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COMMERCIAL RADIO & AUDIO | **360°**  
**FACTS + Q&A'S**

# TAKE A 360° VIEW



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COMMERCIAL RADIO & AUDIO

**RADIO**  
**360°**



THE NEW HYBRID MEASUREMENT SYSTEM



## WHAT IS RADIO 360?

Since GfK began working with CRA almost 10 years ago, taking over from the previous supplier, it has been very apparent that radio continues to be a strong and resilient medium, with live Australian radio continuing to dominate across all methods of audio consumption.

It was also apparent that audience measurement for all media globally was evolving rapidly. The radio industry needed to explore and introduce a more advanced measurement system to demonstrate the strength and resilience of broadcast radio and the growth of streaming radio.

The Australian metropolitan radio ratings will undergo a major evolution in 2023 with a world-first hybrid measurement system being introduced to better measure listening everywhere on every platform.

RADIO 360 is the penultimate hybrid audience measurement solution designed by GfK for CRA following a five year long, multimillion dollar research project, the Measurement Innovation Program (MIP) where all available audience measurement tools were evaluated to determine the most innovative and comprehensive mix appropriate for the Australian market. The hybrid system will use data from multiple sources to create a comprehensive view of radio audiences.

The system brings together a representative sample of 50,000 respondents completing online and face to face surveys, live streaming data obtained from thousands of radio station web players, listening apps and server logs, and a panel of 2,000 respondents wearing the GfK MediaWatch, a wearable meter that automatically captures listening information when the wearer is in hearing range of a radio station.

Radio is an everywhere medium with people tuning in at home, at work, in the car and increasingly online via their smartphones and smart speakers. Across the five major metro markets about one in four Australians streamed live radio weekly in 2022 and this number is expected to continue to grow.

The new radio ratings will provide for the first time a single source of data on the size and behaviour of streaming vs broadcast audiences, giving advertisers granular information so they can optimise the effectiveness of their campaigns and helping broadcasters unlock the digital audio growth opportunity.

## **BENEFITS OF RADIO 360**

- **AUDIENCE DATA DRAWN FROM MULTIPLE SOURCES**

Radio has always been a unique medium in terms of its measurement due to the many different ways listeners can access their favourite stations and this is why the diary survey has been the most suitable measurement tool for many years. In fact it still remains the most widely used audience measurement tool for radio across the globe as it is an all-encompassing, efficient measurement tool across all means of listening, including headphones. However, in more recent years the home, car and the portable AM/FM radio has been expanded to include listening through internet capable devices and DAB+ radio. Having these multiple sources of listening meant that GfK was challenged to find a measurement system that is all inclusive, like the diary, but evolved the methodology beyond pen and paper. The goal over the past few years while investing in the Measurement Innovation Program was to find the most holistic way to capture all platforms of listening which didn't need to be one tool in isolation. This was catalyst for RADIO 360 – taking multiple data points to enrich the data as there is no one perfect solution.

RADIO 360 retains the consistency and robustness of the 50,000 currency surveys at the core of the ratings and by adding in real time data from multiple sources (i.e. GfK's Sensis tag, station server log data to capture streaming listening and the wearable panel data that will be used to deduplicate, profile and calibrate the streaming data), GfK has created a digitised, more industry relevant, robust and consistent total audience dataset for users to be able to interrogate both linear and digital audiences with confidence and reliability.

- **INTEGRATED LIVE STREAMING DATA FROM SOURCE NOT RECALL**

Live Australian radio station streaming audiences have always been captured within the GfK Radio Ratings and over time the industry has seen that these streaming audiences have grown, more than doubling in the past five years. The integration of the live streaming data enables the measurement system to tap into this growing audience, it provides additional credibility, consistency of audience levels and sample robustness by integrating this wealth of data available directly from the stations streaming assets.

