Results

Online audio advertising effects study with MeinFernbus FlixBus

Agenda

1	2	3	4
Study design	Reporting	Results	Lessons learned

Study design

Method	Online survey (CAWI)
Target group	Users of the online audio offers connected with the test campaign (in the last four weeks)
Sampling	N=520
Inventory	10 million AIs
Field time	Calendar week 23
Test customer	MEINFERNBUS FLIXBUS
Institute	TNS Infratest

Reporting
MeinFernbus FlixBus
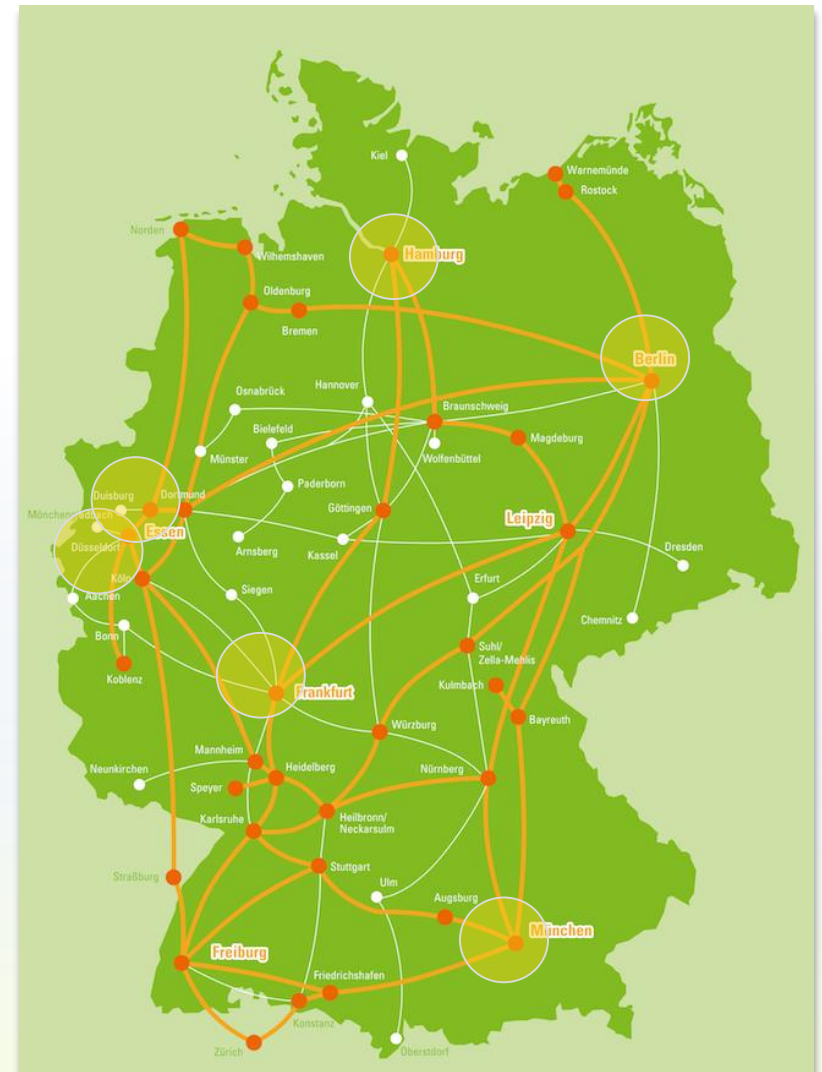
Advertising effectiveness study

Focus group audio BVDW

Campaign parameters

- **Calendar weeks 19-22** (four weeks in May)
- **10 million Als**
- **Platform-spanning flight:**
  - Laut.fm
  - Sport1.fm
  - detektor.fm
  - Silvacast
  - RauteMusik
  - SpotCom
  - Radionomy
  - Radio.de
  - Spotify
  - RMS more
- Regional trailer in six metropolitan areas (see map on the right)

Customer

MeinFernbus

- Acquisition MeinFernbus September 2014
- Announced flight: February 2015
- Creation of "Busfahrer" [bus driver]

MeinFernbus FlixBus

- Merger with FlixBus January 2015
- Review of creation
- Postponing of flight
  due to TV campaign FlixBus
- Flight: May 2015

Spot

- Motif "Herbert"
- as audio or audio/display
- with a regionalized trailer if required
- Talking bus driver
- Advantage of the merger and travel destinations
- Advertising media adapted to provider

One motif "Herbert"
Bus driver talks about merger

MEiNFERNBUS FLiXBUS
TRUST HERBERT!
Paris, Brussels, Amsterdam, Prague and many more
starting at **5€**
BOOK NOW!

Audio spot types				
Advertising media	CTA type	trailer type	advertising forms	spot length
Pre-stream regular nationwide	neutral/URL	none	audio	20
In-stream regular nationwide	neutral/URL	neutral	audio	30
In-stream regulär region B	neutral	region B	audio	30
In-stream regulär region HH	neutral	region HH	audio	30
In-stream regulär region M	neutral	region M	audio	30
In-stream regulär region RU	neutral	region RU	audio	30
In-stream regulär region RH	neutral	region RH	audio	30
In-stream regulär region RM	neutral	region RM	audio	30
In-stream Spotify nationwide	display	neutral	audio/display	30
In-stream Spotify region B	display	region B	audio/display	30
In-stream Spotify region HH	display	region HH	audio/display	30
In-stream Spotify region M	display	region M	audio/display	30
In-stream Spotify region RU	display	region RU	audio/display	30
In-stream Spotify region RH	display	region RH	audio/display	30
In-stream Spotify region RM	display	region RM	audio/display	30
Pre-stream radio.de nationwide	display	none	audio/display	20
Pre-stream radio.de region B	display	none	audio/display	20
Pre-stream radio.de region HH	display	none	audio/display	20
Pre-stream radio.de region M	display	none	audio/display	20
Pre-stream radio.de region RU	display	none	audio/display	20
Pre-stream radio.de region RH	display	none	audio/display	20
Pre-stream radio.de region RM	display	none	audio/display	20

Ad impressions in total

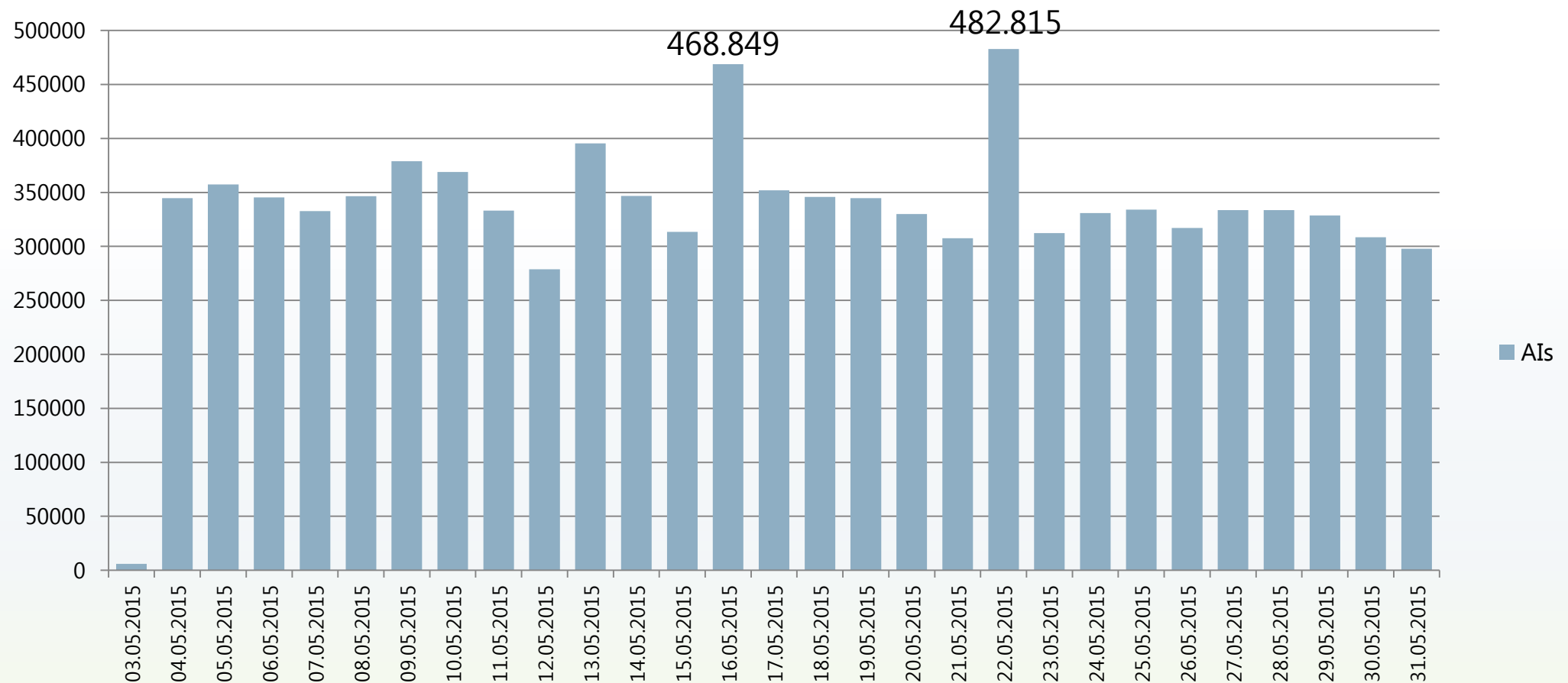**Platform-spanning slight underdelivery of -3.24%**
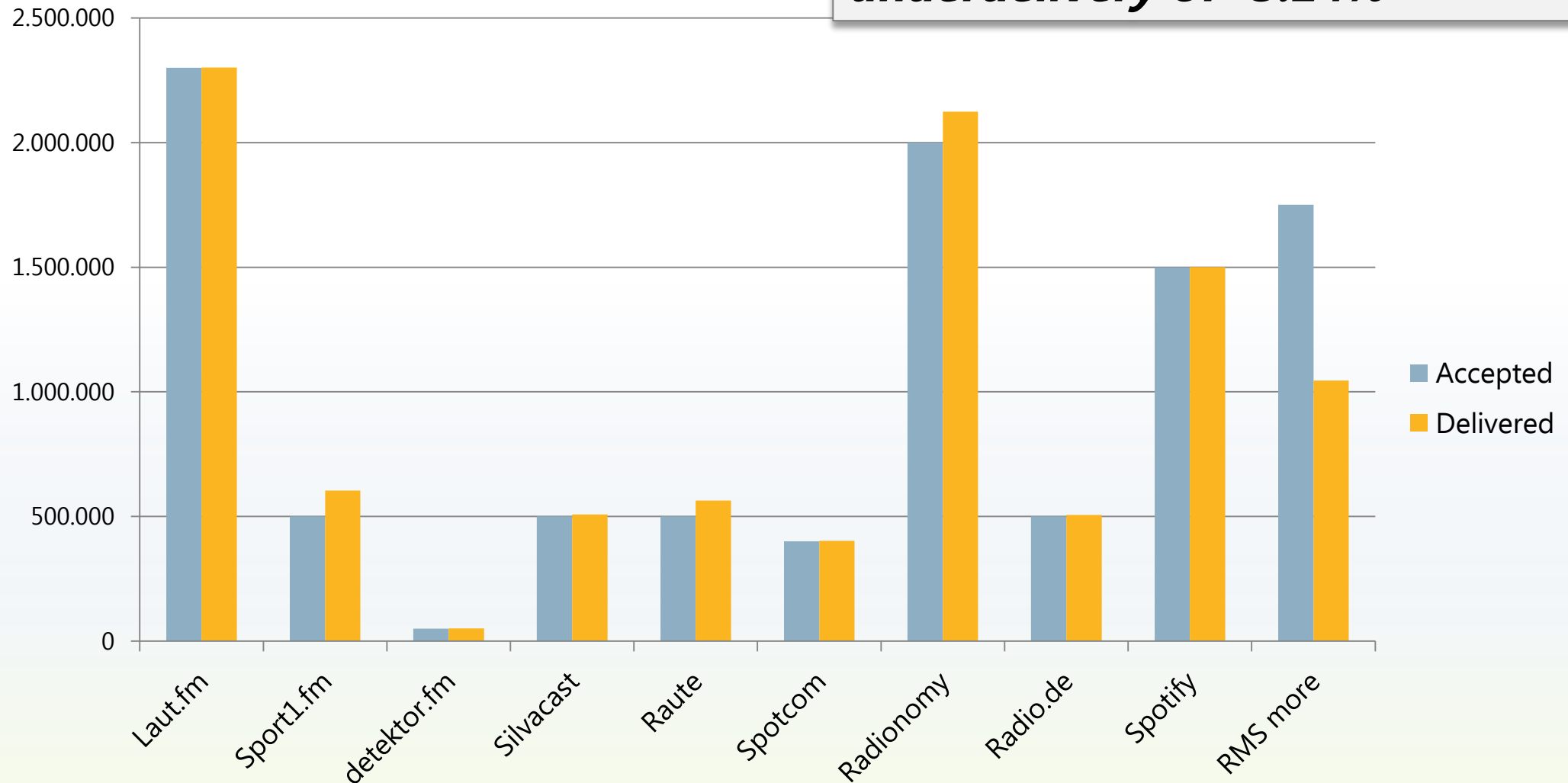
Total coverage - per day

