

Radio

Stéphanie Piret
President
Technical Committee Radio



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Stéphanie Piret, Voorzitter

Omnicom Media Group

Gaetan Doucy

GroupM Belgium

Pierre Portugaels

RTBF

Jo Snoeckx

DPG Media

Stefan Delaeter

VAR

Marco Marini

IP Belgium

Isabel Sanchez Garcia

MMS Communications Belgium

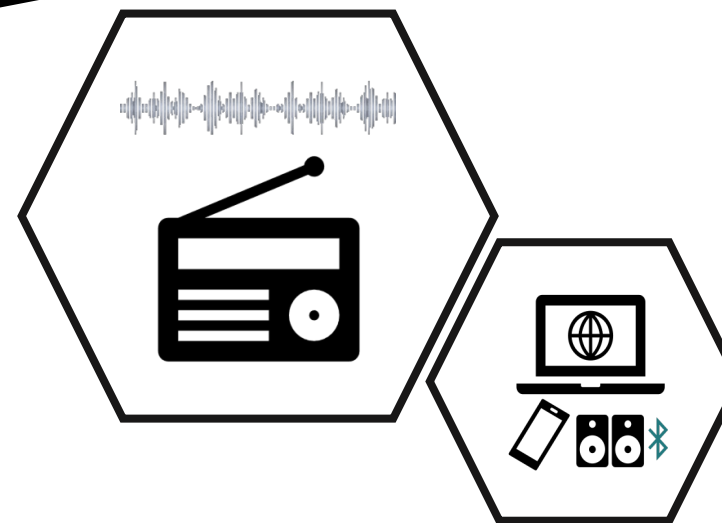
Ferre Vandervreken

VRT



Continuity & digitalization of audio measurement ~~in COVID times~~

THE SEQUEL - EPISODE 3



This year main priority : still CONTINUITY

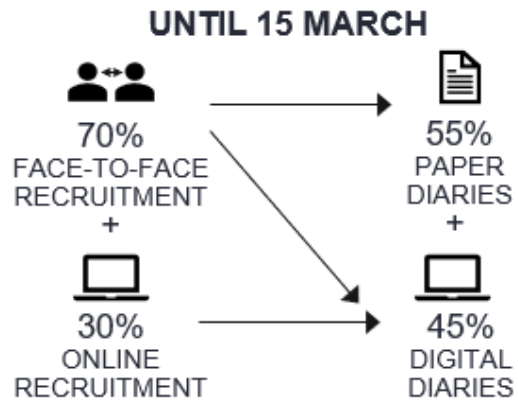


MAXIMIZING THE RETURN ON RECRUITMENT EFFORTS

A partial panelization
of CIM RAM

In the 2 previous episodes, we focussed on **the mix** of recruitment methods...

FROM A (MOSTLY) FACE-FACE
AND PAPER DIARY SURVEY

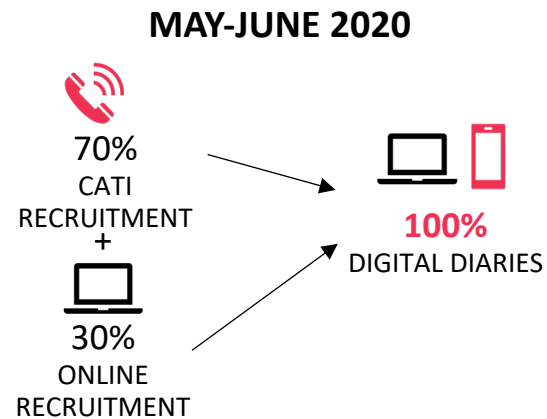


Continuous method from 2018



Impossible in Covid period

... VIA A (MOSTLY)
CATI/ONLINE SURVEY

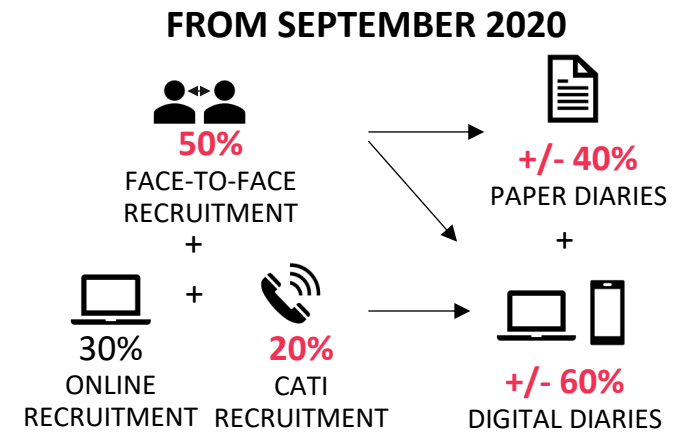


Possible in lockdown



Participation of young people
and lower social groups

...TO A "MULTICHANNELS"
SURVEY



Best compromise wrt
representativity



Slow down of fieldwork
during strict lockdown
(eg wave sept 20 - feb 21)

