

# IM RADIO TRACK - 2002

Below is an article based on the findings of a research carried out by Initiative Media for Mumbai.

## Topline Findings

### Key Insights

- 12% new listeners have been added in the Students segment; 4.2% amongst Car Owners
- 71% of Housewives, 96% of Car Owners and 95% of Students have a top-of-mind recall of Private FM Channels.
- 85% of Students, 84% of Housewives and 65% of Car Owners have increased their time spent on radio since the FM launch. This increase has happened across all day-parts.
- Radio listenership is a 'daily' and a 'at home' phenomenon for the majority of the audience
- Film Music is the preferred content across all segments and as a result of the good music on Radio FM 66% of the listener's claim that they have reduced their time-spent on TV Music Channels.
- Radio Mirchi steals the show in terms of top-of-mind recall as well as listenership across all segments

## Impact of Private Radio FM launch in Mumbai

### Findings of IM Radio Track, 2002

Initiative Media commissioned a research to understand the impact of the launch of Private FM Radio Stations in Mumbai

The research was conducted amongst Radio Listeners across key segments of Housewives, Students and Car-Owners

### Primary Findings

Yes! There has certainly been a significant impact on the media consumption habits of Mumbaites after the launch of Private FM Stations in Mumbai

Car Owners and Students are the two prime segments that have been impacted considerably. The Housewives segment was also studied but the impact on this segment is not as dramatic.

The impact has been measured via the research in terms of the following parameters:

1. Creation of new radio listeners post-FM launch
2. Increase in time-spent listening post-FM launch
3. Share of Mind of Private FM stations v/s AIR FM

Comparison of interplay of audiences between Radio and TV pre and post-FM launch

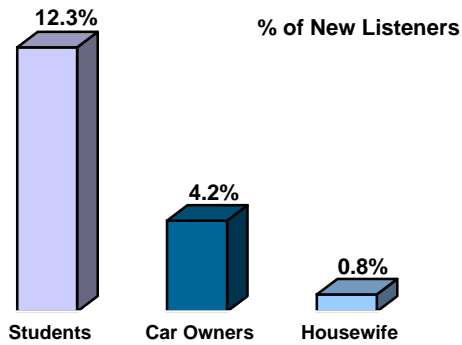
The Research serves as a baseline study for benchmarking on Attitudes to Radio, Advertising and Radio Media Consumption Habits of Mumbaites in the FM Scenario.

For further details contact Premjeet Sodhi at  
[im\\_ccp@lowemail.com](mailto:im_ccp@lowemail.com)

## Impact of Private FM Launch

### Creation of New Listeners:

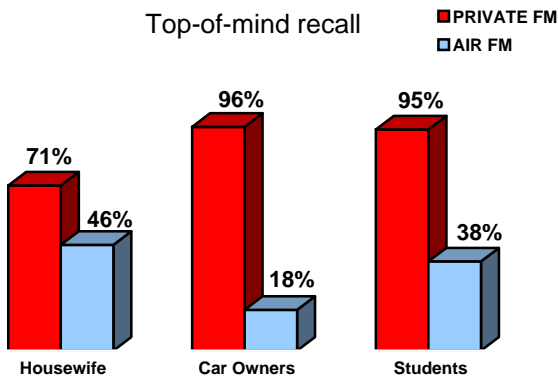
Post the launch of Private FM Radio, 12.3% new radio listeners have been added in the Students Segment



and 4.2% in the Car Owners Segment. There is hardly any addition in the Housewives segment.

