

Searching for the Optimal Radio Diary Concept

EXPERIENCES FROM CANADA AND FINLAND

LENA BRUN, MANAGING DIRECTOR, FINNPANEL

RICARDO GOMEZ-INSAUSTI, VP RESEARCH & RCC, NUMERIS

Diaries are often used to measure radio listening

Affordable (provides both local and national figures)

Easy to complete

Less forgetfulness compared to recall (but might facilitate overreporting)

Listening entries completed by the same respondent over time (direct Reach & Frequency calculations)

Inclusive (measures total radio, not only tagged or encoded content)

Utilized in Australia, Belgium, Canada (local markets), Finland, the Netherlands, Russia, Poland, South Africa, UK and US (local markets)

Challenges in changing environment...

Diaries and digital respondents?

Old fashioned image?

Many markets have introduced online diaries to cope with changing consumer behaviour

- Is there an impact on the quality of the measurement - and reported listening figures?

Introducing online diaries - hypotheses

1. There is no difference between those who choose to fill in the diary online compared to those who choose the paper version
2. There is no difference in filling in an online versus paper diary
3. Online and paper diaries are methodologically the same, producing the same level of listening

Impact on sample?

Hypo1: "There is no difference between those who choose to fill in the diary online compared to those who choose the paper version"

- Sample composition
- Return rates

Finland: Impact on sample composition

1. Online option preferred by demos "men", "age 15-34", "higher education" and "capital area"
2. Return rates clearly improve for "age 15-24" (+50 %) and "25-34" (+20 %)

Finland: Return rates

2016	Paper respondents	Online respondents
Men	52%	55%
Women	62%	59%
15-24	31%	48%
25-34	48%	59%
35-54	62%	63%
55+	77%	70%

* Return rate is calculated of those recruited by phone

Canada: Impact on sample composition

1. Adoption of online option averages ~33% of households recruited, being high in more urbanized places
2. Online option preferred by
 - "age 12-24" (~1.5 times more than paper), and "age 25-49" (~2.0 times)
 - "full-timers" (~1.3 times)
 - "university education" (~1.3 times)
 - "household income +\$100,000" (~1.5-1.7 times)
3. Return rates for online respondents average ~40% (all household members), and improve for "age 12-24" (+50%) and "25-49" (+70%)

Canada: Return rates

Fall 2016*	Paper respondents	Online respondents
Men	32%	34%
Women	35%	37%
18-24	23%	26%
25-34	25%	34%
35-54	29%	36%
55+	38%	41%

*Calculations based on recruited respondents (all household members recruited -household *flooding* method).

UK comparable information

1. Placement of online diaries at 54%
2. Completed diaries: 52% online, and 48% paper
3. Online option preferred by
 - full-timers
 - higher education
 - social grades A, B and C1
4. Return rates tend to be ~5% lower regardless of age
5. Online respondents in the sample are almost twice for M15-54 and between 25%-80% higher for F15-54

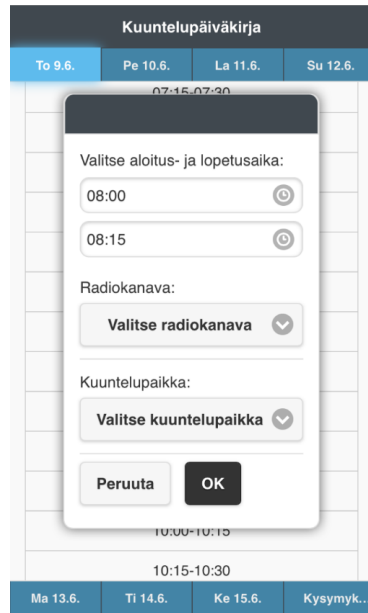
Differences in completion?

Hypo2: "There is no difference in filling in an online versus paper diary"

- Listening statements and stations/platforms marked
- Logins per respondent
- The impact of different layouts is not discussed in this paper

Online diary layout ...

