ag.ma

Arbeitsgemeinschaft Media-Analyse e.V.

Where to, Radio?
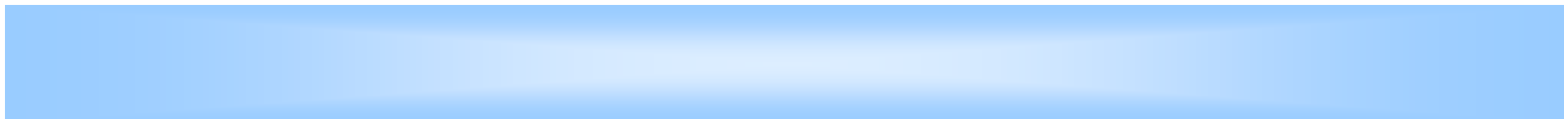# News from German Radio Research

Henriette Hoffmann, RMS Radio Marketing Service GmbH & Co. KG, Germany
(Elected Radio Market Researcher in the ag.ma)

Christiane Korch, Media-Micro-Census GmbH, Germany
(Department Head Radio, TV & Poster)

EMRO Annual Conference

May 21-25, 2011

Krakow, Poland

ma 2011 Radio I

- Differentiation of planning data according to workdays and weekend days
- More precise calculation of advertisement exposure opportunity

ma 2010 Radio I

- Integration of German-speaking non-EU foreigners

+ approx. 4 million people

ma 2008 Radio II

- Integration of EU citizens and children aged 10 to 13
- Changed target requirements (for the first time directly from the MC)

+ approx. 5 million people

ma 2007 Radio II

- Changes in the MC 2005 (key date survey for the all-year survey)

ma 2011 Radio I
- Differentiation of planning data according to workdays and weekend days
- More precise calculation of advertisement exposure opportunity

ma 2010 Radio I
- Integration of German-speaking non-EU foreigners

+ approx. 4 million people

ma 2008 Radio II
- Integration of EU citizens and children aged 10 to 13
- Changed target requirements (for the first time directly from the MC)

+ approx. 5 million people

ma 2007 Radio II
- Changes in the MC 2005 (key date survey for the all-year survey)
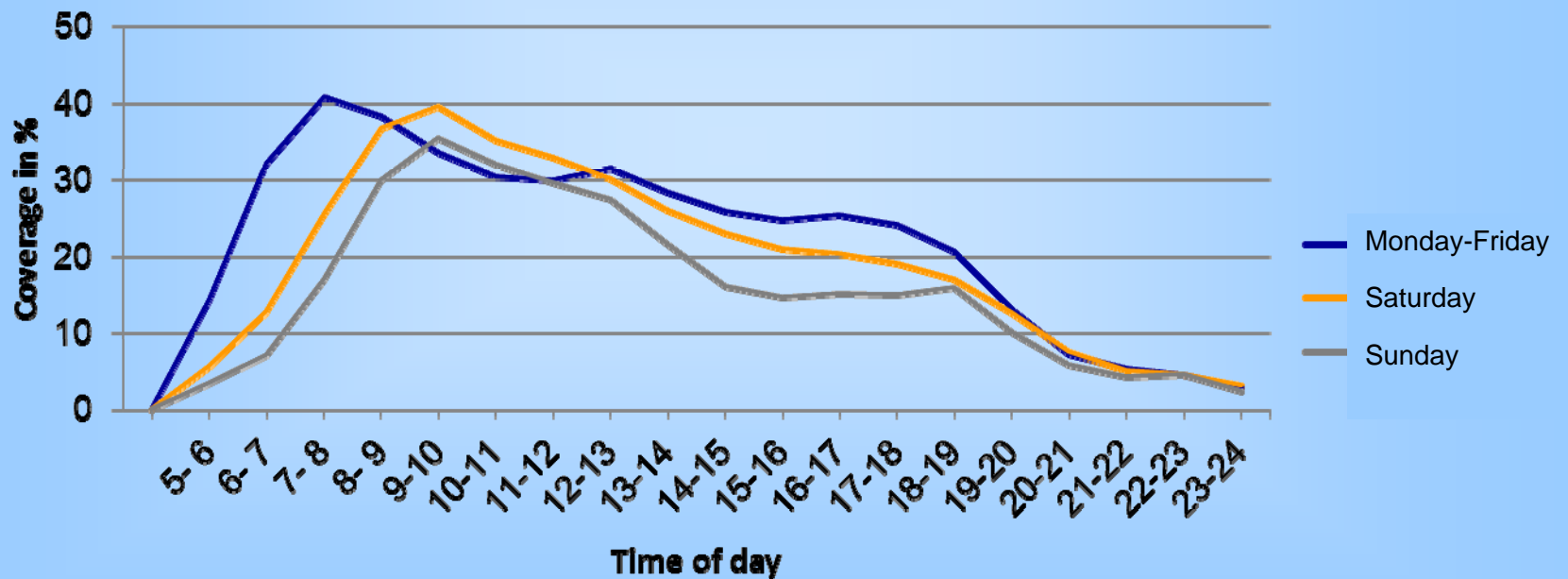
Differentiation of planning data

Starting point

Advertising industry

- Suggestion in 2006: Planning data for Monday through Friday, Saturday and Sunday

ag.ma committees

- Development of the new coverage model

ag.ma members' assembly

- Decision (Nov. 2010): Implementation in ma 2011 Radio I

Differentiation of planning data

Background

Radio usage is different on workdays.