AIs

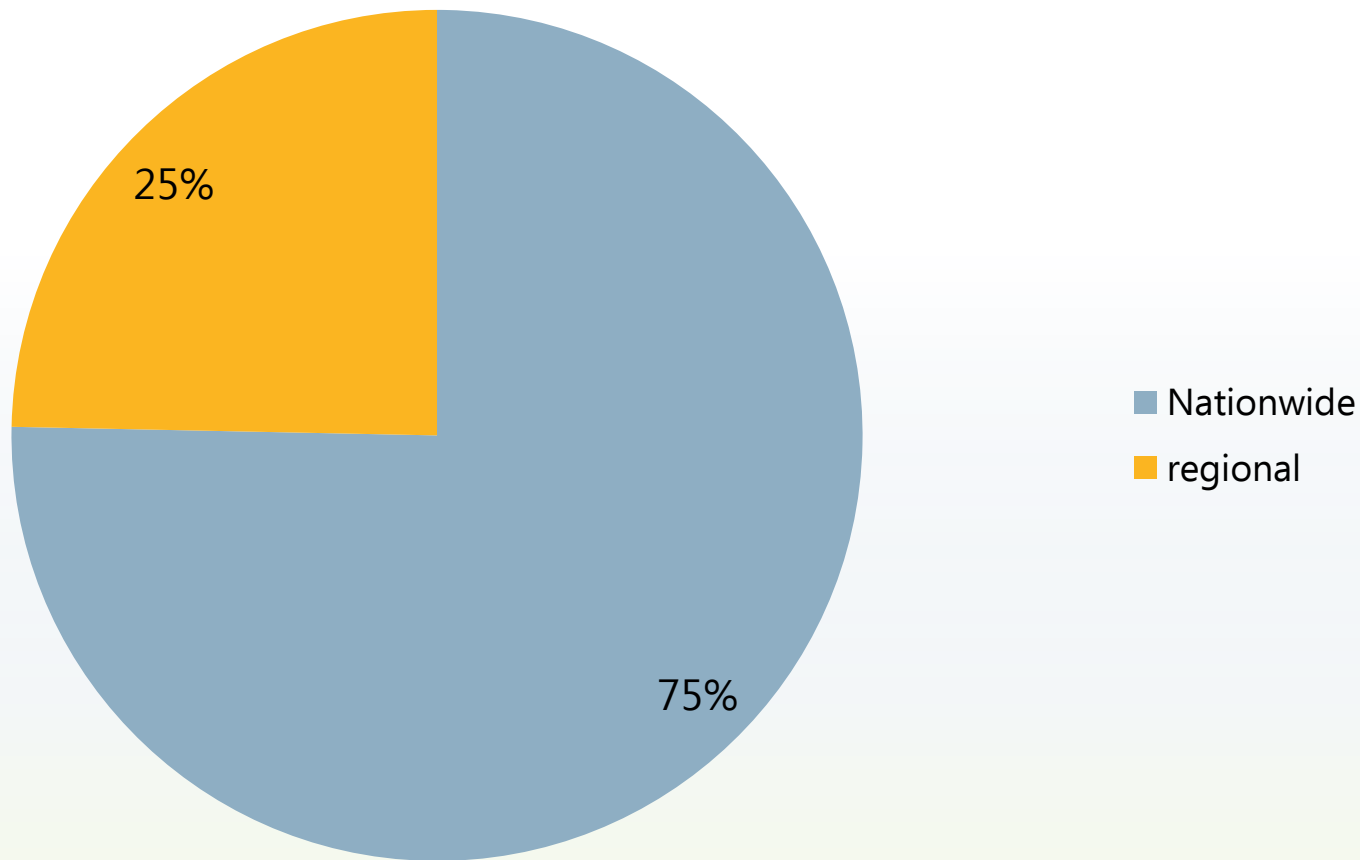Two peaks: last match days of the Bundesliga [German Soccer League]

Total coverage - federal vs. regional
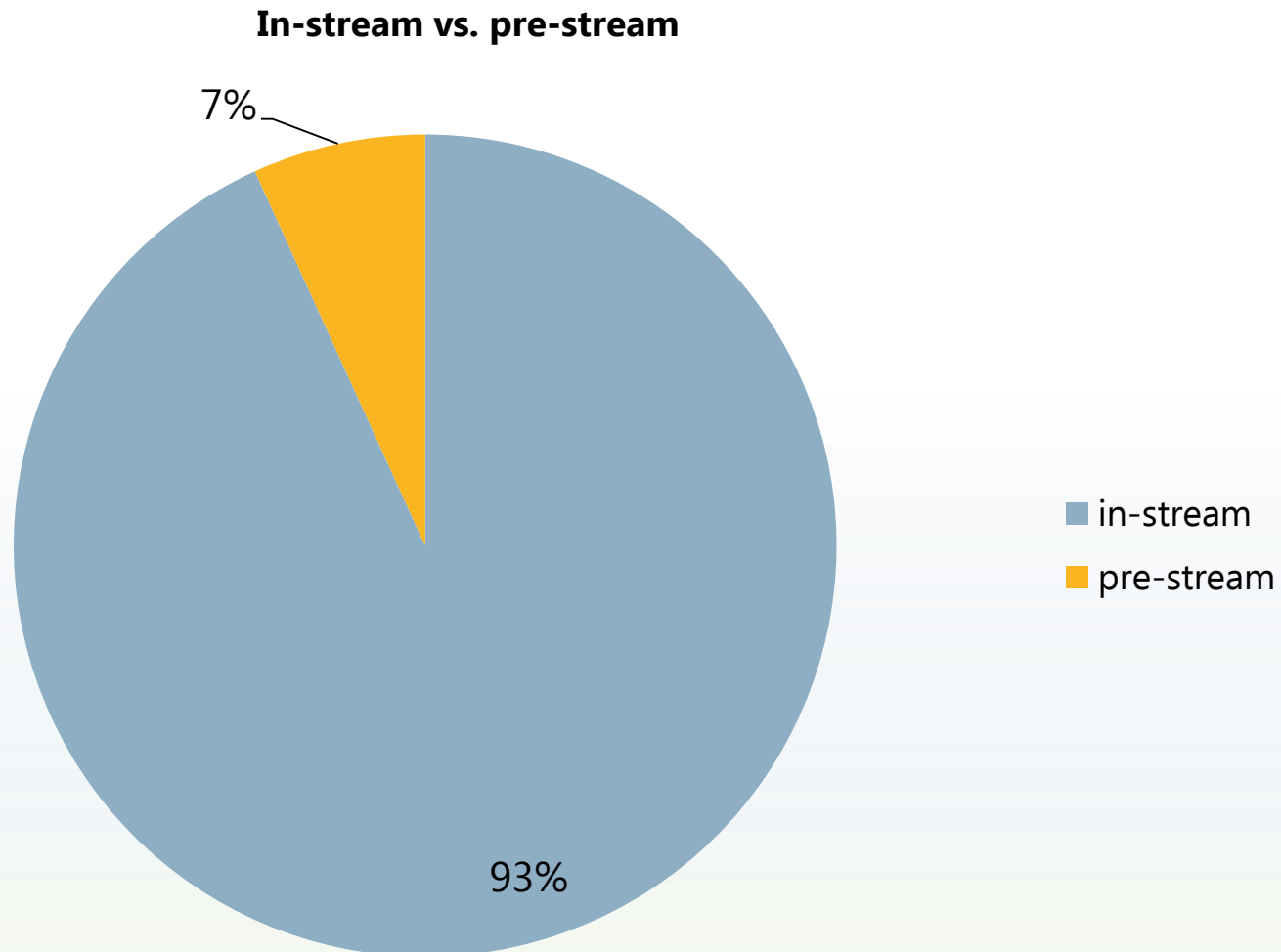
Every fourth spot with a regionalized trailer

