

Arbeitsgemeinschaft Media-Analyse e.V.

EU population and younger target groups in the german radio survey

Experiences and outlook

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ma 2009 Radio I (March 2009)

- **Second radio publication** based on an **expanded planning base**

Request of the advertising industry



Gradual and gently transition in the integration of new target groups



- **Official ma radio universe 2009**

German-speaking residential population from age of 10 year

Innovations

Changes from the ma 2008 Radio II (July 2008)

- Expansion of the population by EU-Citizens from the age of 14 living in Germany
- Integration of children between the ages 10 and 13 of the ma dataset 2008: 2.8 Mio.
- New requirements for weighting and projection from the official statistics

Requirements

Methodological requirements from the ag.ma committees

- Compatibility of reach figures to the previous radio reach figures
- Maintenance of the methodological ma standards
- Consideration of budget restrictions

Integration EU-Citizens 14 +

-  Austria
-  Belgium
-  Bulgaria
-  Cyprus
-  Czech Republic
-  Denmark
-  Estonia
-  Finland
-  France
-  Germany
-  Greece
-  Hungary
-  Ireland
-  Italy
-  Latvia
-  Lithuania
-  Luxembourg
-  Malta
-  Netherlands
-  Poland
-  Portugal
-  Rumania
-  Sweden
-  Slovakia
-  Slowenia
-  Spain
-  United Kingdom

- There are **enough data in the official statistics** to determine the size and structure of the population:
 - ➔ for sample allocation, weighting and projection
- Over 90% of the **EU-Citizens speaks german**:
 - ➔ no foreign-language interviews are required

**Direct integration of EU-Citizens 14 +
to the ma Radio**

Integration of the 10 to 13-year-olds



Because

- **Legal regulations:** parental consent is required
- **Method:** age-appropriate interview had to be developed and specially trained interviewers had to be used

Interview of

- ➔ Children's media usage
- ➔ Statistical information on the household by parents / legal guardians



Implementation not possible at
ma Radio – therefore

**Separate CATI-Survey of 1.867 children
parallel to the ma Radio**

Four different populations were supposed to be made analyzable:

Request of agencies/advertisers and radio market

- Germans and + EU-Foreigners from the age of 14 (official ma population)
- Germans + EU-Foreigners from the age of 10
- Germans from the age of 14
- Germans from the age of 10

➔ Extraordinary effort of data processing and control evaluations

> postponement of the publication date by four weeks

CAUTION: possibility of comparison is restricted !

WHY limited?

	ma 2007 Radio II	ma 2008 Radio II
Sample	Germans from the age of 14	Germans and EU-Citizens from the age of 14: ma Germans and EU-Citizens from the age of 10-13: parallel study
Survey	<u>German speaking resident population:</u> Germans EU-Citizens Non-EU-Citizens	
Projection	to Germans	Germans and Non-EU- citizens to Germans EU-citizens to EU-Citizens
Base	TZD	Microcensus 06

ma 2008 Radio II

Potential of different populations

- Germans + EU-Citizens from 14 years: **67.026 mio**
- Germans + EU-Citizens from 10 years: **69.828 mio**
- Germans from 14 years: **64.871 mio**

**Expansion of the projection potential
to round about 70 mio persons**

Reference: MC 06

Change in the potential of populations: demography (MC 06)

	ma 2008 Radio I	ma 2008 Radio II		
	German 14+ (mio)	German 14+ (mio)	Index (ma 2008 I = 100)	Difference (abs.)
Total	64,818	64,871	100	0,05
Gender				
Men	31,398	31,463	100	0,07
Women	33,420	33,408	100	0,01
Homekeeper	35,437	35,970	102	0,53
Main earner	35,44	35,970	101	0,53
Age				
14-19 years	5,221	5,112	98	0,11
20-29 years	8,362	8,483	101	0,12
30-39 years	10,118	9,659	95	0,46
40-49 years	12,18	12,347	101	0,17
50-59 years	9,424	9,854	105	0,43
60-69 years	9,827	9,436	96	0,39
70 years +	9,686	9,981	103	0,30

➔ Age structure: less population from the age of 14 to 49 years
Impact on listenership!



