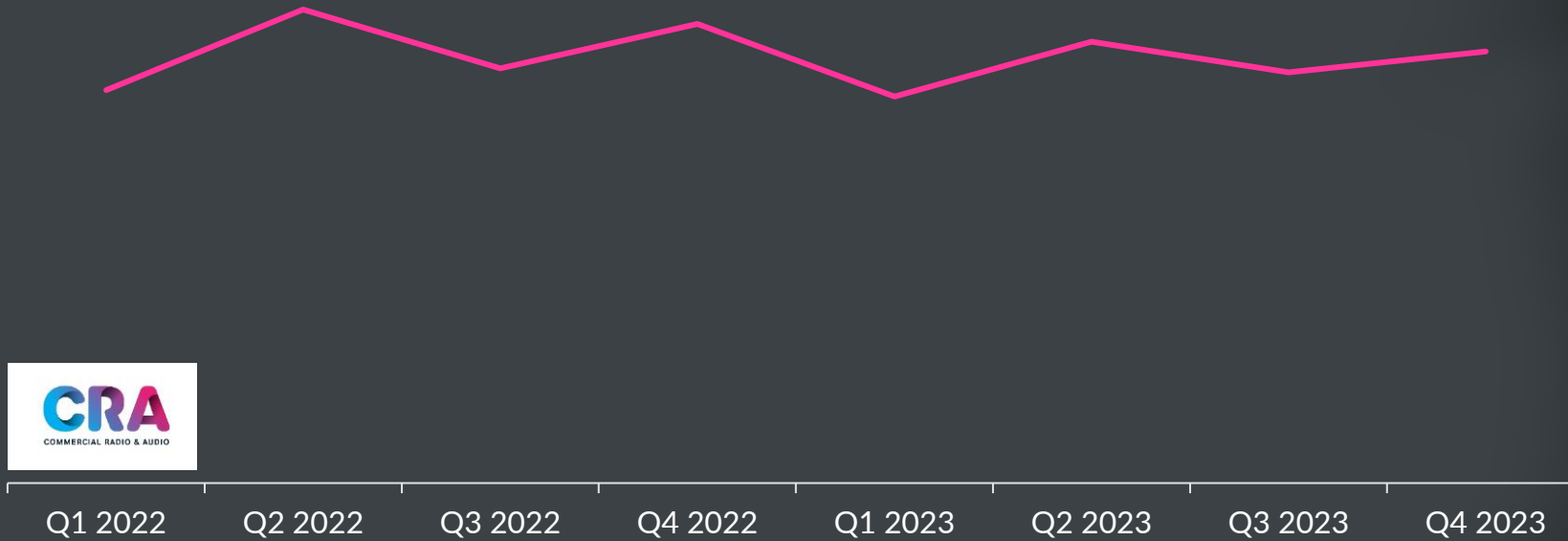
Objective 3: evolved and future proofed currency

Are clients now satisfied that our ratings system is a step forward in measurement?



The ultimate objective: build revenue

Have we seen an impact in the radio revenue numbers since launch?



Source: Commercial Radio & Audio: Metropolitan Revenue Ad Spend Estimates Milton Data



