

egta

ACTIVITY REPORT

MAY 2014

MAY 2015

RADIO

A YEAR IN EGTA: MAY 2014 TO MAY 2015

WHAT DID YOUR ASSOCIATION DO FOR YOU?

This document is the first part of egta's Activity Report, which aims at giving a clear overview of the numerous and rich activities organised by the team in Brussels. For egta's AGM41, you will therefore be provided with two documents: on the one hand, this paper, giving a description of events and projects carried out by your association (sent a month prior to the Annual General Meeting, as legally required). On the other hand, you will receive during the AGM in Budapest, a brand new version of this report: a set of infographics, which will provide at a glance concrete examples of how a given topic flows through egta's three departments, together with a set of facts and figures about your association. A dynamic oral presentation of these reports will be given during the statutory session on May 21.

ON THE RADIO SIDE:

The following topics were central to egta's radio activities throughout 2014 and 2015:

- The (re)**positioning** of radio – to promote the perception of radio as an effective media channel and the power of audio as an advertising format.
- Developing strategies for growing and **monetising digital audio**.
- Proof of radio's **effectiveness** as an advertising platform.
- **Innovations** in advertising models around audio.
- Best practices to bolster **creativity** in advertising and **new revenue streams**.
- Audience **measurement, accountability and ROI**.
- New approaches to **pricing, targeted advertising and non-spot revenues**.

New Radio members

ProfMedia (Russian Federation), Video International Radio (Russian Federation), Karnaval Media Group (Turkey), IPL (Luxembourg), Saran Holding (Turkey), REGIOCAST (Germany).

- **In May 2015 the association counts 129 members (87 TV members and 42 Radio members), established in 38 countries in Europe and beyond.**

Request centre

egta's request centre aims to help you find a benchmark in many of the sectors, related to advertising, that have an impact on your daily business. From egta's last AGM (May 2014) until today (mid-April 2015), egta received no fewer than 318 requests of which 241 were related to TV, 51 were related to radio and 26 were related to cross media and/or other media.

- **From 2014 to 2015 YTD, this represents an increase of almost 50%. This means more than one request per working day.**

Regular Publications

- 22 **egta bites Radio** - an idea worth sharing amongst members
- 22 **Press reviews Radio** - a selection of relevant press articles from around the world
- 5 **EU Focus** - a detailed update on legal issues affecting the advertising business
- **Other Regulatory updates: 15**
- **egta Insight** : Topical brief on relevant radio subjects - to disseminate knowledge and raise awareness. After an introductory edition explaining the concept (January 2015), the 1st edition will be released at the AGM in May 2015 to focus on radio measurement across Europe.

Special Publications

- **egta's Business Directory:** one of egta's greatest strengths lies in its extensive network of members, built up over 40 years. Based on this insight, egta published in May 2014 a Business Directory, consisting of 126 members companies' profiles, featuring an overview of their TV/Radio activities, as well as a list of the top ten executives in charge of key departments within their sales houses. An update of this publication has been published for the 41st AGM and is available on egta's new website (in the Members' Room).
- **EU Regulatory issue briefs on audiovisual advertising:** these were designed for new Members of the European Parliament and European Commission in summer 2014. The objective of these briefs was to provide a summary of our key policy areas for the next 5 years including the current legislative status on each issue, the challenges ahead and egta's position on each one. The topics covered by these briefs include responsible commercial communications for alcoholic beverages; the AVMSD and the future of broadcasting regulation; food and beverage advertising, responsible advertising to children; data protection and online behavioural advertising; commercial communications for gambling services; and electronic cigarettes.
- Following up the *Radio Pricing & Sales methods, today and tomorrow* book published in May 2014, egta has decided to author a new publication titled **Automated & Programmatic Marketing: an egta publication on data-driven advertising sales for television and radio:** whilst a number of reports on the subject of programmatic trading have been published in recent months, we believe there is currently a lack of clarity in terms of the implications for broadcasters, and our objective through this publication is to better understand how broadcasters, their commercial departments and their industry partners assess the possible future trading landscape. This guidebook aims at giving you a better understanding of automated and programmatic trading, from basic definitions to the key development and success factors, through the different types of data, the legal issues and pitfalls to avoid for broadcasters. The publication will also include concrete cases from Europe and beyond. Much of the content is provided by various experts, both egta members and external partners, which we collected during a series of interviews

Training

- **egta Radio Training Course on the Monetisation of Online Audio**

In 2014 egta organised its first training course dedicated to increasing revenues from online audio. The first day's session looked at the online advertising ecosystem, offering practical insights into, and better understanding of, the latest market developments and trading mechanisms that drive revenue and growth of online and mobile advertising. The second day focused on audio's role

within the online market place and the latest online trading and advertising tools to monetise streaming audio (simulcast, web radio or personalised audio).