Nationwide vs. regional

- 25%
- 75%

■ Nationwide
■ regional

Total coverage - in-stream vs. pre-stream

7% in pre-stream

In-stream vs. pre-stream

7%

93%

- in-stream
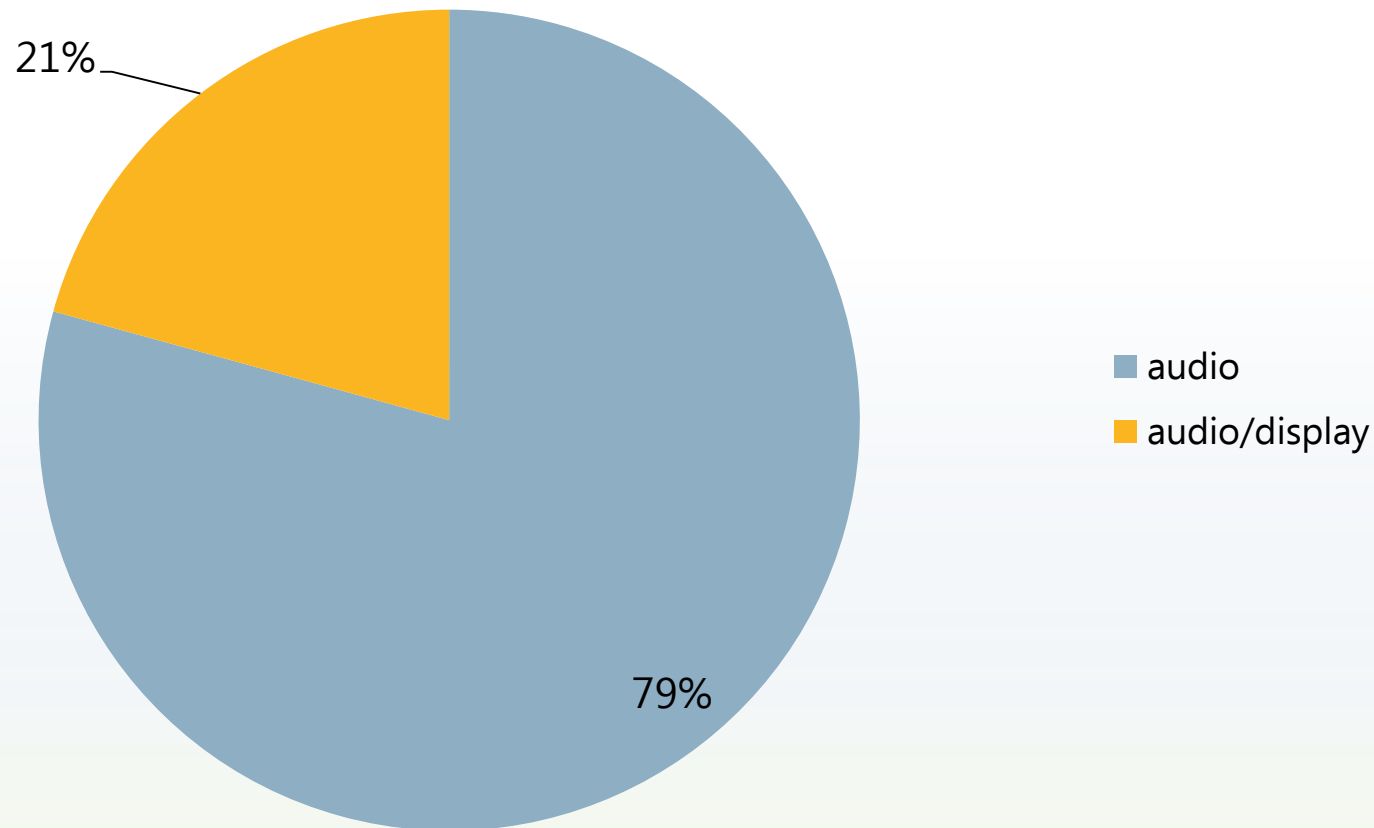- pre-stream

Total coverage - audio vs. audio display

audio vs. audio/display

Every 5th spot was audio & display

21%

79%

- audio
- audio/display

Results

Sociodemographics of respondents

Gender

43% ♀
57% ♂

Age

Age group	Percentage
14-19 years	13%
20-29 years	27%
30-39 years	20%
40-49 years	19%
50-59 years	16%
60-69 years	6%

Federal state

Federal state	Percentage
Bremen, Hamburg, Lower Saxony, Schleswig-Holstein	18%
North Rhine-Westphalia	21%
Hesse, Rhineland-Palatinate, Saarland	14%
Baden-Württemberg	11%
Bavaria	12%
Berlin	7%
Brandenburg, Mecklenburg-West Pomerania, Saxony-Anhalt	8%
Saxony, Thuringia	9%

Education

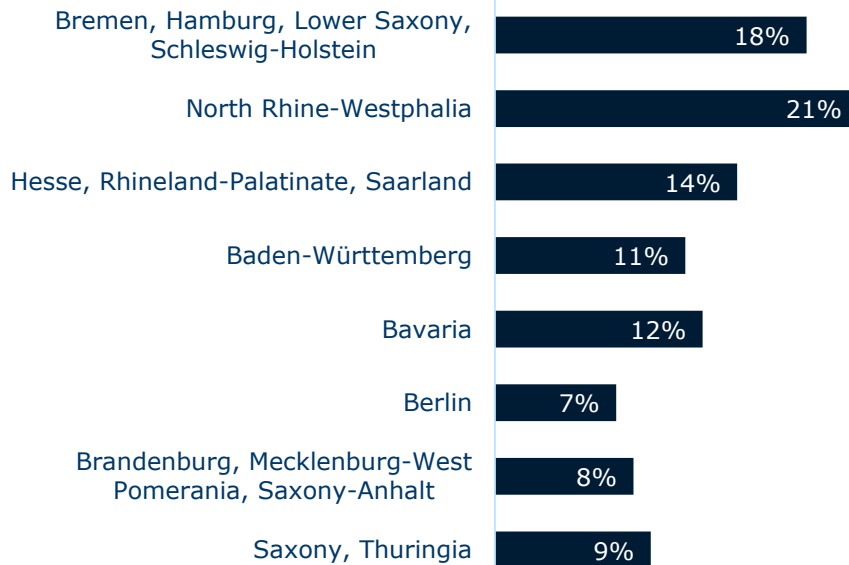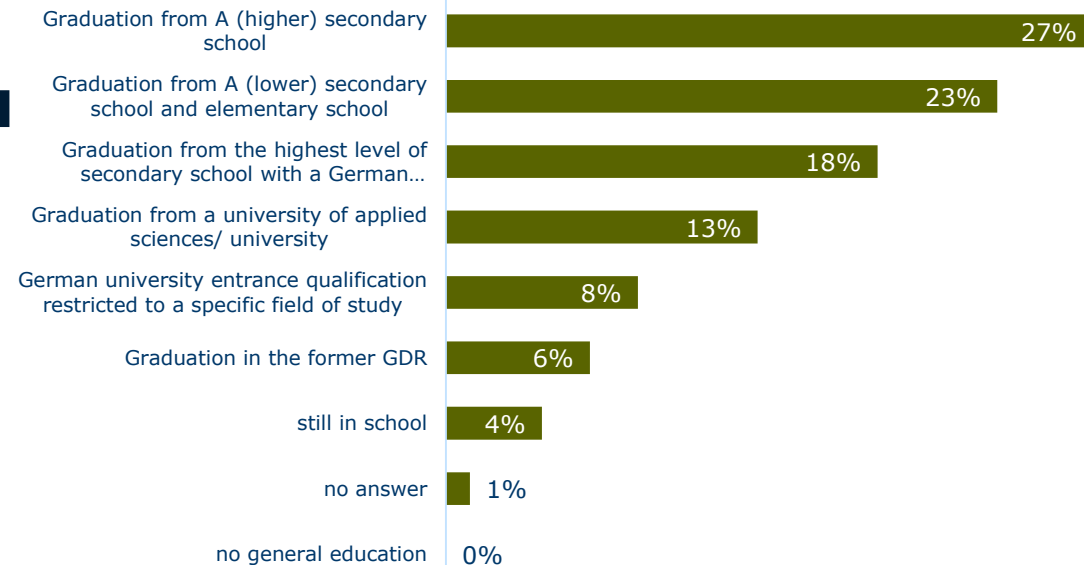| Education	Percentage
Graduation from A (higher) secondary school	27%
Graduation from A (lower) secondary school and elementary school	23%
Graduation from the highest level of secondary school with a German…	18%
Graduation from a university of applied sciences/ university	13%
German university entrance qualification restricted to a specific field of study	8%
Graduation in the former GDR	6%
still in school	4%
no answer	1%
no general education	0%

Almost every fourth respondent heard the spot in the last four weeks.