- **IDENTIFY, PROFILE & OPTIMISE AUDIENCES**

Due to the robustness of the existing survey system and the integration of the streaming data users will now be able to see the radio audiences divided into AM/FM/DAB+ listeners and live streaming listeners for the first time within the currency data. We know from other research pieces, from the development of RADIO 360 and trended analysis of the existing GfK Radio Ratings that live Australian radio streaming audiences can be different to a traditional broadcast listener; they have different listening patterns and habits and they have different demographic, sociographic and buyergraphic traits. This new level of insight and understanding will start to change the way advertisers plan and buy their radio and digital audiences – the certified Gold Standard software platforms that are available to all radio ratings subscribers will provide deeper insights into these audiences and will also provide a new Reach and Frequency model which will enable the planning and buying of these audiences in a more targeted and efficient way.

- **TIMELY EVENT AUDIENCE MEASUREMENT**

The GfK wearable panel data will contribute to audience insights well beyond the streaming integration role. The panel will provide the ability for the industry to look at event measurement. In Australia we have operated a rolling weekly average survey schedule which has meant that our ratings have always provided results for an average week over a period of time. The wearable panel will now open the door to events insights, whether it be one off events like catastrophic weather events, sporting events or events that span periods of time like the Australian Summer period when the radio audiences are not traditionally surveyed, providing real audience insight into patterns and volume of listening which has never been available to the industry.

- **FUTUREPROOFED AUDIENCE MEASUREMENT SYSTEM ENABLING INGESTION OF NEW DATA SOURCES**

The GfK RADIO 360 model has been developed and designed with the future in mind. It is a long term data asset to provide the radio industry the opportunity to continue to build upon its audience measurement system through the integration of additional data sources to provide new and enhanced audience insights. These new data sources could be podcast audiences, audience targeting through unique identifiers, cross media usage or purchase behaviours – the very nature of a hybrid audience system is to be flexible to ensure the needs of the industry are met as new opportunities arise.

- **INDEPENDENT, AUDITED & DE-DUPLICATED CURRENCY**

The radio industry has, for many decades, provided the wider industry with an independent and audited currency which has ensured transparency and legitimacy to the radio audience estimates used in Australia. Now with the inclusion of live radio station streaming data across all participating networks RADIO 360 provides the industry with the first independent, audited and de-duplicated competitive dataset for streaming audiences within the radio ratings currency data. In recent times Commercial Radio Networks have used their own preferred digital measurement data, often from multiple sources, which has caused confusion and uncertainty among advertisers as they are trying to compare and find their best fit for their clients. Now within the ratings data users can compare stations and networks side by side using real streaming data to compare performance and plan with even more confidence.

## **RADIO 360 FAQ's**

### **WHAT WILL CHANGE WITH THE RATINGS WHEN RADIO 360 IS LAUNCHED?**

The publicly released GfK Metro Radio Survey Summary Reports will continue to provide the Total Radio level data currently available; Share%, Average Audience, Cumulative Audience and the DAB+ Station results. From Survey 3 2023 the Summary Report will be expanded to include the streaming audience data for each AM and FM radio station listed in the survey; also included within the streaming result summary table will be the streaming audiences for three aggregated DAB+ station groups; total DAB+ stations, commercial DAB+ stations and ABC DAB+ stations.

Subscribers to the data will be able to see broadcast (AM/FM/DAB+) and streaming audience data through their chosen Gold Standard accredited radio analysis software against all stations. Users will be able to analyse the stations' broadcast audiences and their streaming audiences in the same way they are able to analyse total audience figures currently. The metrics that will be available will be the same, including cumulative audiences, share, time spent listening and demographics.

### **HOW WILL THE STREAMING DATA BE CAPTURED?**

Information about streaming audiences is currently included in the radio surveys based on listener recall via the online and face to face surveys. Under RADIO 360, streaming data will be obtained directly from source via the daily collection of station server logs and the use of the GfK Sentic Tag across 3,000 radio station stream sources such as websites and listening apps.

The technology captures when a radio stream starts and stops. The data is integrated into the system and will provide insights that have not been available before such as the age and profile of streaming audiences, radio's weekly reach via streaming, when and where people are streaming radio and lifestyle information.

