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Executive Summary – Online Strategic Perceptual Study
Energy, Vienna

Data Collected:
18 February - 3 March, 2022

Presented (Virtually):
13 April, 2022

Core Problem / Primary Goal

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What is the ideal strategic plan for Energy in Vienna that will enable it to maximize its ratings and grow in market share over the next 12-18 months with its respective target audience?

Given the decline in radio usage with the youngest end of its target, what tactics should Energy employ to regain these listeners?

What is the optimal format opportunity for Energy in 2022 and beyond, considering these trends in radio listening with the 15-19 and 20-24 segments?

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Population and Sample Composition

Population and Sample Composition

- <u>Sample Size</u>: 500 radio listeners between the ages of 15 and 39 who spend at least 30 minutes per average weekday listening to the radio.

- <u>Sample Design</u>: Mirrors the 15 to 39-year-old population of greater Vienna. The sample is designed to reflect the actual distribution of this population by gender and age.

- <u>Fieldwork Methodology / Provider</u>: CAWI (Computer-Assisted **Web-based** Interviewing) / Triconsult (https://www.triconsult.at/)

- <u>Dates of Fieldwork</u>: 18 February - 3 March, 2022. Average duration of online survey: 17 minutes.

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Population and Sample Composition

2022 Vienna Radio OSP [n=500]	Quota %	Actual %	Difference (Actual-Quota)	Number of People (n)
Total Males (15-39)	50.4%	50.4%	0.0%	252
Total Females (15-39)	49.6%	49.6%	0.0%	248
Male 15-19	7.3%	7.4%	0.1%	37
Female 15-19	6.9%	7.0%	0.1%	35
Male 20-24	9.2%	9.0%	-0.2%	45
Female 20-24	9.2%	9.2%	0.0%	46
Male 25-29	11.2%	11.6%	0.4%	58
Female 25-29	11.1%	11.2%	0.1%	56
Male 30-34	11.6%	11.4%	-0.2%	57
Female 30-34	11.4%	11.4%	0.0%	57
Male 35-39	11.1%	11.0%	-0.1%	55
Female 35-39	11.0%	10.8%	-0.2%	54

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Preview of Findings

Formats & Targeting

CHR · ROCK RADIO · nt newstalk · Oldies · Country Radio · Classical Radio · CHR Rhythmic · Urban AC · Salsa · R&B · Classic Hits · Sports Talk Radio · Adult Contemporary · Classic Rock Radio · Alternative Rock · Regional Mexican Radio · Dance Radio · Hot AC