Recognition advertising spot all respondents

- Yes
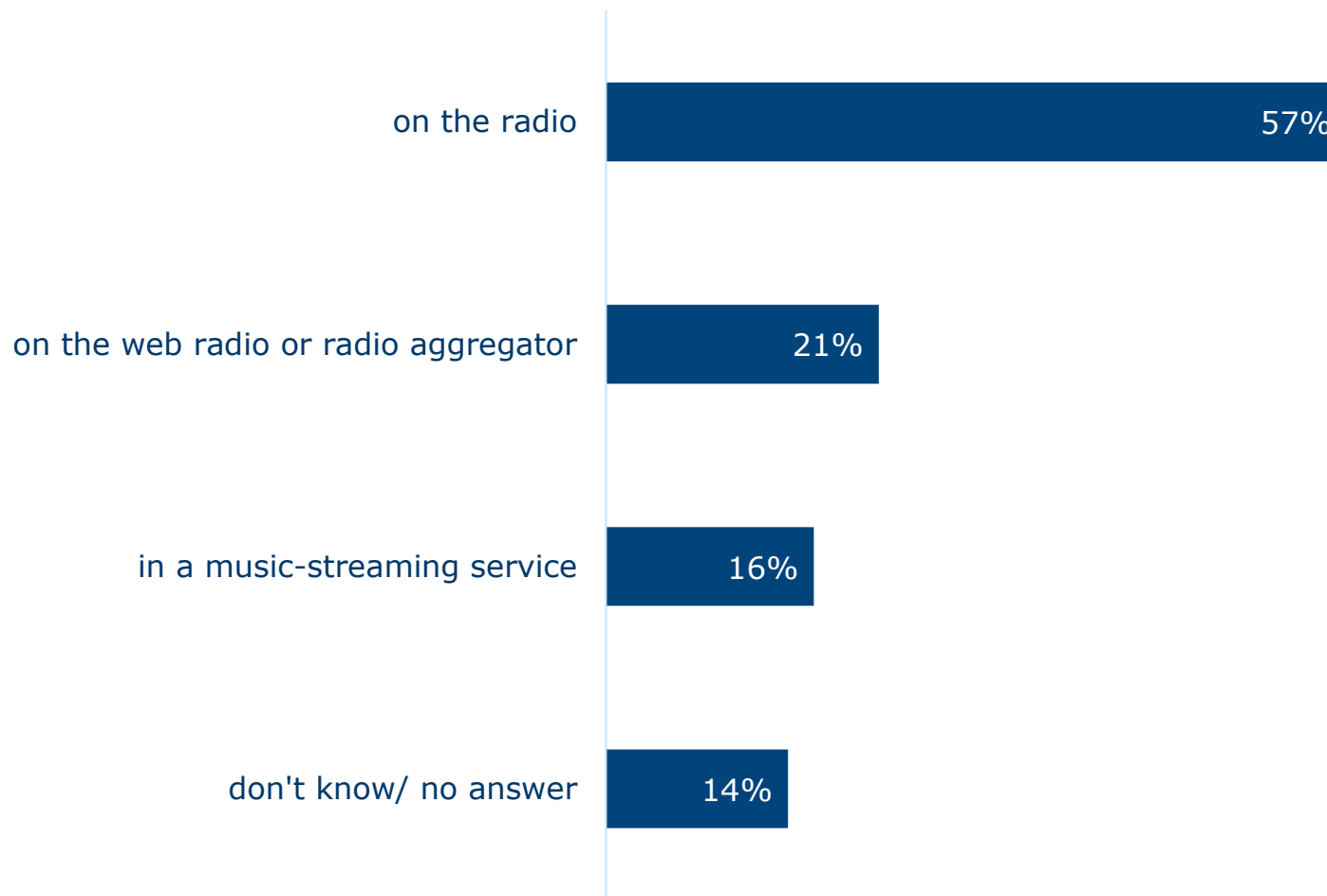- No
- Don't know/no answer

21%

9%

70%
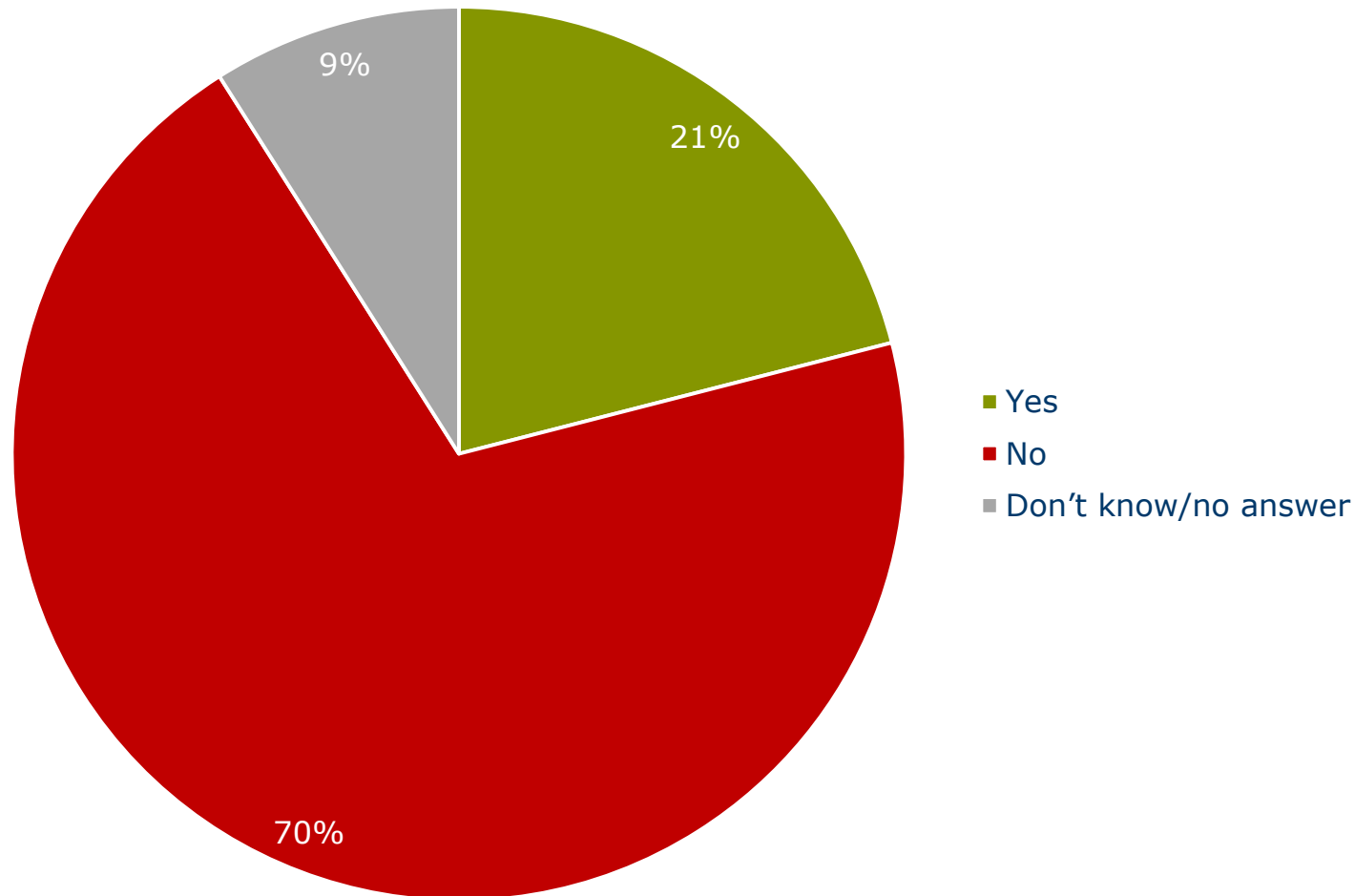
Question: Have you heard this spot in the last four weeks?
Basis: N=520

Although the spot was not played on the radio, over half of the respondents stated to have heard this spot.
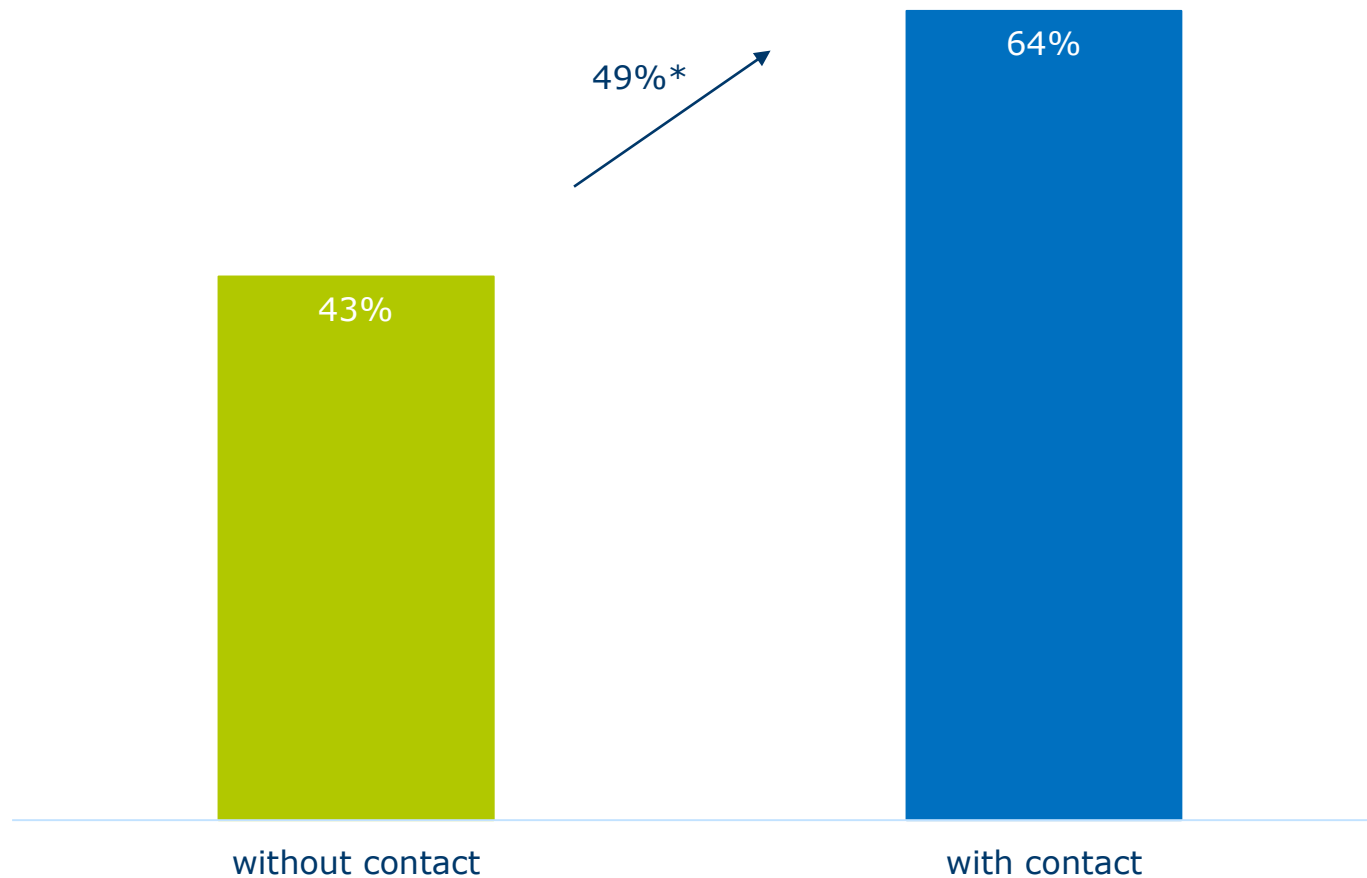
Recognition spot advertising media

Category	Percentage
on the radio	57%
on the web radio or radio aggregator	21%
in a music-streaming service	16%
don't know/ no answer	14%

Question: Where have you heard this spot?
Basis: with contact n=111

Primarily younger respondents came in contact with the spot.

Recognition spot according to gender/age

	male	female		14-29 years	30-49 years	50-69 years
without contact	69%	71%		61%	76%	76%
with contact	22%	20%		30%	17%	14%

■ without contact ■ with contact   ■ without contact ■ with contact
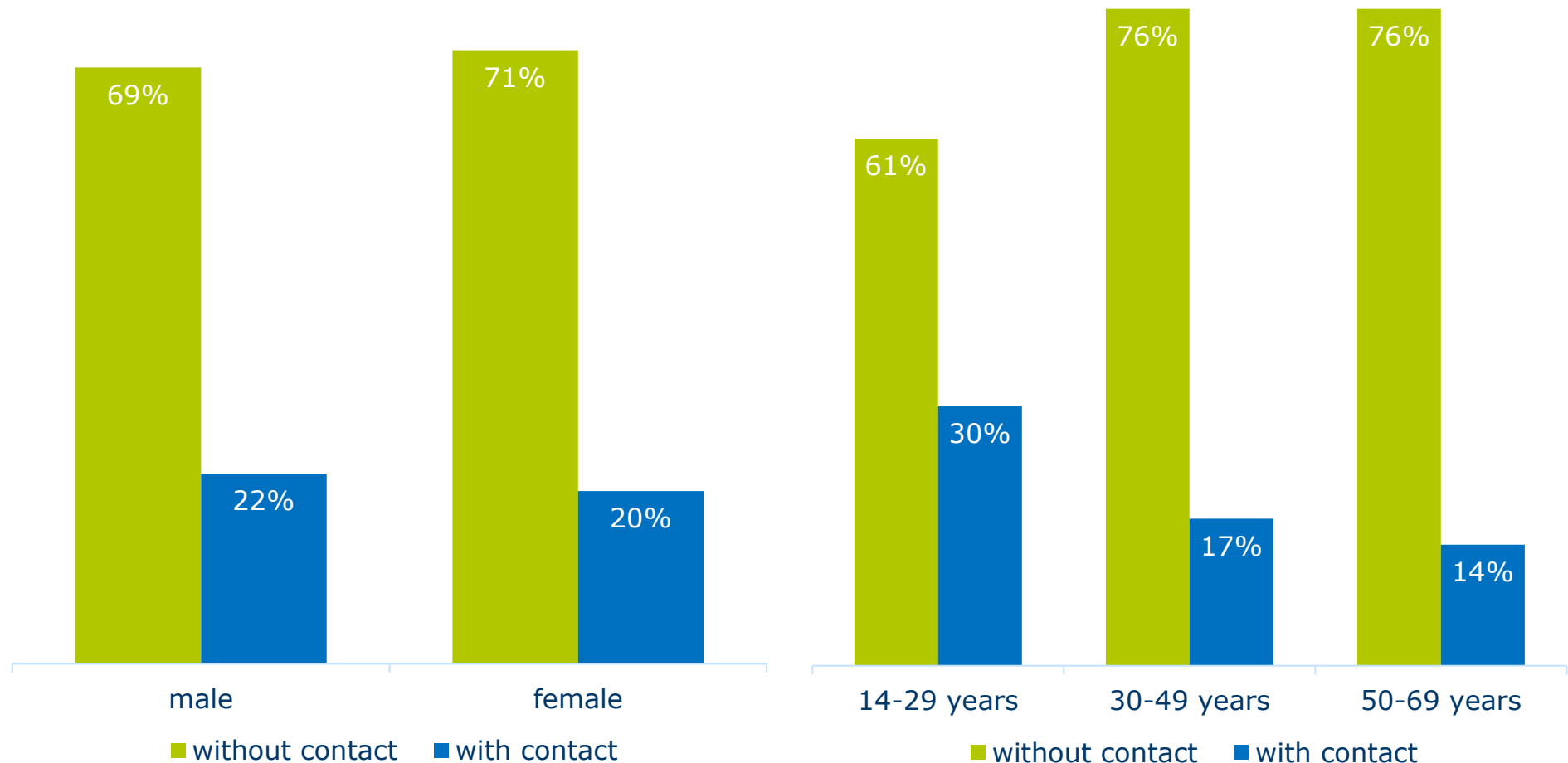
Question: Have you heard this spot in the last four weeks?
Basis: without contact n=365, with contact n=111

