

C O N F I D E N T I A L R E P O R T

**Joint National Listenership
Research - JNLR Weekdays**

July 2008 – June 2009

PREPARED BY



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JNLR/TNS mrbi

JNLR - JOINT NATIONAL LISTENERSHIP RESEARCH

REPORT: WEEKDAYS JULY 2008 – JUNE 2009

To: Radio Telefis Éireann
Today FM
Capital Radio Productions Ltd.
Radio 2000 Ltd.

BCI – Broadcasting Commission of Ireland
IAPI - Institute of Advertising Practitioners in Ireland
AAI - Association of Advertisers in Ireland Limited

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List of Sampling Points is now available on the JNLR TNS Info site.

TNS mrbi/191927/09-2

1. **JNLR - JOINT NATIONAL LISTENERSHIP RESEARCH COMMITTEE**

The JNLR Management Committee is the organisation responsible for the commissioning and control of radio audience research in Ireland. It comprises representatives of RTE, Today FM, Independent Local stations, the BCI, IAPI and AAI - i.e. all Broadcasting Organisations; the Advertising Agencies; and the major Advertisers.

Control of the survey is handled by the JNLR Management Committee, the members of which at present are:

Gareth Ivory	RTE
Antony Whittall	RTE
Aoife Clabby	BCI
Willie O'Reilly	Today FM
Chris Doyle	98FM
Carol O'Beirne	Red FM
Scott Williams	Q102
Paul Byrne	Radio Kerry
Ed McDonald	AAI
Sean McCrave	IAPI

TNS mrbi is represented at all JNLR Management Committee meetings by Damian Loscher (Managing Director) and Karen Hall (JNLR Director).

2. **CHANGES TO THE JNLR SURVEY**

In January 2005 the new contract period for the JNLR survey began. This involved some changes to the questionnaire and to the sampling procedures. In brief, these changes are:

- The special interest group section of the questionnaire was re-designed in January 2005 incorporating a range of completely new questions.
- From January 2005 the sample size has increased within each franchise area. The target annual reporting sample is 480 weekday interviews and 190 weekend interviews, a significant increase on previous samples. This increased sample will facilitate a greater depth of analysis within franchise area – i.e. listenership measures by demographic cross-breaks.
- The method of collecting Saturday and Sunday data has changed since January 2005. A Monday interview is still conducted to collect listening data for the previous Saturday and Sunday, but this interview is conducted among a fresh sample of respondents, i.e. effectively replacing the ‘recall’ interview system. However, the reporting sample size for the weekend data has been reduced somewhat.

3. JNLR SURVEY OBJECTIVE

The objective of the JNLR survey is to provide reliable estimates of audiences to both National and Local Radio, as a basis for the planning of advertising schedules.

The report is presented in two volumes - Vol. I: Week-day listening patterns;
Vol. II: Week-end patterns.

This report – Vol 1 – provides information on listenership patterns for average week-days. The report is divided into regional reports – National, Local Areas, Dublin, Cork and Regional (Southwest and Southeast).

The data is analysed by standard demographic groupings, and also by Local Radio Franchise areas.

Sample survey techniques provide estimates which are reliable within measurable confidence limits. These limits must be taken into account in the interpretation and use of the data, particularly in the context of examining trends over time. (See Section 8)

4. JNLR SURVEY METHODOLOGY

4.1. Introduction

This report shows average week-day listenership patterns during the 12-month period, July 2008 to June 2009. The findings are based on personal interviews, conducted in-home, with a sample of 14,896 adults aged 15+ in Ireland.

This sample is representative of the adult population of the country, the latest estimate of which is **3.532** million - Central Statistics Office (Quarterly National Household survey – Qtr 1, 2009).

4.2. The Sample

In January 2005, the sample selected for the JNLR survey was increased significantly in each individual franchise area. (The target number of weekday interviews each year = 480 per franchise area).