MLT Music & Format P1 – Gender/Age Map

88.6

Older

Ö3 As Is   R Wien

Pure CHR

Kronehit   Hot AC

Ö3

FM4

Younger

Energy

More Female | More Male

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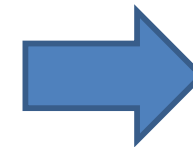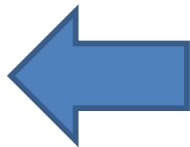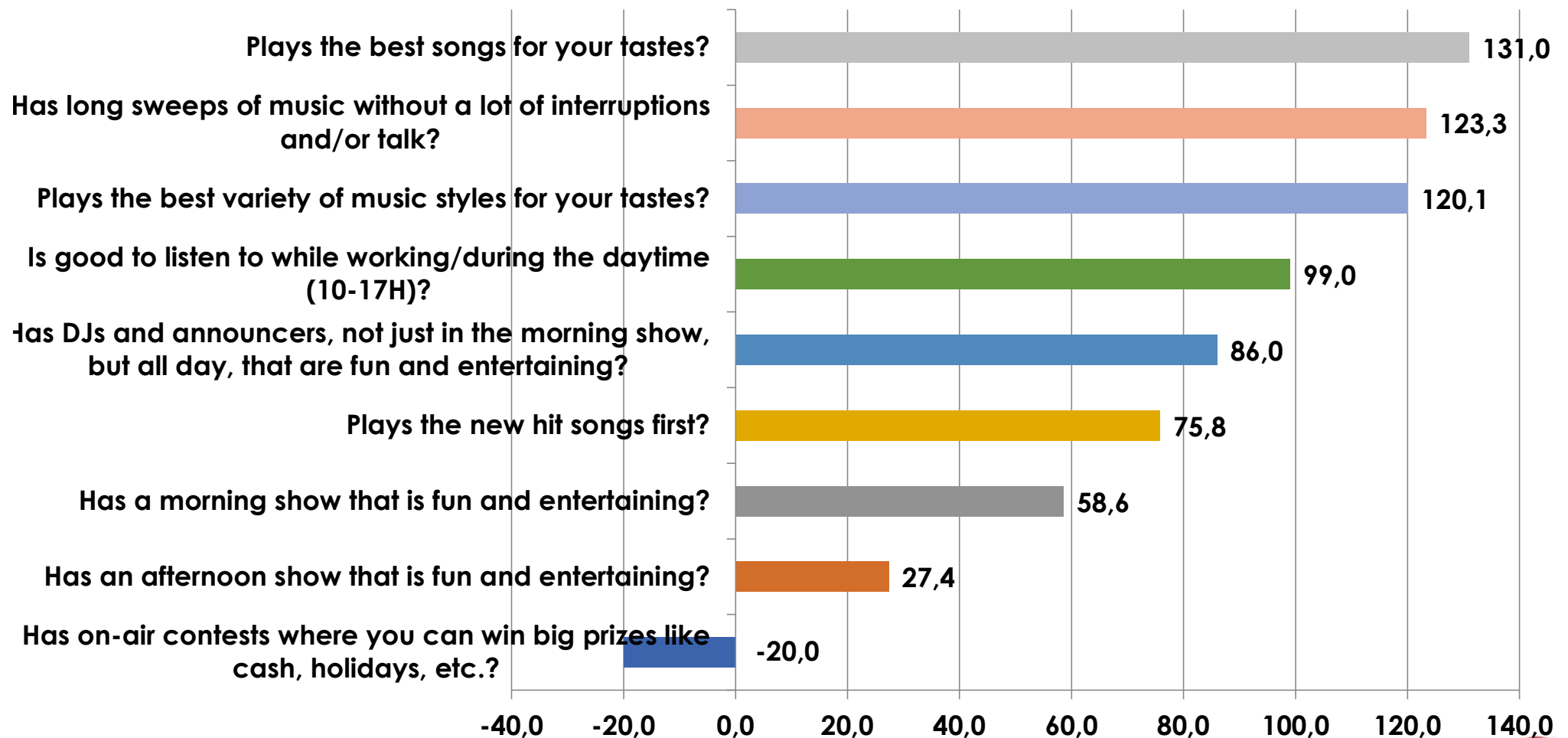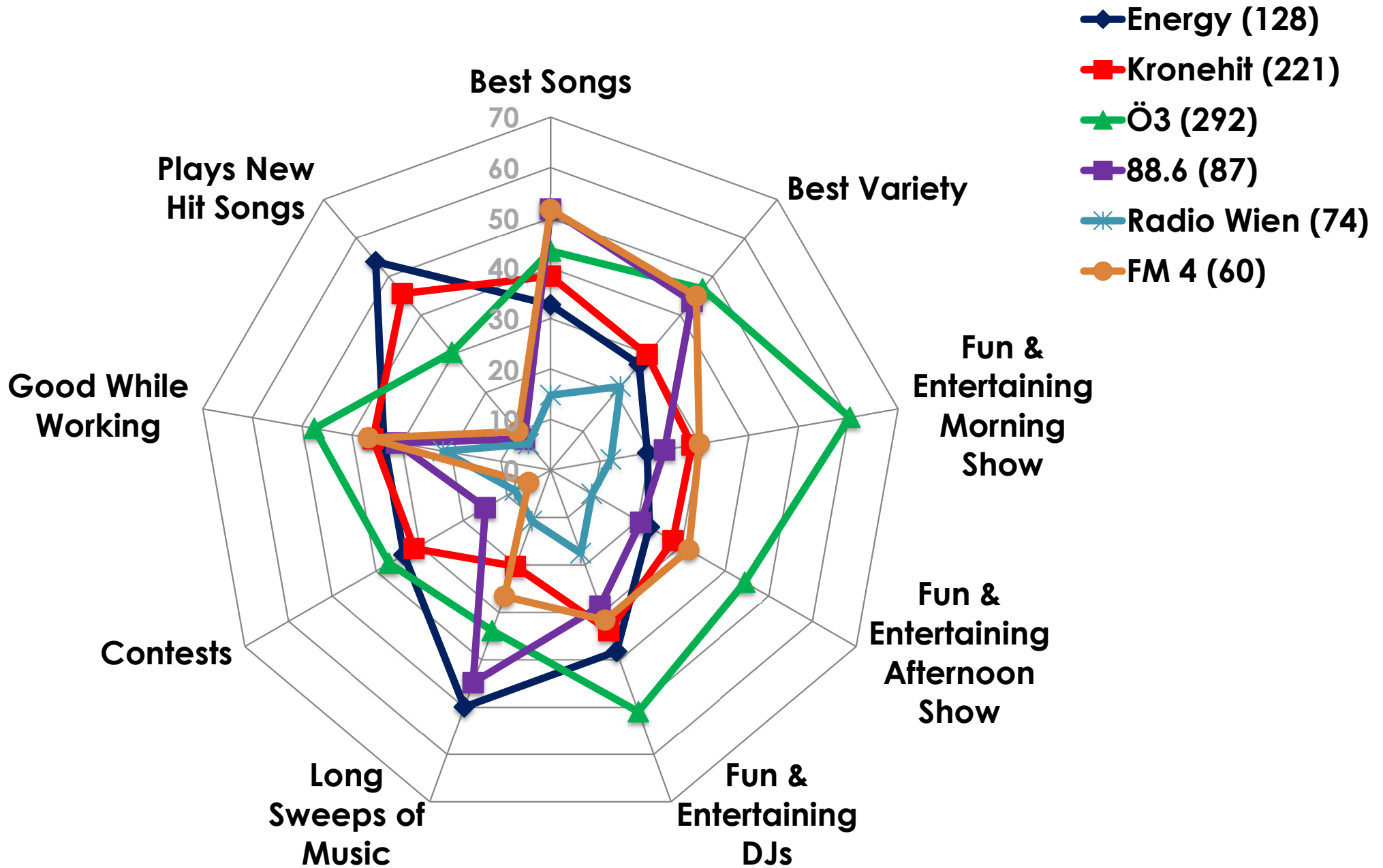
Qualities / Listening Motivators – Importance – Total

