



# Strategic – Music survey

Updated February 2020

## Sample and basis of this report

This is the third of three samples generated from an on-line panel.

Comparisons with older samples (CATI) are limited however individual samples are compared with individual month samples (300) and 'rolling' 600 samples. This update is based on the results of the full 900 sample.

There is little significant change between the WHK (cume) results in all three monthly samples however the variations in TSL means that some of the share results do vary from period to period.

The main comparison in this report is the 'full' sample of 900 people with the 2019 sample of 600 reported in December.

For simplification, comparisons and trends in this report now compare online samples with online samples

### Life Radio:

As expected, there is little substantial change in these latest results, however results for Life Radio are positive. There has also been growth for Krone Hit as it seems that the station is attempting to broaden its music appeal to older listeners.

**WHK** remains stable compared to the last result

**Marktanteil** is slightly better with improvement in the 25-34 age group

**Heavy (2+) listener share** is also better and is now around 20%

**Conversion** remains low at 36% largely because of an underperforming morning show and as a result making it more difficult to dominate share, especially during the day.

The age (WHK) profile for Life Radio is still centred in 25-44 however on these results listening share (Marktanteile) improves with a more even 25-44 profile

Overall and morning show listening is still dominated by Ö3 - as a result most related images are also dominated by Ö3

Issues for Life Radio:

Results		Consequence
Conversion remains low at 36% i.e. the majority of the station's cume (WHK) is made up of secondary listeners		Listening can be overly impacted by the listening patterns of the station's P2 listeners - mainly changes on Ö3
Morning show share shows some improvement since the last result, but share is still below overall D/P share		Better Morning show share will lead to stronger conversion and more stable share for Life Radio
P1 Morning Show images (Best Morning Show) is better but is still low at 53%		P1 listeners are the 'barometer' for the development of the Life Radio show
Retention is lower in daytime - Life Radio must improve daytime retention or attract more daytime (heavy) listening as morning show does not deliver enough listening to days		The objective is to improve conversion - <b>and</b> retention of existing listeners

# Life Radio - positioning



- Images most associated with Life Radio:

<b>Total</b>		
<b>Music</b>		<b>Morning Show</b>
Mix Old & New Music Musicmix - nice memories Up to date and 80s / 90s	Ö3 still leads in these categories however Life Radio has a strong association	Morning Show Fun / entertaining Reliable traffic Morning show good info Morning Show Best
<b>Life Radio WHK</b>		
<b>Music</b>		<b>Morning Show</b>
Music Mix (good memories) Best Music 90s 80s Variety 2000s and songs from past 10 yrs improves	Most music images are unchanged since November. "Recommend to a friend" improves	Fun/entertaining MoShow improves - however still slightly below Ö3.

### **Ö3**

While Ö3 is still the dominant station the individual monthly results show a better result for Ö3 in November - the latest result is back at the previous (October) level which means that a number of results for Ö3 are a little lower.

Ö3 still dominates morning show listening and images - what is interesting however is that the station has a dominant position for traffic and weather - both of these are very high on 'importance' for listeners in the Life Radio target.

Music images and associations for Ö3 remain broad however Life Radio is in a relatively good position relative to Ö3 for 'mix', 90s and 80s music.

### **Krone Hit**

Increases for Krone in November are still consistently in these latests results. Krone competes most directly with Ö3 as the choice for new music, current hits (hits from today) Morning Show appeal is growing among the 14-34 age group.

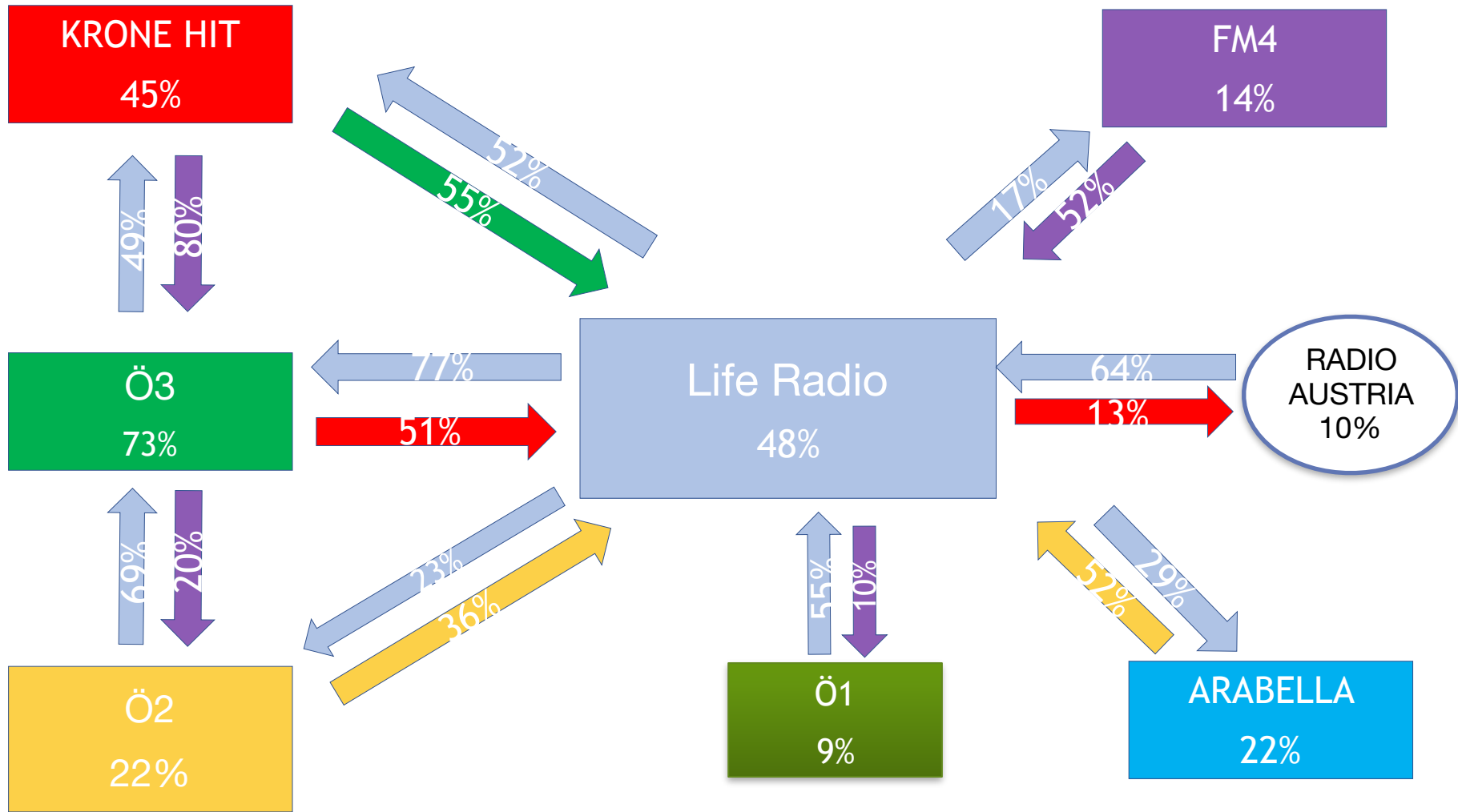
### **Radio Arabella**

Results for Radio Arabella are stable - the station has an older profile and images are strongest among 50+ listeners. Growth by Radio Austria is likely to impact Radio Arabella more than Life Radio

# *Tracking overview*

# CROSS-CUME

2020

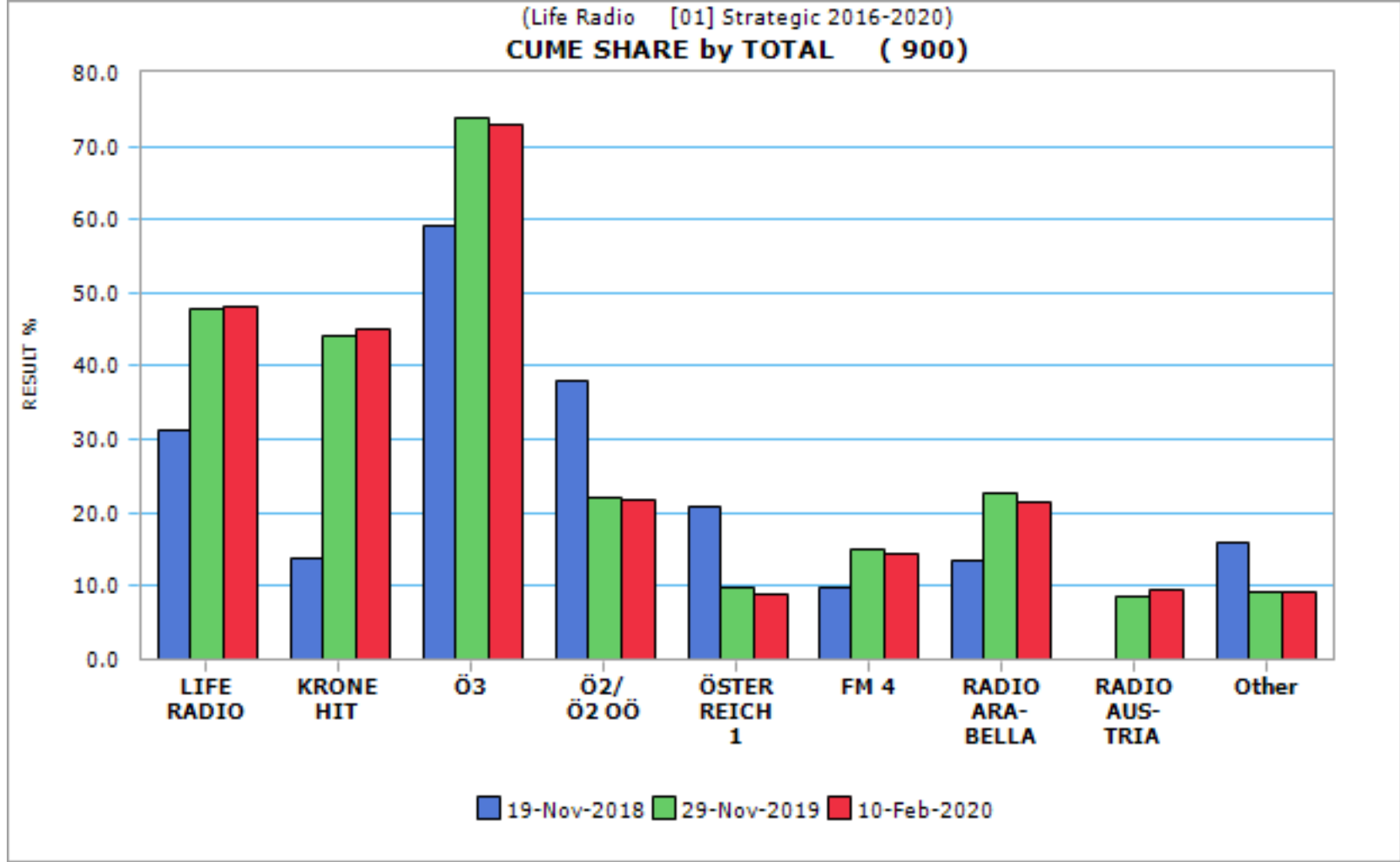




# CROSS-CUME: February 2020

	KRONE HIT	LIFE RADIO	Ö3	Ö2/ Ö2 OÖ	ÖSTER REICH 1	RADIO ARABELLA	FM 4	RADIO AUSTRIA
CUME: KRONE HIT		55	80	19	7	25	15	13
CUME: LIFE RADIO	52		77	23	10	29	16	13
CUME: Ö3	49	51		20	8	20	14	10
CUME: Ö2	40	52	66		16	31	16	15
CUME: ÖOSTEREICH 1	33	55	64	38		35	38	20
CUME: RADIO ARABELLA	52	65	67	31	14		17	21
CUME: FM4	46	52	70	24	24	26		19
CUME: RADIO AUSTRIA	61	64	76	34	18	48	29	

e: all cume numbers have increas

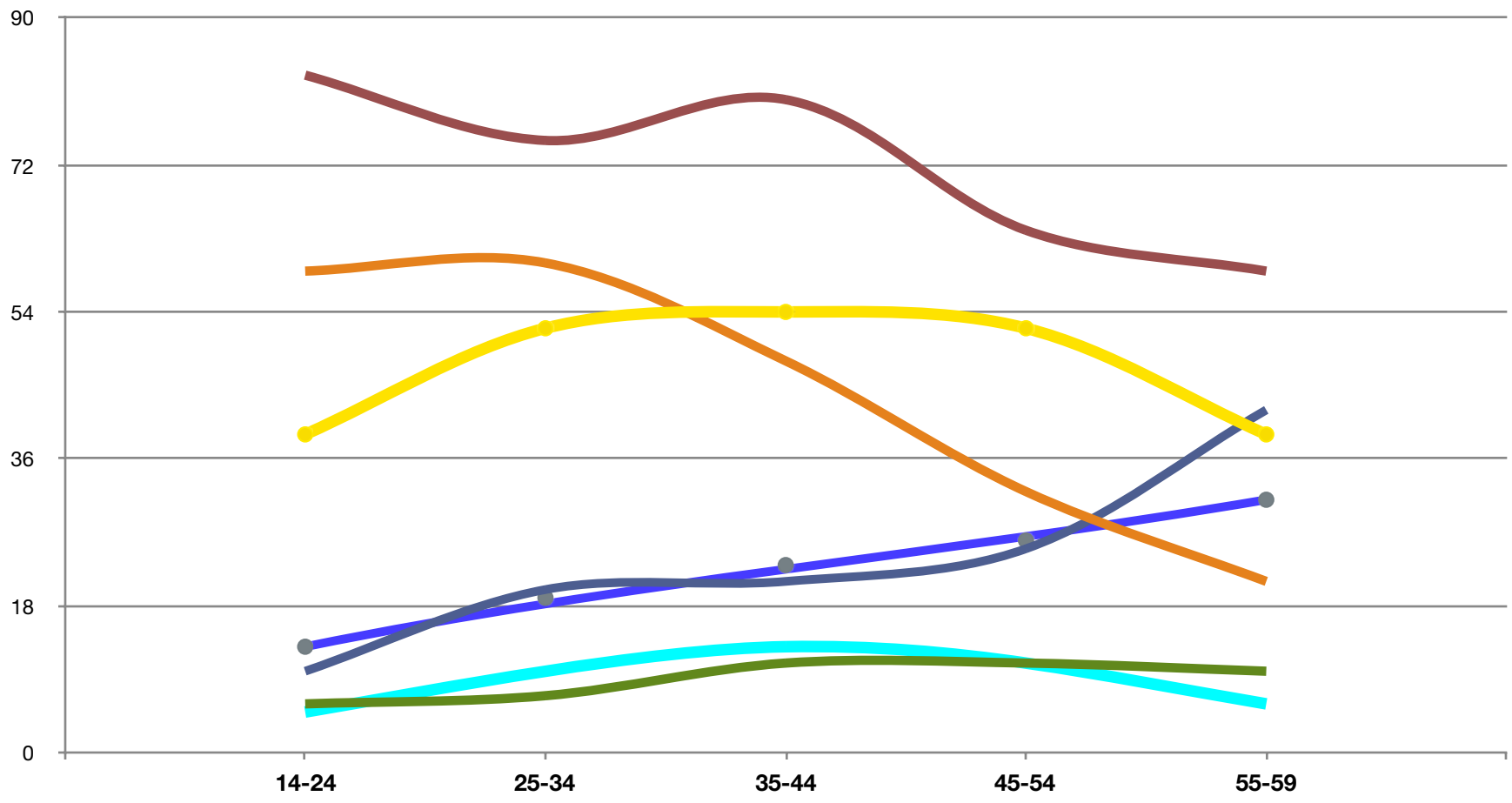


The 2018 result is still CATI based however the elements of this survey period are very consistent

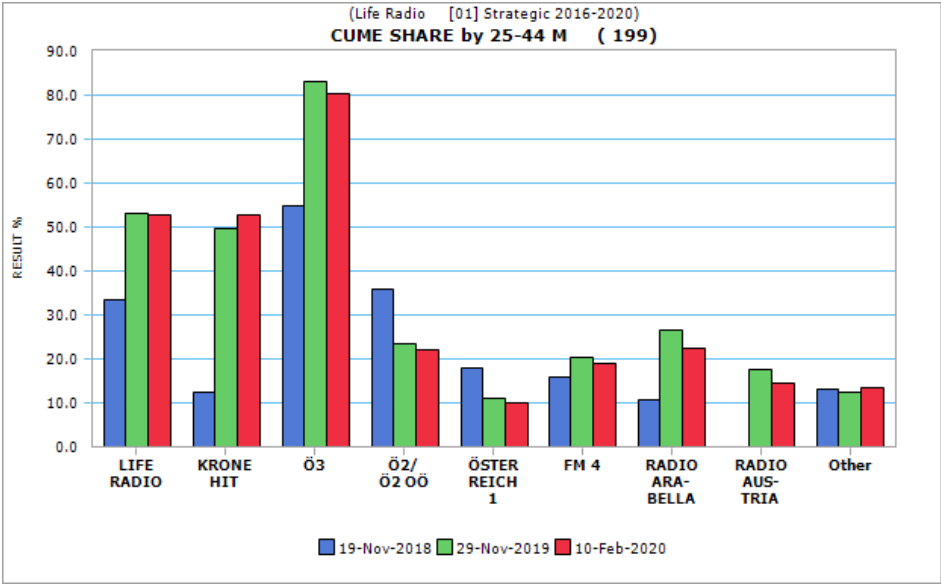
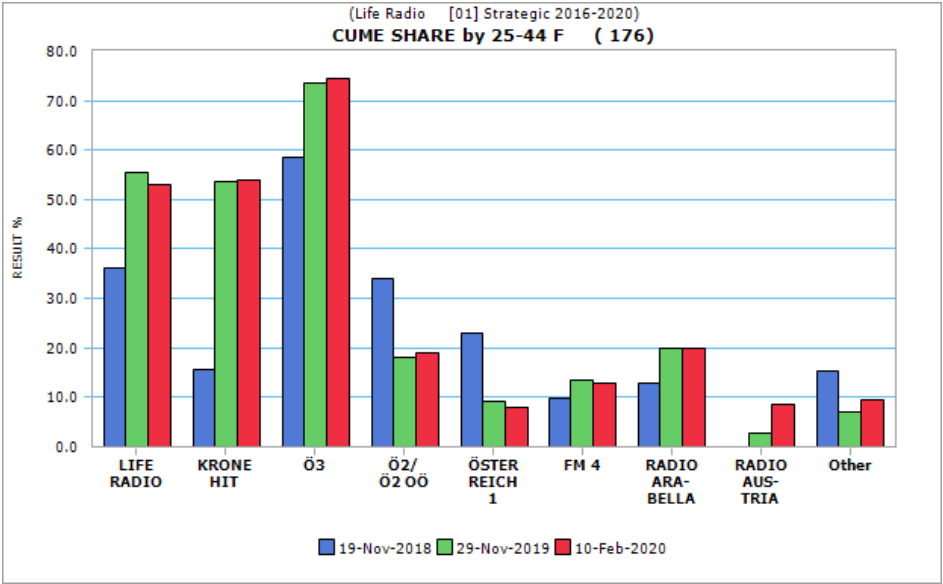
# WHK/CUME: age groups



(Feb 2020)



◆ LIFE RADIO    
 — Ö3    
 — KRONE HIT    
 — Ö2/Ö2 OÖ    
 — ÖSTER REICH 1    
 ● RADIO ARA-BELLA    
 — RADIO AUSTRIA



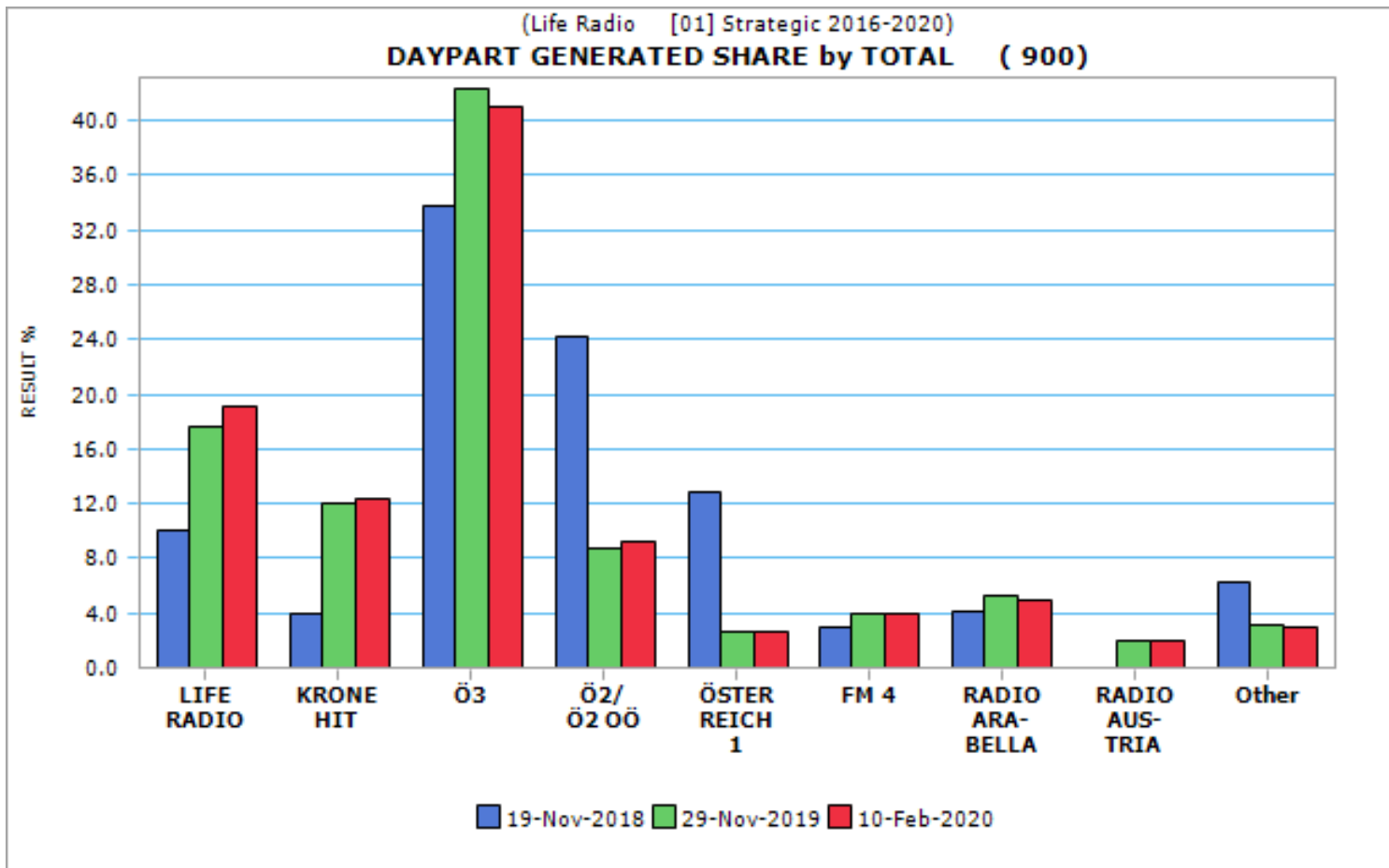
Ö3 cume is greater among males than females. Both Life Radio and Krone Hit attract substantial listening in the 25-44 age groups.

Life Radio cume in this age group is evenly divided between males and females

# listening share

## (Marktanteil)

# listening share: total

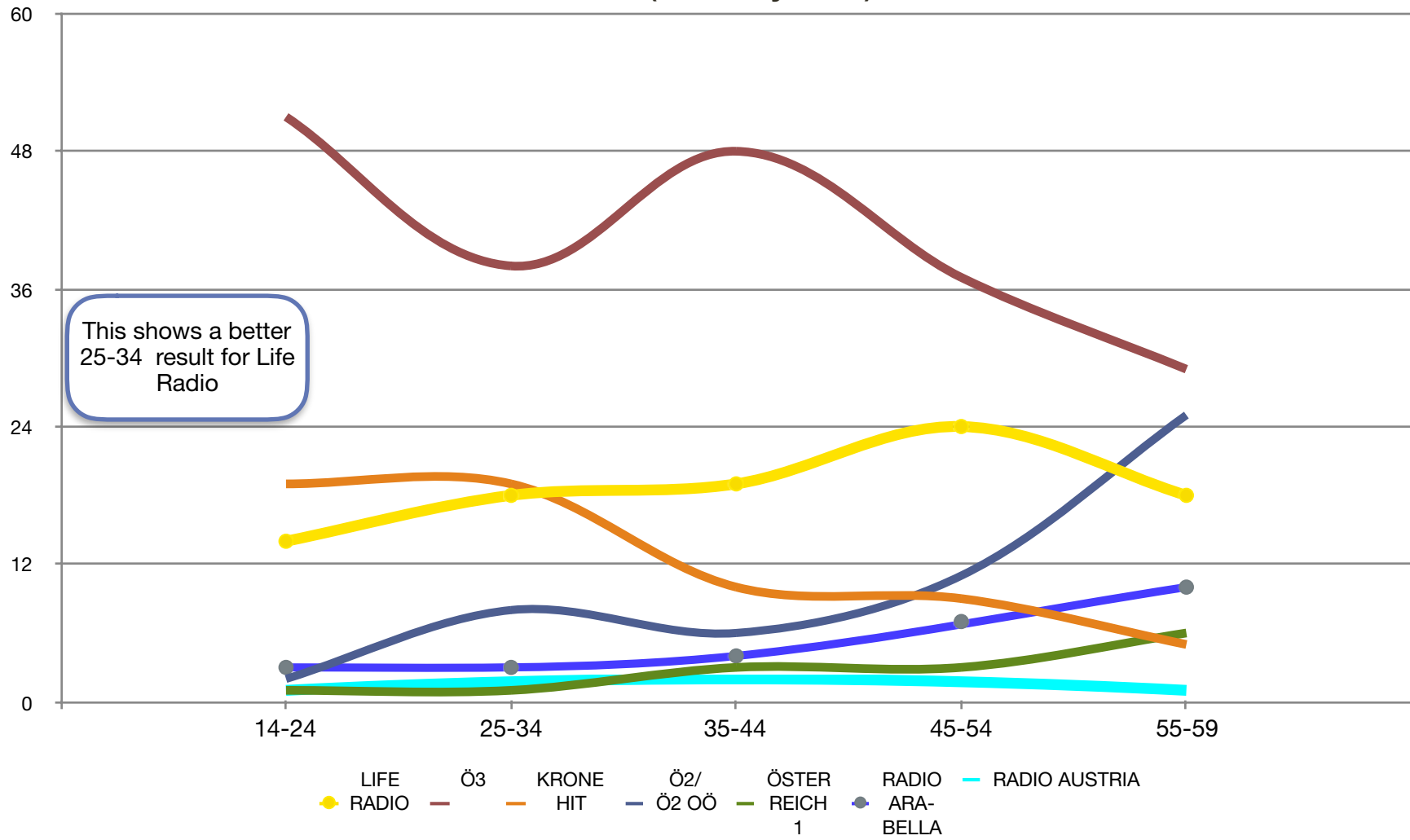


Although Life Radio share improves there is still a massive gap between Life and Ö3 with more than double the Life Radio Share

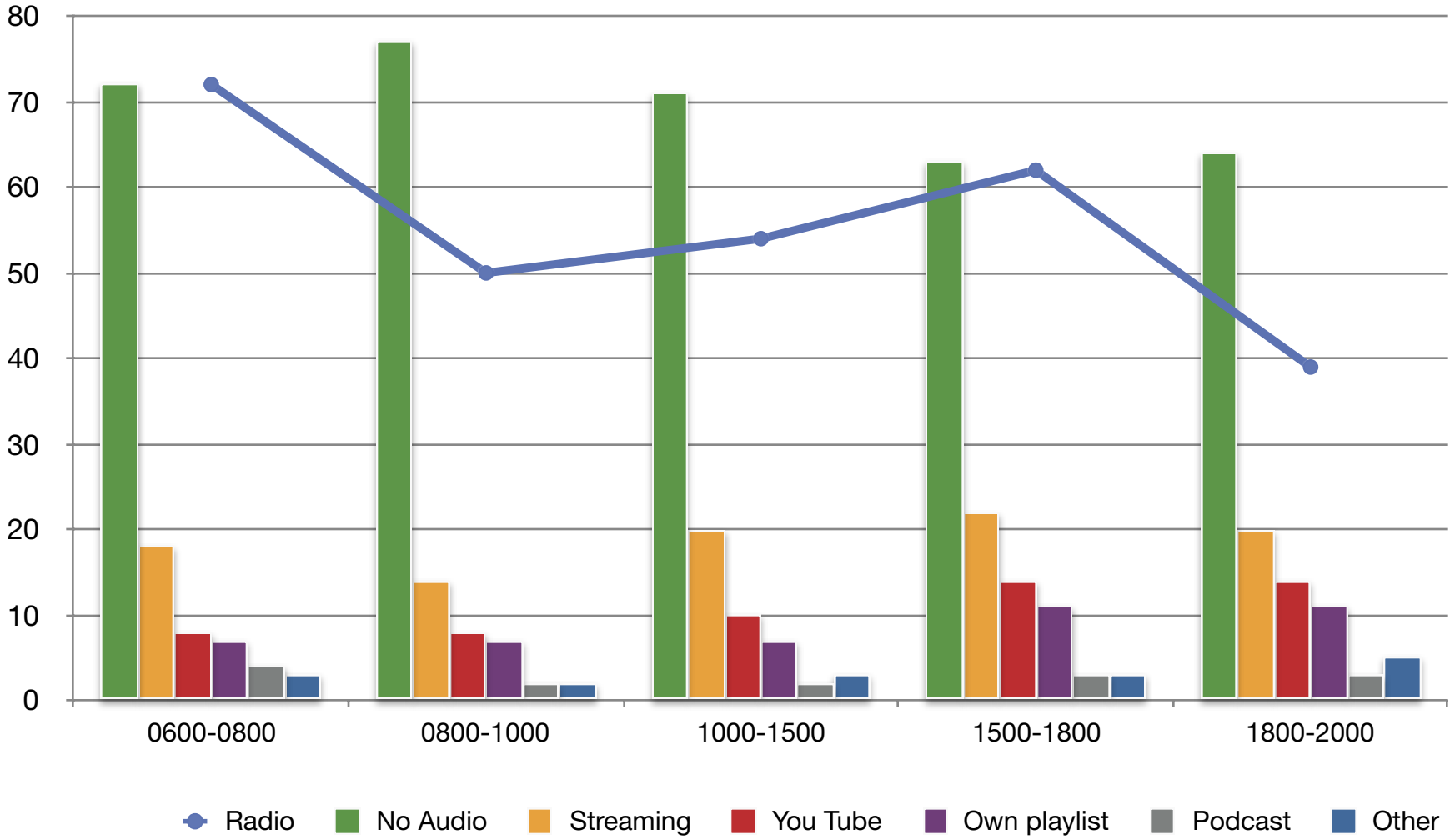
# Marktanteil/Share: age groups



(February 2020)