This year, the focus moved to
the **return on the recruitment effort**

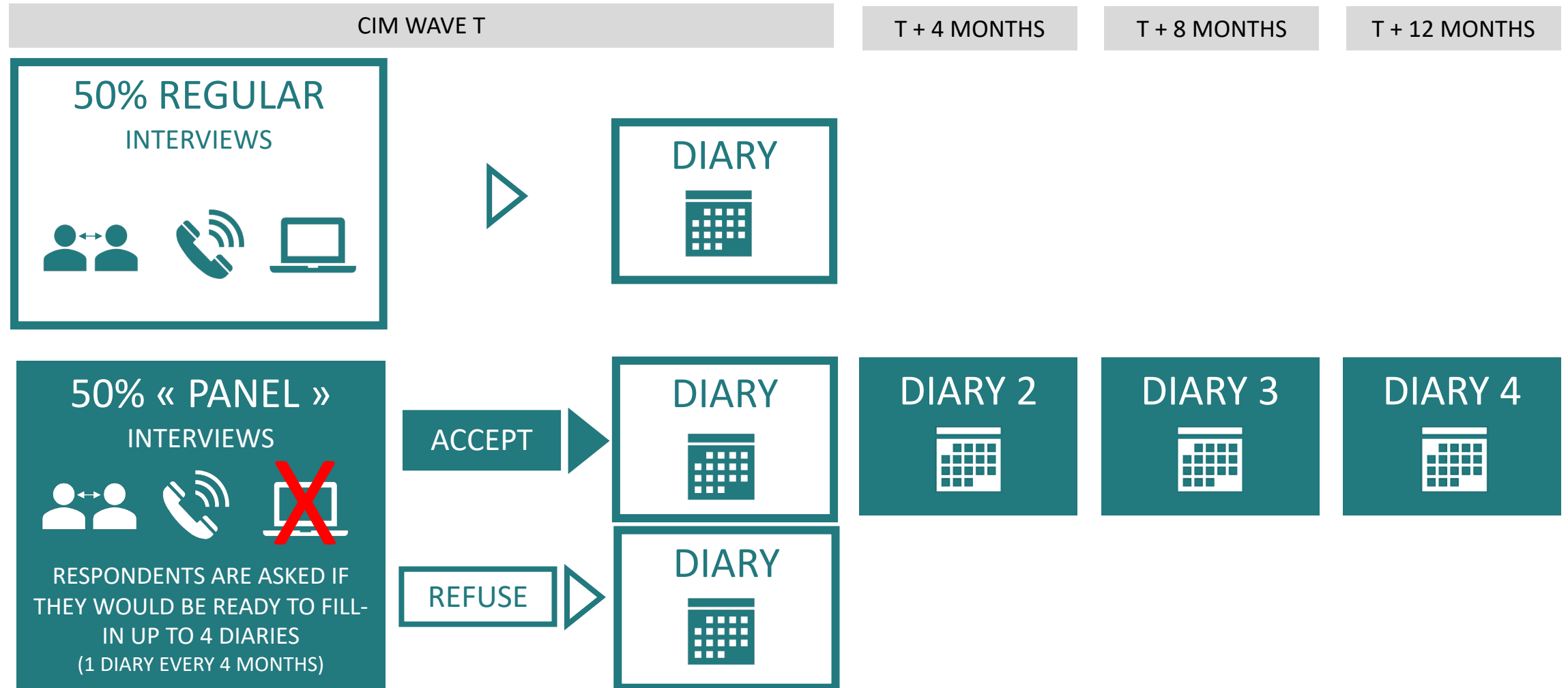
Can we keep people longer by introducing panelization?



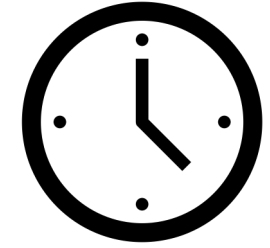
?



Partial panelization : the process



We have now completed a full cycle



WITH SOME ADJUSTMENTS ALONG THE WAY :

STOP PANELIZING THE PANEL :
NO MORE CAWI RECRUITEES IN PANEL
(JAN 22)

STOP 2 PARTICIPATIONS IN 1 WAVE :
SWITCH TOWARDS 1 DIARY EVERY 4
MONTHS INSTEAD OF 3
(MAY 22)

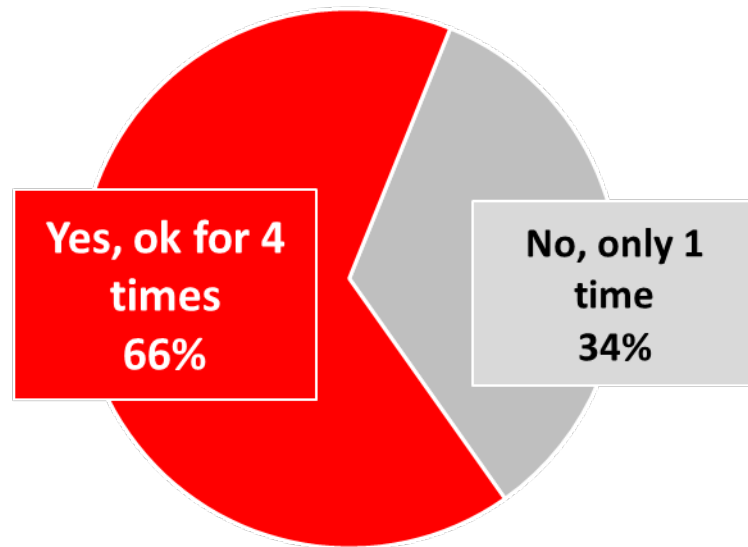
IMPROVEMENT IN COMMUNICATION :
PANEL BROCHURES, ANNOUCEMENT
E-MAIL & CARDS, PERSONNALIZED
REMINDERS ...