Of the nine qualities we tested, "plays the best songs," has long sweeps of non-stop music, and "plays the best variety" fetched the highest "<u>weighted net positive</u>" scores. Contests were not viewed as being very important.

Quality	Value
Plays the best songs for your tastes?	131,0
Has long sweeps of music without a lot of interruptions and/or talk?	123,3
Plays the best variety of music styles for your tastes?	120,1
Is good to listen to while working/during the daytime (10-17H)?	99,0
Has DJs and announcers, not just in the morning show, but all day, that are fun and entertaining?	86,0
Plays the new hit songs first?	75,8
Has a morning show that is fun and entertaining?	58,6
Has an afternoon show that is fun and entertaining?	27,4
Has on-air contests where you can win big prizes like cash, holidays, etc.?	-20,0

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Qualities – Face Off – Aided Weekly Cume

Images

Images – Face Off – Aided Weekly Cume

Legend:
- Energy (128)
- Kronehit (221)
- Ö3 (292)
- 88.6 (87)
- Radio Wien (74)
- FM 4 (60)

Axes:
- Is getting better
- Is getting worse
- Plays too many commercials
- Uses Slogan: "Hit Music Only"
- Plays a lot of bad songs
- Has too much talk
- You & your friends listen to most
- Is for people younger than you
- Repeats the same songs
- Has too many contests
- Has best social media content
- Not afraid to push limits