### Top-of-mind recall of Private FM v/s AIR FM:

Launched just a few months ago, but the private FM Channels have gained a huge share of mind of the radio listeners. A Top-of-Mind recall of radio stations shows that across all segments of listeners private FM scores far higher than the recall of AIR FM



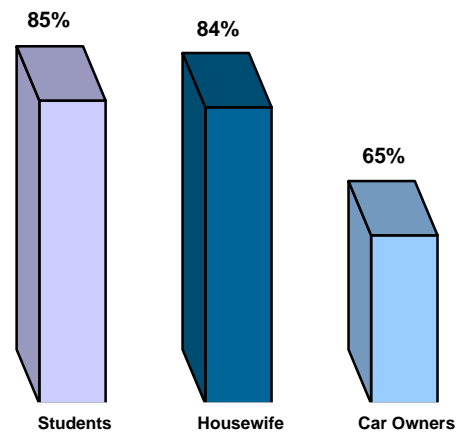
Again, we see that the Car Owners and Students reflect a much higher recall for Private FM than the Housewives. Also, the recall of AIRS FM is the highest among Housewives. Clearly the housewives 'stickiness' to AIR FM is high and hence there is a

lower impact of Private FM on this segment

### Increase in time-spent:

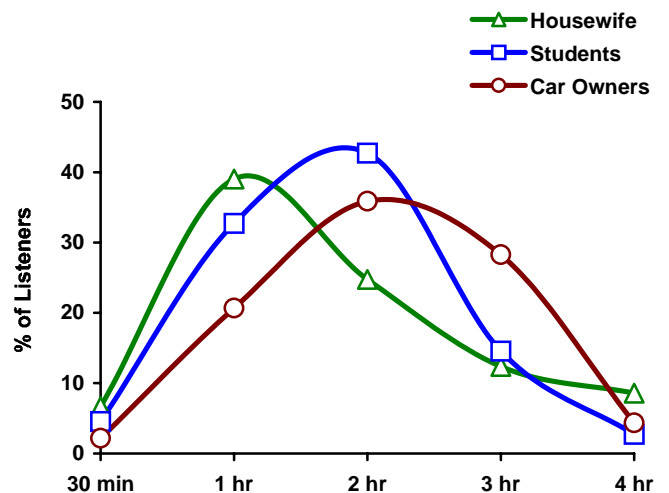
When quizzed if their time-spent listening to Radio had increased post the launch of Private FM Channels; 75% of the respondents claimed that their time spent had increased.

% of listeners who increased time-spent



A look at the time-spent by each segment also shows interesting results.

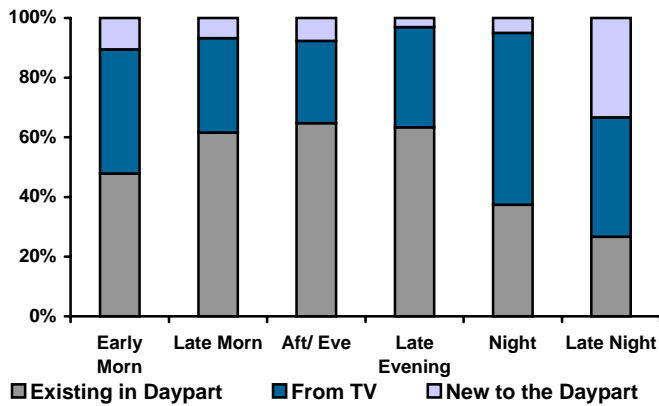
On an average the Housewives spend the least time on Radio while Car Owners appear to be tuned-in for the longest time.



**Shifts in Day-parts Listenership:**

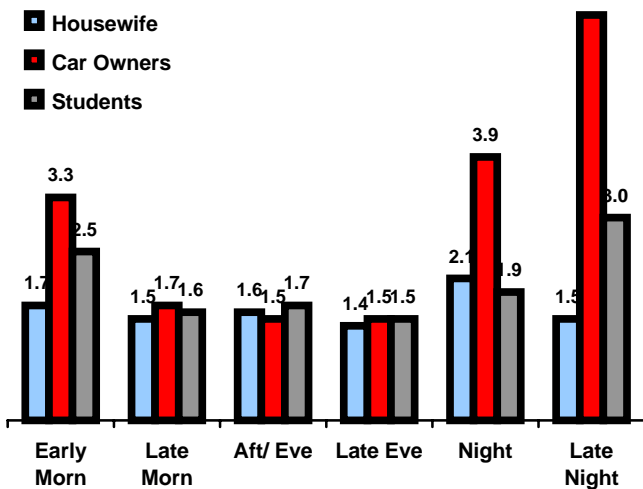
A detailed analysis of the Medium (TV, Radio, Both or None) that the respondents interact with during different day-parts was explored in detail. It is observed that there have been rampant shifts in the media in each day-part. Radio has increased its share in all day-parts with a particularly significant share in the Early Morning Daypart and the Night & Late Night Daypart.