Change in the potential of populations: regions (MC 06)

	ma 2008 Radio I	ma 2008 Radio II		Difference (abs)
	German 14+ (mio)	German 14+ (mio)	Index (ma 2008 I=100)	
Total	64,818	64,871	100	0,05
Federal states				
<i>Nielsen I</i>	10,438	10,451	100	0,01
Schleswig-Holstein	2,271	2,270	100	0,00
Hamburg	1,303	1,331	102	0,03
Niedersachsen	6,354	6,348	100	0,01
Bremen	0,510	0,501	98	0,01
<i>Nielsen II</i>	13,813	13,842	100	0,03
<i>Nielsen IIIa</i>	8,677	8,698	100	0,02
Hessen	4,632	4,645	100	0,01
Rheinland-Pfalz	3,209	3,212	100	0,00
Saarland	0,835	0,841	101	0,01
<i>Nielsen IIIb</i>	7,992	7,990	100	0,00
<i>Nielsen IV</i>	9,567	9,659	101	0,09
Berlin Gesamt	2,597	2,593	100	0,00
Berlin West (RT)	1,486	1,474	99	0,01
Berlin Ost (RT)	1,111	1,118	101	0,01
<i>Nielsen VI</i>	5,917	5,870	99	0,05
Meckl.- Vorp.	1,502	1,487	99	0,01
Brandenburg	2,236	2,225	100	0,01
Sachsen-Anhalt	2,178	2,158	99	0,02
<i>Nielsen VII</i>	5,817	5,768	99	0,05
Sachsen	3,755	3,725	99	0,03
Thüringen	2,063	2,042	99	0,02
BRD-West+Berlin-West	51,973	52,115	100	0,14
BRD-Ost+Berlin-Ost	12,845	12,756	99	0,09

Postponement between fed.states

Impact on listenership!



Increased potential due to integration of EU-Citizen + children

INDEX (ma 2008 I = 100)	German 14+	German 14+	German + EU 14+	German + EU 10+
Total	100	100,1	103,4	107,7
Gender				
Men	100	100	104	108
Women	100	100	103	107
Homekeeper	100	102	105	105
Main earner	100	101	105	105
Age				
10-19 years	100	98	100	154
20-29 years	100	101	106	106
30-39 years	100	95	101	101
40-49 years	100	101	105	105
50-59 years	100	105	108	108
60-69 years	100	96	98	98
70 years +	100	103	104	104