Some of the data points on this graph may contain statistically insignificant figures. Please exercise caution with small samples.
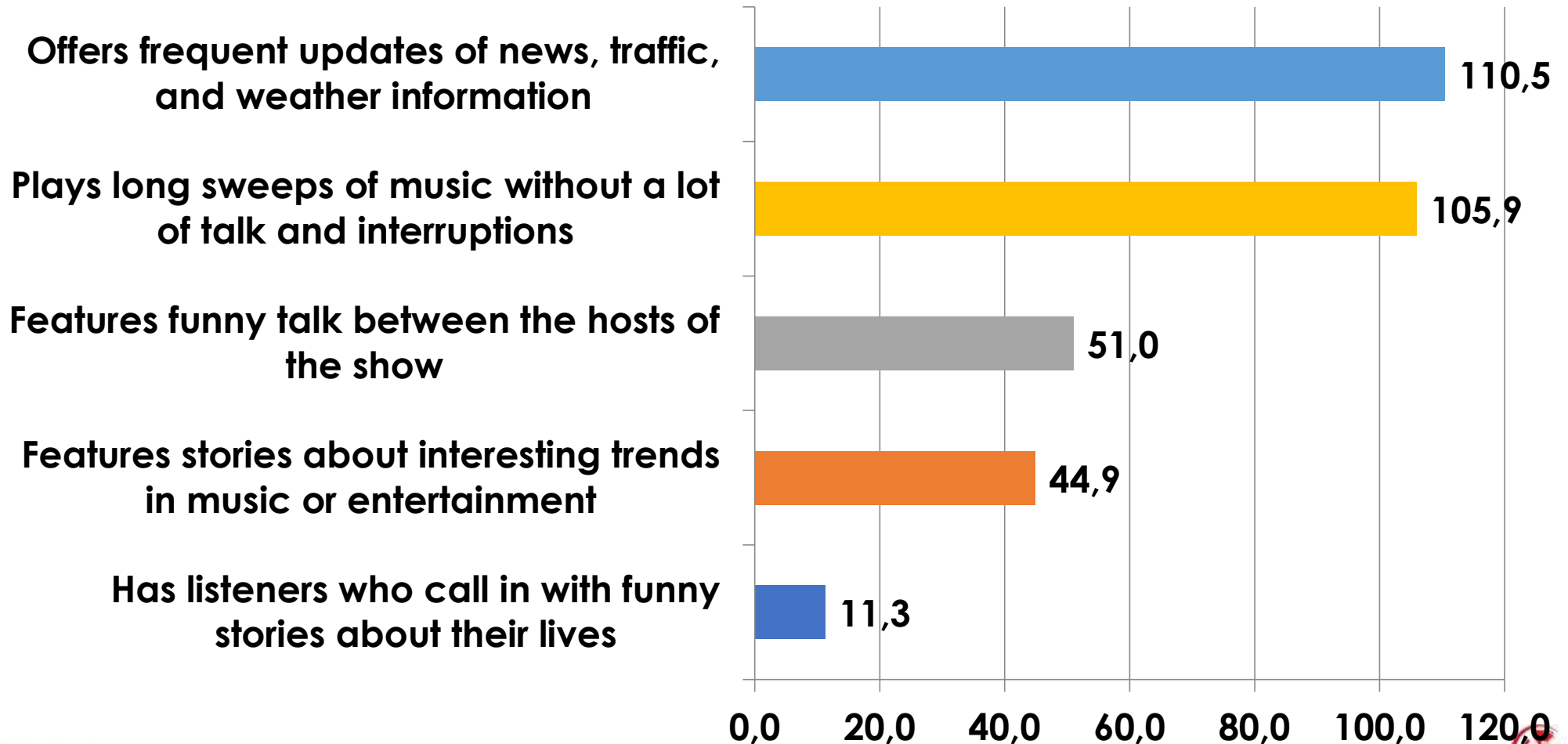
Morning Show Elements – Importance – Total

Of the five morning show qualities, or elements, we tested, "Offers frequent updates of news, traffic, and weather information" earned the highest "weighted net positive" score.