⟶ Many people listen to the radio later on weekends.

Monday-Friday

Saturday

Sunday

Source: ma 2010 Radio II, German-speaking population 10+, original data

Differentiation of planning data

Background

Radio usage on the individual workdays shows barely any difference.

Differentiation of planning data

Background

The usage patterns are different.

→ Men use the radio differently …
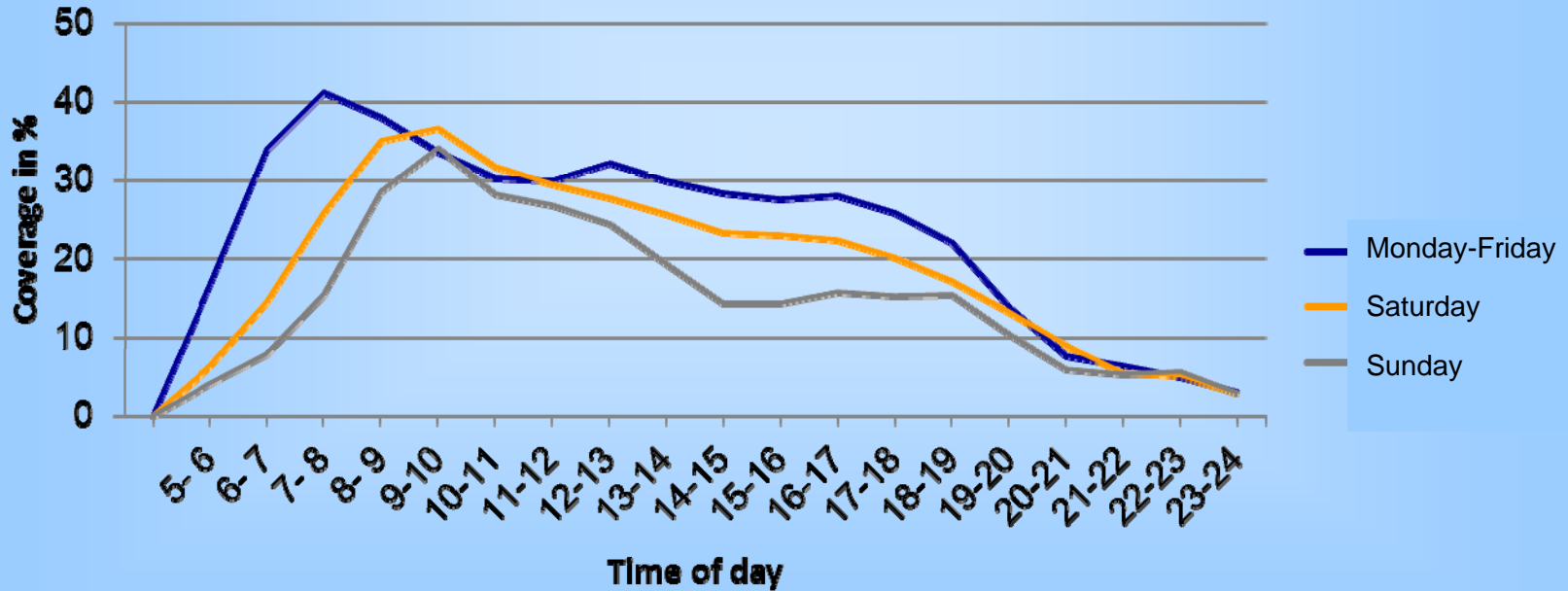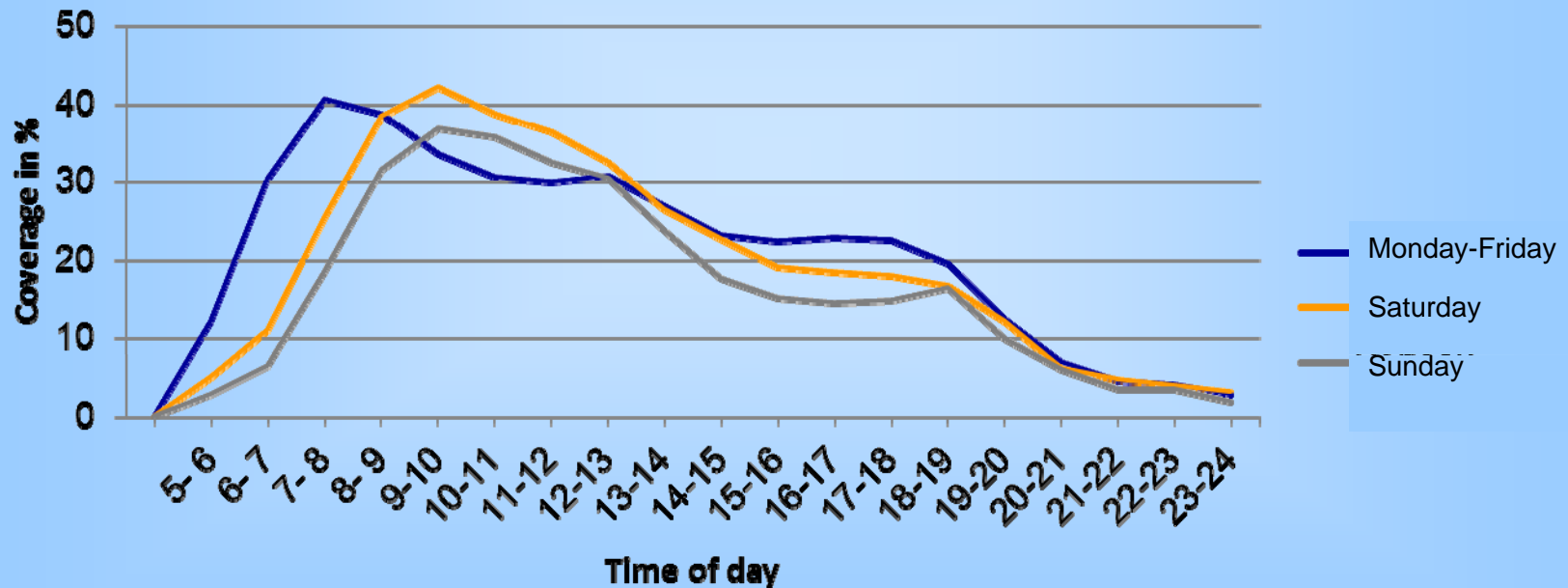