➔ Potential increases about ca. 8 Index-points for the total population 10 +

**Different impacts onto
radio stations / programmes!**

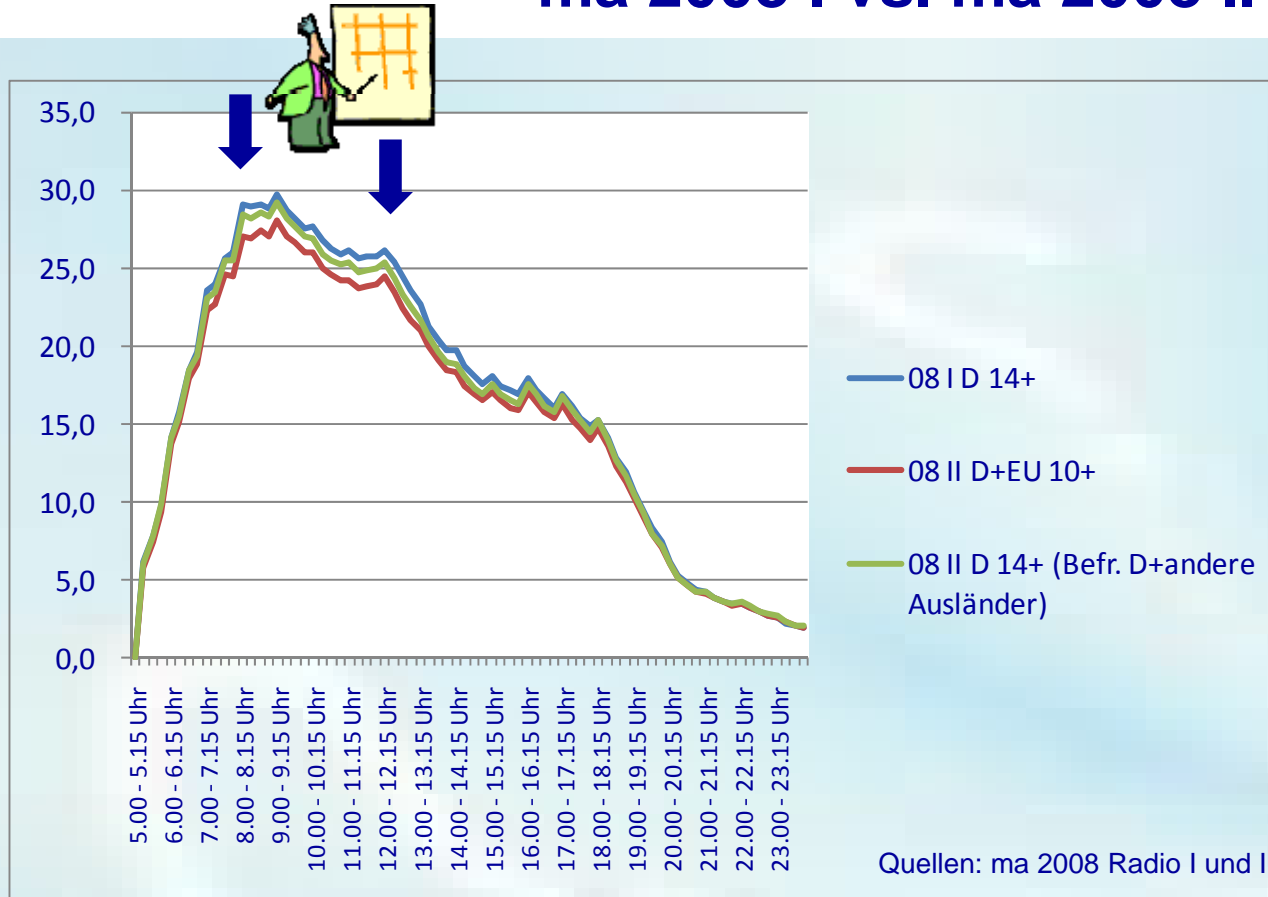


Radio usage

EU-Citizens and children use the radio less intensively than Germans 14 +

	ma 2008 Radio I		ma 2008 Radio II		Children 10-13		German + EU 10+		German + EU 14+		German 14+		EU 14+
	Total		Total										
	%	Tsd.	%	Tsd.	%	Tsd.	%	Tsd.	%	Tsd.	%	Tsd.	%
Total	100,0	64.818	100,0	69.828	100,0	2.802	100,0	69.828	100,0	67.026	100,0	64.871	
Listen to once in a while	99,0	64.177	99,0	69.139	98,4	2.758	99,0	69.139	99,0	66.382	99,1	64.261	
Total audience	93,7	60.704	93,1	65.041	91,1	2.553	93,1	65.041	93,2	62.487	93,3	60.524	91,1
Listeners per day	76,8	49.808	75,6	52.767	60,8	1.705	75,6	52.767	76,2	51.062	76,5	49.597	68,0
Average 6 am-18 pm	28,7	18.630	27,2	18.986	11,1	312	27,2	18.986	27,9	18.674	28,0	18.145	
Listening duration (minutes)		186		176		54		176		181		182	159
Length of stay (minutes)		242		233		89		233		238		238	233

Radio usage over the day: ma 2008 I vs. ma 2008 II



Caution: comparison are possible only for the german population 14 + !!!

- Radio usage remained at the previously reported level
- Population „German + EU 10 +: same curve at a slightly lower level

Radio usage over the day: different populations



- Similar curves during the day by comparison population 10 + and 14 +
- Children on lower level: peak of usage before start of school

New research task

ACTUAL:

- Interviewing of **german-speaking** Non-EU-Foreigners
- **Projection** of the Non-EU foreigners to the German residential population

ma 2008 Radio II: 1.761 Interviews = 2,8% of the interviewee

- **Problem: non-german-speaking** Foreigners don't use german media and are not relevant for the advertising industry and they can't follow the interview.