Transforming the
understanding of
our audiences

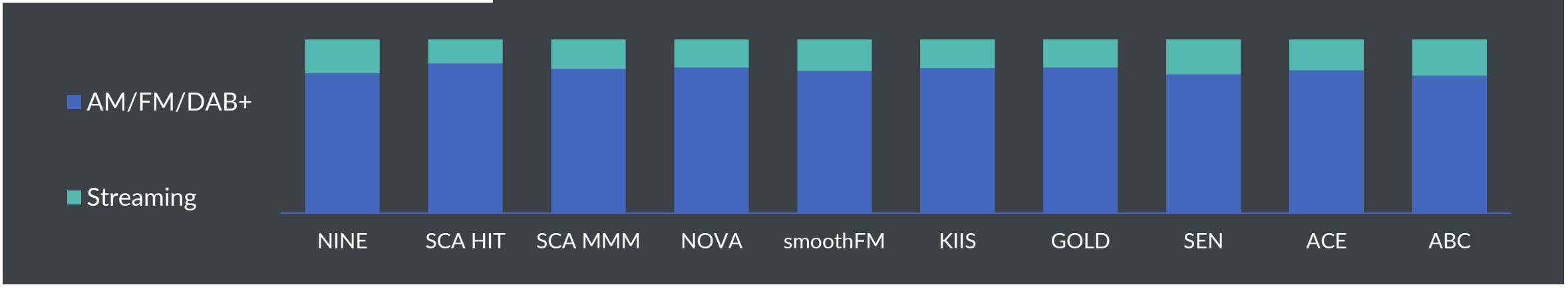


Deeper understanding of the competitive streaming landscape

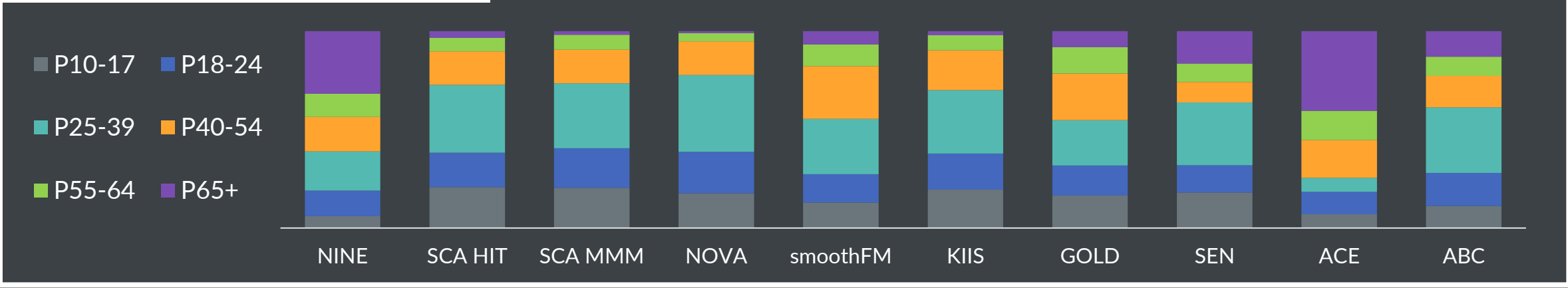
A critical step for commercial strategies