Bilan so far : **Yes, people comply...**

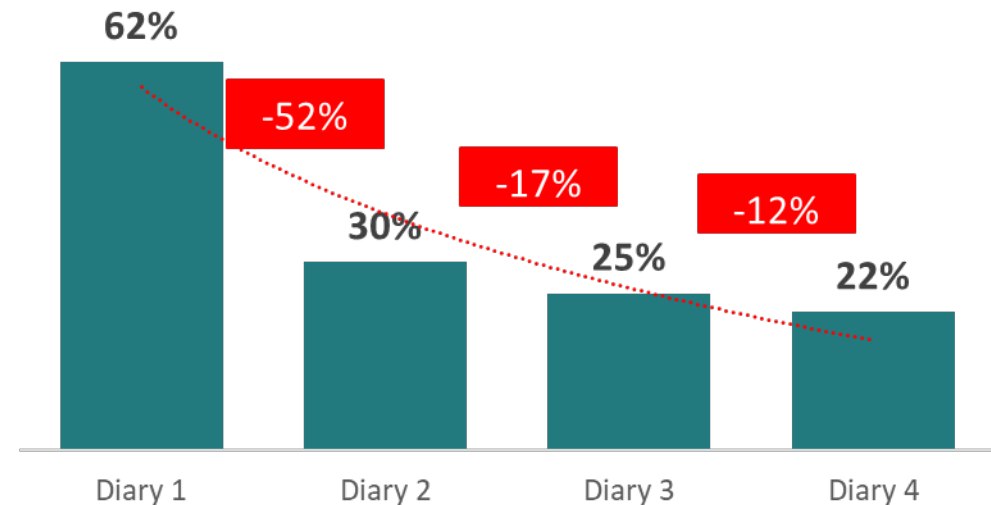
No issue with the panel proposition :
+/- 2/3 of panelists agree to send 4 diaries

Quite satisfying results wrt compliance :
1 out of 5 actually send back 4 diaries

People in panel who accepted to send back diaries
(wave May-Aug 22)



Panel Members - Return Rate
(01/07/2021-18/09/2022)



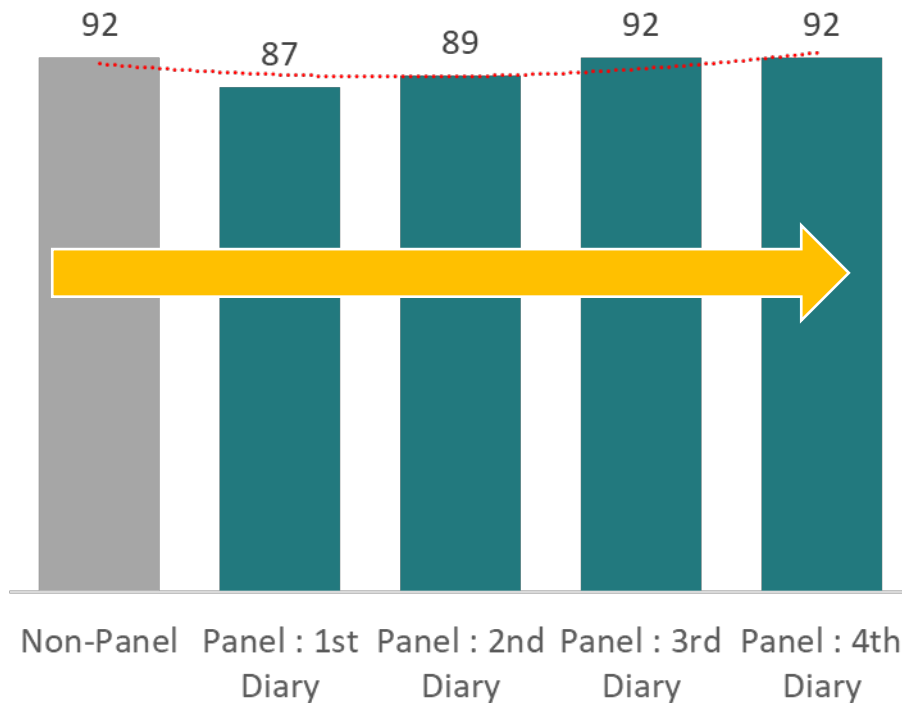
12% of the sample of May-August 2022 =
reparticipation diaries (+/- 18% of the diaries)

Do we get mostly heavy listeners?