SOUGHT:

- **Methodologically correct projection** of foreigners to **german-speaking** Foreigners

New research task

- Total population 14 + 71,17 mio.
- Germans 64,87 mio. (91,1%)
- EU 26-Citizens 2,15 mio. (3,0%)
- Non-EU-Citizens 4,15 mio. (5,8%)

- No adequate information concerning german-speaking foreigners from the official statistics

- But from the Socioeconomic Panel: correlation between „able to speak german“ and „educational qualification“

... therefore ...

New research task

HYPOTHESIS:



- If „german language“ proficiency is correlated with „educational qualification“ (in Germany or the home country), ...
... then the ma should have previously collected a number of individuals without school diploma that was significantly below average.

Results of the correlation

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„school diploma“ / „able to speak german“

Befragter ist "Nicht EU-Ausländer"	MZ 2006	ma 2008 PT II	ma 2008 PT II	ma 2008 RT II	ma 2008 RT II
	%	%	Fälle	%	Fälle
Basis: ungewichtet	100	100	1241	100	1761
besucht zur Zeit allg.Schule, Berufsschule, Hochschule	15.4	17.4	216	25.8	454
ohne Schulabschluß	20.7	7.9	98	2.9	51
Haupt-/ Volksschulabschluß ohne Lehre	21.7	20.1	249	22.7	400
Haupt-/ Volksschulabschluß mit Lehre	12.3	27.5	341	11.2	197
weiterführende Schule ohne Abitur, Mittlere Reife	13.1	16.6	206	17.3	305
Fach-/ Hochschulreife ohne Studium	7.5	3.5	44	8.5	149
Fach-/Hochschulreife mit Studium	9.5	7.0	87	11.6	205

➔ RESULT:

Non-EU-Foreigners without school diploma are disproportionately smaller in comparison of the official statistic: f2f survey (print) and CATI survey (radio)

New research task CONCLUSION (1)

- „Educational qualification“ can serve as an estimator for „able to speak german“ at Non-EU-Foreigners

NEXT STEP:



- „German-speaking Non-EU-Foreigners“ can be projected to „Foreigners with school diploma“



Potentials:

Non-EU-Foreigners) 14 +

Non-EU-Foreigners 14 + with school diploma:

4,15 mio.

3,30 mio.

Correlation „school diploma“ / „able to speak german“ – conclusion (2)

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Respondent is „Non-EU-Foreigner“	MC 2006	ma 2008 Presse II		ma 2008 Radio II	
	%	% unweighted	% transformed	% unweighted	% transformed
Base	100.0	100.0	100.0	100.0	100.0
Men	50.9	52.1	51.3	45.4	46.0
Women	49.1	47.9	48.7	54.6	54.0
Age					
14 - 19 years	10.3	14.2	17.3	17.1	25.2
20 - 29 years	21.4	23.9	22.3	21.9	19.5
30 - 39 years	25.5	27.3	26.4	28.6	24.3
40 - 49 years	16.6	17.2	17.8	15.2	15.3
50 - 59 years	14.3	9.4	9.0	8.9	8.3
60 - 69 years	9.2	5.9	5.4	5.7	5.1
70 years and older	2.6	2.2	1.7	2.7	2.3
Occupation					
In education, scholar, student	15.5	17.1	19.6	24.7	30.6
Employed	39.7	58.9	56.0	48.1	43.5
Retired person, pensioner	8.0	6.8	5.9	3.0	2.3
Not working / without a job	36.9	17.2	18.5	24.3	23.6

➔ **Foreigners must also be taken into account in the weighting process because CATI (radio) as well as face-to-face (print) allocate differently**

Summary

- **EU-Foreigners**

Projection of all EU-Citizens from 10 + to „EU total“
without discounting factor

- **Non-EU-Foreigners**

Projection will only be performed to Non-EU-Foreigners
10+ / 14+ with completed schooling

Realisation
at the earliest possible reporting date in 2010.

A conceptual image showing a small green seedling with two leaves growing out of a globe of the Earth. The globe is shown from a perspective that highlights the continents and oceans. The text 'What is the solution in your country?' is overlaid in blue on the globe.

What is the solution in
your country?