## Radio & non-Radio listening: Feb 2020





# listening / not listening:

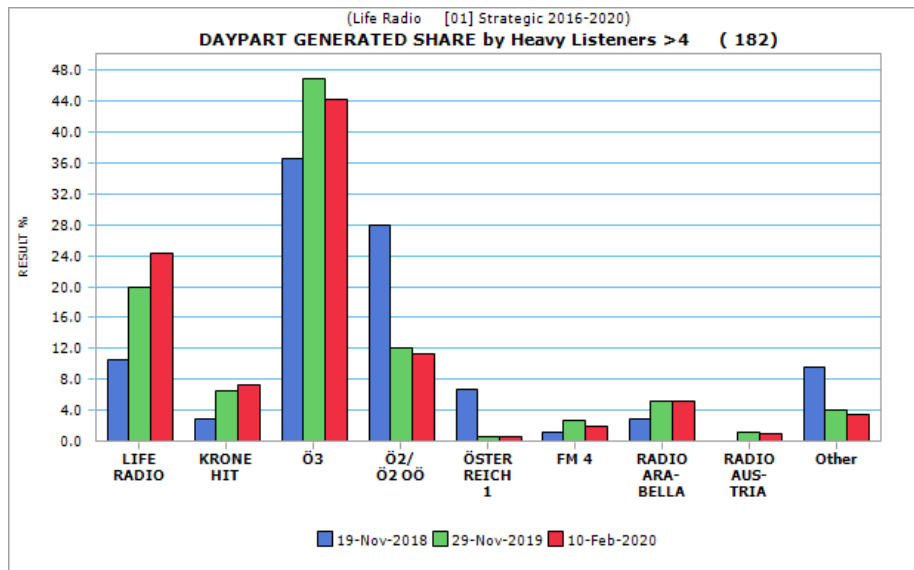
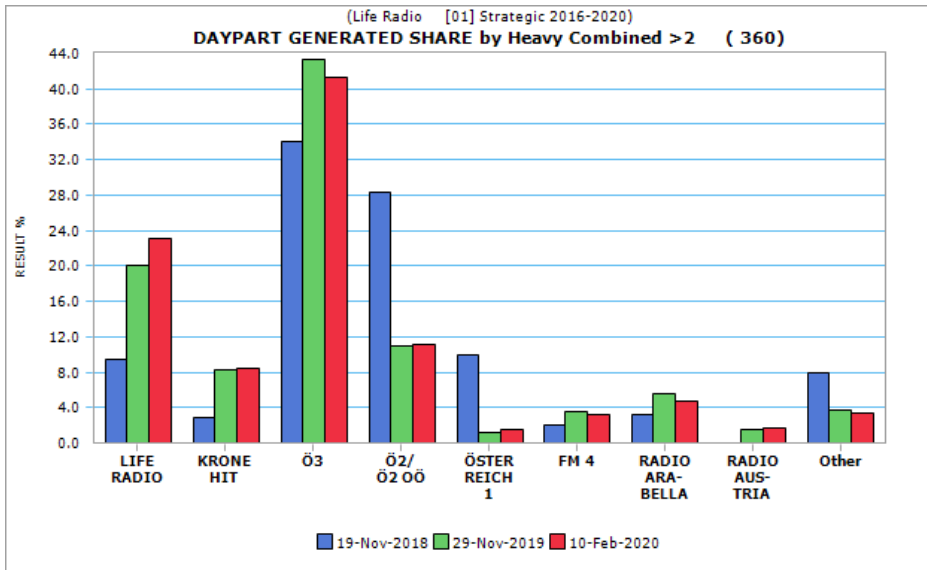
Listen by Daypart		Audio used	Listen by Daypart		Audio used	Listen by Daypart		Audio used
Listen: 06-08 72%	06-08: No Audio	72	Listen: 0800-1000 50%	08-10: No Audio	77	Listen: 1000-1500 54%	10-15: No Audio	71
	06-08: Streaming Service	18		08-10: Streaming Service	14		10-15: Streaming Service	20
	06-08: Music On Youtube	8		08-10: Music On Youtube	8		10-15: Music On Youtube	10
	06-08: Own Playlist/ Music	7		08-10: Own Playlist/ Music	7		10-15: Own Playlist/ Music	7
	06-08: Podcasts	4		08-10: Podcasts	2		10-15: Other	2
	06-08: Other	3		08-10: Other	2		10-15: Podcasts	3

# listening / not listening:

Listen by Daypart		Audio used
<b>Listen: 1500-1800 62%</b>	<b>15-18: No Audio</b>	63
	<b>15-18: Streaming Service</b>	22
	<b>15-18: Music On Youtube</b>	14
	<b>15-18: Own Playlist/ Music</b>	11
	<b>15-18: Podcasts</b>	3
	<b>15-18: Other</b>	3

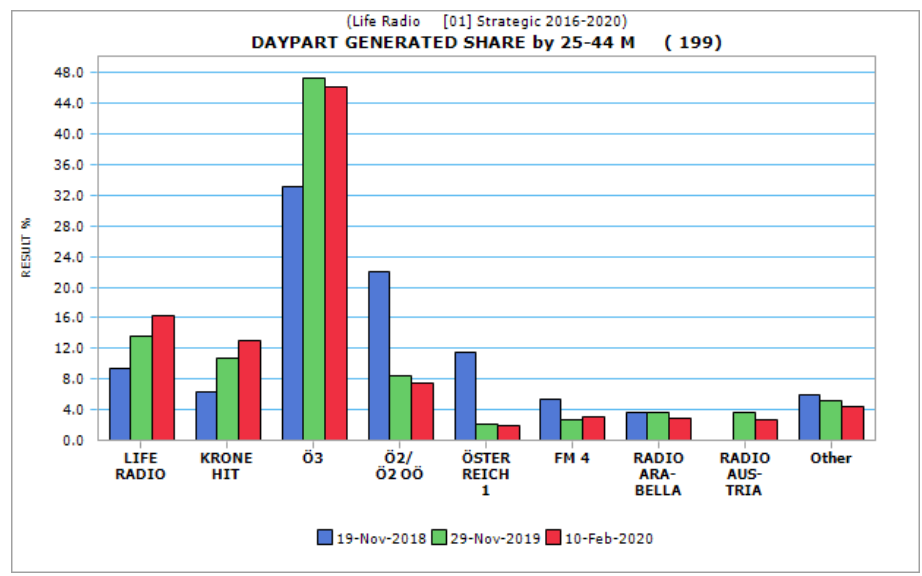
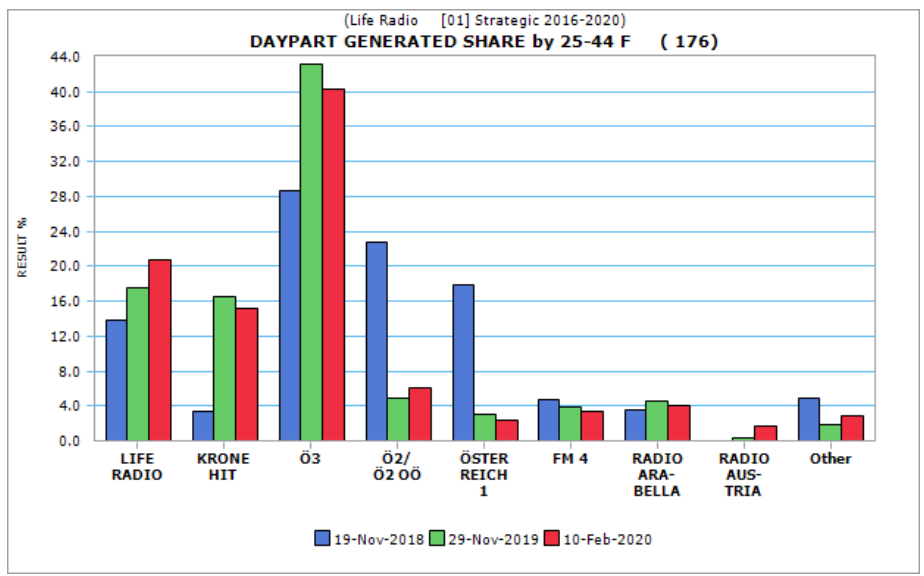
Listen by Daypart		Audio used
<b>Listen: 1800-2000 39%</b>	<b>18-20: No Audio</b>	64
	<b>18-20: Streaming Service</b>	20
	<b>18-20: Music On Youtube</b>	14
	<b>18-20: Own Playlist/ Music</b>	11
	<b>18-20: Other</b>	3
	<b>18-20: Podcasts</b>	5

.



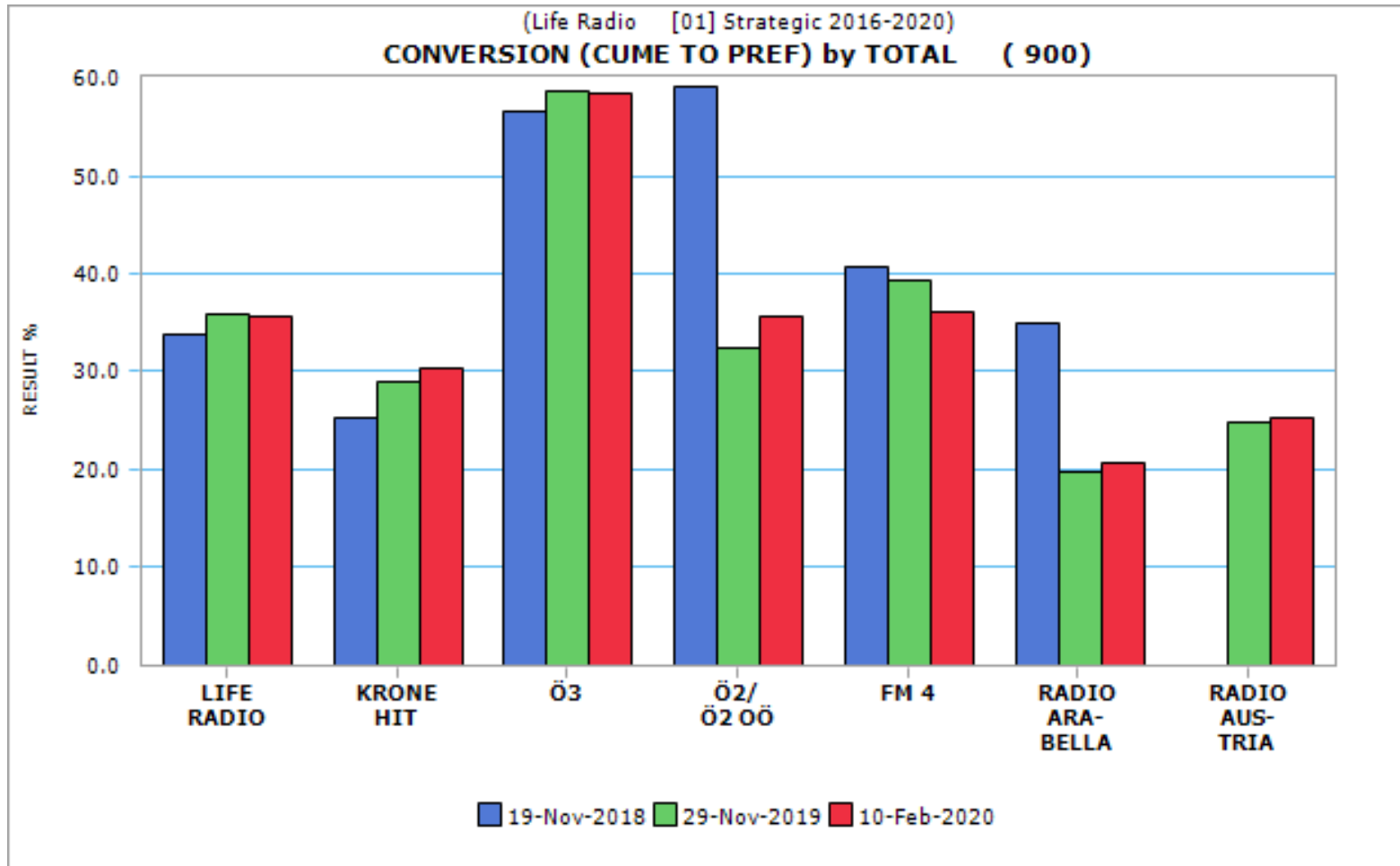
Better results among heavy listeners improves daytime share and ultimately better overall shares

# listening share: 25-44



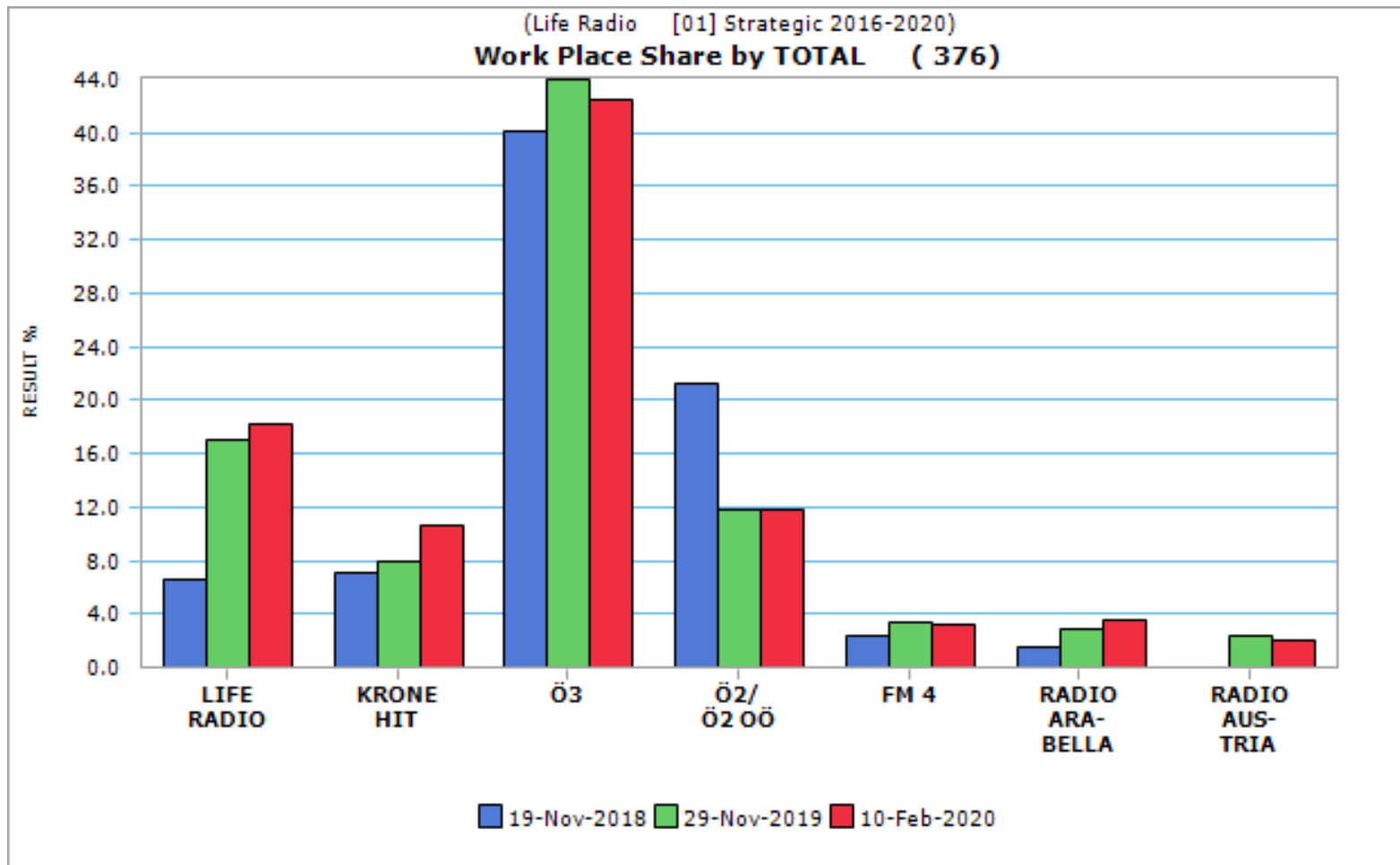
Ö3 shares were higher in the November sample - the latest results are back to the October levels

# CONVERSION: P1:P2 conversion



Conversion remains relatively low for Life Radio while improving for Krone Hit. This must remain a primary measure for share improvement.

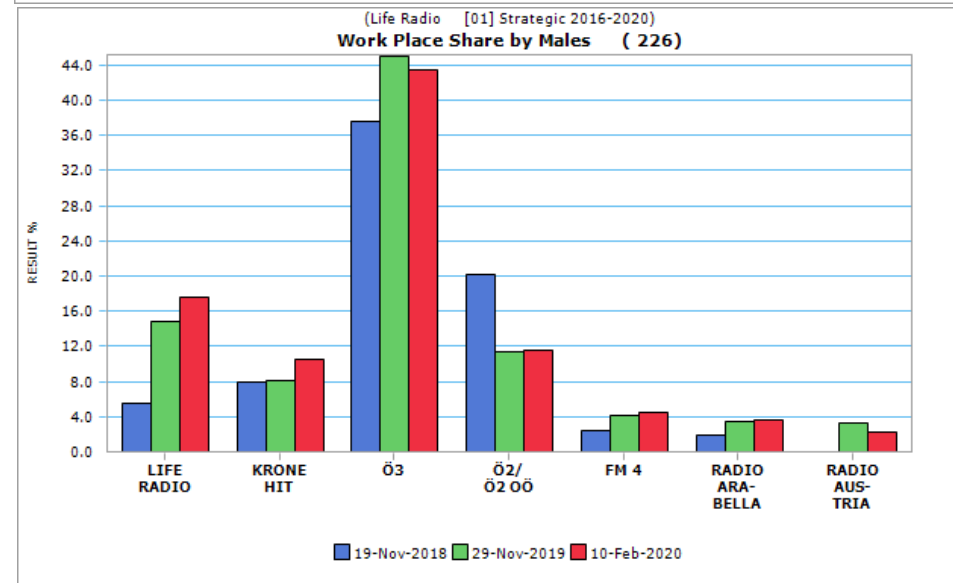
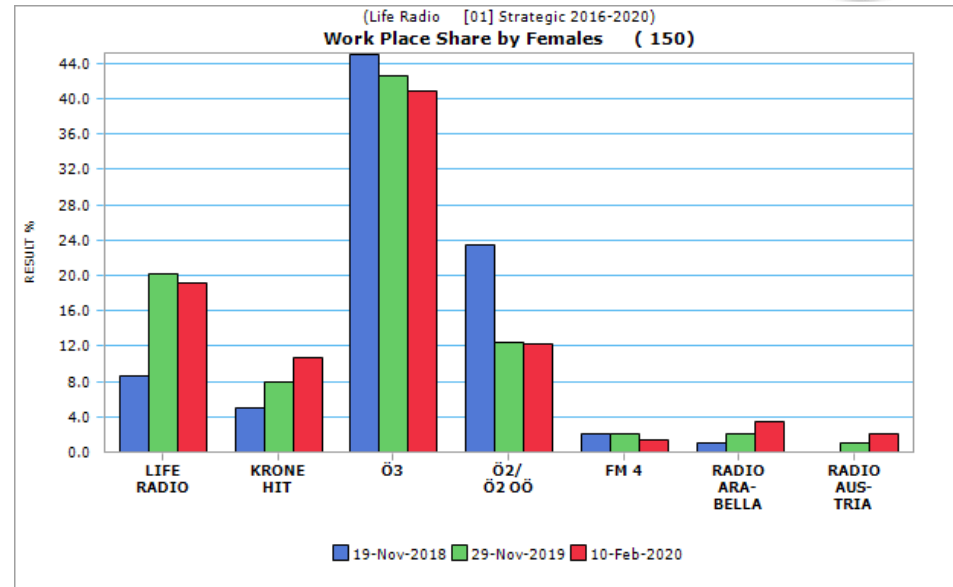
*Workday*



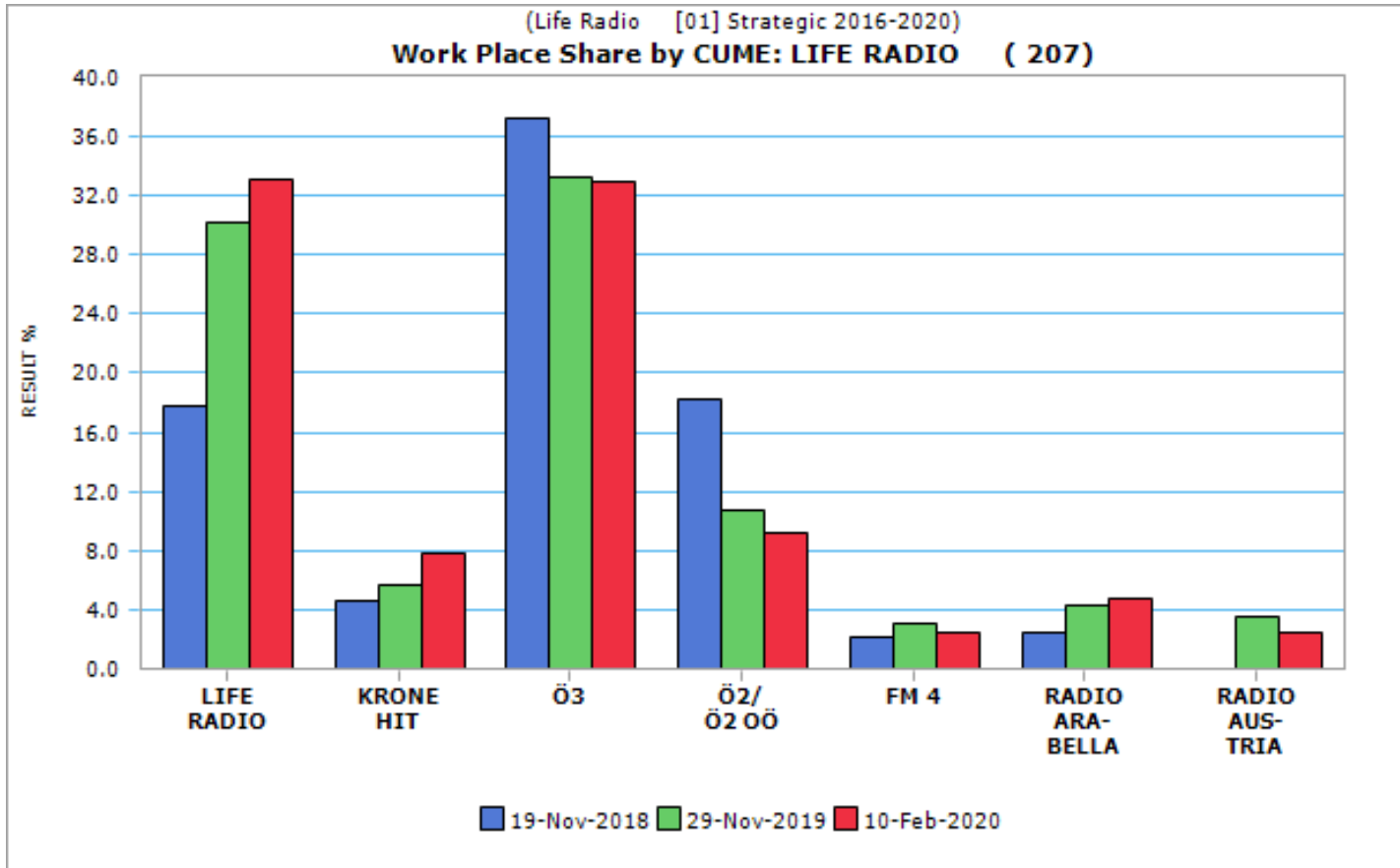
The historical results change, Life Radio improves but Krone and FM 4 are unchanged

Female share is unchanged since the last review

Male share improves - work day variety is an opportunity



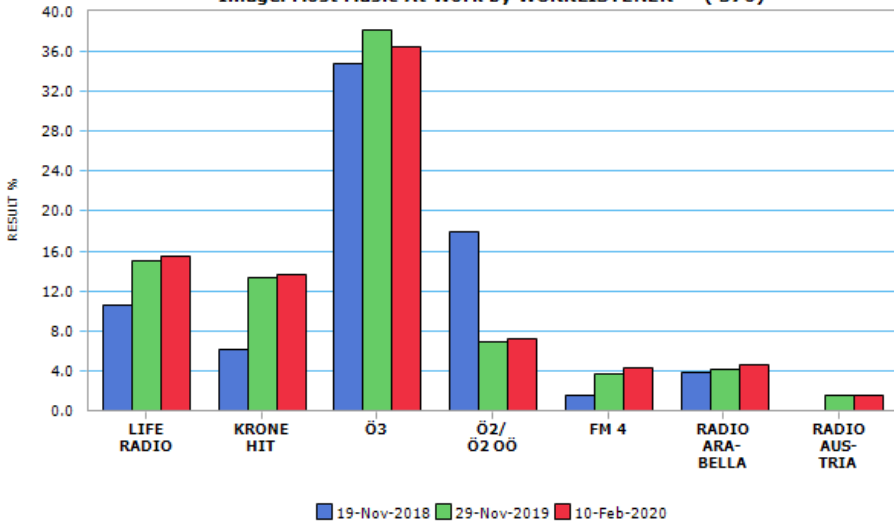




Retention of Life Radio listening continues to improve - now at the same level as Ö3, however the base is low

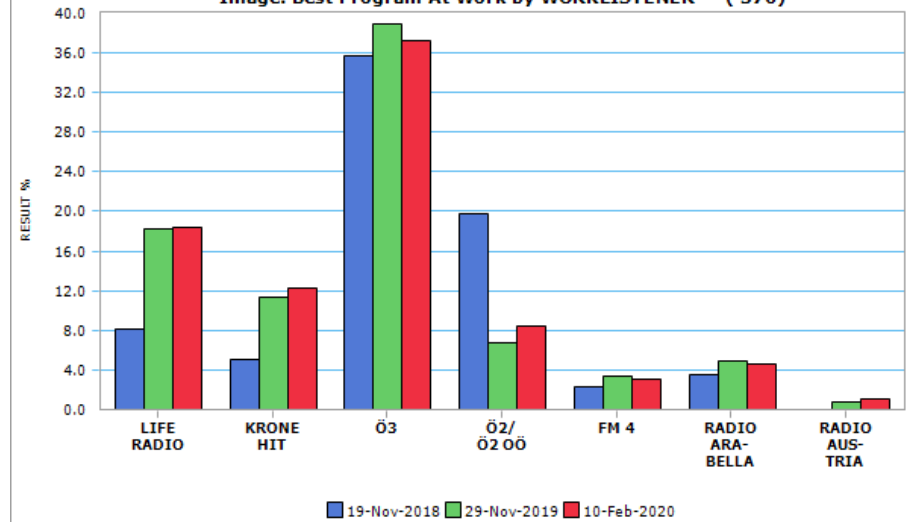
(Life Radio [01] Strategic 2016-2020)

**Image: Most Music At Work by WORKLISTENER ( 376 )**



(Life Radio [01] Strategic 2016-2020)

**Image: Best Program At Work by WORKLISTENER ( 376 )**



Ö3 still dominates daytime and workday listening

Notes from the November report are still relevant here:

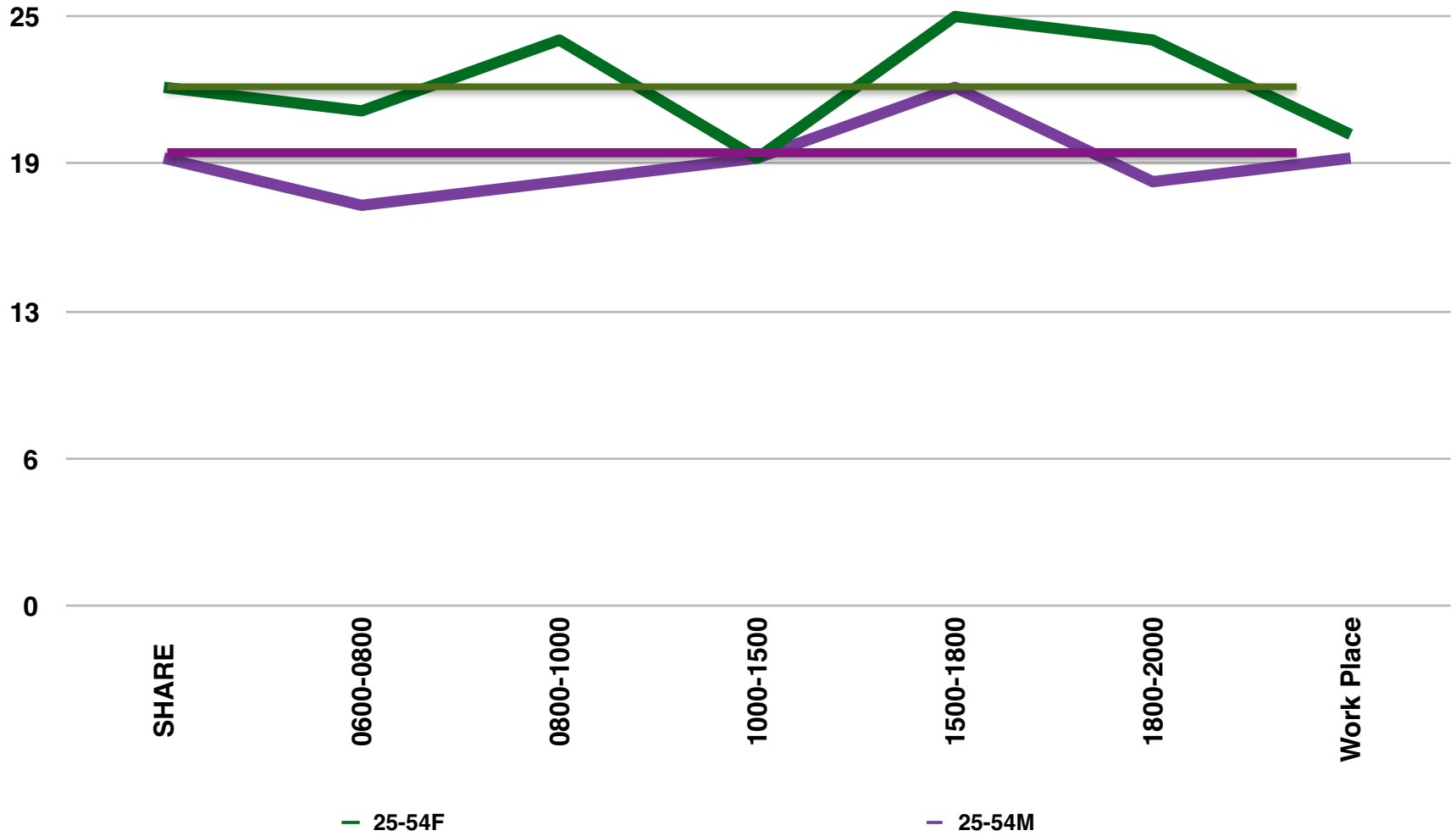
Daytimes and workday listening are an extremely important area for Life Radio to focus on, growth in heavy listening and workday share is a positive indicator here, however Ö3 dominates daytimes and workdays.

In part this will be a consequence of Morning Show inheritance listening - however there may be an opportunity to develop a more workplace specific focus that is consistent with the stations 'mix' message

Classic / older music features (this day in music)  
Music / song / mix contesting with daytime payoff.

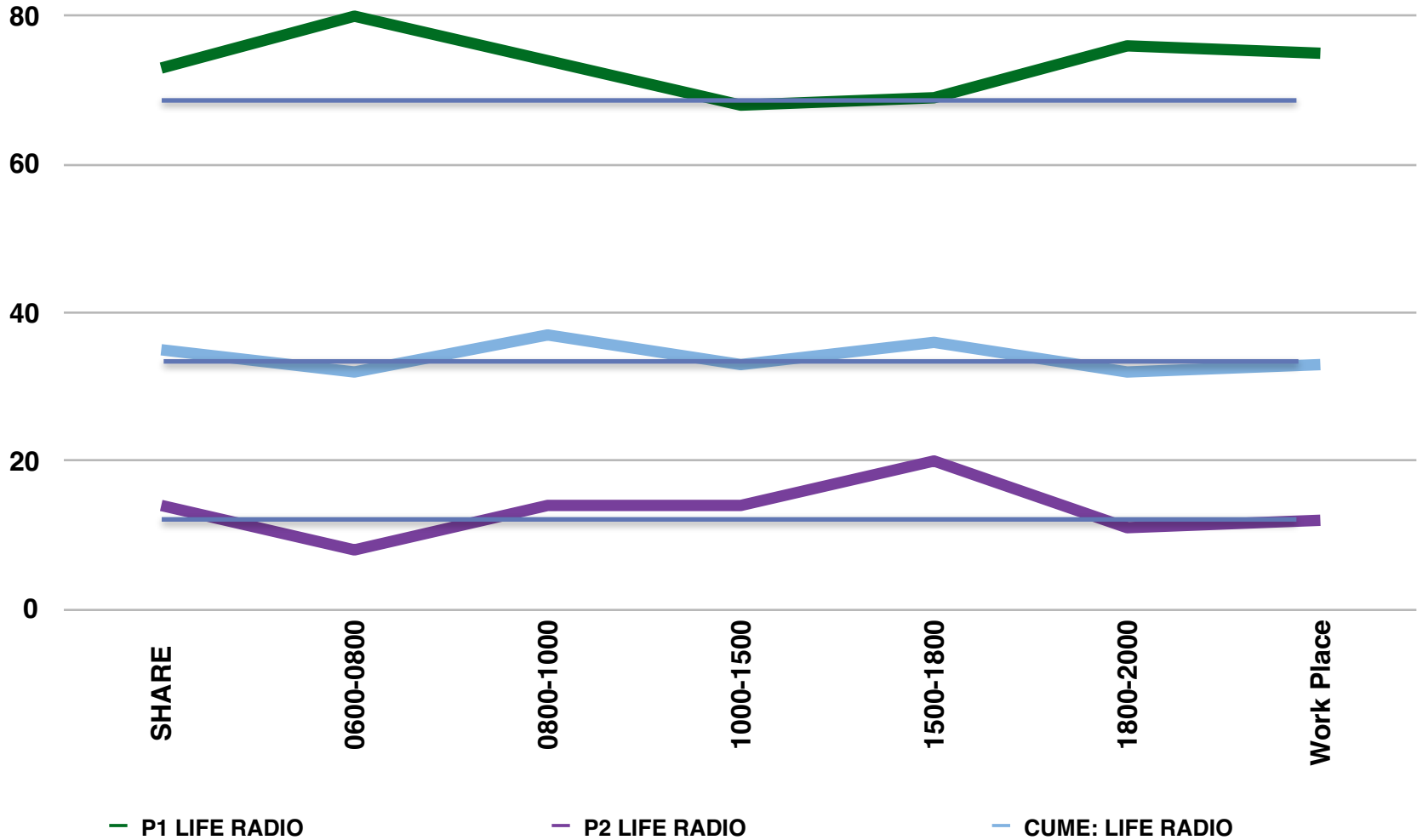
# *Key Indicators - Life Radio*

## 25-54 Listening retention - Life Radio



Share is the benchmark the opportunity for growth is among females during the day

Life Radio: P1 & P2 listening shares



This highlights the differences between these groups, P1 listening is positive in the morning show and evening. P2 listening share is lower than average in the morning and higher in the afternoon drive period.



