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australia **MEASURE**
10.10.2017 CONFERENCE
SYDNEY

Online Audio Unplugged

Presented by **Benjamin Masse**
Managing Director, Market Development & Strategy



A Global Leader in Digital Audio Technology

- Launched in 2006
- Since 2011, Triton's **webcastmetrics** is the standard in online audio advertising currency in the US, accredited by the MRC
- In 2013,  became the world's first programmatic audio advertising marketplace, supporting both open marketplace and private deals

200

Triton Digital
professionals

45

Countries

8

Office locations
worldwide

Preeminent Publishers



Webcast Metrics® Measurement Overview

Trusted

The ONLY MRC accredited service measuring streaming audio

Comprehensive Audience Measurement

- True census measurement
- Captures all listening, in any location & on every device
- On every subscribing service

Quality Control

Only Real Listeners Counted

- Spiders & Bots filtered out

One Minute Rule

- Sessions under one minute eliminated from reporting

Fraud Detection

- Double listening is eliminated
- The Publisher's own IP address is excluded from measurement
- Any session lasting more than 24 hours is not counted



Webcast Metrics® Monthly Rankers

Average Active Sessions (AAS):

Total Listening Hours (TLH) divided by hours in the reported time period. TLH is defined as the total number of hours that the station/publisher has streamed during sessions with a duration of at least one minute in total within the reported time period.

Session Starts (SS):

The number of different requests for streams with a duration of at least one minute in total within the reported time period.

Average Time Spent Listening (ATSL):

The average number of hours for each session with a duration of at least one minute in total within the reported time period.

JULY LATAM RANKER (based in AAS)¹
DAYPART 6:00am to 7:00pm, Monday through Friday

	Publisher	Average Active Sessions	Session Starts	Average Time Spent Listening
1	Prisa Radio (*List of countries in footnotes)	55,426	17,069,359	0.83
2	Grupo Radio Centro (Mexico)	11,332	3,215,220	0.94

JULY GLOBAL RANKER (based on AAS)

DAYPART 6:00am to 8:00pm, Monday through Friday

	Station	Average Active Sessions	Session Starts	Average Time Spent Listening
7	iHeartMedia Network ¹	960,430	437,840,429	0.63
8	1 iHeartRadio	361,155	203,743,273	0.51
9	2 Prisa Radio	110,924	42,918,414	0.82

JULY US RANKER (based on AAS)

DAYPART 6:00am to 8:00pm, Monday through Friday

	Station	Average Active Sessions	Session Starts	Average Time Spent Listening
7	iHeartMedia Network ¹	945,831	429,884,917	0.63
1	Pandora Corporate	2,349,404	1,152,222,466	0.59
2	Spotify Corporate	1,948,891	1,340,890,560	0.42
3	iHeartRadio	355,826	200,118,982	0.51
4	NPR Member Stations ²	58,346	20,538,556	0.81
5	Cumulus Streaming Network	51,767	20,426,064	0.73
6	CBS Radio Inc.	43,097	15,684,439	0.78
7	Entercom Communications Corp.	21,650	9,948,936	0.63
8	Univision	20,786	13,889,233	0.44
9	AccuRadio	19,660	2,593,303	2.17
10	ESPN Radio Corporate	16,696	7,149,134	0.68
11	Beasley Broadcasting Corporate ³	16,385	6,622,898	0.72
12	Salem Communications	12,455	5,071,411	0.70
13	Hubbard Broadcasting	12,057	2,884,534	1.19
14	New York Public Radio	11,059	3,573,743	0.88
15	Townsquare Media	10,098	3,092,996	0.95
16	Emmis Communications	9,350	4,216,355	0.64
17	Radio One	8,790	3,826,801	0.66
18	EMF Corporate ⁴	8,783	2,542,047	1.00
19	Bonneville Corporate	6,149	2,762,110	0.65
20	Prisa Radio	5,706	2,881,097	0.67

Monthly Ranker Comparisons

DAYPART 6:00am to 8:00pm, Monday through Friday

Global

	Station	Average Active Sessions	Session Starts	Average Time Spent Listening
1	iHeartRadio	361,155	203,743,273	0.51
2	Prisa Radio	110,924	42,918,414	0.82
3	NPR Member Stations ²	64,998	23,030,943	0.80
4	Cumulus Streaming Network	53,326	20,900,730	0.73
5	CBS Radio Inc.	43,143	15,697,911	0.78
6	AccuRadio	34,750	4,660,354	2.09

LATAM

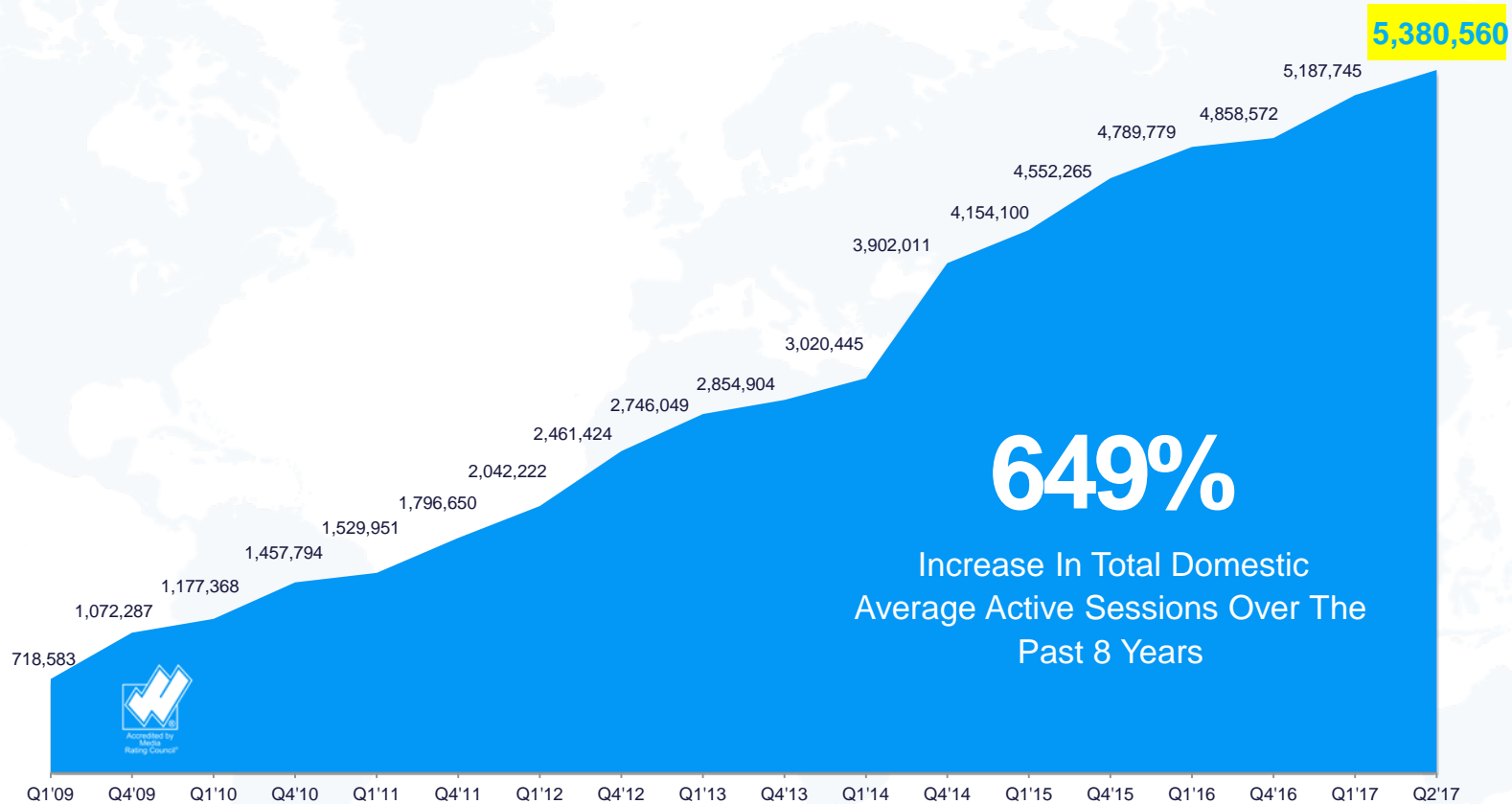
1	Prisa Radio (² List of countries in footnotes)	55,426	17,069,359	0.83
2	Grupo Radio Centro (Mexico)	11,332	3,215,220	0.94
3	Grupo Acir (Mexico)	10,072	2,669,218	1.01
4	Grupo JBFM (Brazil)	9,082	1,902,520	1.29
5	Corporacion Radial del Perú (Peru)	8,746	2,258,350	1.04
6	Cadena 3 Argentina (Argentina)	5,347	1,104,936	1.30