Monday-Friday

Saturday

Sunday

Source: ma 2010 Radio II, German-speaking population 10+, original data, men

Differentiation of planning data

Background
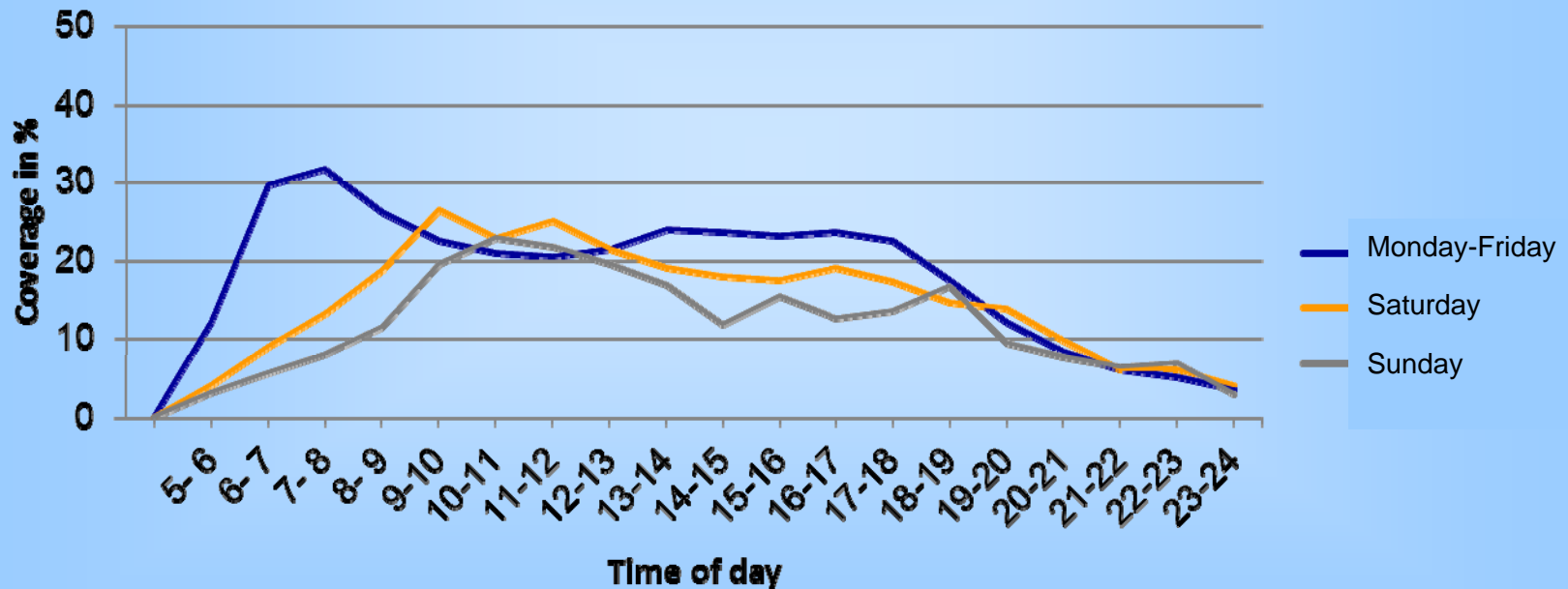
The usage patterns are different.