As an equal number of interviews is conducted in each franchise area, the sample is designed to first address each individual franchise area within the national market. In practice, this means that the required number of sampling points is deployed first across each station franchise area, resulting in a natural spread of interviews nationally. In effect, the sample is designed from the smallest unit to the largest. Weighting at analysis stage is applied to re-align the sample with known population estimates (see Section 5 for further details).

4.3. The Questionnaire

The questionnaire incorporated the following informational aspects:

- Household ownership of radio equipment;
- Extent of listening to radio at all on day prior to interview;
- Stations listened to on day prior to interview (average week-day);
- Listenership patterns by ¼, ½ and 1 hour time segments;
- Location of Listening
- Patterns of listening by week, month and year;
- Special Interest Group information.

4.4. Fieldwork

Interviewing on the survey commenced on 1st July 2008 and extended until 30th June 2009.

Interviewing was conducted by trained and experienced interviewers who work exclusively for TNS mrbi. All received detailed personal briefings on the survey design, the sampling method and the questionnaire.

4.5. *The Report*

This volume Volume 1 reports on average **week-day** listening patterns. Volume II covers **week-end** listening patterns and is presented on the JNLR TNS info site.

The statistical tables in volumes 1 & II are further subdivided by region:

- Part I: National
- Part II: Local Areas
- Part III: Co. Dublin
- Part IV: Co. Cork
- Part V: Regional

The week-end data is collected via interview conducted on Mondays, covering Saturday and Sunday listening behaviour.

The JNLR Committee has commissioned ESPRI DMC Limited, in conjunction with Information Tools (New Zealand), to develop a radio schedule evaluation model for the Irish market. The model is incorporated into the Media Star data analysis system.

In the tabular report the following analyses are provided:

- Weekly reach, past 7 days listenership
 - Average week-day ('yesterday') listenership figures for RTE and for the Independent Radio stations
 - Share of listening by station
 - Reach and Average ¼ hour Audience figures for day-parts - for RTE and for the Independent stations
 - Time segment (¼ hr, ½ hr, 1 hr blocks) for all stations
 - Past week and annual patterns of listening for RTE and for Independent stations
 - Sole and Duplicated listening, by station
 - Yesterday listenership data by SIG's
 - Location of listening
- } *Screen version only-
See TNS info*

The JNLR data is delivered in electronic format via TNS Info, an internet portal designed as a communications link between TNS mrbi and the JNLR user group. TNS Info provides secure on-line access to published JNLR data.

4.6. Additional Analyses of the JNLR Data

The analysis of this survey was undertaken by ESPRI DMC Limited, Dublin, Telephone 087-2700214.

All subscribing radio stations, IAPI Advertising Agencies and purchasers of the JNLR/TNS mrbi Reports have access to the JNLR data base subject to the following conditions:

Analyses for Publication or for promotional purposes

- Analyses of data may only be based on sub-sample sizes in excess of 200
- No analyses of national (or regional station), ¼ hour data, at local franchise area is permitted
- All analyses are subject to verification and correction by the JNLR Committee
- Analyses which do not satisfy the criteria for publication are for internal use only and in the case of local stations may only refer to the data for that local station.

(See Procedures & Standards for JNLR survey on TNS Info site).

Queries relating to special analyses and the use of any data from the JNLR/TNS mrbi Report should be sent in writing to The Secretary, JNLR Committee, c/o 8 Upper Fitzwilliam Street, Dublin 2.

Copyright of the JNLR survey data is held by JNLR.

JNLR – Joint National Listenership Research Report: - Technical Details

5. SAMPLE DESIGN

5.1. The Universe

The Universe to which this survey relates is the adult population aged 15 and upwards, in the Republic of Ireland.

It is based on the C.S.O. Quarterly National Household Survey – Qtr 1 2009, which shows the relevant population to be 3.532 million.

5.2. Sample Design

The sample is designed in two parts:

- a stratified random selection of addresses (sampling points) from the Register of Electors and Geo Directory, to distribute the sample geographically throughout the country, proportional to population of each individual local franchise area;
- the application of quota controls, set for age by sex and for social and working class, to each sampling point.