Radio Events

Conference (date, venue, host) – in chronological order	No. of participants	No. of speakers
AGM40 (incl. TV, Radio & Joint sessions) 22 – 23 May 2014 - Vienna (Austria) <u>Hosted by:</u> ORF Enterprise	58 (Radio session)	18 (Radio session)
egta Radio Training on the Monetisation of Online Audio 1 – 2 July 2014 – Brussels (Belgium) <u>Hosted by:</u> egta	22	9
European Affairs Group 2 October 2014 – Brussels (Belgium)	15	n.a.
Online Audio Taskforce Kick-off Meeting 19 November 2014 – Brussels (Belgium) <u>Hosted by:</u> egta	18	n.a.
egta Radio Marketing & Sales Meeting 20 November 2014 – Brussels (Belgium) <u>Hosted by:</u> RMB	53	12
Market Intelligence Meeting (incl. TV & Radio sessions) 29 January 2015 – Vienna <u>Hosted by:</u> Kronehit & RMS	61 (Radio session)	16 (Radio session)
European Affairs Group 19 February - Brussels	23	n.a.
Online Audio Taskforce (2nd edition) 14 April 2015 - Brussels (Belgium) <u>Hosted by:</u> egta	13	n.a.
TOTAL	263	55

For every meeting, egta also produces a “post event report”, as well as gives its members access to the presentations given, in PDF, and in a filmed video format (available respectively on the egtanet and on REPLAY). Please note that exceptions to this rule can be made for Academies and some working groups.

Partners’ events

The egta team attends partners’ events and meetings to stay informed of new developments in the radio industry.

- **Examples:** Radio Days Europe, RAIN Summit, asi Radio Research Symposium, etc.
- **Radiodays Europe 2015:** egta participated in the planning committees for the 2014 and 2015 editions of RDE, ensuring that issues around radio/audio monetisation are properly represented. egta’s panel on the Monetisation of Connected Audio at RDE - 16 March, 2015, Milan - explored the different business models, advertising formats and sales strategies that are being applied to the growth area of online, connected and mobile audio advertising. Leading players explained how

they are enabling advertisers to reach engaged consumers with relevant advertising products and value-added trading practices.

World Radio Day

This year, for the third time, egta used the occasion of World Radio Day – 13 February, declared by UNESCO at its 36th General Conference in November 2011 – to invite the industry to celebrate the medium. Last year, egta chose to highlight radio's ability to give each listener a unique experience within the theatre of the mind, whilst conveying messages to millions of people simultaneously via one of the few truly mass media available to marketers. Three radio spots commissioned by egta demonstrate this unique capacity of radio to create images on the canvas of our imagination. This year egta further developed the dedicated website www.egtaradioday.com, that highlighted radio's core strengths and compiled a selection of best practice examples related to the promotion of radio as a medium and supporting radio brands.

➤ **Partners' support, press coverage & social media**

The campaign was supported by a number of national and international media associations, who promoted these projects by sending the e-card to their contact lists and/or posting a special statement on their websites. The egta initiative was also mentioned in a number of national and international media as well as commented on social networks.

RadioFocus

The 2014 edition of the RadioFocus database was published on 01/10/2014. This tool compiles valuable insights on the radio advertising landscape across Europe as well as benchmarking information on sales house structure, sales methods and pricing policies for egta member sales houses. In each market section you will find a set of downloadable documents in both XLS and PDF formats:

- **Market overview** - incl. data on equipment penetration, listening time, consumption by platform, etc.
- **Market structure** - incl. audience and market share per station/network.
- **Adspend evolution in all media** - TV, radio, press, cinema, outdoor, Internet.
- **Advertising actors** - adspend of top radio advertising sectors and top radio advertisers.
- **Pricing and sales** - incl. data on c/000, target groups, commission, buyers structure, etc.
- **Advertising placement legislation** - incl. information on advertising time, programme interruptions, compulsory messages, sponsorship, product placement, etc.
- **Audience measurement** - incl. information on technical factors, methodology, hybrid solutions, etc.
- **Sales house structure** - per sales house compilations.
- **Pricing policies and sales methods** - per sales house compilations.

Special projects

- **Online Audio Taskforce:** The mission of this taskforce is to develop, elaborate and establish guidance for the future digital development of the radio businesses, through an exchange of best practice, developments and standards in the monetisation of digital audio. We believe that it should also be tasked with advising egta members on promoting digital to radio buyers and audio to digital buyers as effective advertising solutions.

- Kick-off meeting (November 19, 2014) - the first meeting was called to bring experts together and to give them a forum to exchange knowledge and experience of the digitisation of audio in different markets and to define the critical areas that egta will focus on through 2015 and beyond, including an analysis of the activities that would bring most benefits to members.
- Connected Audio Marketing B2C and B2B Working Group (April 14, 2015 Brussels) - based on an exchange of best practice and concrete examples of work being carried out on different markets in the areas of:
 - B2C: Strategies for the promotion, development and marketing of online audio to existing and new listeners. Building and growing an online audience (scale/advertising inventory)
 - B2B: Practical insights on different sales strategies, structures and competencies, formats, targets, booking systems, programmatic trading etc. Positioning and selling the online audio offer to the market place.