Finland:





Kuuntelupäiväkirja

To 9.6. Pe 10.6. La 11.6. Su 12.6.


07:15-07:30

Valitse aloitus- ja lopetusaika:


08:00 

08:15 

Radiokanava:

Valitse radiokanava 

Kuuntelupaikka:

Valitse kuuntelupaikka 

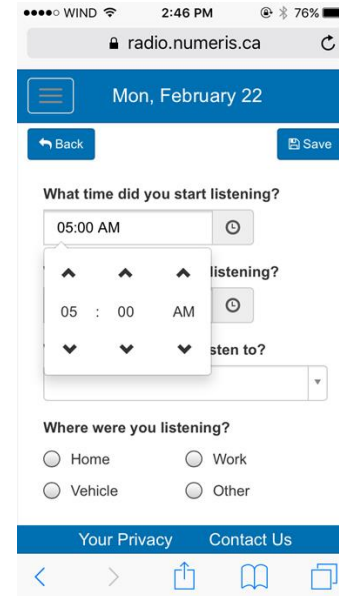
Peruuta OK

10:00-10:15

10:15-10:30

Ma 13.6. Ti 14.6. Ke 15.6. Kysymyk...

Canada:




WIND 2:46 PM 76%

radio.numeris.ca


Mon, February 22

Back Save

What time did you start listening?

05:00 AM 

listening?

05 : 00 AM 




sten to?

Where were you listening?

☐ Home ☐ Work

☐ Vehicle ☐ Other

Your Privacy Contact Us

< >   

Finland: 6 weekly logins per respondent

1. 20% fewer listening sessions in online diary, regardless of age
2. BUT average listening session for "age 15-34" is 10% longer in online diary
3. Number of stations listened to within a week is 15% down among those that filled in the online diary (age 15-54)
4. BUT when we add "other audio" the numbers become similar ...

Finland: Radio stations listened to weekly

2016	Paper respondents	Online respondents
15-24	2.7	2.3
25-34	2.8	2.4
35-54	3.1	2.7

Finland: All stations* listened to weekly

2016	Paper respondents	Online respondents
15-24	3.6	3.4
25-34	3.6	3.4
35-54	3.6	3.5

*Radio + "other audio" (i.e. CDs and LP's, mp3 music, on-demand listening on radio websites and podcasting, music services like Spotify, Youtube, etc)

Canada: 5 weekly logins per respondent

1. Around 25% fewer listening sessions in online diary overall
2. Average listening session is ~8% longer in online diary overall
3. Number of stations listened to within a week is very similar for online and paper respondents, without distinguishing between radio and other audio*

*Current diary designed to collect limited types of “other audio” listening

Canada: All stations listened to weekly

Fall 2016*	Paper respondents	Online respondents
18-24	2.3	2.1
25-34	2.4	2.3
35-54	2.3	2.4
55+	2.0	2.0

*Radio + "other audio" (i.e., subscription services, cable and Internet)

Impact on listening figures?

Hypo3: "Online and paper diaries are methodologically the same, producing the same level of listening"