Element	Score
Offers frequent updates of news, traffic, and weather information	110,5
Plays long sweeps of music without a lot of talk and interruptions	105,9
Features funny talk between the hosts of the show	51,0
Features stories about interesting trends in music or entertainment	44,9
Has listeners who call in with funny stories about their lives	11,3

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Music Styles

Music Styles (1-5)

1	HARDER DANCE (CURRENT/RECURRENT)	
	acraze	do it to it
	farruko	pepas
	armin van burren	bla bla bla
2	BLACK/RNB (CURRENT/RECURRENT)	
	24kgoldn	mood
	lil nas x	old town road
	jason derulo	savage love
3	POP ROCK (CURRENT/RECURRENT)	
	olivia rodigo	good 4 u
	onerepublic	run
	imagine dragons	follow you
4	POP (CURRENT/RECURRENT)	
	ed sheeran	bad habits
	coldplay	higher power
	weeknd	blinding lights
5	POP DANCE (CURRENT/RECURRENT)	
	topic atb	your love
	leony	faded love
	vize	never let me down

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Music Styles (6-10)

6	**GERMAN STYLE (CURRENT/RECURRENT)**	
	mark forstrer	übermorgen
	mathea	2x
	sido	bilder im kopf
7	**POP ROCK (GOLD)**	
	onerepublic	counting stars
	mando diao	dance with somebody
	walk the moon	shut up and dance
8	**POP (GOLD)**	
	katy perry	i kissed a girl
	pink	just give me a reason
	maroon 5	girls like you
9	**POP DANCE (GOLD)**	
	guetta	titanium
	avicii	wake me up
	kygo	higher love
10	**BLACK/RNB (GOLD)**	
	eminem	lose myself
	pussy cat dolls	don't cha
	beyonce	crazy in love

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Music Styles Segmentation Analysis

