



Strategic – Music survey

November 2018

Cume Improves but overall share is lower

The station's age group 'centre' moves a little older with increases in 35-44 shares and lower 25-34 share.

Conversion falls; lower P1 'conversion' means lower tsl therefore lower share.

Life Radio's share losses mean gains by Ö2 and also Ö1 with both stations improving 25-44 share.

Reasons for these changes include;

1. Substantial shifts in contemporary music appeal with lower passion for most contemporary music segments, as a result the most appealing music types for adult listeners are 80s, 90s and 2000s. Changes in these results are most apparent among female (pop) listeners. Male music interests are more consistent with past results.
2. Morning Show preferences and motivations move from 'entertainment' to information. Favours Ö2 and Ö1.
3. Life Radio remains relatively weak in cume and share (compared to Ö3 and Ö2) both ORF stations have much higher P1 conversion/retention

Ö3

Both cume and share are lower for Ö3. Share losses are greater among females than males. In part these are likely to be the result of the factors included on the previous page.

There are a number of indicators here that show a much weaker position for Ö3 however the station still occupies a dominant position in the market. Losses among female (pop) listeners are partly offset by good male listening.

Ö3 loses share in the Morning Show, this is greater among 25-44 females - losses for Ö3 are gained mainly by Ö2

Ö2

In these results, this station is the major 'change - agent' with better cume and share. Ö2 gains audience share in younger age groups with better 25-34 shares (as Life Radio and Ö3 fall).

Gains for Ö2 look slightly unusual given the station audience/age profile, However Ö2 is clearly seen as a station associated most with information (Morning Show) and 80s and 90s oldies.



Key Results: other stations

Krone Hit

There is little positive news for Krone Hit in these results. In contrast to Radiotest indicators the station loses both cume and share, with most of its remaining audience in younger age groups,

Krone Hit is not a significant choice among adult listeners.

Music segments tested here are not a clear indicator of changes for Krone Hit as R&B/Urban music segments were not included. Despite this Krone Hit listener preferences cluster mainly around contemporary music segments.

Radio Arabella

Radio Arabella has had a better result with improving cume, however share remains flat overall. As noted in previous results Arabella is defined by its oldies associations. In the current music phase this potentially proved them with an opportunity for further growth.