

# Regional Radio Audience Measurement Surveys



## Tool Kit 2020

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## Executive Summary

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### What is RRAMS & how does it work?

Regional Radio Audience Measurement Surveys (RRAMS) are conducted via telephone (CATI). The process is approved by Commercial Radio Australia and independently audited.

RRAMS applies to all regional markets excluding Gold Coast, Canberra & Newcastle (which are included in the GFK Metropolitan radio measurement).

Survey interviews are conducted at varying times during the day and week to ensure randomness and representativeness. To ensure all radio listeners are represented, up to 30% of calls can be made via mobile phone numbers.

### Survey coverage areas & population potentials

All survey coverage areas are based on Commercial Radio Australia's license area profiles.

Population potentials are determined based on license area maps overlaid with population data from the Australian Bureau of Statistics.

### Available statistics & results

Unlike the results from the eight metropolitan markets, the RRAMS are based on a Station Listened To Most and **NOT** Share %. This is because RRAMS data is not collected by quarter hour.

- Station Listened To Most is a % of people who listened MOST to each station in the daypart
- Cume % is the percentage of the available audience that listened to each station in the daypart
- Cume 00s is the reach number, in hundreds, of people who listened to each station in the daypart
- All Cume/Reach statistics are based on a weekly (7 day) period.
- Exclusive Audience % and 00s – listeners who ONLY listened to a single station in the daypart

### **Available Dayparts**

- Overall: Mon-Sun all times
- Breakfast: Mon-Fri 5.30am-9am
- Morning: Mon-Fri 9am-12nn
- Afternoon: Mon-Fri 12nn-4pm
- Drive: Mon-Fri 4pm-7pm
- Evening: Mon-Fri 7pm-12mn
- Weekends: Sat-Sun all times
- Workplace: when listener is at work (not necessarily 9am-5pm)
- BMAD & MA Mon-Fri – Cume statistics

### **Sample size & Reporting**

Determining the optimum sample size will achieve the right balance between desired demographic breakouts and cost. The current minimum sample size is 600 people, 10+ based on restricted demographic reporting. However, larger sample sizes allow more demographic breakout options.

RRAMS can be conducted for particularly small regional markets with 10+ population of <40,000. These surveys require reduced sample sizes, restricting the number of demographic breakouts available.

Recommended sample sizes, along with a table outlining the demographic breakouts are available on pages 10-11 of the Tool Kit.

## **Computer Assisted Telephone Interviewing (CATI) Methodology**

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In 2013 Commercial Radio Australia (CRA) enlisted Xtra Insights to conduct the initial regional radio audience measurement trials, which were used to establish the new regional radio survey model for Other Regional Markets in Australia. Based on the success of these trials, the Computer Assisted Telephone Interviewing (CATI) system is now the approved methodology for Regional Radio Audience Measurement Surveys (RRAMS).

CRA appointed Xtra Insights as the sole provider of regional radio surveys from January 2016 for all markets except the Gold Coast, Canberra and Newcastle, which remain part of the metropolitan survey methodology.

Under the new CATI system, commercial radio stations can commission Xtra Insights to undertake surveys in conjunction with public broadcasters in their licence area.

### **The CATI Room**

The Gold Coast based CATI room is directly responsible to Xtra insights and is accessible to the project managers at all times.

CATI room interviewers receive a comprehensive briefing prior to the commencement of every survey by Xtra Insights. Interviewers are supervised at all times and a minimum of 10% of CATI interviews will be validated during fieldwork.

To minimise non-response, interviewers endeavour to call people at different times throughout the day and on different days of the week. The Gold Coast CATI room hours of operation are:

- Mon to Thurs, 9am-7.30pm
- Fri & Sat, 9am-1pm

Call data reports will be provided to survey stakeholders in an Excel .CSV format.

### **Data Collection & Dual-Frame Sampling**

All RRAMS are conducted using the Wavelength CATI collection software. This is an online system with tools to ensure easy tracking of sample quotas in real-time.

Single person placement is the approved methodology for Other Regional Markets. An exception of household flooding may be used for 10-17s in regions where the population is too small to conduct single person placement methodology.

In December 2014, the Regional Research Sub-Committee of CRA approved a request from Xtra Insights to include mobile-only homes in the RRAMS samples. This resulted in a move to dual-frame sampling, which is used to ensure all radio listeners are represented in Other Regional Markets.

Recent studies have shown including mobile numbers produces a more representative sample than landlines alone. Mobile-only homes are capped at 30% of the in-tab sample, while the other 70% is to be sourced via landline interviews. This cap is to be adjusted in the future when more granular data becomes available about the proportion of mobile-only homes in each Other Regional Service Area.

### **Auditing the Results**

The specifications of Regional Radio Audience Measurement Surveys must meet the requirements of the Commercial Radio Australia Research Committee.

