



An NIQ
Company

gfkradio360

Mediapulse Event Zurich, Switzerland

Deb Hishon
Media Measurement Director
Australia and New Zealand

14th March 2024



Agenda

- 1 The Australian Radio Industry and Audience Measurement
- 2 GfK Radio 360
- 3 Australian vs Swiss Methods
- 4 Insight into the market impact of Radio 360 and next steps
- 5 GfK Radio 360 data source comparison

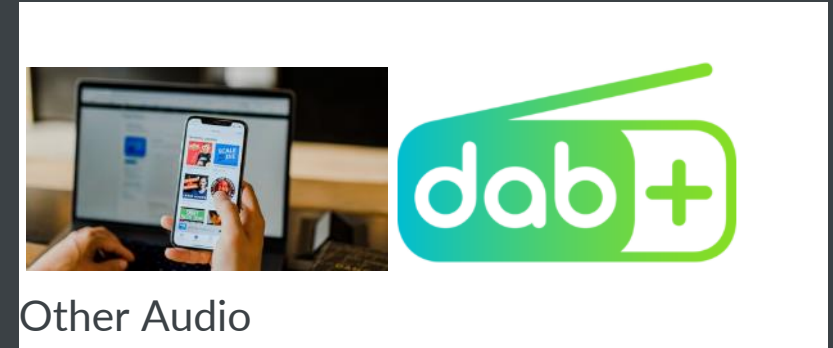
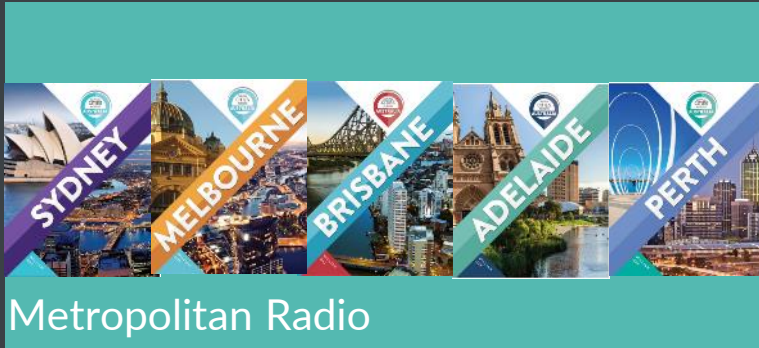


1. Australian RAM Business Overview



Australian Radio Industry

Resilient and strong, commercial radio continues to hold position in media landscape
Commercial Radio & Audio represents all radio stations across the country



- 2023 value approx. €405mil
- Dominated by 4 National Networks
- 6 smaller single or multimarket networks support
- Large national government broadcaster (non commercial)
- Approx 12.2mil commercial radio listeners

- 250+ smaller commercial regional radio markets
- 2023 value approx. €250mil

- Podcast growth – 42% Australian's listening monthly (GfK Radio360)
- Podcast IAB revenue 2023 - €60mil
- DAB+ Radio continues to grow, tripling audience since 2020

Radio Audience Measurement in Australia

Managed and owned by CRA



Commercial Radio & Audio
Industry Joint Committee



Oversees currency and other research,
industry legislation and government
lobbyists.



Promotes and drives commercial
audio marketing and effectiveness
to advertisers



Maintains Gold Standard R&F protocol
for a competitive ratings analysis
software environment

Surveys are funded:
Commercial Radio Stations (80%)
Australian Broadcasting Corporation (5%)
(non-commercial & government funded)

Supported by the Media Agencies (15%)

CRA employs an independent auditor to
audit the sample and survey procedures



Accessing the GfK Radio Ratings

Subscriber base only with limited public release



- Subscriber only access to average week, quarter hour data only for all markets across all platforms
- CRA releases summary data via a survey dashboard on their website
- Multiple Gold Standard Software providers providing multiple options for data analysis software for networks and agencies (e.g. GfK Probe)

CRA COMMERCIAL RADIO AUSTRALIA

FIND A STATION RESOURCES ADVERTISERS RADIO SURVEYS PODCAST RANKER RESEARCH ABOUT US

Table Chart

GfK Xtra

ACRA dob RADIOAPP

GfK Growth from Knowledge

MARKET: Sydney DEMOGRAPHIC: P 18+ GROUP: Overall M 5-50a 12a RECENT: Share to All RADIO TYPE: Total Radio STATION TYPE: AM/FM

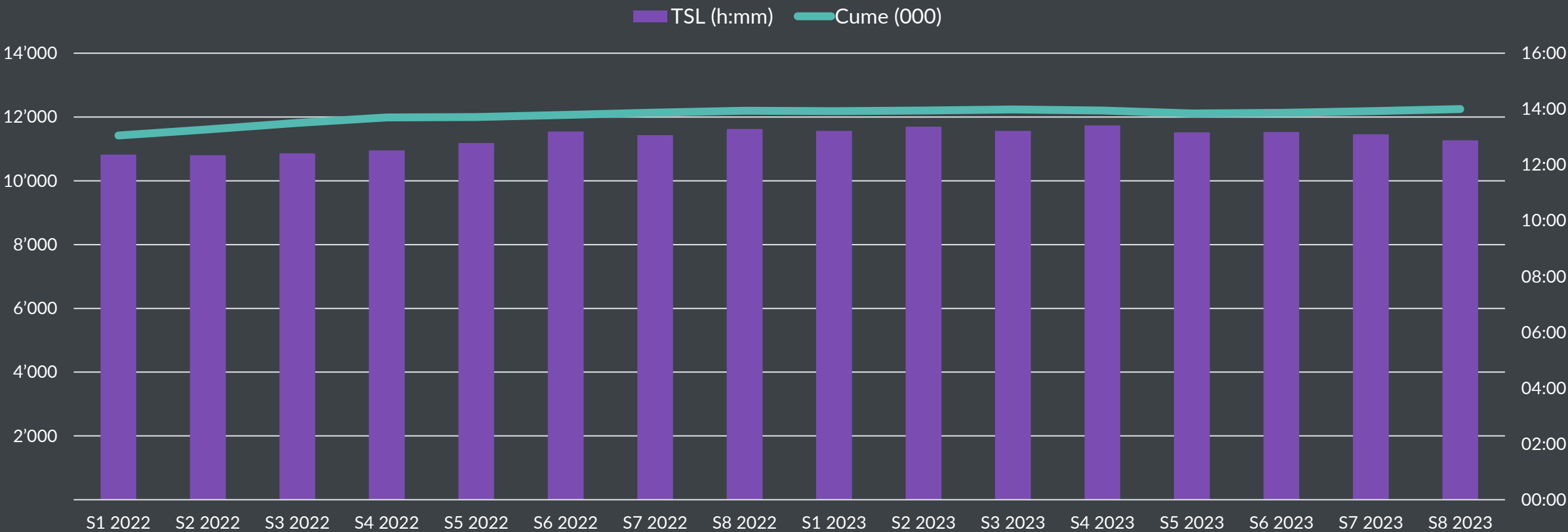
Station	S0 2023	S1 2023	S2 2023	S3 2023	S4 2023	S5 2023	S6 2023	S7 2023	S8 2023	S9 2023
SEN 11/12am	0.4	0.6	0.7	0.8	0.9	0.9	0.9	0.9	0.7	0.9
2GB	12.1	12.4	11.1	11.6	14.2	12.2	11.8	11.0	11.0	12.5
2GB 154	3.3	4.0	4.3	3.8	3.3	4.5	4.4	4.5	4.5	4.5
Sky Sports Radio	1.2	1.7	1.6	1.4	1.5	1.5	1.6	1.5	1.5	1.5
104.1 104.1 FM	5.3	4.7	4.8	5.1	5.2	5.3	5.6	4.7	5.3	5.3
KISS106.5	11.5	11.5	10.9	10.0	12.0	13.0	11.5	11.9	11.6	11.6
104.9 104.9 FM	5.3	5.4	6.1	6.0	5.1	5.3	6.1	5.0	6.4	6.4
NOVA 96.9	7.7	7.0	6.4	6.7	7.3	7.1	6.6	7.0	7.1	7.1
smoothfm 95.3	11.4	10.8	9.1	9.9	11.2	10.8	9.7	10.3	10.4	10.4
WFSM	9.0	8.8	8.8	8.3	7.8	7.8	9.4	8.9	8.7	8.7
ABC 510	6.0	7.0	7.3	6.1	5.6	6.5	5.9	5.9	6.3	6.3
2RN	1.0	1.0	1.2	1.4	1.0	0.8	1.1	1.3	1.7	1.7
ABC NEWSRADIO	2.2	1.9	1.8	1.7	1.4	1.2	1.9	1.8	1.6	1.6
2JJJ	3.6	3.3	4.3	5.0	4.3	3.8	4.0	4.9	4.3	4.3
ABC CLASSIC	2.5	2.7	2.8	2.8	2.4	2.8	2.7	3.3	3.1	3.1