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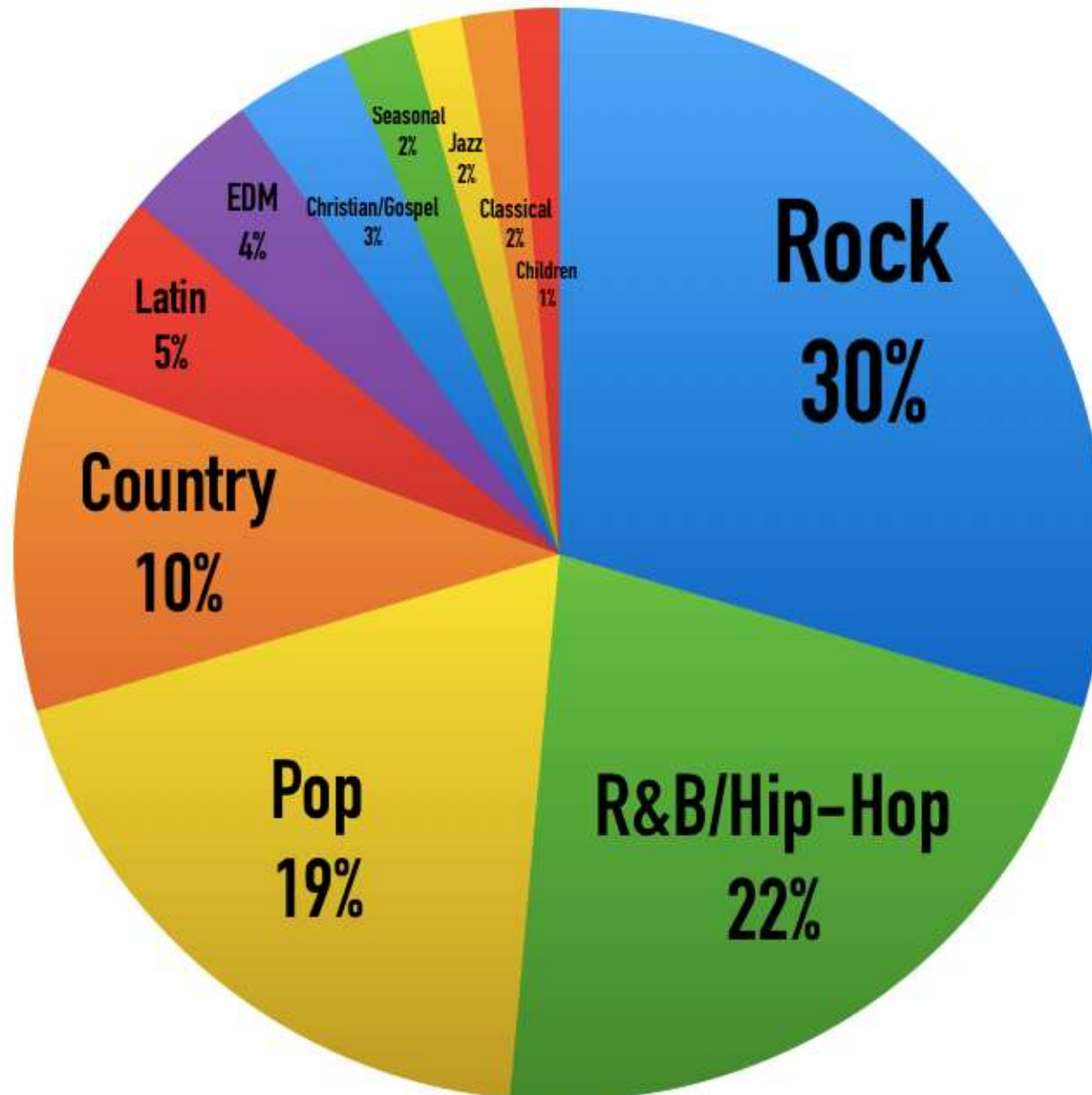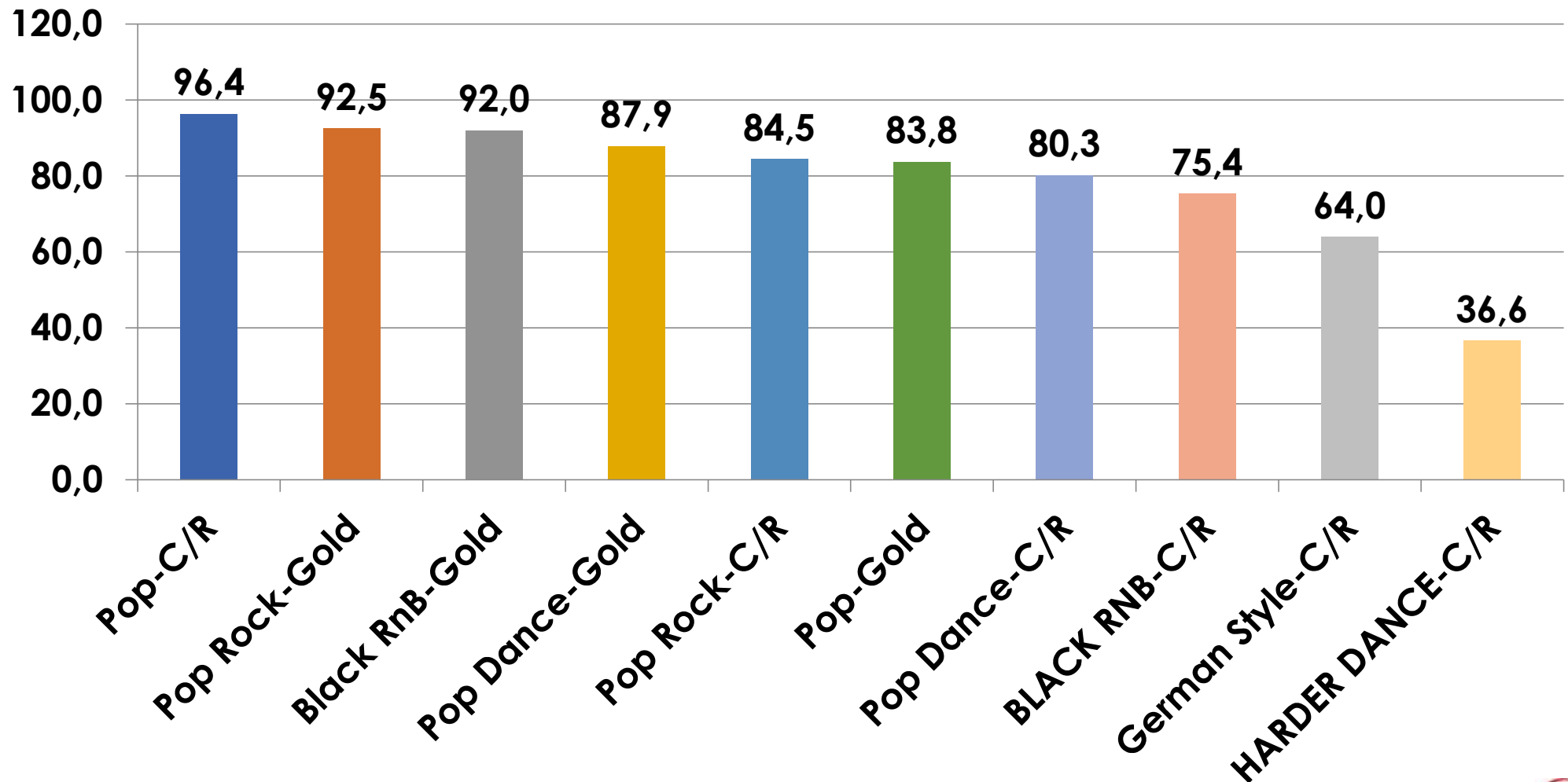
Music Styles Segmentation Analysis **(Total)**