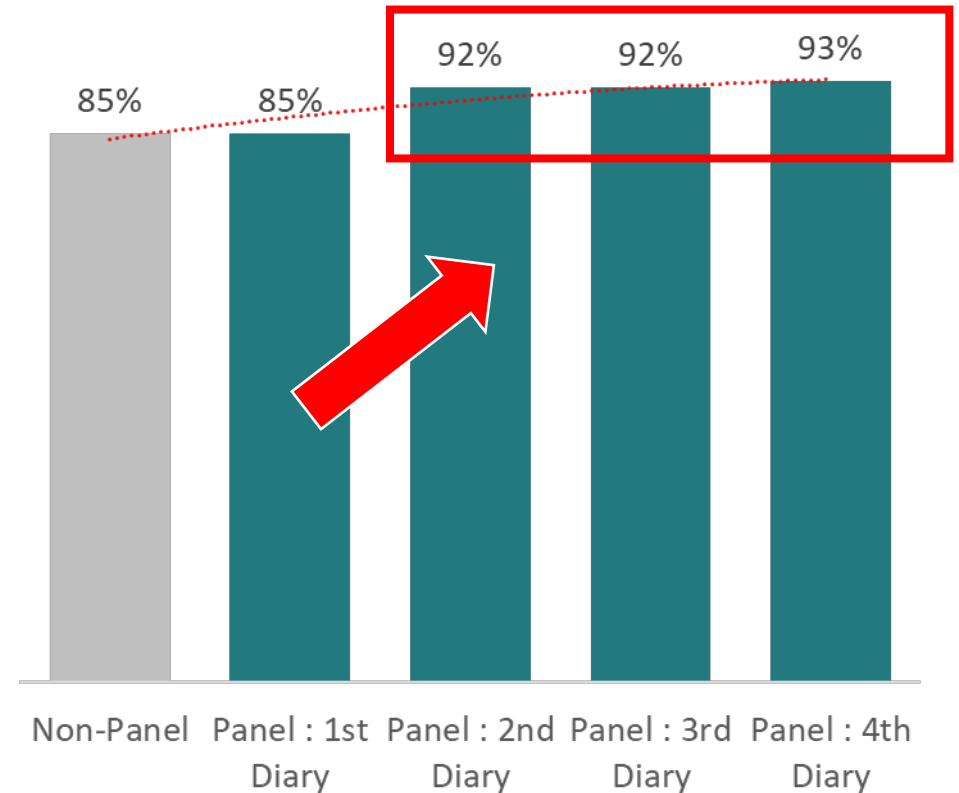
No! However, non-listeners are tough to get...



Average #Quarters per Listener
(WITHOUT NON-LISTENERS)