- Comparing reach and listening minutes for online versus paper diary keepers

Finland: Impact on listening

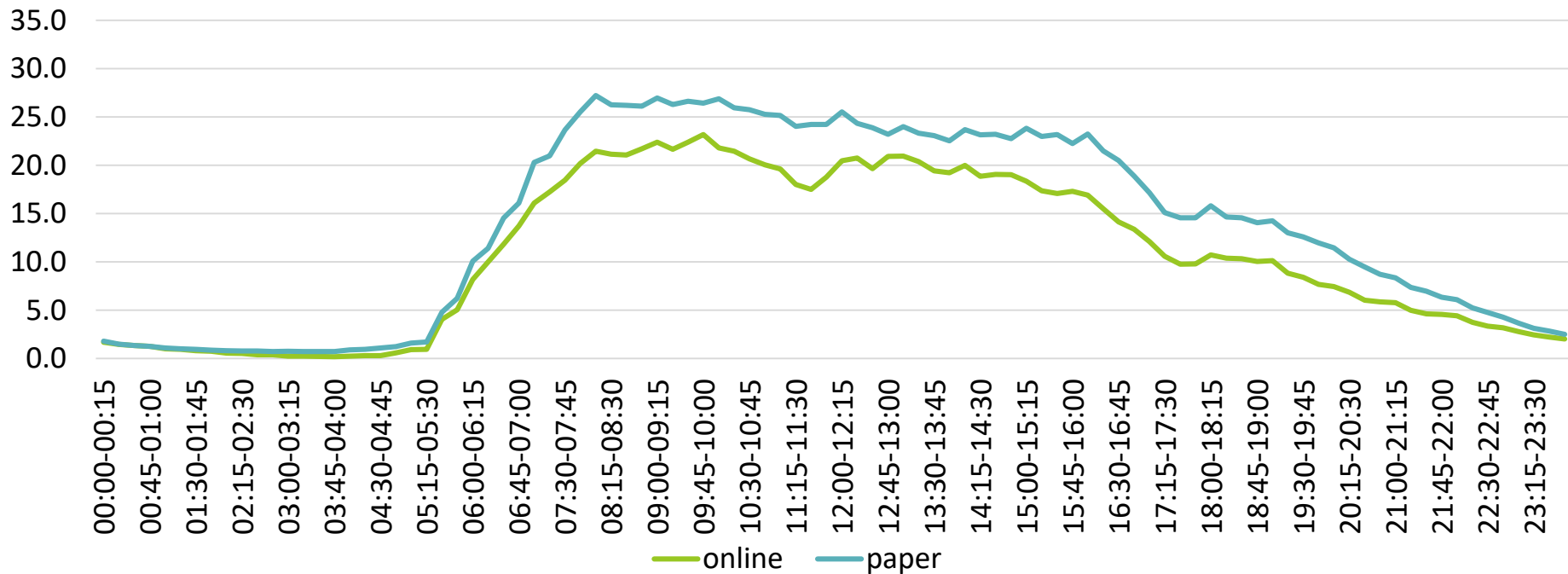
Comparing reach and listening minutes for radio:

- Similar weekly reach for both online and paper diarists
- BUT 20 % less listening for online diaries, regardless of age

Comparing reach and listening minutes for "other audio":

- 10-20 % higher weekly reach and listening minutes for online diaries, regardless of age

Finland: Listening by average quarter hours on weekdays (Mon-Fri) 2016



Finland: "Other audio" makes a difference

2016	Share of "other audio" of total listening	
	Paper	Online
15-24	36 %	46 %
25-34	26 %	31 %
35-54	8 %	12 %
55-64	2 %	4 %