US

1	Pandora Corporate	2,349,404	1,152,222,466	0.59
2	Spotify Corporate	1,948,891	1,340,890,560	0.42
3	iHeartRadio	355,826	200,118,982	0.51
4	NPR Member Stations ²	58,346	20,538,556	0.81
5	Cumulus Streaming Network	51,767	20,426,064	0.73
6	CBS Radio Inc.	43,097	15,684,439	0.78



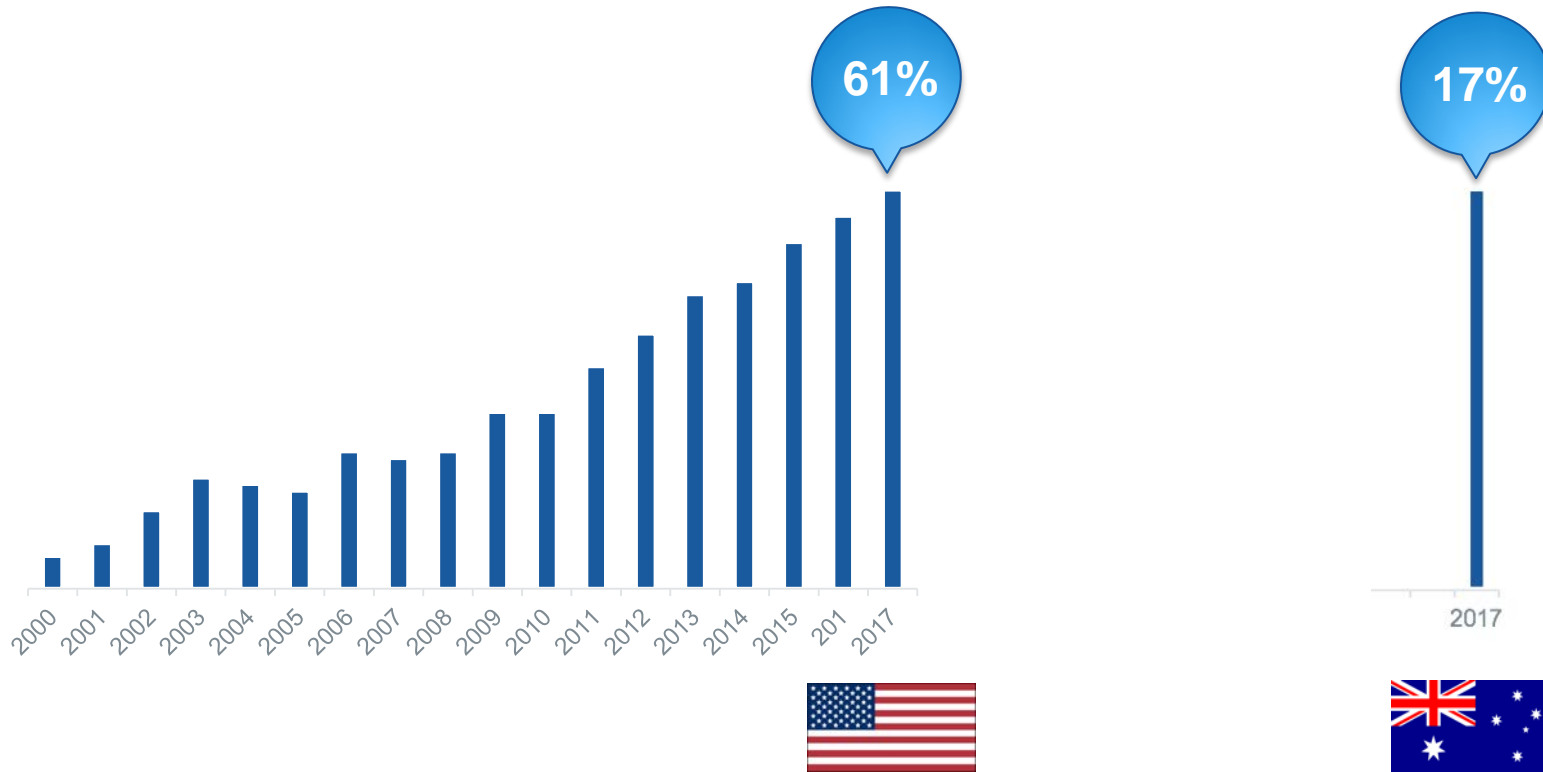
Market Growth: Total U.S. Listening



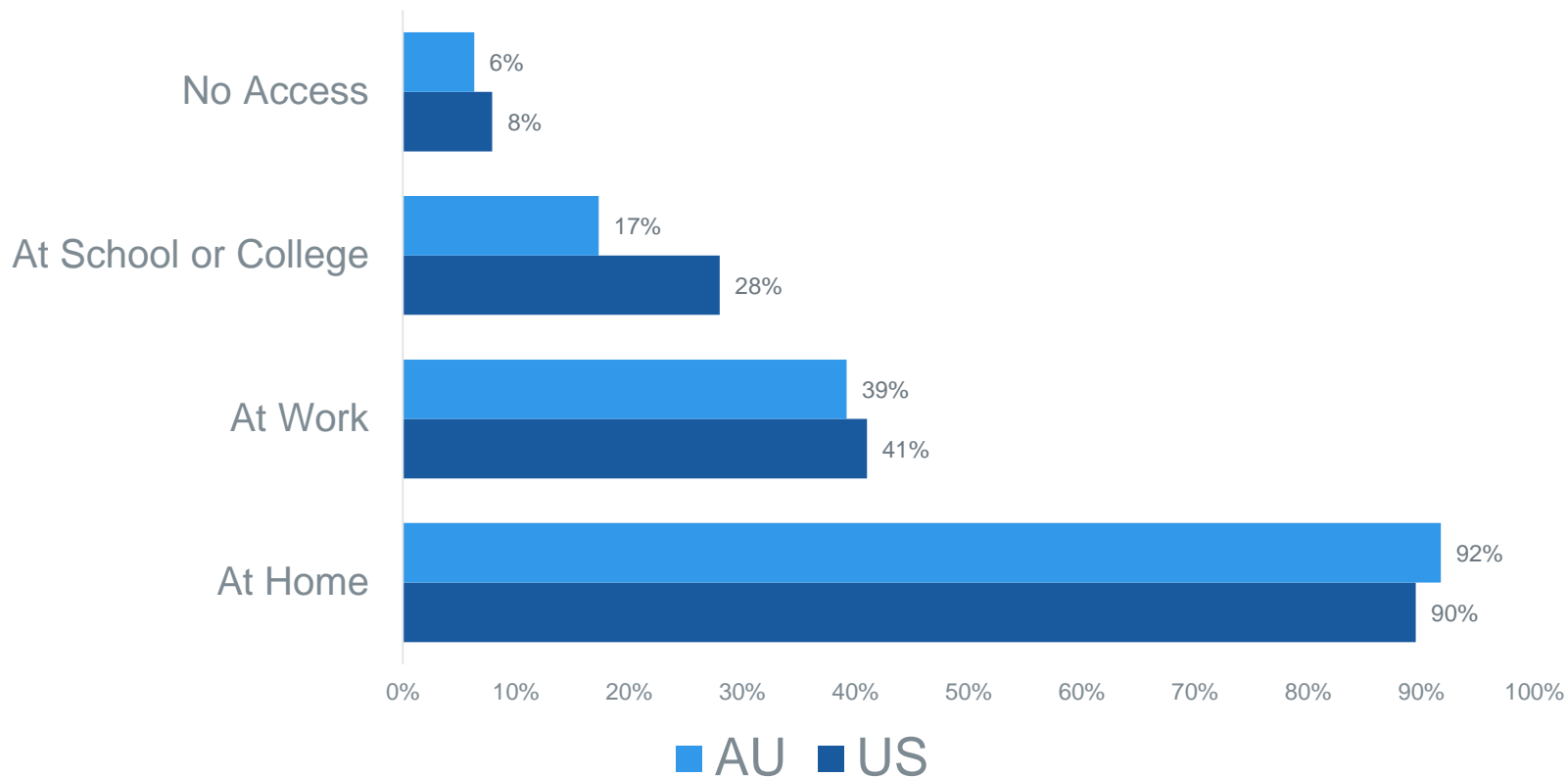
Online Radio: Monthly Listening

% of the Population 12+ Listening to Online Radio in the Last Month

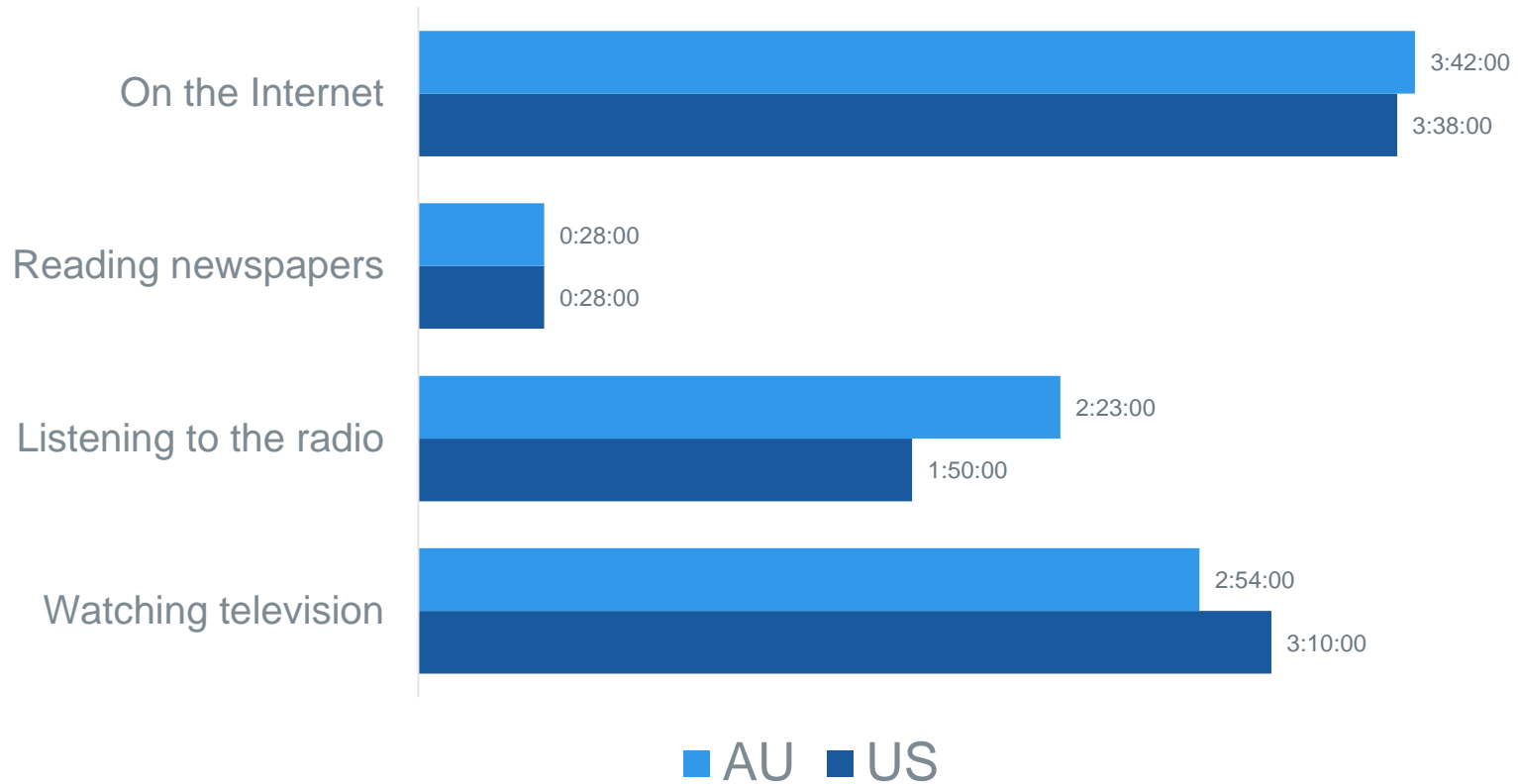
Online Radio is defined as listening to AM/FM radio stations online / listening to streamed audio content available only on the internet