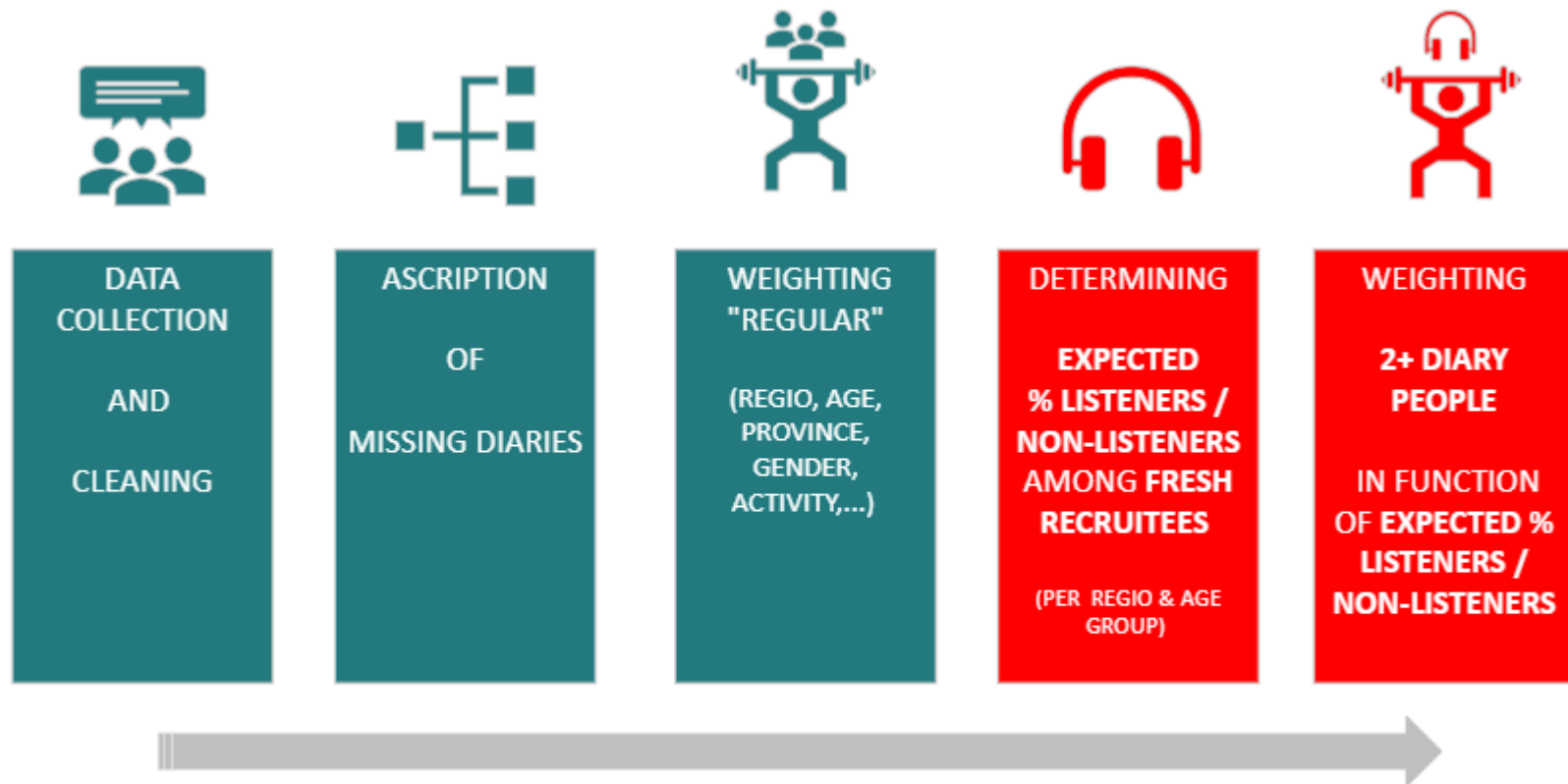


% Listeners



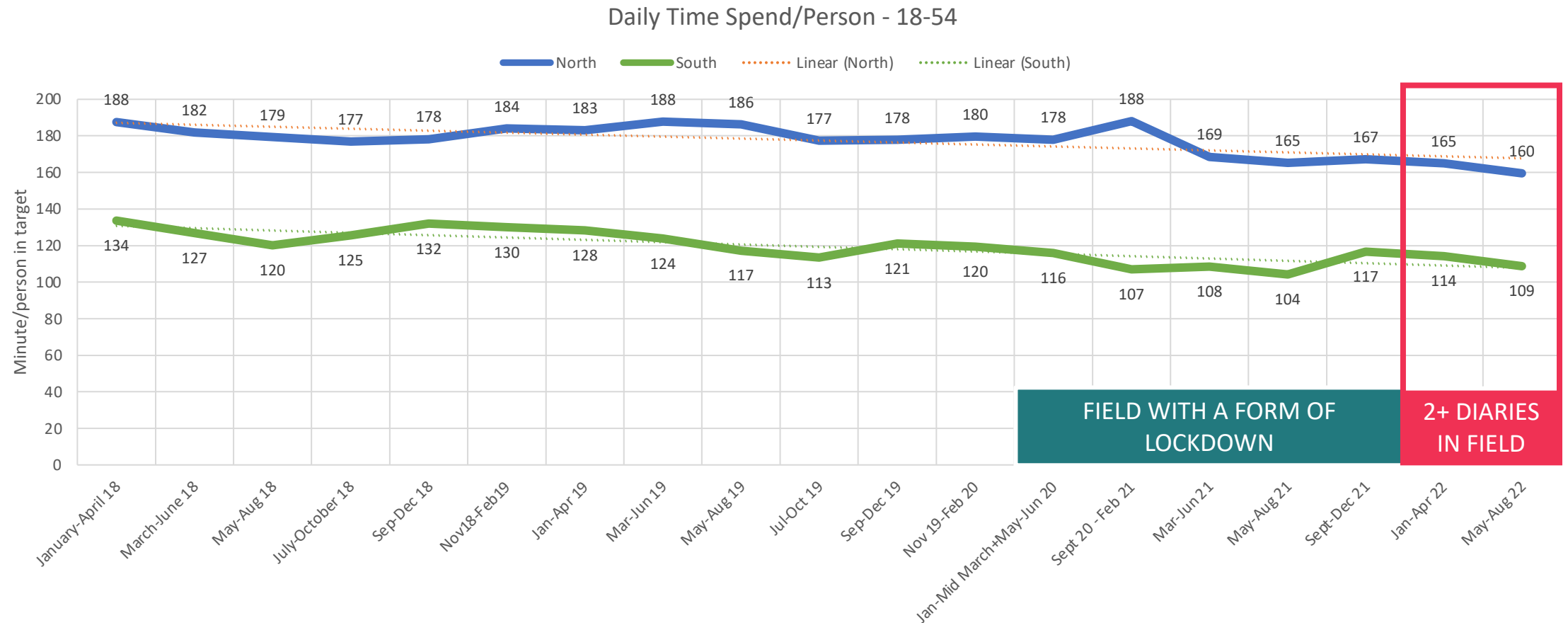
(Base = 01/07/2021 –09/10/2022 ; received diaries only)

Solution : using our « fresh respondents » to adjust the proportion of listeners vs non-listeners