# Key Indicators - Life Radio: Core listeners

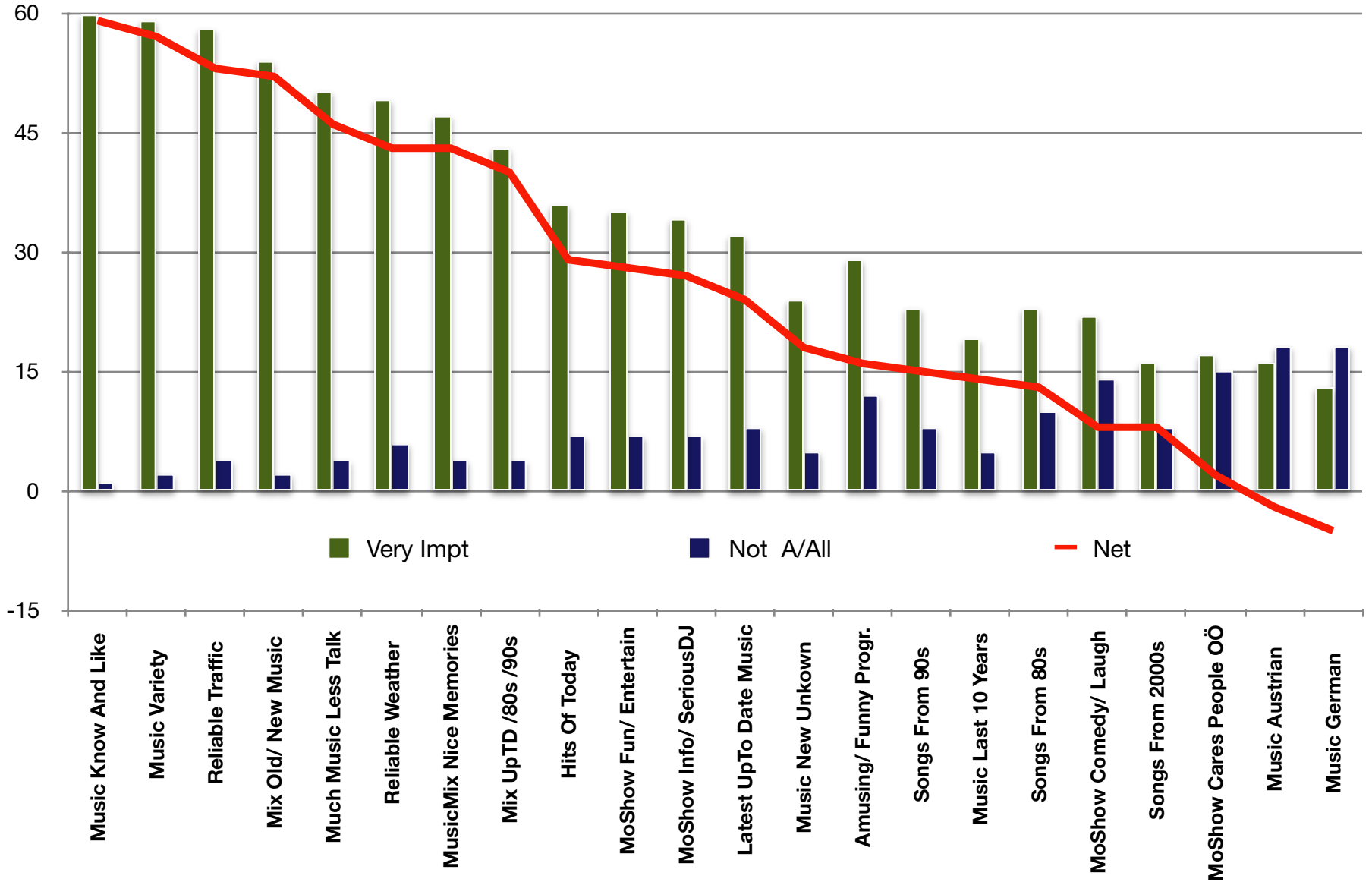


LIFE RADIO: February 2020		
	P1 LIFE RADIO	P2 LIFE RADIO
<b>DAYPART GENERATED SHARE</b>	<b>73</b>	<b>14</b>
Best Music	69	10
Music Know And Like	62	10
Hits Of Today	33	5
Latest/ UpToDate Music	35	5
Mix Old/ New Music	63	21
Mix UpTD /80s /90s	54	22
Songs From 2000s	41	15
Lot Songs From 90s	44	21
Best Songs From 80s	38	23
Most Music	42	11
Most Variety MusicMix	56	13
Plays songs sound same	9	6

# *Music Importance-Images*



### Combined Important: Total



### **Tier One**

- A Mix of old and new Music
- Music Variety
- Traffic
- Music I know & like

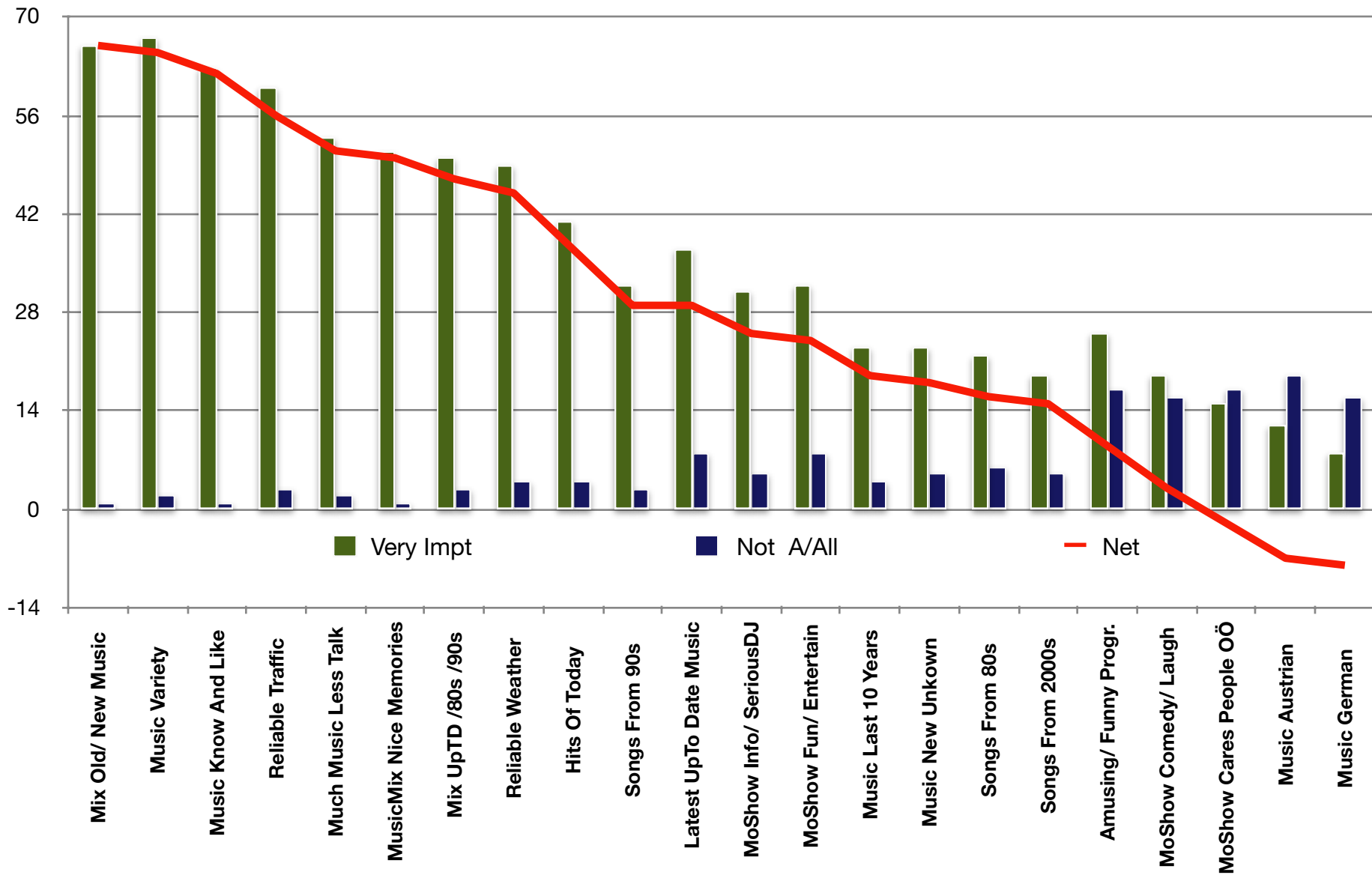
### **Tier two**

- Musicmix - nice memories
- More music - little talk
- Weather
- New music & 80s/90s

### **Worst case**

- Austrian Music
- German Music

Total Important: 25-44F



### **Tier One**

- A Mix of old and new Music
- Music Variety
- Music I know & like
- Traffic

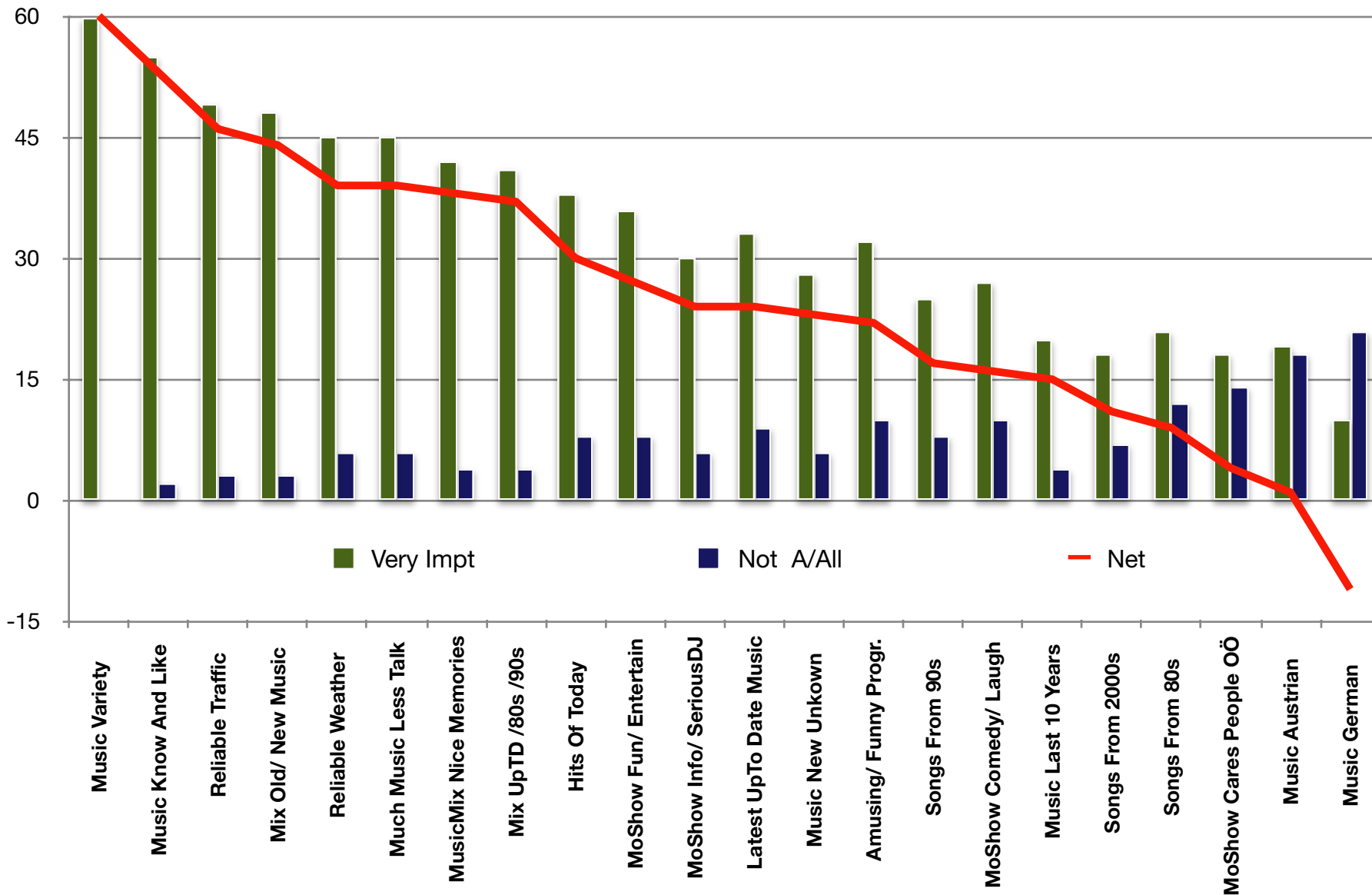
### **Tier two**

- Musicmix - nice memories
- New music & 80s/90s
- More music - little talk
- Weather

### **Worst case**

- Austrian Music
- German Music

Total Important: 25-44M



## **Tier One**

- Music Variety
- Music I know & like
- A Mix of old and new Music
- Traffic

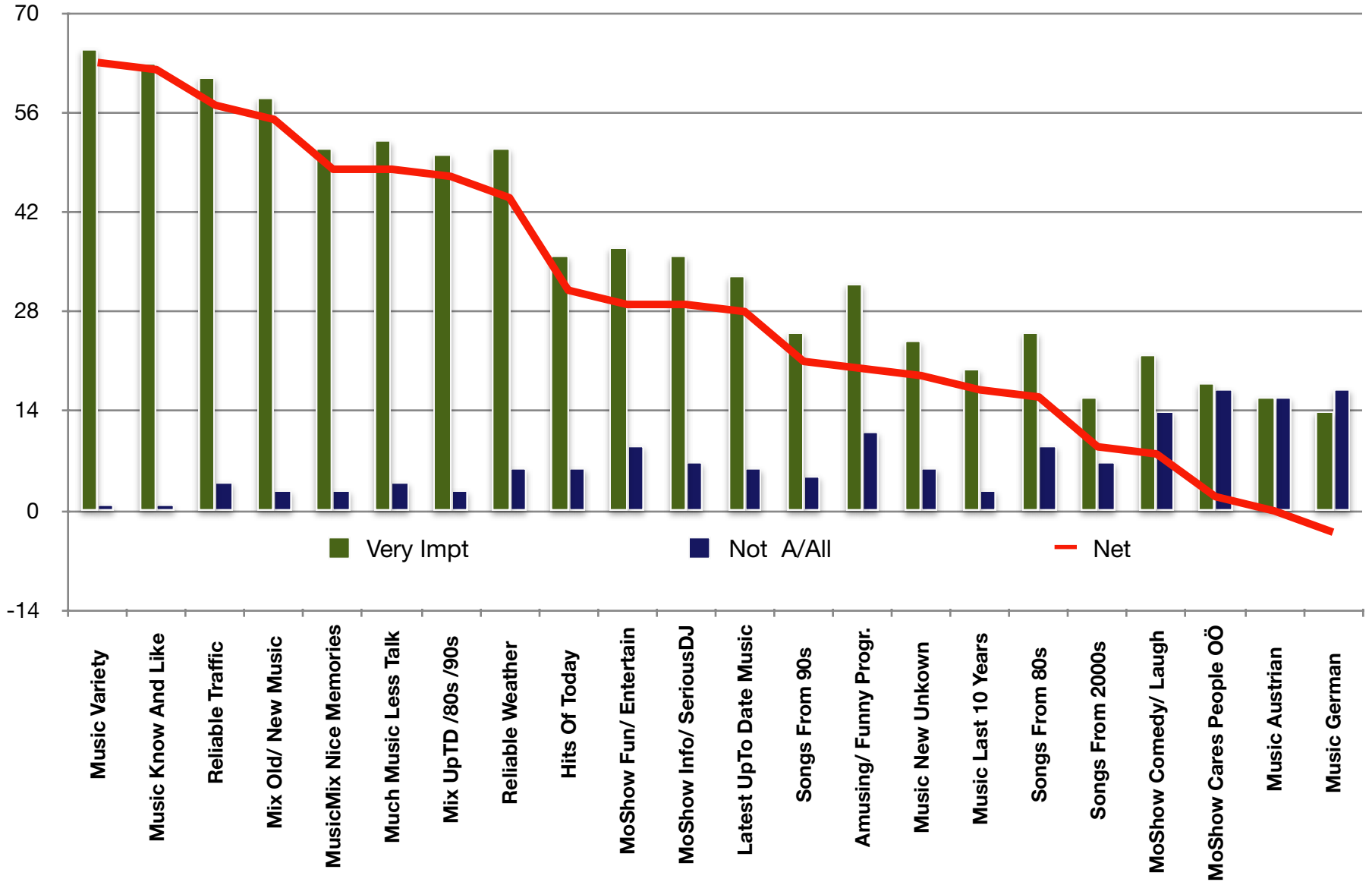
## **Tier two**

- Weather
- Musicmix - nice memories
- New music & 80s/90s
- More music - little talk

## **Worst case**

- Austrian Music
- German Music

### Total Important: WHK Life Radio





# Importance: changes

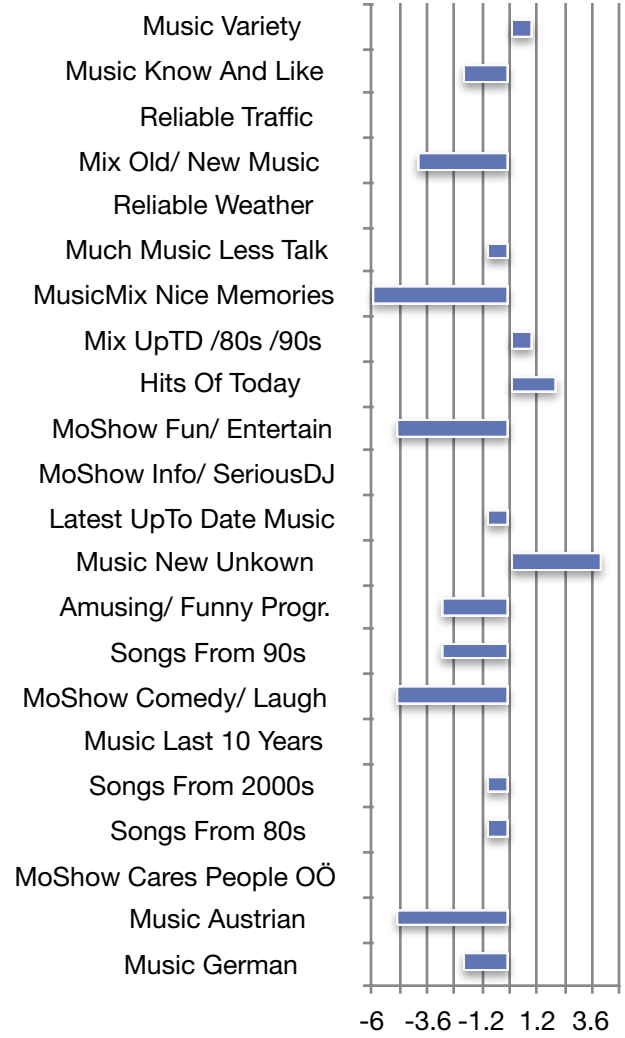
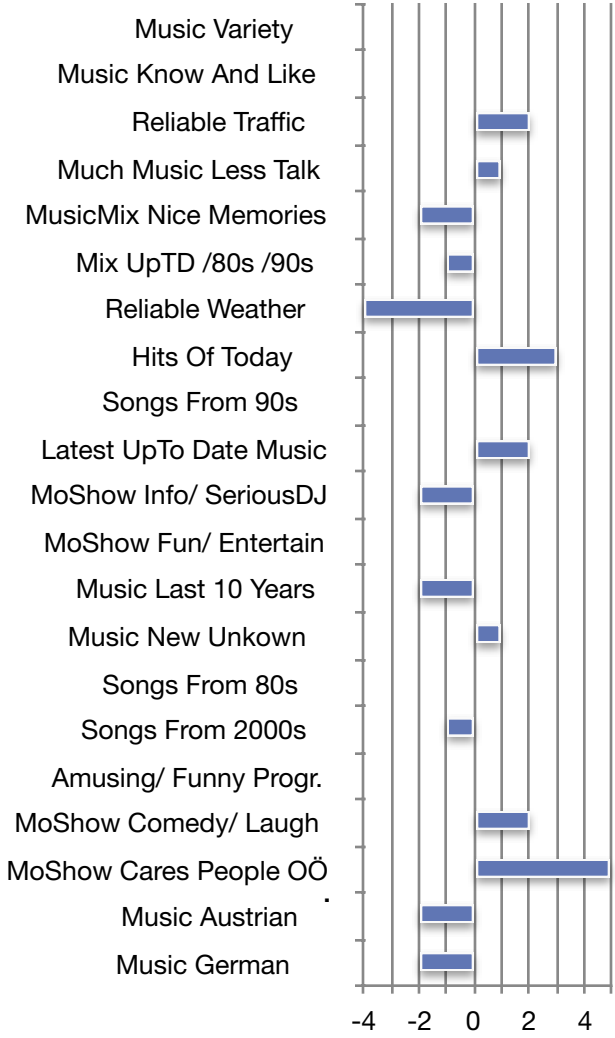
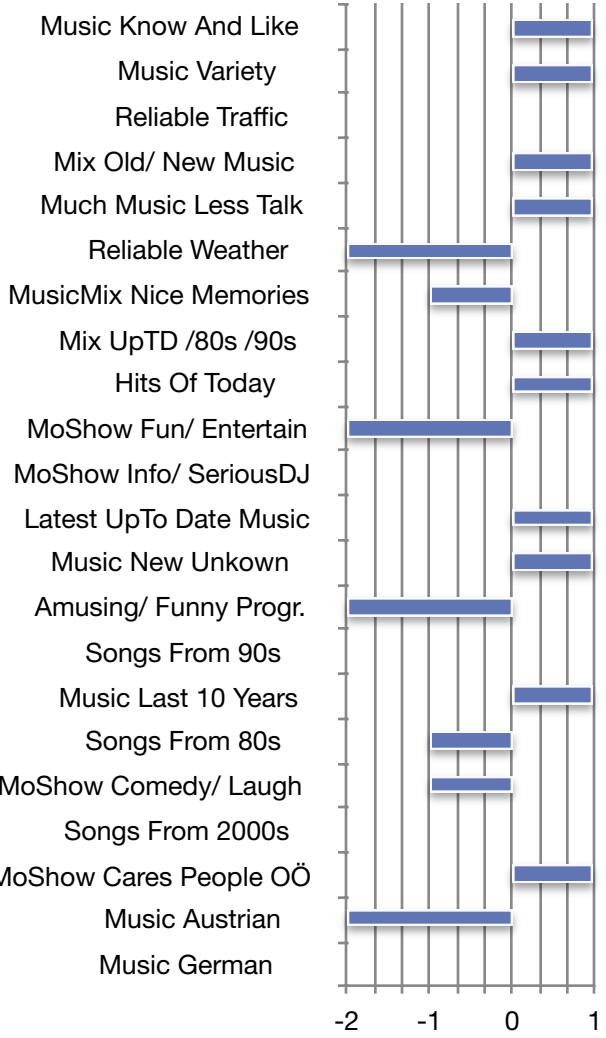
February 2020



