

How to Face the Challenge of Audio Streaming

The 2011 European Radio Symposium

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GfK Telecontrol AG

Agenda

- 1 Radio over Internet
- 2 Our Approach / What must be measured
- 3 The Swiss Case
- 4 Our Developments
- 5 Fragmented Audience: Our Solution

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Radio over Internet

The Different Ways to Listen to Radio over Internet



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IP TV



PC/Notebook



Wilmaa



Smartphone



IP Radio



Our Approach / What must be measured

Approach

**We measure automatically and
we follow the recipient.**



**Real time –
Single source –
Multimedia**

**But what streaming needs
to be measured**



What must be Measured (1/2)



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« Streaming radio is still in its infancy, particularly in Europe, and one of its biggest challenges is that of measurement. As a result, there is a lack of comprehensive national data for streaming audio usage in most countries. In Europe, the only country that measures streaming nationally is France. Most other European countries are only at the discussion and planning stages with respect to introducing nationwide streaming measurement systems and numerous technology and measurement issues will need to be resolved and agreed upon before these systems are launched »

EBU, Public Radio and New Media Platforms 2011, Executive summary.



What must be Measured (2/2)

Listening via streaming is increasing but still marginal.



France about 1% (source: Médiamétrie)



England 3.7% (source RAJAR)

No FM switch off in a near future.

- ⇒ Only Norway has planned a switch off in 2017
- ⇒ UK not before 2017 (but rather not before 2020)
- ⇒ FM likely to remain at least until 2020



The Swiss Case

Radio over Internet in Switzerland (1)

Frequency of radio usage via internet (live streaming)		KommTech 2010		KommTech 2011	
		Cases	%	Cases	%
Daily or almost daily	65	2.6	119	4.8	
Several times a week	98	3.9	90	3.6	
Approximately once a week	103	4.1	118	4.7	
Less than once a week	237	9.5	264	10.5	
Never	1'542	61.7	1'541	61.5	
No internet usage	454	18.2	373	14.9	

Source: Publica Data AG, KommTech Study 2011; n= 2505 interviews (60 questions on electronic communication and entertainment); universe = Total Switzerland, 15+.

86.9

What has been seen in a study:

94%	6%	⇒ About 1/3 not relevant for the Swiss Market
UKW		
Cable		
SAT		
DAB	Internet	not relevant

Source: Mediapulse follow up study to the Establishment Survey Q3/10 and Q1/11



Radio over Internet in Switzerland (2)

⇒ It has been decided with our Swiss customer to measure (at least in a first step) only radios with FM/DAB concession.

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun Svizra

Eidgenössisches Departement für
Länder, Verkehr, Energie und Kommunikation (ELKOM)
Bundesamt für Kommunikation (BKKOM)