View CRA PDF release page

Powered by Audology

Stability of currency key focus of industry

Consistency also in rankings; top 5 stations consistent in each market



Source: GfK Radio Ratings, Mon-Sun 12mn-12mn, P10+, SMBAP, Commercial Radio Stns, Total Radio

2. The GfK Radio Ratings in Australia



Radio 360 Data Delivery

Consistent with prior to hybrid launch



8 Metropolitan surveys per year – Radio 360

- Sydney and Melbourne 2400 each market per survey
- Brisbane 2000 per survey
- Adelaide 1750 per survey
- Perth 1850 per survey
- Released via a rolling survey schedule, in survey 41 weeks of the year across nine waves of sampling periods



3 Main Regional surveys per year – 100% diary

- Newcastle and the Gold Coast 1500
- Canberra 1100
- Released via a rolling survey schedule, in survey 36 weeks of the year across three waves of sampling periods

2024 RADIO SURVEY SCHEDULE										GfK	
Survey Week	Survey Week	Survey Week	Survey Week	Survey Week	Survey Week	Survey Week	Survey Week	Survey Week	Survey Week	Survey Week	Survey Week
1	2	3	4	5	6	7	8	9	10	11	12
1	1	1	1	1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3	3	3	3	3
4	4	4	4	4	4	4	4	4	4	4	4
5	5	5	5	5	5	5	5	5	5	5	5
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9	9	9	9	9	9	9	9	9	9	9	9
10	10	10	10	10	10	10	10	10	10	10	10
11	11	11	11	11	11	11	11	11	11	11	11
12	12	12	12	12	12	12	12	12	12	12	12
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14	14	14	14	14	14	14	14	14	14	14	14
15	15	15	15	15	15	15	15	15	15	15	15
16	16	16	16	16	16	16	16	16	16	16	16
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99	99	99	99	99	99	99	99	99	99	99	99
100	100	100	100	100	100	100	100	100	100	100	100

The Radio Diary

GfK ediary and paper



- 7 day listening diary (80% ediary and 20% paper) with min. 8 minutes listened to recorded for quarter hour
- Individual station level data by quarter hour, place of listening, device used to listen and headphone listening
- Wide range of demographic and lifestyle data insights also recorded within diary
- Creates average week listening across a survey period of up to 10 weeks
- No insight into specific days or weeks, only averages
- Regional markets continue to have higher levels of paper due to internet panel sizes (80% paper and 20% online)

The screenshot displays the GfK eDiary interface. At the top, there's a navigation bar with the GfK logo and a search icon. Below this, a row of buttons represents the days of the week: Fri (35.00), Sat (31.33), Sun (35.00), Mon (26.00), Tue (27.00), Wed (25.00), and Thurs (28.00). The 'Tue' button is highlighted in orange. Below the day buttons, a row of station names is listed: 101.7 WEFM, 2040 AM 104.1, 202 87.3 News Talk, 702 ABC Radio Syd, ABC Classic 92.9FM, ABC NewsRadio 620AM, CFI 3 FM, CANA 1120G, Easy Music 205.954, 1130.5 10A PM, KIS 101.5 FM, INDIA 76.9, SKYSPORTS RADIO 103.7, and 94.5 The Life. Below the station names, a grid of 24 columns (representing quarter hours) is shown. The first column is labeled '15:00-15:15 Sat', and the last column is labeled '03:40-04:00 Sat'. The grid cells are empty, indicating no listening data has been recorded for this day. At the bottom of the interface, there are two buttons: 'Day not listened' and 'Day completed?'. The 'Day completed?' button is highlighted in orange. In the bottom right corner, there is a link to 'Go to Lifestyle survey'.

The Streaming Data

Station server logs and GfK Sensic tagging



■ Station Server Logs (no SSO): session level volume data without co-listening attributed.

- standardisation (multiple providers)
- requires geo tagging to remove out of area listening
- extreme listening controls
- profiled demographic modelling when ingesting to currency
- co-listening attribution during modelling when ingesting to currency

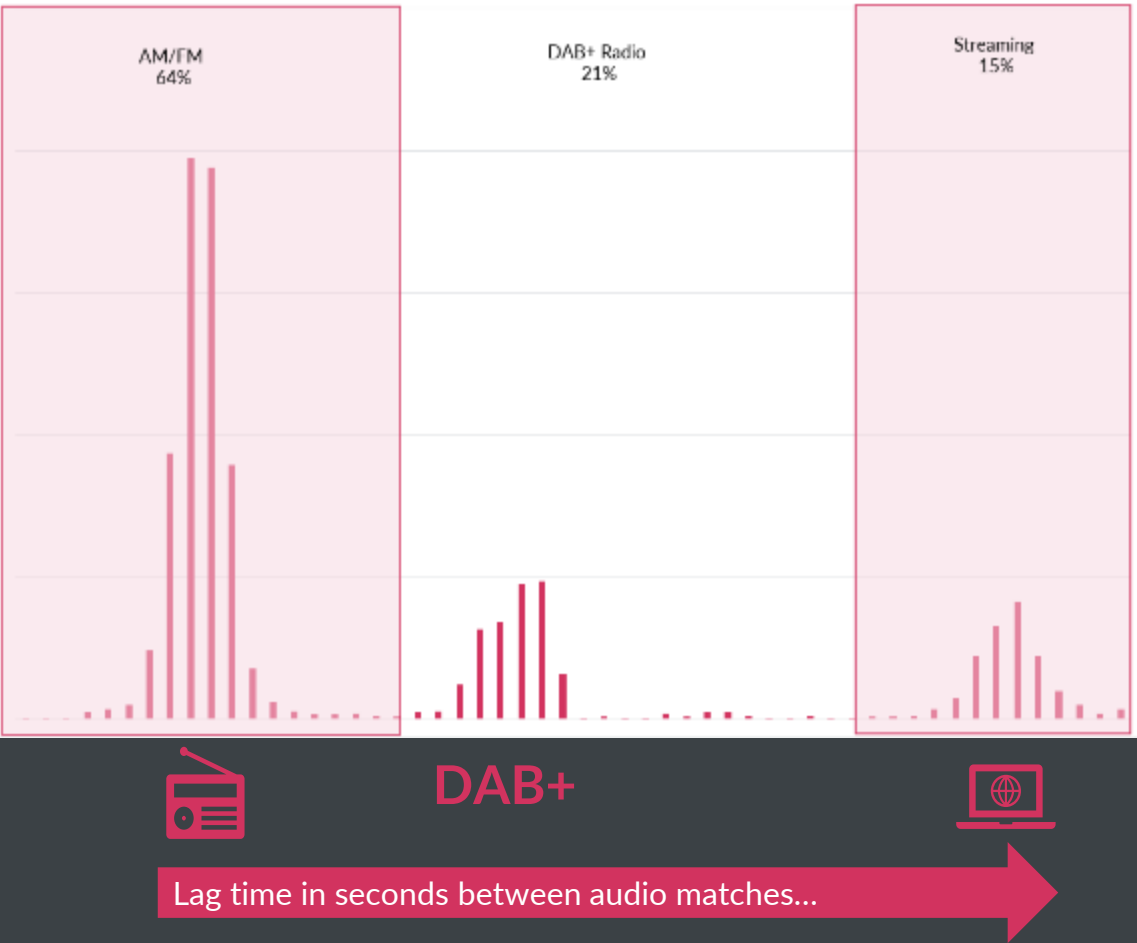
■ GfK Sensic SDK: captures every call to tagged assets

- provides volume and pattern of listening cross checks for validation
- some SSO data via registered users