5.2.1. First Stage Stratification

The first stage in the selection of the sample involved the analysis and stratification of the total population of the country by county (Census of Population 2006 Report).

	<u>Total Population</u> 000's	<u>%</u>
Co. Dublin	1187.2	28.0
Co. Carlow	50.3	1.2
Co. Kildare	186.3	4.4
Co. Meath	162.8	3.8
Co. Louth	111.3	2.6
Co. Kilkenny	87.6	2.1
Co. Laois	67.1	1.6
Co. Offaly	70.9	1.7
Co. Westmeath	79.3	1.9
Co. Longford	34.4	.8
Co. Wexford	131.7	3.1
Co. Wicklow	126.2	3.0

	<u>Total Population</u> 000's	<u>%</u>
Co. Cork	481.3	11.4
Co. Limerick	184.1	4.3
Co. Tipperary	149.2	3.5
Co. Waterford	108	2.5
Co. Clare	110.9	2.6
Co. Kerry	139.8	3.3
Co. Galway	231.7	5.5
Co. Mayo	123.8	2.9
Co. Roscommon	58.8	1.4
Co. Leitrim	28.9	.7
Co. Donegal	147.3	3.5
Co. Sligo	60.9	1.4
Co. Cavan	64	1.5
Co. Monaghan	56	1.3

As it is required that an **equal** number of interviews be conducted in each franchise area, the sample is designed to first address each individual franchise area **within** the national market. In practice this means that the required number of sampling points is deployed first across each station franchise area, resulting in a natural spread of interviews nationally. In effect, the sample is designed from the smallest unit to the largest.

Within each station franchise area the sample is distributed over the required number of sampling points, independently selected each year. This means that those wards/ded's selected in one year have an equal chance of emerging the next year. The geographic make-up of each county/franchise area is stratified across community size – (co. borough; towns 10,000+; towns 5,000-10,000; towns 1,500-5,000 and rural, pop< 1,500). This stratification forms the basis of the control of each local area sample (see matrix below).

Example

	Co. Boros.	Towns 10,000+	Towns 5,000-10,000	Towns 1,500-5,000	Rural <1,500	Total
Co. Dublin	28.7%					28.7%
Co. Louth		1.6%	-	.1%	.9%	2.6%
Co. Waterford	1.1%	-	.4%	.1%	1.0%	2.6%

* Co. Dublin was sub-divided into 5 regions:

Dublin Co. Boro. Nth.	7.4%
Dublin Co. Boro. Sth.	5.2%
Dublin - South	6.1%
Dublin - Fingal	5.0%
Dun Laoghaire - Rathdown	4.9%

5.2.2. Identification of Primary Sampling Points:

Within each cell (i.e. community size) of the matrix, wards/ded's would be selected on a random probability basis (random start point and systematic skip), according to their population, as per Vol. 1 of the Census of Population (Population classified by Area). These chosen ded's/sampling points would represent the location or start point for a cluster of 10 interviews.

Once the sampling points are selected, a "map-spotting" exercise is subsequently undertaken. In other words the points are positioned on the map to ensure as even a geographical spread of the sample as possible. For the period of the new contract, it will be recalled that 480 weekday interviews are required for each local franchise area, to be delivered across 48 sampling points.

5.2.3. Identification of Starting Addresses:

Within each ward/ded a starting address is selected by random probability procedures, from the Register of Electors and Geo Directory. Interviewers would call at the selected address and at every nth address from there, (every 5th house in urban areas and every ¼ mile in rural areas), following a specified "zig-zag" routing. Interviews would be completed at that address if a person resident conforms with the quota controls set for that area.

5.3. Demographic Controls

Within each of the major regions of the country, the population distribution by age and sex was examined and controls were then set for these attributes (age by sex) within each franchise area. The controls were based on the Census of Population 2006 Vol II and updated in light of the 2008 Quarterly National Household Survey.