⟶ … than women.

Legend:
- Monday-Friday
- Saturday
- Sunday

(Chart: Coverage in % vs. Time of day, with hourly intervals from 5-6 through 23-24)

Differentiation of planning data

Background

The usage patterns are different.

→ Younger people (aged 14-29) use the radio differently than ...

Source: ma 2010 Radio II, German-speaking population 10+, original data, 14-29 years of age
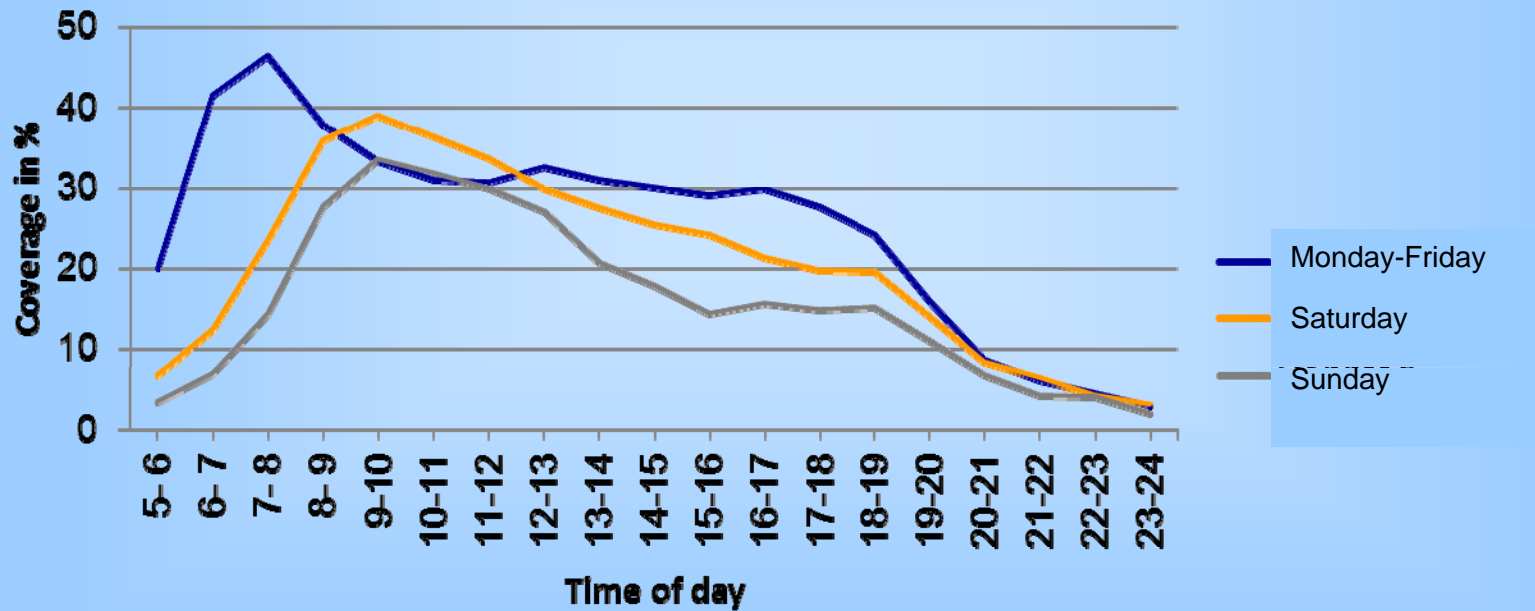
Differentiation of planning data

Background

The usage patterns are different.

→ … people of medium age (aged 30-49).

Source: ma 2010 Radio II, German-speaking population 10+, original data, 30-49 years of age

Introduction of the new coverage model

Objective

- Evolution of the existing calculation method in order to be able to generate weekday-specific p-values (coverages).

Premise

- The previous ma Radio remains a basic component of the new coverage model.
  - No increase of the previous sample size
  - The survey content remains the same