Streaming % of Listeners by Platform



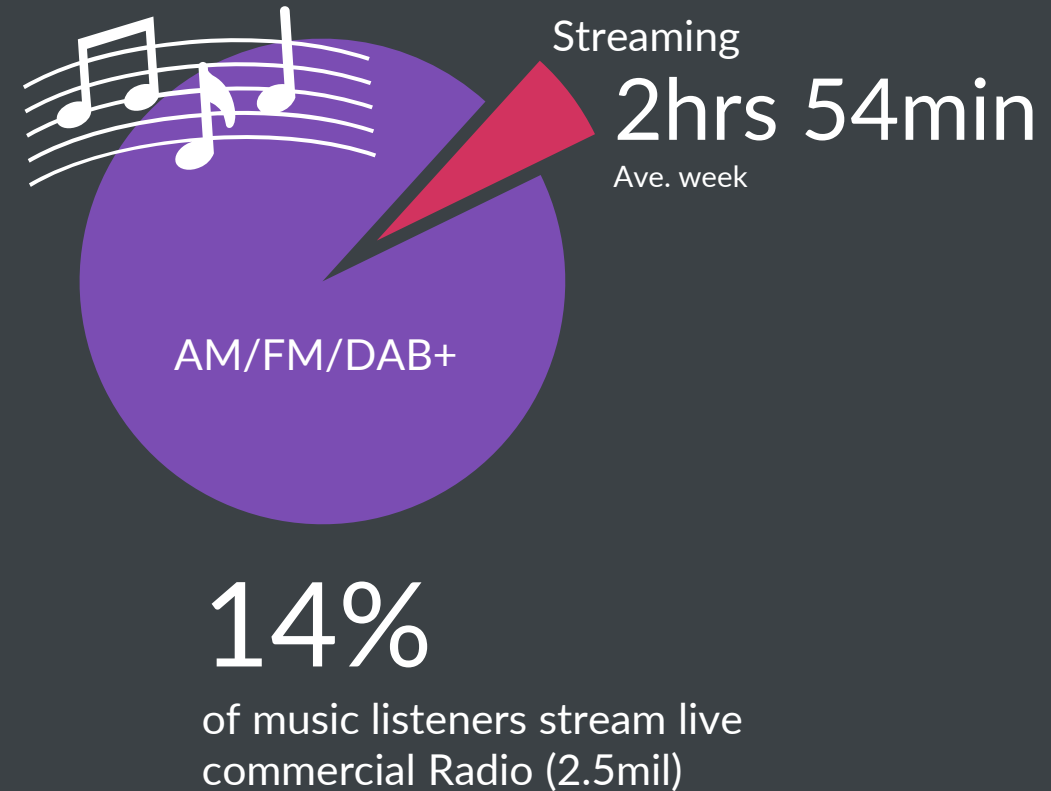
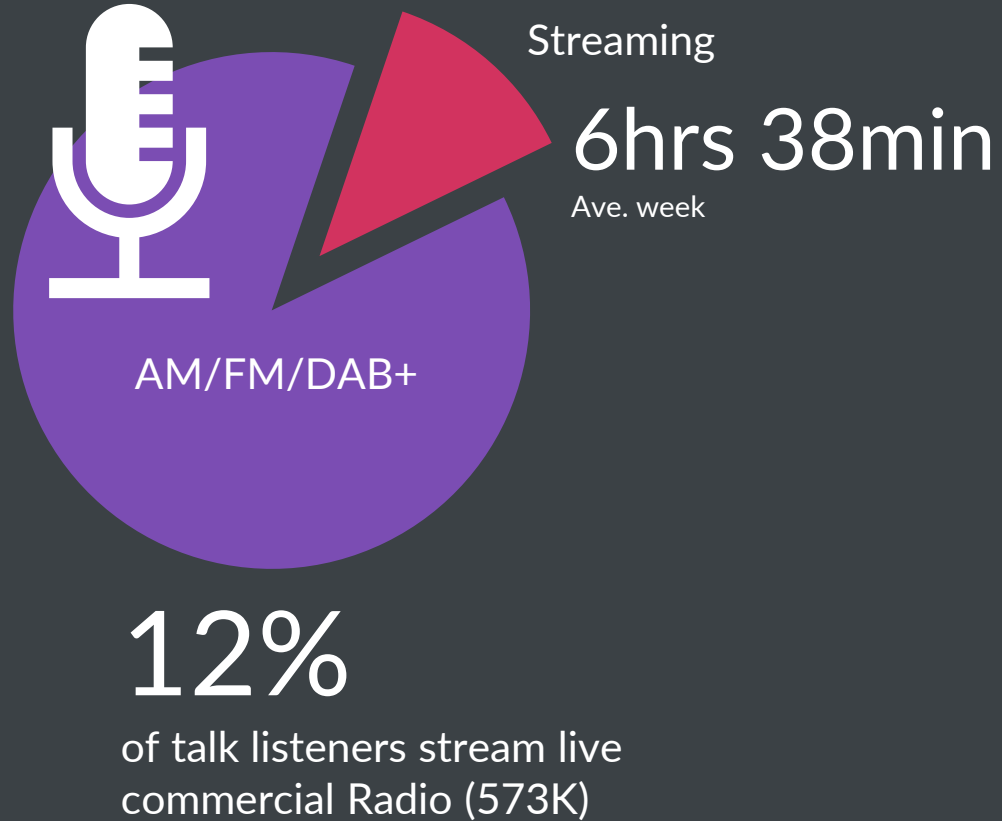
Profile of streaming listeners



Source: GfK Radio 360 Survey 5 2023 ; SMBAP Mon-Sun 12mn-12mn, Listener Profile (Cume 000)

Streaming popular across all station types

Talk station format has higher TSL for streaming, music stations see higher reach



