

NEWS RELEASE

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Radio Joint
Audience
Research
Limited

RAJAR REVIEWS FUTURE DIRECTION OF RADIO AUDIENCE RESEARCH

RAJAR is to undertake an industry-wide review of the future direction of radio audience research and draw up a new three-year strategic plan which is to be published in the latter part of 2008, it was announced today, Monday April 28, 2008. This move follows a unanimous decision by the RAJAR Board to draw a line under its current investment in personal meter testing and actively investigate the introduction of a new online digital survey.

The radio medium has changed rapidly in the past four years, not only in terms of convergence and consolidation but also in terms of the rapid developments in mobile technology and the increasing significance of podcasting and time-shifted listening. RAJAR is fully cognisant of the pace of these advances and changes, as well as the resultant needs of the industry for an audience research system that offers a modern, flexible and more widely encompassing service suitable for the digital age.

As a first step RAJAR has hired Morag Blazey, former chief executive officer of PHD Media Ltd, to undertake an industry-wide consultation. She has been tasked to elicit feedback on how the RAJAR survey should move forward in the coming years. She will also address the issues and concerns of the radio and advertising industries on a raft of topics from the scope and content of the current survey, to reporting and trading turn-around times and proposed innovations including the value of bigger samples, the introduction of an online diary and future requirements for podcasting, programming information, time-shifted listening and event response.

Blazey is to consult with a range of key radio and advertising industry stake holders and her findings, coupled with the results of the online survey, will feed into RAJAR's new three year strategy which is to be announced later this year.

Comments Morag Blazey: *"The pace of change in the radio market is dizzying, and quite rightly RAJAR feels it is necessary to keep pace in order to serve its users as effectively as possible. The project I have been asked to undertake is really interesting, far reaching and genuinely democratic in its intent. I am really excited to be part of it."*

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Meanwhile RAJAR is currently working on the possible introduction of a new online diary which would give the radio industry more flexibility, wider scope and the option of greater in depth analysis. Leading international research agency, Nunwood, has already been commissioned to design an online, interactive diary which is to be field tested in July 2008. IPSOS Media (RAJAR's current fieldwork contractor) is working closely with Nunwood and, subject to the results of the consultation and the field tests, could be tasked to develop a model for the integration of the online diary into the main survey (alongside the existing diary) in the near future.

Comments Sally de la Bedoyere, RAJAR's managing director: *"RAJAR's vision is to offer a modern and more widely encompassing service for the digital age and the consultation, we hope, will give us a clear mandate to move forward on a range of issues. For instance we would like to become the first port of call, not only for audience data, but for measuring engagement, programme changes and event response. We would like to offer bigger samples and reduce costs. We would like to measure all audio distribution regardless of digital or analogue platform; live or listen again; fixed, mobile, or personal listening device; out loud or on headphones; alone or collectively; in the home, the car, the office or elsewhere. We would like to work closely with organisations such as ABC-e and JICIMS to encourage standard metrics and measuring of all station websites and traffic. We would like to be able to adapt the survey quickly as needs change, and deliver greater details with the same clarity as is currently used to reflect trend.*

"In addition, RAJAR would like to be in a position to provide more frequent data, loading seamlessly into an enhanced, user-friendly trading system supporting agencies, advertisers and stations should this be their desire, and to provide up to the minute data for all audio and music broadcasts.

"I am delighted, therefore, that Morag Blazey has agreed to undertake our industry-wide consultation. She is well respected throughout the radio industry and beyond. I am confident she will assist RAJAR in obtaining as broad a picture as possible, from all sectors of the industry, of the requirements for radio audience research over the next three years so that we may formulate a comprehensive, future-proof strategy."