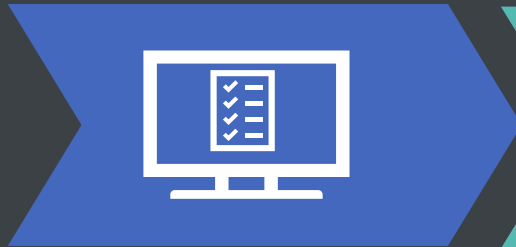
Wearable calibration – using transmission lag to identify platform for our panel

Audio matches for Station A



Station A	GfK MediaWatch	Currency	Radio360
AM/FM	64%	66%	87% (inc. DAB+)
DAB+	21%	20%	-
Streaming	15%	14%	13%

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

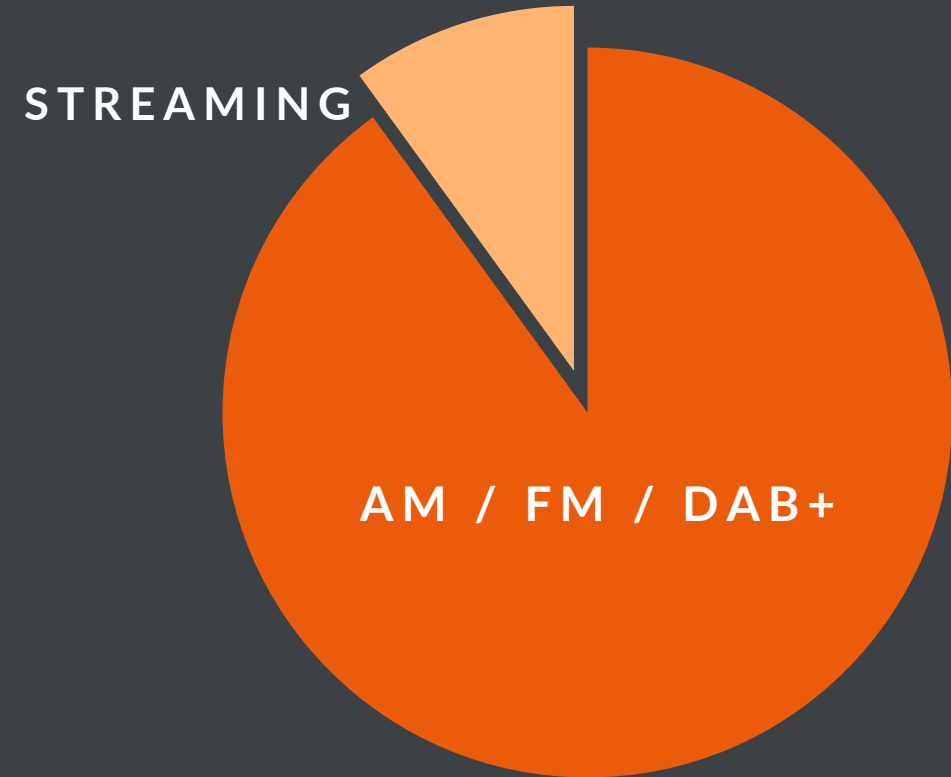
A more accurate and accountable view

Australia's rating always captured streaming audiences but never reported

Previous Methodology
Total Radio



Radio 360
Broadcast and Streaming view



Australia now has a full 360° view of their radio audiences

The inclusion of the wearable also provides event measurement and covers non survey periods



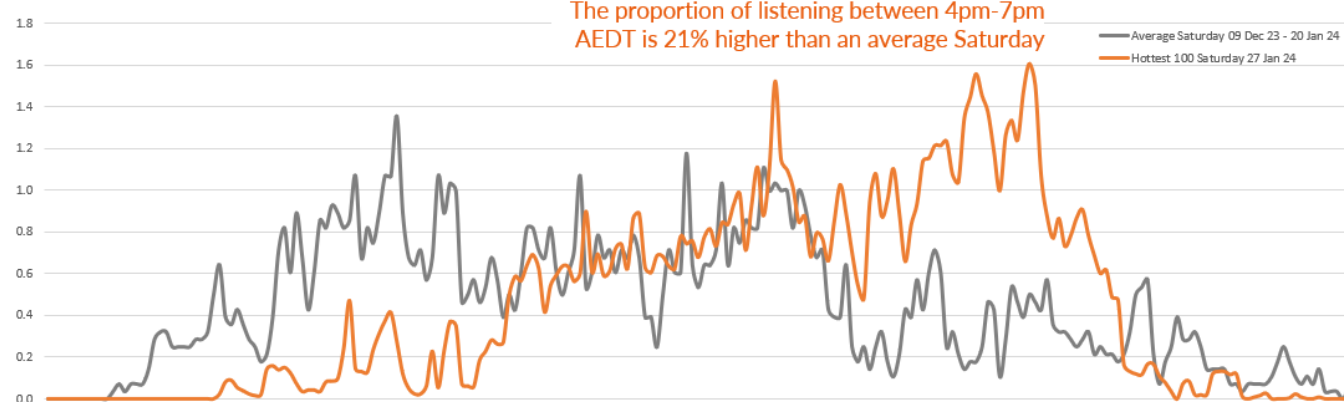
Proportion of listening: total panel

Significant change in listening consumption across the day



Triple J P10+

Proportion of listening across the day



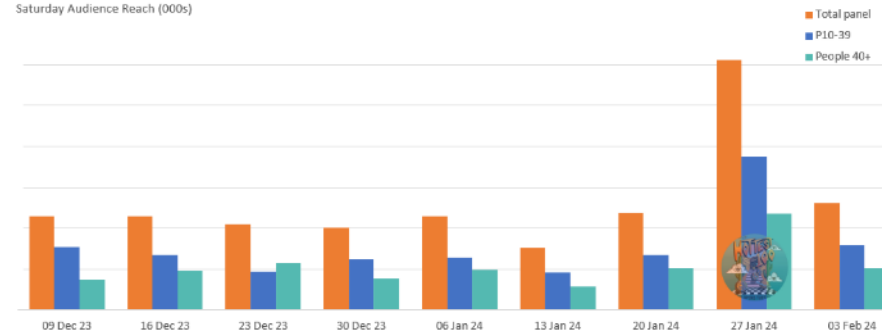
Saturday audience reach trends

P10+ audience grows 156% from previous Saturday, 175% for 10-39 & 130% for 40+



28/02/2024 Source: GfK MediaWatch Panel, SMBAP, listening for 1min or more w

Saturday Audience Reach (000s)



28/02/2024 Source: GfK MediaWatch Panel, SMBAP, Sat 12pm to 12pm, listening for 1min or more within defined period.

© GfK 5

SUMMER VIBES

RADIO LISTENING REMAINS HOT OVER SUMMER

91%
of Ave Daily Radio LISTENERS
continue to listen over Summer

91%
of Ave Daily Radio LISTENING
continues over Summer

+4%
increase in the proportion of total listening
Monday - Friday 9:30am - 3:00pm

+11%
increase in the proportion of listening
for under 40s Monday - Friday 9:30am - 3:00pm

**LISTENERS STAY TUNED TO RADIO
ALL SUMMER LONG!**

GfK Source: GfK MediaWatch Panel, SMBAP P10+, Mon-Sun 12mm-12mm (unless otherwise stated).
Summer period Dec 2 2023 to Jan 28 2024 is compared to the pre-summer period Sept 24 2023 to Dec 2 2023

CRA
COMMERCIAL RADIO & AUDIO

CRA Radio 360 – strengths and weakness...



Strengths

Weakness

Evolved currency perception

Multiple sampling points to improve accuracy

Consistent results, no trend break to disrupt market

Event measurement through wearable

Out of survey insights through wearable

Total radio audiences are reported

Is still based on the diary, which carries overstatement
1/4hr average week base currency; no specific day or
week data available

Currency delivery remains the same regardless of
wearable panel

Two very different 'currency' metrics now available i.e.
full access to wearable cannot be provided to all users

Recall methodology

In survey only 41 weeks of the year

3. Australian v Swiss Methodology



Comparing the two systems...

