

# Re-thinking radio research for the PPM era



PPM represents one of the most profound changes to radio since the arrival of TV. It is transforming the way radio is programmed, sold and marketed. And it will change the way we research radio.

Frankly, it's about time.

Research has lagged behind the industry's needs for a number of years now. The way we research radio hasn't changed in any fundamental way in the past 30 years, even though the medium has undergone several major transformations.

Since the arrival of the Walkman some 25 years ago and amplified by the arrival of mp3s, Internet radio and satellite radio, terrestrial radio has long been fighting competition from alternative audio options. Yet, virtually no research has taken a big picture view on how all of this has changed the role that radio plays in listeners' lives, or how listeners use various types of formats.

At the same time, increased fragmentation, consolidation and now the economic downturn are exerting a huge pressure on costs. But the vast majority of radio research continues to be conducted using increasingly costly (and increasingly imprecise) telephone methodology.

The shift from diary to PPM measurement may be the tipping point. By moving the goalposts from generating recall to increasing usage, PPM changes the nature of the game itself. And it's up to us as researchers to either raise our game or sit on the bench.

Three areas where research needs to change to meet the PPM challenge:

1. *Fewer "top-of-mind" questions, more prompted recall.*

In diary measurement, where listeners have to remember and write down what they listened to, it's relevant for your researcher to ask top-of-mind questions about which stations the listener recalls tuning. This approach is less appropriate in a PPM world. Ideally, listeners should be presented with a roster of station names and dial positions so they can more accurately remember which stations they actually did listen to and would have been recorded on their PPM meter.

2. *Fewer positioning and market image questions, more questions that capture drivers of usage.*

In a diary/recall world, it's useful to track positions such as "the one station you think of first for being your 'at-work' station"—the station you remember when you are asked this question is the one you'll write down in your diary, even if it's not the one you actually listen to at the office. But not when PPM measures tuning. PPM puts the onus on understanding usage, not recall—why people choose one station over another. This shifts the focus from the traditional "perceptual" study that radio has relied on for the past 30 years to the "usage and attitude" studies common in the packaged goods industry that probe how and why consumers make choices.

3. *A deeper understanding of different layers of loyalty.*

The traditional approach to radio

research has been to identify P1 listeners (listeners who name one station as the one they listen to most often) as the most important segment of a station's audience. P1s are seen as the rock-solid core upon which a station depends for the vast majority of its hours tuned. In fact, PPM shows that, for a large proportion of listeners, the station they listen to most often can change from week to week. Your research needs to reflect this reality, peeling the onion to help the station understand how many of its P1 listeners are truly loyal and how many are regularly shifting allegiance. And, of course, why.

Some of these adjustments into radio studies are being done in PPM markets. Online market studies naturally lend themselves to some of this, by allowing respondents to be presented with a list of stations to refresh their memory of stations they actually listen to. And new questions are being included that dig into those attitudes and motivations that drive radio listening and station preference.

But, like the programmers and salespeople who are now dealing with the new methodology, we're still only scratching the surface of the full implications of PPM.

The need for change is clear. George Bernard Shaw may have said it best, though I somehow doubt he was thinking about radio research at the time: "The only man I know who behaves sensibly is my tailor; he takes my measurements anew each time he sees me. The rest go on with their old measurements and expect me to fit them."

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