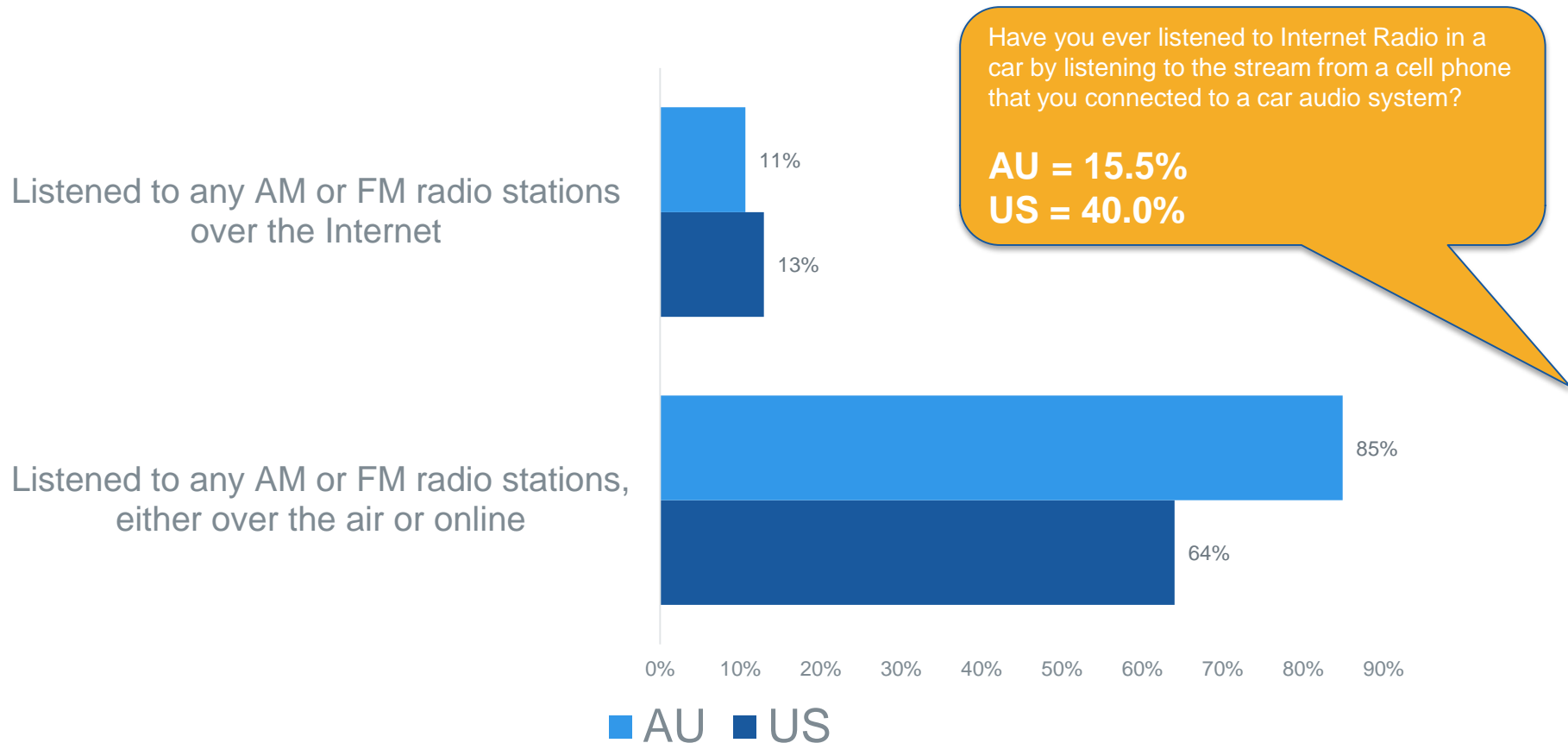
Internet Access



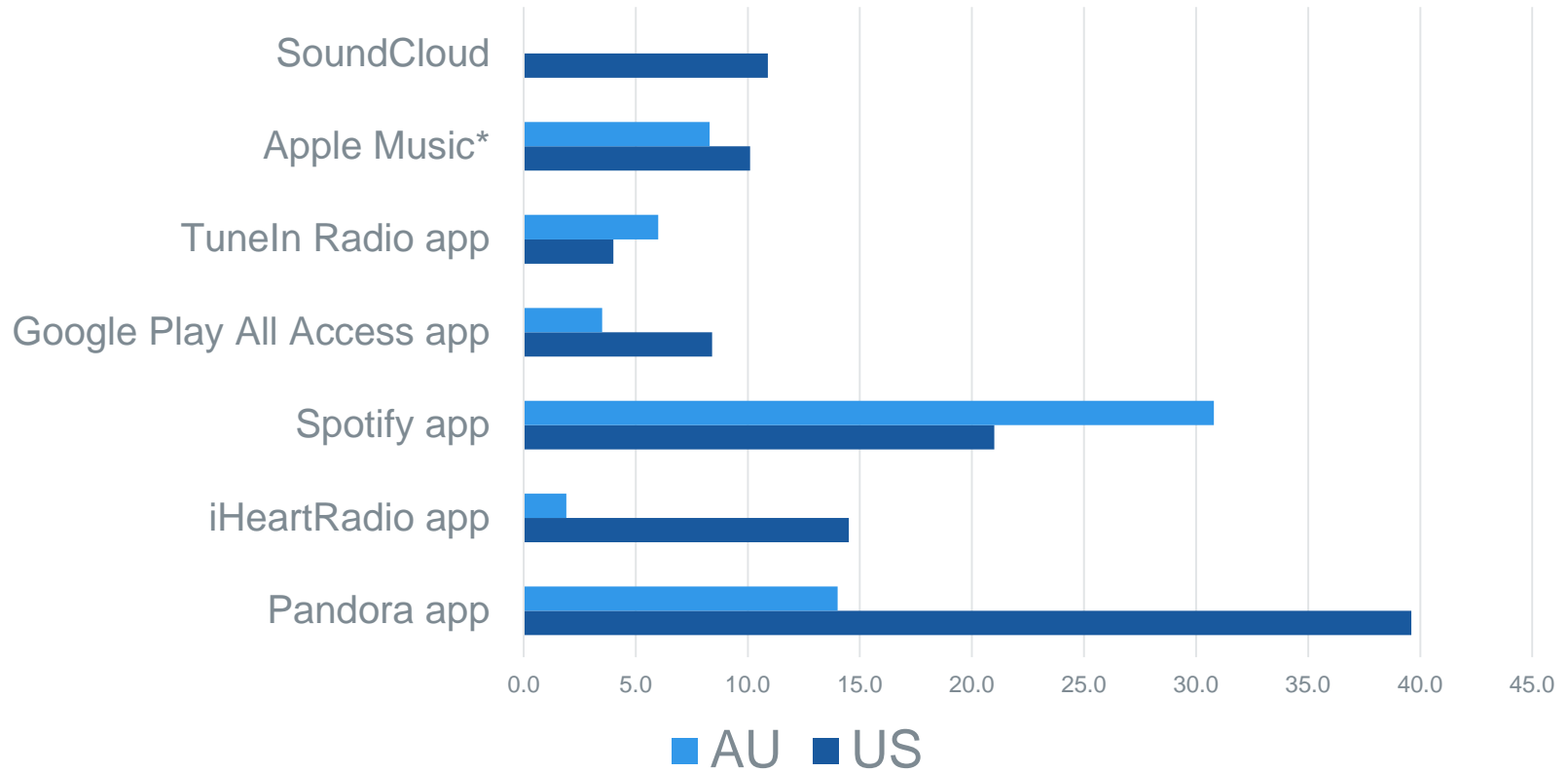
Daily Time Spent



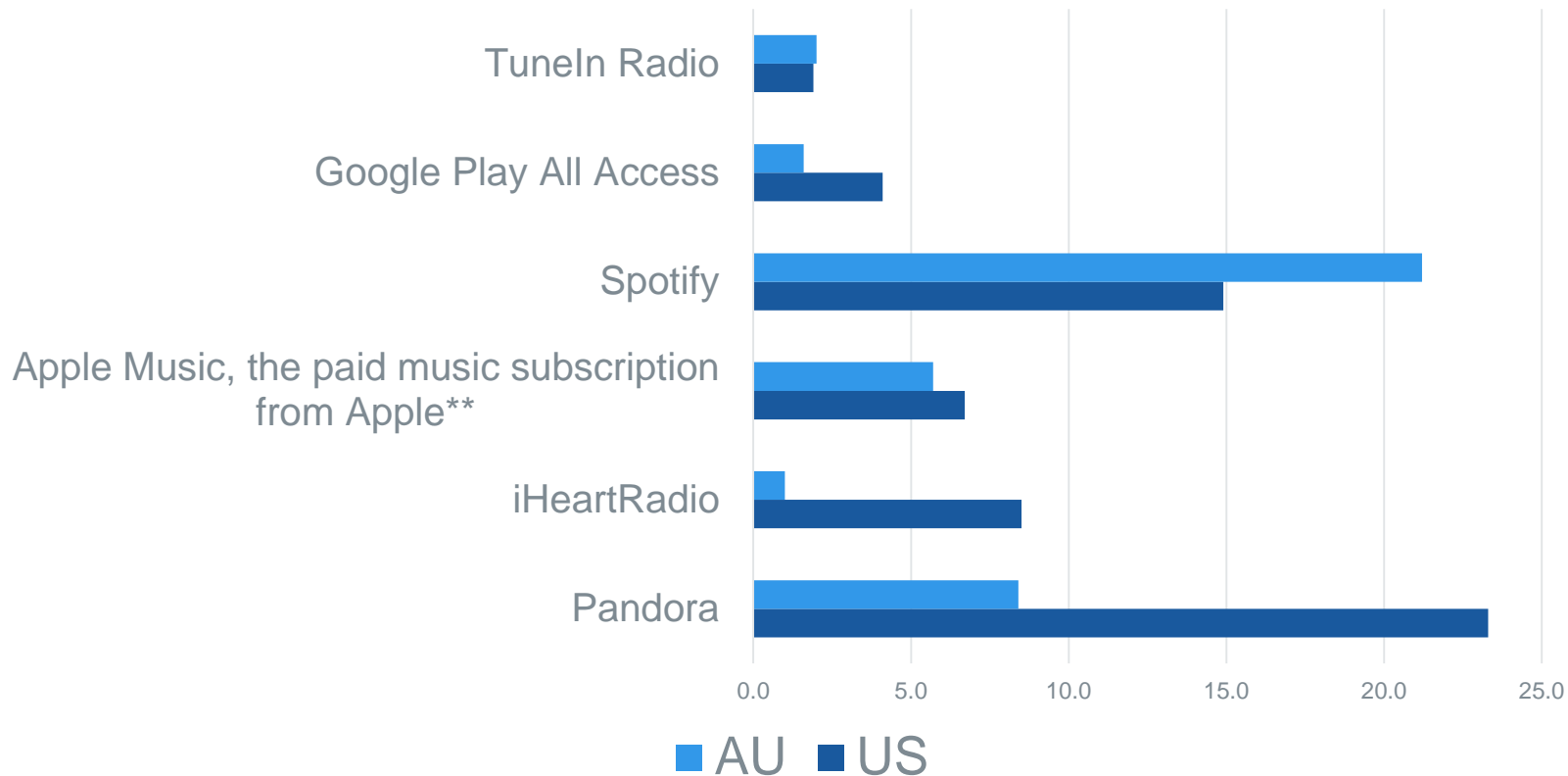