Social class controls were based on the best estimate of Social Class distribution agreed between the Research Companies conducting media research surveys in Ireland. They are derived from the 2006 Census of Population; the Quarterly National Household Survey; the JNRS survey and the Television Audience Measurement establishment survey.

Controls were also set for working status (full-time), these being based on the Quarterly National Household Survey. (The QNHS provides estimates for working status within the 8 regions of the country – each franchise area was then identified within these 8 regions).

Interviewing on each assignment of 10 interviews was spread over mornings and evenings or over afternoons and evenings.

5.4. Sample Size

5.4.1. Sample Size - Weekday:

Building the sample from the smallest unit (local station franchise area) up, an annual sample size of c10,600 per annum is conducted for **weekday** interviews, i.e. 2,200 relating to each day of the week. The confidence interval surrounding a sample of this size is $\pm 1.2\%$. (The variation only applies to national, all adult, data. Data relating to specific radio franchise areas, based on sub-samples of 480 have a variation of $\pm 5.7\%$. See Section 8 Confidence Limits).

The sample is broadly distributed as illustrated below:

Area	Week-day reporting Sample
Dublin	2,000 ($\pm 2.8\%$) per annum
Cork	1,000 ($\pm 3.9\%$) per annum
Local Area	480 ($\pm 5.7\%$) per annum

5.4.2. Sample Size - Weekend:

With the new research design for collection of week-end data, changes to the week-end sample sizes will be apparent. The week-end sample equals two-fifths of that proposed for week-days i.e. c4,250 per annum, confidence interval, $\pm 1.9\%$. The week-end sample will be broadly distributed as follows:

Area	Week-End Reporting Sample
Dublin	800 ($\pm 4.4\%$)
Cork	400 ($\pm 6.2\%$)
Local Area	190 ($\pm 9.1\%$)

6. FIELDWORK

6.1. Timing

Interviewing commenced on 1st July 2008 to 30th June 2009

6.2. Interviewing

Interviewing on the survey was conducted by fully trained and experienced interviewers who work exclusively for TNS mrbi.

All interviewers who worked on the survey attended a full-day personal briefing, when all aspects of the field/sample design, and the questionnaire were fully explained.

During the course of the survey, interviewing standards were maintained through detailed checking of each completed assignment; through personal supervision of interviewers in field; and through a telephone authenticity check with 10% of respondents.

7. PROCESSING OF THE DATA

7.1. Data Preparation

Editing and coding of the data was handled by TNS mrbi. It was then computerised by Espri Limited, a Dublin-based data processing company.

The table formats were designed by TNS mrbi, were discussed in terms of content and relevance with the JNLR Technical Committee, and approved by the Management Committee.

7.2. Weighting

Weighting of the data was necessary to ensure that all information at franchise area level was weighted back to the correct level of representation in the report.

The weighting was carried out as follows:

- The interviews in each station franchise area were weighted to the estimated population (15+) **in 000's**, of the area - these areas having been defined by the BCI. The combined total, when weighted, then reflected - in 000's - the total population aged 15+ of the country, currently estimated at 3.532 million.
- Weighting to age, gender, social and working status was also adopted to ensure data is correctly reflected in the analyses.

7.3. Table Formats

Consolidated data for **any National stations**, **any RTE stations**, and for **any Regional/Local Radio stations** (established under the BCI) are shown.

(The Local Radio Stations (established under the BCI) are measured primarily in their own local franchise areas - each station being mentioned, by name, in its own area during the course of the interview. In addition, all other listenership to Local Radio Stations , (broadcasting from outside each franchise area) is included under a heading of "*any other local station*". At the briefing of interviewers, any local pirate stations still operating in the country were specifically excluded under this heading - listenership to them was recorded under the heading of "*any other station*".)