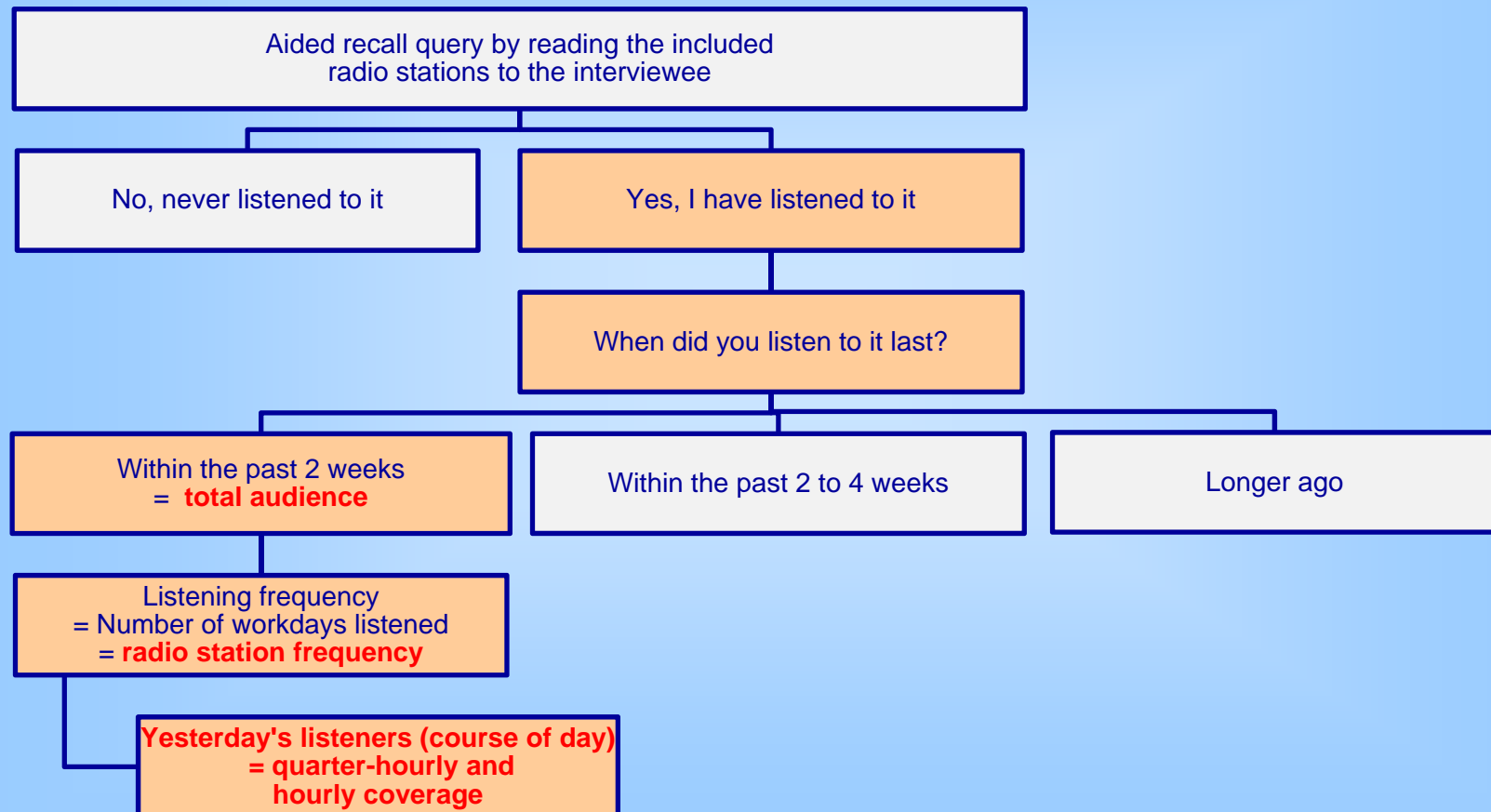# Differentiation of planning data

Brief survey profile of the ma Radio

- **Survey type:** CATI (phone survey)
- **Universe:** German-speaking population aged 10+
- **Sample size:** Approx. 65,000 interviews per year
  Same day distribution
  Regionally disproportionate
- **Sample design:** Random
- **Reporting basis
  for radio stations/
  combinations:** 351 unweighted cases in "total audience"

Differentiation of planning data

ag.ma
Arbeitsgemeinschaft Media-Analyse e.V.

Interview process of the ma Radio

Aided recall query by reading the included
radio stations to the interviewee

No, never listened to it

Yes, I have listened to it

When did you listen to it last?

Within the past 2 weeks
= **total audience**

Within the past 2 to 4 weeks

Longer ago

Listening frequency
= Number of workdays listened
= **radio station frequency**

**Yesterday's listeners (course of day)
= quarter-hourly and
hourly coverage**

Interview process of the ma Radio

Additional relevant questions

Since the question on radio station usage alone is insufficient, additional information is queried:

- Radio usage behavior in general according to time segments

    6:00 – 7:00 a.m.
    7:00 – 8:00 a.m.
    8:00 – 10:00 a.m., etc.

- Demographics, e.g.

    Age
    Gender
    Household size
    Number of children in the household

- Additional characteristics describing the target group

Differentiation of planning data

Why p-values?