“Last Week” Radio Listening Trends



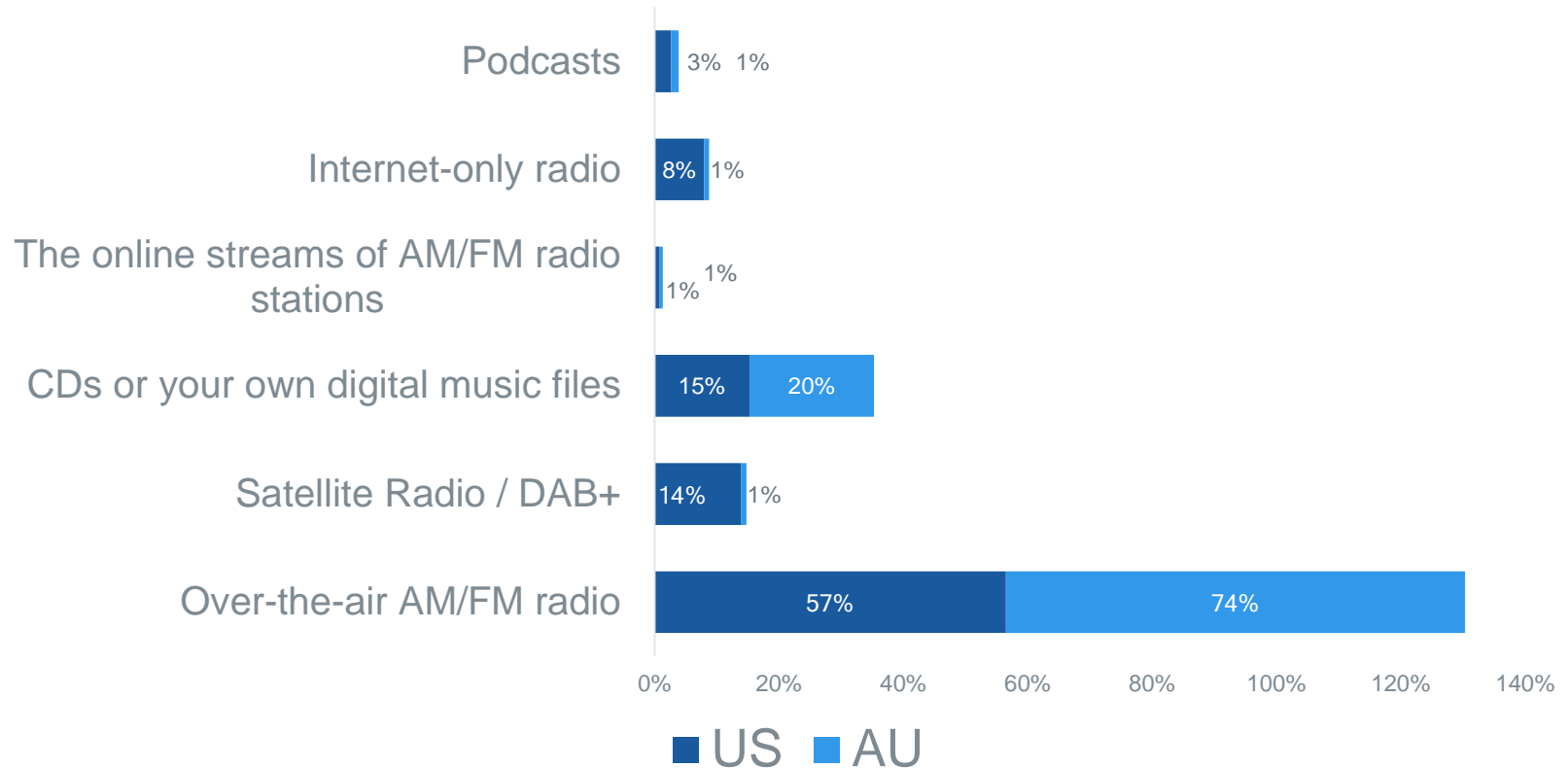
Installed Mobile Applications



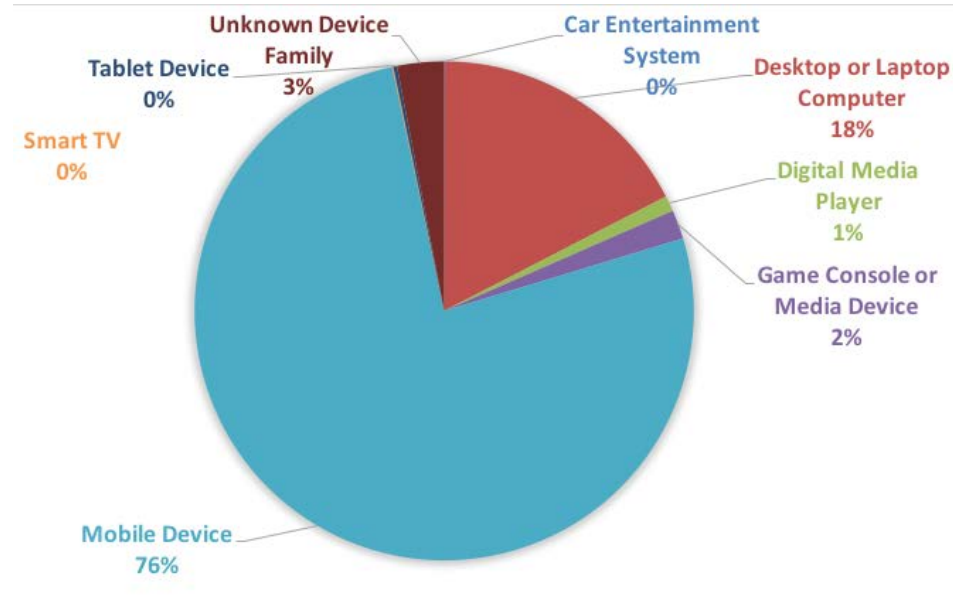
