

# **BROADCAST ARCHITECTURE®**



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**The *REAL* people of PPM**

# INTRODUCTION

Ever wonder what it would be like to sit down and talk with a real PPM panelist? We did too! That is why Broadcast Architecture® has launched the first independent respondent-level study on PPM panelists' behaviors and perceptions.

While there is a lot of Arbitron-sponsored research making its way around the industry, we thought it best to take a new path and find PPM panelists on our own. We approached this using the same logic that we apply when conducting research for our clients. We wouldn't recruit participants for a qualitative study on a morning show with people provided to us by that morning show, because it wouldn't give us the most objective group of people to talk with.

This is only 'session #1' of an ongoing study that we'll continue to develop over the course of the next several years. Our goal is to assist our clients in better understanding PPM participant behaviors, motivations and perceptions. The information you are about to see is what we refer to as a QUAL study; in other words, the information is not necessarily quantitative and when we talk percentages, we are not making statistical conclusions. Rather, we are attempting to get a 'feel' for what is behind the motivations, thought processes and behaviors of panelists who literally have our fate in their pocket.

We hope you find this written presentation useful. It is a highlight summary of the nearly 7 hours of video-taped interviews we conducted. We have made the decision not to post video footage on our website. This is out of our respect for the fact that, although each respondent understood that we'd be videotaping, these are private citizens and we do not want to open them up for public scrutiny, which can take place once an image is posted on the internet. While the written report will offer some compelling insights, there is nothing like seeing these real people 'up close and personal'. The video will more vividly display our written findings. If you have further interest and would like to see our 45 minute video highlight DVD presentation, please call Broadcast Architecture's Owner/President Allen Kepler (805)719-2806. You can also contact him via email at [AllenKepler@BroadcastArchitecture.com](mailto:AllenKepler@BroadcastArchitecture.com).

# THE SAMPLE

To conduct this initial phase of our study, Broadcast Architecture completed one-on-one interviews with 13 former and present PPM panelists. BA contracted with an independent research company / field service to identify, qualify and recruit participants. No name list or data was provided by Arbitron. All interviews were conducted in-person and videotaped. Each interview lasted approximately 30 minutes.

We felt it important to talk with more than one individual per household so that we could investigate some of the family dynamics that take place within the panel. The sample included respondents from 7 different households. Ages ranged from 19 to 67. We spoke with 8 women and 5 men. Diverse ethnic backgrounds were represented as well.

Among the households we interviewed, most had at least two children in addition to the parents. One household had 8 PPM panelists including: mom, step-dad, brother, 2 cousins, uncle, aunt and the young woman we interviewed. We also talked with one single gentleman and a couple of mother-son households.

Most of the respondents were recent PPM panel members: 70% of the group either wrapped up their PPM participation toward the end of 2009, in 2010 or were still on the panel. The two respondents who were currently on the panel stated that they had already completed two years of carrying meters, and that this was their second time on the PPM panel. All took part for at least 10 months and over 50% carried meters for 2 years or more. Four respondents participated between 2006 and 2008.

# THE GOAL OF THIS STUDY

The long-term goal of this ongoing study for us at Broadcast Architecture is to continuously track PPM participant behavior, motivation and perception. We see this as a powerful way to assist our partners in better serving their customers, who also happen to be carrying the meters. We also feel an obligation to independently track the real world experience PPM members have interacting with Arbitron, the actual meter, the equipment and the process. By gaining a better understanding of the mindset of a person who will sign their household up for a two-year commitment, radio can do a better job connecting with these panelists. Along the way, we feel we can also come up with useful suggestions to help improve the process.

There has been a lot written and even debated about the impact of PPM on our industry. We hope our study will help you to drill down to the real life experience of the typical PPM participant. This is the focus of this project. There are many analytic tools and Arbitron-sponsored (and authored) data regarding recalled listening vs. real listening. Different types of passive and active listeners have been identified as well. However, to date no one has reached out into the community, independent of Arbitron, to find out what is going on in the mind of the typical PPM participant. Facts and/or figures stated in this summary are based on respondent recall and are not necessarily 100% accurate.