### Total

### 25-44F

### 25-44M

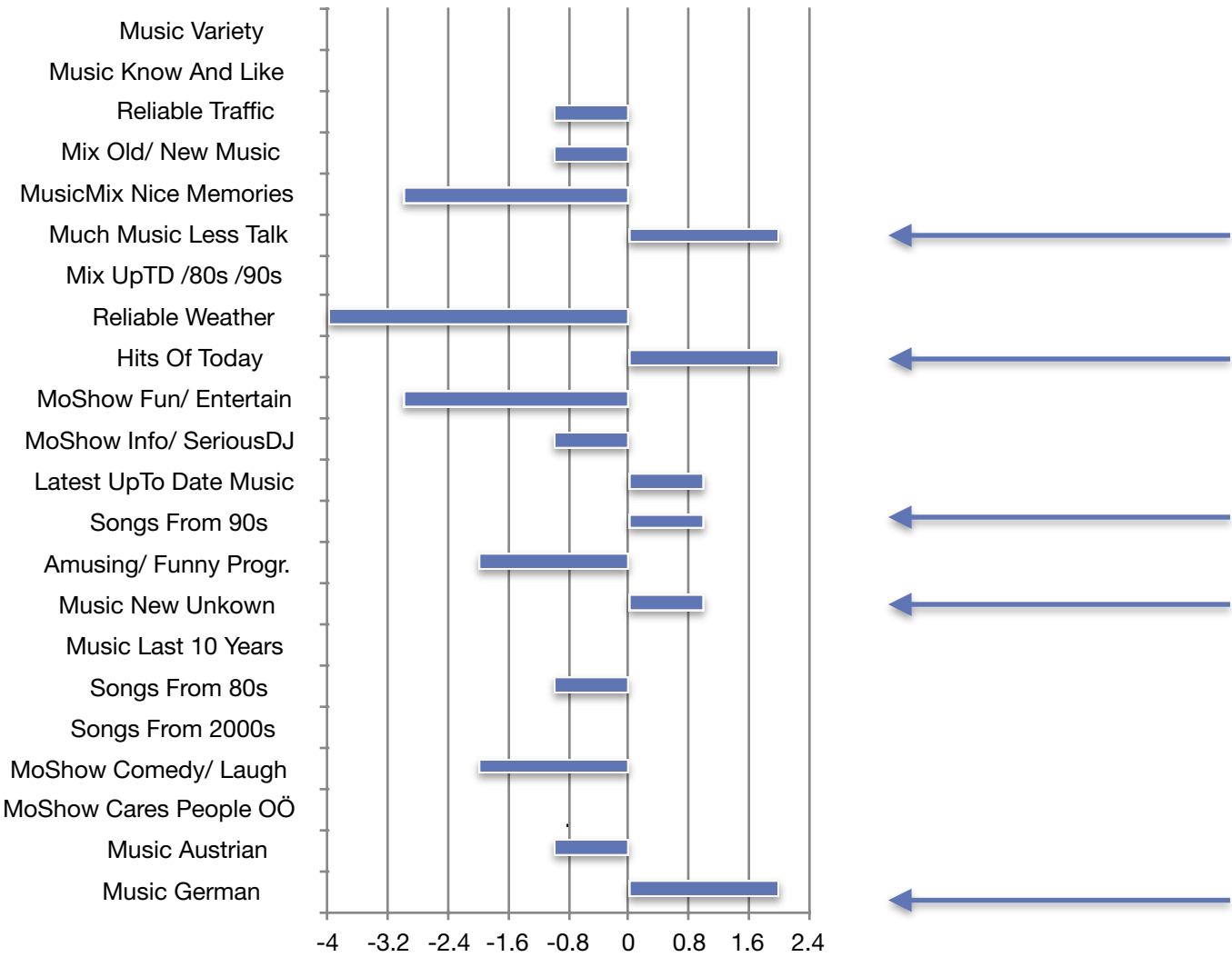




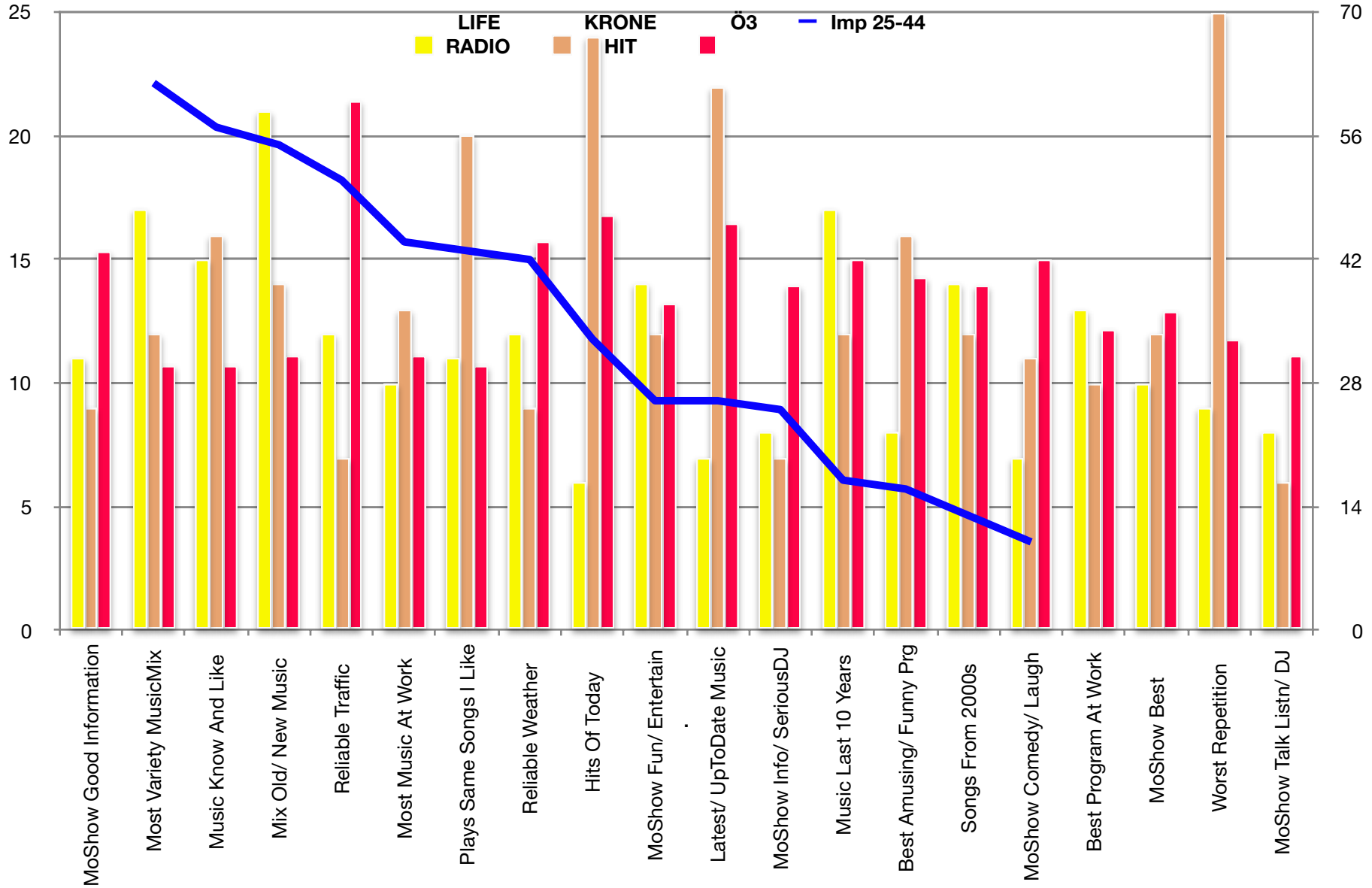
# Importance: changes

February 2020

## WHK Life Radio

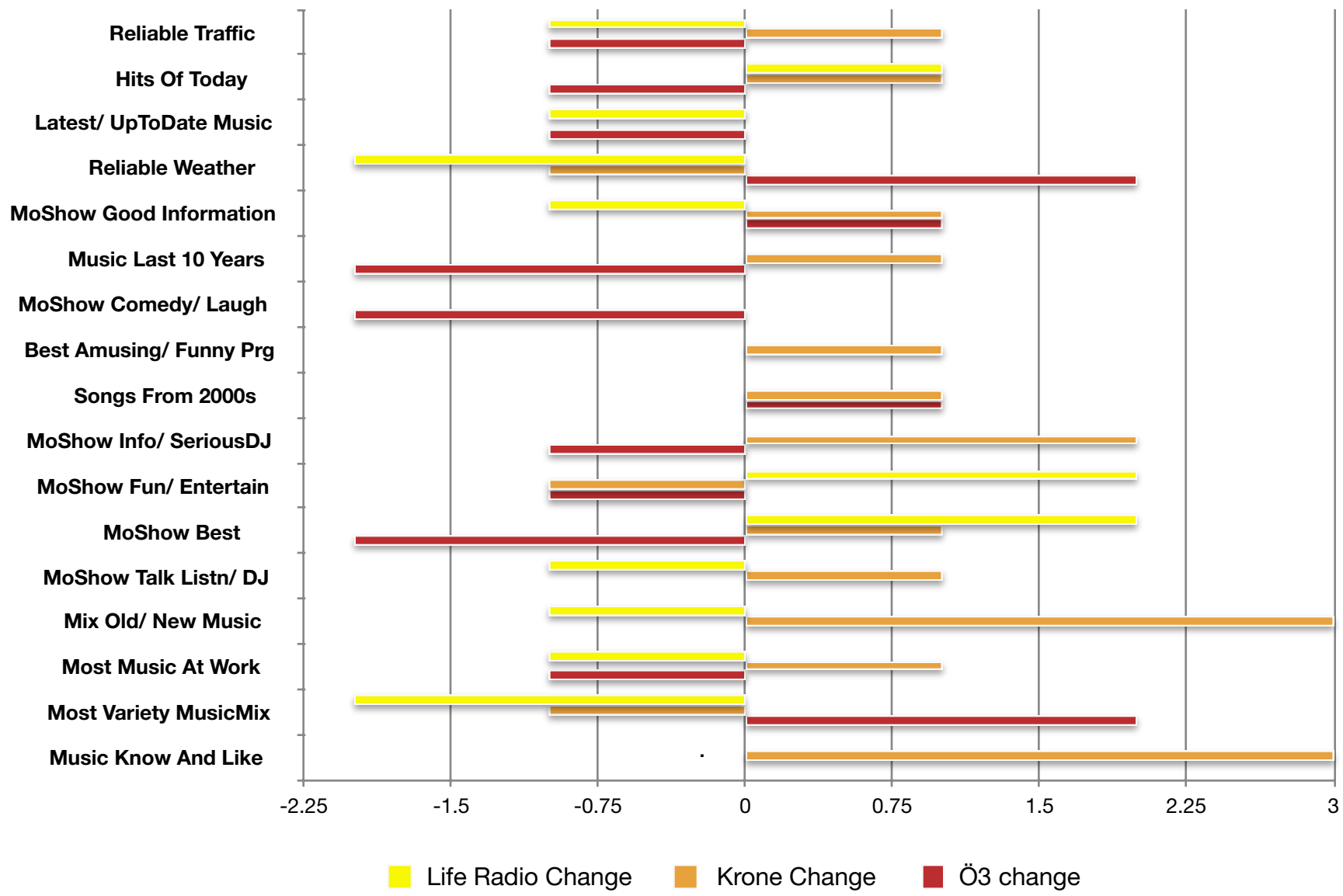


## 25-44 Images (importance)



# Images: changes

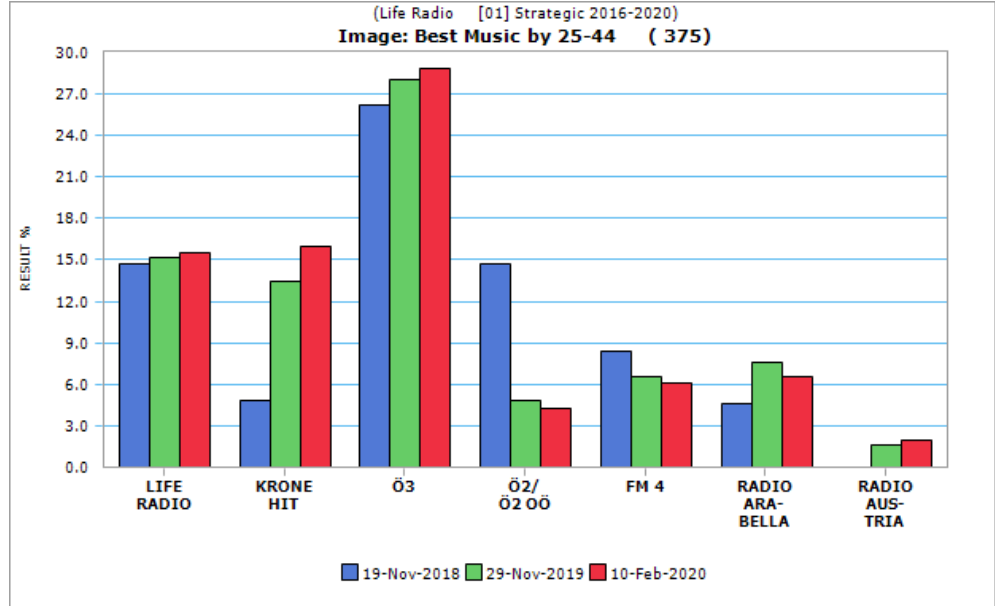
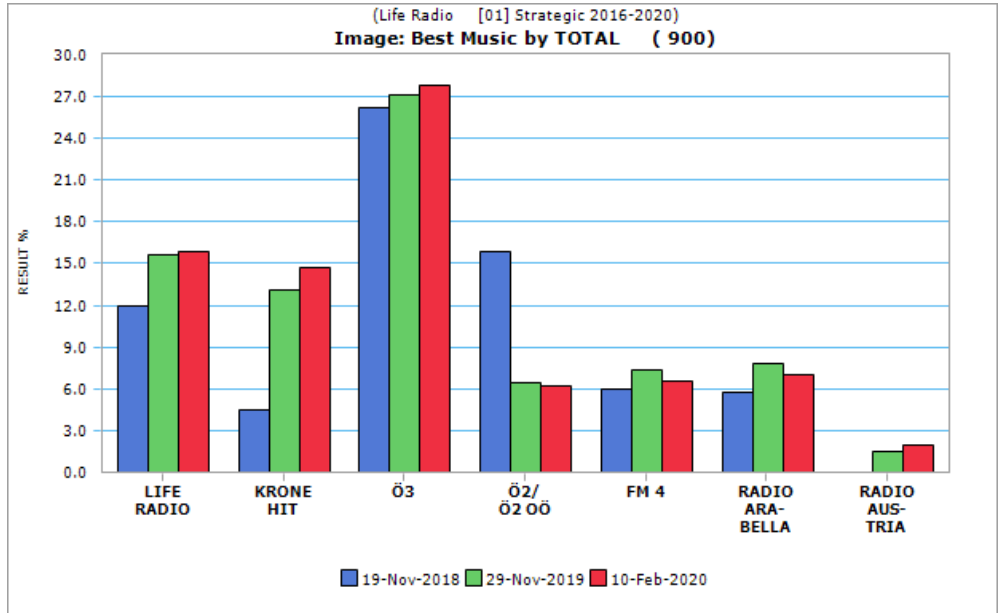
25-44



# *Music Montages*

Total Best Music improves for Ö3, Krone and Life Radio since 2018, there are small but positive trends for all three stations.

In this age group, Ö3 remains dominant, Krone is also improving - Life Radio has an older age group appeal - which shows positive results for the 25-54 age group.



# Montages

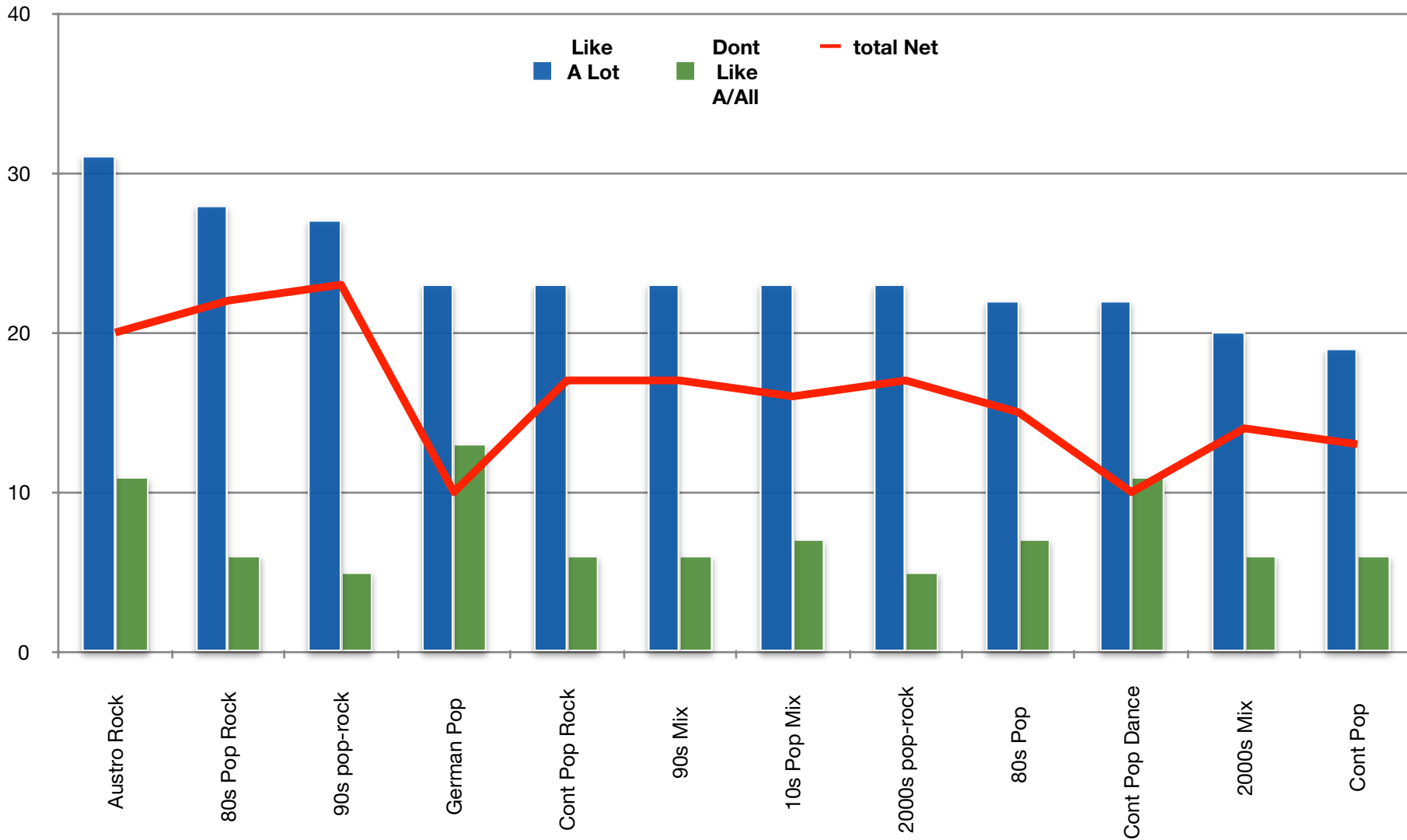
<b>Contemporary Pop (18%)</b>		<b>Contemporary Pop-Dance (20%)</b>	
<b>Contemporary Pop-Rock (23%)</b>		<b>2010s mix (22%)</b>	
<b>2000s Mix (20%)</b>		<b>2000s Pop-Rock (23%)</b>	
<b>90s Mix (23%)</b>		<b>90s Pop-Rock (27%)</b>	
<b>80s Pop (23%)</b>		<b>80s Pop-Rock (27%)</b>	
<b>German Pop (22%)</b>		<b>Austro Rock (31%)</b>	

- The broader age groups show some interesting music coalitions - and there appears to be little to differentiate them - however the age splits on the following page show the impact of the 14-19 age group on a number of these .

	TOTAL	14-19	20-29	25-34	35-44	45-54
Austro Rock	31	29	31	35	27	33
80s Pop Rock	28	21	26	27	29	34
90s pop-rock	27	24	30	31	31	25
German Pop	23	18	18	15	22	33
Cont Pop Rock	23	32	24	20	18	26
90s Mix	23	22	26	22	19	23
10s Pop Mix	23	35	29	19	17	22
2000s pop-rock	23	24	25	25	27	18
80s Pop	22	9	19	18	30	26
Cont Pop Dance	22	37	25	21	20	19
2000s Mix	20	26	21	20	20	21
Cont Pop	19	26	21	14	17	22

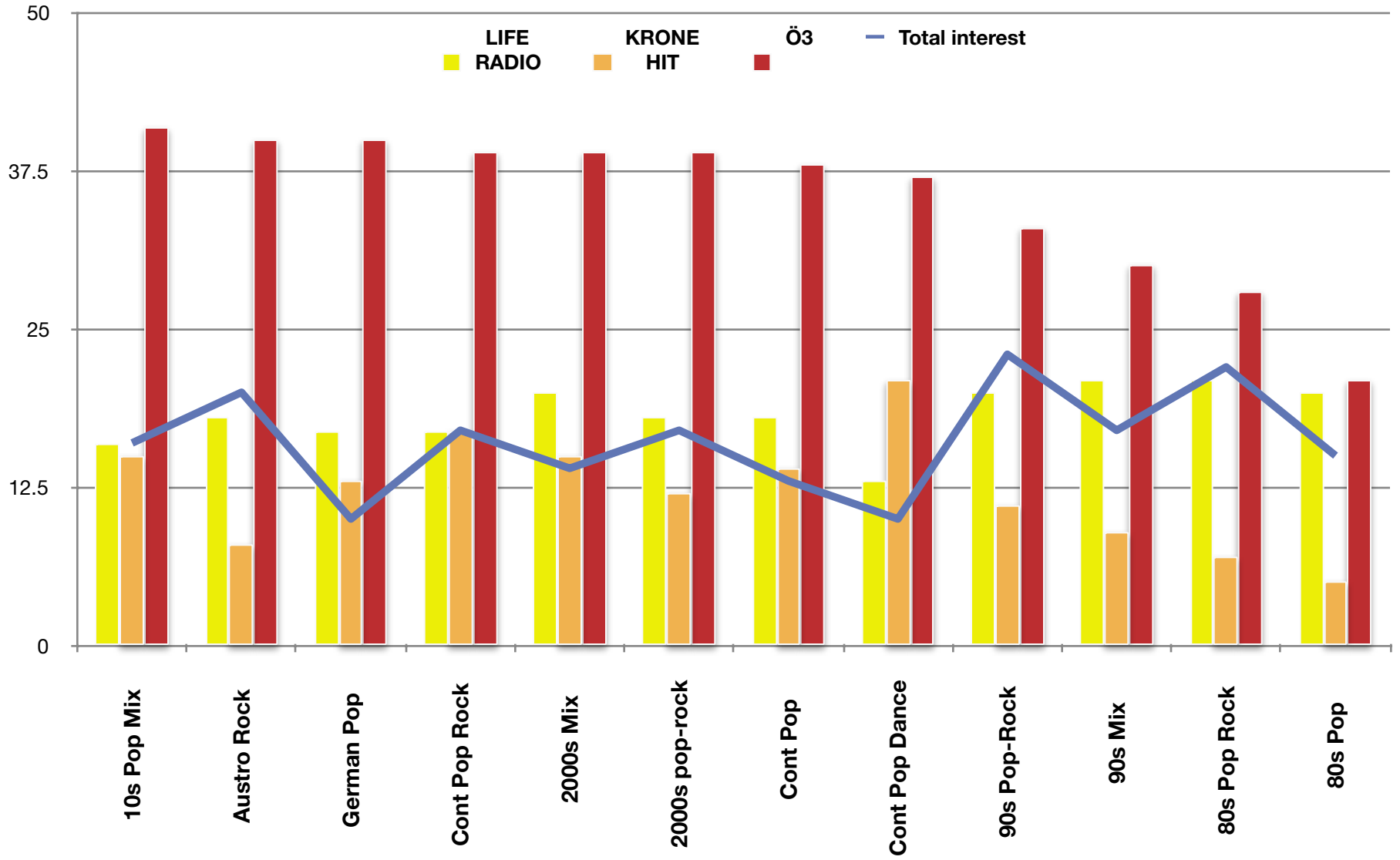
- The highlights show the ‘centre of passion for each music style with most contemporary music attracting the highest response from under 30 age groups, while older 25+ groups show higher interest in 2000s 90s & 80s. Austro Rock has strong appeal, but is higher in 25+ age groups.