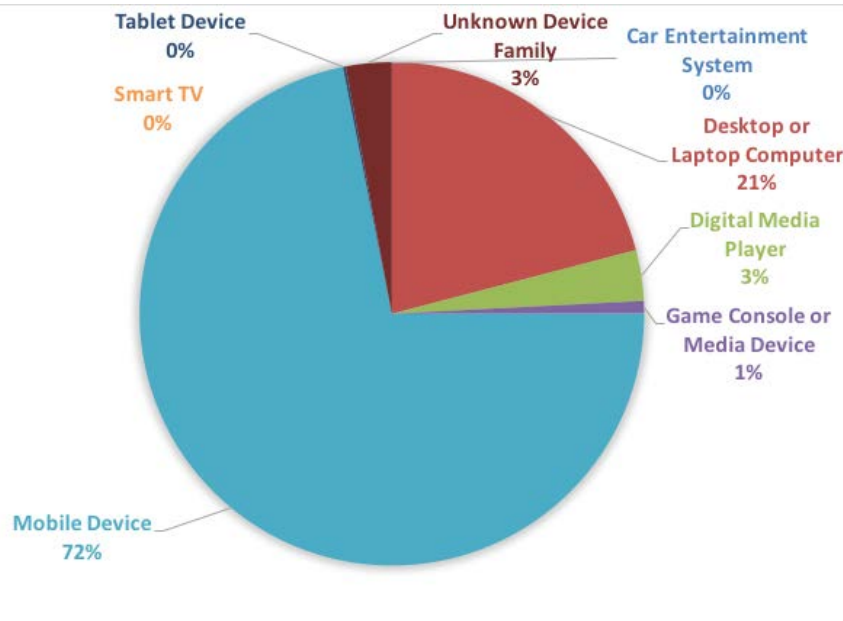
“Last Week” Audio Brand Usage



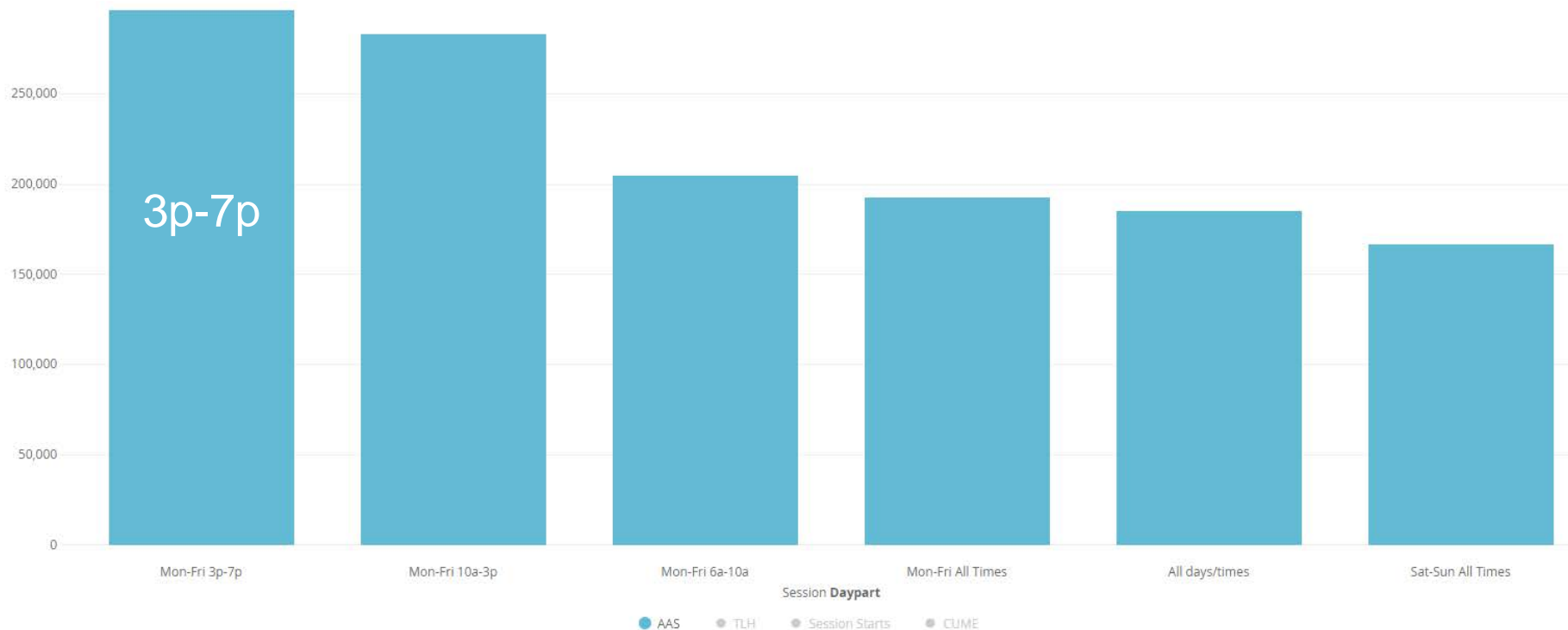
Which of the following do you listen to MOST in your primary vehicle?