UKW-Radiokonzessionen - eingereichte Gesuche

Stand: 7. Dezember 2007, 15 Uhr

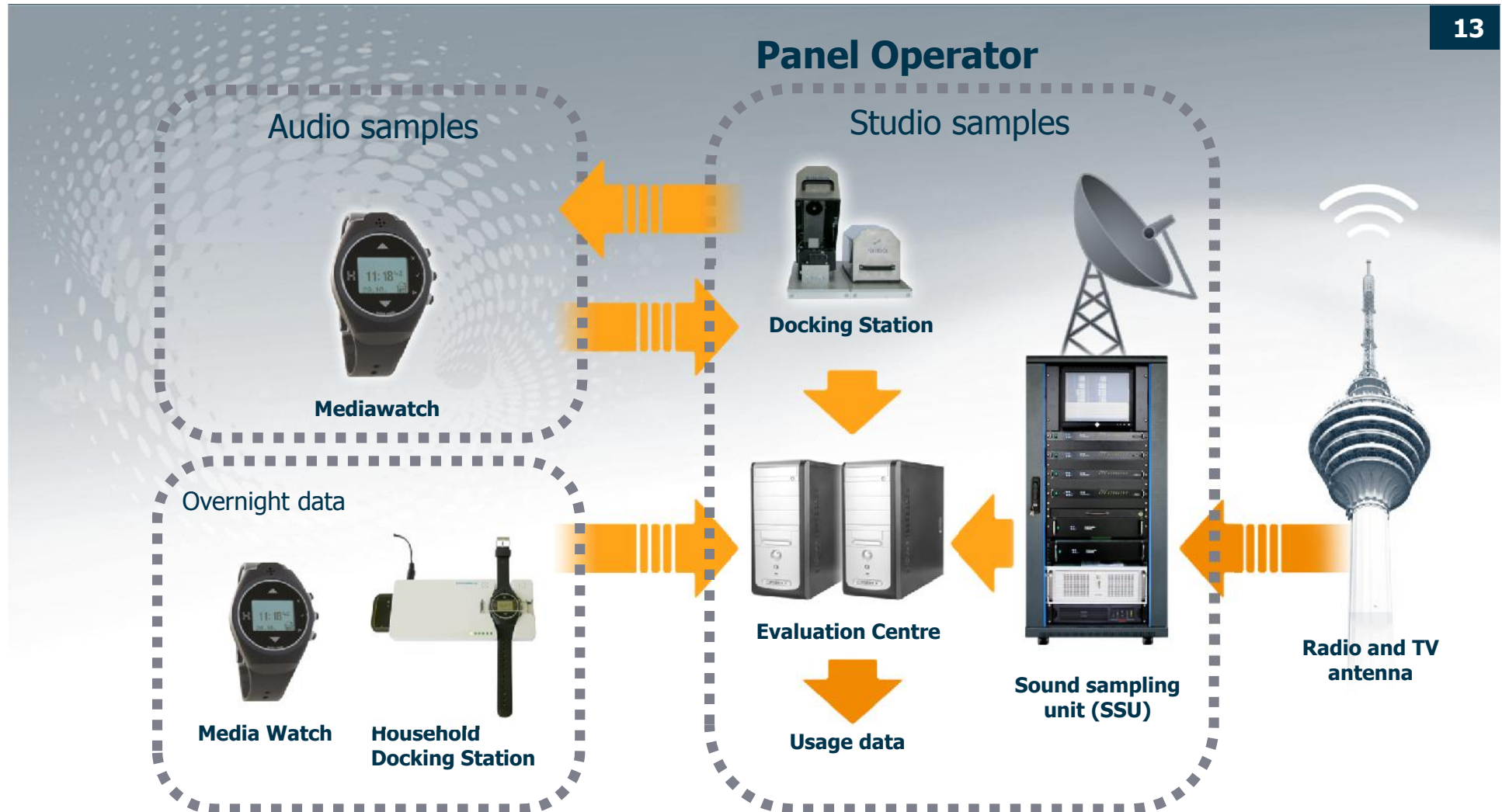
Verwaltungsgebiet	eingereichte Konzessionen	Gesuchsteller	heutige/radio. Trägerin
1. Region Genéve	1 komplementär mit LA und Gebührensatz	Association des Jeunes de Meyrin, Radio Meyrin FM Radio CMB Maxima - La Radio Des Nouveaux Musées	Association des Jeunes de Meyrin Comité de l'Association Radio CMB Maxima Consoth und Verein Maxima
2. Region Au-Lémanique	2 Konzessionen mit LA	Radio One FM SA Luzerne FM S.A. SUZZ FM (en formation) Rouge FM SA Radio Leo SA LEMAN LOCAL RADIO SA (projet)	Overtop Holding SA Overtop Holding SA Stéphane Batten-Mueller, Maurice Pella Fidélité Planetsat (Hicost SA) Fidélité Planetsat (Soral SA, Rouge FM SA) Hugh-Gerrens
3. Region Chablais	1 mit LA und Gebührensatz	Radio Chablais	Association du Chablais
4. Region Littoral	1 mit LA und Gebührensatz	Radio Riviera FM	Association Radio-Medley, Nouvelles et toutes d'avis avec l'Association Généraliste und Einzelpersonen
5. Region Riviera	1 mit LA und Gebührensatz	Radio Riviera	Valaiscom AG, Rotburktag AG
6. Region Au Juraissin	1 mit LA und Gebührensatz (Kanal 1)	RCJ FM SA (RUE - RTM - RFJ)	Pharis Baudat
6. Region Au Juraissin	1 mit LA (Kanal 2)	Pharis Lutz SA ABC FM SA	Luis-Premiers S&H (Jean-René Polgrot) und Luise S&H (François Vuillemin) Pharis Baudat
7 + 8. Region Fribourg/Fribourg	1 mit LA und Gebührensatz (97)	Radio Fribourg/Fribourg SA	Gaston Piller, Imprimere et Librairie St. Paul SA, Freilager Nachrichten etc.
9. Region Biel	1 mit LA und Gebührensatz (97)	Canal 3 AG	Radio Bâlestad SA (Cortis, Gasser und), Espace Media Group
10. Region Bienne	2 mit LA	Espace Media Radio AG - Capital FM Radio AG - Radio 98.1	Berner Zeitung AG (Espace Media Group) Ringer AG, PubliGroup
11. Region Bienne-Biel	1 komplementär mit LA und Gebührensatz	ASPHARE - Radio Bienne	AG für ein Gemeindefunkradio in Bienne ADMIB (Olivier Radio Bienne)
12. Region Berner Oberland	1 mit LA und Gebührensatz	Radio Berner Oberland AG	Friederichs Radio SaG, Martin Mörkel, Thomas Murgenthaler
13. Region Entremont	1 mit LA und Gebührensatz	Radio Entree AG	Städtische Versicherung, Schweizerische Radio Entree, Heidi&Stef Bärtschi, Österreichische Medienkommission, Sumarcom AG, Gemeindefunk Durgflon
14. Region Solothurn-Ober	1 mit LA	Radio 32 AG	Vogel-Schulz Holding AG, Solothurn
15. Region Aargau	1 mit LA	Radio AG (Schweizer) Radio Argovia AG	Roger Schwabert RT Holding AG, AZ Medien AG
16. Region Aargau-Nieder	1 komplementär mit LA und Gebührensatz	Kanal 8	IG Regionradio
17. Region Basel	2 mit LA	Radio Basel T AG Radio Daxinh-Syntex AG	Baier Zeitung Medien, Radio Neustädter S.A. Martin Wagner
18. Region Basel-Stadt	1 komplementär mit LA und Gebührensatz	RBB - Radio des mehr Basel basier Stiftung Radio X	Christine Heeb - RFT Medien für Erwachsene Stiftung Radio X