## Montages: total





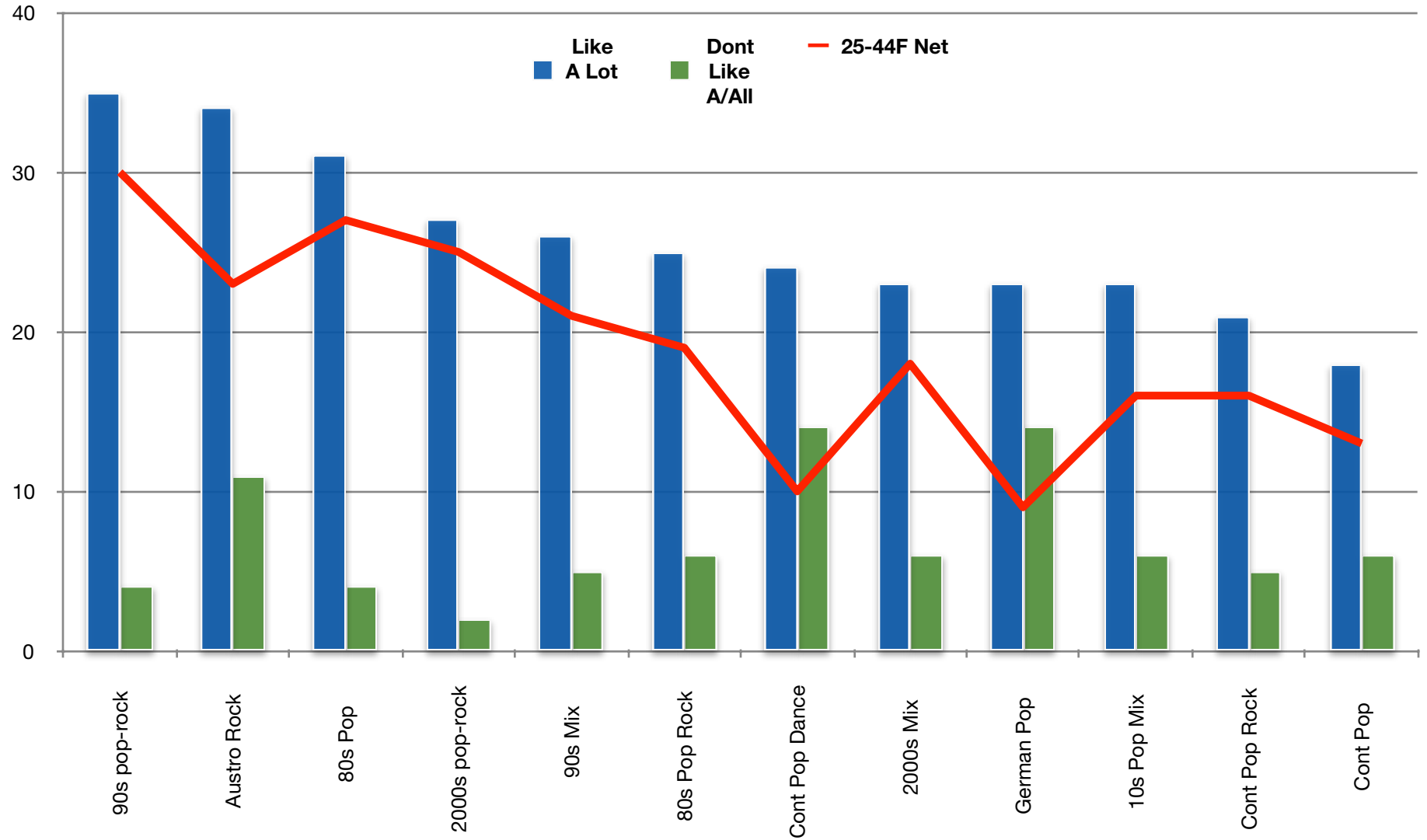
## Montages - Association: total



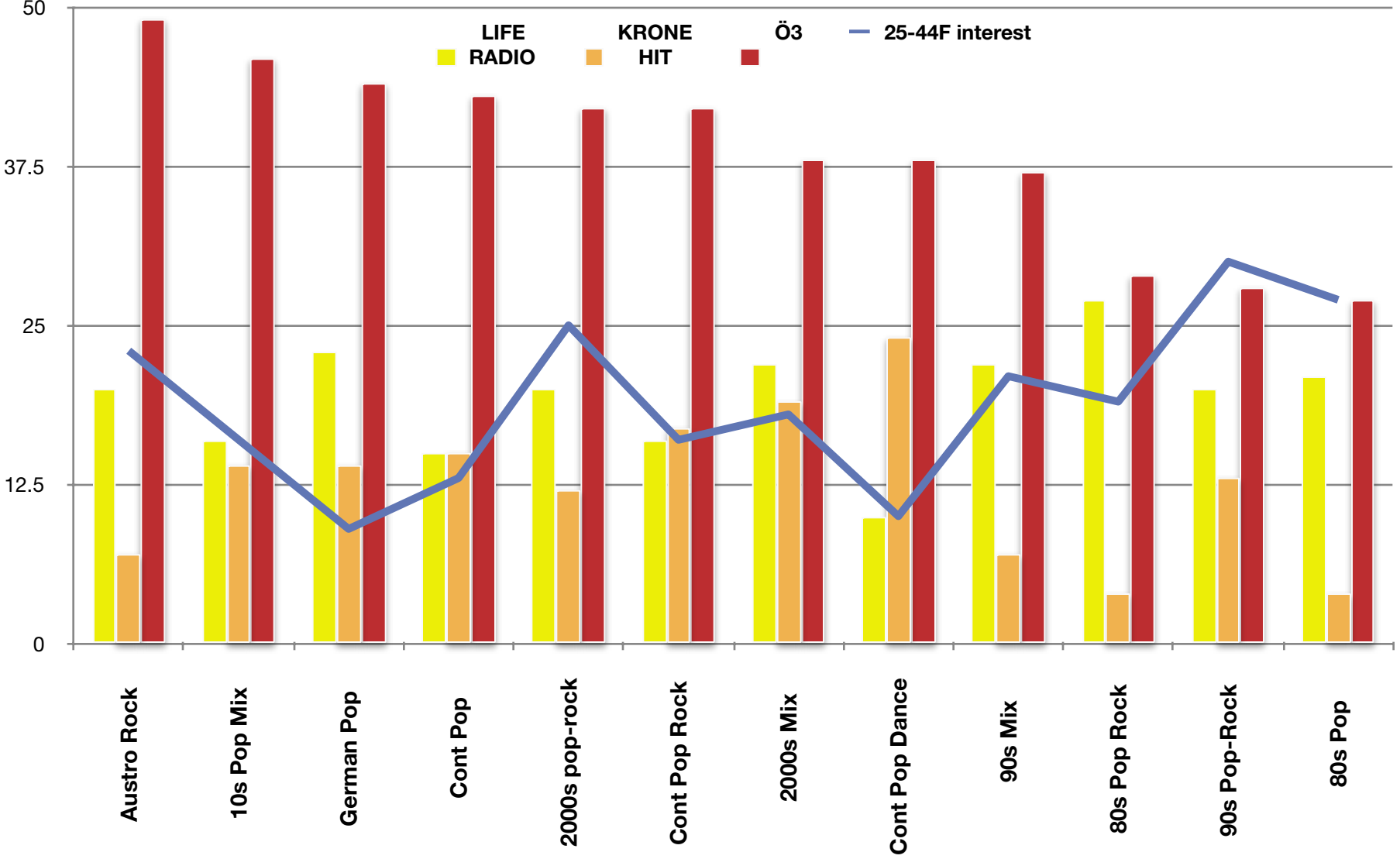


**25-44 Females**

## Montages: 25-44 Females



## Montages - Association: 25-44F

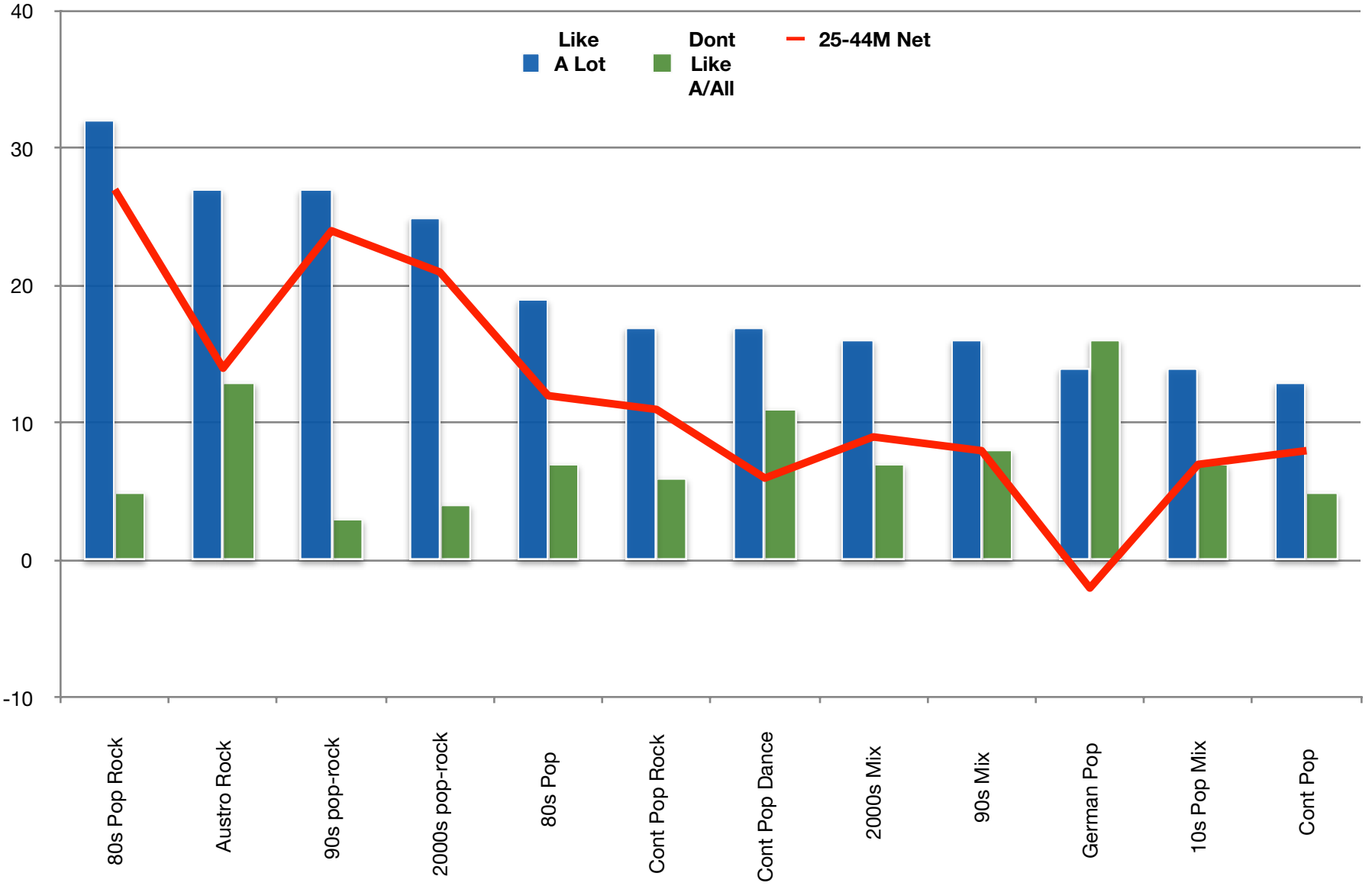




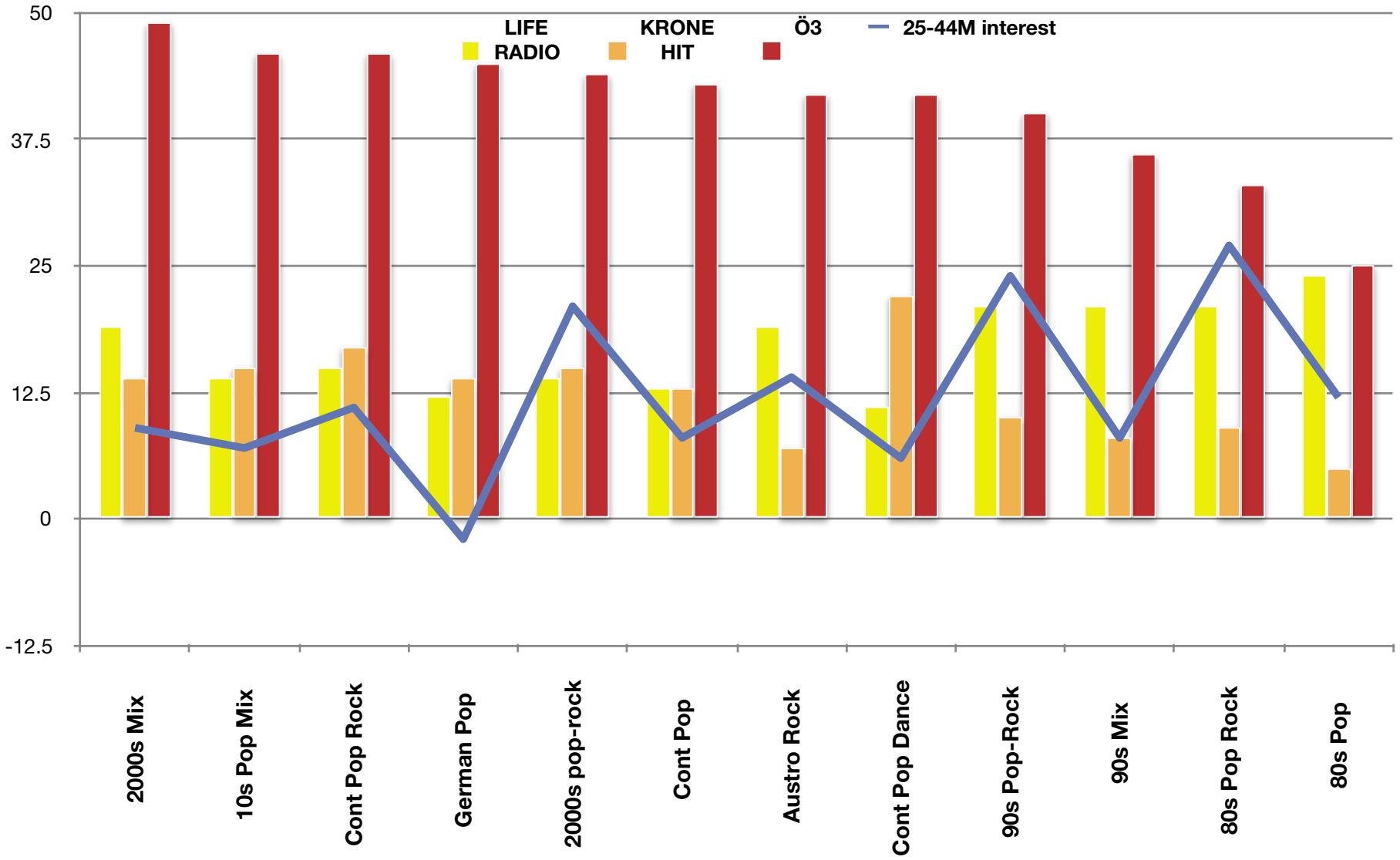
**25-44 Males**

# Montages

## Montages: 25-44 males



## Montages - Association: 25-44M



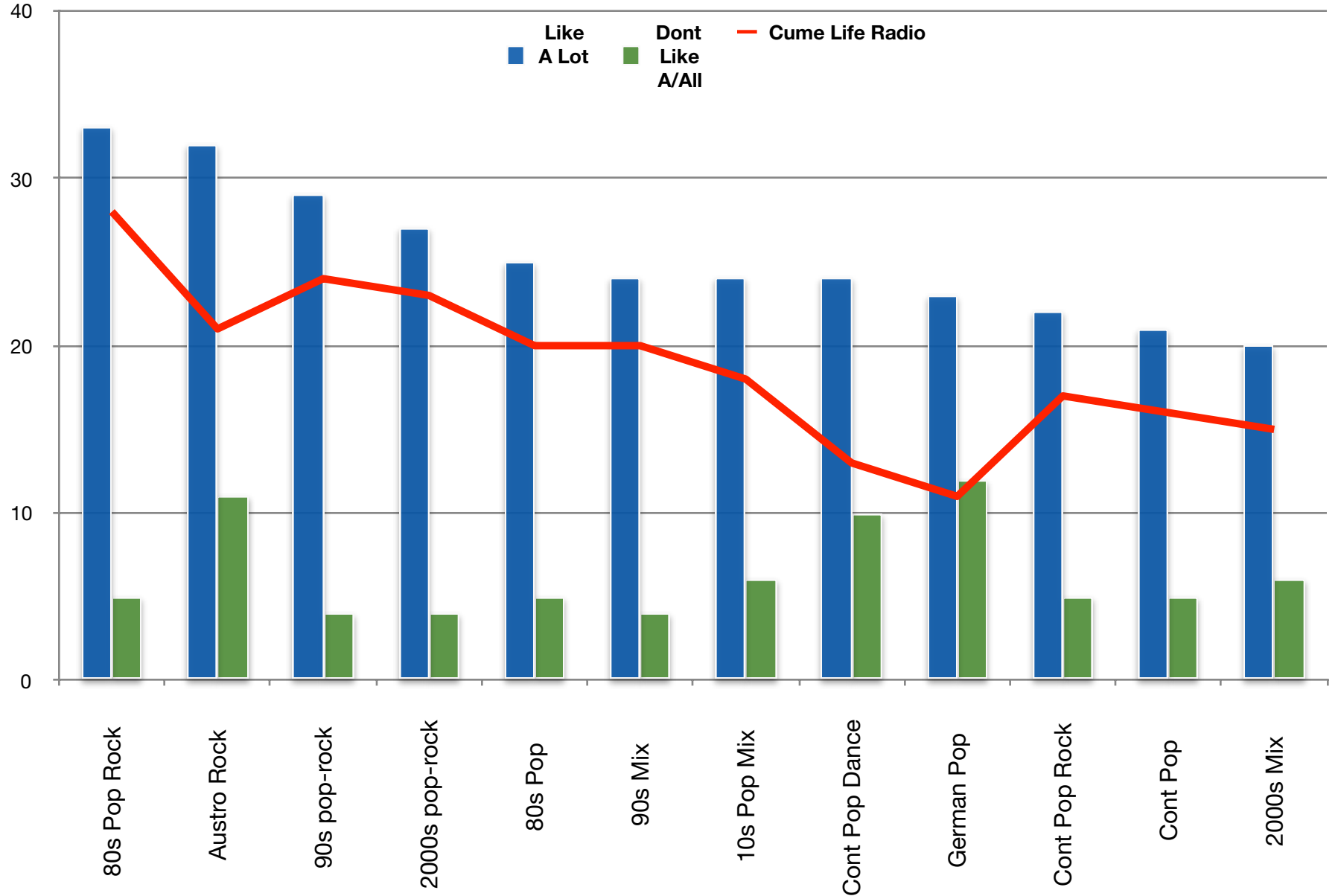


**Cume: Life Radio**

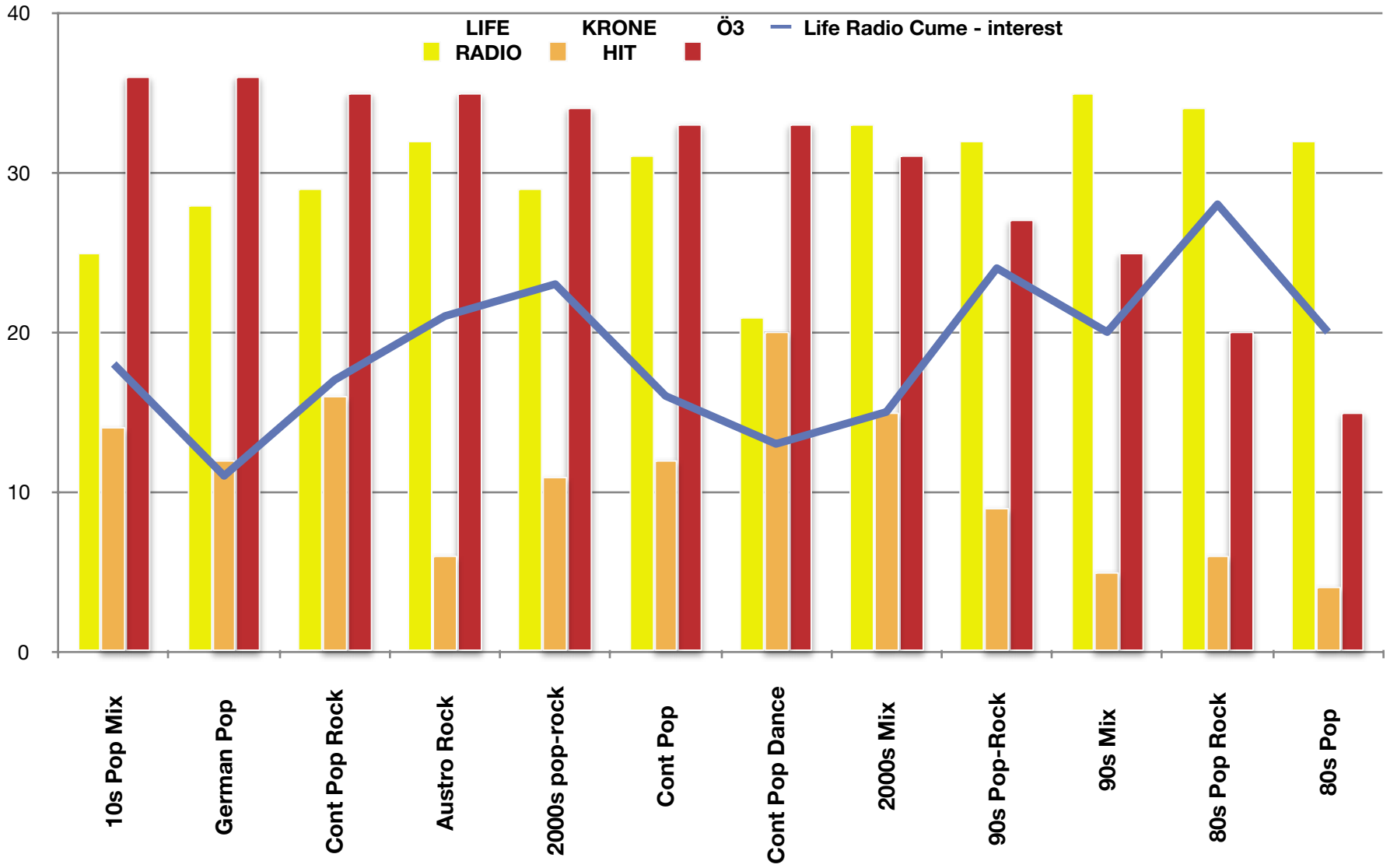


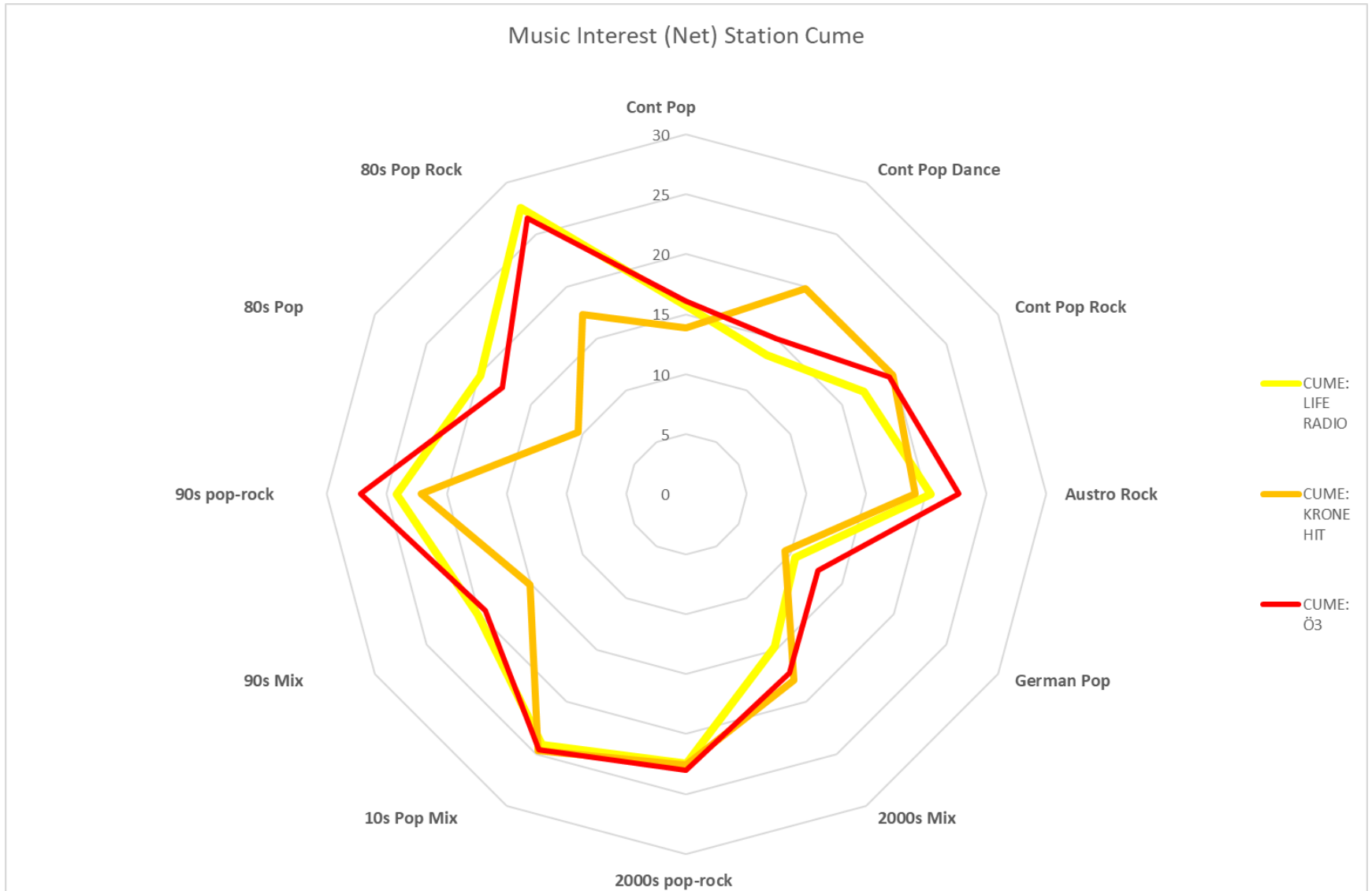
# Montages

## Montages: WHK Life Radio



## Montages - Association: Cume Life Radio





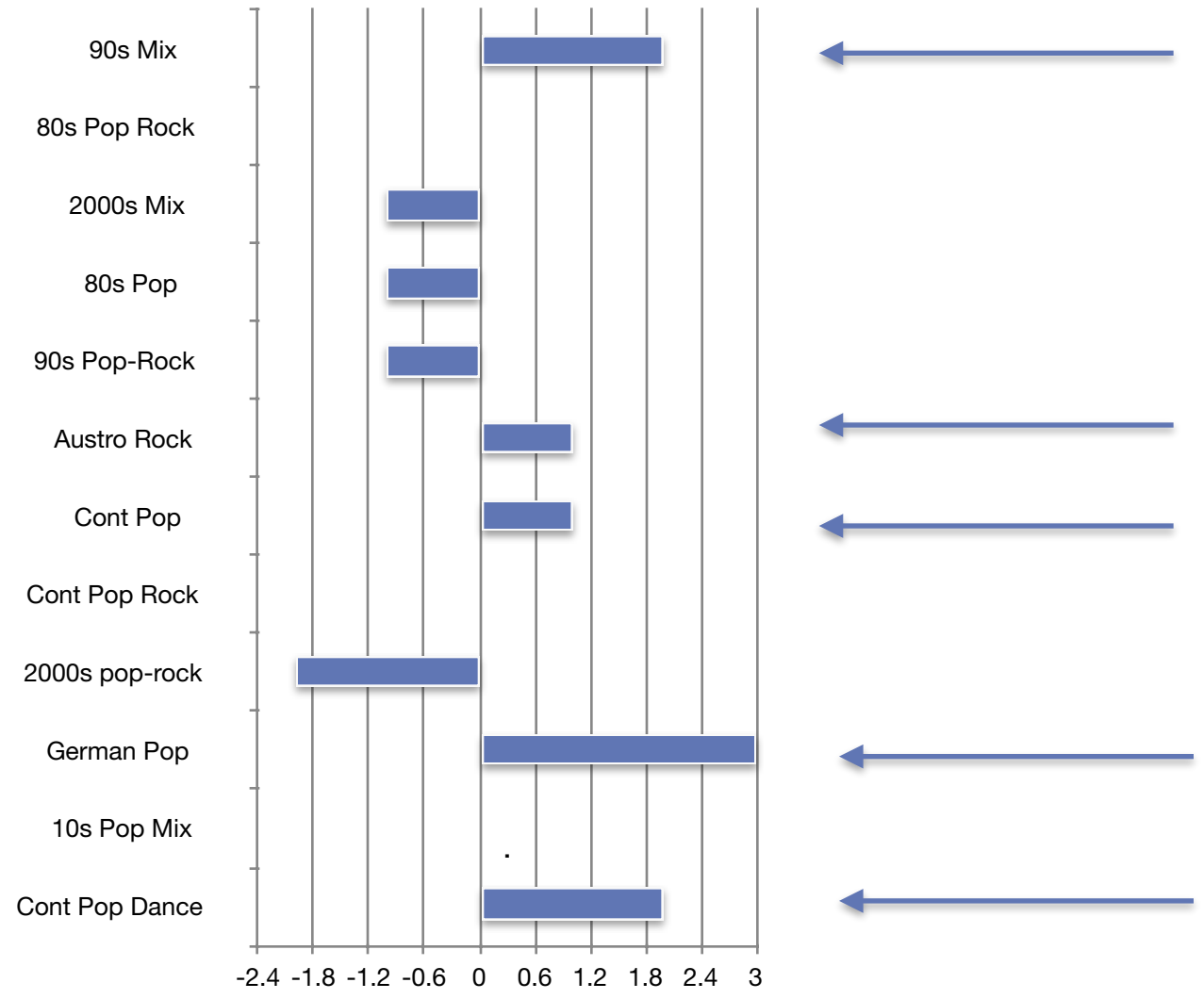
10 Feb 2020 TOTAL				
	sample size	Tune Off Change	Keep Listening	Dont Know
Neg: German Pop	349	58	34	8
Neg: Cont Pop Dance	338	50	41	10
Neg: Cont Pop	308	46	42	13
Neg: 80s Pop	289	45	40	16
Neg: Austro Rock	288	54	34	12
Neg: Cont Pop Rock	286	42	46	12
Neg: 90s Mix	284	37	50	12
Neg: 10s Pop Mix	280	41	47	12
Neg: 2000s Mix	273	39	47	14
Neg: 2000s pop-rock	271	40	46	14
Neg: 80s Pop Rock	249	48	37	15
Neg: 90s pop-rock	234	45	41	14

Montages listen in order of greatest negative reaction

# Association : Life Radio changes

February 2020

## WHK Life Radio



*WHK Music interest  
&  
station association*

- The chart below shows the appeal (net) among each station's cume (WHK) .... These have been updated since the last report. Note also that the results for Austro Rock are boosted by high results across most age groups

	LIFE RADIO		Ö3		KRONE HIT		RADIO ARABELLA
80s Pop Rock	28	Austro Rock	23	Cont Pop Dance	20	80s Pop	27
80s Pop	20	10s Pop Mix	18	Cont Pop Rock	20	80s Pop Rock	25
90s Pop-Rock	24	German Pop	13	2000s Mix	18	90s Mix	19
2000s Mix	15	Cont Pop Rock	20	Cont Pop	14	90s Pop-Rock	21
90s Mix	20	2000s Mix	17	10s Pop Mix	25	Austro Rock	19
2000s pop-rock	23	2000s pop-rock	23	German Pop	10	2000s pop-rock	18
Cont Pop	16	Cont Pop Dance	15	2000s pop-rock	23	10s Pop Mix	22
Austro Rock	20	Cont Pop	16	90s Pop-Rock	22	Cont Pop	8
Cont Pop Rock	17	90s Pop-Rock	27	80s Pop Rock	17	German Pop	7
10s Pop Mix	24	90s Mix	19	90s Mix	15	2000s Mix	9
German Pop	11	80s Pop Rock	27	Austro Rock	19	Cont Pop Rock	13
Cont Pop Dance	13	80s Pop	18	80s Pop	10	Cont Pop Dance	-2

\* results greater than 20%

# Montage association 2020

- The chart below shows station association for each music type among the station's cume (WHK) .. Ö3 dominates a wide range of music associations among its own cume - the station is 'weakest' in older music types especially 80s and 90s. Life Radio has good music associations from current pop to 90s and 80s among its cume.

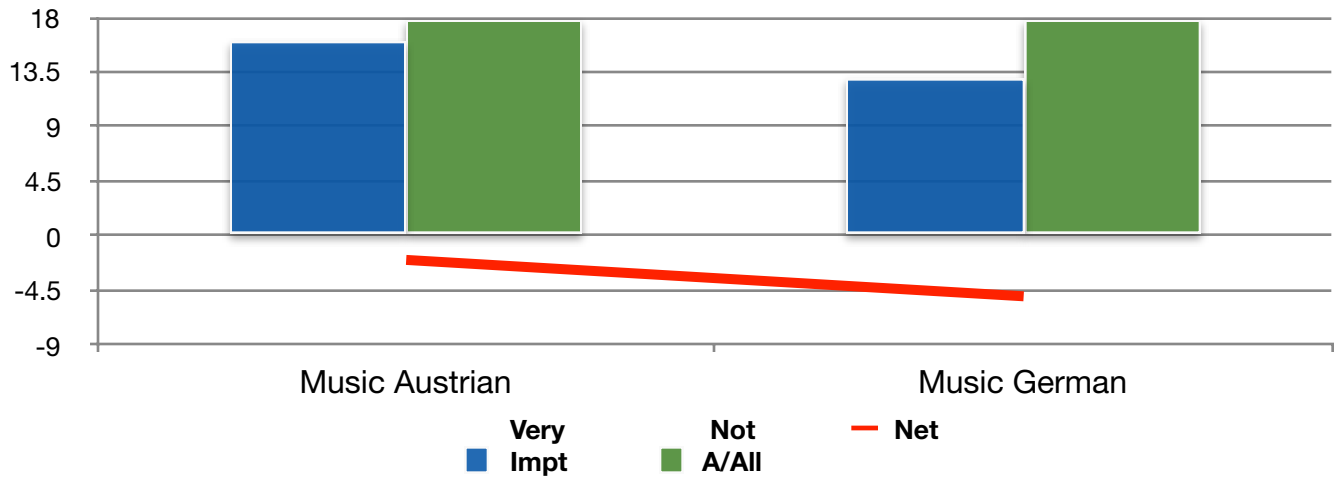
	LIFE RADIO		Ö3		KRONE HIT		RADIO ARABELLA
80s Pop Rock	34	Austro Rock	51	Cont Pop Dance	35	80s Pop	35
80s Pop	32	10s Pop Mix	50	Cont Pop Rock	30	80s Pop Rock	26
90s Pop-Rock	32	German Pop	50	2000s Mix	25	90s Mix	24
2000s Mix	33	Cont Pop Rock	48	Cont Pop	23	90s Pop-Rock	18
90s Mix	35	2000s Mix	47	10s Pop Mix	26	Austro Rock	12
2000s pop-rock	29	2000s pop-rock	47	German Pop	22	2000s pop-rock	14
Cont Pop	31	Cont Pop Dance	46	2000s pop-rock	21	10s Pop Mix	9
Austro Rock	32	Cont Pop	47	90s Pop-Rock	19	Cont Pop	11
Cont Pop Rock	29	90s Pop-Rock	41	80s Pop Rock	10	German Pop	10
10s Pop Mix	25	90s Mix	36	90s Mix	15	2000s Mix	12
German Pop	28	80s Pop Rock	34	Austro Rock	14	Cont Pop Rock	10
Cont Pop Dance	21	80s Pop	27	80s Pop	8	Cont Pop Dance	3

\* results 1.greater than 40%

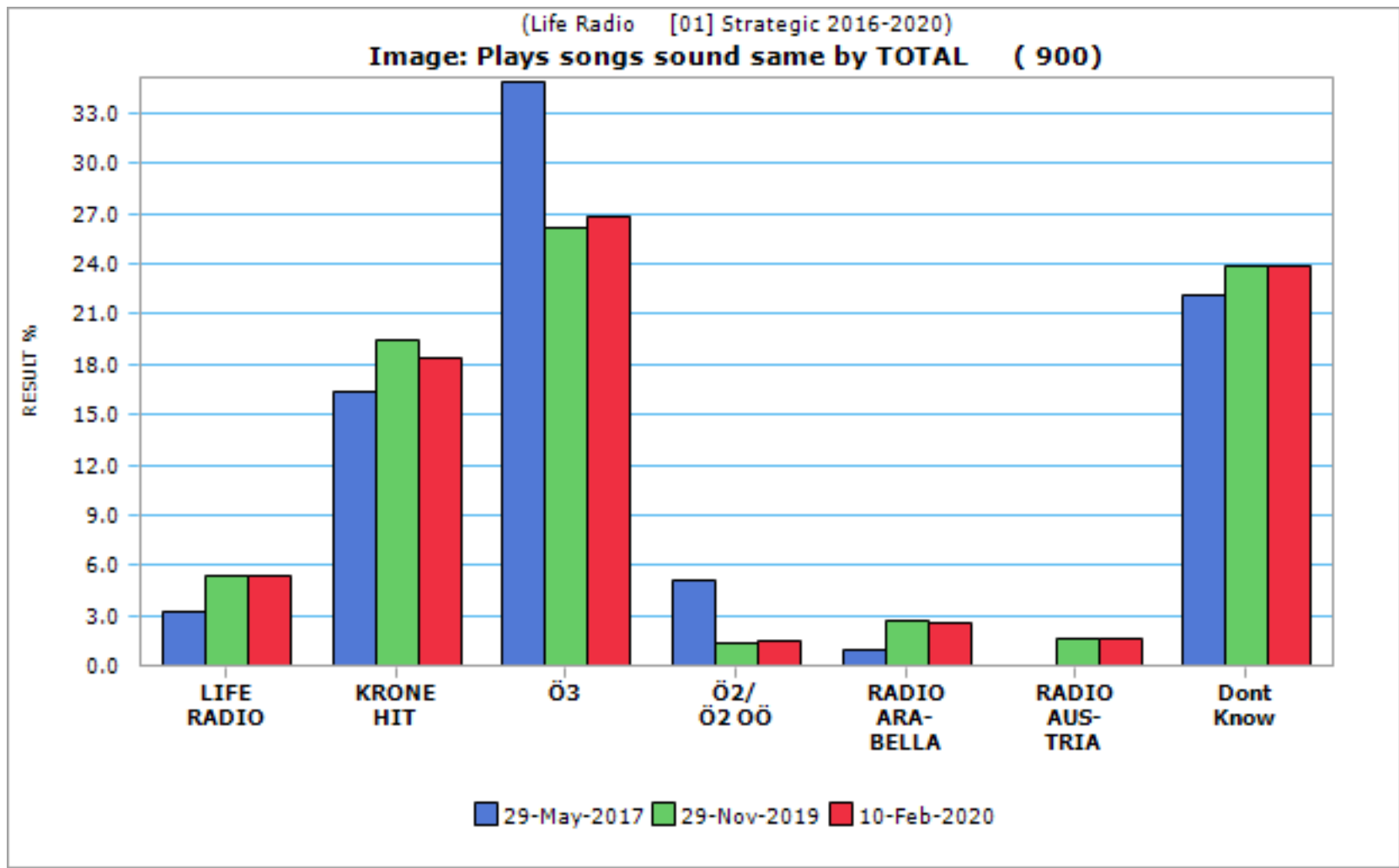
\* results 2 between 30% - 40%

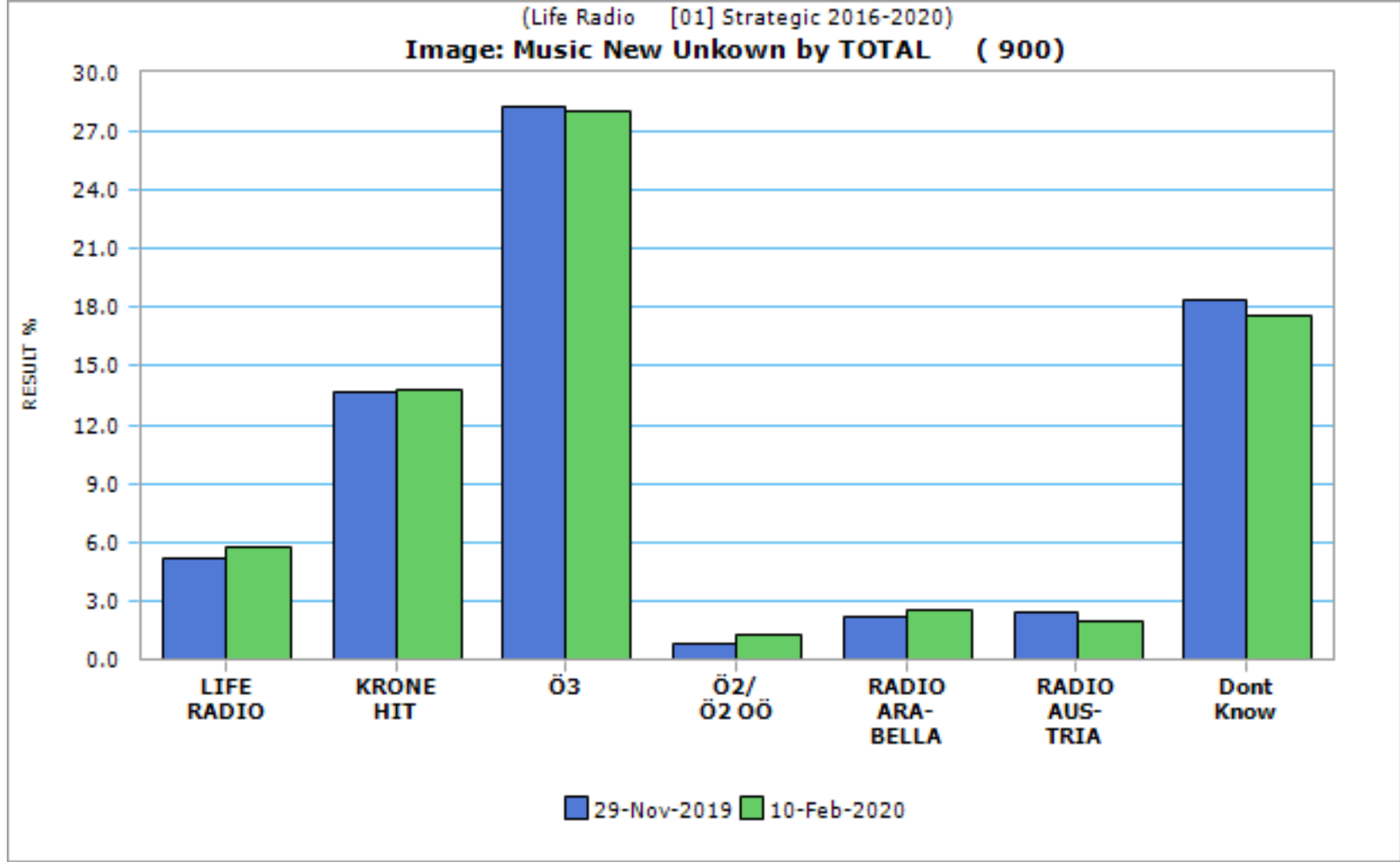


## Austrian - German music



10-Feb-2020 TOTAL							
	LIFE RADIO	KRONE HIT	Ö3	Ö2/ Ö2 OÖ	ÖSTER REICH 1	RADIO ARA-BELLA	Dont Know
Music German	9	5	19	22	2	5	24
Music Austrian	9	6	18	23	3	5	22



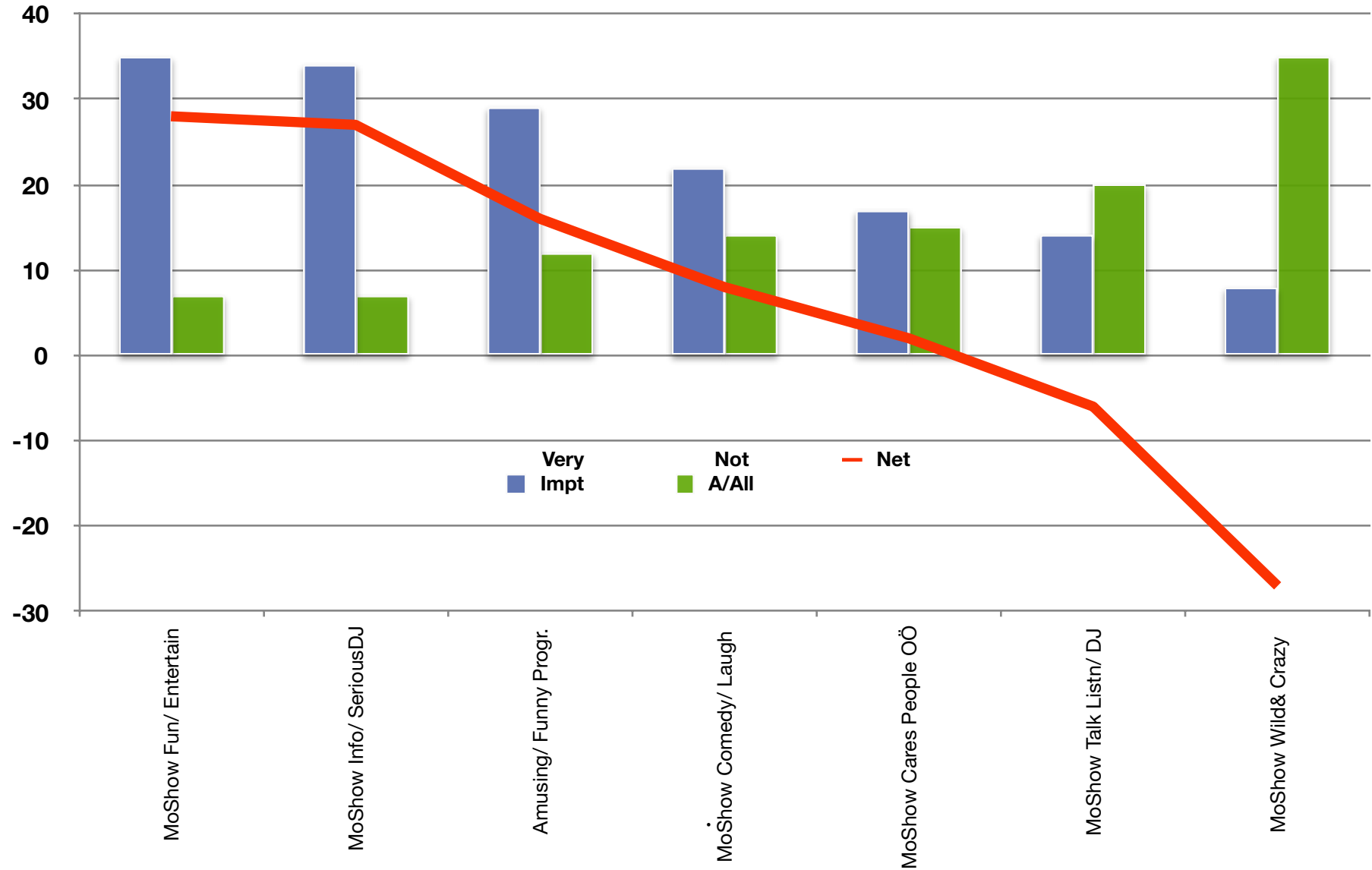


## Key outcomes: 2020

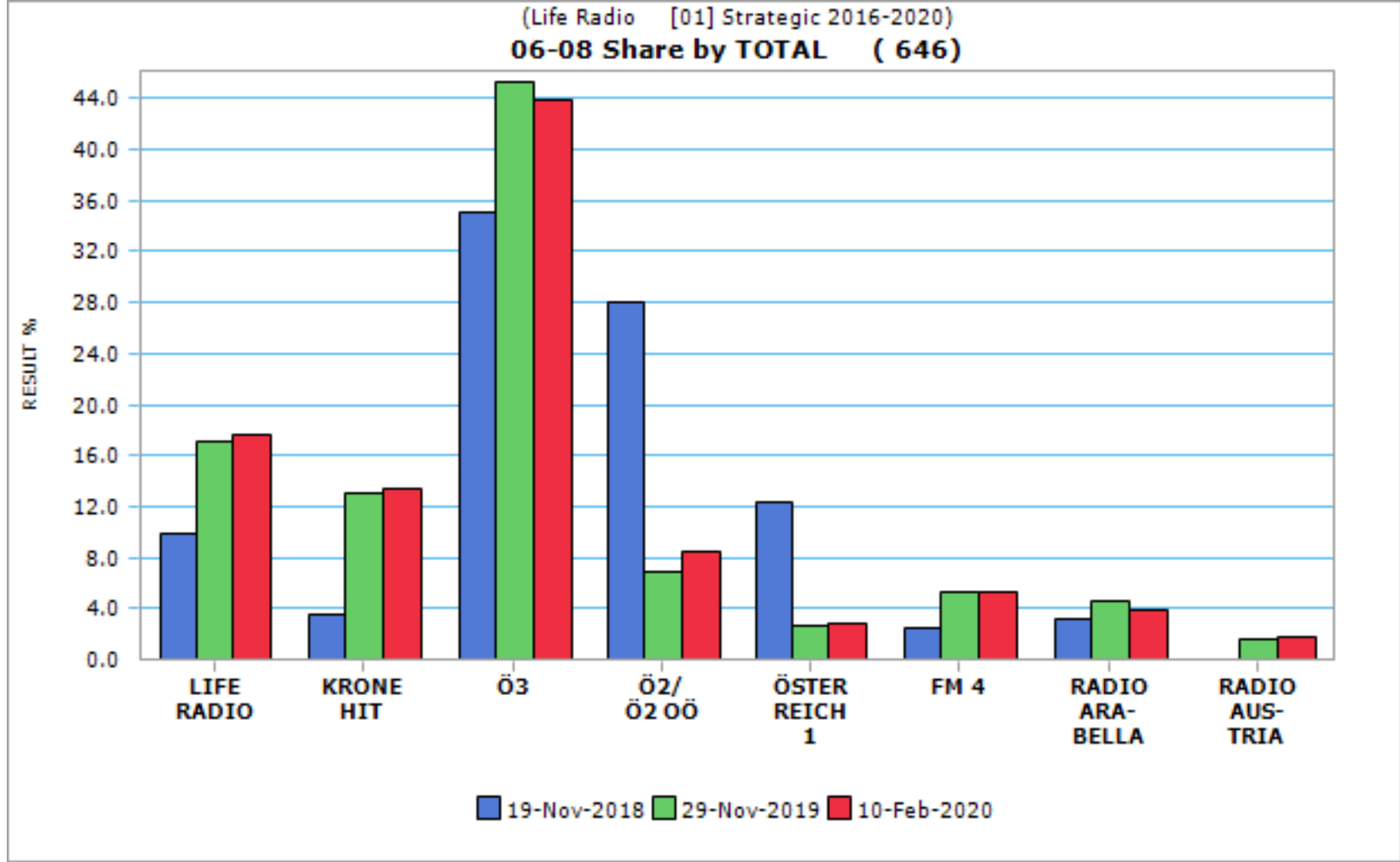
- Ö3 still dominates and is associated with most of the music segments, both in the market and among its cume. Life Radio however does have a very broad music association - stronger among older 90s and 80s.
- Because the station is more clearly associated with older music it is less aligned with the music interests of the under 30 listeners - however the highest passion for a number of contemporary music types comes from the 14-19 age group
- The music mix is still a power idea and a positive identity for Life Radio however this **must** be anchored in current hits, Life Radio is not an oldies or nostalgia station. Older music helps create the mix, adding the USP to the static's music position.
- Ö3 is most associated with contemporary music segments and dominates most of these, including pop-dance.
- German pop tests only moderately well and is polarising - the appeal of this music type seems to be diminishing and becoming older