This is only 'session #1' of our ongoing study and we hope it answers some questions, raises even more and ultimately helps all of us to better understand the process.

# MEET THE PANELISTS

## How were they recruited?

We often hear the question: “Where does Arbitron find these folks?” The majority of the people we spoke with said that Arbitron simply ‘showed up’ at their home or apartment. Several people told us “they just knocked on our door”. Typically contact was made with one person in the household and others were ‘volunteered’. One woman told us “my mom signed us all up and told us later”. A few received something in the mail and were asked to call back if they were interested in participating and a couple had flyers left on their door. One guy thought that he was selected because he had done a Nielsen survey previously.

## Recall of Favorite Station and listening vs Reality. There have been

There have been studies that compare recall vs. actual listening and it is widely known that participants using the diary method listed far fewer stations than what is reported now as actually heard by the meter. These findings were definitely reinforced. One woman clearly named her favorite station “102”, and said “That’s all I listen to”. But when I asked her to take me through a typical day of radio listening, she said she hears 99.1 all day at work because it “has to be for everyone”. She also stated that although she listens to 102 in the morning starting when she wakes up, she does not undock her meter until she leaves for work! Most respondents only named a couple of stations. It remains anecdotal due to the small sample, but three of the four people who stated that the primary reason they participated in PPM was to share their ‘voice’ named public/non-commercial radio stations as their favorites, and strongly claimed not to listen to any commercial stations. It was also interesting in the household of mom, dad and daughter that all three named country and classic rock as the music they listen to most. The daughter had a different country favorite and added that she also listens to “Mix”, but incorrectly called it 95.4.

## **Lots of focus on - but some confusion about - the 'POINTS'.**

Each respondent almost immediately wanted to tell us about the points. All seemed to know that they needed to 'keep it moving'. Some thought they got more points if they were actually moving more. One guy felt he earned more points when he was playing basketball and driving around. A few thought you got more when listening to 'music'. One woman who wore her meter said; "I would carry it until it ran out of juice". A couple of people mentioned that you needed to keep the green light on by wearing the meter and that it would only collect data when the green light is on. They didn't quite understand the variance in how much they got paid, which they felt was based on their total monthly points. One respondent stated "if you don't move it's not going to give you points, but if you're moving around throughout the day it'll keep active so it'll give more points."

## **There was active competition to earn the most POINTS.**

One guy summed it up well: "Money aside, my favorite thing about the process was the points system." Several referred to it as a game or a contest to see who in the family could get the most points. "We had a competition"; "It was like a contest". Many also mentioned that Arbitron offered bonuses during certain weekends. The points were easily equated with 'more money' and 'bonuses'. Most generally knew that 'the more you wore it, the more points you got'. Some mentioned weekly and monthly raffles too. Some received calls telling them if they could get a certain level of points for a particular weekend, they would receive extra money. Much of each 30 minute interview was focused on the points system and compensation.

## Money was a key motivator and compensation varies dramatically.

The complete details on this segment will be clearer in our video recap. Some families received only 15% to 20% of what other families received. The large household that included eight panelists also seemed to be the highest paid - per person. Even when some lost meters and had certain family members that didn't carry their meters, they still reportedly received three to four times what panelists in other households got. Some families reported receiving \$25 to \$35 per month (per person), while others ranged from \$150 to over \$200 per person. When asked the #1 reason they participated in PPM, the overwhelming answer was "MONEY".

