## Radio: The Online Multiplier



**Key Findings** 

## **Background**

Why we conducted this study

# In 2000, the BIG question was how do media work together to drive awareness?





## In 2010, the BIG question is to what extent do offline media drive online success for brands?

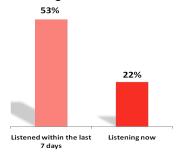




#### Previous findings about radio & online 1



## A high proportion of broadband users are listening to radio when online

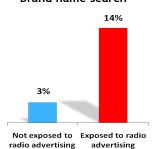




#### Previous findings about radio & online 2



### Radio advertising multiplies brand name search





### Our hypothesis

If Google is the last stage of the 'click journey'...

- •'In-market' consumer
- · Sector-generic search
- Converting demand



#### Our hypothesis

If Google is the last stage of the 'click journey'...

- •'In-market' consumer
- Sector-generic search
- Converting demand

...then RADIO is an effective first stage of that same click journey

- •'In- and Out-of-market' consumers
- Brand-specific search
- Creating demand



#### The questions we set out to answer

- To what extent does radio advertising effect the way listeners browse brands online in the real world?
- 2. What sort of radio campaigns are most effective?
- 3. How could brands use these findings to enhance effectiveness?

#### Our research partners







## Methodology

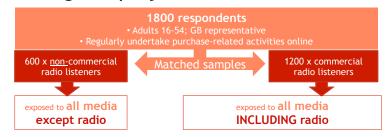
How we conducted the study

#### A ground-breaking approach

- Single-source data
- Direct link from offline ad exposure to actual online browsing behaviour
- Actual, not claimed



#### Structuring the project



#### Structuring the project



#### Identifying campaign exposure

We collected information about radio listening habits...

```
Q5: Which ONE radio station have you listened to MOST over the past SEVEN DAYS? (DO NOT PROMPT PLEASE RECORD ONE RESPONSE ONLY
             Juice FM ***
                                                                BBC Radio 4
             Smooth *
                                                               BBC Radio Five Live
      □ Century *
                                                         □ Classic FM
                                                               BBC Radio Merseyside
             Buzz 97.1 *
                                                               talkSPORT
             Radio City *
             Magic *
                                                         □ Virgin Radio *
             BBC Radio 1 *
                                                         □ Other - please state
             BBC Radio 2 *
                                                         □ Don't know
             BBC Radio 3
                                                               None
OTHER - please state
```



#### Identifying campaign exposure

We collected information about radio listening habits...

Juice FM ***	BBC Radio 4
Smooth *	BBC Radio Five Live
Century *	Classic FM
Buzz 97.1 *	BBC Radio Merseyside
Radio City *	talkSPORT
Magic *	Virgin Radio *
BBC Radio 1 *	Other - please state
BBC Radio 2 *	Don't know
BBC Radio 3	None

...and overlaid this with J-ET spot transmission data for all live radio campaigns during fieldwork







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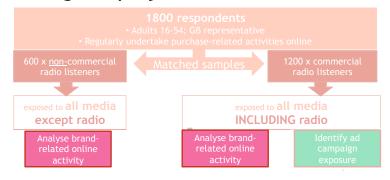
...to establish each respondent's exposure to individual radio ad campaigns

Radio spot transmission matched with listening patterns





#### Structuring the project



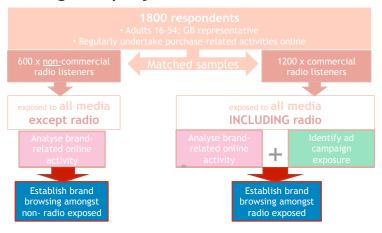
#### Analysing browser history

- Unique software developed solely for this study
- When downloaded, extracted 4 weeks of browser history
- Respondents able to edit out sensitive information, e.g. online banking details

```
Today - Friday February 20, 2009
   8:15 AM ### BBC - Homepage
Yesterday - Thursday, February 19, 2009
   11:13 PM T Online Grocery Shopping & Delivery Service - Tesco.com
   11:13 PM T Tesco.com - Sign out
   11:13 PM T Tesco.com - See Cheaper Alternatives!...
   11:12 PM Tesco.com - Superstore
   11:12 PM T Tesco.com - Your order details
   11:11 PM T Tesco.com - Your Grocery Orders
   11:10 PM T Tesco.com - Order Change Confirmation
   11:10 PM T Tesco.com - Grocery Shopping - Lite Checkout
   11:08 PM T (Untitled)
   11:07 PM T Tesco.com
   11:05 PM T Private Gallery Chardonnay Viognier 75cl product information - Tesco.com
   11:05 PM T Private Gallery Red 75cl product information - Tesco.com
   11:04 PM T Tesco.com - Superstore
   11:04 PM T Tesco.com - Signin
   11:03 PM T Cocopia Luxury Artisan Chocolates Assorted 90g product information - Tesco com
   10:61 PM T Tesco.com - Tesco.com - Special Offer
   10:49 PM T (Untitled)
   10:49 PM T Tesco.com
   10:44 PM T Danepak Perfect Pork Loin Steaks420g product information - Tesco.com
    10:39 PM 🎛 Colmans Casserole Mix Sausage 40g product information - Tesco.com
   10:39 PM T Schwartz For Sausages Leek & Mustrd 35g product information - Tesco.com
```