- Information that can be read directly from the survey:
    - What radio stations are used by which people on an average day?
    - ➜ Share of interviewees reached with a one-time commercial placement
- Information that cannot be read directly from the survey:
    - How many people who listened to a radio station between 6:00 and 7:00 a.m. today will also use this station tomorrow or the day after tomorrow at that time?
    - ➜ Radio audience achieved after several placements

⬇

Necessity of a special calculation model that provides
usage probabilities (= **p-values**)

Differentiation of planning data

Definition of usage probabilities

Probability of media exposure

Listeners per hour:

- Exposure to at least 15 minutes in one hour of radio programming that includes advertising
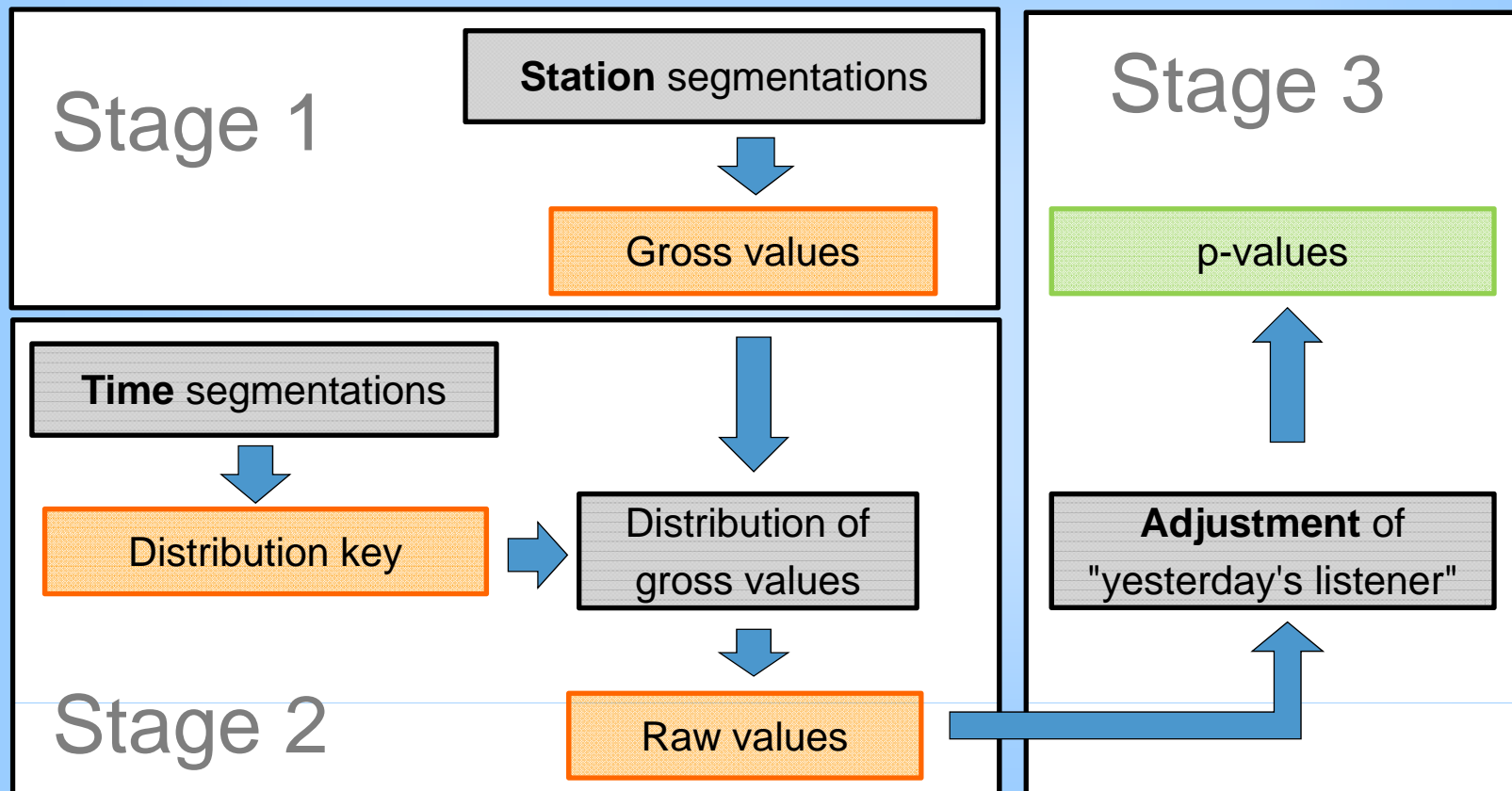
Probability of ad exposure

Listeners per hour:

- Exposure to an average 15 minutes per hour of programming that includes advertising

Differentiation of planning data

Process steps of the new coverage model

Stage 1

Station segmentations

Gross values

Stage 2

Time segmentations

Distribution key → Distribution of gross values

Raw values

Stage 3

p-values

Adjustment of "yesterday's listener"

Result of the new model

- Advertising media units presented in the ma 2011 Radio I

	Monday-Friday	Saturday	Sunday
Individual radio stations	100	99	68
Combinations (incl. summaries and marketer combinations)	105	107	67

- More differentiated, more exact coverage data
- More strategic planning possibilities for radio
- No direct comparability of the old coverage data with the new coverage data

More precision in calculating the probability of ad exposure

Starting point

- Approval of the new calculation of the probability of ad exposure by the 2009 members' assembly of the ag.ma
- Earlier calculation: To all radio stations listened to in a 15-minute period, a full 15-minute period was assigned at the individual station level, regardless of how many radio stations the interviewee listened to during that 15-minute period.

