BROADCAST PROGRAMMING & RESEARCH

Music - Strategic

May 2024

Summary:

Survey detail:

Background and content.

The sample for this 2024 study is 1000 people aged **14-59** weighted and balanced by age, gender and area. All surveys conducted on-line. 14-16 year olds are not used without parental permission so numbers are small.

Note that the **TOTAL** results are not compared to the results of the 2023 survey as this was based on the **25-49** age group

Survey content:

- **Listening:** Main station listening + other stations listened
- **Dayparts** listened and share
- **Montages:** eleven montages that are part of the 'AC' environment - Station associations
- **Format** 'samples': Updated impressions - hot AC and current Hits with some older music
- **Importance:** and associated images
- **Programme** / age indicators
- **Open ended comments** particularly about Life Radio

Market: The most significant change in these results is the addition of 886 in the results. Unlike some of the other 'new' stations added in the past years, 886 has a more obvious presence attracting male listening.

Morning Show: Has the change in presenter for the Life Radio Morning Show had an impact on listening or satisfaction?

Summary:

Market Overview:
Cume (WHK) is lower for most stations - this is likely to be due to the timing of the research fieldwork. 886 attracts 11% cume listening

Life Radio - Key indicators

- **CUME:** while overall cume is lower than the last direct comparison (2022) the station attracts a wide audience that is well balanced by age group 14-54
- **Conversion:** improves (again) with P1 reaching 40% for the first time - greater cume means better tsl
- **Share:** Life Radio attracts a greater share among 35-54 listeners. Overall share is distorted by the addition of Radio 886 (5.5%) Life Radio share is at 2022 levels. Krone Hit and Ö3 are lower than past averages.
- **Morning Show:** Share is slightly lower than 2022 but still in an upward trend generally. Krone Hit is flat, Ö3 continues to trend lower. (Radio 886 attracts 5% share)
- **Music:** Montages and ‘format’ associations show similar grouping to the 2023 survey

Other stations

Ö3:

Ö3 still dominates the market but the (slow) decline in many of the key results continues here. The station attracts the most listening - both in numbers and in share. O3 share dips after age 35 but is consistently strong up to that age.
Morning. Show listening share also shows some indications of wear with a clear pattern of decline since 2021

Ö2

Cume (WHK) is lower here - as it is for most stations. Overall and Morning Show share is also lower. The Ö2 audience grows in older age groups

Krone Hit

The number for Krone Hit are a little lower overall (compared to 2022). Morning Show Share is steady. Most importantly Krone Hit is pushed back to a younger age profile as Life Radio strengthens in the 25-54 age group.

Radio Arabella;

The station's age-profile is still older and overall numbers are low. Interestingly, Arabella does attract more numbers in the 35-44 age group than in older and younger groups.

Radio Austria:

No real changes

886

There are no trends here - but the the age group most attracted are **35-44** (predominantly males)