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Our Development

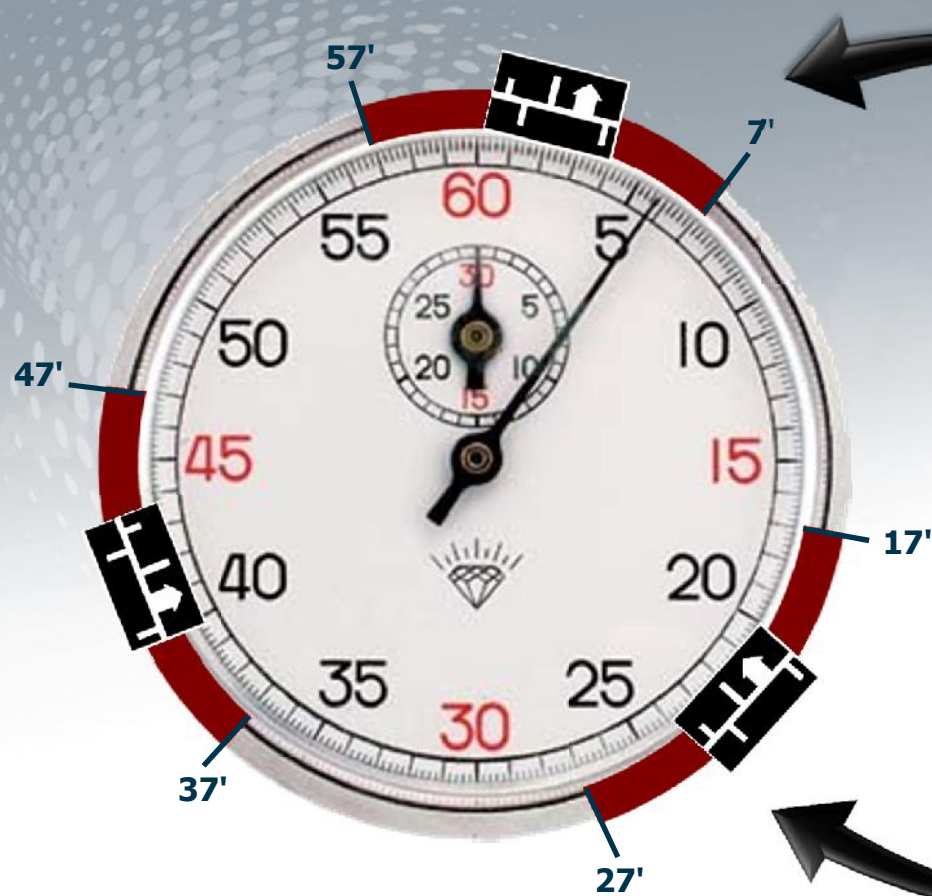
The Mediawatch System



Mediawatch Streaming

GfK TELECONTROL

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Reference samples

3 x 10 sec. per minute (+/- 3 sec.)