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The decision by the RAJAR Board (which represents all sectors of the radio and advertising industries) to draw a line under its current investment in the experimental electronic measurement panel in London, (launched in January 2007 as a joint venture with BARB) was unanimous. Following a review of the first year's research it was felt that the pace of change and innovation within the industry needed swifter action than electronic measurement is able to offer at this juncture. It has therefore been agreed with TNS (the panel contractor) to cease further data collection from the end of June 2008, and to focus solely on analysing the data already obtained. The Board has also concluded that electronic measurement will not form part of the 2009 RAJAR contract due to significant concerns regarding issues of panellists' behaviour and the feasibility of meter measurement to deliver a credible UK currency for the entire industry, at an affordable cost.

De la Bedoyere continued: *"The RAJAR Board's decision to draw a line under its current investment in the audiometer panel with TNS and actively pursue online diaries is a rational and pragmatic one. Over the past year the pilot has delivered a wealth of data but it has continued to high-light serious concerns with respondent compliance, particularly at breakfast time. In addition, the pilot has thrown up a range of concerns involving sample sizes, panel composition and the practicalities of operating a panel for the entire UK radio market. It was in the light of these concerns, as well as the prospect of a doubling of the financial burden once BARB decided not to renew its involvement in the panel for a second year, that the decision was made.*

"The radio industry spends proportionately more on research than any other medium in the UK. Indeed, RAJAR has led the world and invested £3.5 million into pioneering and extensive research into emergent methodologies including audiometers, all of which we believe will stand us in good stead in the future. However, at this point in time, with the industry changing at such a pace and with a raft of new technologies being introduced into the market place we need flexible, pragmatic and affordable innovations which can be introduced into the survey as soon as possible.

"We are looking forward eagerly to the results of Morag Blazey's consultation with the industry which we are hoping will provide us with a clear direction on how the radio industry would like to move forward. In addition, her findings will be crucial to the shaping of RAJAR's next three year strategy which is to be announced towards the end of this year."

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Comments Jenny Abramsky, director, BBC Radio and Music:

"RAJAR has a strong vision for the future of radio audience research and these measures should appeal to respondents and give RAJAR vital new information in a flexible way."

Comments Andrew Harrison, chief executive, RadioCentre

"RAJAR is one of the most robust audience measurement surveys in the world and has a proven track record of pro-actively evaluating new technologies. It is therefore great news that steps are being taken to move the survey online which provides an opportunity to keep RAJAR relevant to its valued respondents in a digital age. In the last couple of years we have seen a huge shift in the way people listen to radio and I'm delighted that Morag Blazey will be undertaking a consultation to ensure we continue to have the best measurement system that captures all listening now and into the future."

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For further information please contact:

Penelope James

Penelope James Public Relations

Tel: 01303 844555

E-mail: penelope@penelopejamespr.com

NOTES TO EDITORS

RADIO AUDIENCE RESEARCH FACTS

➤ **THE RAJAR SURVEY– new developments since 1999**

- New personal repertoire diary introduced to cope with the increasing number of stations (c. 150 in 1999, now approximately 350 stations)
- Individual diary placement
- Continuous reporting / rolling sample introduced
- Platform listening – Internet, DAB, DTV
- Monitoring of mobile phone listening and headphone listening
- Monitoring of listening via podcast and listen again
- Increased efficiency of sample - sampling segments reduced by approximately 50% (move from postcode sector to postcode districts)
- Improved sampling and reporting
- Faster data delivery

➤ **SPEND**

The radio industry spends more on audience research per annum versus revenue than any other medium. Currently spend is approximately:

- RAJAR £7 million on research vis a vis revenue of £535 million

Compared to:

- BARB £17 million on research vis a vis revenue of £4,600 million
- NRS £5 million on research vis a vis revenue of £2,200 million

➤ **RESEARCH**

RAJAR has spent £3.5 million on research into audio meters since 2001 and has tested four audiometers:

- Arbitron Portable People Meter
- Eurisko Media Monitor
- IPSOS-RSL audiometer
- RadioControl MediaWatch

RAJAR entered a joint venture with BARB in January 2007 which saw the establishment of an experimental electronic measurement panel in the London area.