# *Morning Show*

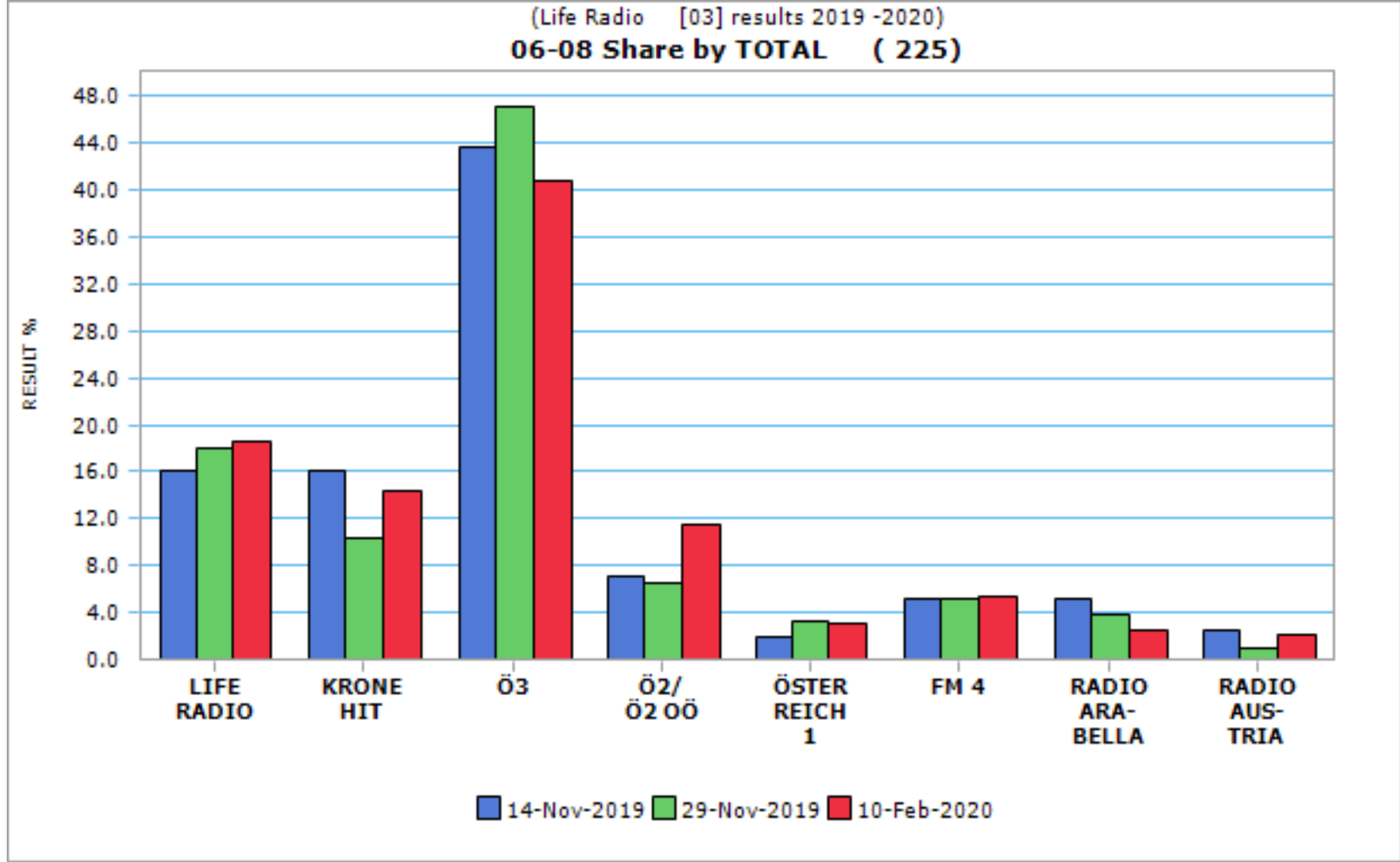
## Important: Morning Show Style - Total



# Daypart Listening shares

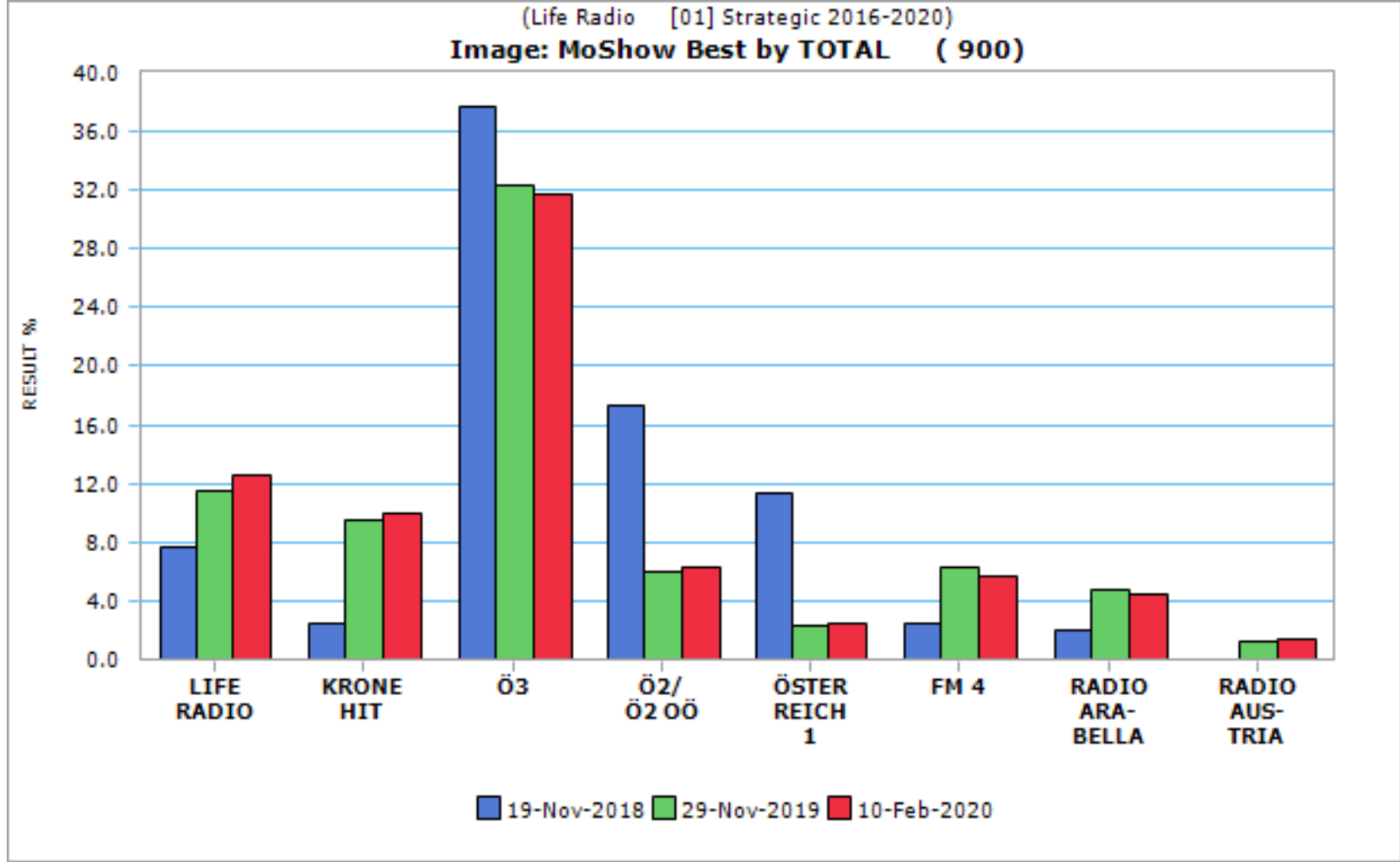


These trends still show the contrast between the CATI and the online results but also show a stronger result for Life Radio



The individual monthly samples do show some changes especially for Ö3

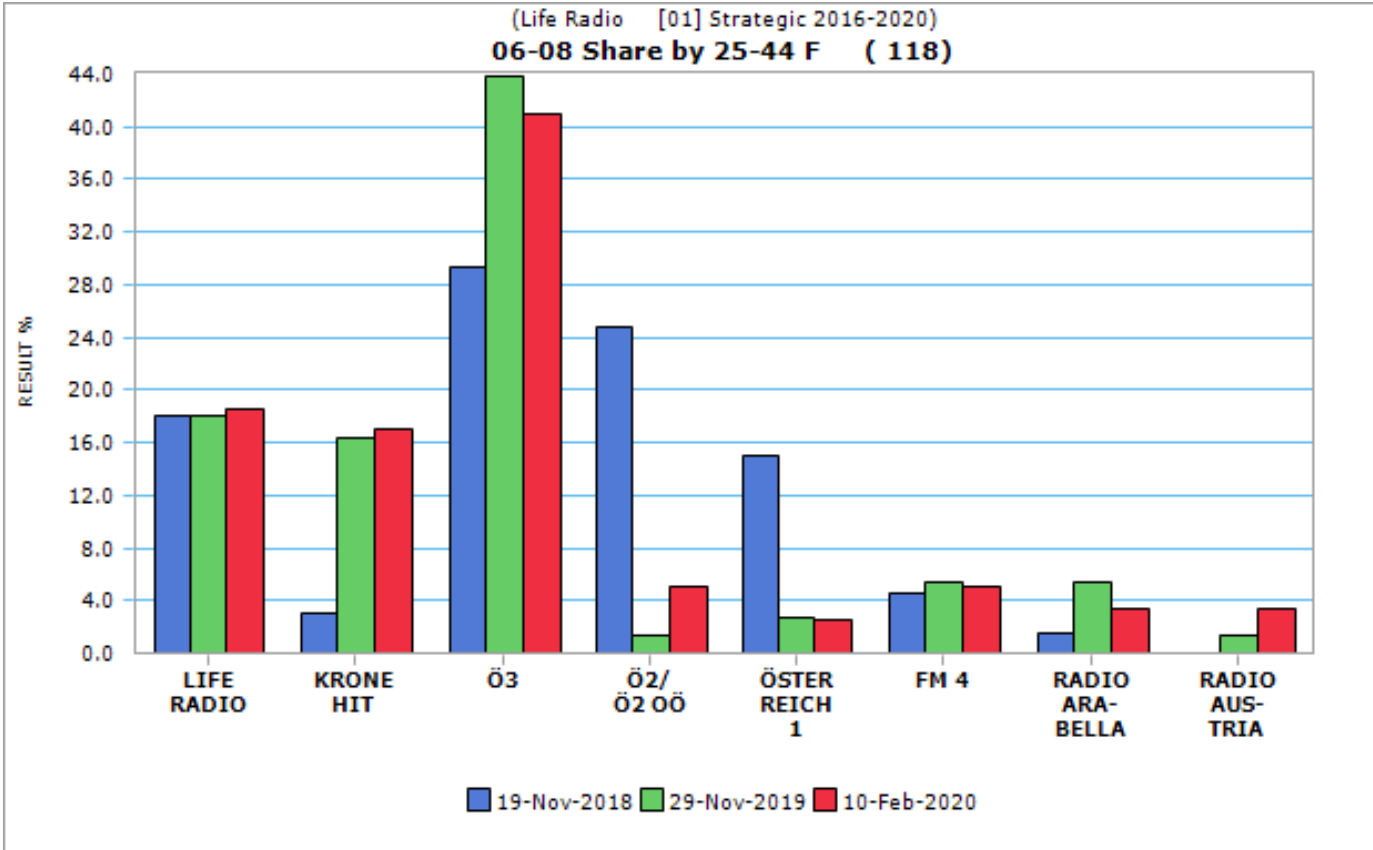




Small but positive changes for Life Radio - the gap for Ö3 is still substantial

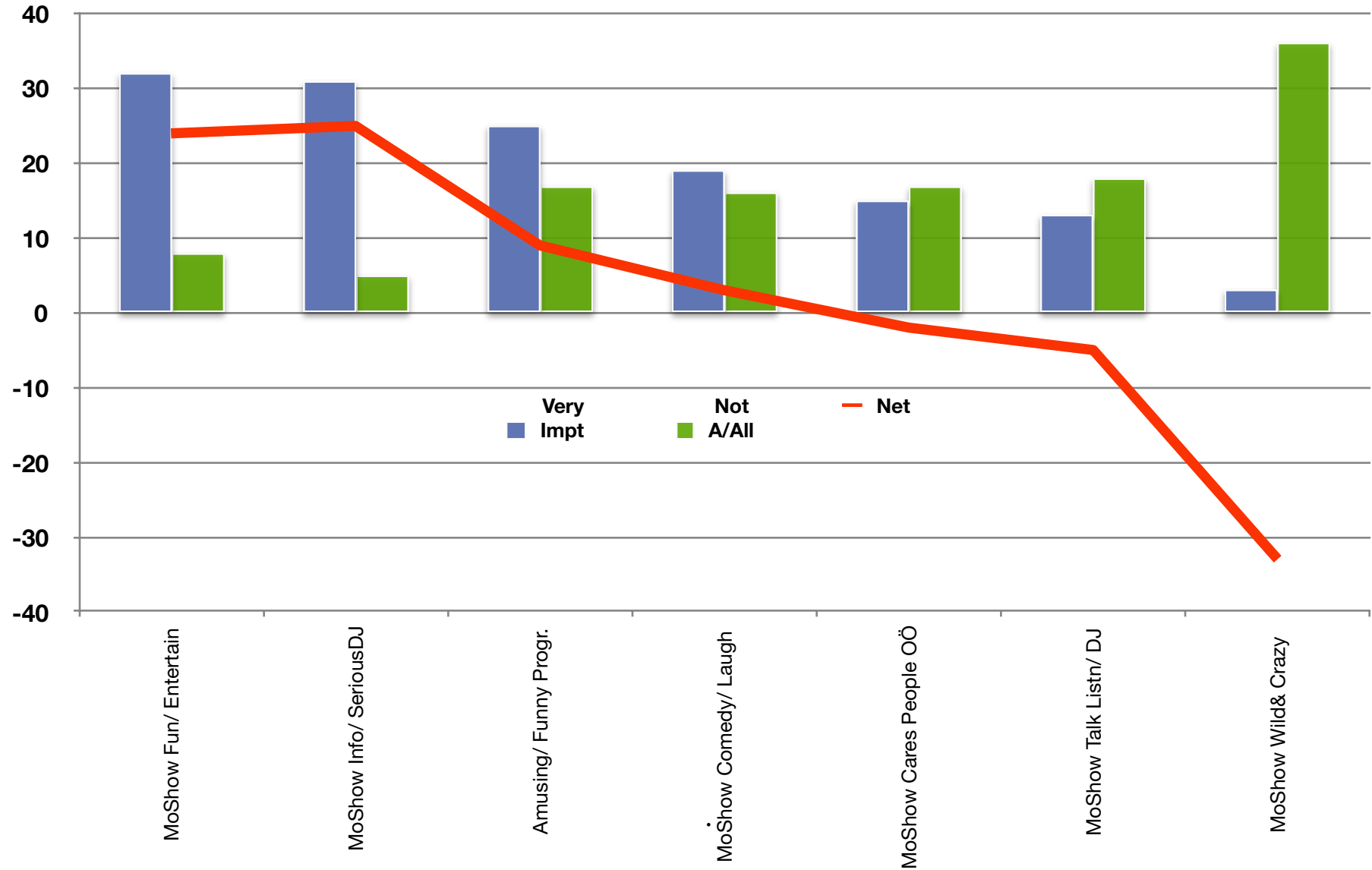
# Morning Show Images: total February 2020

	LIFE RADIO	KRONE HIT	Ö3	Ö2/ Ö2 OÖ	ÖSTER REICH 1	RADIO ARA-BELLA	Dont Know
MoShow Fun/ Entertain	15	10	34	4	1	1	19
MoShow Best	13	10	32	6	2	4	13
Reliable Traffic	12	7	57	6	1	1	8
MoShow Good Information	12	8	38	9	5	2	13
MoShow Probl People OÖ	12	4	18	19	1	2	29
Best Amusing/ Funny Prg	11	13	36	3	1	1	19
Reliable Weather	10	7	42	9	2	2	17
MoShow Comedy/ Laugh	9	9	37	1	1	2	25
MoShow Info/ SeriousDJ	9	5	33	9	8	2	18
MoShow Talk Listn/ DJ	8	6	26	10	4	1	26
MoShow Wild& Crazy	7	13	22	1	1	2	37

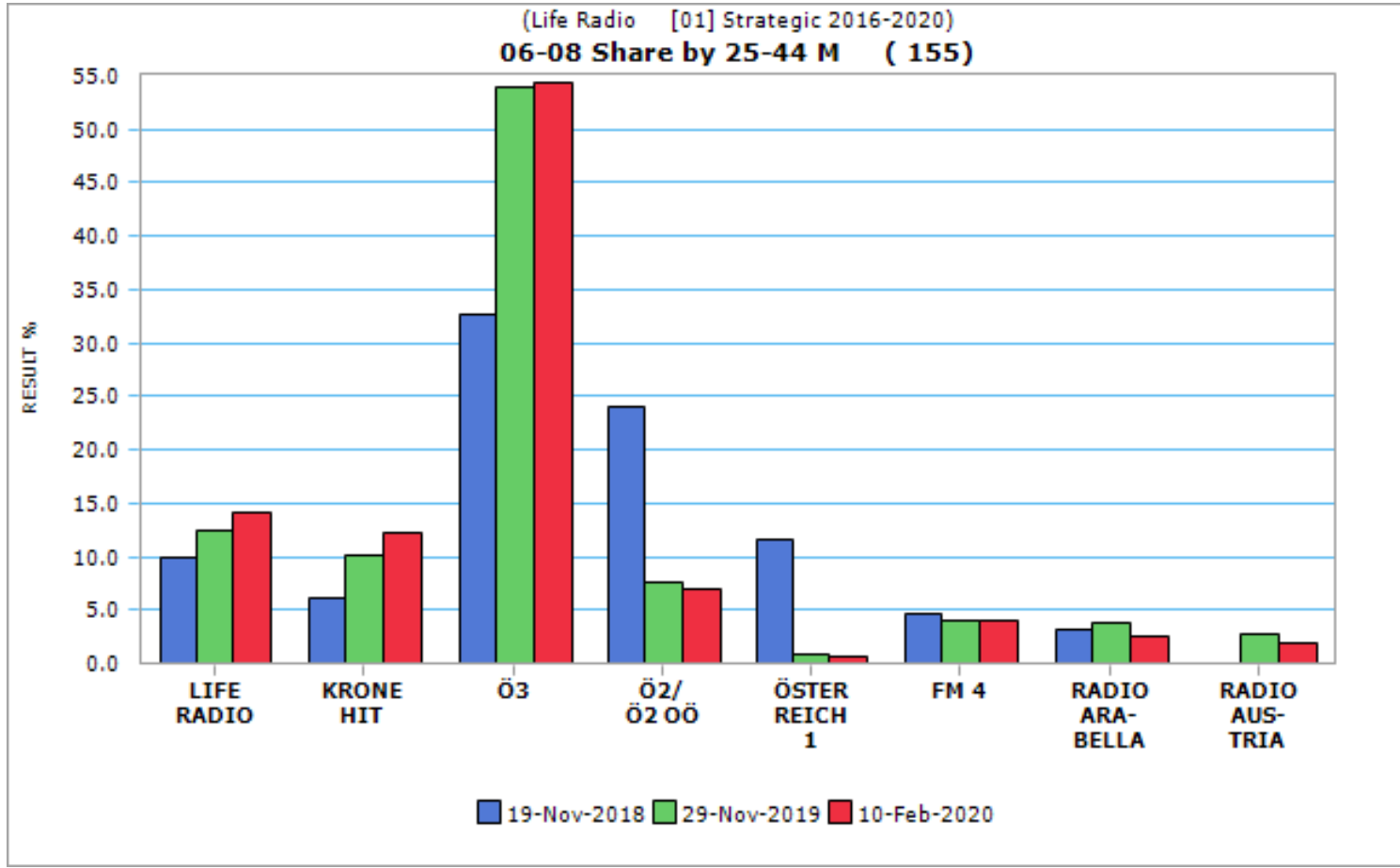


In this age group, results for Life Radio and Krone Hit are close

Important: Morning Show Style - 25-44F

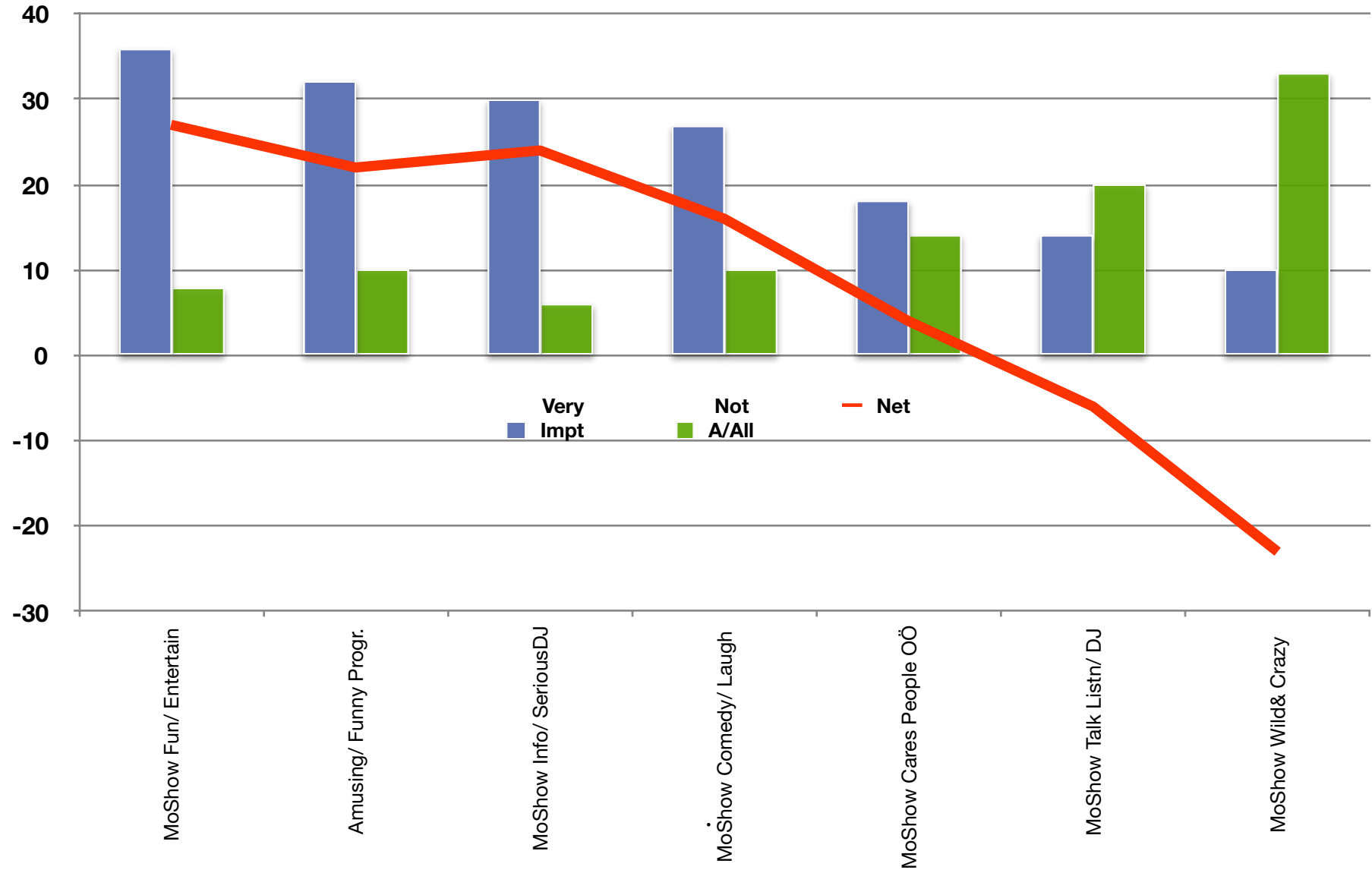


	LIFE RADIO	KRONE HIT	Ö3	Ö2/ Ö2 OÖ	ÖSTER REICH 1	RADIO ARA-BELLA	Dont Know
Reliable Traffic	16	8	54	3	1	1	10
MoShow Fun/ Entertain	15	16	34	1	0	1	20
Reliable Weather	14	11	44	6	2	1	15
MoShow Good Information	13	12	42	6	4	1	13
MoShow Probl People OÖ	13	5	24	12	1	1	34
MoShow Best	12	14	34	3	2	4	14
MoShow Talk Listn/ DJ	11	6	33	4	3	1	29
Best Amusing/ Funny Prg	10	20	38	2	1	1	16
MoShow Info/ SeriousDJ	9	9	38	5	6	1	21
MoShow Comedy/ Laugh	6	15	39	0	1	1	27
MoShow Wild& Crazy	5	20	25	0	0	1	38



In this age group, results for Life Radio and Krone Hit are close

Important: Morning Show Style - 25-44M



	LIFE RADIO	KRONE HIT	Ö3	Ö2/ Ö2 OÖ	ÖSTER REICH 1	RADIO ARA-BELLA	Dont Know
MoShow Probl People OÖ	13	4	22	16	1	3	23
MoShow Fun/ Entertain	12	9	39	4	1	2	13
Reliable Weather	10	7	45	10	3	2	13
MoShow Good Information	9	6	43	9	6	1	10
Reliable Traffic	9	6	66	5	3	0	5
MoShow Comedy/ Laugh	9	7	44	2	3	2	15
MoShow Best	9	10	37	5	2	3	13
MoShow Info/ SeriousDJ	8	5	39	8	6	3	12
MoShow Wild& Crazy	7	15	24	2	2	1	28
Best Amusing/ Funny Prg	6	12	42	4	2	2	13
MoShow Talk Listn/ DJ	5	6	29	10	5	2	20



## 2020

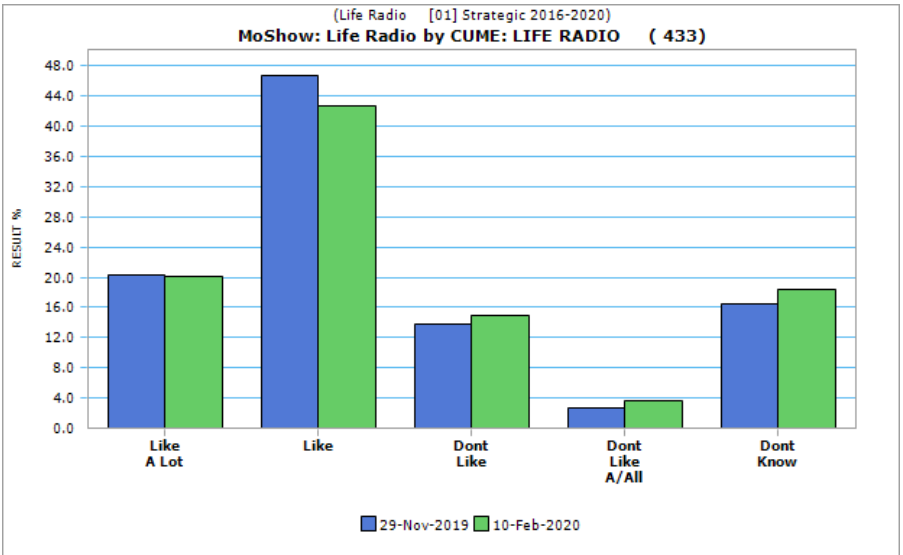
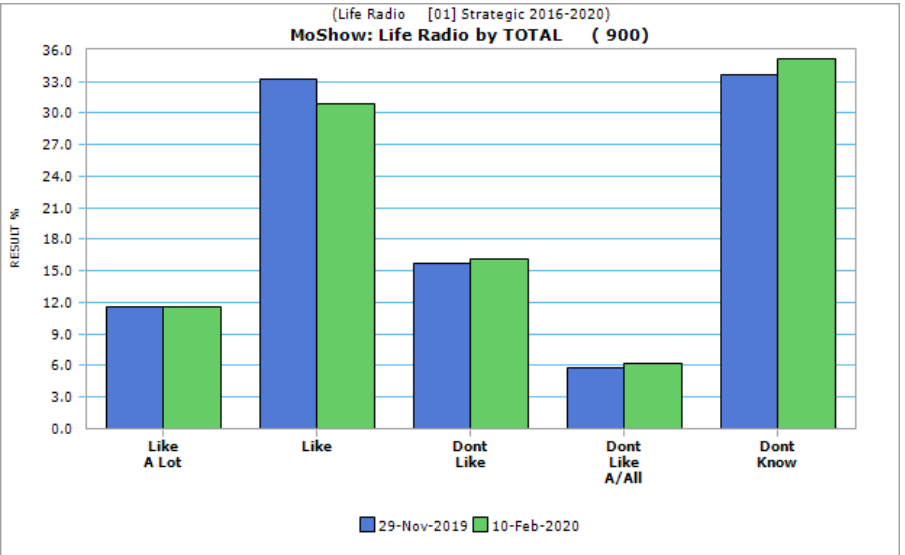
- Morning show images are dominated by O3 there is little clear positioning strength for Life Radio this is particularly the case among 25-44 males
- Until Life Radio can establish a clearer USP for its morning show, the station will be playing catch up in many other product areas - music positioning helps but is not the complete answer.
- The table below highlights the age groups identifying most with each station (relative to total)

10-Feb-2020 Image: Best Cont. Your Sex/Age							
	LIFE RADIO	Ö3	KRONE HIT	Ö2/Ö2 OÖ	ÖSTERREICH 1	RADIO ARABELLA	RADIO AUSTRIA
TOTAL	12	23	12	8	2	4	2
14-24	10	29	22	0	1	1	2
25-34	13	24	21	4	2	1	4
35-44	14	28	7	6	1	3	2
45-54	14	17	7	11	3	8	1
55-59	7	10	0	29	7	6	0

February 2020 TOTAL					
	Like A Lot	Like	Dont Like	Dont Like A/All	Dont Know
Der Elternsprechtag	12	16	11	10	51
Songs Mit Geschichte	12	26	7	4	51
Das JEIN Spiel	7	18	11	8	56
Die Frage Der Moral	6	14	10	8	62
February 2020 CUME: LIFE RADIO					
	Like A Lot	Like	Dont Like	Dont Like A/All	Dont Know
Der Elternsprechtag	19	21	15	13	33
Songs Mit Geschichte	19	32	8	3	38
Das JEIN Spiel	11	27	15	10	37
Die Frage Der Moral	11	19	12	10	49

Passion scores among the stations cume are relatively low, unfamiliarity is high.