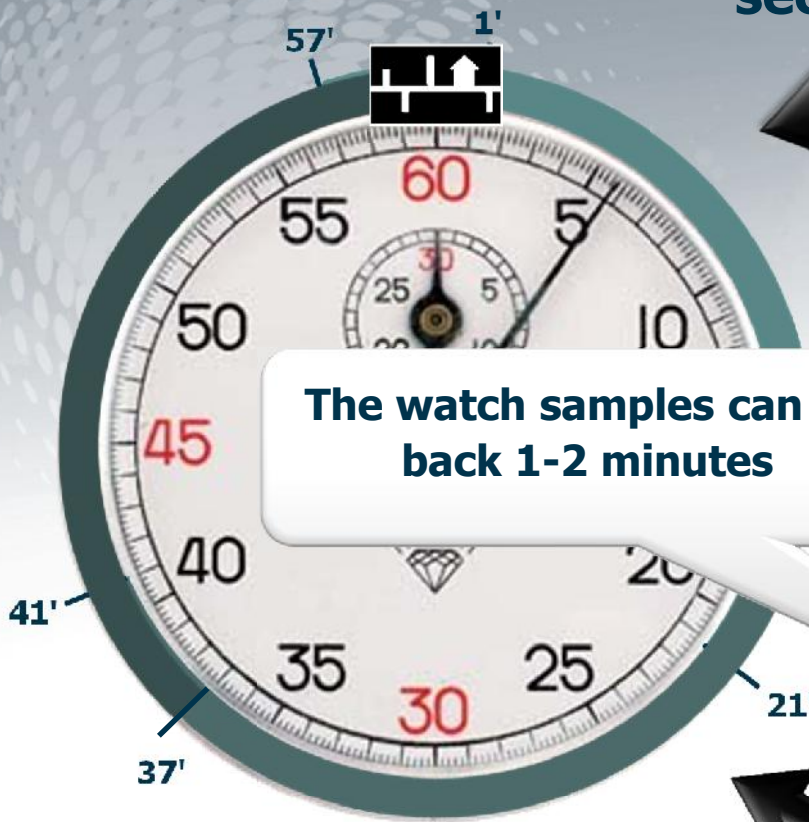
Watch samples

3 x 4 sec.

Internet Streaming



We need to cover the full 60 seconds



The watch samples can go back 1-2 minutes



Increase reference samples
3 x 24 sec. per minute (4 sec. overlap)