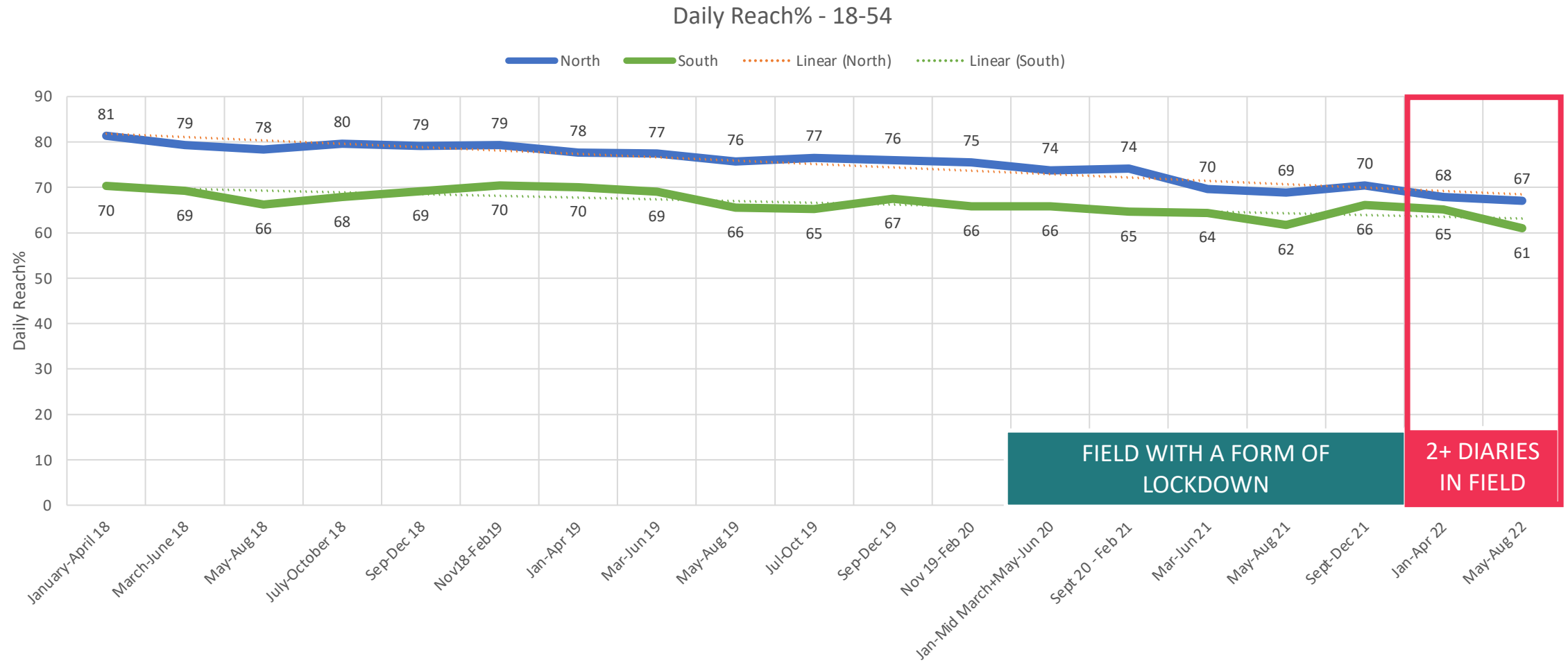


Fresh respondents = 88% of respondents at the moment

Results: no unexpected increase of time spent



...nor unexpected increase of daily reach%



What's next for RAM?

... still a high focus on continuity!

Integration of **MediaWatch** panel
respondents in CIM RAM



Who? A CIM panel of
5 500 potential interviewees

Target? getting 10% of CIM RAM
sample from MW
(+/- 800 interviews/wave).
What? 1X radio questionnaire

From wave September-
December 2022 already

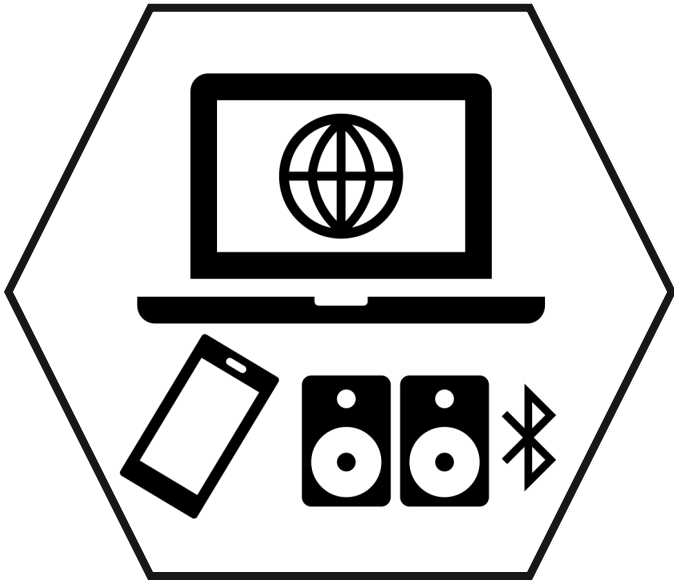
Refining **ascription** process with **PMM**



**Injecting more of the
collected information** in
the process to **predict
volumes more accurately**

From wave September-
December 2022

And for our 2nd pillar DIGITALIZATION?