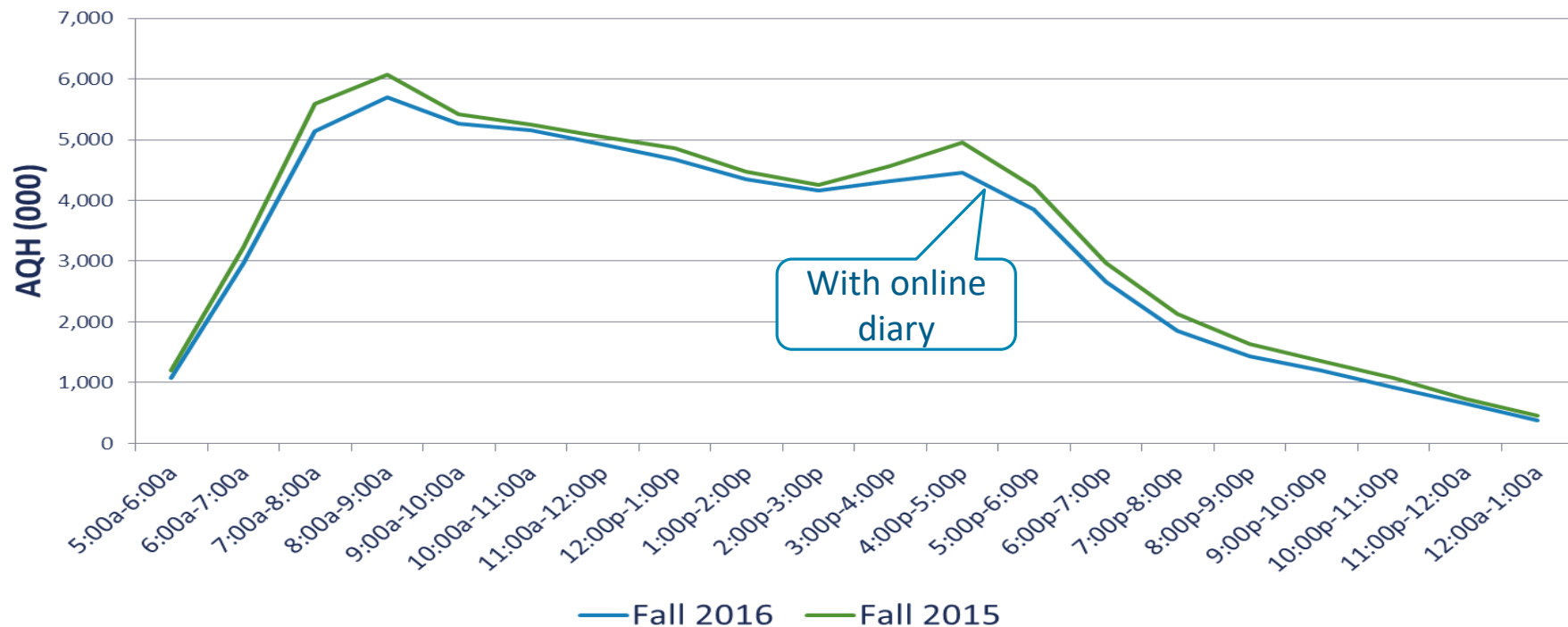
Other audio: i.e. CDs and LP's, mp3 music, on-demand listening on radio websites and podcasting, music services like Spotify, Youtube, etc

Canada: Impact on listening

Comparing reach and listening levels

- Overall Reach similar with the online option included, but ~3% lower for A18-34
- Average listening (AQH) for "age 18+" is 10%-15% longer in online diary but coming from ~20%-25% fewer tuning sessions
- ~10% less overall listening for online diaries for "age 18-49" and "25-54"
- Large variability in the 62 English markets, but much lower variability in the 33 French markets
 - Variability by market strongly related to intrinsic demographic composition (e.g., medium-small markets with colleges and retirement homes, markets with either emmigration or immigration of economically active population)

Canada: Listening AQH “age 12+”(Mon-Fri)



Canada: “Other audio” makes no difference

Fall 2016*	Share of “other audio” to total listening AQH (000)	
	Paper	Online
18-24	2%	4%
25-34	2%	3%
35-54	3%	4%
55+	3%	5%

*Fall 2016 diary designed to collect limited types of “other audio” listening

UK comparable information

1. About 11 % more listening sessions for online respondents
2. Average listening session about 25% shorter for online respondents
3. Number of stations listened ~1 more than for paper respondents
4. Listening hours per capita about 5% lower for online respondents

Back to hypotheses: yes or no ... ?

1. There is no difference between those who choose to fill in the diary online compared to those who choose the paper version
2. There is no difference in filling in an online versus paper diary
3. Online and paper diaries are methodologically the same, producing the same level of listening

Conclusions

1. Fairly similar findings despite the use of different sampling methodologies and different diary designs
2. Differences in listening between online and paper respondents are driven by demographic characteristics and lifestyles
3. Some generalizations about online diary completion and listening levels are different from the findings in the UK