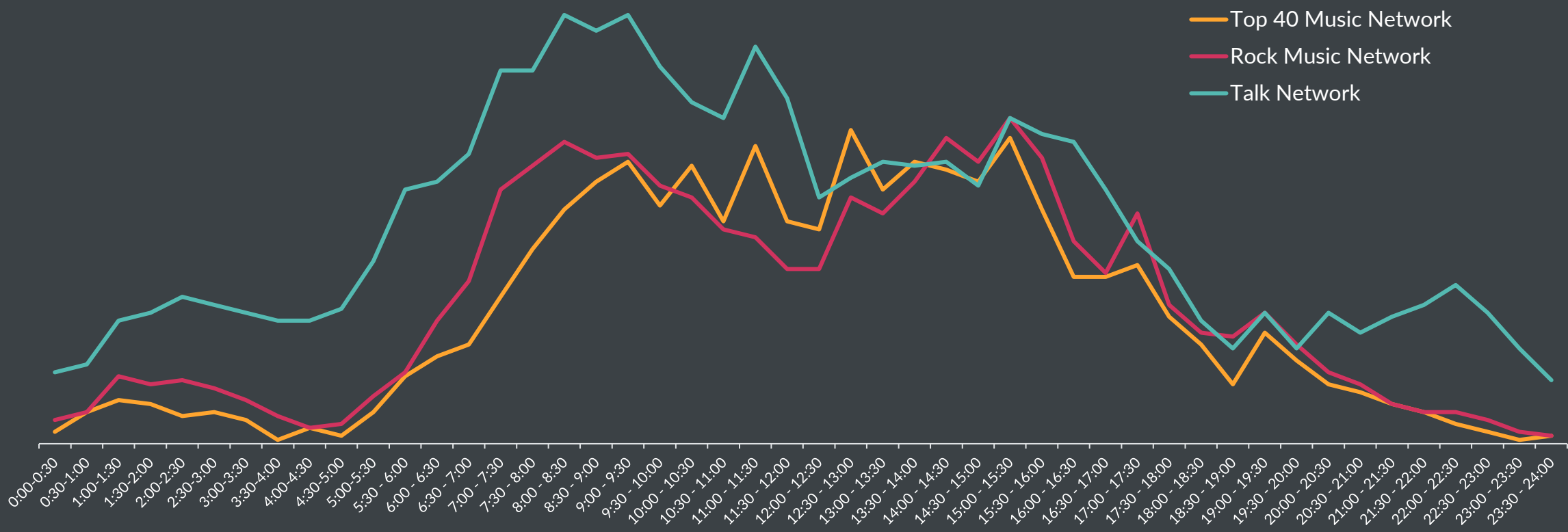
Source: GfK Radio Ratings, SMBAP S3-5 2023, P10+, Mon-Sun 12mn-12mn