Xtra Insights' processes will be audited by an independent auditor (appointed by CRA) who has free and unrestricted access to all field documents and office procedures. An Auditor's report is distributed to participating stations in the surveyed market.

### **Regional Gold Standard Software**

Commercial Radio Australia have developed a Regional Gold Standard for software companies to provide radio audience measurement software to subscribers in Australia. The companies that have been accredited to-date are Walk Creative (Frequency), Total Exact Solutions (AdVenture) and Roy Morgan Research (Asteroid).

Radio stations and agencies that subscribe to the surveys data can select one of these accredited software providers to access the data using a common calculation base and standard industry terms and parameters. Other providers can also apply to be certified through CRA.

## **Survey Coverage Area & Population Potentials**

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All survey coverage areas are based on Commercial Radio Australia's license area profiles.

After the geographical area to be surveyed has been determined, the population potentials for each Statistical Area (SA2) within the survey coverage area are calculated based on the latest census data collected by the Australia Bureau of Statistics (ABS).

The number of needed in-tab interviews are then determined, corresponding to the percentage of population (10+) within the geographical boundaries of the survey area and the required sample size. This is called quota sampling. A summary of the sample quotas and any weighting methods applied to the data is provided with the final survey report.

Xtra Insights makes every effort to ensure the population data used in a RRAMS is as accurate as limitations will permit.

Changes to an existing survey coverage area will be considered with unanimous agreement of participating operators and final approval from CRA.

## Glossary of Terms

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Unlike the results released in the eight metropolitan markets, the Regional Radio Audience Measurement Surveys are based on a **station listened to most** result NOT a share result. Therefore, it is important any survey findings are not reported as share figures. The following definitions are used to define radio listening in Other Regional Markets.

### STATION LISTENED TO MOST

The percentage of the total radio listening audience who say they listened most to one particular station during a given time period. It is based on a listener's recall of their previous week's listening.

For example, 25.1% of the total radio audience said they listened most to Station A, Monday to Sunday.

### SESSION LISTENED TO MOST

The percentage of the total radio listening audience who say they listened most to one particular station during a given time period. It is based on a listener's recall of their previous week's listening.

For example, 25.1% of the total radio audience said they listened most to Station A, 5.30am-9.00am Monday to Friday.

### CUMULATIVE AUDIENCE (00'S)

The total number of different people who listen to a station for at least 8 minutes during any time period, based on a listener's recall of their previous week's listening.

For example, Station A has 25,000 unique listeners between 5.30am-12.00mn Monday to Sunday.

### EXCLUSIVE AUDIENCE

Exclusive Audience is those people who listen exclusively to a particular station.

For example, of 100,000 listeners in a market, Station A may have a cumulative audience of 50,000. 30,000 of those people may listen to more than one station but the remaining 20,000 only listen to Station A (i.e. they Listen Most to Station A and say they don't listen to any other stations at all). Therefore, Station A's EXCLUSIVE AUDIENCE is 20,000.



## UNDUPLICATED CUME

The total Unduplicated Cume number is a single weighted figure that is based on all listeners who have cumed the radio stations belonging to a particular network, be it through Station Listened to Most or Cumulative Audience response without duplication.

For example:

- Station A has a cumulative audience of 20,000
- Station B has a cumulative audience of 20,000
- 5,000 people listen to BOTH Station A and Station B

If you add the cumulative audience for Station A and Station B you get 40,000 people. However, 5,000 of those would be counted twice. Therefore, UNDUPLICATED CUME for the Network to which Station A and Station B belong is 35,000.

## Sample Size & Reporting

Xtra Insights aims to provide regional operators with a cost-effective service that meets Commercial Radio Australia’s current methodology guidelines.

It’s important to determine the optimum sample size that will achieve the right balance between desired demographic breakouts and cost. The current minimum sample size for a RRAMS (as approved by CRA) is 600 people, 10 years of age and over based on restricted demographic reporting.

Whilst larger sample sizes come at an additional cost, they do allow more demographic breakout options. The table below demonstrates what standard breakouts are reported for each sample size.

<b>REPORTING GUIDELINES OF SAMPLE SIZES</b>				
<b>Sample</b>	<b>n=600</b>	<b>n=800</b>	<b>n=1000</b>	<b>n=1200</b>
<b>People</b>	10+	10+	10+	10+
	10-17	10-17	10-17	10-17
	25-39	18-24	18-24	18-24
	40-54	25-39	25-39	25-39
	55+	40-54	40-54	40-54
	18+	55+	55+	55+
	10-39	18+	18+	18+
	18-39	10-39	10-39	10-39
	25-54	18-39	18-39	18-39
	40+	25-54	25-54	25-54
	55-64	40+	40+	40+
	65+	55-64	55-64	55-64
		65+	65+	65+
				13+
				16-24
				25-34
				35-44
				45-59
				60+
<b>Males</b>	10+M	10+M	10+M	10+M
	18+M	18+M	18+M	18+M
	18-39M	18-39M	18-39M	18-39M
	40+M	40+M	25-54M	25-39M
			40+M	25-54M
				40+M
<b>Females</b>	10+F	10+F	10+F	10+F
	18+F	18+F	18+F	18+F
	18-39F	18-39F	18-39F	18-39F
	40+F	40+F	25-54F	25-39F
			40+F	25-54F
				40+F

### Reduced Sample Sizes for Small Regional Markets

Xtra Insights can conduct surveys for particularly small regional markets with 10+ population of less than 40,000. These surveys will require a reduced sample size, therefore reducing the number of demographic breakouts available.