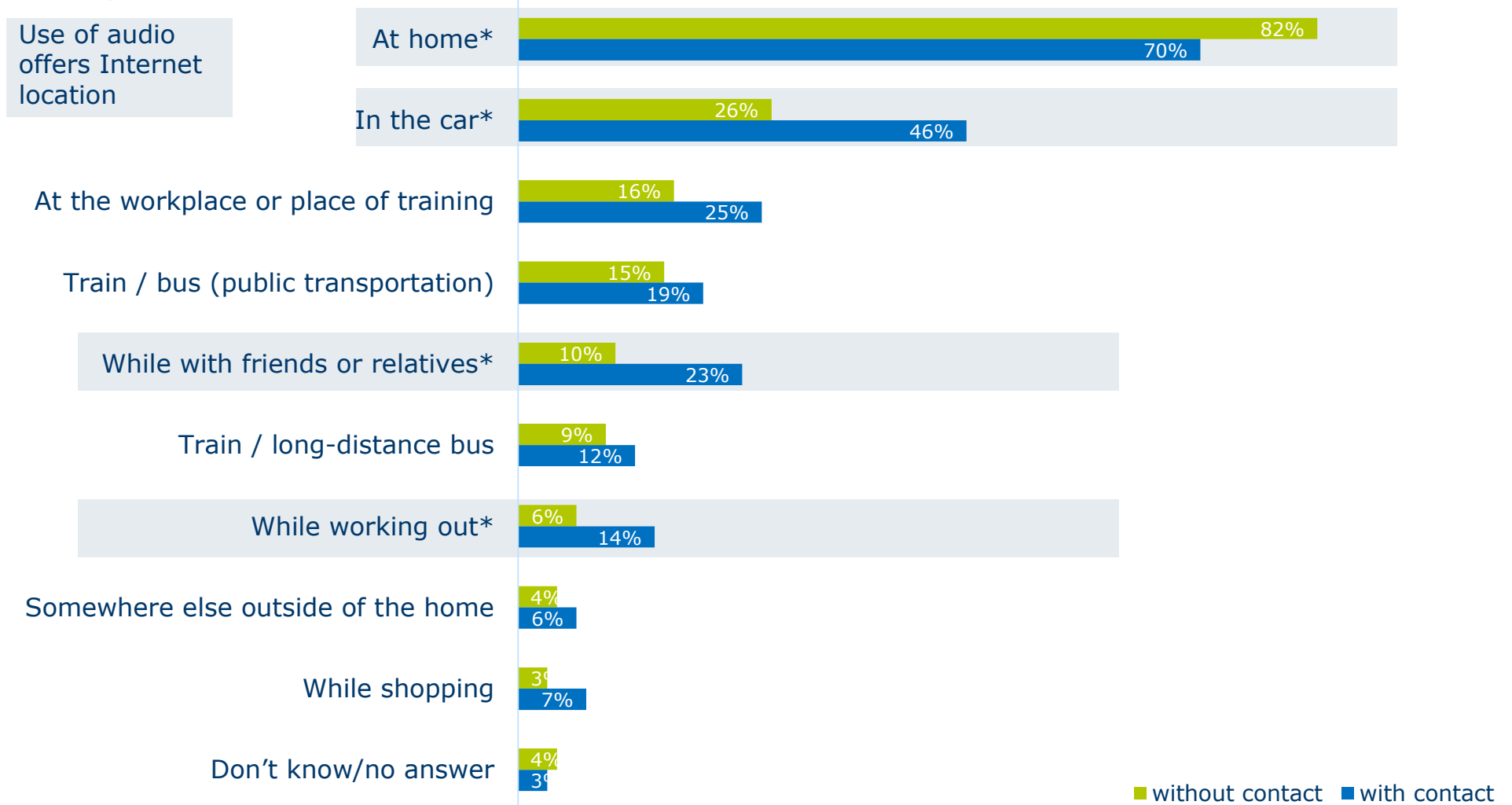# Respondents with contact to the spot frequently listen to audio offers on the Internet.

Use of audio offers Internet time of day

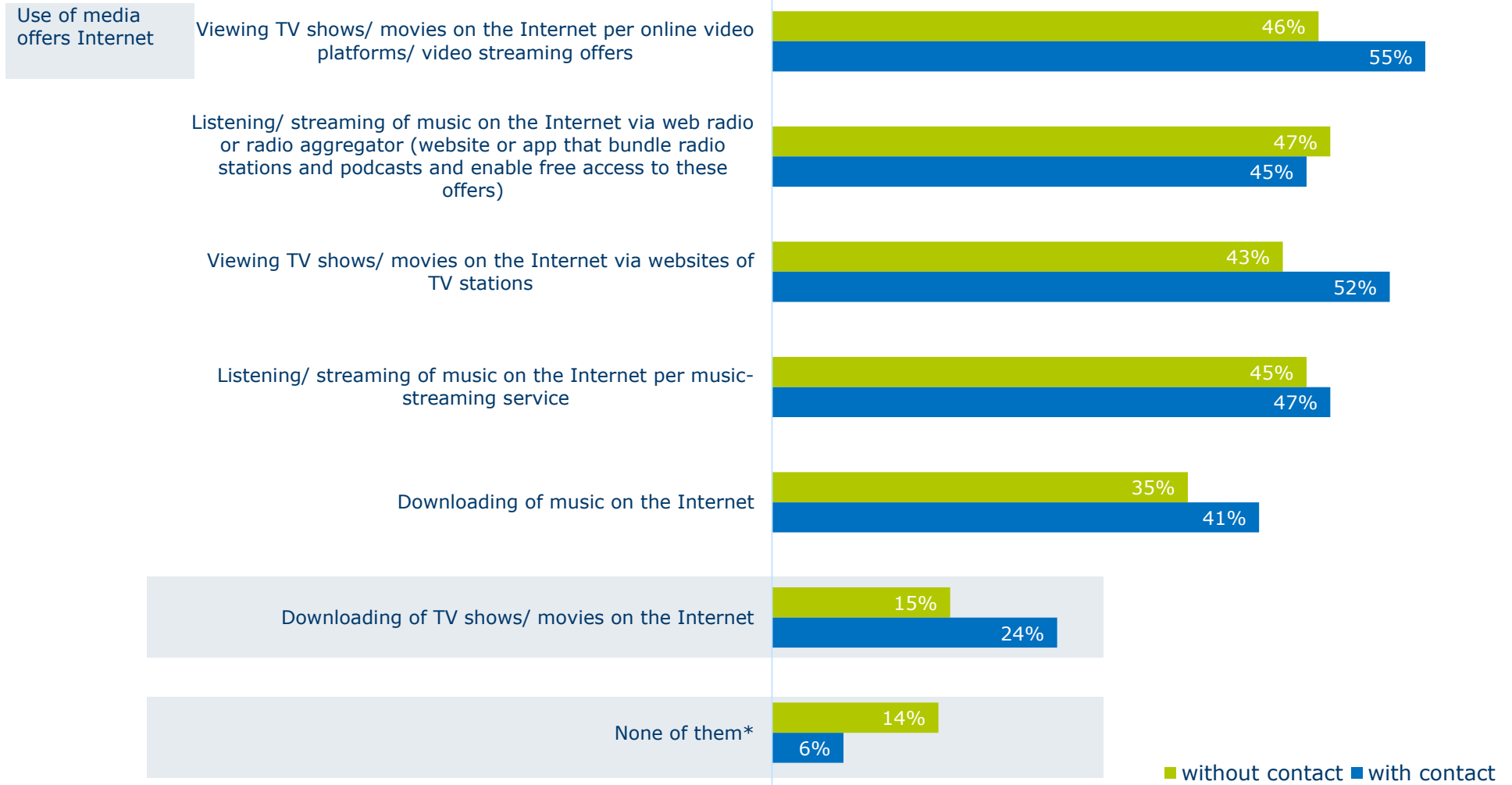| Time of day	without contact	with contact
Early in the morning	31%	41%
Early in the evening	26%	35%
Late in the afternoon	31%	35%
Late in the morning*	14%	27%
Late in the evening	24%	24%
In the morning in bed after I wake up*	10%	23%
During the morning commute	24%	22%
Early in the afternoon	18%	20%
During lunch*	9%	20%
During the (evening) commute	9%	18%
In bed, before I go to sleep	10%	16%
During dinner	7%	12%
Don't know/no answer	3%	3%
Never *	5%	

■ without contact ■ with contact

Question: When do you usually listen to audio offers on the Internet (web radio, aggregators, music-streaming services)?
Basis: without contact n=365, with contact n=111
*p < .05

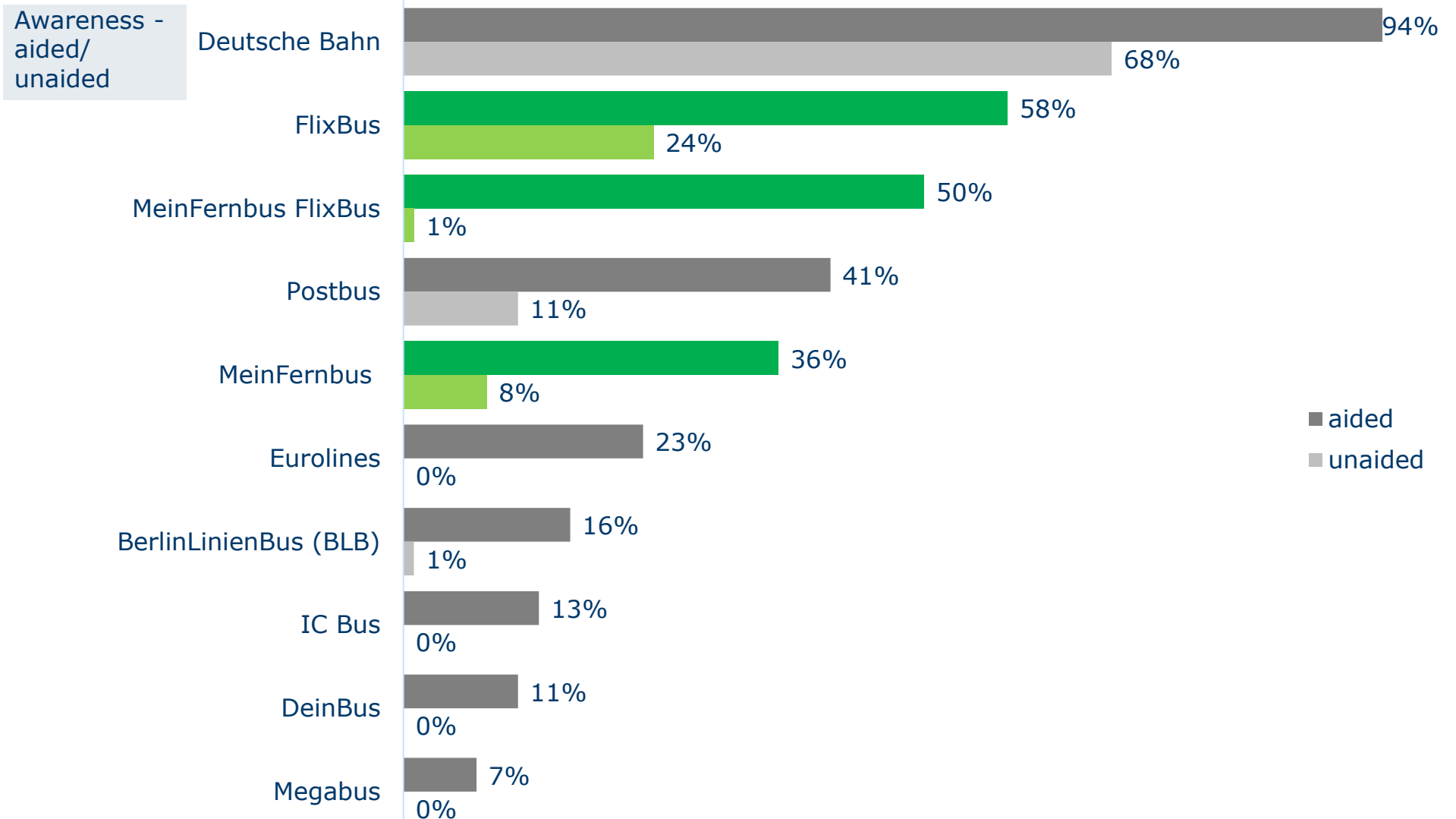# Respondents with contact use more media offers on the Internet.