Watch samples

Example



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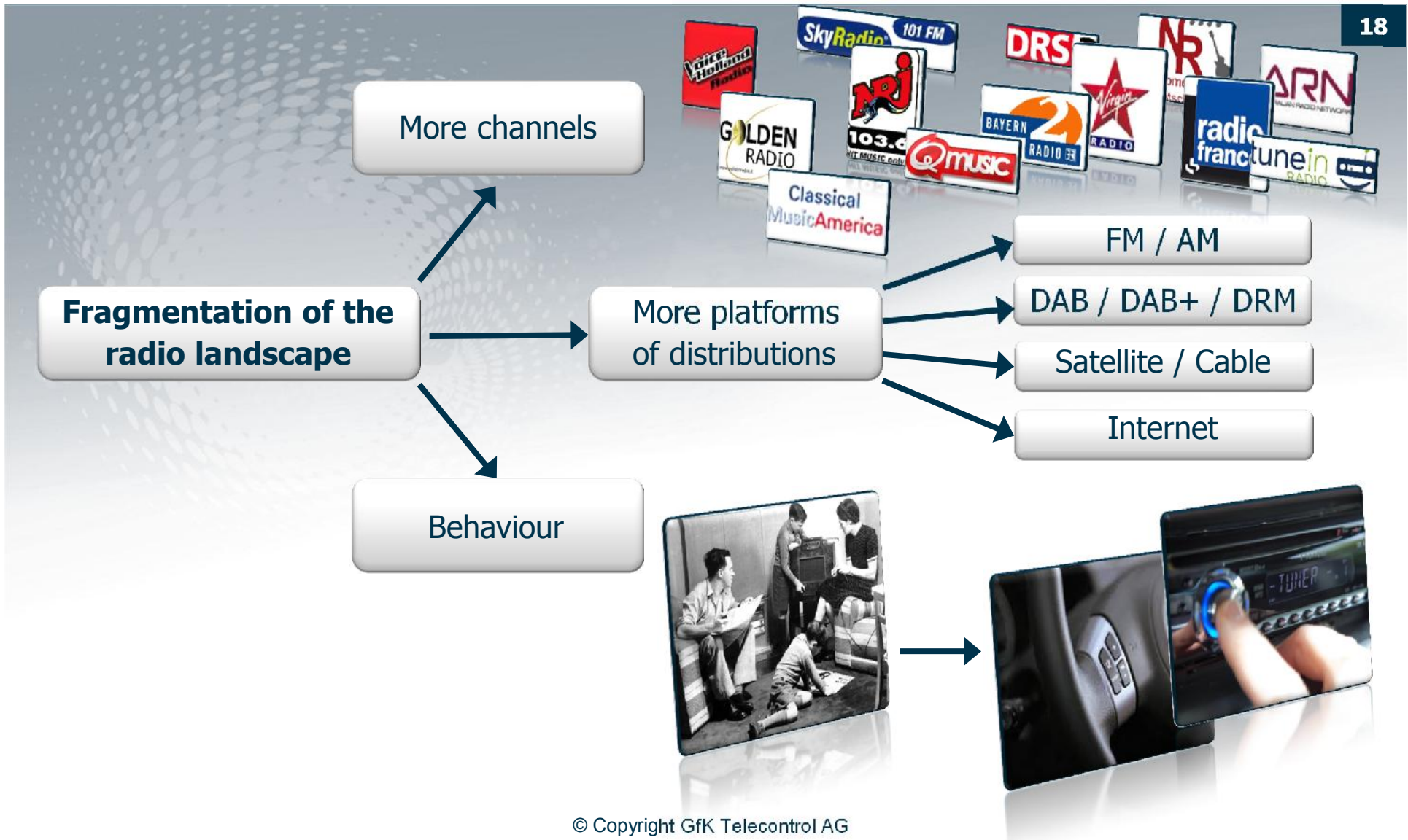
Date	Local time-interval	Type	PartID	WatchID	Match/dT	Wear	Prio	StatID	Source	StationName
19.10.2011	10:52:00 – 11:00:00	T0	000000	304636	0.00/ 0.00	0	0	0000		
19.10.2011	10:52:20 – 10:54:20	T1	000000	304636	0.44/ 3.10	0	0	1010	Cable	DRS3
19.10.2011	10:54:20 – 10:56:40	T1	000000	304636	0.64/ -62.70	0	0	1013	IP-Radio	Radio 32 Goldies
19.10.2011	10:58:00 – 11:00:00	T1	000000	304636	0.36/ -1.90	0	0	2007	Laptop	Radio RaBe
19.10.2011	11:00:00 – 11:01:20	T1	000000	304636	0.36/ -1.90	0	0	2007	Laptop	Radio RaBe
19.10.2011	11:01:20 – 11:04:40	T1	000000	304636	0.48/ -0.90	0	0	1012	iPhone	Radio Capital FM
19.10.2011	11:05:00 – 11:08:20	T1	000000	304636	0.45/ -1.80	0	0	1001	ASX Stream	DRS1
19.10.2011	11:08:20 – 11:11:20	T1	000000	304636	0.36/ -21.60	0	0	1001	ASX Stream	DRS1
19.10.2011	11:13:00 – 11:16:40	T1	000000	304636	0.62/ -27.70	0	0	1006	Wilmaa	SF1

We see that a vector recognition through time delay is not realistic \Rightarrow it is planned to introduce a limit between "traditional" and "new" platforms.

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Fragmented Audience: Our Solution

Fragmentation (1)



Fragmentation (2)

With one device/method an accurate measurement is only possible with a big sample, which is expensive ⇒ GfK data combination



⇒ **Different combinations possible using the same or different samples.**

Use of mass data, e.g. Site-centric data from Nurago and GfK NIS.

Conclusions



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- Radio over internet is gaining importance and must be measured in the future
- The measure is still in its infancy
- Not all channels can be measured
- The Mediawatch is further developed to measure streaming and to further follow the recipient
- Due to fragmentation the size of the samples should be increased
- GfK proposes to use information from different tools