Current/Recurrent Pop (Ed Sheeran, Coldplay & The Weeknd) earned the highest weighted net positive score ("WNP"). Of the ten music styles analyzed in this study, Current/Recurrent Harder Dance tested the worst.
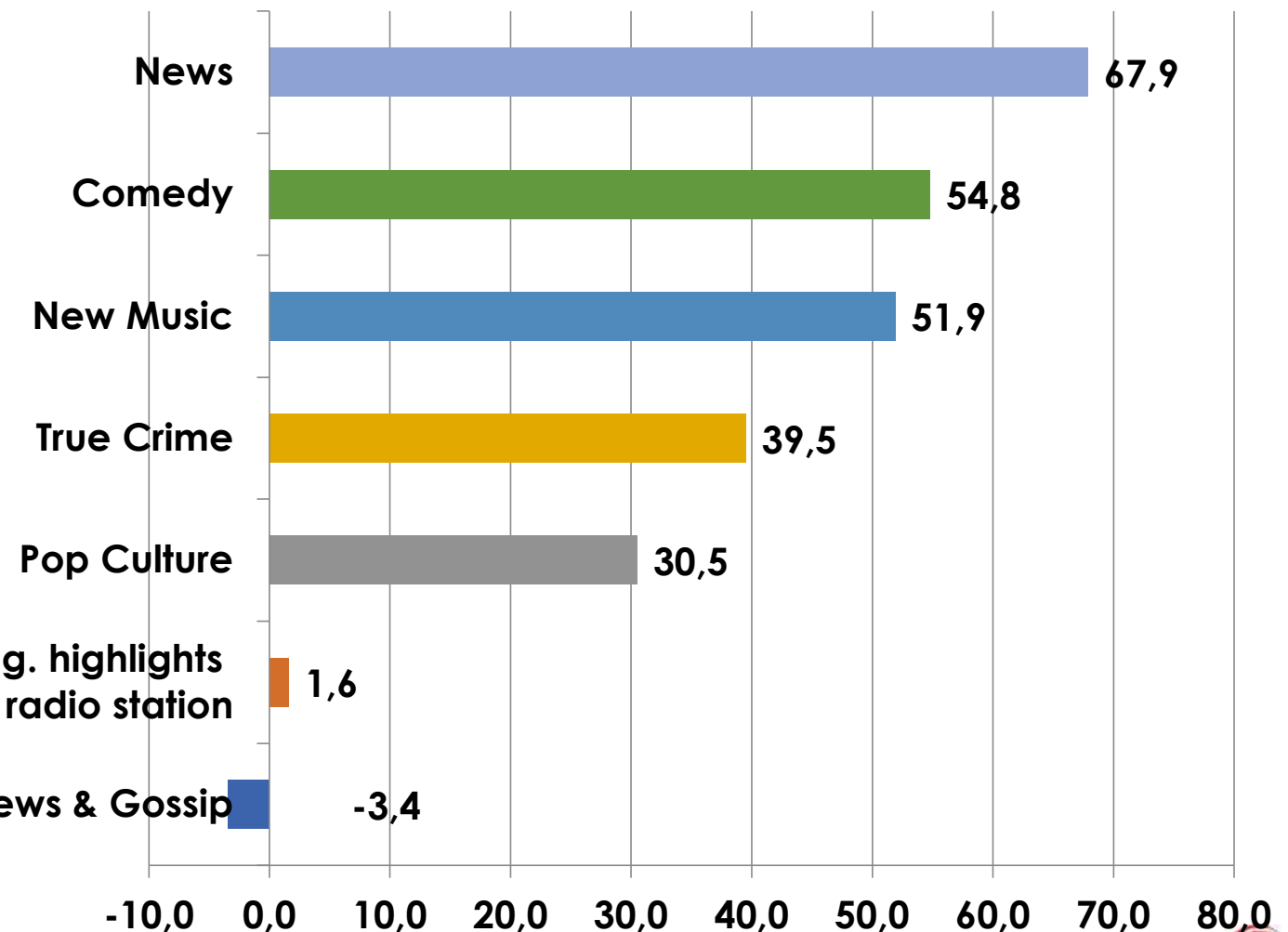
Specialty Programming & Podcasts