A new website and visual identity:

To be revealed at the AGM 2015: egta invested on a rebranding and a fresh image to position egta as business-oriented, moving away from the status of a *nice-to-belong-to* association to that of a *must-have* business partner:

- a. The morphing of the logo, which started at egta's 40th anniversary ended with a fresh new look in time for this year's AGM.
- b. The project for a new website and unique platform came to fruition. The new platforms will be launched at the AGM in Budapest and be further built upon over the summer 2015.

Focus on the new website and platforms:

- **Objectives:** our objective is to further consolidate egta's online tools that were developed over the years. This long-term work is part of wider communication project, aimed at improving the understating of egta's services among its members.
- **The key enhancements and added features include:**
 - The refreshed users' interface will give a better image of egta, reflecting the active and modern role of the association as a key business partner for all its members.
 - The new design: in order to meet the standards of the multi-screen world, egta opted for a responsive web design that will ensure that all information published on its new website can easily travel in the multi-device environment.
 - The modernised structure will increase the visibility of presented information and improve users' experience.
 - The improved search functions (based on tags, keywords and categories) and navigation systems are being designed to streamline members' experiences in egta's online universe;
 - The modernised catch-up platform will provide a unified access to presentations and videos from egta events.

Information currently stored on the egtanet will be integrated in different secured parts of the new website. This crucial modification aims at allowing cross-platform search based on specific topics.

Decision making bodies

Following elections by the Annual General Meeting in Vienna in May 2014, the egta Board composition was composed of 21 members (in alphabetical order):

Claudio Anselmi (Publitalia '80, Italy), Fabrice Mollier (TF1 Publicité, France), Gunnar Petterson (MTG Viasat Group), Wim Frison (VAR, Belgium), Yves Gérard (RMB, Belgium), Lazaro Garcia Herrero (Publisespaña, Spain), Max Hamberg (TV4, Sweden), Malte Hildebrandt (SevenOne Media, Germany), Claudia Ion (Dogan Media, Romania), Jan Isenbart (IP Deutschland, Germany), Ludger Lausberg (BRmedia, Germany), Paolo Lutteri (Rai Pubblicità, Italy), Peter Mulder (SBS Broadcasting, The Netherlands), Geraldine O'Leary (RTÉ, Ireland), Sergey Piskarev (Gazprom-Media, Russia), Franz Prenner (ORF-Enterprise, Austria), Heikki Rotko (MTV, Finland), Florian Ruckert (RMS, Germany), Martin Schneider (publisuisse, Switzerland), Erkin Zincidi (Doğan Media, Turkey), Walter Zinggl (IP Austria). Non-European observer to the Board: Jean Mongeau (Radio Canada & CBC, Canada) and Khalik Sherrif (etv).

The Executive Committee has since then been composed of: Franz Prenner (President), Heikki Rotko (Past President), Jan Isenbart (President Elect), Martin Schneider (Vice-President), Sergey Piskarev (Vice-President), Florian Ruckert (Vice-President), Paolo Lutteri (Vice-President) and Wim Frison (Treasurer).

➤ Past board meetings

- 22 May 2014, Vienna, back to back with the Annual General Meeting.
- 3 October 2014, Reykjavik, back to back with the Annual TV Marketing & Sales Directors Meeting.
- 30 January 2015, Vienna, back to back with the Annual Market Intelligence Meeting (MIM).

Most of the Board members were also present on 23 April at the first edition of the Top Management Visit Cycle in London.

FUTURE ACTION PLAN (RADIO DEPARTMENT)

Upcoming projects in 2015-2016 for the Radio department

- The **annual radio meetings**: Market Intelligence Meeting, Annual General Meeting, Marketing & Sales Meeting as well as possible workshops and working groups targeted to members' needs.
- **Online Audio Taskforce** - after the kick-off meeting in November 2014, egta will continue its work with the taskforce throughout 2015.
- **Training course dedicated to monetization of online audio**: For limited group of 20 managers, responsible for revenue strategies; heads of departments or teams and regardless of their title, people who have a deep knowledge and understanding of their company's digital strategy, structure and priorities, as well as the authority to talk about it and to suggest and implement change as a result of this interactive training session. To learn about the latest developments, the rationale and language of digital marketing and how best to apply it to audio.
- **Study Trip to New York** - building on the success of the first radio study trip to Silicon Valley (2013), egta will take a limited group of 20 senior executives to New York to harness new opportunities and to benchmark European trade and marketing practices against American expertise.
- **Specialised publications** - reference publications on the radio/audio advertising industry – topics to be announced, e.g. sales methods, programmatic trading, online audio monetisation strategies, etc.
- **White papers and reports** on Radio subjects - to disseminate knowledge and raise awareness.
- **Advocacy of the industry at large.**