Use of media offers Internet

Viewing TV shows/ movies on the Internet per online video platforms/ video streaming offers
- without contact: 46%
- with contact: 55%

Listening/ streaming of music on the Internet via web radio or radio aggregator (website or app that bundle radio stations and podcasts and enable free access to these offers)
- without contact: 47%
- with contact: 45%

Viewing TV shows/ movies on the Internet via websites of TV stations
- without contact: 43%
- with contact: 52%

Listening/ streaming of music on the Internet per music-streaming service
- without contact: 45%
- with contact: 47%

Downloading of music on the Internet
- without contact: 35%
- with contact: 41%

Downloading of TV shows/ movies on the Internet
- without contact: 15%
- with contact: 24%

None of them*
- without contact: 14%
- with contact: 6%

■ without contact ■ with contact

Question: Which of the following media offers on the Internet do you use on a regular basis?
Basis: without contact n=365, with contact n=111
*p < .05

Half of all respondents know the merged brand MeinFernbus FlixBus.

Awareness - aided/ unaided

Provider	aided	unaided
Deutsche Bahn	94%	68%
FlixBus	58%	24%
MeinFernbus FlixBus	50%	1%
Postbus	41%	11%
MeinFernbus	36%	8%
Eurolines	23%	0%
BerlinLinienBus (BLB)	16%	1%
IC Bus	13%	0%
DeinBus	11%	0%
Megabus	7%	0%

■ aided
■ unaided

Question: Which providers you can choose from for travel within Germany do you know at least by name?
Basis: N=520
*p < .05

Significantly more respondents with contact know of the merger.

Knowledge of the merger
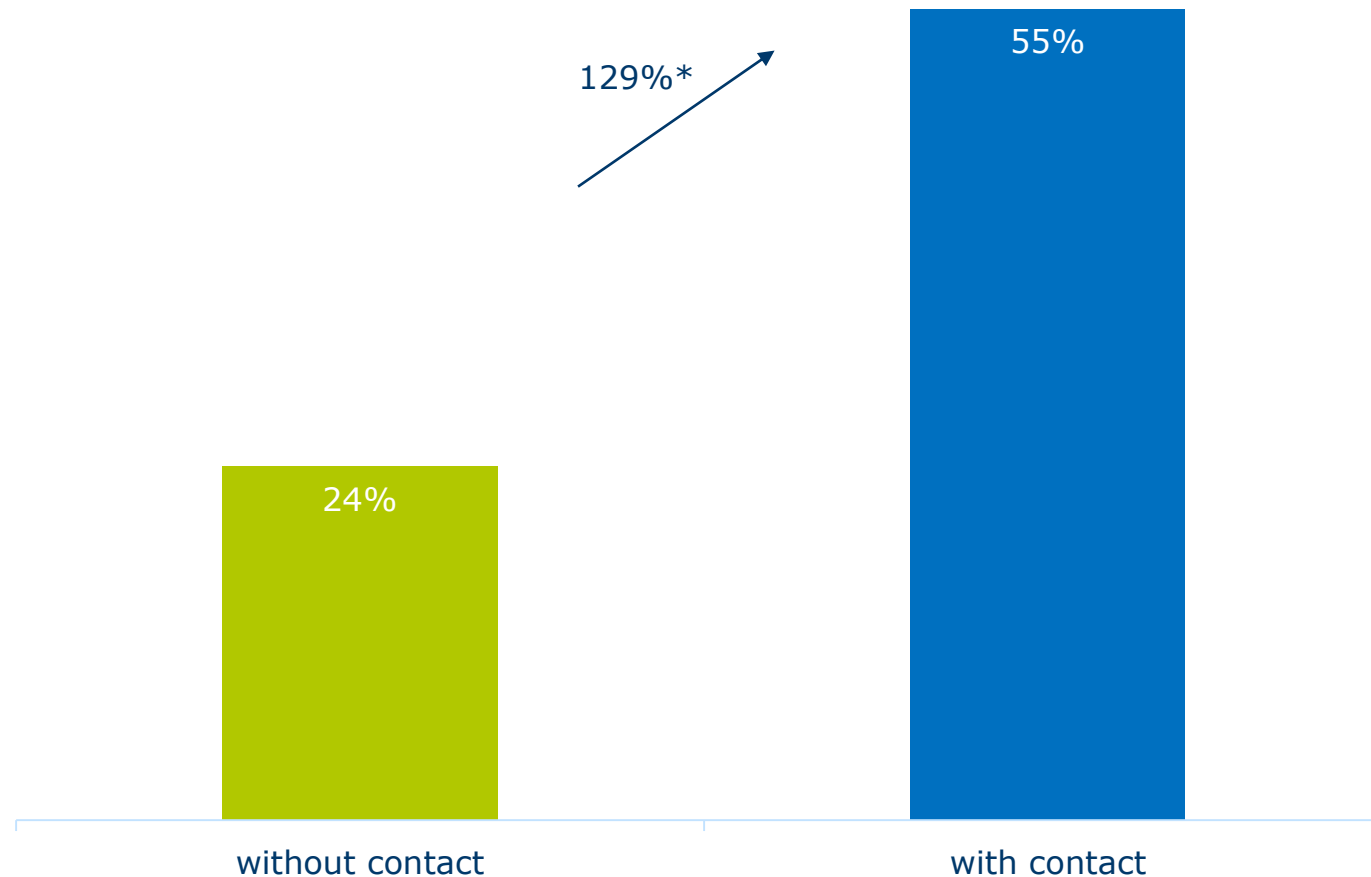
129%*

55%

24%

without contact

with contact

The ones with contact to the spot also agree that the merger as a whole results in advantages for the customer.

Advantages of the merger

47%*

63%

43%

without contact

with contact

Across all three brands FlixBus is mostly recalled in an unaided manner.