Hybrid vs Electronic



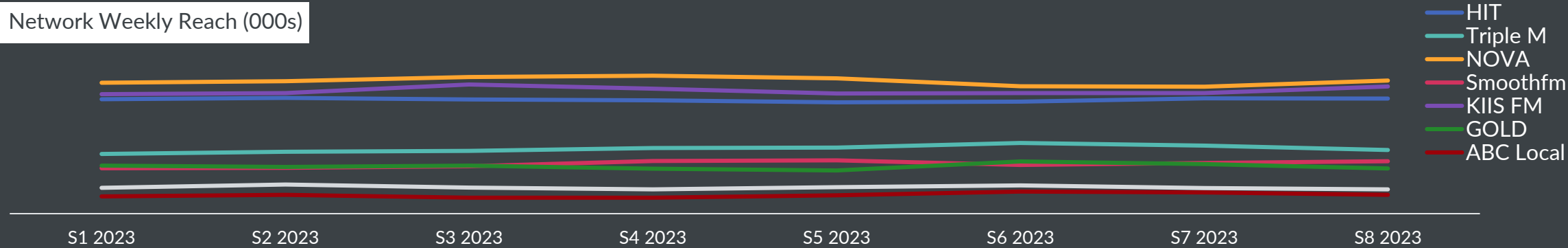
<i>Sample Size</i>	50,000 pa diary / 2000 wearable panel	2,000 daily / ~12,000 per yr.
<i>Research Tools</i>	diary / streaming logs / wearable	wearable
<i>Market level data</i>	5 metro / 3 regional markets	Total CH / 3 language regions/ 34 local regions
<i>Granularity</i>	15min average week results	min x min (sec by sec)
<i>Release schedule</i>	8/yr metro and 3/yr regional	Daily to clients / 2 per yr. published
<i>Event measurement</i>	Yes	Yes
<i>Platform Level Reporting</i>	AM/FM / DAB+ / Streaming	No distinction
<i>Place of Listening</i>	At Home / In Car / At Work and Elsewhere	No distinction
<i>Headphone listening</i>	Yes (captured in diary)	No

4. Measuring Market Impact and Radio 360 Roadmap



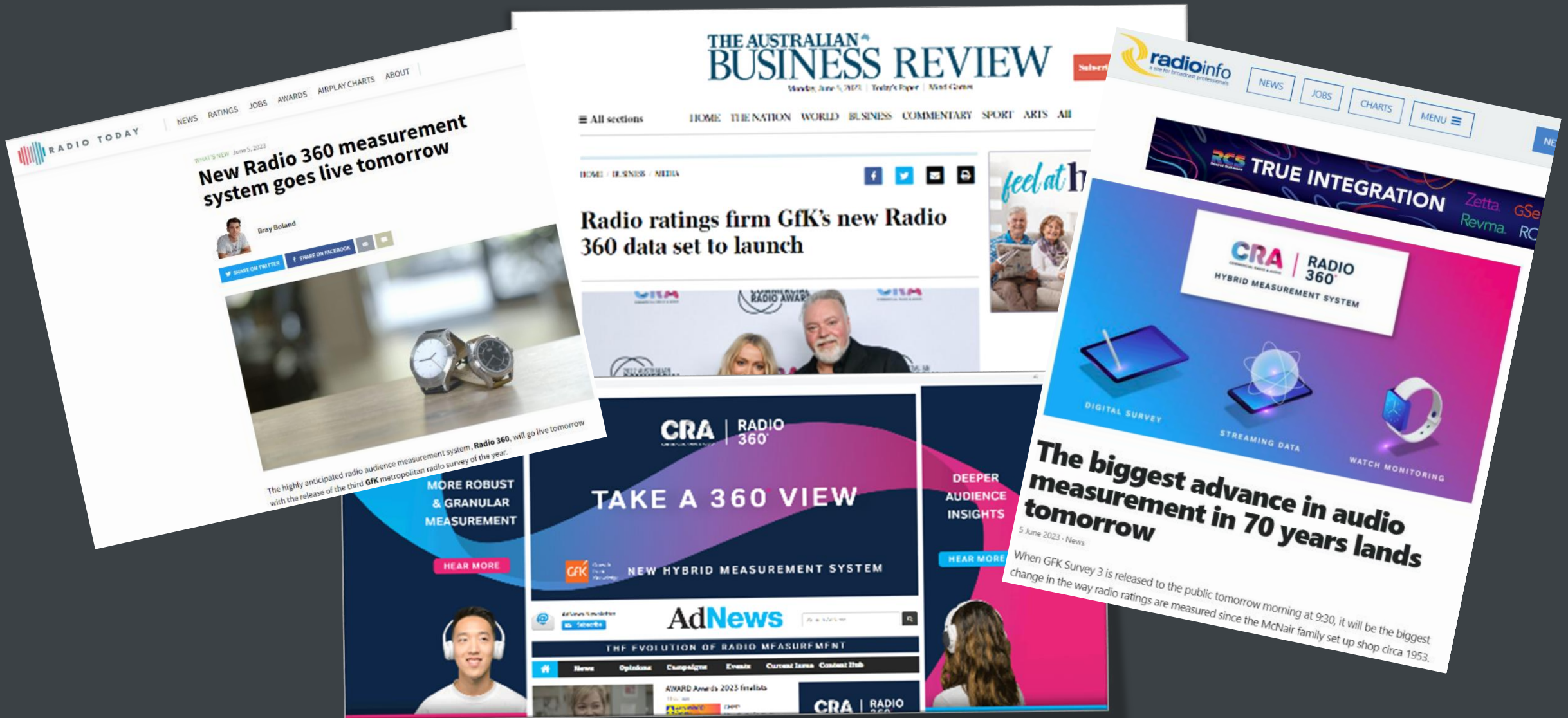
Objective 1: consistent audience metrics