**% break-up of listeners in each day-part**



If we Index the post-FM listenership to the Pre-FM listenership for every segment across dayparts, we find that all segments have registered an increase in the listeners in all dayparts. However, it is the Car Owners that show a dramatic increase, especially in the Early Morning, Night and Late Night time-bands.

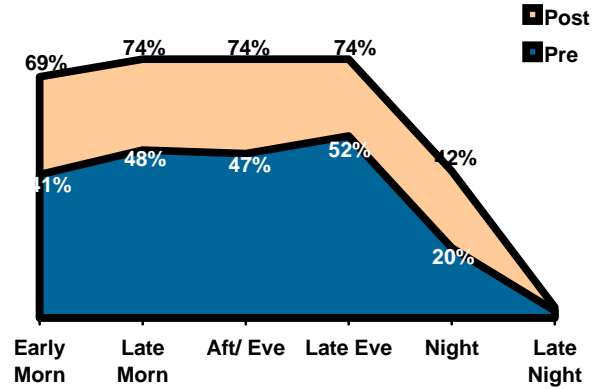
**Index of Increase in Listenership**



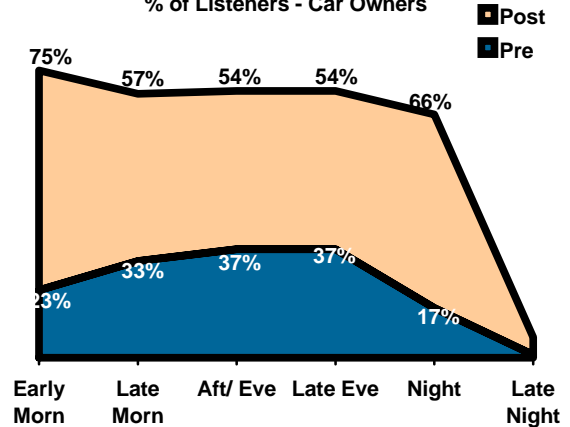
**Listenership by dayparts:**

Given below are the graphs representing the listenership of the three segments across dayparts.