Different formats, different shape of day

Audience sizes changes along with when they stream



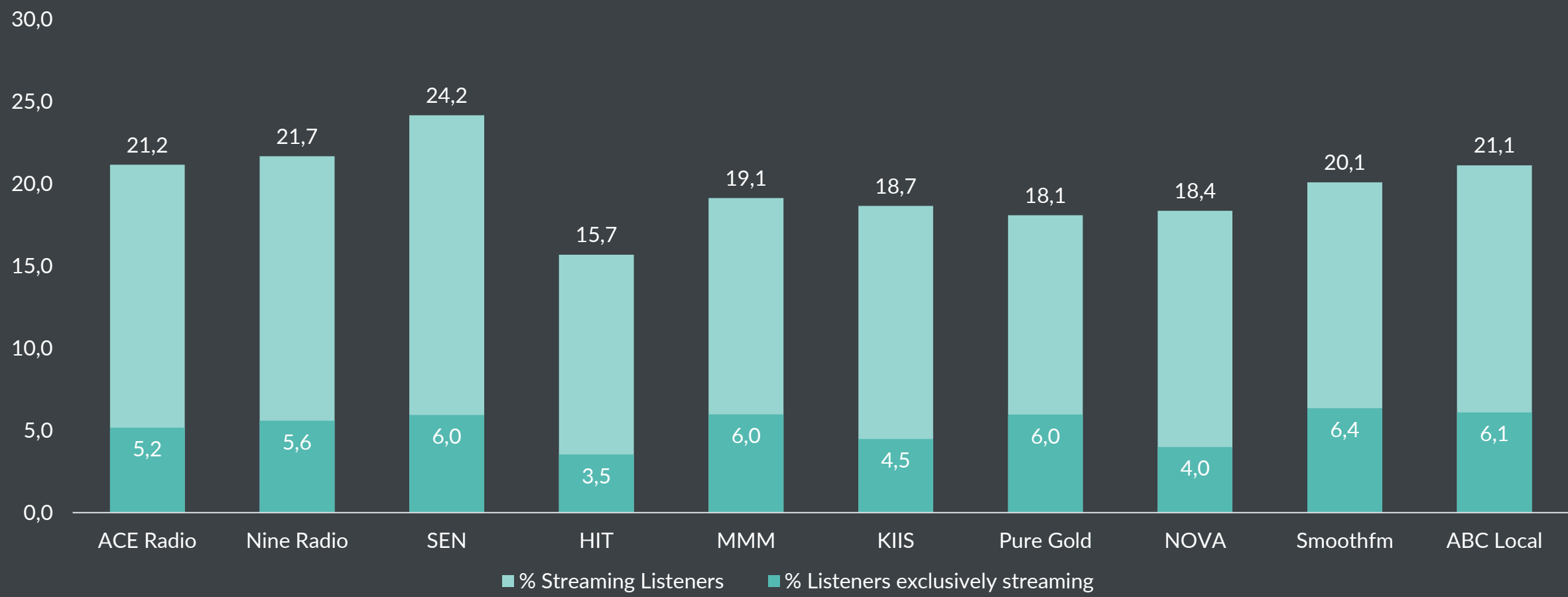
Streaming Shape of Day Mon-Fri



Source: GfK Radio Ratings, Survey 3-6 2023, SMBAP, P10+, Mon-Fri 12mn-12mn, Cume

Exclusive streaming audiences, a new opportunity

How do we harness this new commercial asset?



Source: GfK Radio Ratings, Survey 3-6 2023, SMBAP, P10+, Mon-Sun 12mn-12mn

Challenges and the Future



The challenges that lie ahead

Better targeting, commercialisation planning, protecting the core while building revenue



Commercially, radio's ability to sell streaming radio-only campaigns is limited by scale, ... a need for **more data enrichment to conduct better targeting.**



Justin Stone

Director of Research & Insights,
ARN



...the market is **not quite ready to trade 100%** in stream ad replacement ... working with the industry and clients through a **transitional phase**...more comfortable and familiar



Marissa Bohm

Head of Research – Total Audio,
Nine



...**plan for audience, not platforms**...it'll be a different approach...but they'll start thinking outside of their job descriptions and outside the channels they've learned in the past."



Anthony O'Callaghan

Head of Marketplace, Essence
Mediacom

Meeting the challenge...

INCREASE SHARE OF
REVENUE PIE

NEW COMMERCIAL
PATHWAY

STREAMING
ENRICHMENT
SOLUTION

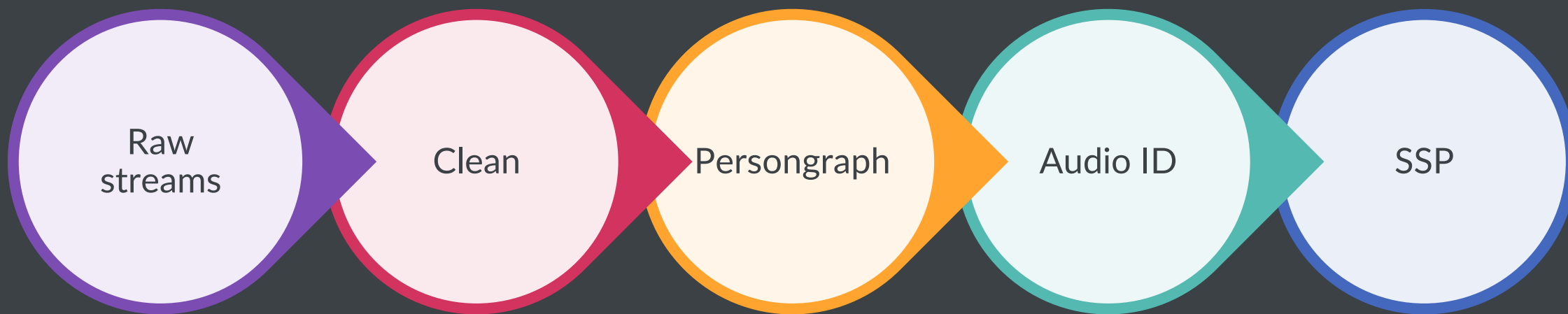
HOW CAN WE
EXPAND MODELLING
AND AUDIENCE
ATTRIBUTION FROM
RADIO 360

COMMERCIAL RADIO
STREAMING
COMMERCIALISATION
MODEL

...CONCEPTUALISATION
UNDERWAY

Unique ID Concept Flow

Using Radio360 as the base...





gfkradio360: what the journey has provided...

Hybrid RAM is now tangible and proven

Radio360 designed to be flexible and adapt to market needs

Evolution comes from building on existing framework and tech

Data Integration is the key to the future of audience measurement