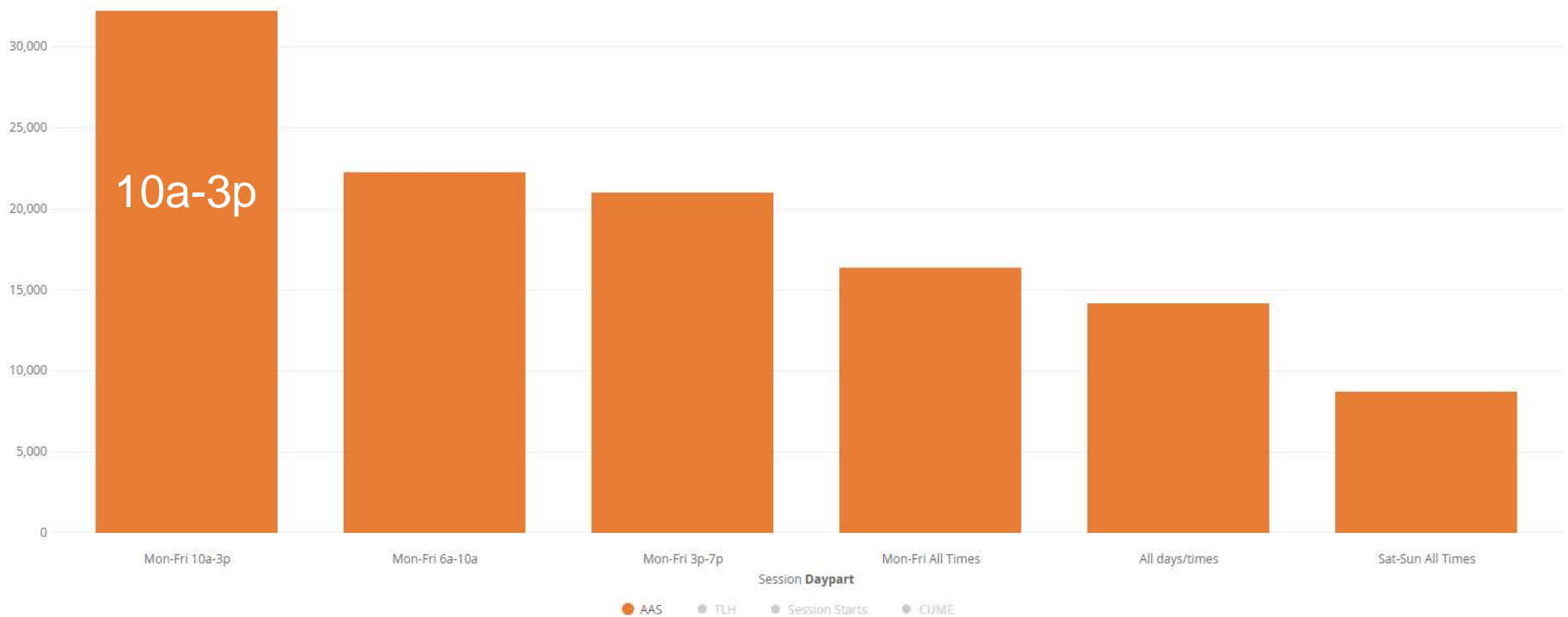
Online Audio: Device Usage



Online Audio: Dayparts

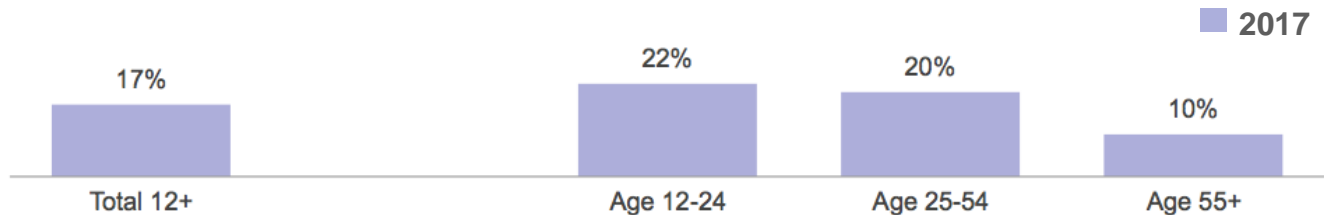
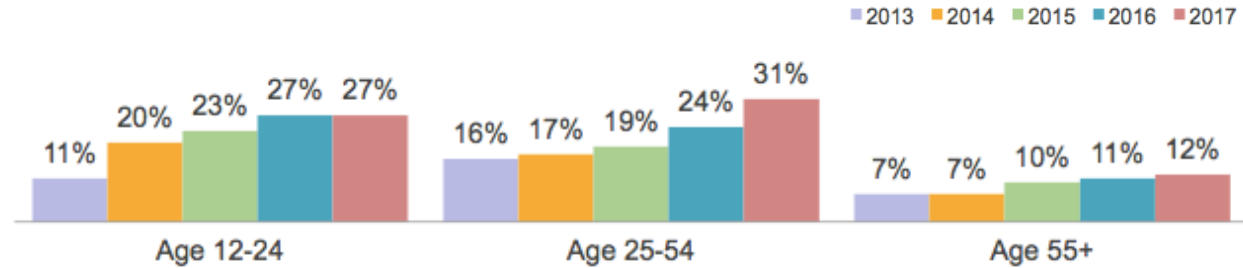


Online Radio: Dayparts

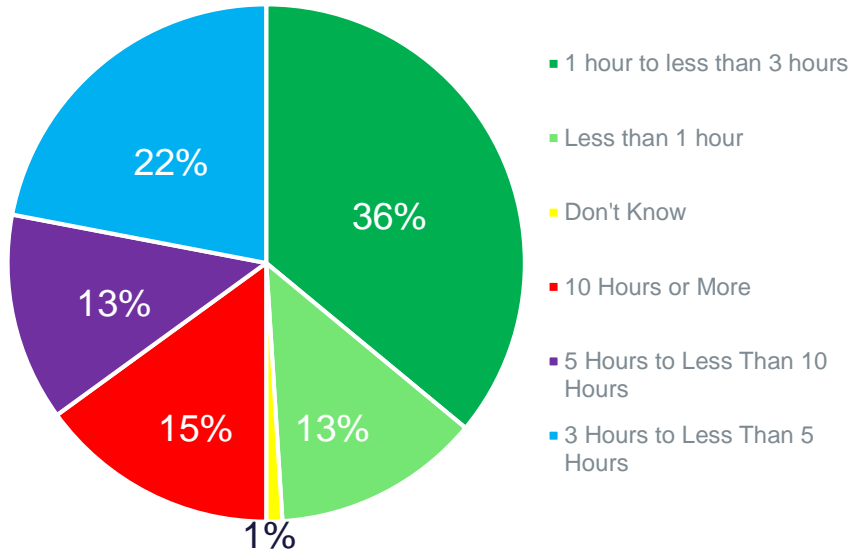


Podcasts: Monthly Listening Market Penetration

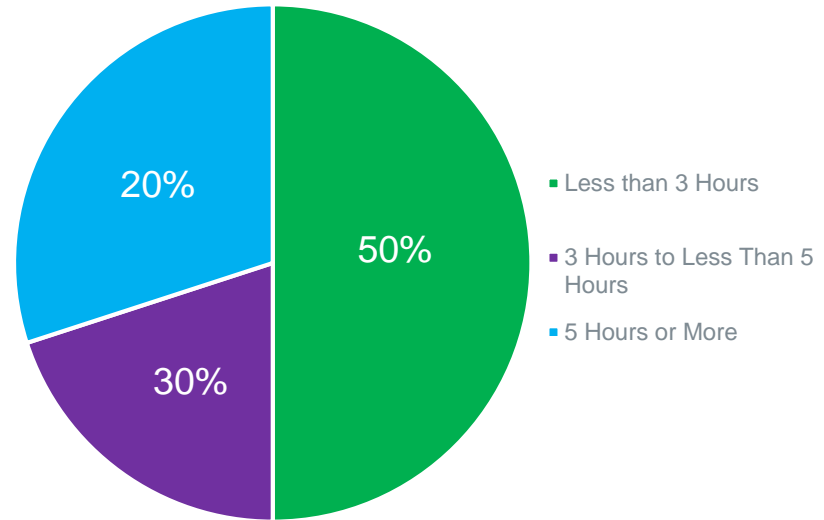
% of the Population that has Listened to a Podcast in the Last Month