## Compliance issues - "They call it cheating".

This word was brought up by a few respondents and we heard about outright manipulation from four of the seven households we spoke with. Two different respondents (from different households) told us about hanging a meter on a ceiling fan in order to 'keep it moving and earn points'. Others mentioned that one would grab a meter for another family member when they forgot it. One couple would 'jiggle' each other's meters when the other was in the shower in the morning to get points. They would also occasionally carry it for each other, and some lost meters over the course of time. Although this was a small group, cheating was mentioned by a high percentage of them and it seemed to be driven and justified by the desire to get more points and a bigger check each month. Others had problems complying and would fall asleep with the meters in their pockets, or forget to dock, undock or take it with them during the day. A couple mentioned that the meters ran out of battery in the middle of the day at times because they forgot to charge at night or didn't take it off. One respondent who really 'enjoyed' the process still admitted to cheating and carrying her son's meter for him. She also mentioned her son hanging the meter on his ceiling fan and summed it up by saying; "it's cheating I know and I know we shouldn't do it, but we wanted to make sure our numbers were still there!"

## Most pick up the meter on the way out the door.

One woman who watches TV in the morning actually said as soon as she wakes up. She stated: “I grab my pajamas and strap my meter on”. The most common behavior was grabbing the meter when they walk out the door. Two women in particular told us that they hear the radio first thing in the morning from when they wake up until when they leave, but that neither undocks the meter until they leave. One woman who listens at home every morning vividly stated about her routine “cell phone, meter, purse ... out the door”. The other said “radio wakes me up in the morning, but I won’t have my meter on at the time ... it first hears radio on my drive to work.”

## Perception: Not all of my radio listening is being picked up by the meter.

Most respondents talked in detail about their diligence in trying to compete to earn more points and thus, more money. Many mentioned that they did forget to wear their meter from time to time so we asked them to estimate what percentage of their overall radio listening they felt meter was actually picking up. Answers ranged from 45% to 100%. Most estimated somewhere between 70 and 80 percent. Some could not come up with an actual percentage, but it is concerning that the perception was not higher from those who guessed for us.

## All refer to it as a PAGER and most stuck it in their pocket.

Some quotes included: “It looks like a big pager”, “everybody thought it was a pager”, “A lot of people would ask about it”, “I got teased... you need to update”. Some said it worked fine and that “I just put it in my pocket and went about my day”. One guy unscrewed the clip and removed it so it would fit down in his pocket better. Another had his in his pocket at the interview and a woman had her meter in her pocket and then clipped it to her jeans when she showed it to us.

## A few complaints about the pager (meter)...

Many mentioned that it was ‘big’, ‘bulky’ and ‘cumbersome’, including the two currently active panelists. It was almost a unanimous suggestion that they ‘make it smaller’. One guy got tired of it on his waist and clipped it on his sock. A woman actually clipped it in her bra! Her complaint was that “sometimes I would have indentations in my chest”. Most didn’t seem to use the clip. One woman suggested they put it in a watch. A couple of people complained about having to remember to charge it, plug it in at night, take it everywhere, etc. “It would bother me when I was getting dressed up to go out someplace and had nowhere to clip it.” One just put it out there and said “It shouldn’t look like a pager.”

## **Arbitron gets mostly high marks for “customer service”.**

While most of the respondents focused on the money, saying things like “they paid us handsomely”, “they send you a check just to wear a meter”, “It was like getting paid for free” and “the checks always came on time”, some people also said they “enjoyed their time with Arbitron”, and that Arbitron representatives were “friendly and nice” and “a lot of fun.” There were a few comments about privacy like “uncle Sam is watching” and a couple of people were annoyed by the reminder calls. One guy said “They can be a bit much at times.” Another guy just laughed and said “They’ve been watching us in the bathroom for 20 years... they’re gonna do what they’re gonna do!”

## **Almost all mentioned they felt it measured TV, movies, DVDs, radio and even worked in the movie theatres.**

Most mentioned television first and seemed very interested in the thought that the meter measured their favorite TV programs. Many thought it was measuring commercials they saw on TV, heard in theatres, radio etc. All knew radio was being measured, but it was not their focus. We had to direct them back to talking about radio from time to time.

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