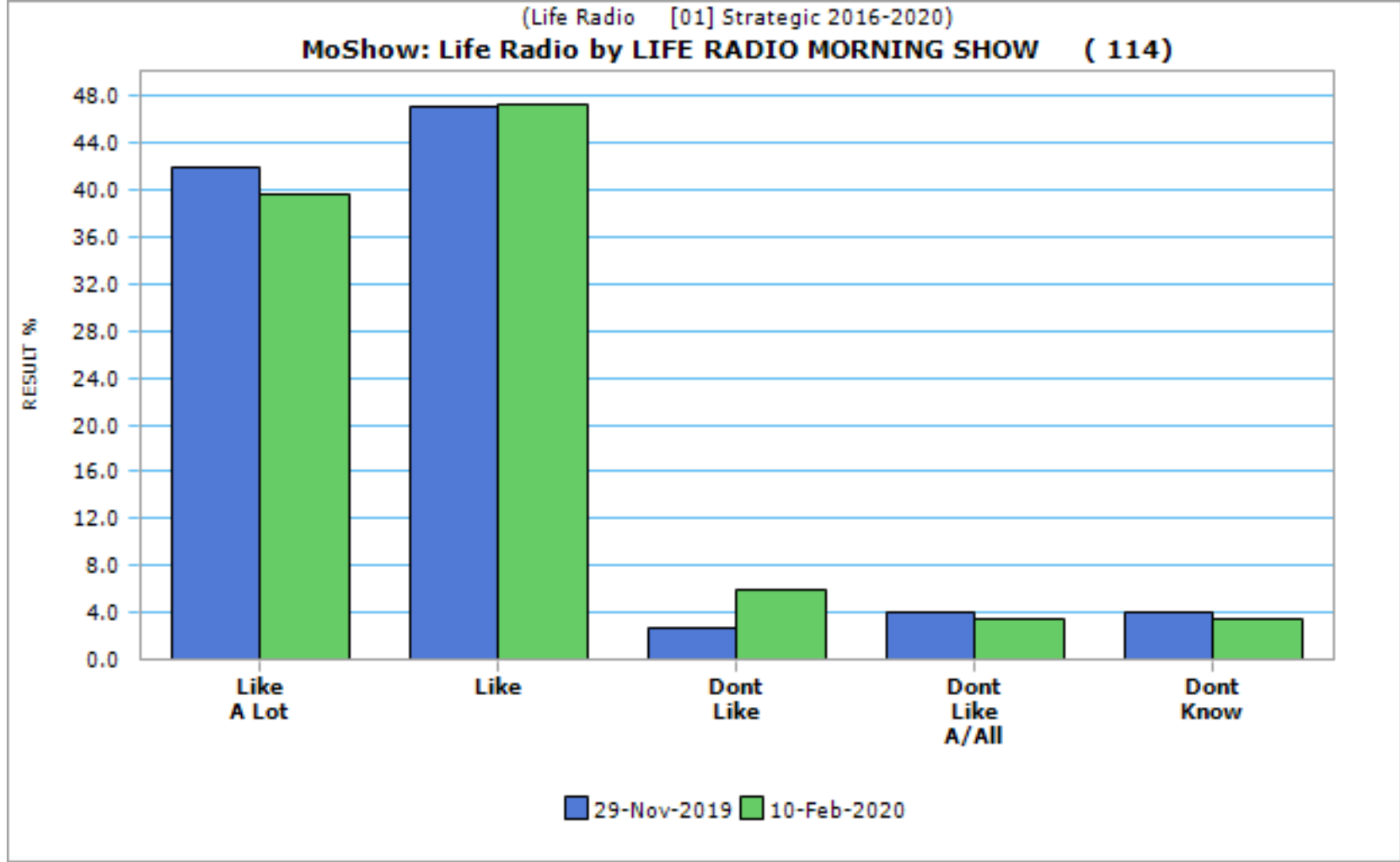
February 2020 TOTAL					
	LIFE RADIO	KRONE HIT	Ö3	RADIO ARABELLA	Dont Know
Der Elternsprechtag	24	4	10	1	53
Das JEIN Spiel	22	4	7	1	58
Songs Mit Geschichte	16	2	10	2	60
Die Frage Der Moral	16	4	7	1	65
February 2020 25-44					
	LIFE RADIO	KRONE HIT	Ö3	RADIO ARABELLA	Dont Know
Der Elternsprechtag	25	3	11	1	51
Das JEIN Spiel	23	4	7	1	56
Songs Mit Geschichte	17	2	10	2	59
Die Frage Der Moral	16	5	7	1	64
February 2020 CUME: LIFE RADIO					
	LIFE RADIO	KRONE HIT	Ö3	RADIO ARABELLA	Dont Know
Der Elternsprechtag	42	3	11	1	36
Das JEIN Spiel	39	5	8	0	41
Songs Mit Geschichte	28	2	12	2	47
Die Frage Der Moral	28	5	9	0	52



# Morning Show Rate - STATION

February 2020 TOTAL					
	Like A Lot	Like	Dont Like	Dont Like A/All	Dont Know
MoShow: Ö3	27	42	10	9	13
MoShow: Life Radio	12	31	16	6	35
MoShow: Radio OÖ	9	25	17	8	40
MoShow: Krone Hit	8	26	21	12	33
MoShow: FM 4	8	16	12	7	57
MoShow: Ö1	6	18	15	9	52
MoShow: Radio Arabella	5	24	15	5	51

# Morning Show Rate - STATION





# INFO - STATION



February 2020 TOTAL				
	Mostly Radio	Mostly Smart phone	Mostly TV	Other
Source: Traffic Information	81	15	1	3
Source: Weather Information	27	56	12	5



## Moderators

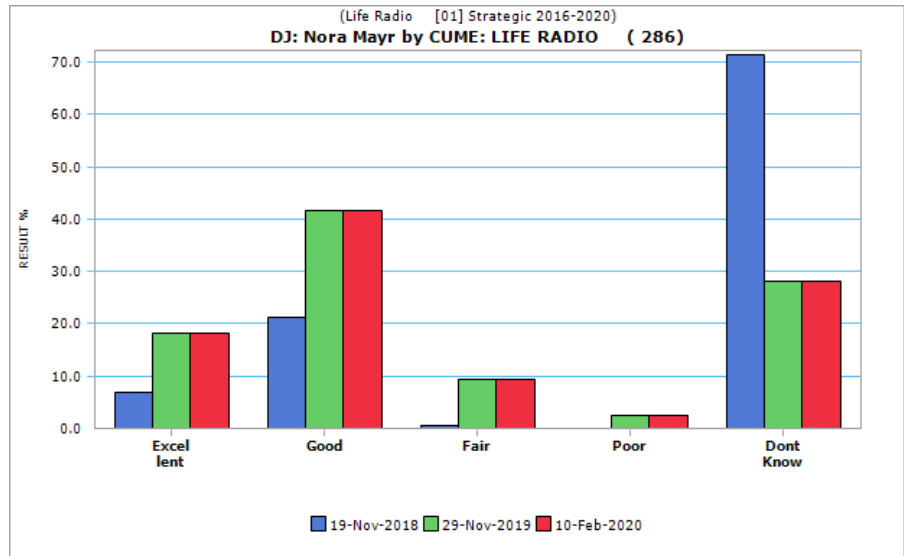
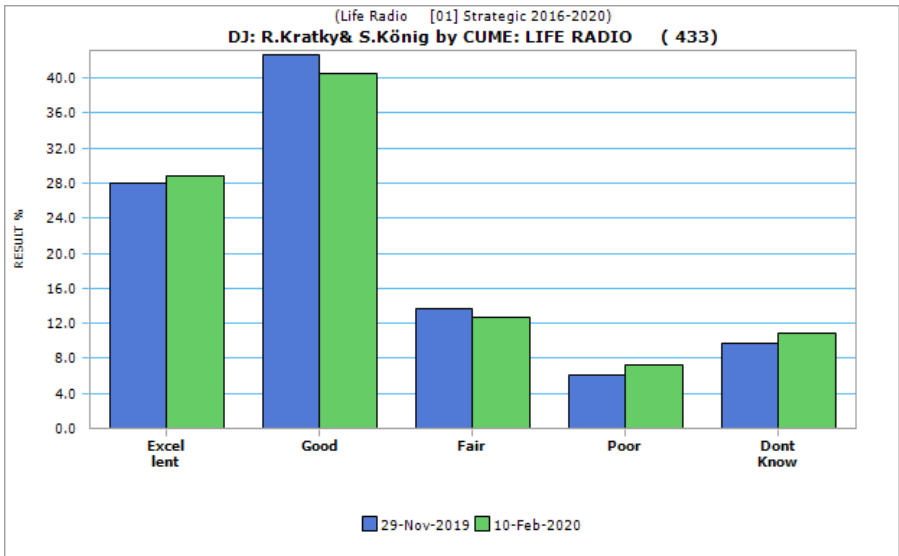


February 2020 - TOTAL					
	Excel lent	Good	Fair	Poor	Dont Know
R.Kratky& S.König	32	38	11	8	12
M.Knapp& A.Ableidinger	15	26	16	12	31
Nora Mayr	11	31	10	4	45
Silli Riegler	11	29	9	4	47
W.Haiml& N.Mayer	10	32	11	3	45
Christian Zöttel	9	31	10	3	47
Wolfgang Haiml	9	28	11	4	48

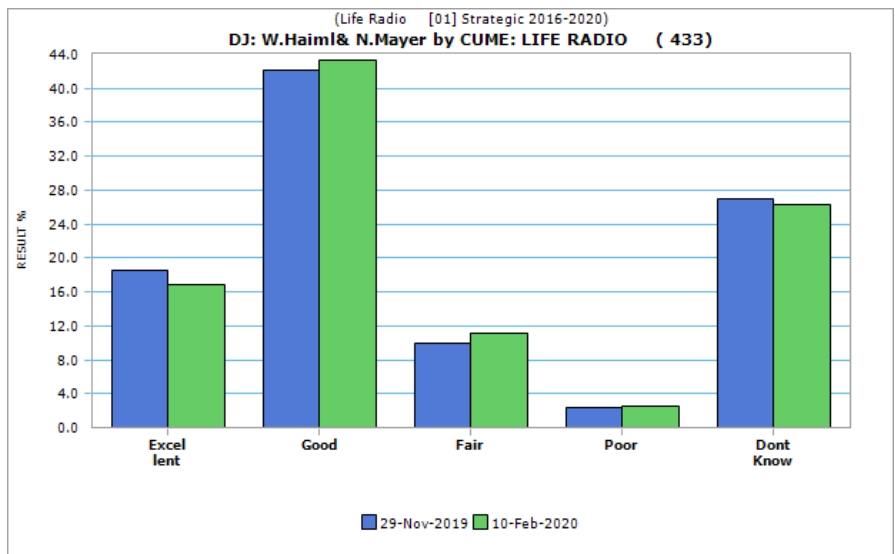
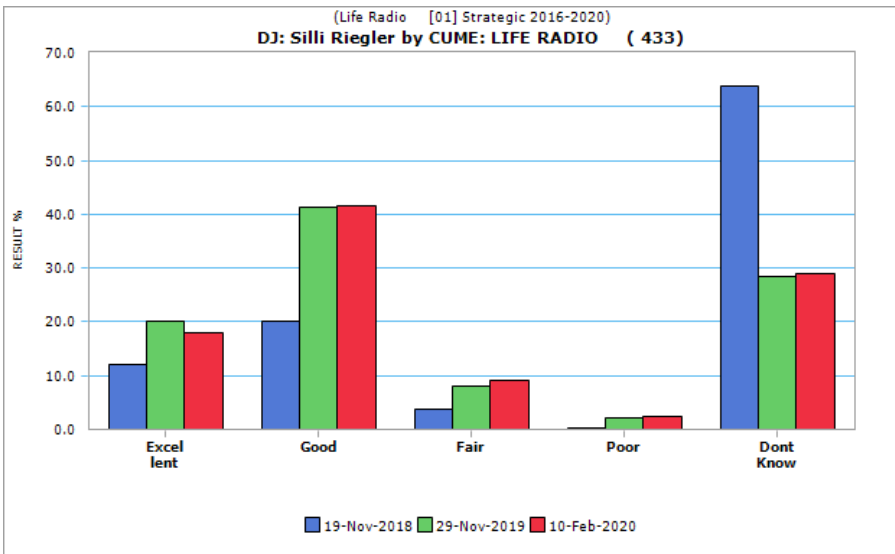
Trends on the following pages

February 2020 - LIFE RADIO CUME					
	Excel lent	Good	Fair	Poor	Dont Know
R.Kratky& S.König	29	41	13	7	11
Nora Mayr	18	42	9	2	28
Silli Riegler	18	42	9	2	29
W.Haiml& N.Mayer	17	43	11	2	26
M.Knapp& A.Ableidinger	16	27	17	13	26
Wolfgang Haiml	16	39	11	3	31
Christian Zöttel	15	43	12	2	28

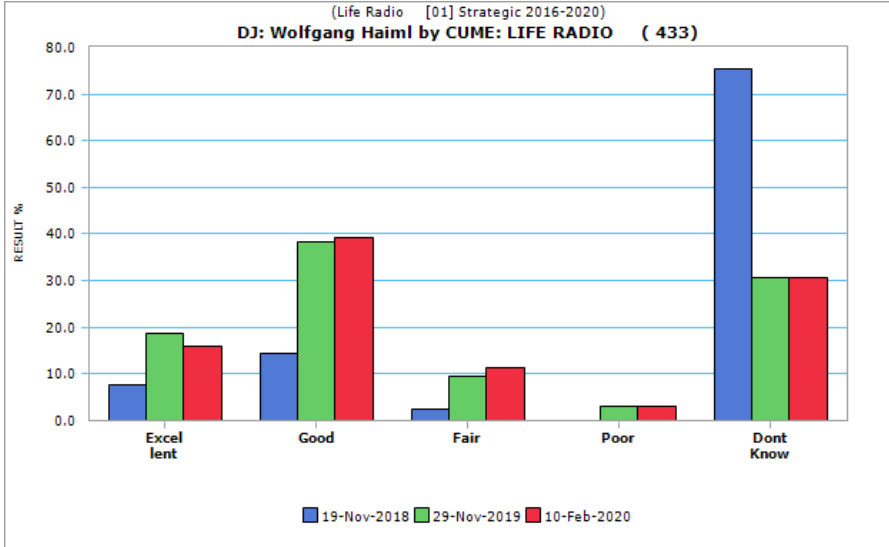
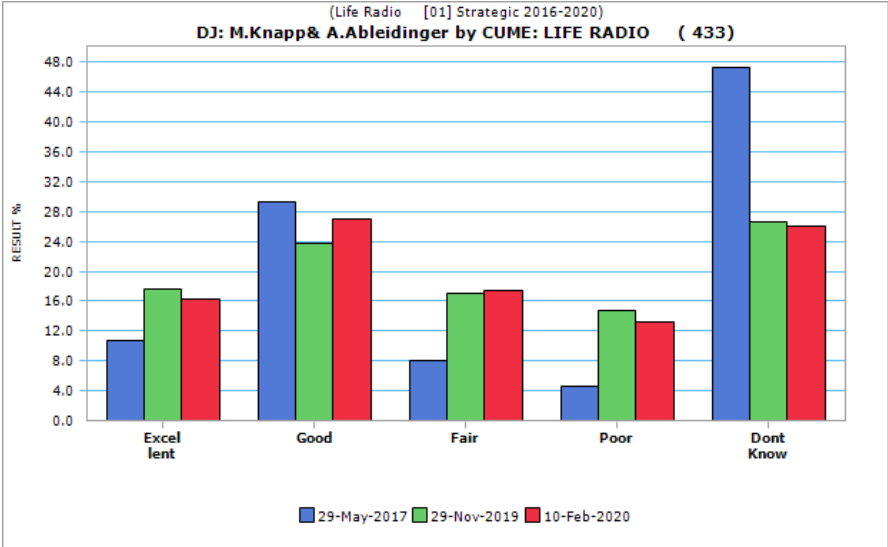
Trends on the following pages



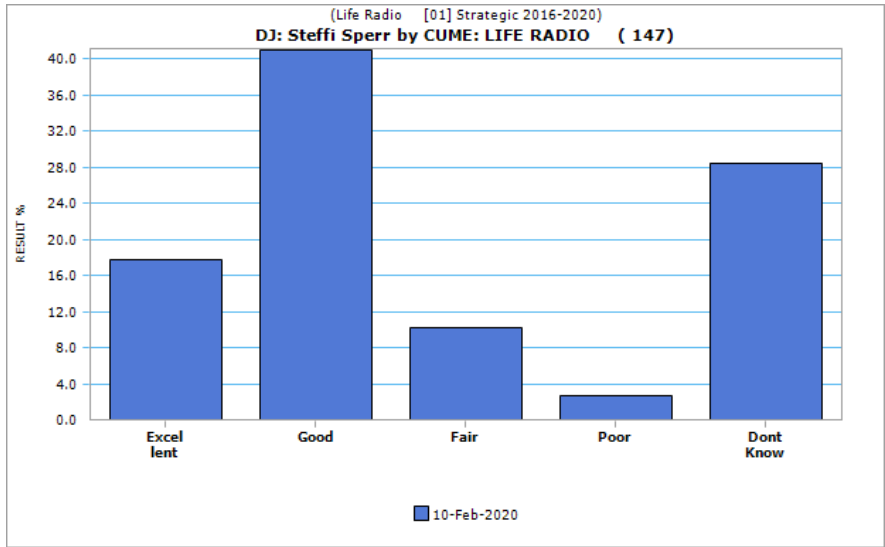
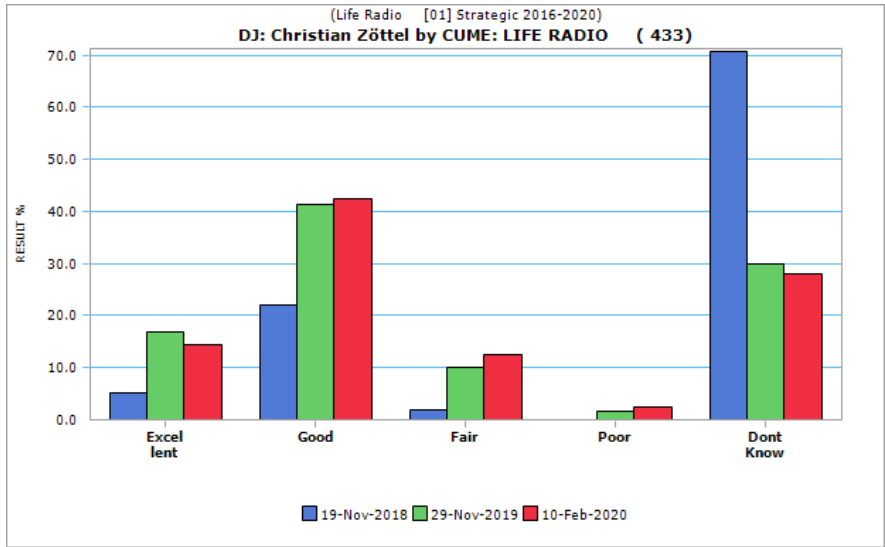
These are better results among the cume



These are better results among the cume



These are better results among the cume



These are better results among the cume

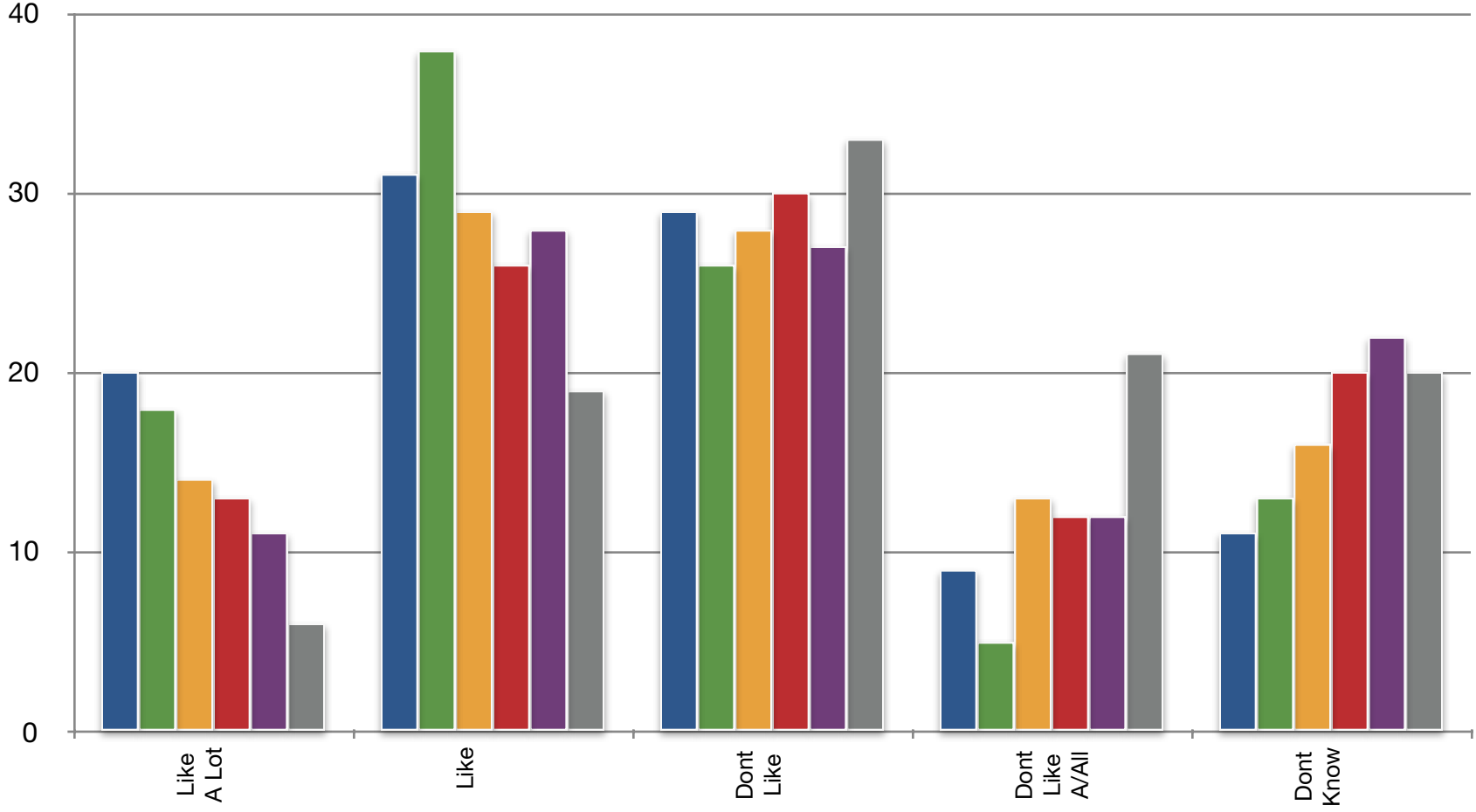


**Slogans, brand and other images**

Slogans TOTAL February 2020					
	Like A Lot	Like	Dont Like	Dont Like A/All	Dont Know
Die Meiste Musik	20	31	29	9	11
Der Perfekte Musikmix	18	38	26	5	13
Kultshits/ Beste Heute	14	29	28	13	16
Musik Musik Musik	13	26	30	12	20
Die Echte Abwechslung	11	28	27	12	22
Hier Spielt Mein Leben	6	19	33	21	20

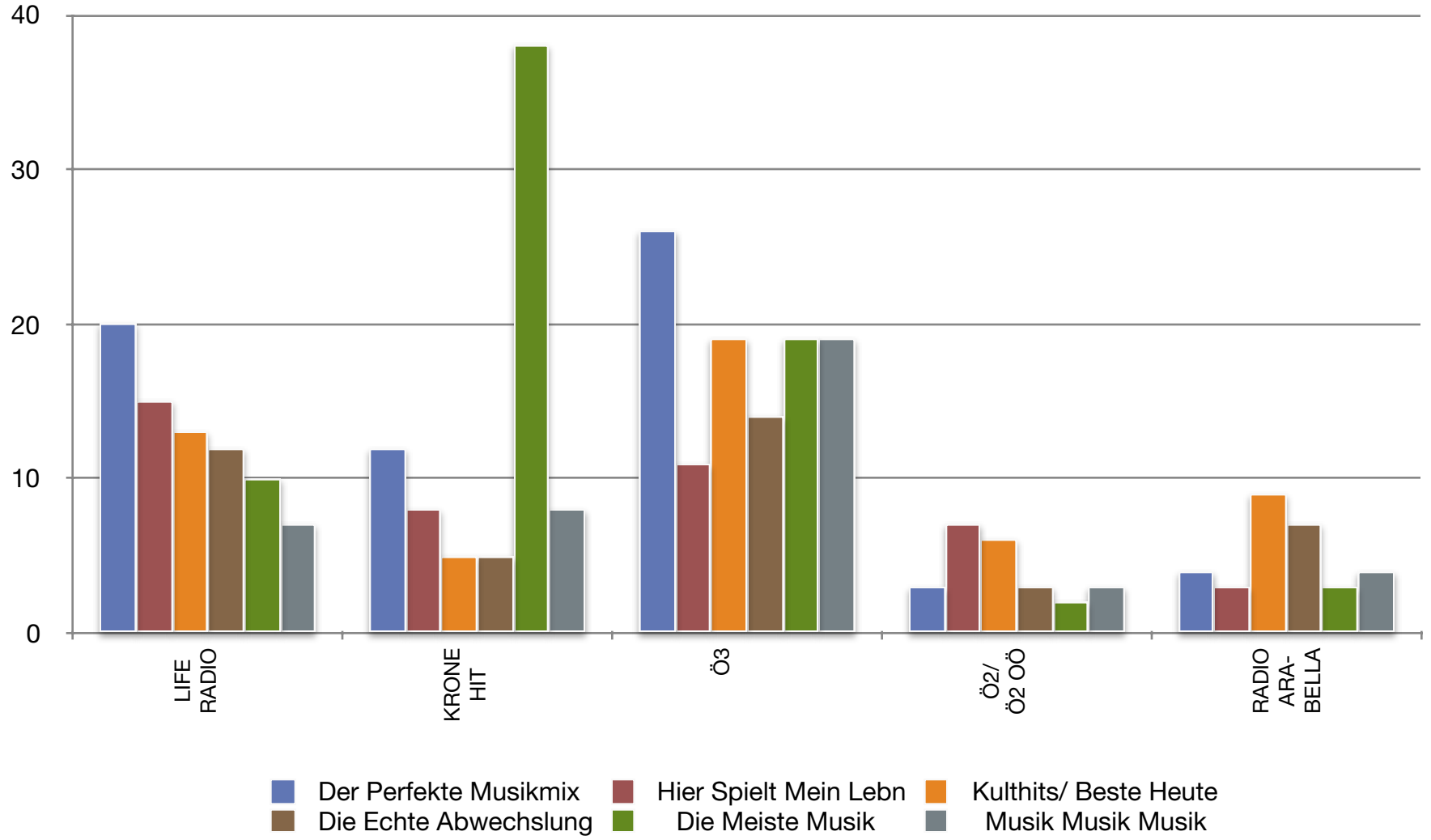


## Slogans: total

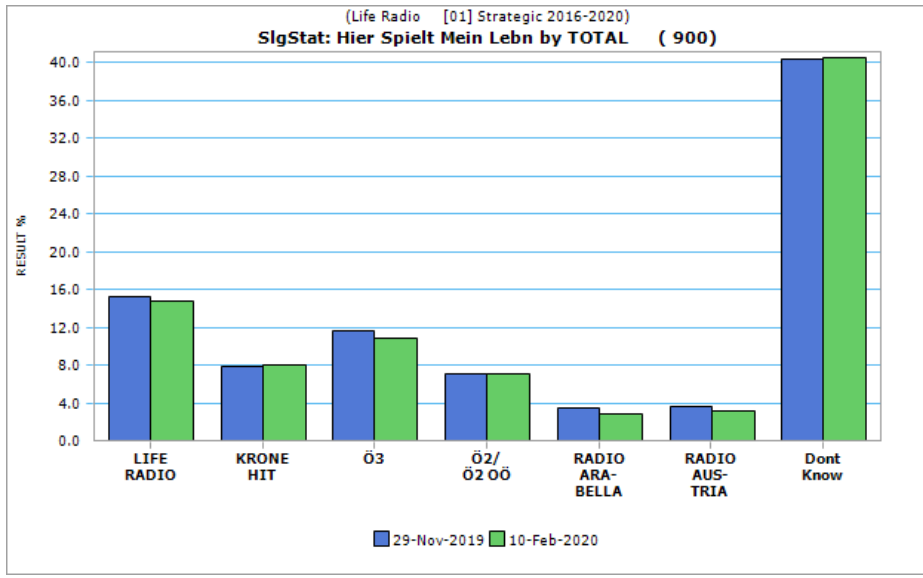
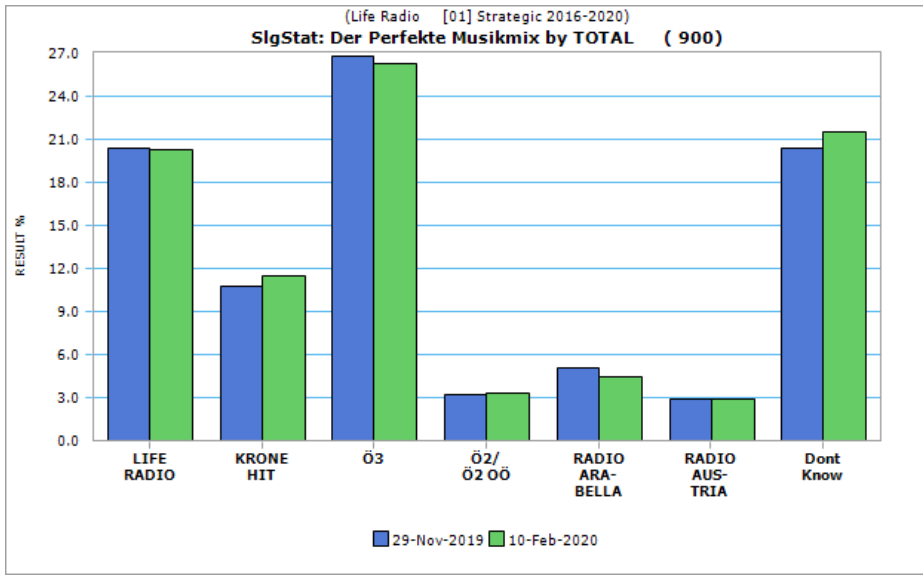