### **WILL THIS CHANGE THE WAY NETWORKS SELL BROADCAST AND DIGITAL ASSETS?**

That is a decision for each network. According to the IAB Australian Audio State of the Nation report 71% of media agencies intend to increase expenditure in streaming audio in 2023. The addition of a validated, consistent and comparable streaming dataset will provide clarity on digital audiences and provide networks with the option to sell different audience profiles depending on a client's needs.

### **HOW DOES THE GFK MEDIAWATCH WORK?**

The MediaWatch is probably the most visible and exciting change to the total measurement system in Australia. The watch is a functional time piece and step counter AND it captures ambient sound at the same time.

Panels of 400 consumers in each of the metro markets of Sydney, Melbourne, Adelaide, Brisbane and Perth wear the GfK MediaWatch to collect data on their radio listening during their waking hours.

The watches are also equipped with heat and motion sensors to confirm the watch is being worn. The user docks the watch at the end of each day to recharge and download the days' listening to GfK. Sound grabs are encrypted so they cannot be heard by the human ear and everyone's privacy remains intact.

A sound matching algorithm then matches the audio from the panelist to audio from all the participating radio stations in each market that are captured in parallel using massive sound sampling units. The data is used to calibrate and ensure accurate, deduplicated streaming data.

The GfK MediaWatch panel use will expand beyond the calibration and validation of the streaming data. It can be used as a base to integrate additional data sets where applicable, the addition of podcast behaviour or consumer data for example, and having the ability to tap into a panel for additional insights is an invaluable asset to the industry.

## **SO WHY DON'T WE JUST USE THE WATCH?**

This is a valid question, because this is done in TV and electronic measurement is often considered the most evolved. Radio has always been a very different medium to TV to measure – TV has traditionally been a household meter system where the meter is attached to the TV, is stationary, and the task is relatively straightforward for participants.

Radio on the other hand is no longer a bulky device residing in someone's 'good front room' and does not lend itself to meter measurement like TV because of its portability and myriad of listening options. Also, a wearable meter does capture a lot of the listening but still doesn't capture it all – headphone listening for example. And the simple impact of user compliance could result in lost listening which the industry has always been mindful of. A hybrid measurement system is the optimal solution to continue to capture all listening across all devices and all platforms.

## **WILL ANY WATCH DATA BE MADE AVAILABLE?**

In the future, GfK will be able to use the wearable data to provide insights into radio audience behaviour on a more granular basis. For instance, to provide listening data over the summer period, which is currently not surveyed, or to measure listening patterns related to large scale and significant news events.

The event measurement information will be made available post the official launch of RADIO 360.

## **WHAT ABOUT MORE COMPLICATED LISTENING MOMENTS, FOR EXAMPLE IF A PERSON IS WEARING A WATCH AND RADIO IS PLAYING WHERE THEY WORK, BUT THEY ARE LISTENING TO SOMETHING ELSE VIA HEADPHONES, WHAT WOULD BE CAPTURED? IS THIS LISTENING DATA NOT USED? HOW DOES THIS WORK?**

The design and purpose of any wearable meter like the GfK MediaWatch is to capture the sound it is exposed to and in most instances, this would also be the sound the panelist is exposed to. Measurement from a passive device is called opportunity to hear vs the recall information from the surveys which is a measure of awareness of listening. The question regarding headphone listening highlights this; the meter would collect the ambient sound, not the headphone listening and as such the listening could either be misattributed or missed altogether. Reasons like this is why a 100% electronic measurement system is not being adopted for radio measurement in Australia as it does not provide the opportunity to capture all listening; a hybrid system is designed to do this.

## **WILL THE ONLINE AND FACE TO FACE SURVEYS BE PHASED OUT?**

No, the surveys remain an effective and important part of the hybrid system to ensure all listening is captured. The radio diary does remain at the forefront of audience measurement globally, with TV and radio markets around the world (the US, UK, and many markets within Europe and Asia Pacific) continuing to use the diary as an effective tool to provide consistent and robust ratings data for their markets. In Australia, 80% of the surveys are completed online and 20% face to face. Wearable meters cannot replace surveys as they do not capture headphone listening and can miss listening time if the user forgets to wear or recharge the watch.