Podcasts: Average Weekly Listening

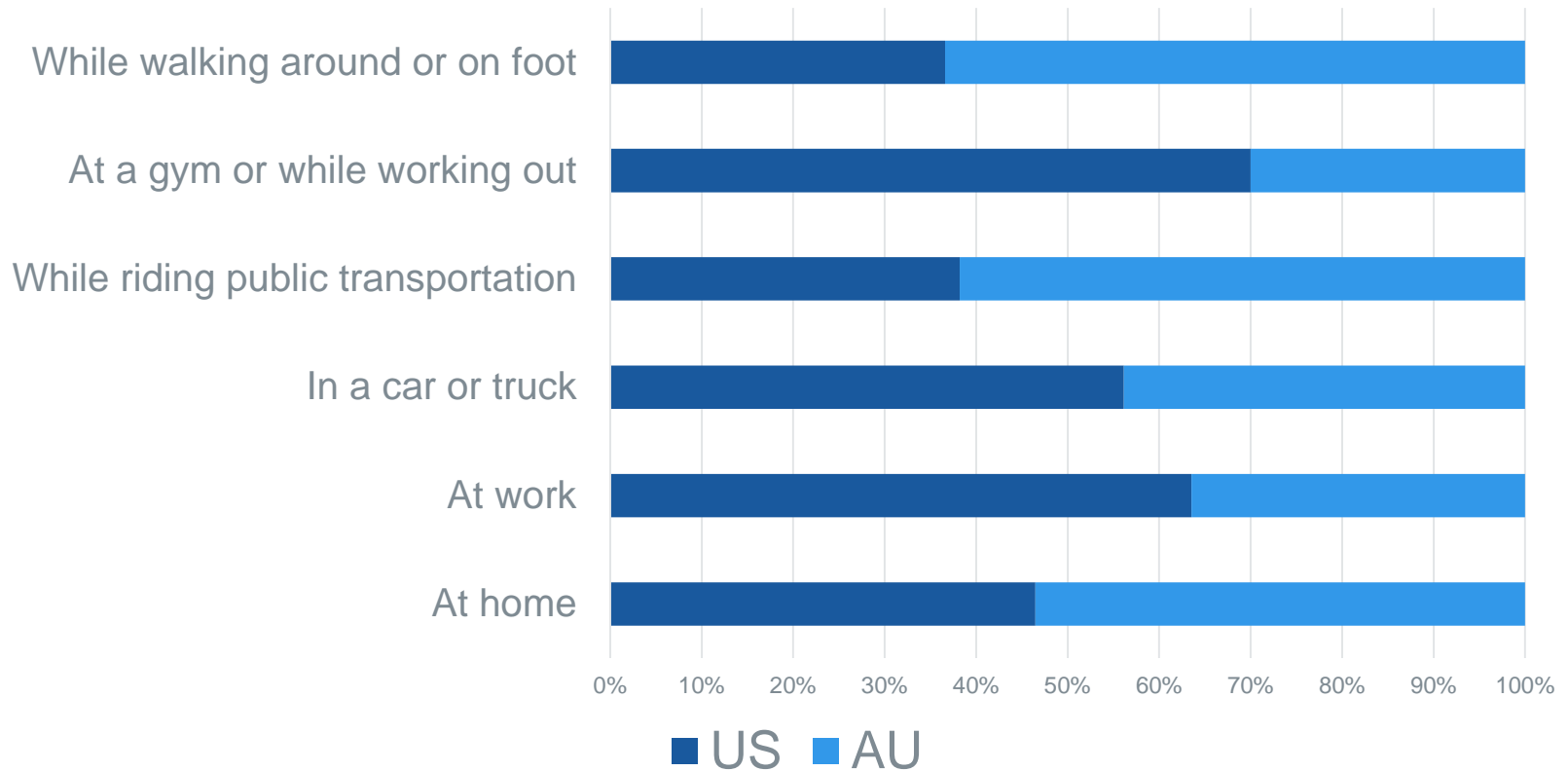


Mean: 5 hours & 7 minutes

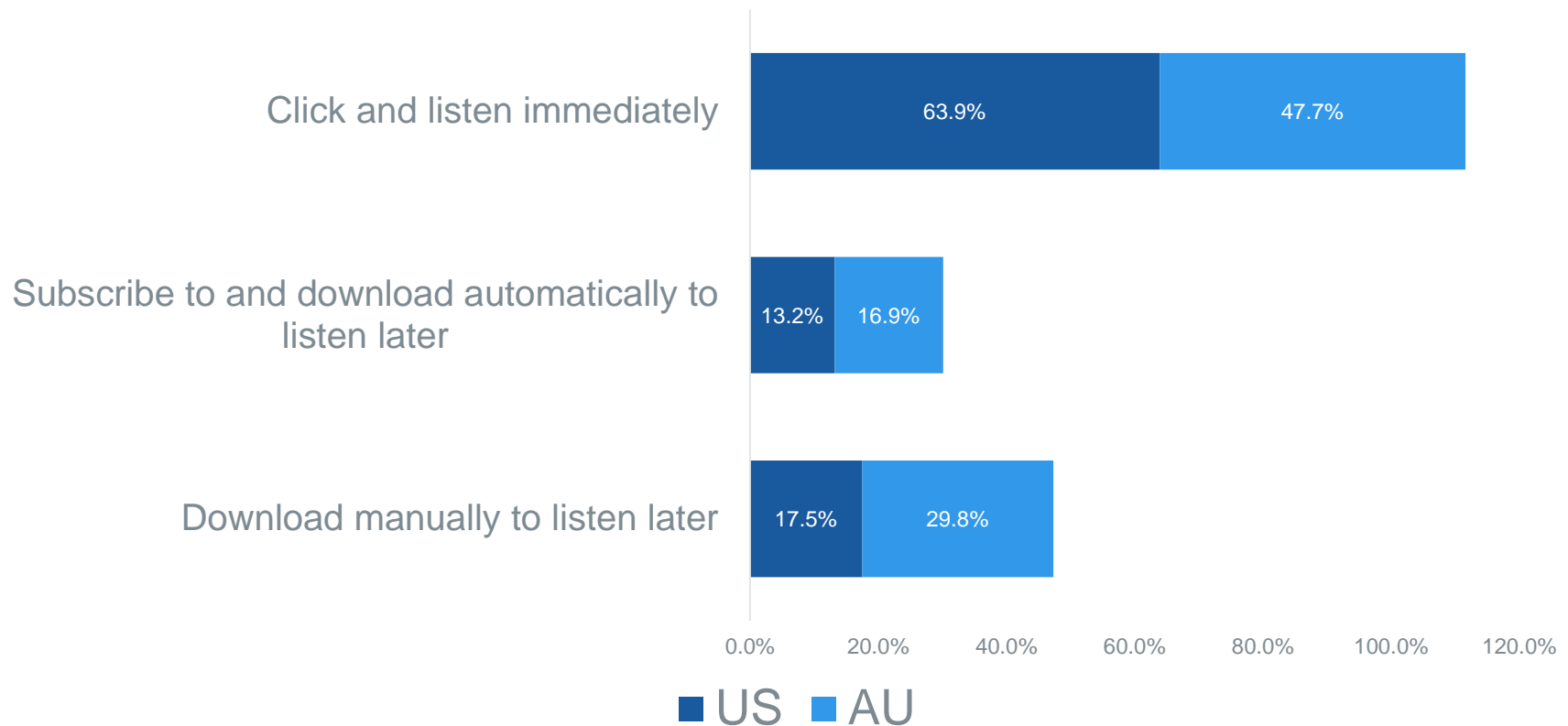


Mean: 5 hours & 22 minutes

Podcast: Listening Locations



Podcast: Listening Methods



Online Audio Advertising Ad Insertion & Replacement

UPSTREAM



Broadcast

Live stream is broadcasted



Encoding

Broadcast is encoded with programmatic programming breaks defined



Network



Ad Serving

Ads are stitched into the stream replacing the original broadcast ads



Ad Decisioning

Campaign's requirements and audience profile are utilized to select targeted audio ads



Player / App

A unique stream is delivered to each player/app with targeted ads stitched directly into the content eliminating detection by ad-blocking software



User

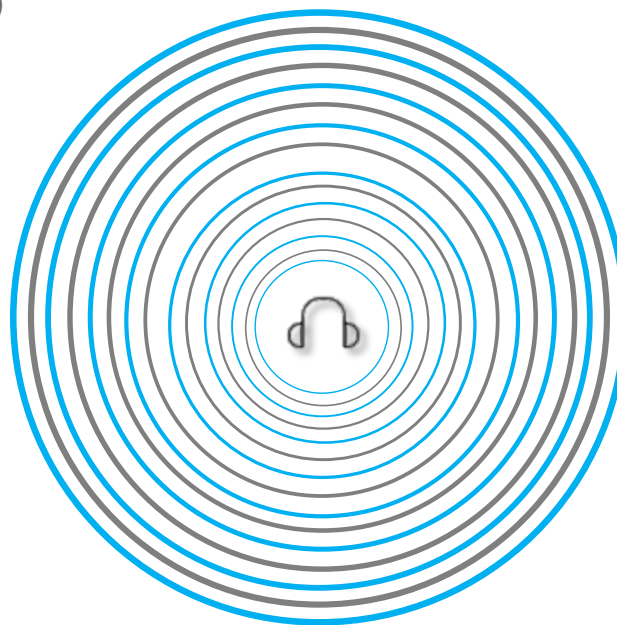
The user experiences a seamless ad-supported listening experience