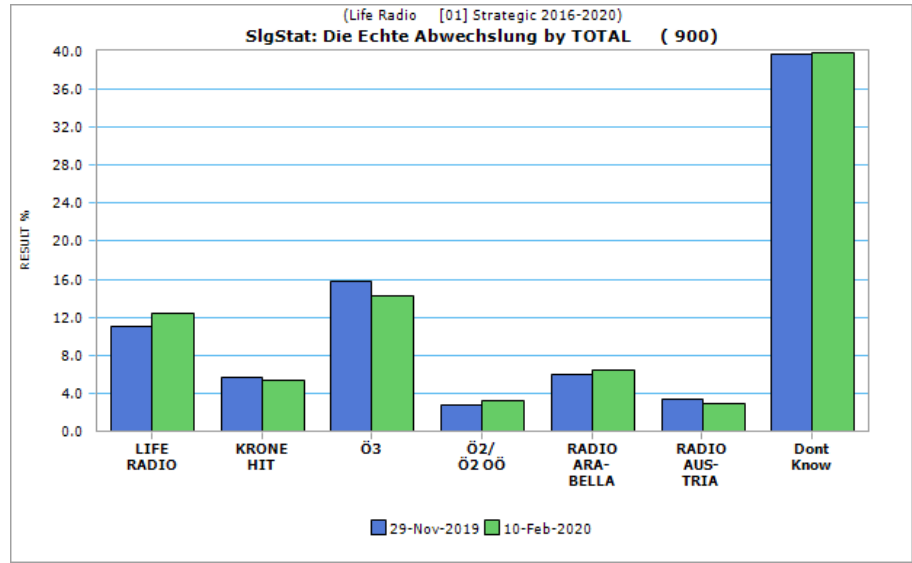
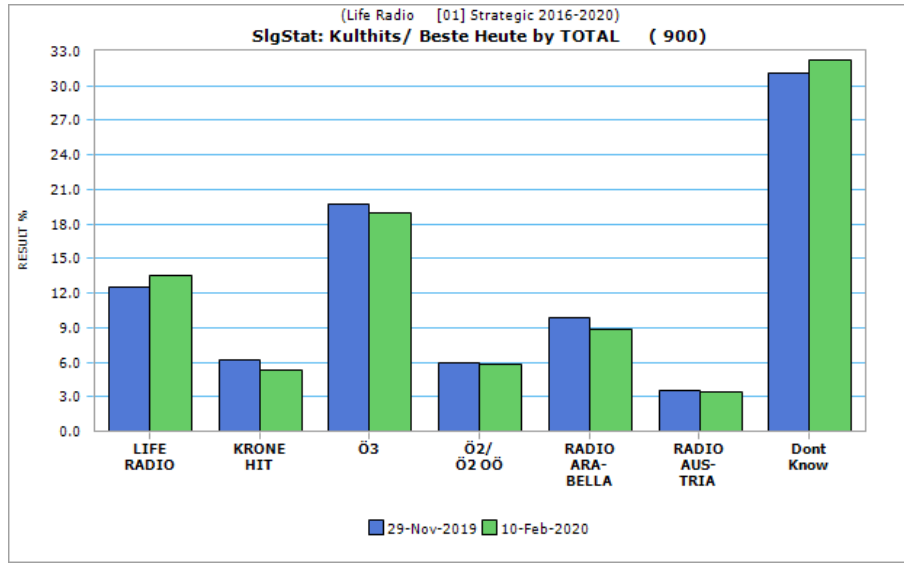
- **Die Meiste Musik**
- **Der Perfekte Musikmix**
- **Kultshits/ Beste Heute**
- **Musik Musik Musik**
- **Die Echte Abwechslung**
- **Hier Spielt Mein Leben**

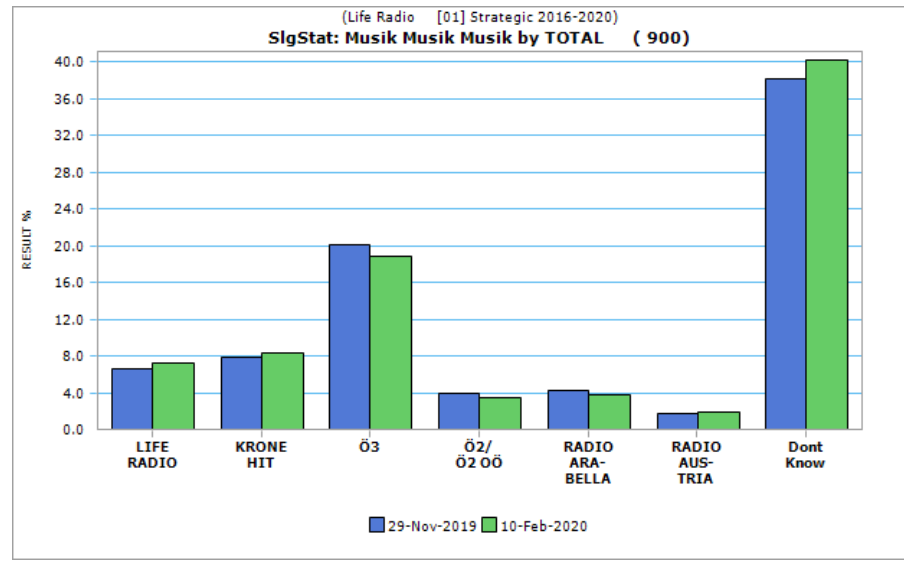
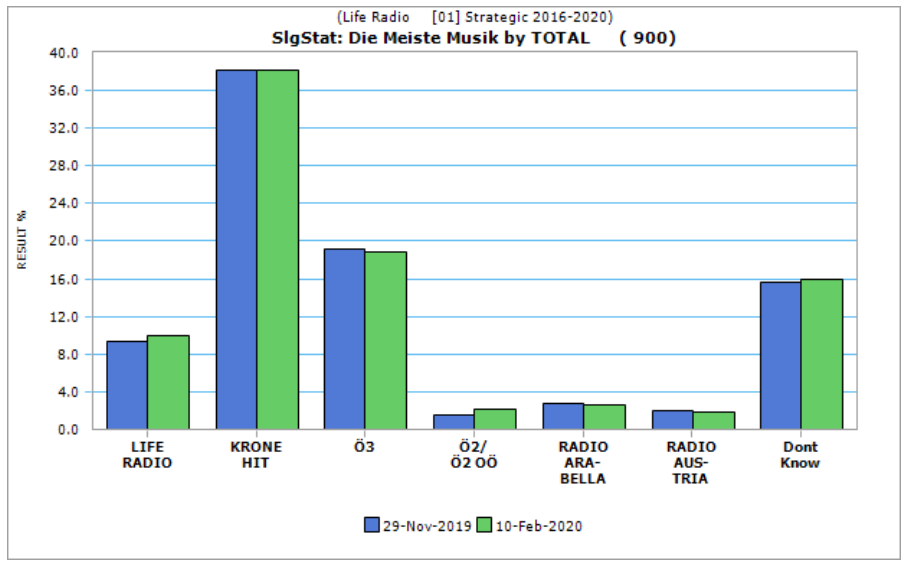
Slogan Station



- Der Perfekte Musikmix
- Hier Spielt Mein Leb'n
- Kulthits/ Beste Heute
- Die Echte Abwechslung
- Die Meiste Musik
- Musik Musik Musik

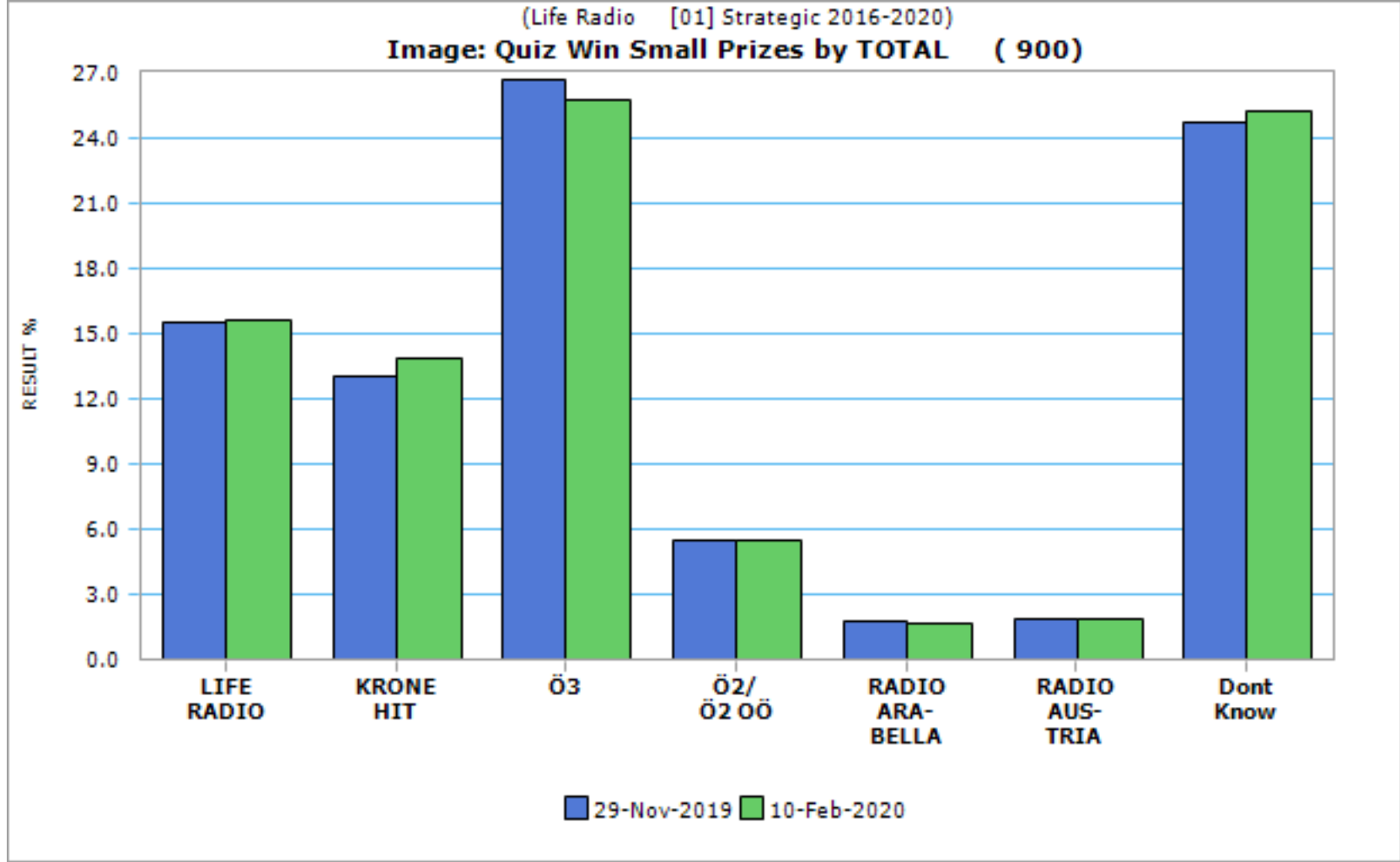


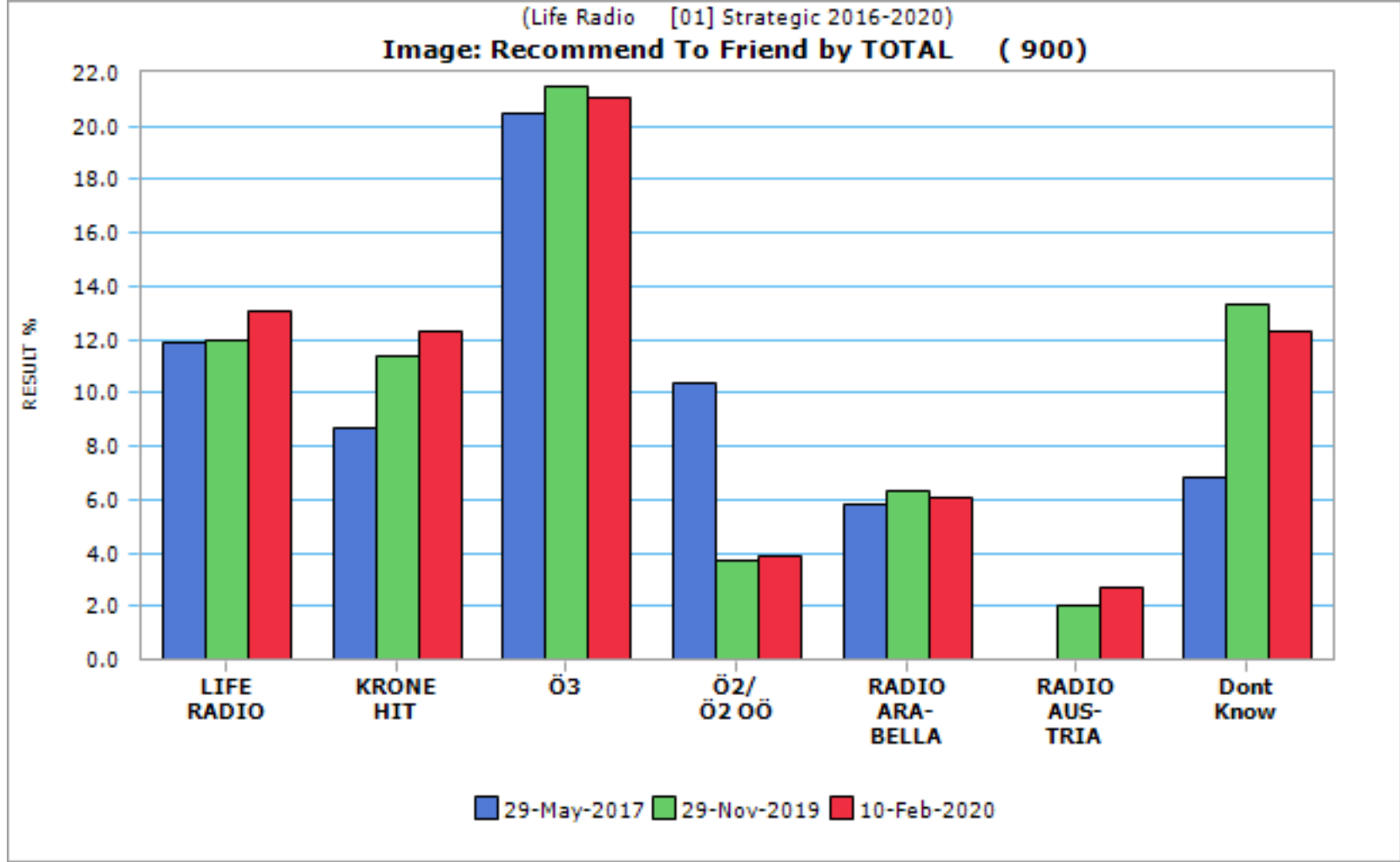




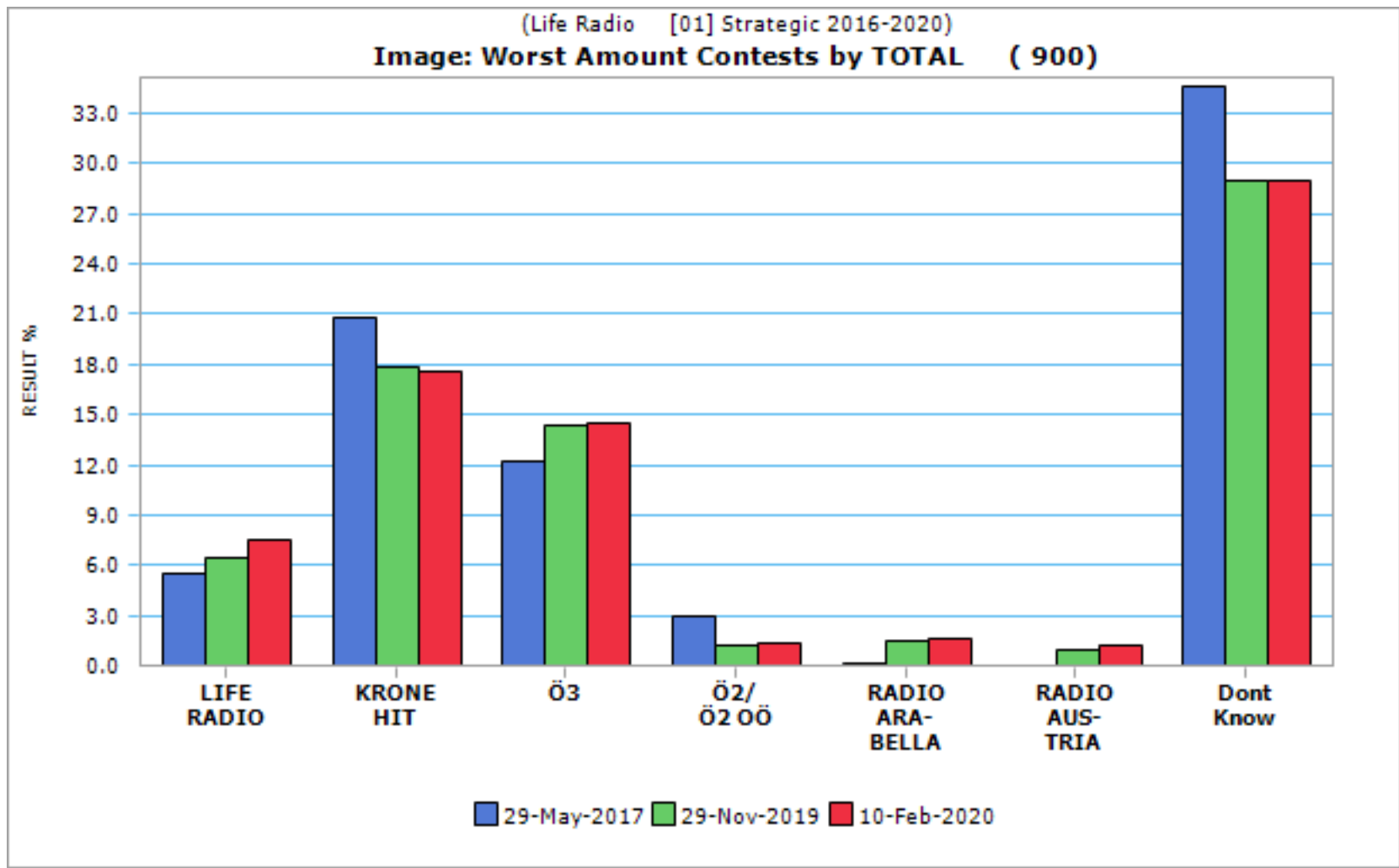


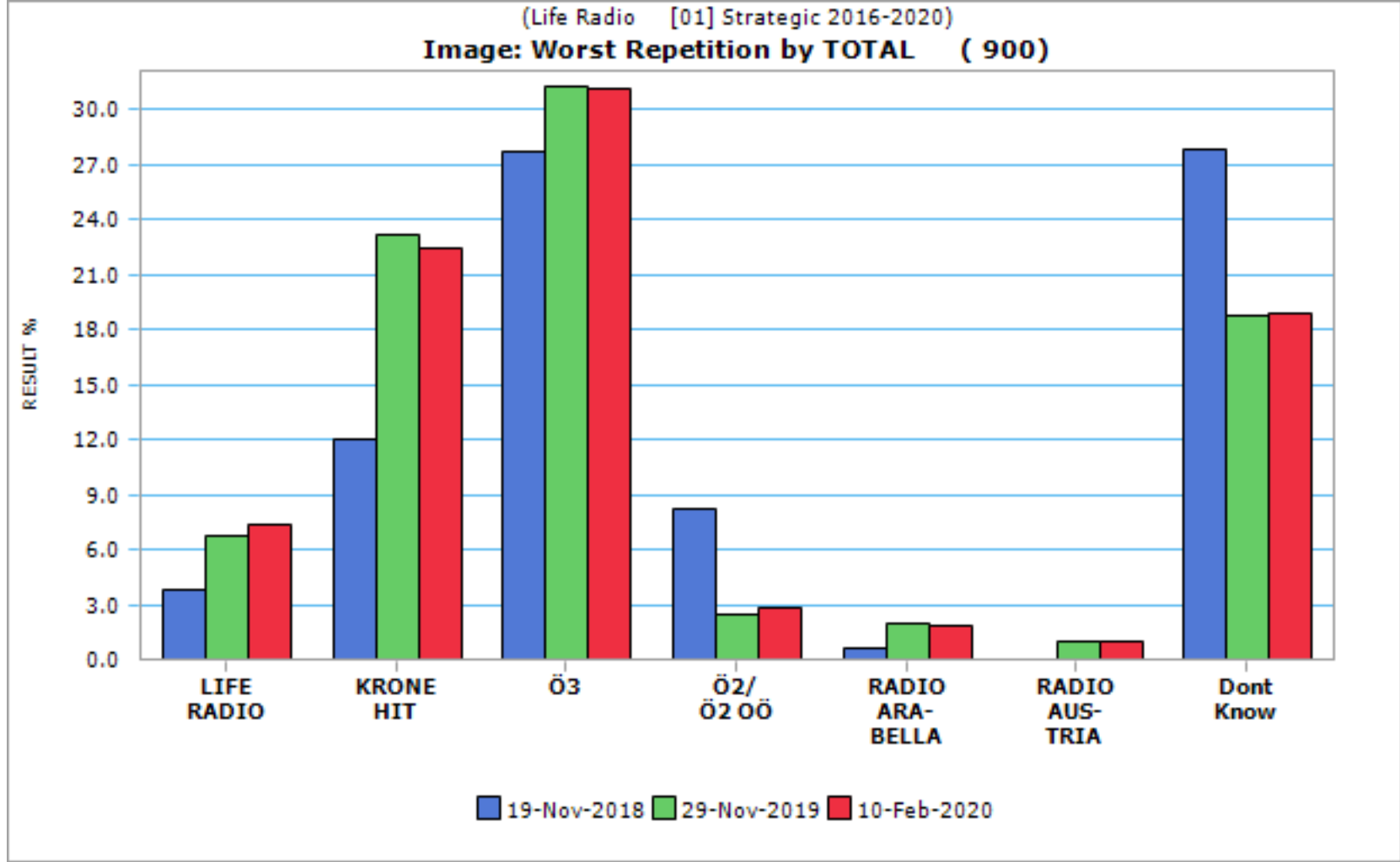
## Other Images

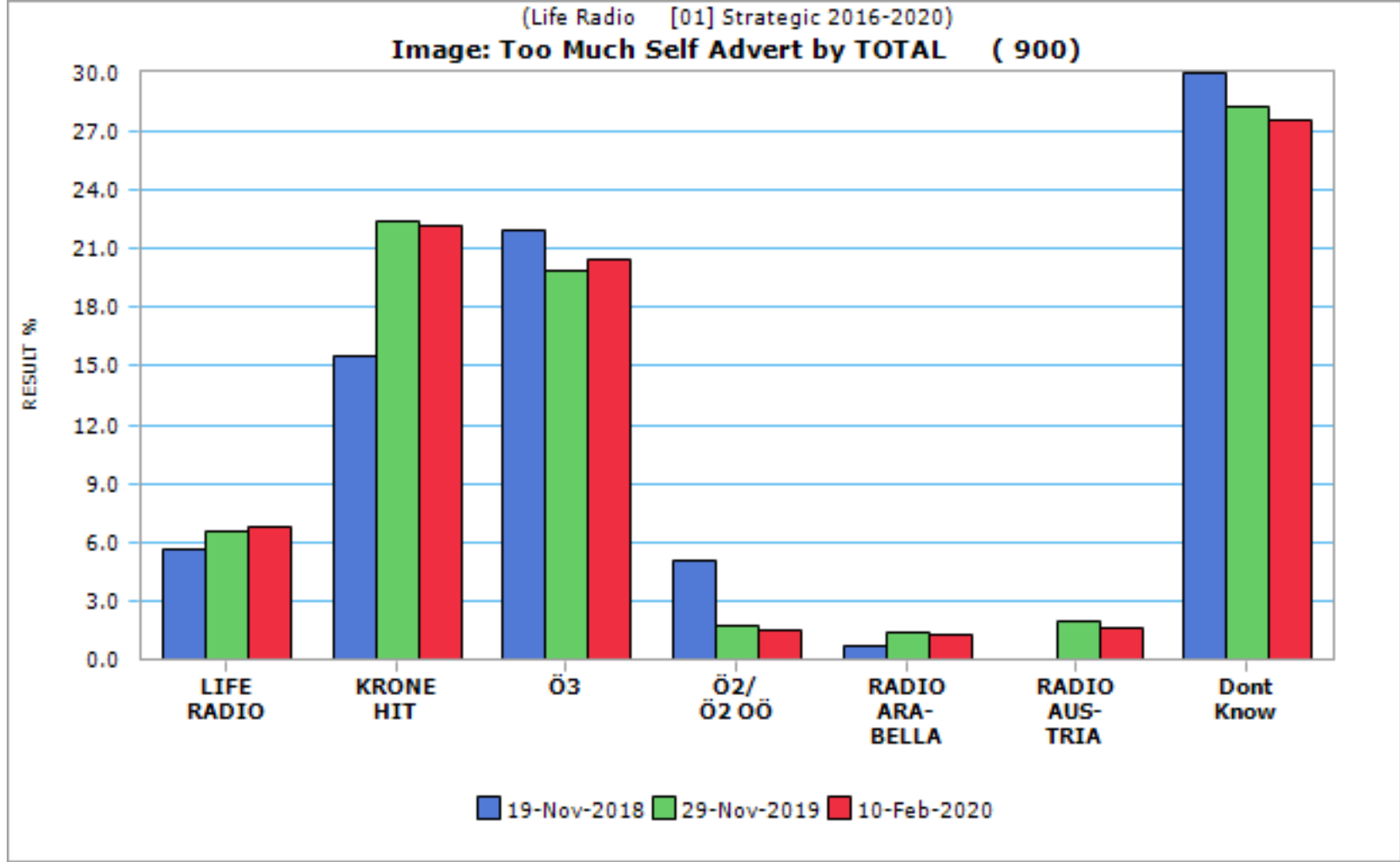












## Morning Show

- The Morning Show remains one of the great strengths of Ö3 and this colours many other results here.
- Not only does the station dominate listening share, the passion for the show among listeners is the highest in the market.
- Building morning show listening (and loyalty) is the biggest opportunity for Life Radio.
- Planned changes in the morning show presentation should be aimed at providing a long-term platform for Life Radio .. the station's main attribute in the morning is 'fun and entertaining' however there is also an opportunity to focus more on local info ...
- Ö3 dominates traffic images.

## The importance of clear music positioning

- The positives noted in the last report are still here
- Life Radio is most associated with 90s and 80s, but has strong association for 2000 and (some) current music - mainly mainstream pop. The sample from the '10s' has good appeal although most current music segments are still dominated by Ö3
- Krone is more clearly positioned as a contemporary music station with pop-dance the style most associated. Krone does not dominate the market, the station appeals mainly to 14-24 age groups but the station has good 25-34 appeal as well- here is where Krone represents a threat to Life Radio
- The association of Life Radio with old/new music mix (and variations of this) is also a good outcome, reinforced by clear association of the 'Perfekte MusicMix' slogan. Note however that Life Radio does not own this outright in the total market.
- Life Radio has a broad base of music association - from current pop to older 90s and 80s especially among 25-44 females. The station does not have particularly clear imaging/associations for males. The current music on the station needs a stronger presence - without removing or reducing the stations clear **mix** associations

# Life Radio Strengths - Weaknesses

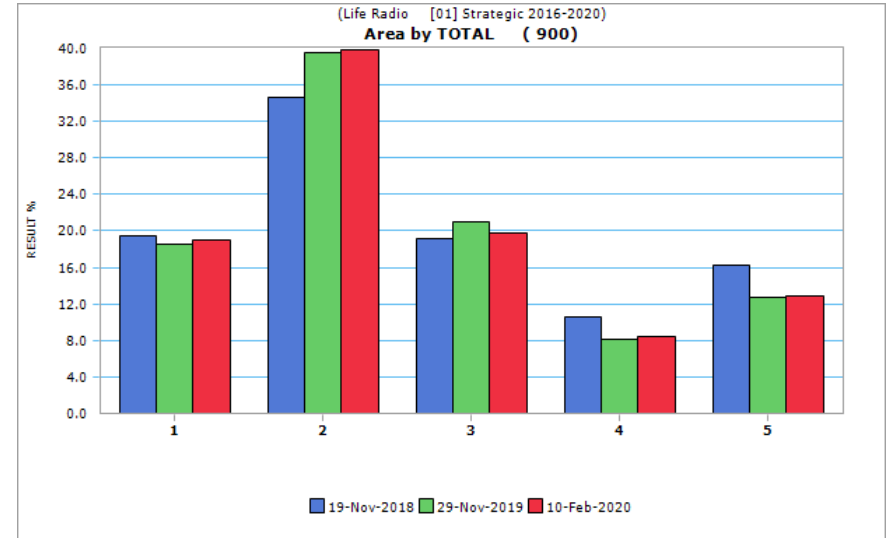
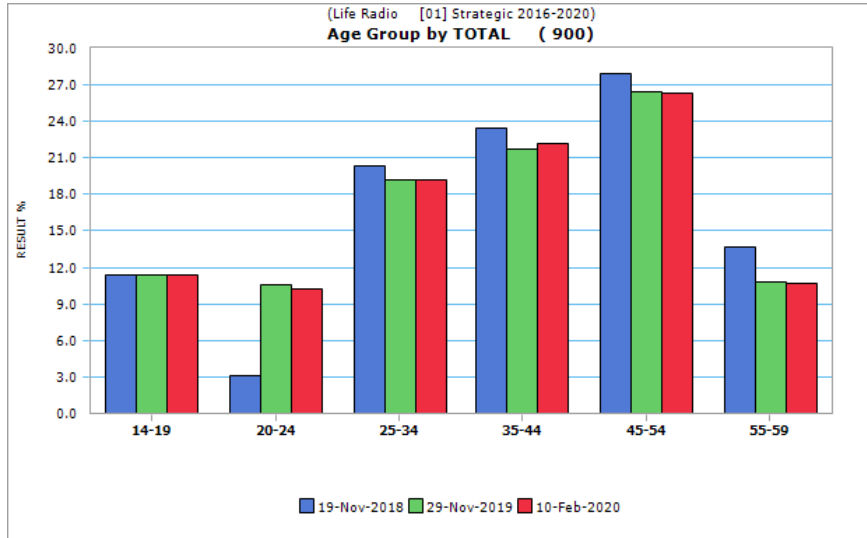


STRENGTHS	WEAKNESSES
<p>local - regional focus</p> <p>Clear association with mix positioning</p> <p>Key images among the station's cume are good</p> <p>Cume growth</p> <p>Share growth</p> <p><b>OPPORTUNITY</b></p> <p>Focus on better-stronger local / regional content.. identify USP</p> <p>Continue to focus the mix and music messages to fragment the broad base of Ö3 and Ö2 (Ö2 'old' Ö3 'repetition?')</p> <p>Focus on key regions especially Linz-Wels</p> <p>better morning show content and stability in the personality &amp; team ..</p>	<p>overshadowed by Ö3 in most contemporary music segments</p> <p>Life Radio Music seen as too old / conservative?</p> <p>Lack of morning show personality or clear positive differentiation</p> <p>Conversion is low</p> <p><b>THREATS</b></p> <p>Ö3 reacts?</p> <p>Ö2 is also a local or regional provider promotional and marketing firepower of ORF</p> <p>Ö2 also has strong oldie music associations that create a problem for Life Radio.. therefore the 'mix' is the critical difference</p>

*Sample & appendix*

# Sample

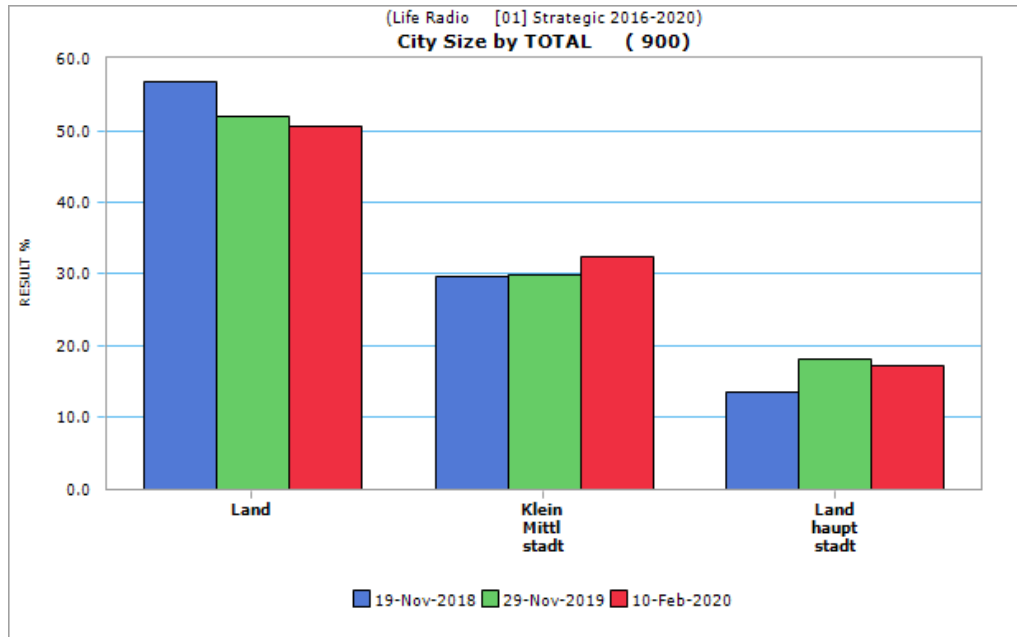
## AGE & AREA



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# AREA



# Sample: Monthly