A successful methodology change with no trend break



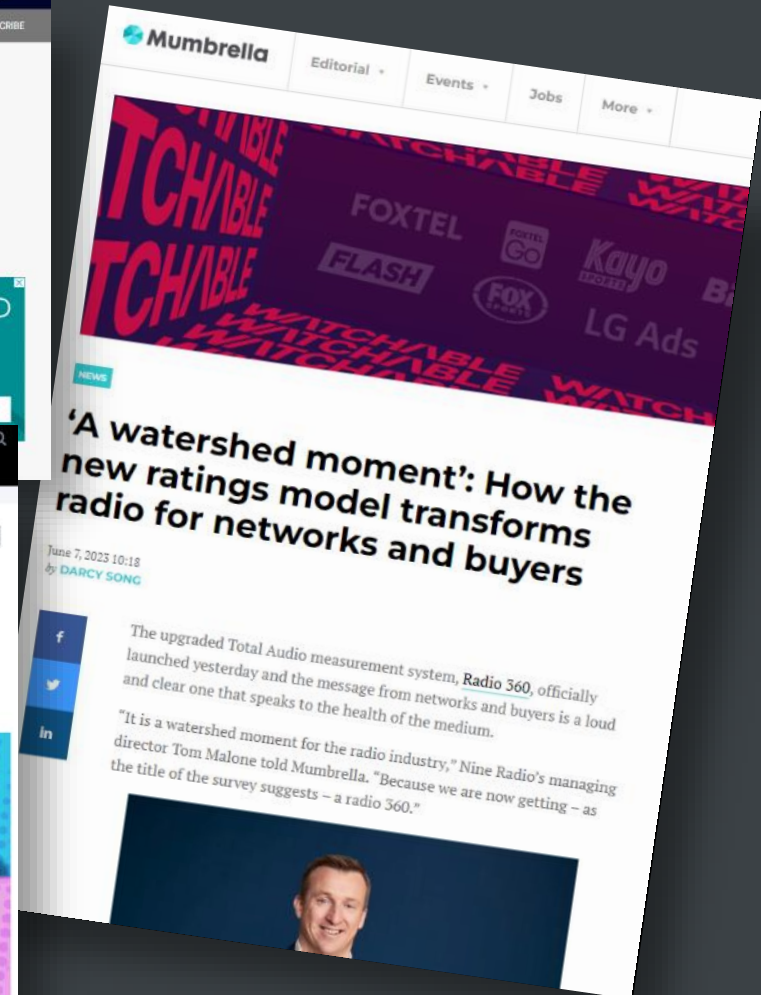
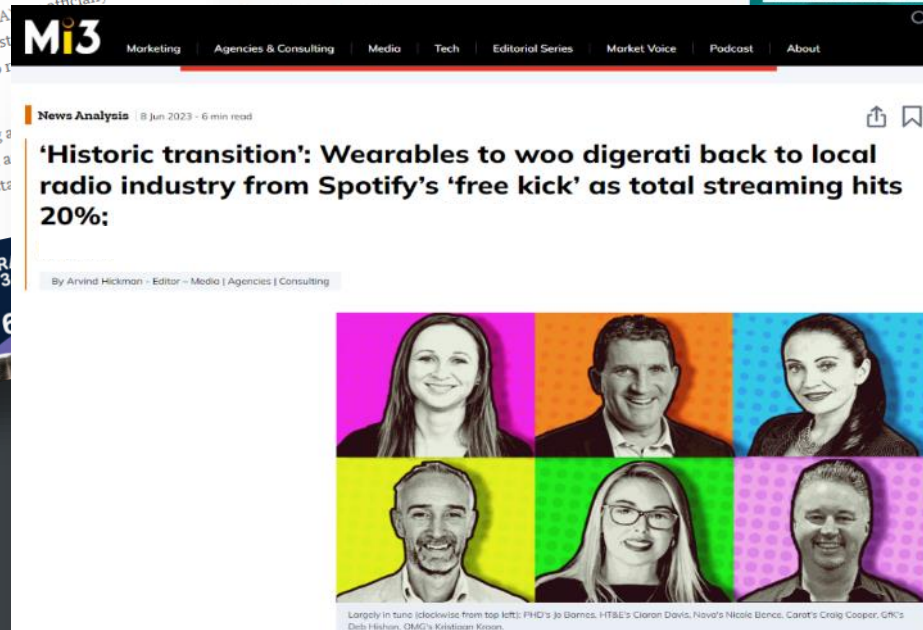
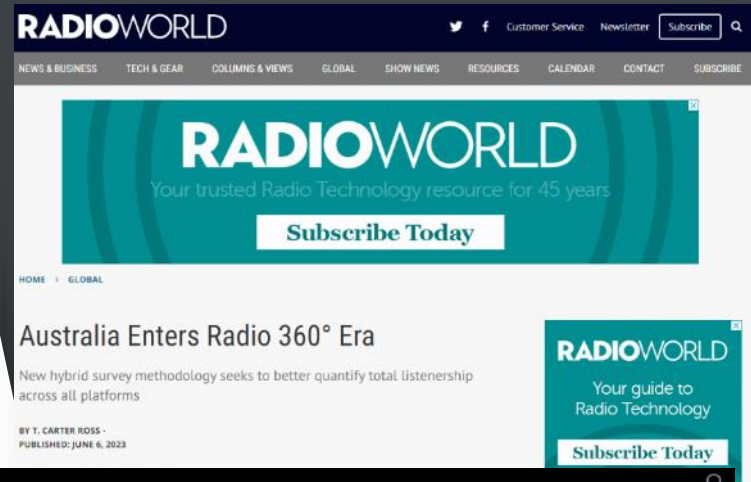
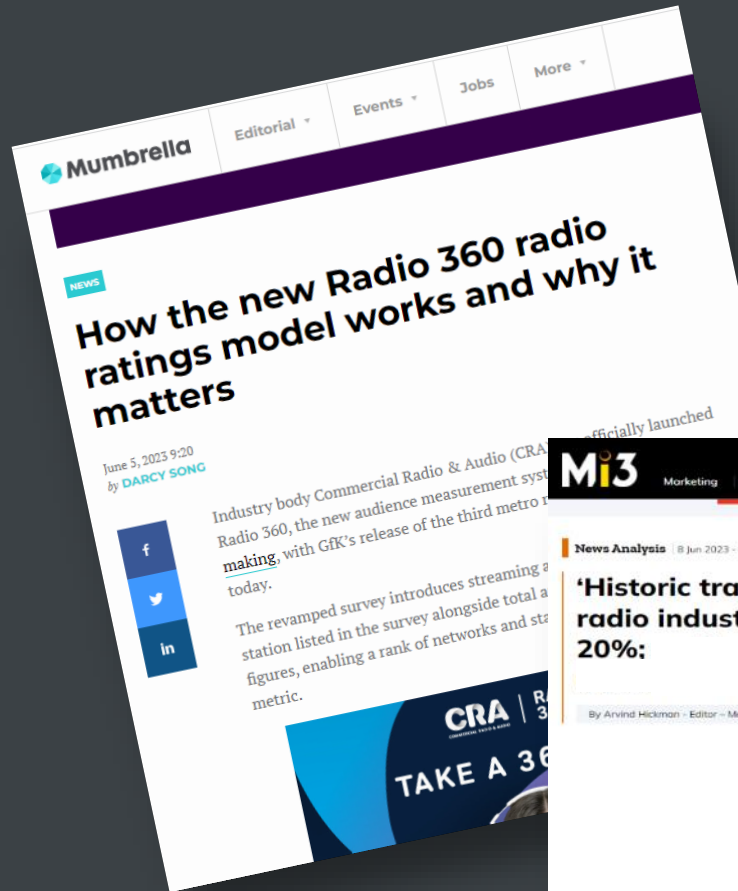
Objective 2: enhance ratings credibility