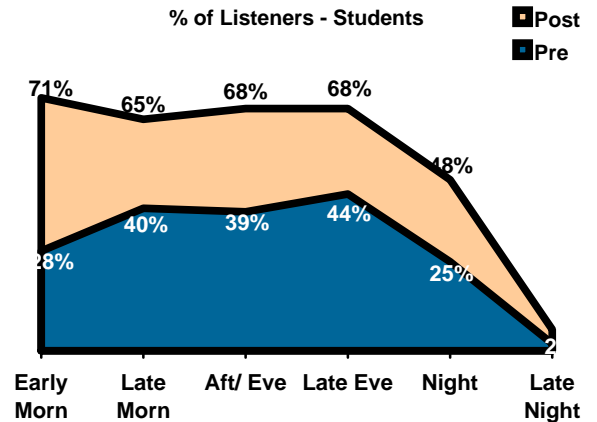
**% of Listeners - Housewives**



**% of Listeners - Car Owners**



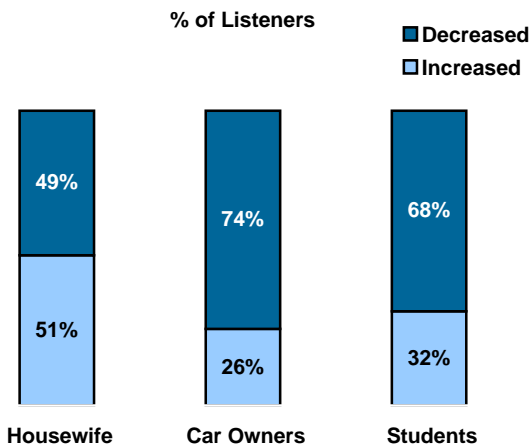
**% of Listeners - Students**



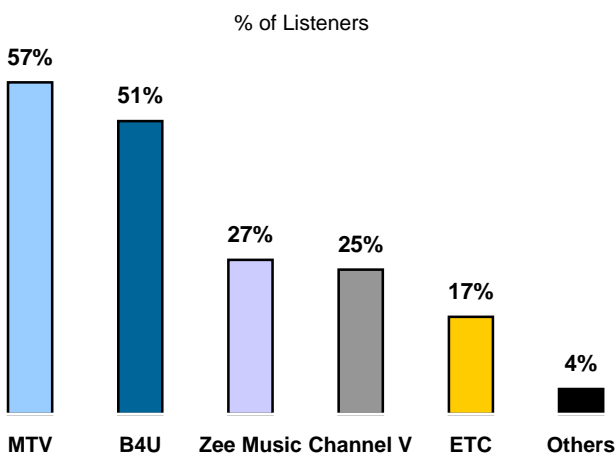
## Interaction with TV Music Channels

### Overlap of TV and Radio for Music:

TV being all-pervasive, it is observed that almost 90% of radio listeners also tune-in to TV Music Channels regularly. However, there is not a very clear direction as to the impact of the Private FM launch on the consumption of TV Music Channels. While 66% of the listeners claim that they have reduced their time-spent on TV Music Channels, another 34% claim that their time –spent has increased. Looked at segment-wise, we see that Housewives show a mixed response on effect on time spent on TV Music Channels (50:50).



The TV Music Channels preferred are illustrated in the graph below. MTV and B4U are the favorites.



## Attitude towards Radio

### Listening to Radio is one of the ways I relax:

Students and Housewives agree (87% and 75%) use Radio as a medium to relax, but Car Owners feel otherwise (45%).

### I find radio advertising enjoyable:

All segments agree with this statement (Housewives 74%, Car Owners 67%, Students 67%)

### There seems to be more advertising on Radio:

One half of Housewives and Students feel that there is more advertising these days while Car Owners do not seem to notice this (only 35% agree)

### Radio ads are more enjoyable than TV or Print ads:

Opinion is divide on this matter but most of the listeners do not agree to the statement. Car Owners disagree the most

### Some Radio ads I enjoy, but most of them are bad:

A majority of the listeners do not agree implying that radio ads are usually not bad

### Radio is just on in the background:

Housewives (43%) have a higher tendency of 'Radio just on in the background' than Students (35%) and Car Owners (34%).

### RJ Chats, promos and ads on radio annoy me:

#### Nearly all radio advertising annoys me:

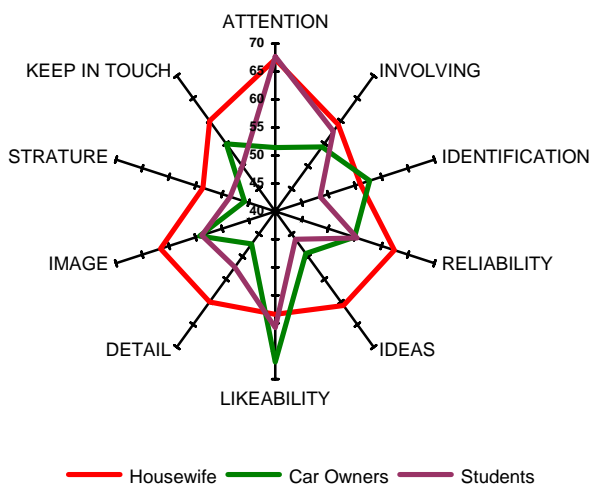
Only about 30% of listeners across all segments agree with this statement. Thus, most listeners are positive to RJs, promos and ads on Radio

## Attributes of Radio as a medium

### RADAR:

An Initiative Media proprietary research tool called RADAR was applied to the different listener segments. The RADAR plots the attributes of the media as perceived by the user segments. The interplay of various attributes is illustrated in the graph below.