Unaided advertising recall

-23%*

47%

36%

100%*

22%

without contact

with contact

600%*

11%

7%

1%

0%   1%

MeinFernbus   FlixBus   MeinFernbus FlixBus   Deutsche Bahn
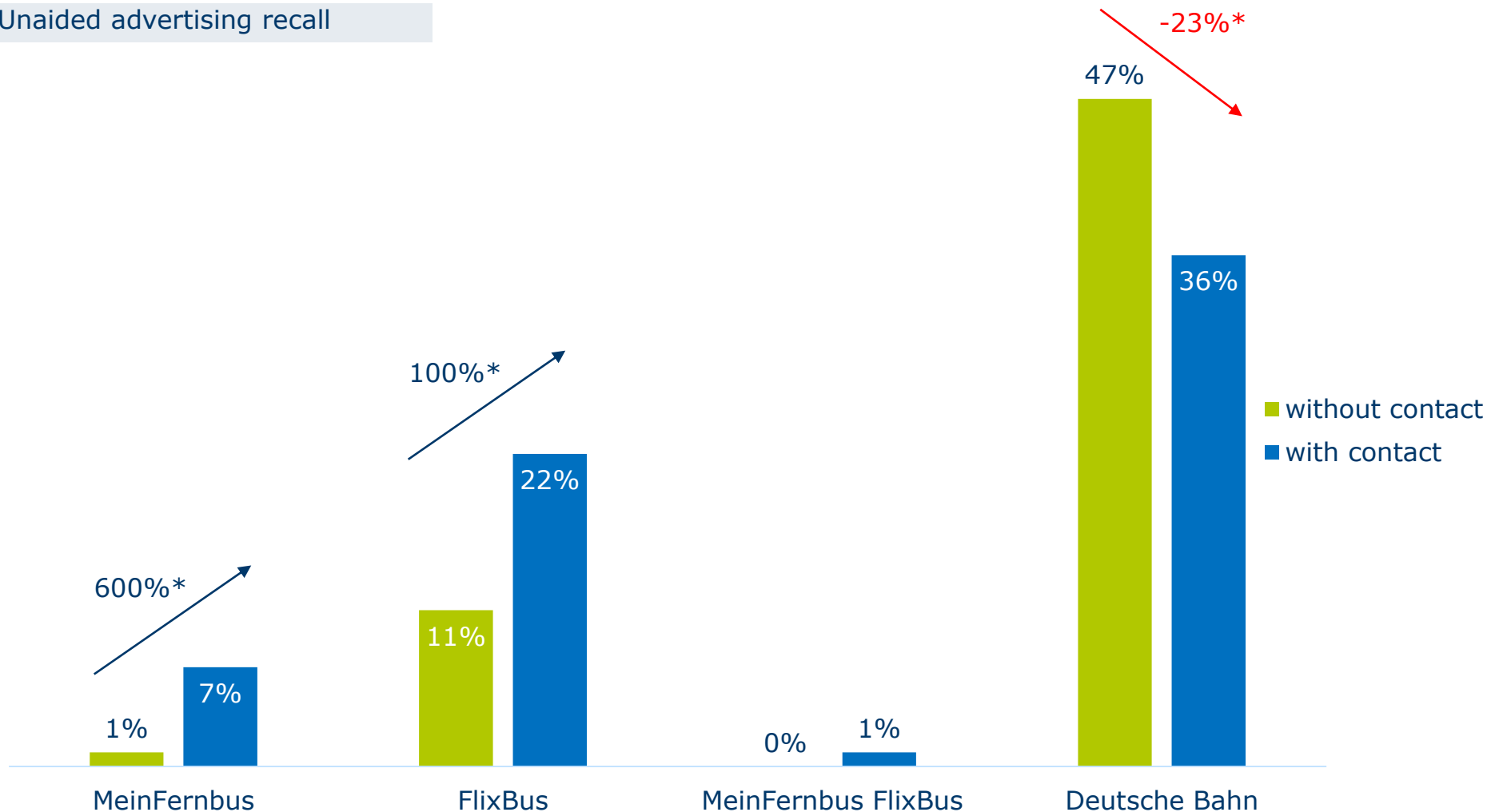
Question: And for which providers of national passenger transportation within Germany have you lately heard, seen or read any advertising?
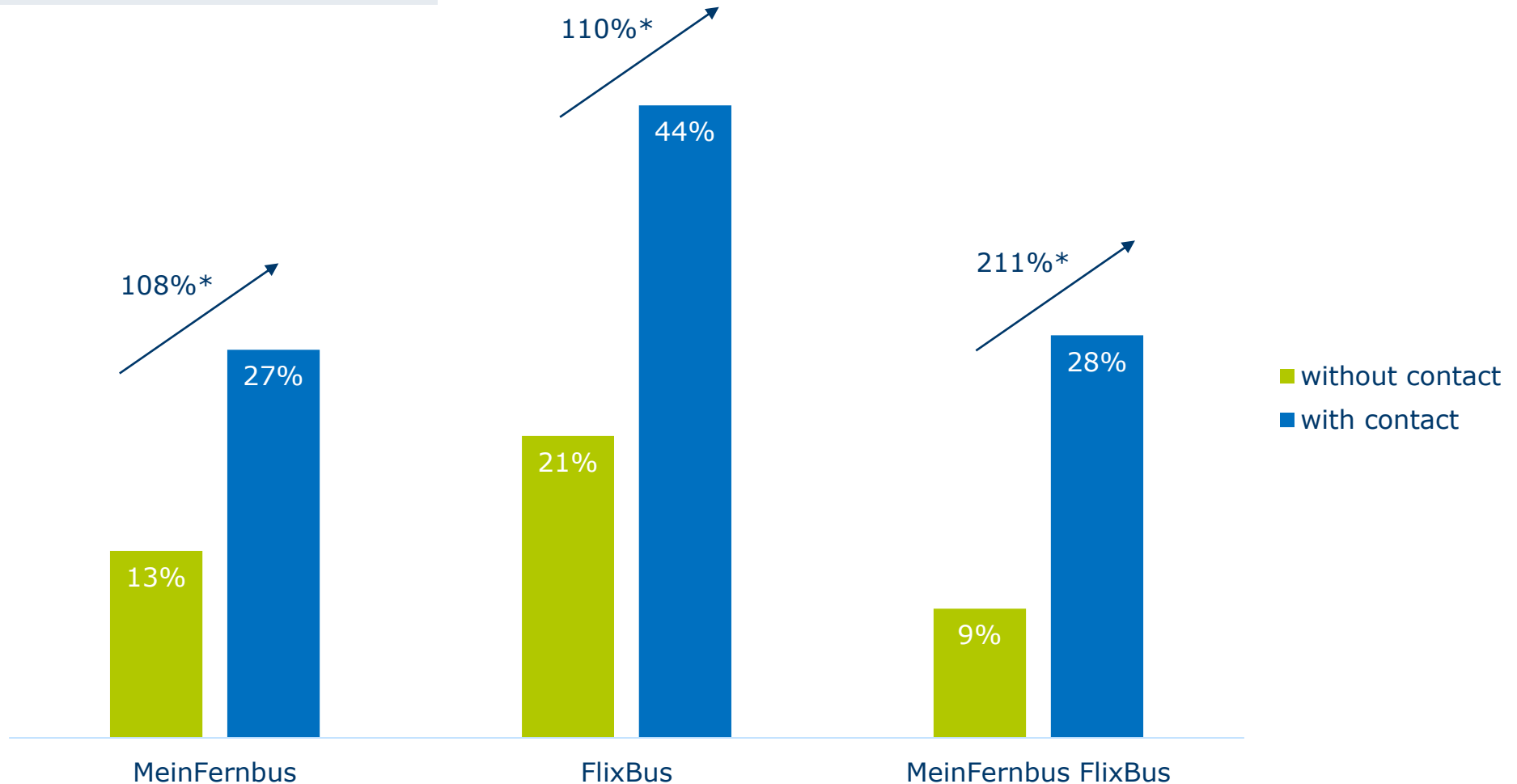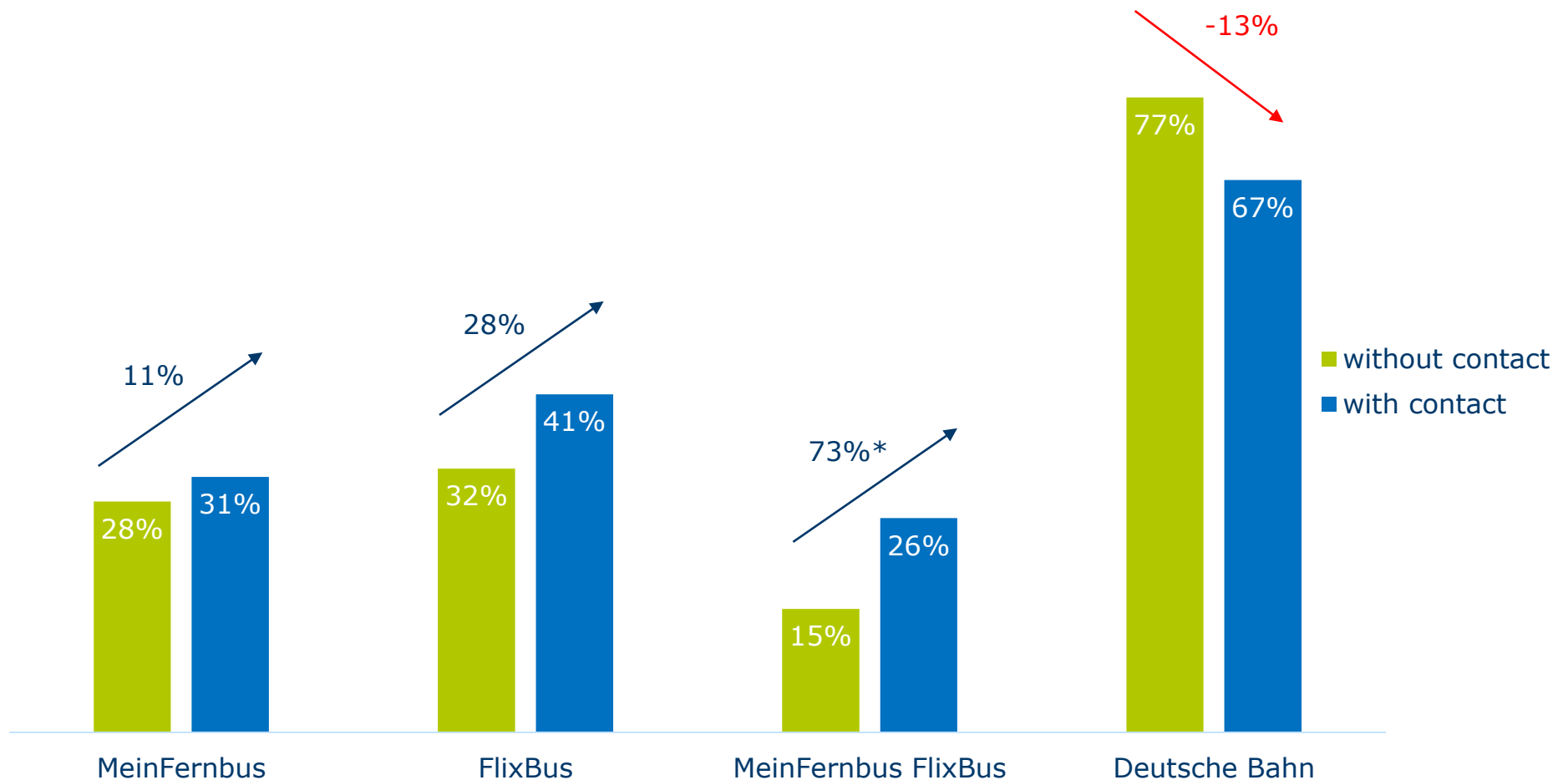Basis: without contact n=365, with contact n=111
*p < .05

At least one-fourth of all respondents with contact to the spot can imagine to use of the brands from the portfolio.
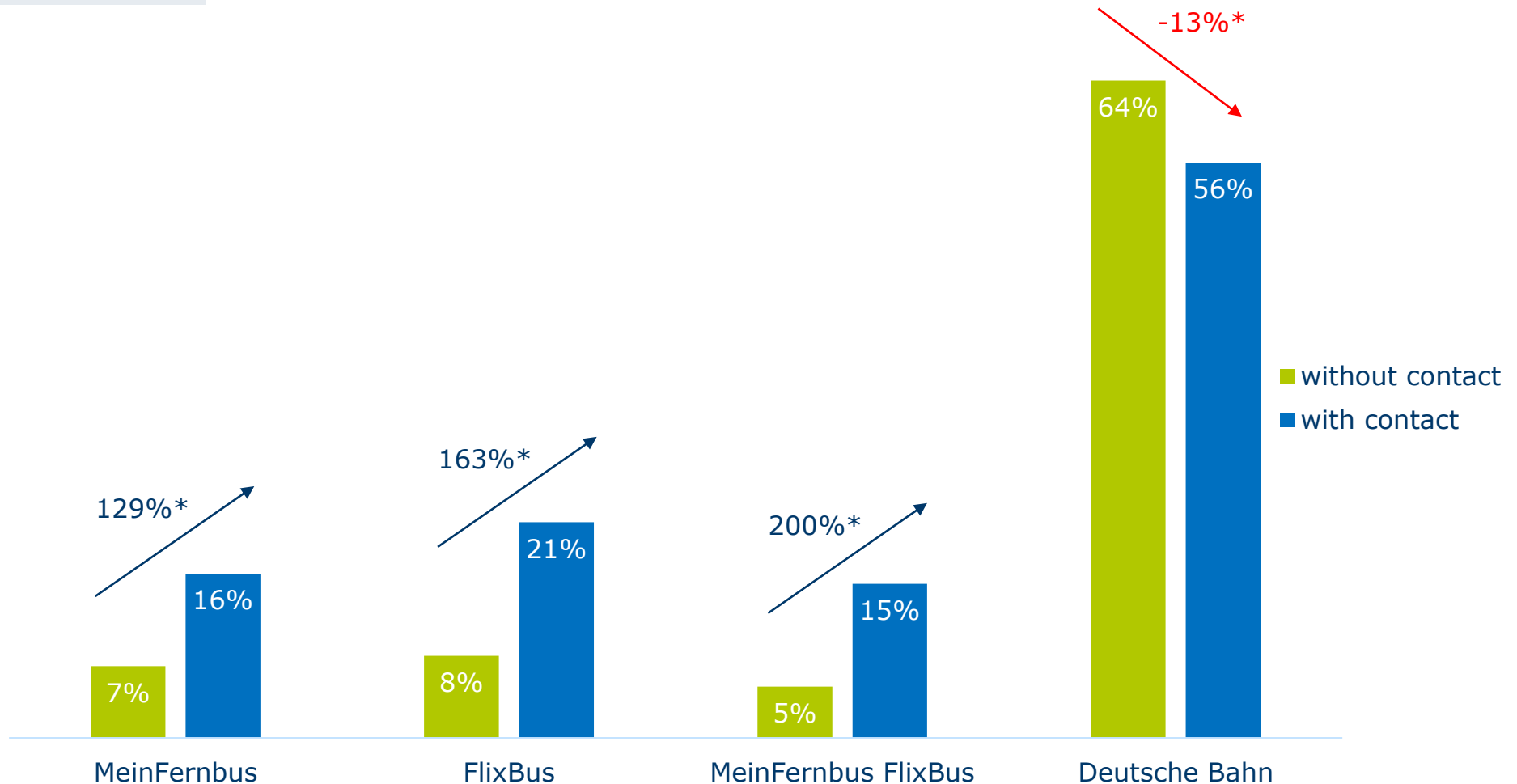
Relevant set

-13%

77%
67%

28%
11%
31%
28%

FlixBus
28%
41%
32%

MeinFernbus FlixBus
73%*
26%
15%

without contact
with contact

MeinFernbus   FlixBus   MeinFernbus FlixBus   Deutsche Bahn

Respondents with contact to the spot use one of the three brands significantly more often.