Insights from GfK's Measurement Innovation Program (MIP) clearly demonstrated that there is no one perfect audience measurement tool. RADIO 360 uses a hybrid methodology to account for all types of audience measurement techniques and data sources – the diary (face to face and online) because it is still a very solid tool to capture listening behaviour, streaming data from the radio stations and GfK's Sentic tagging system to provide data direct from the source, and the wearable watch meter for calibration and additional granularity.

Over the years GfK and CRA have undertaken many pilots with the view to replace or update the diary, each test clearly proving the effectiveness and validity of the data extracted from the diary. Pilots for each device (wearable meters, app meters, streaming data etc) provided various KPI levels that while similar in nature demonstrated that not one tool is the perfect solution, but rather a combination. The one key variable that has provided reassurances is that the top 5 and top 10 radio stations are consistent across each survey, as well as in the other measurement tools.

## **WILL SOURCING OF GfK RATINGS DATA NEED TO CHANGE?**

Data published prior to Survey 3 2023 will continue to be referred to as "GfK Radio Ratings" in its sourcing. From Survey 3 this will change to "GfK Radio360 Ratings". All other guidelines around sourcing the radio ratings remain and can be found here: [Accessing & Sourcing the Radio Ratings](#)

## **THE FIRST RELEASE HAS BEEN CALLED PHASE 1 OF RADIO 360. WHAT WILL THE NEXT PHASE LOOK LIKE?**

RADIO 360 is built for the future and available data sets continually evolve. The industry needed the ability to adapt the measurement system to ensure it remains relevant and continues to provide resilience and unlimited potential. Once the system is in place, future development could include event measurement and insights using the wearable panel, addressable audience capabilities, the measurement and integration of podcast listening and connectivity to other data such as purchase behaviour.

One of the core features of this new system is the digitisation of the measurement data and the establishment of the wearable panel; Phase 2 will explore ways to measure and report other radio assets, with podcast measurement being pivotal. Initially we will concentrate on providing regular insights into the behaviour of podcast listeners – consumption, duration, instances and genre listened to. GfK will also undertake some podcast pilots to look at the potential for integration into the currency measurement tool.

## **WHY DID WE NEVER SPLIT AUDIENCES HISTORICALLY EACH SURVEY WITH DEVICE DATA IF IT WAS ALWAYS THERE?**

Insights into the streaming audiences from within the previous methodology have been analysed and tracked internally by CRA and GfK for many years and some insights have been made at a total level to market. However, as it has traditionally been a small subset of the overall survey sample base and did experience large fluctuations at an individual station level, it was not a robust enough for full release.

Like the process CRA undertook with the individual DAB+ radio stations; when the sample sitting behind the results was large and consistent enough the data was released to users. While the sample size within the surveys has not changed the audience data being derived from the richness of direct from source information for streaming means the sample size is no longer a concern.

## **WILL WE SEE STREAMING DATA BY DEVICE – IF NOT WHEN?**

This will be under constant review by the CRA Research Committee as we progress. Currently, the device data is captured in the face to face & online surveys and sample size is low when applied to streaming data only. Further investigation into the data available in streaming data as well as other data being collected will be considered as RADIO 360 evolves to determine the most accurate and robust method to achieve this.

## **WILL THE RADIO NETWORKS INCLUDE ANY DIGITAL AUDIENCES IN THEIR R&F RUNS?**

That is a decision that will be made and communicated by each Network. Using the Gold Standard software the choice can be made about which audience base to create insights and R&F schedules against.

## **IF I WANT TO EXCLUDE ALL DIGITAL AUDIENCES FROM MY SPOT BUY CAN I DO THAT?**

The Gold Standard software and the R&F engines within have been designed to enable users to create a schedule against Total Radio audiences or AM/FM/DAB+ audiences or Streaming audiences.