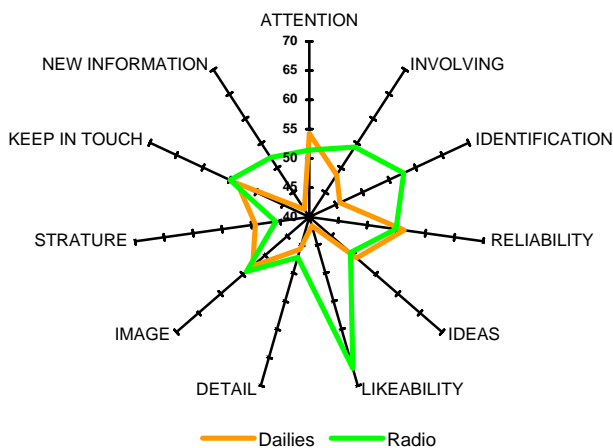
Radio scores high on Likeability and Attention.



### Radio v/s Dailies:

The analysis for Dailies as a comparison with Radio is plotted for the Car Owners to bring out the stark difference in the quality of Radio as medium.

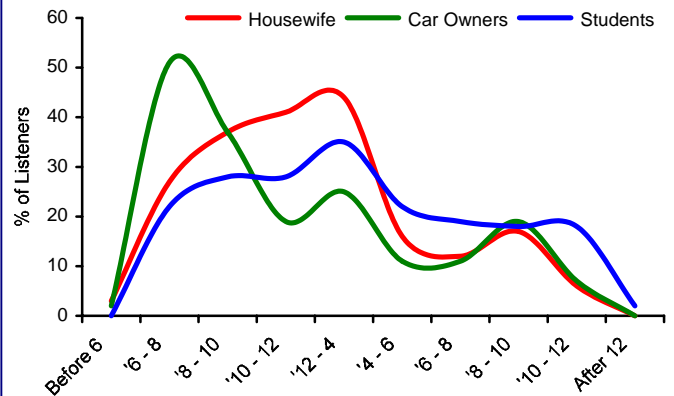
It matches Dailies on Reliability, Attention, Keep in touch & Image while scoring high on Likeability & Involvement



## Listenership Behaviour

### Dayparts Listership:

An analysis of the segments across dayparts shows that while the Car Owners have a peak in listenership in the morning; the Housewives and Students show a peak during Afternoons.



### Listnership Characteristics:

The Place of Listening 'Home' is still the most dominant with all radio listening happening at home. It is only the Car Owners segment wherein about 65% of them listen to Radio in the Car (also). The out-of-home listenership even for students is very low while 94% listen to Radio at Home (also).

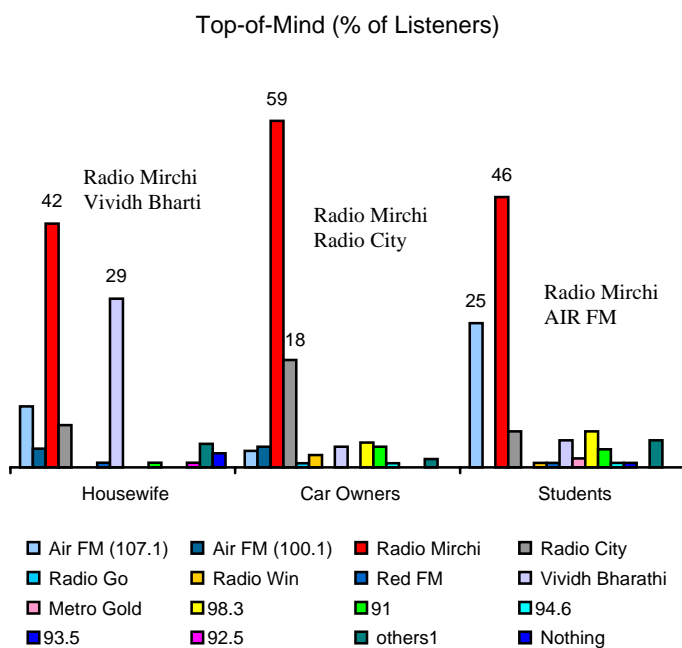
The Portable FM sets presumed to have a high incidence in Mumbai have really penetrated only the students segment wherein about 14% only are using these (while 31% are using Walkman). Radio/ Music Sets at home constitute the majority of hardware. 72% Car Owners listen to Radio on Car Music Systems.