Background

Number of 15-minute periods in which ... radio station(s) was/were listened to

- 1 radio station
- 2 radio stations
- 3 radio stations
- 4 or more radio stations

➞ For each 15-minute period, one radio station is used in 94% of all cases.

➞ Search for a method that takes into account multiple listening processes within one 15-minute period

More precision in calculating the probability of ad exposure

Background

Number of 15-minute periods in which people listened to ... radio stations		Listened to 1 radio station	Listened to 2 radio stations	Listened to 3 radio stations	Listened to 4+ radio stations
Total		94%	4%	1%	1%
Gender	Men	92%	6%	2%	1%
	Women	96%	3%	1%	0%
Age	14-29 years of age	90%	6%	2%	1%
	30-49 years of age	93%	5%	2%	1%
	50+ years of age	96%	3%	1%	0%
Gainfully employed?	Yes	93%	5%	2%	1%
	No	96%	3%	1%	0%

→ The share varies only slightly in terms of different target groups.

New calculation of the probability of ad exposure

For 15-minute periods in which more than one radio station was listened to, the following applies as of the ma 2011 Radio I:

To calculate the probability of ad exposure, the sum of the **shares** of 15-minute periods of radio listening are set in proportion to the total possible number of 15-minute periods.

Change of station-related time spent listening, market shares, ad exposure

Survey of information on radio usage via the Internet (Web radio) – Update

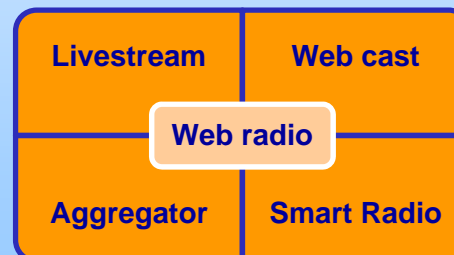# Radio usage via the Internet

New block of questions on radio usage via the Internet (since Sept. 2010)

- Radio usage via PC or notebook
- Radio usage via Internet radio or WLAN radio
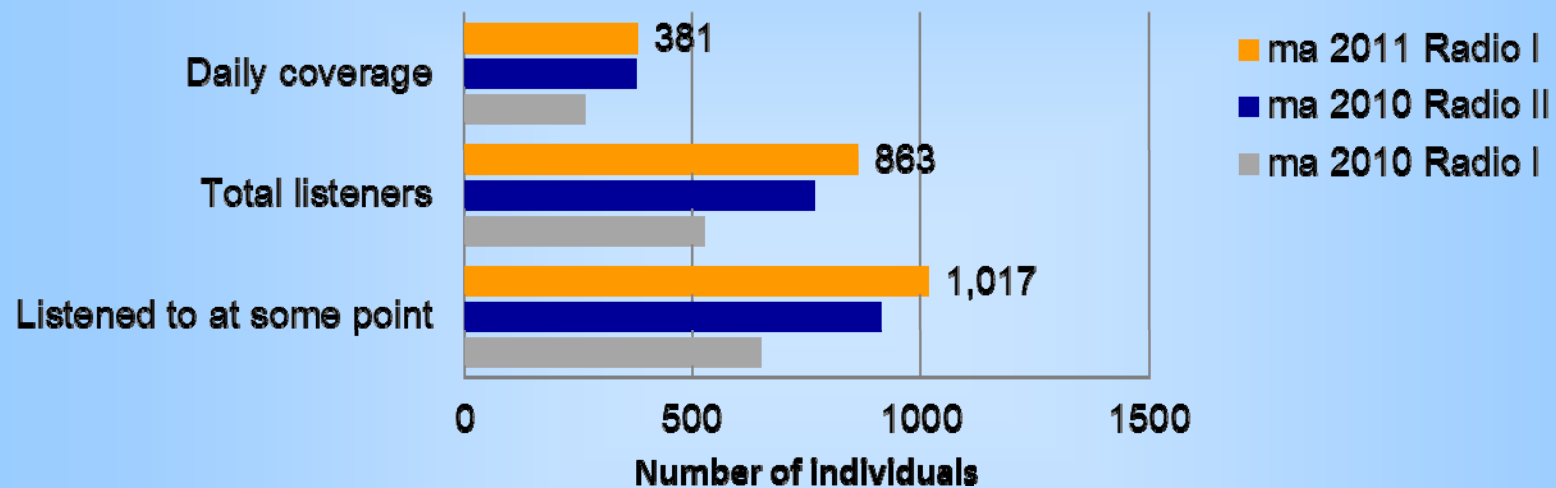- Radio usage via Internet-capable cell phone

+ usage frequency
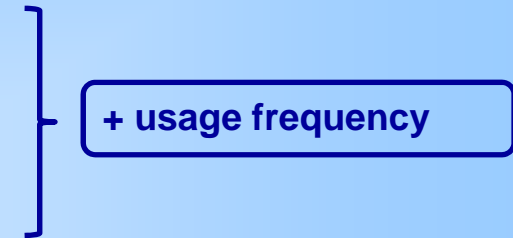
→ Evaluation will be completely possible starting with the ma 2011 Radio II (July 2011)

Coding of open mentions was refined

Livestream	Web cast
Aggregator	Smart Radio

Web radio

ag.ma

Arbeitsgemeinschaft Media-Analyse e.V.

