

GroupM and Oasis international present Pakistan's first ever Radio Establishment & Listenership Study

Radio, over the past few years, has emerged as a major communication medium owing to the growth in its listenership. Advertisers are increasingly sold on this listenership due to the specialization and the geographic and psychographic niches, radio stations seem to have created and perceptually owned.

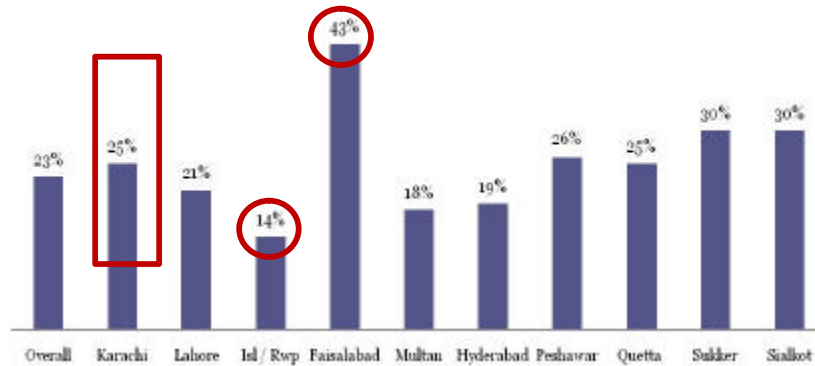
Having surpassed 3.2% of overall media spend pie, radio advertising in Pakistan was measured at over Rs. 550 million in 2007, while it further increased to Rs. 900 Mn in 2008. However, there has been a scarce lack of info available on radio as a communication medium.

This called for a syndicated study, meant for advertisers, media planner & broadcasters alike, which could provide not only baseline information on radio penetration & listenership patterns, but also sheds light on brand imagery of radio brands.

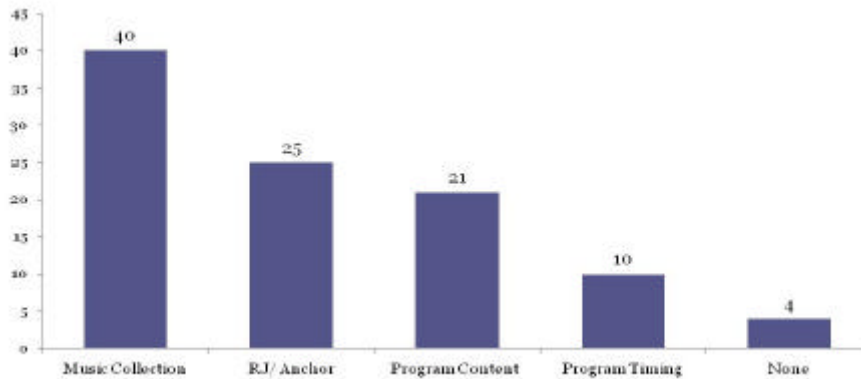
Thus the researchers interviewed 3640 respondents. Face to face interviews were conducted. Following is the sample spread with city & target group split:

City Name	ALL	Working Men	Male Students	Female Students	Housewives
ALL	3640	935	885	894	926
Karachi	754	194	187	185	188
Lahore	411	104	97	96	114
Rwp/Isd	308	79	77	80	72
Faisalabad	314	85	76	78	75
Multan	315	84	72	79	80
Hyderabad	308	76	78	76	78
Peshawar	308	78	75	73	82
Sukker	302	76	73	77	76
Sialkot	308	78	76	74	80
Quetta	312	81	74	76	81

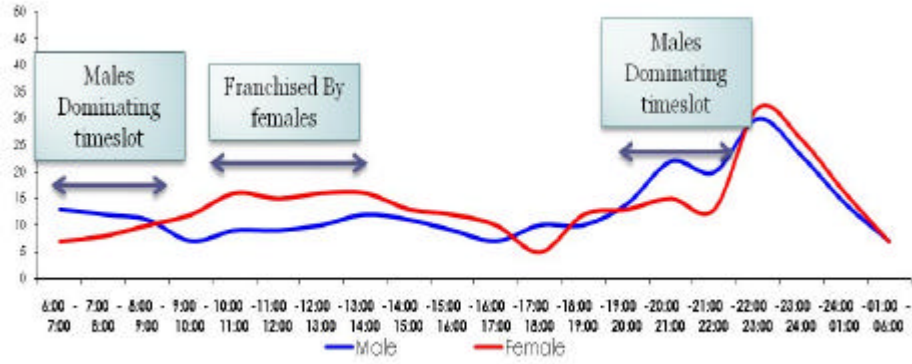
There were some rather interesting results obtained through this study.



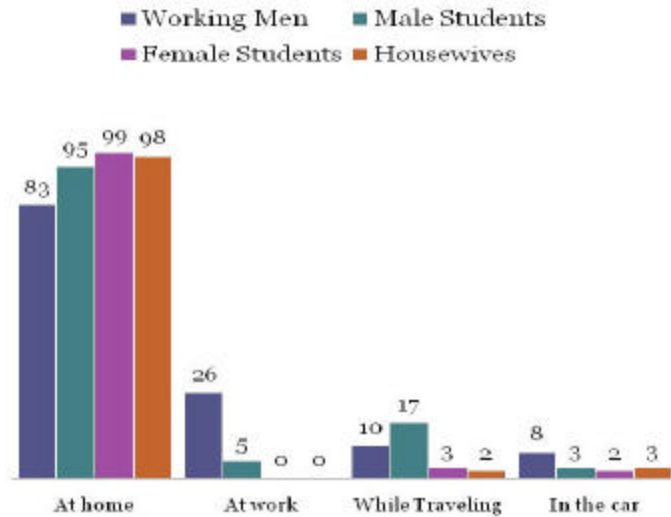
The incidence of yesterday radio listenership is the highest in Faisalabad & the lowest in Rawalpindi/Islamabad.