Types of Podcasts – Appeal – Total

Of the seven types of podcasts we tested, ones that were based in news or current events had the highest "<u>weighted net positive</u>" score.

Type	Score
News	67,9
Comedy	54,8
New Music	51,9
True Crime	39,5
Pop Culture	30,5
Rebroadcast of a radio show, e.g. highlights from today's morning show on a radio station	1,6
Celebrity News & Gossip	-3,4

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Strategic Plan

2022 Strategic Plan – Energy

Ideal Target for Future Tactical Research (Music Research)

- Gender: 55-60% Female / 40-45% Male

- Ages: 20-35 (50% 20-27, 50% 28-35)

- Music partisanship distribution: 30% Energy P1, 40% Ö3 P1, 30% Kronehit P1

- Listening requirement: No listening requirement to Energy

- Music montage requirement: 100% must rate audio format montage an 8, 9 or 10 on a 1-10 scale. Montage ideally to include songs from the following music styles:

  - 1 Song: Pop Current/Recurrent
  - 1 Song: Pop Dance Gold
  - 1 Song: Black RnB Current/Recurrent
  - 1 Song: Pop Dance Current/Recurrent
  - 1 Song: Pop Current/Recurrent

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Glossary

- **Daily/Weekly Cume ("WC") or "Reach"**: People who name a station as one they have listened to in the past day/7 days (Unaided). Think of these people as existing listeners.

- **Station P1 or MLT**: People who name a station as the one they "Most Listen To" when they have the choice.

- **Format P1**: People who name a particular format as one they would listen to "often" and one that could be a "first favorite." Think of these people as potential listeners.

- **Conversion**: The percentage of a station's daily/weekly cume (unaided) that also name that station as the station they listen to most. Think of conversion as synonymous with listener satisfaction.

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Morning, Music & Overall Conversion in Detail

Mornings Conversion	Music Conversion	Overall Conversion
# of people who said Station X is their favorite in mornings: 100	# of people who said Station X is their favorite for music: 150	# of people who said Station X is their favorite overall: 125
# of people who said they listen to Station X in an average week (aided): 400	# of people who said they listen to Station X in an average week (aided): 400	# of people who said they listen to Station X in an average week (aided): 400
Conversion Rate (Mornings): 25% (100/400)	Conversion Rate (Music): 37.5% (150/400)	Conversion Rate (Overall): 31% (125/400)

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