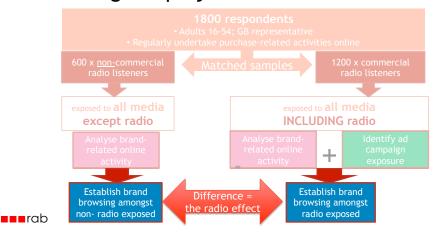


#### Structuring the project





#### Structuring the project



#### Filtering the campaigns for reporting

Initial pool = 45 campaigns

Minimum of 50 x CR listeners exposed

Actively direct online

FINAL POOL



### Final pool = 23 campaigns across 5 sectors

Insurance	Travel	Motors	Telecomms	High Street Stores
swiftcoversum  MORE TH>N®	Aer Lingus Accounts  Stena Line Making good time  Monor Count  easyJet  BRITISH  ARWAYS	Mercoder-Benz  WALDWALL  RENAUT  PEUGEOT	ECarphone Warehouse  Phones  Voddfone  BT  Orange	DEBENHAMS  S  S  S  S  S  S  S  S  S  S  S  S



#### The wider media context

- All 23 campaigns used at least three other media
- All used Internet
- On average, spent 10% of media budget on radio

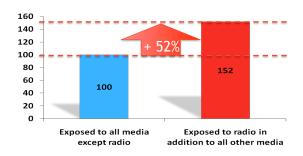
### Summary of Key Findings

How radio advertising boosts brand browsing



# Finding 1: Exposure to radio boosts brand browsing by 52%

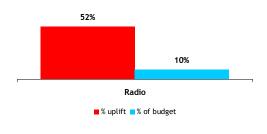
Average uplift in brand browsing online across 23 campaigns





#### Finding 2: Radio is 4x more cost-effective than other media

Uplift in brand browsing driven by radio vs. proportion of media investment



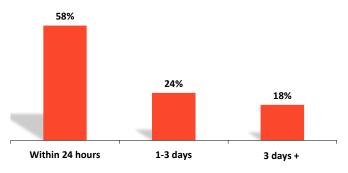


Source: DollyWagon/Other Lines/NMR

Base: 23 campaigns

# Finding 3: Radio has an immediate effect on browsing

Proportion of total browsing vs. time since last exposed to radio advertising

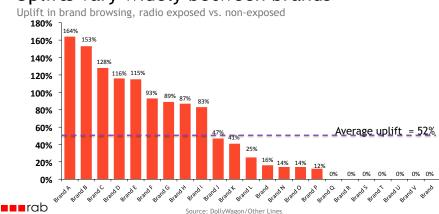


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Source: DollyWagon/Other Lines

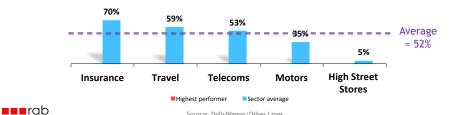
Base: 23 campaigns

## Finding 4: Uplifts vary widely between brands



### Finding 5: There are significant differences by sector

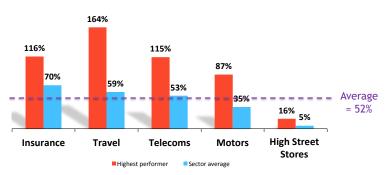
Average and maximum uplift by sector



Source: DollyWagon/Other Lines

# Finding 5: There are significant differences by sector

Average and maximum uplift by sector





Source: DollyWagon/Other Lines

## Finding 6: Creativity is crucial in delivering optimum effect

Influential characteristics based on analysis of top-performing campaigns





Source: RAB analysis

### URL format can impact results

URL format	No. of campaigns	Average uplift in brand browsing
CONVENTIONAL e.g. brandname.co.uk	18	55%
FORWARD SLASH e.g. brandname.co.uk/offers	4	49%
VANITY e.g. adstrapline.co.uk	1	0%



#### Summary

- Radio advertising has a "turbocharger" effect on brand browsing online
  - 52% average uplift
  - Immediacy of response
- 2. Radio is a highly efficient method of multiplying a brand's online presence
  - 4x more cost-effective vs. other media
- 3. Advertisers can significantly enhance Radio's Online Multiplier Effect through creative development

### Radio: The Online Multiplier



Thank you