BROADEN THE DIGITAL AUDIO MEASUREMENT

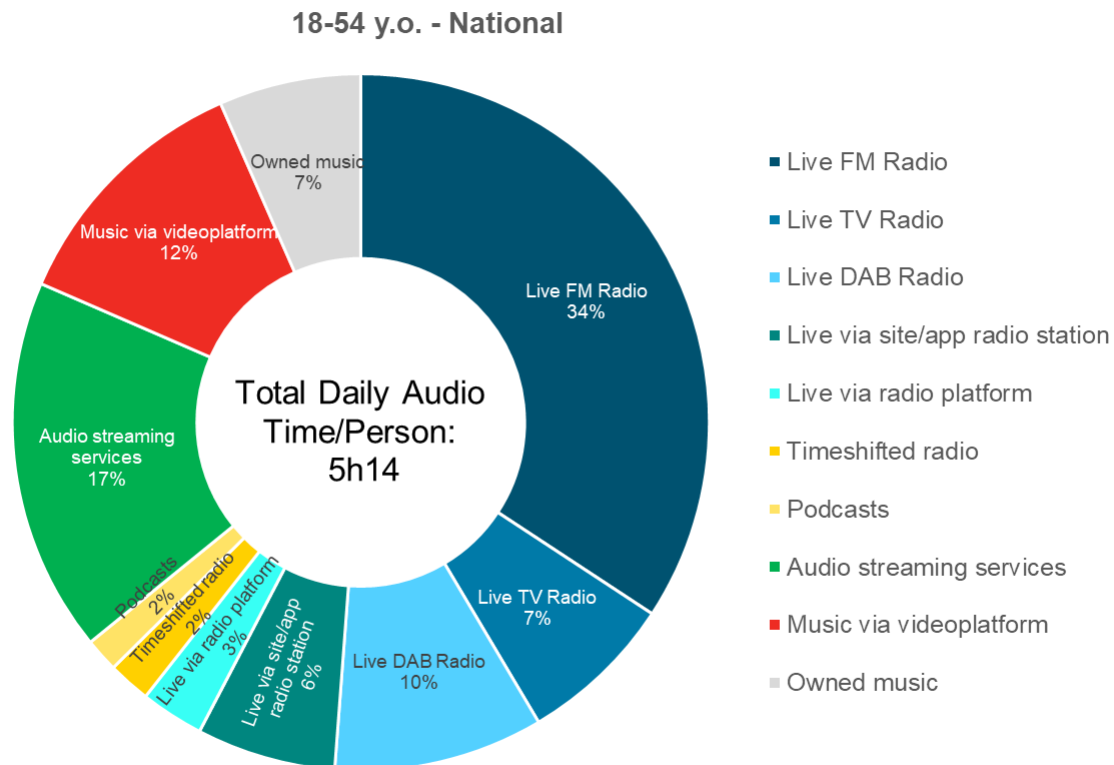
An encore for
CIM AUDIO TIME

CIM RADIO
STREAM
MONITOR in
PODCAST

CIM Audio Time will come back in 2023!

CIM AUDIO TIME 2022

A 1st CIM view on the full audio landscape!



CIM AUDIO TIME 2023

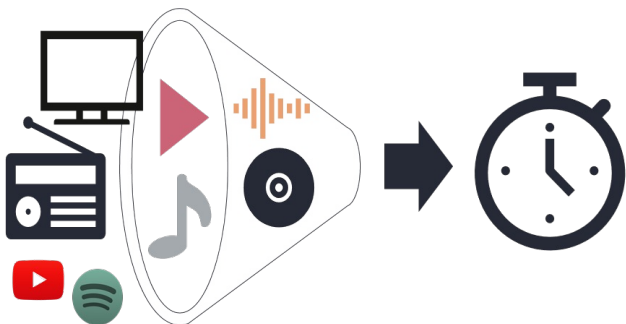
1st evolutions are coming soon!



Quick reminder of the CAT principles

Main objectives:

- ✓ GETTING A **CIM** VIEW ON THE **TOTAL AUDIO LANDSCAPE**
- ✓ WITH A MORE ACCURATE MEASUREMENT OF **LISTENING DURATIONS**
- ✓ **WITHOUT THE AMBITION OF BEING A CURRENCY** FOR AUDIO BUYING; CIM RAM STAYS THE REFERENCE FOR RADIO



In practice:



Data collection : October-December
Idem 1st edition



Interview on listening habits
+ a listening **diary** of 1 day.
All main audio devices & contents, including
audio brands
Idem 1st edition



Ref. universe: 12-74 living in Belgium

Sample: 4 000 interviews

New 2023: 57% CAWI + **43% panel MediaWatch**
(1st edition = 100% CAWI)