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



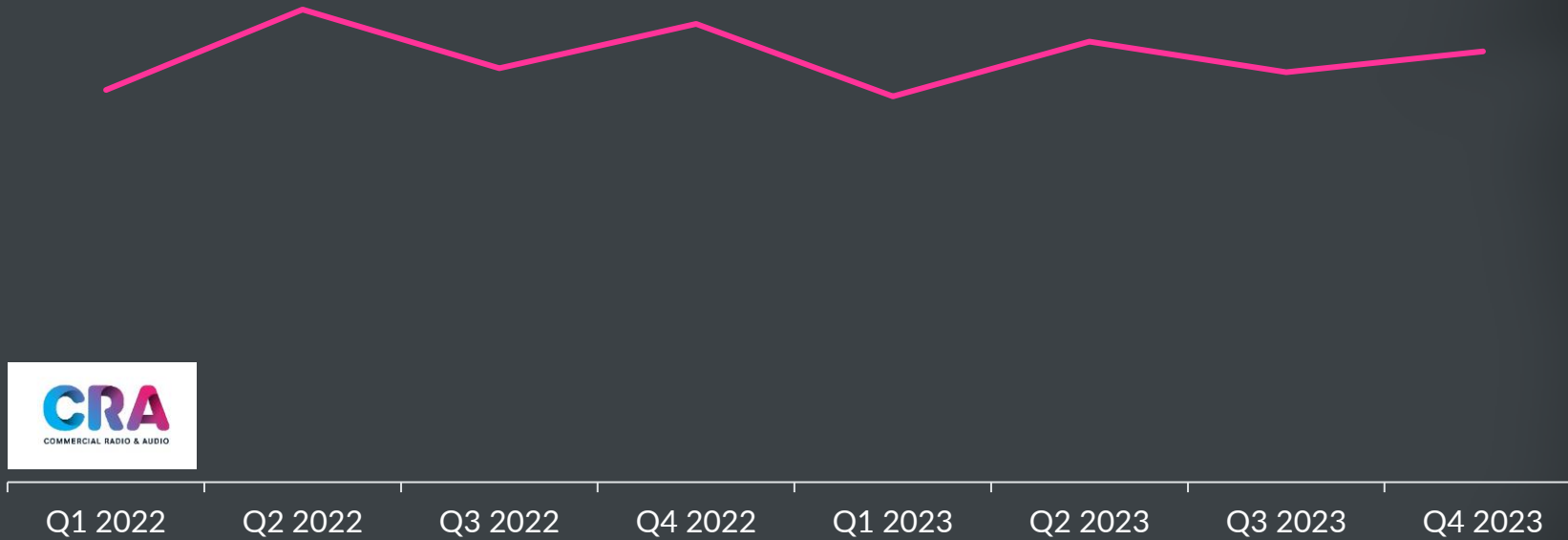
Objective 3: evolved and future proofed

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

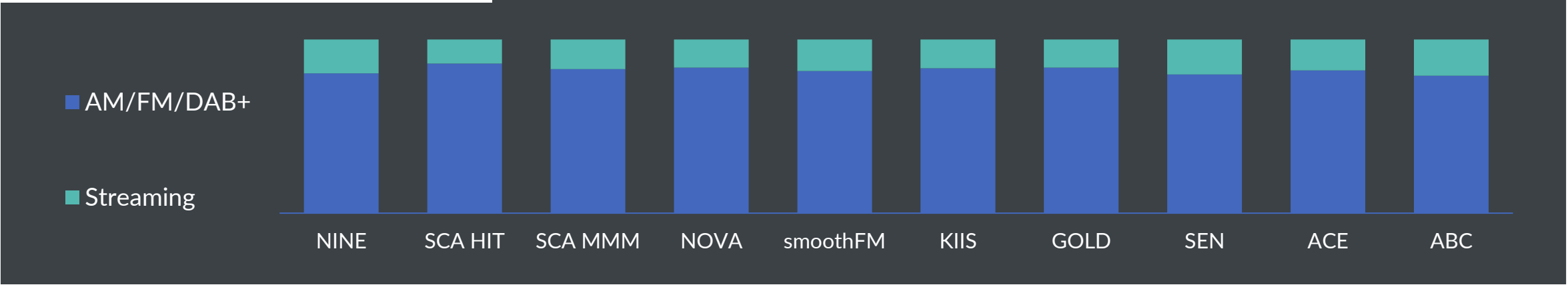


Deeper understanding of the competitive streaming landscape

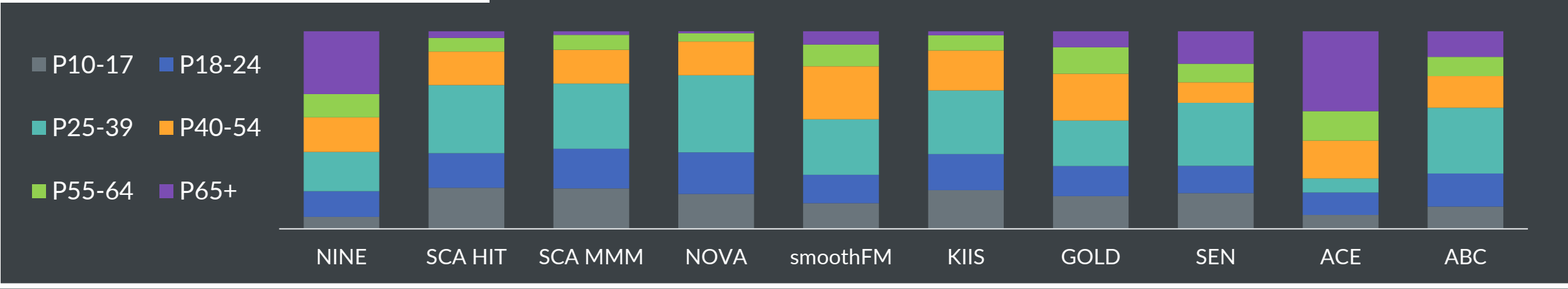
A critical step for commercial strategies



Streaming % of Listeners by Platform



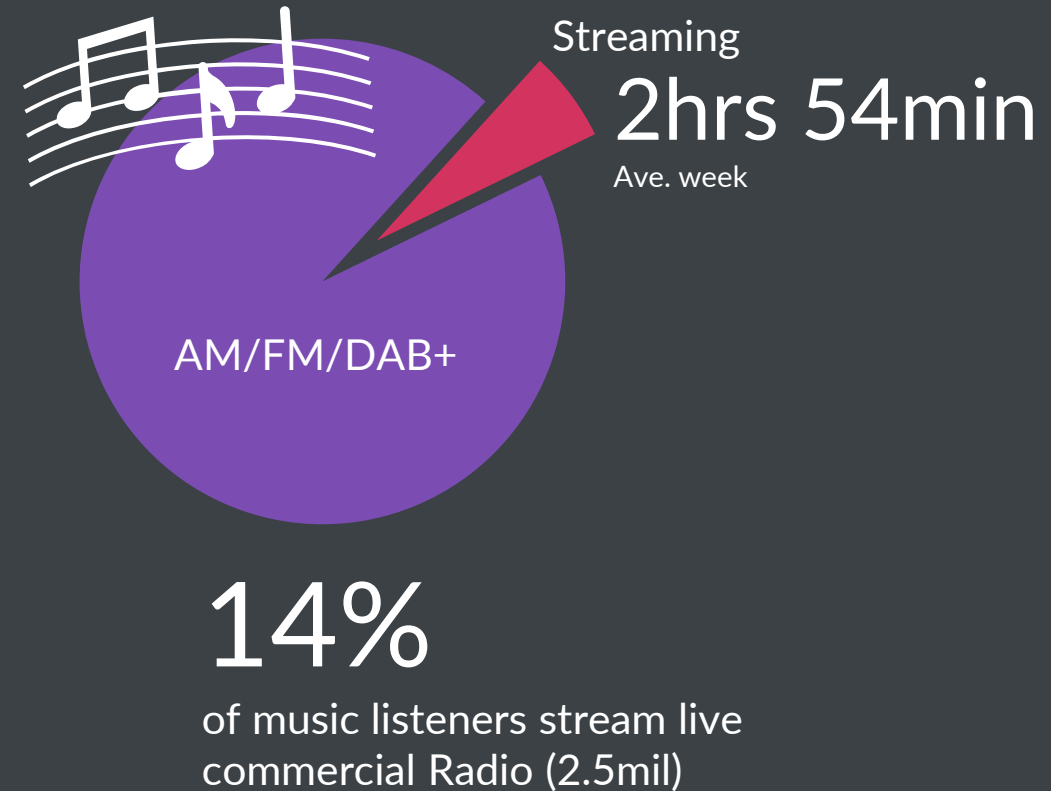
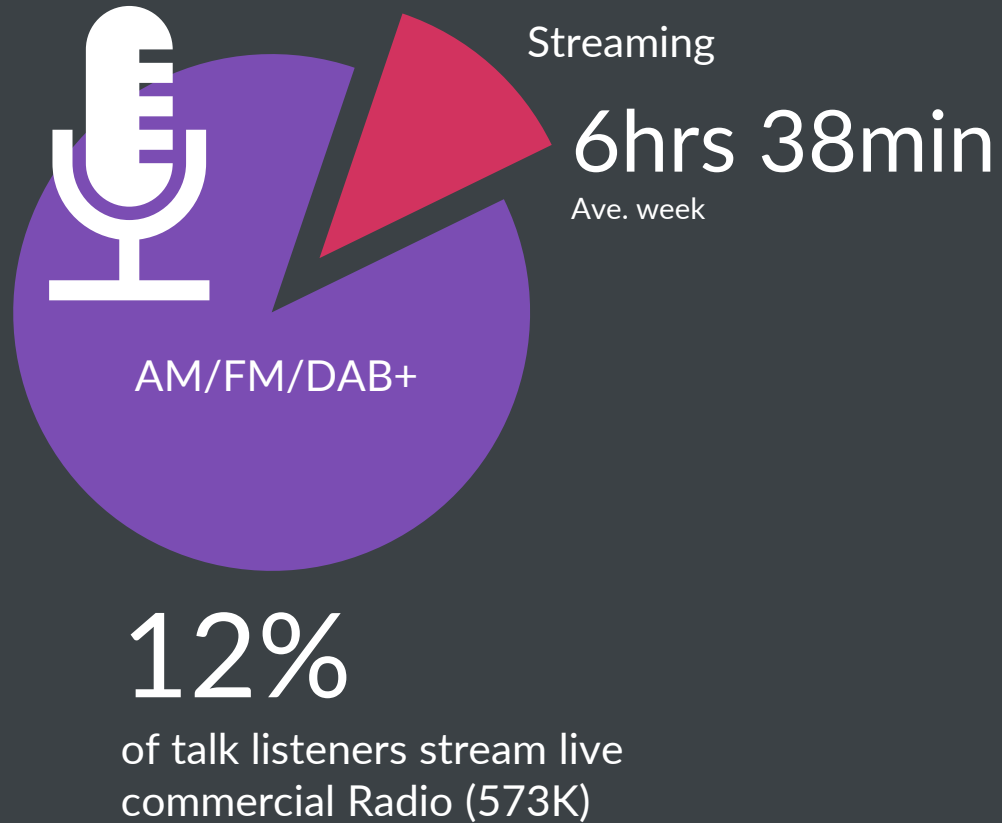
Profile of streaming listeners