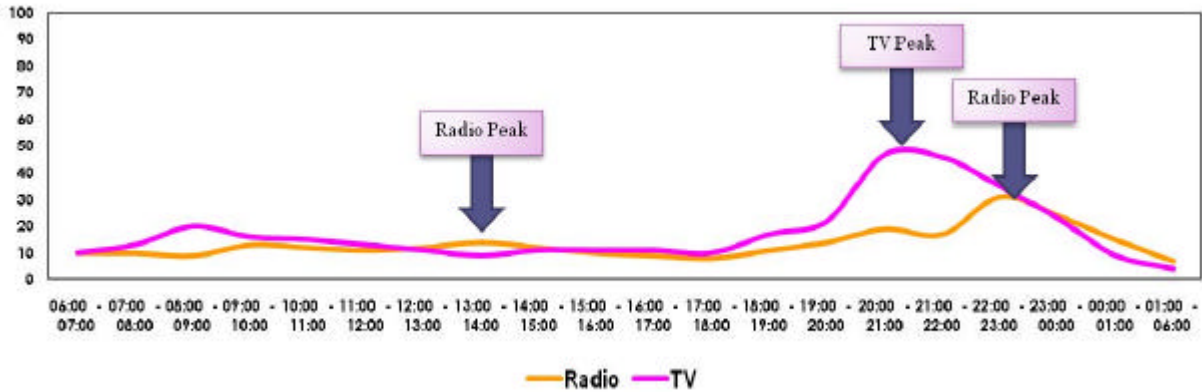
Very understandably, music collection is the biggest reason for listening to a certain radio station regularly; RJ liking gets the second highest votes. This, in turn, may mean switching brands with changing RJs!



Drive time, specially evening drive time seems more of a myth. Overall listenership in both males & females is the highest at night.



In-car listenership or during-travel listenership is not very high among the masses. Radio listening is more of an 'at home' phenomenon. Most of the in-car & while travelling radio listening is concentrated among males.



Interesting to note that TV & radio have separately defined peaks for Pakistan, which is unlike India where radio cannibalizes share from TV. This, in effect, indicates the possibility of a better impacting 360 degree communication campaign using the two mediums. Also between 12:30 & 1:30 pm, radio listening is actually slightly higher than TV viewing among yesterday radio.

	Radio		TV	
	Holiday	Working Day	Holiday	Working Day
Overall	2.01	1.56	2.42	1.84
Gender				
Male	2.16	1.48	2.53	1.58
Female	1.83	1.76	2.21	2.27
SEC				
SECA	2.05	1.5	2.4	1.76
SEC B	2.08	1.67	2.48	1.89
SEC C	1.99	1.64	2.38	1.83
SEC D	1.95	1.59	2.41	1.85
Age				
15-24	2.07	1.53	2.49	1.83
25-34	1.88	1.61	2.46	1.88
35-45	1.83	1.79	2.08	1.87
46-55	1.71	1.34	2.14	1.69
TG				
Working Men	2.1	1.5	2.51	1.58
Male Students	2.11	1.38	2.58	1.52
Female Students	1.97	1.76	2.3	2.18
Housewives	1.86	1.91	2.15	2.35

This table clearly shows how listenership differs by gender SEC, age etc. It would be interesting to note that among yesterday radio listeners, TV & Radio consumption is not much different on holidays.

	All	SEC				Gender		Age				Target Group			
	ALL	A	B	C	D	Male	Female	15 to 24	25 to 34	35 to 45	46 to 55	Working Men	Male Students	Female Students	Housewives
Mobile Phone Accessed															
Have mobile phone	80	89	84	78	74	91	64	80	84	77	75	91	90	66	63
Usage of Mobile phone other than Call															
Sending/receiving text messages (SMS)	85	89	87	83	83	89	76	79	85	84	88	85	95	83	70
Listening radio	72	71	76	71	69	75	65	74	72	70	74	72	79	70	61
Listening to music	57	56	58	58	54	61	48	55	55	54	61	53	70	53	42
Playing games	49	46	51	52	46	58	28	50	51	46	52	56	62	33	25
Taking/sending photos	18	24	22	16	12	22	9	13	17	18	19	20	23	11	9

Very interesting to note that among the mobile phone carrying population, the phenomenon of listening to radio on phone is very high i.e. 72%. This is more a male driven factor than females & highest in SEC B.

The purpose of this exercise is to provide the industry with a currency to work with. Given the marked increase in radio advertising & its importance in the 360 degree communication plan, slowly but gradually, the industry will eventually have to move to a RAM system – Radio Audience Measurement. This study, although, is an establishment & listenership study, it will produce a onetime/stationary rating for all radio stations covered through it.