Radio listenership is a habit and it is observed that 79% of the listeners listen to Radio 7 days in a week. Compared to other media in terms of percentage of listeners that tune in daily, Radio scores pretty close to the mainline media (TV & Press) and much higher than Cinema and Internet. In fact for Car Owners, it scores above Radio and Press to be the most frequently accessed medium. 78% of Car Owners tune in to Radio everyday but only 64% of them watch TV or read a newspaper everyday.

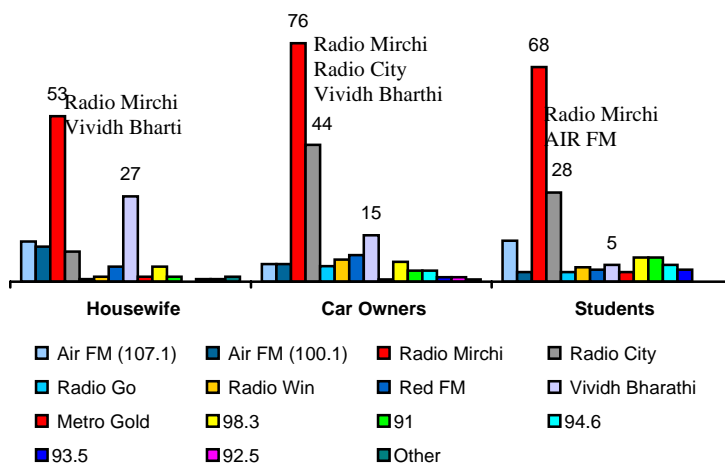
## The FM Stations:

### Top-of-Mind Recall:

Radio Mirchi steals the thunder on the top-of-mind recall scores. It also tops as the station regularly listened to across all segments. Though the preference of the 2<sup>nd</sup> radio station is varying across the listener segments, Radio Mirchi is the undisputed favourite.



### Station Listened Yesterday (% of Listeners)



## Content Preferences:

### Music Rules:

Across segments it is found that Film Music is the most preferred content. Over 75% of listeners in all segments prefer listening to Hindi Film Music from latest and old Hindi Movies.

Other than film music, students show a higher affinity for Pop and Rock Music (compared to other segments); Car Owners and Housewives score high on Hindi Classical Music and Gazals

Traffic Updates are also very popular across segments.

## FM Station Insights:

Listed below are a few of the significant inferences drawn on FM stations from the data:

- In terms of numbers of listeners Radio Mirchi and Radio Citi win across dayparts
- AIR FM and RED have more audience between 8-10 at night
- Radio Mirchi listeners prefer the morning 8-10 am slot. It has a good percentage of listeners distributed all through morning and afternoon.
- Radio Citi listenership is mostly concentrated in the morning 6-10 am timeslot
- For night listenership Radio Win has the largest share of listeners
- 50% of the AIR FM 107.1 listeners are clustered around the morning 6-8 am timeslot
- Radio Citi, Radio Win and AIR 100.7 listeners are mostly light or medium TV viewers

Radio FM has certainly created an impact in Mumbai. It is a clear success story for the FM Channels. Listenership has taken on – it remains to be seen how the advertising spends move in favour of the medium.