Radio usage via the Internet

Results for Web radio only

Daily coverage: **381**
Total listeners: **863**
Listened to at some point: **1,017**

Number of Individuals

- ma 2011 Radio I
- ma 2010 Radio II
- ma 2010 Radio I
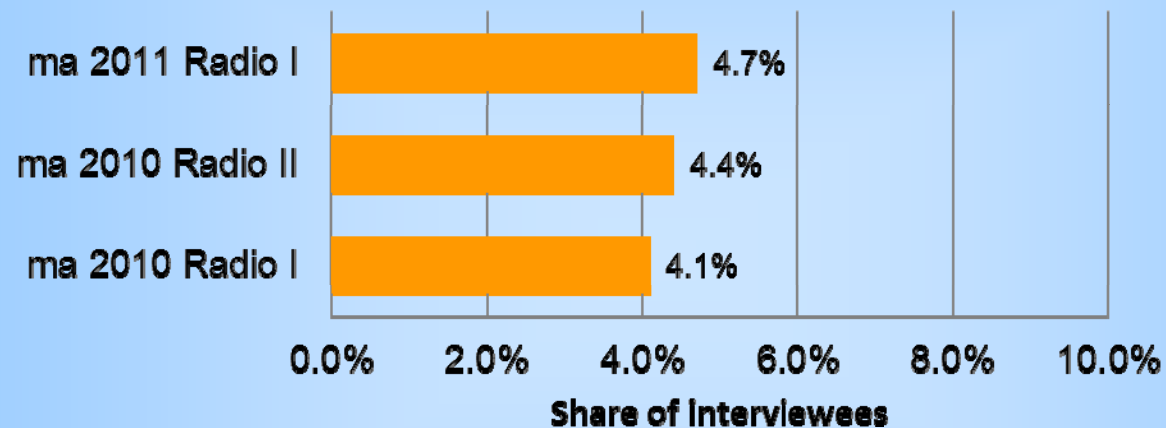
- Only 1.4% of the German-speaking population over the age of 10 have listened to a pure Web radio station.

- Web radio landscape is strongly fragmented .

- There are still many individual mentions.

Source: ma 2010 Radio I and II, ma 2011 Radio I, German-speaking population 10+, Mo-Su; potential: 73,623 thousand persons

Results regarding possession of an Internet radio device in the household

ag.ma

Arbeitsgemeinschaft Media-Analyse e.V.

Results on the usage frequency of radio programs over the Internet via PC/notebook

Source: ma 2011 Radio I, German-speaking population 10+
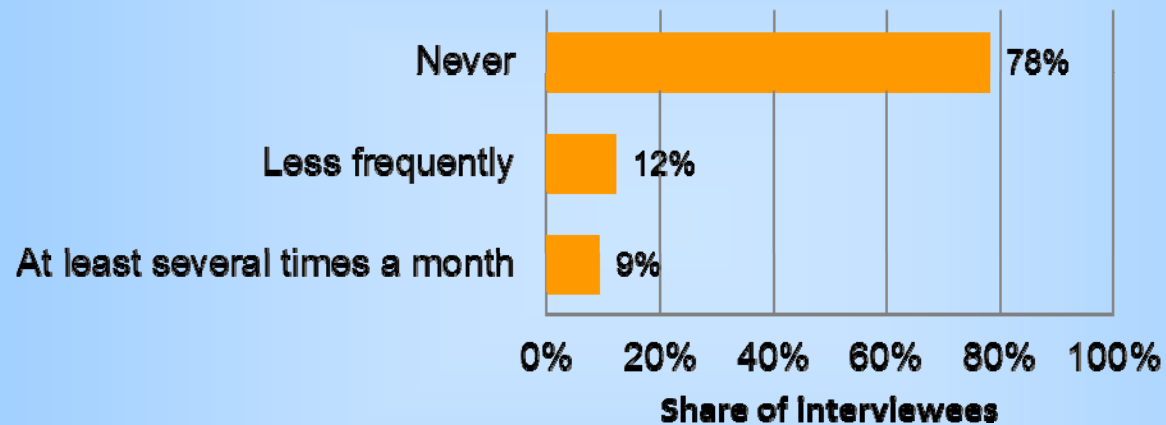
Summary

Planning involving Monday through Friday, Saturday, Sunday…

… represents a great change for radio planners in Germany.

… facilitates even more effective planning and implementation of radio campaigns.

The topic of Web radio …

… is being considered in the ma Radio; however, actual Web radio usage by the population is still limited right now.

Thank you for your attention!