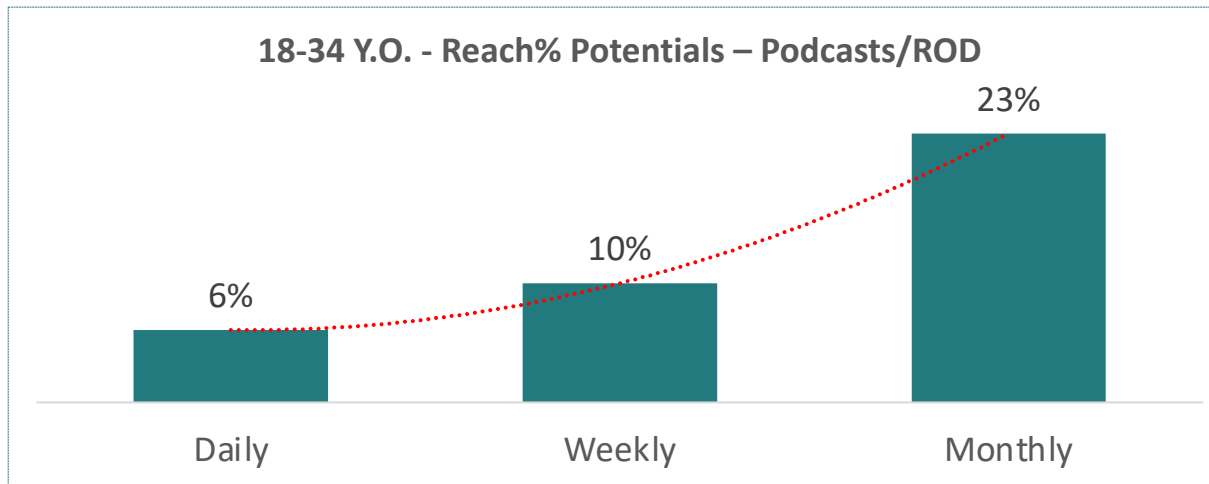
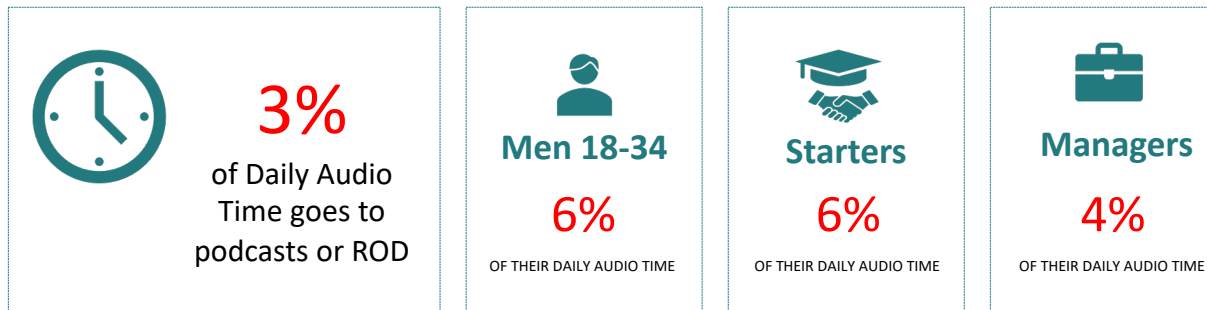


Status? Ongoing field. Release begin 2023

CIM Radio Stream Monitor will podcast in 2023

Thanks CIM Audio Time, we've learned that :

However we do not know yet:

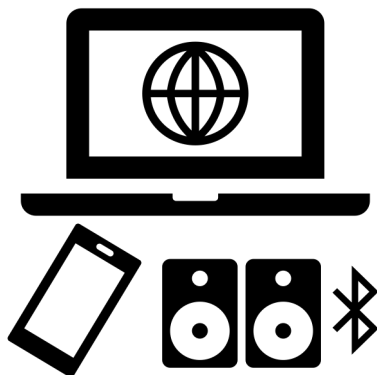


Radio Stream Monitor

Quick reminder of the **RSM principles**

Main objectives:

- ✓ **GETTING A CIM VIEW ON THE TOTAL AUDIO LANDSCAPE**
- ✓ **WITH A MORE ACCURATE MEASUREMENT OF OVER-IP LISTENING FOR SUBSCRIBERS**
- ✓ **WITHOUT THE AMBITION OF BEING A CURRENCY FOR AUDIO BUYING**



In practice:



Continuous process with daily release
(5 days delay)
In principle idem for AOD & podcast



Server side measurement

1. **Collecting logfiles** : from servers of each participants
2. **Data processing** : cleaning, bridging & enrichment
3. **Data release** : volume metrics in interactive dashboards. Likely to be more limited for podcast and ROD (only downloads vs active sessions & time metrics on some platforms)



Status? Resolving the last technical difficulties.
Likely release during 1st semester 2023

In a nutshell...

THE BIG PICTURE ON THE TOTAL AUDIO

CIM ES / TGM / CDJ

+ INTRO QUESTIONS FROM
CIM RAM

+ CIM AUDIO TIME

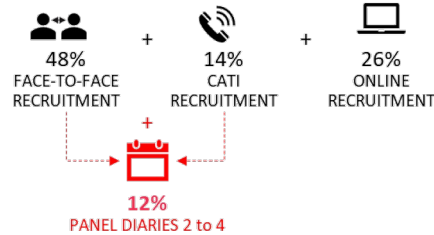
Penetration, frequency of use and time
spent data for main audio contents and
devices

+ EVOLUTION OF AUDIO
SHARES THANKS CAT 2023

CURRENCY RADIO STUDY

CIM RAM
(BROADCAST + OIP RADIO)

MIX RECRUITMENT



+/- 33%
PAPER DIARIES

+
+/- 67%
DIGITAL DIARIES

+ INTEGRATION OF CIM
MEDIAWATCH PANEL
+ PMM ASCRIPTION

DETAILED AOIP MEASUREMENT

CIM RADIO STREAM
MONITOR

Server centric measurement of traffic
of participating live digital radios

+ AOD/PODCASTS FROM
SUBSCRIBERS

WIP : WAYS TO RECONCILE THE ON/OFFLINE DIMENSIONS



Thank you !