Below are the recommended sample sizes along with a table outlining the demographic breakouts available.

- n=400 for markets with a 10+ population of more than 25,000 and up to 40,000
- n=300 for markets with a 10+ population of more than 20,000 and up to 25,000
- n=200 for markets with a 10+ population of more than 15,000 and up to 20,000

<b>REPORTING GUIDELINES OF REDUCED SAMPLE SIZES</b>			
<b>Sample</b>	<b>n=200</b>	<b>n=300</b>	<b>n=400</b>
<b>People</b>	10+	10+ Under 40 Over 40 18-54	10+ Under 40 Over 40 18-54 25-54
<b>Males</b>	n/a	10+M	10+M
<b>Females</b>	n/a	10+F	10+F

## Survey Preparation Timeline

Xtra Insights requires all survey participants adhere to the following timeline to ensure a smooth survey experience.

<b>Weeks out from Release Day</b>	<b>Action</b>	<b>Who</b>
8 Weeks	Contract Agreement Details form submitted via Xtra Insights website	Survey Participants
7 Weeks	Questionnaire station list circulated among survey participants for initial discussion & approval	Xtra Insights
6 Weeks	Feedback on/ Approval of questionnaire station list returned to Xtra Insights	Survey Participants
6 Weeks	Station Profile Forms submitted via Xtra Insights website	Survey Participants
6 Weeks	Questionnaire station list circulated among survey participants for FINAL approval	Xtra Insights
5 Weeks	Questionnaire station list approval confirmed	Survey Participants
4 Weeks	Fieldwork Begins	Xtra Insights
2 Weeks	Fieldwork Concludes	Xtra Insights
1 Week	Survey Data sent to CRA approved auditor	Xtra Insights
<b>SURVEY RELEASE DAY</b>		

## Regional Radio Audience Measurement Team

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**Paul Amos**, Managing Director



Paul has over 30 years of experience in radio, having worked for some of Australia's leading radio groups in programming, on-air, and promotional roles. In 1998, Paul was appointed Director and Radio Consultant for (esp) Entertainment Strategy, Programming working with radio stations in Australia and several overseas markets. Since 2003 Paul has developed Xtra Insights into a successful entertainment research company that provides innovative, insightful and affordable audience research to some of the largest and most successful media organisations around the world.

**Bethaney Lawler**, Research Director & Head of Radio Audience Measurement



Bethaney is a Media and Communications Honours graduate from the Queensland University of Technology who began working with Xtra Insights in 2007. Since joining the team Bethaney has gained invaluable insight into the media and entertainment industry and manages small and large scale audience research projects for Xtra's Australian and overseas clients. Bethaney coordinated and pioneered the regional radio research trials conducted by Commercial Radio Australia in 2013 and has been responsible for Project Managing all of the regional radio surveys conducted by Xtra Insights to date.

**Hannah Lovegrove**, Project Coordinator



Hannah joined the team at Xtra Insights in 2016 as a Research Assistant. Hannah holds a degree in Business Management (Marketing), and received first class honours in International Hotel and Tourism Management from The University of Queensland. Before joining Xtra, she worked as a Research Assistant and Tutor within the Business School at the university. Hannah is passionate about data research and analysis, and enjoys applying her skills within the media and entertainment industry.

**Alan Logan** - Software Consultant to Xtra Insights



Alan has extensive experience in the commercial radio industry, having worked previously as an Announcer, Group Program Director and currently as Network Program Manager for ARN. Alan's specialties include radio and media research as well as web development & coding. He has developed Wavelength data collection software and Frequency reporting software with the radio industry in mind. Xtra Insights has worked closely with Alan over the past 12 months in tailoring his software to meet the requirements of the CRA guidelines.

### **About Xtra Insights**

Xtra Insights is an entertainment research company that offers a range of quantitative and qualitative research services.

Xtra Insights has vast experience with regional radio in Australia. Our team understands the different dynamics of regional markets, as is demonstrated by the strong working relationships we have with major regional radio networks including ACE Radio, EON Broadcasters, Grant Broadcasters and Southern Cross Austereo (SCA).

For more information contact the team on **07 3314 6796**.