Use

without contact
with contact

MeinFernbus — 7% / 16% — 129%*
FlixBus — 8% / 21% — 163%*
MeinFernbus FlixBus — 5% / 15% — 200%*
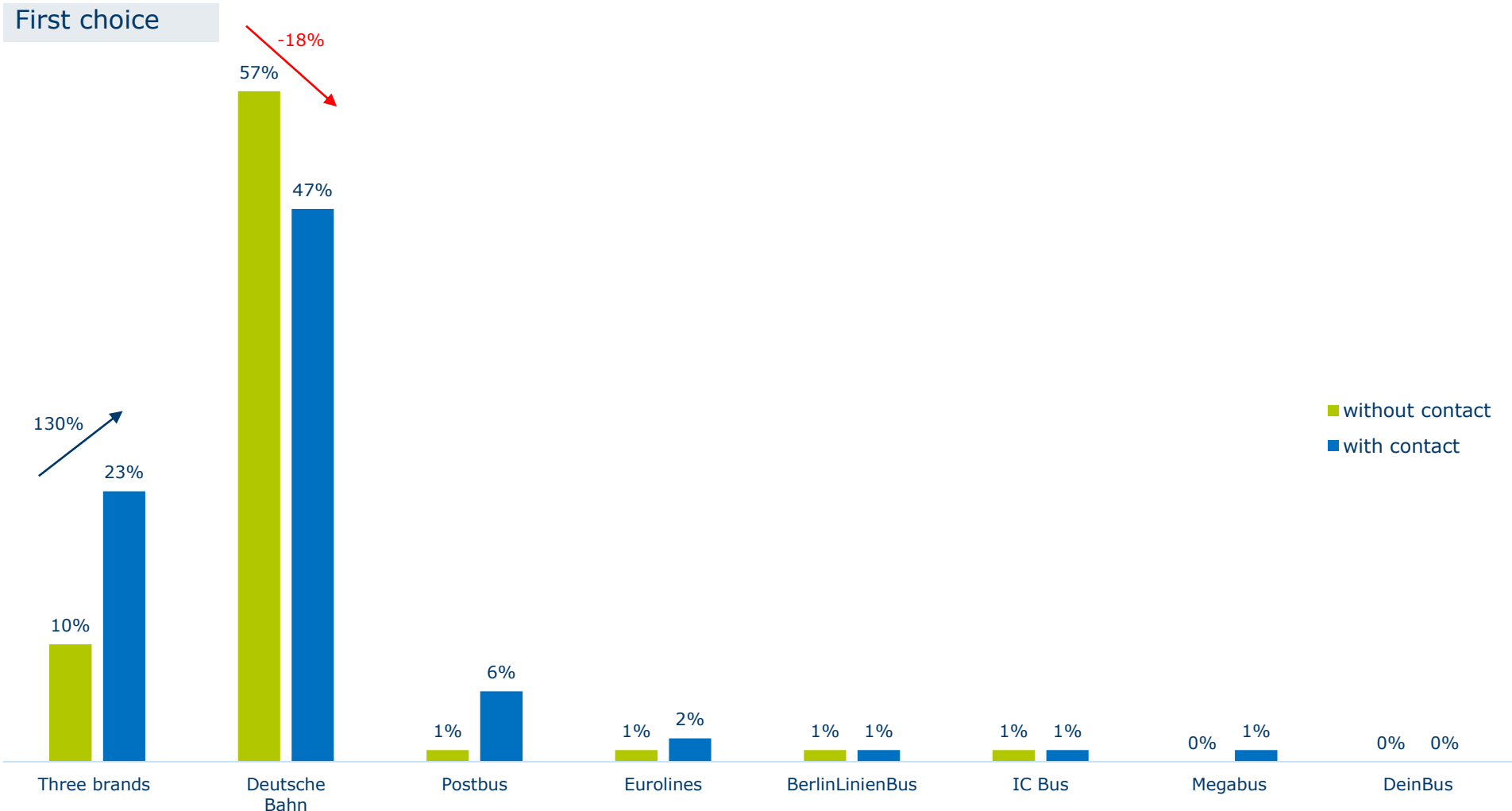Deutsche Bahn — 64% / 56% — -13%*

Question: Here are some providers of nationwide passenger transportation in Germany. Now please highlight all providers that you at least use occasionally.
Basis: without contact n=365, with contact n=111
*p < .05

For every fourth respondent with contact to the spot, one of the three brands from the portfolio would be the top choice.

First choice

-18%

57%

47%

130%

23%

10%

■ without contact
■ with contact

6%

1%

1% 2%

1% 1%

1% 1%

0% 1%

0% 0%

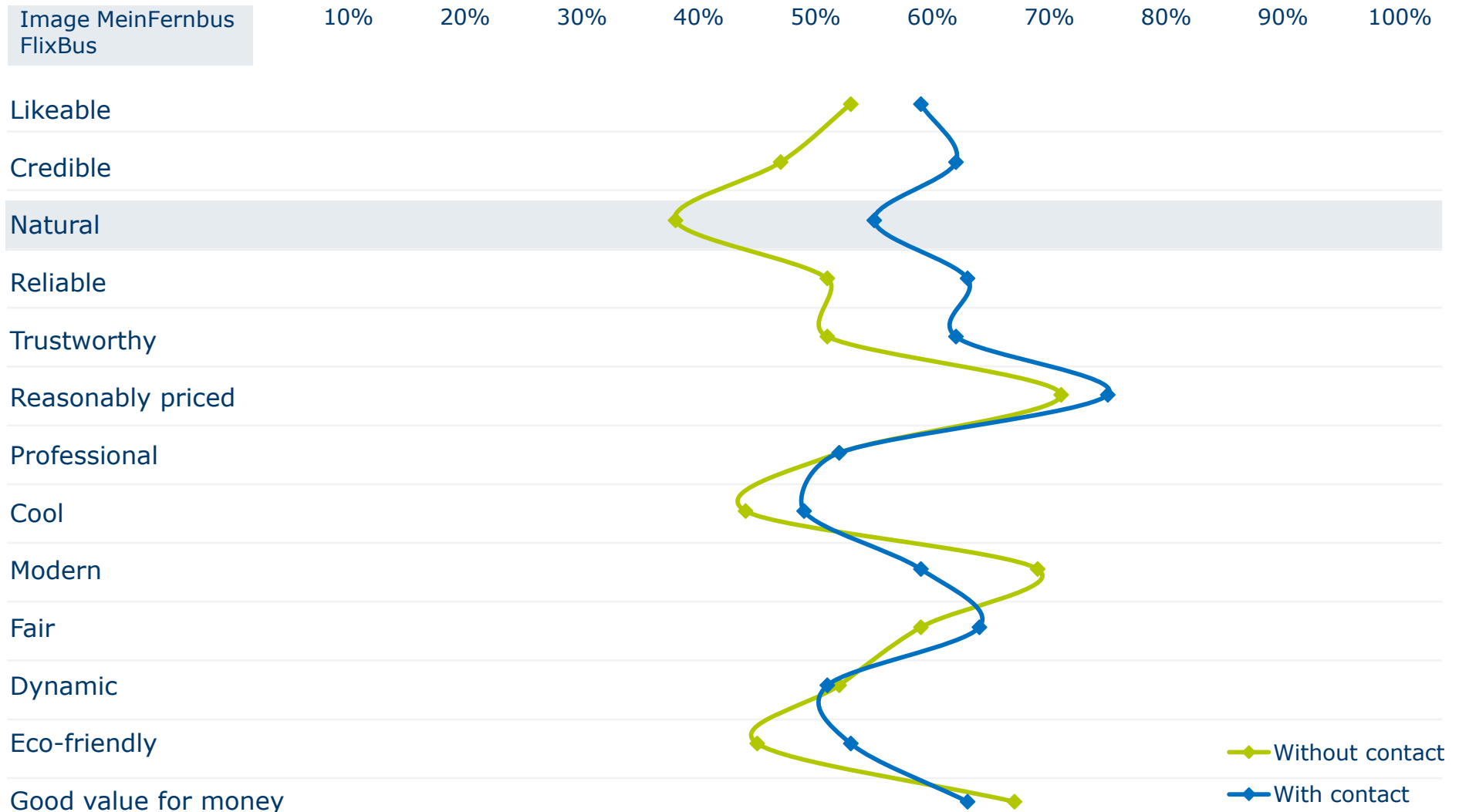| Three brands | Deutsche Bahn | Postbus | Eurolines | BerlinLinienBus | IC Bus | Megabus | DeinBus |

Question: Here are some providers of nationwide passenger transportation in Germany. Now please highlight a provider that would be your top choice in this sector.
Basis: without contact n=365, with contact n=111; sum of all three brands
*p < .05

Respondents with contact to the spot evaluate MeinFernbus FlixBus more positively than respondents without contact.

Image MeinFernbus FlixBus

| | 10% | 20% | 30% | 40% | 50% | 60% | 70% | 80% | 90% | 100% |

- Likeable
- Credible
- Natural
- Reliable
- Trustworthy
- Reasonably priced
- Professional
- Cool
- Modern
- Fair
- Dynamic
- Eco-friendly
- Good value for money

Without contact
With contact

Question: Here are some qualities with which providers of nationwide passenger transportation such as MeinFernbus FlixBus could be described. Please highlight respectively to which extent the quality applies to MeinFernbus FlixBus.
Basis: without contact n=121, with contact n=53
Six-level scale, depiction of top 2 values; *p < .05

Lessons learned
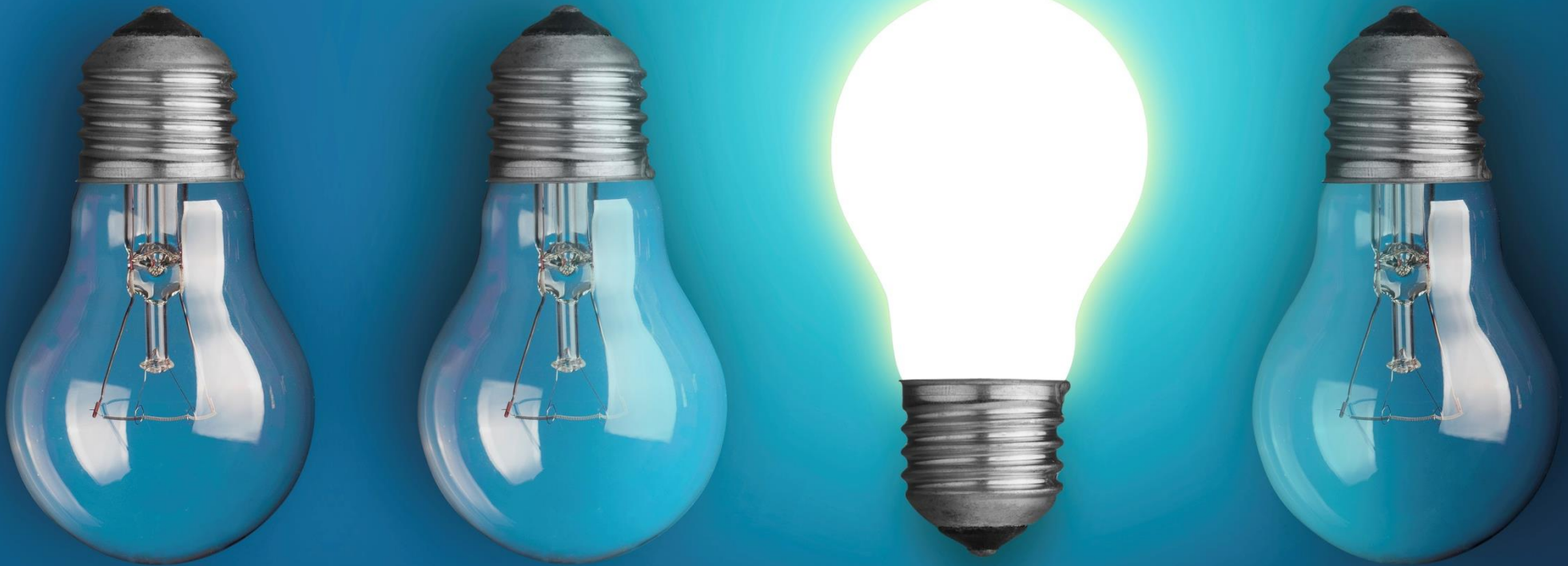
Overview of KPIs

Unaided awareness	↗
Aided awareness	↗
Unaided advertising recall	↑
Aided advertising recall	↑
Relevant set	↗
Use	↑
Top choice	↗

Lessons learned

Communication goal - creating awareness for merger and advantages - was achieved

Good target group fit allows for advertising effect on differentlevels

Surprising result: Increasing preference for advertised brands and decreasing for trains

Creation has effect: After repeated listening rating is better than after having heard the spot only once

Aggressive marketing was appropriate but does not compensate for the performance of
e.g. the FM radio

Surveying of three brands is problematic: Focus on a (new) brand would have been more effective

Thank you for your attention.

Dr. Lars Peters
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RMS Radio Marketing Service GmbH & Co. KG

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