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



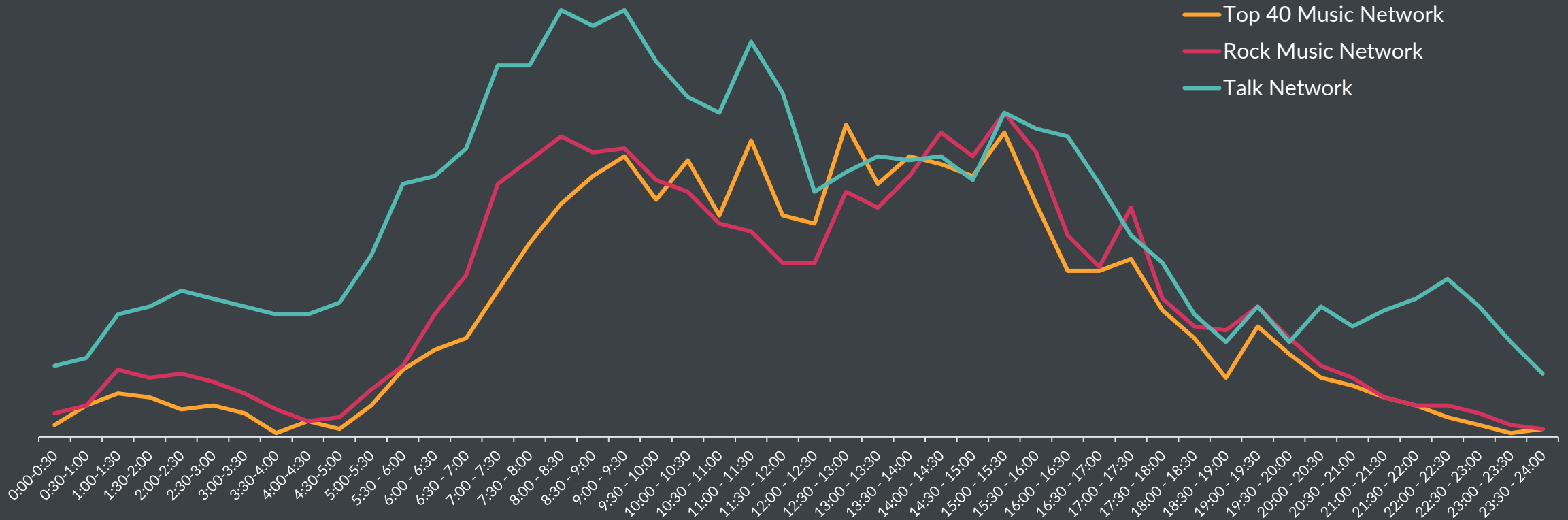
Source: GfK Radio Ratings, SMBAP S3-5 2023, P10+, Mon-Sun 12mn-12mn

Different formats, different shape of day

Audience sizes changes along with when they stream



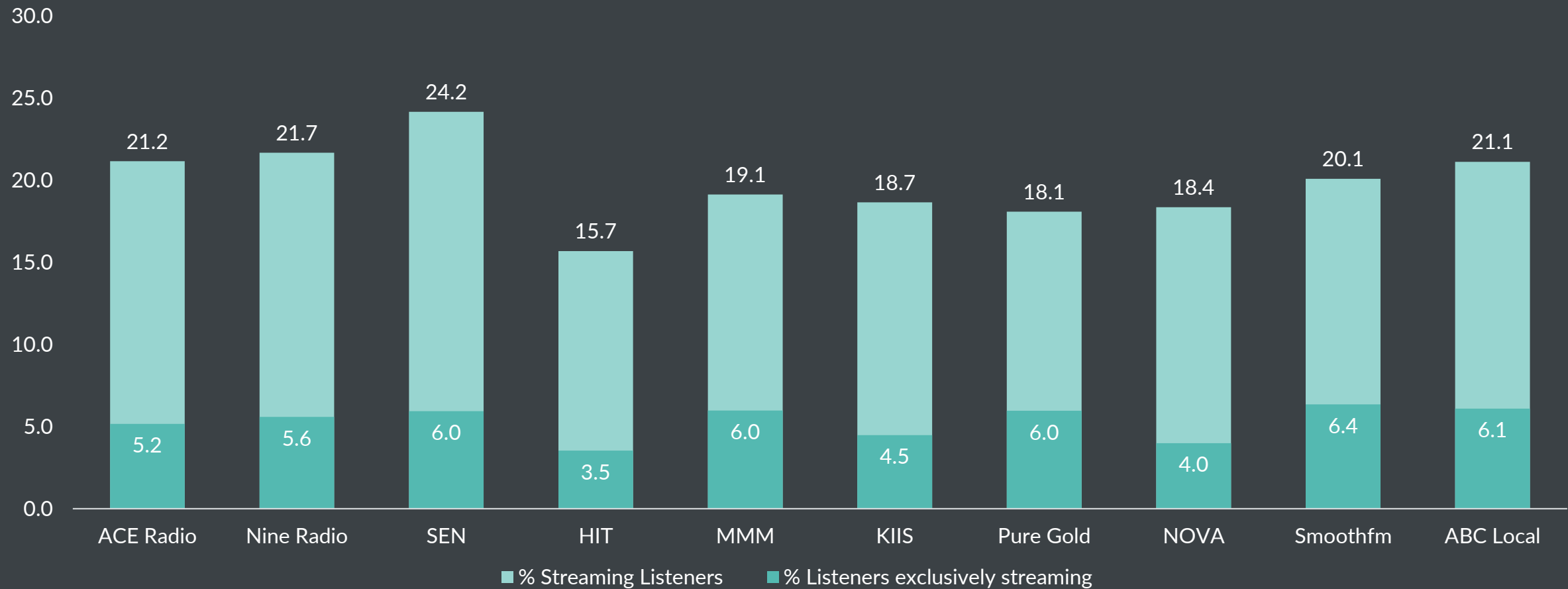
Streaming Shape of Day Mon-Fri



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

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

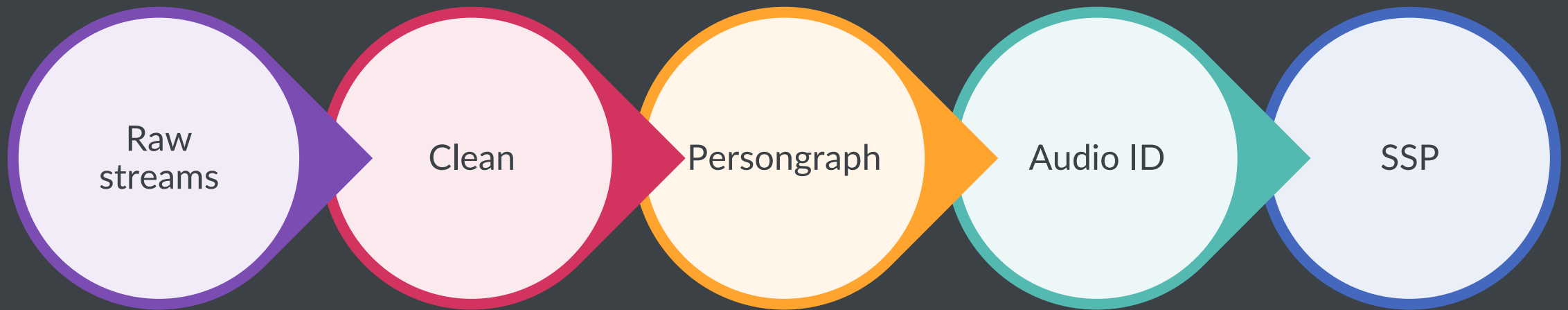
HOW CAN WE
EXPAND MODELLING
AND AUDIENCE
ATTRIBUTION FROM
RADIO 360

COMMERCIAL RADIO
STREAMING
COMMERCIALISATION
MODEL

...CONCEPTUALISATION
UNDERWAY

Unique ID Concept Flow

Using Radio360 as the base...