DOWNSTREAM

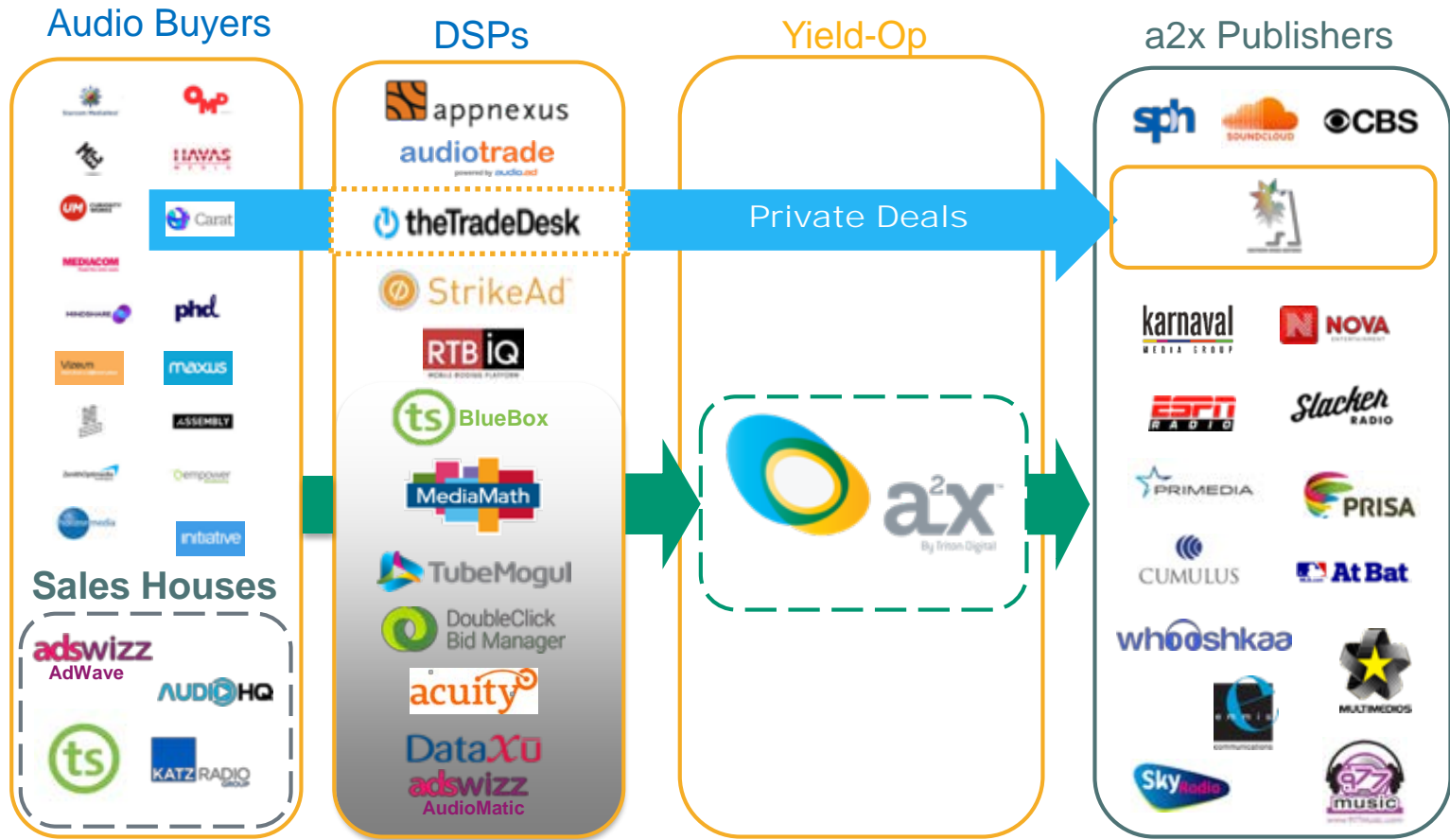
Online Audio Advertising Targeting Capabilities

Target by

- Registration Info (Age & Gender)
- Deterministic and inferred
 - Cookie
 - Mobile Ad ID
 - IP Address
- Geography
 - Regional
 - Metro
 - GPS
- Device



Programmatic Online Audio Advertising



Online Audio Advertising Tracking & Attribution

- Track everything (audio & display units)
 - Spend/Pace
 - Delivery by impressions, geo or device
 - Frequency & recency
 - Creative reporting, including quartiles and clicks
- Use player and server side information to provide best results back to your tracking systems
- Example of Macros include: Passing Mobile Ad ID, User Agent, IP Address, Publisher, Station, etc.
- For the most detailed consumer reporting, utilize tracking systems that complement your KPI

Proven Results: 9x Increase in Page Views

Advertiser

Big Box Retail

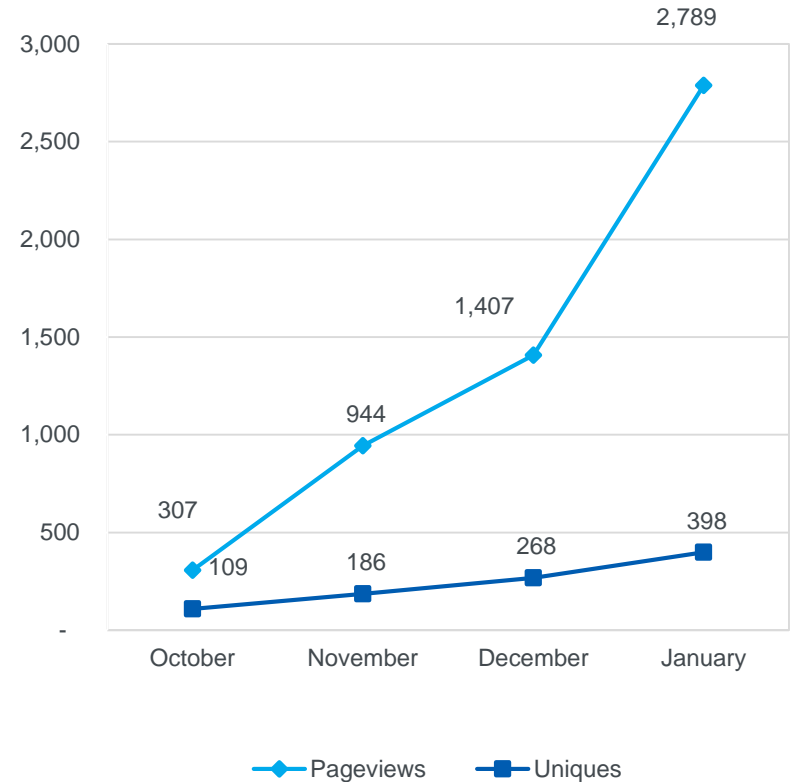
Objective

Drive traffic and measure intent to push recall of retailer messaging, producing subsequent visits outside of companion banner clicks to website and KPIs.

Results

Frequency of visits grew due to ongoing exposure of campaign and weekly retail promotions.

Uniques grew **4x** while pageviews grew **9x** over four months. Resulting in targeted valued conversions to site per the KPIs.



Proven Results: Digital Audio Drives Lift

Advertiser

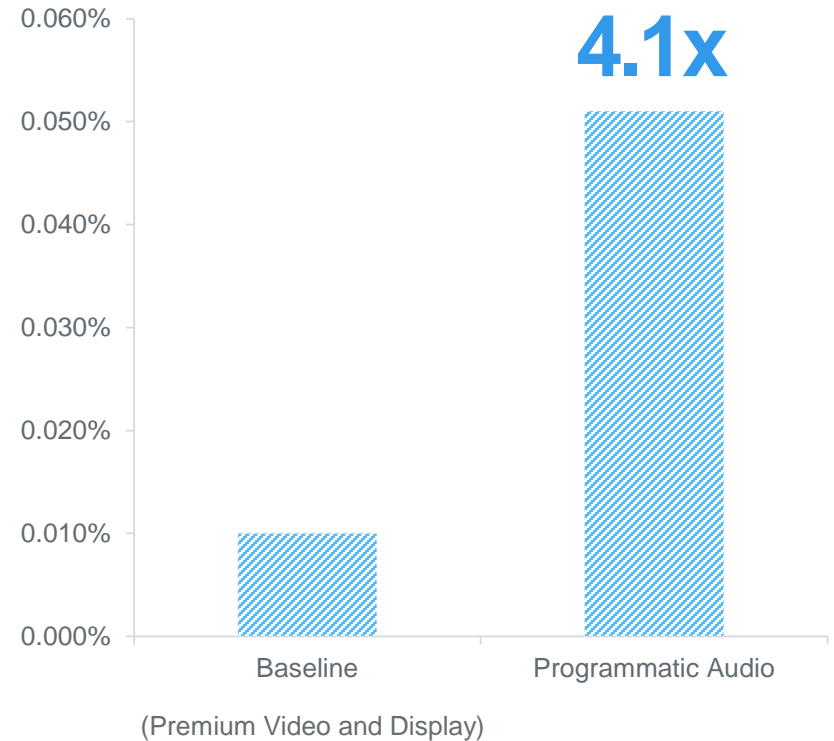
Consumer Credit Card

Objective

Build brand and engage with two highly valued tasks at site. Track KPIs via cookie and Ad ID over a 30 day window.

Results

When audio was added to the overall mix, they saw a **4.1x** increase in engagement of the KPIs, proving that audio drives lift when in concert with other programmatic channels.



Thank You



Online Audio Unplugged

Presented by **Benjamin Masse**


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