## **WILL GFK/ERAM ENABLE ME TO DELIVER A R&F ON A DIGITAL ONLY BUY? IF NOT, WHAT CURRENCY WILL YOU USING TO PLAN AND BUY DIGITAL ONLY AUDIENCES?**

The Gold Standard software platforms (eRAM, Probe etc) and their R&F engines have been designed to enable users to create a schedule against Total Radio audiences or AM/FM/DAB+ audiences or Streaming audiences. The way each Network will sell their digital audiences will be a decision made and communicated by each Network.

## **WILL THIS CHANGE TOTAL LISTENING?**

Total listening levels will remain consistent as all radio listening, including listening via internet capable devices, has always been captured in the GfK Ratings.

## **WILL WE BE ABLE TO ACCESS THE DIGITAL DATA DYNAMICALLY (OR ONGOING).**

The GfK Radio Ratings data will continue to be provided based on eight survey releases per year. At this stage RADIO 360 will not provide any additional digital data to market.



## **HOW WILL I ACCESS THE DATA?**

Access to RADIO 360 will be made available through your certified Gold Standard software platform. Please refer to your software supplier for more information on how their software package will provide access.

## **CAN I RUN POST CAMPAIGN?**

If you know when the spots aired, you will be able to run a post analysis on either Total Radio, AM/FM/DAB+ or Streaming audiences in the same way you have been able to run Post Campaigns on Total Radio previously. Users may plan on Survey 3 and then run the post analysis against the relevant survey for the aired campaign, that may be Survey 4 onwards.

## **WILL I BE ABLE TO DO YEAR ON YEAR R&F RUNS ON STREAMING AUDIENCES?**

RADIO 360 data will commence from Survey 3 2023, there will be no historical or back data provided as the RADIO 360 system and modelling was not occurring over a year ago in a live system. Year on Year comparisons will be able to be made from Survey 3 2024.

## **HOW ARE TAGS MANAGED AGAINST STREAMING DEVICES AND APPS MONITORED? IS THERE A WARNING TRIGGERED TO GfK IF A DATA SET IS MISSING FROM CERTAIN APPS AND STREAMING DEVICES?**

Extensive daily and weekly quality control checks for volume and activity are built into the RADIO 360 production system so GfK can identify when there has been a drop in volume or any issues with data supply.

## **WITH REAL TIME DATA, WILL THE TRADITIONAL 15MIN AVERAGE LISTENING REMAIN? OR SHORTEN?**

At this point in time, to ensure consistency with the core currency, all listening instances will be based on an average 15min block regardless of data source.

## **WITH THE “EVENT” MEASUREMENT WILL IT BE POSSIBLE FOR STATIONS TO LOOK AT SMALLER EVENTS (RATHER THAN QUEEN’S DEATH) SUCH AS A MAJOR CONTEST WINNER ANNOUNCEMENT OR MAJOR STUNT TO SEE WHAT EFFECT THAT HAS IN THEIR MARKET?**

The wearable panel data will provide the opportunity to view smaller events, access to this level of data on a regular basis to the radio networks is still being discussed as an option in the future for subsequent stages of RADIO 360.

## **IN TERMS OF THE STREAMING DATA – WE KNOW THAT PEOPLE IN PERTH FOR EXAMPLE STREAM RADIO IN OTHER MARKETS. WILL STREAMING DATA REFLECT ALL LISTENERS, OR BE BROKEN OUT BY MARKET AS WELL AS BY STATION?**

GfK metro surveys are based on ‘in market’ listening which includes state-based streaming data. Geo-targeting removes interstate or overseas listeners for each metro station included in the survey. The vast majority of streaming listening for metro stations takes place within the defined survey area. Diary data continues to determine audience listening and the number of listeners. streaming data does not increase the listening or listener base, but does determine the size of the streaming audience inside that base.

## **HOW OFTEN ARE PEOPLE REQUIRED TO COMPLETE THE ONLINE DIARIES AS OPPOSED TO PAPER DIARIES - DAILY, WEEKLY?**

The GfK online ed diary completion works in the same way as the paper diary, the respondent is asked to complete the diary each day as they proceed through their allocated surveyed week.

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