The Radio 360 journey

Moving on from Phase 1...



Radio 360 Phase 1:
live in Australian
market June 6

Radio 360 Phase 2:
Podcasts Insights drawn from
Radio 360

Radio 360 Phase 3:
integration of new
data sources

Full 360 view providing
wearable data to Australian
market

2023

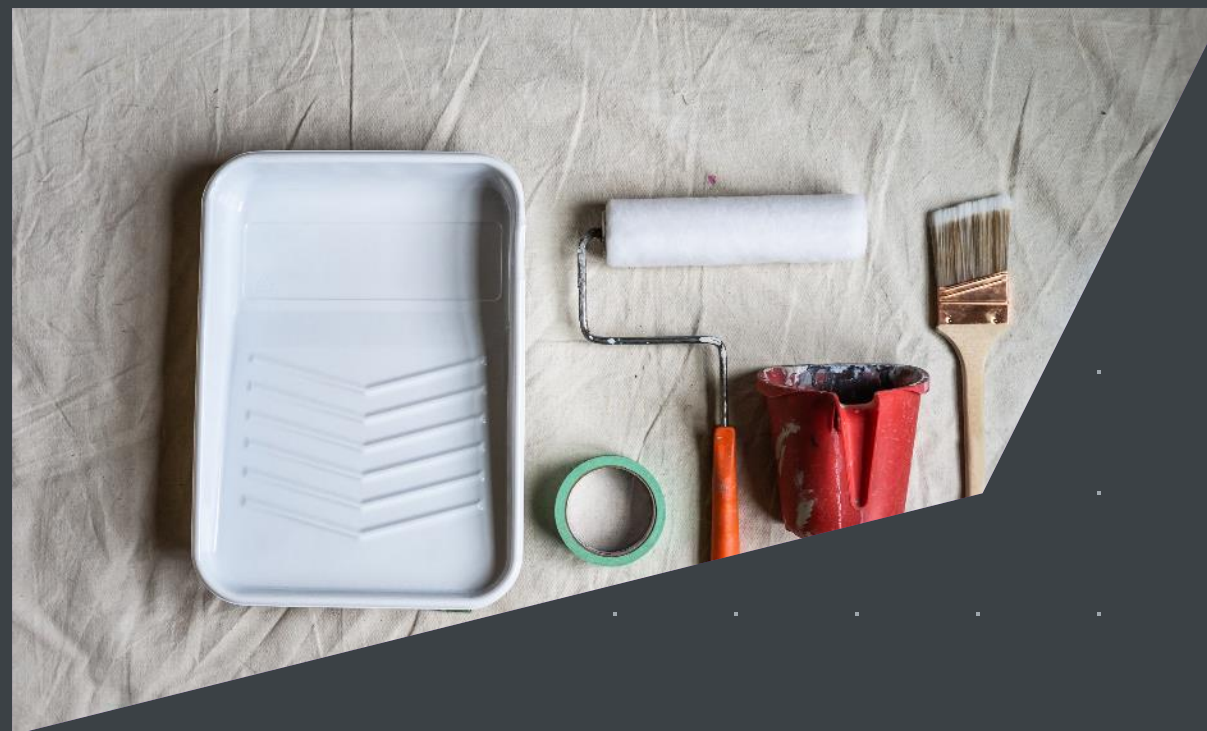
2024

2025

Work on integration of new data sources to provide deeper insights for any market...

- Radio 360 transferrable to any market
- Wearable meter inclusion
- Unique Identifiers
- Podcast inclusion
- Total Audio

5. Comparing the different measurement tools within Radio360



Advantages of our data sources and tools

All tools paint a different picture...together they can create a masterpiece



The Diary

- Lower cost depending on recruitment techniques (online, face to face, CATI)
- Provides detailed insight on listeners' daily radio consumption inc. station, place, device etc
- Captures all listening regardless of platform and headphone listening
- Widely used across the globe



Streaming Log Data/Sensic

- Provides near real-time data on radio listening, improving accuracy
- Large number of sampling points
- Variety of metrics available (views, engagement rates and impressions)
- Low cost to capture
- Sensic tag straight forward to apply



Wearable

- Passive measurement ensures lower loss of 'unaware' listening
- Provides near real-time data on radio listening
- Very deep and granular insights from the min x min level data
- Technologically more appropriate from advertisers' perspectives

Disadvantages of our data sources and tools

All tools paint a different picture...together they can create a masterpiece



Diary

- Data captured based on recall can result in missed listening
- Limited granularity of data (15mins vs 1/5/10mins levels) and average week vs actual
- Time between data capture and release can be lengthy
- Perceived old fashioned and not accurate
- Lower sampling points compared to wearable and census level data



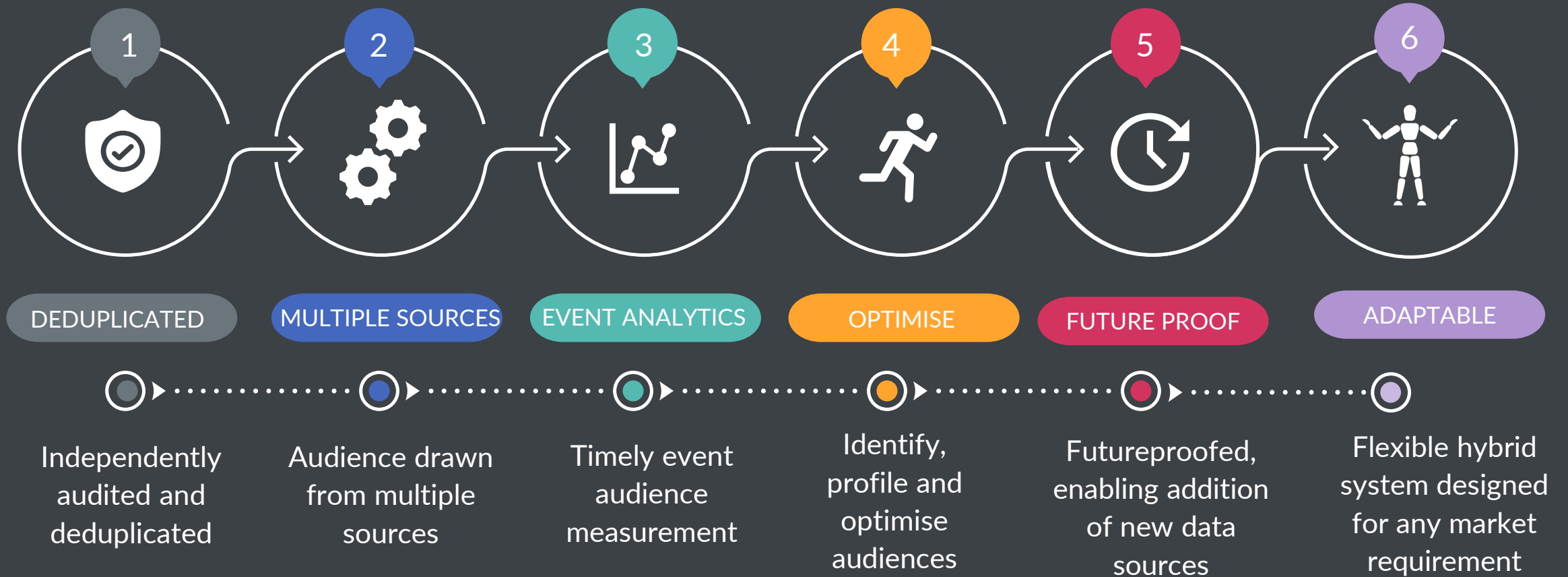
Streaming

- Without SSO is only session level and has no co-listening attributed
- Significant amount of cleaning require to ensure realistic data
- IP can be misleading in terms of ensure listener market attribution is correct
- Networks need to Sensic tag all controlled assets and ensure tag is static, some streaming access points cannot be tagged (third party providers like Tune In etc)



Wearable

- Expensive solution with hardware, panels, SSUs, incentives, recruitment etc.
- Does not capture all type of listening (e.g. headphone listening or when panelist is noncompliant)
- Requires high compliance from respondents
- Small cell sizes and can result in fluctuating data



Question and
discussion time

Thank you!