In addition to the ¼ hour data, some composite data by **programme blocks** is also provided for all the main stations. Two data elements are shown:

- Reach of programme (time block) defined as "the total number of persons who listened at any time during the time block."
- Average ¼ hour listenership defined as "the average level of the ¼ hour audiences throughout the block" e.g.:

audience	10.00-10.15	21%
	10.15-10.30	24%
	10.30-10.45	25%
	10.45-11.00	25%
	11.00-11.15	20%
	Average =	23%

Listenership to the main stations is analysed Nationally; within Co. Dublin, Co. Cork, South East Region and within local franchise area. Data is provided for the groupings of Males; Females & Housekeepers on a National base only.

7.4. Terms Used In The Report

- | | |
|--|---|
| Listenership: Any Radio | - includes RTE stations; BCI stations; foreign stations; and any pirate stations still operational. |
| Listenership: Any National | - includes RTE stations, Today FM & Newstalk 106FM |
| Listenership: Any RTE Radio | - includes RTE Radio 1; RTE 2FM; RTE Lyric FM and RTE Raidio na Gaeltachta. |
| RTE 1/2FM/Lyric FM | - RTE Commercial Stations |
| Listenership: Any Regional / Local/ Multicity | - includes all Regional, Local & Multi-city Radio Stations set up under the (BCI). |
| Listenership: Home Local Stations | - listenership to the individual station(s) franchised for an area including FM 104, 98FM, Dublin's Q102, Dublin's Country Mix 106.8FM, Spin 1038 & Phantom in Dublin and Corks 96fm/C103 and Corks Red 104-106FM in Cork.

See list of franchise areas - Appendix A. |
| Listenership: Other Regional / Local/ Multicity- | listenership to any regional/local stations not franchised for a particular area but spilling over into it. |
| Mean Number of Minutes (Share Tables) | - the average number of minutes to which radio was listened, among those who had listened to at least half of a time block on the listening grid (i.e. in general, at least 8 minutes). |

- Housekeeper: - defined as a person (male or female) who does the main grocery shopping for a household.
- Housekeeper with dependents: - as above, but residing in a household where there are dependent children or young adults (any age)
- Married/Widowed: - includes those who are separated, divorced or living as married.
- Social Class: - the social class of respondents is based on the occupation of the Head of Household/Chief Income Earner. Where that person is retired, unemployed (or in the case of a female, widowed) social class is based on former occupation.
- Working Women: - defined as all women who are working 30 plus hours per week in a paid job.
- Active Farmers: - defined as the person who has sole or joint responsibility for running the farm.
- Universe Estimate: - Sample represented by actual population estimates in 000's.

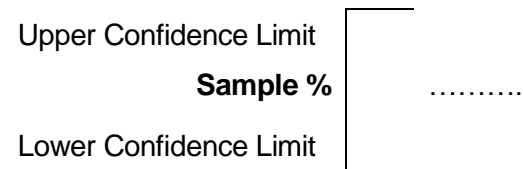
(See JNLR TNS Info – User Info – Terms & Definitions)

8. CONFIDENCE LIMITS

8.1. Meaning

In sample survey findings the percentages emerging are statistically reliable **estimates** of the true percentages which would emerge if the total population had been interviewed.

Because the percentages emerging are **estimates**, it is necessary to build a confidence interval, above and below the estimate, within which one can be 95% confident that the true value would lie (the true value being that percentage which would be found if every adult in the country was interviewed).



8.2. Calculation

The confidence interval relating to any percentage emerging from a simple random sample can be calculated using the following formula:

$$\pm 2 \times \sqrt{\frac{p(100-p)}{n}} \quad \text{where } p = \text{the percentage under consideration} \\ \text{and } n = \text{the sample or sub-sample size}$$

This formula is further modified when the sample is not a simple random sample, but is drawn in a number of stages. This further modification involves multiplying the above formula by approximately 1.25.

Example

If a radio station emerges with 22% listenership the confidence interval would be:

$$22\% \pm (1.25) \quad 2 \times \sqrt{\frac{22 \times 78}{10,664}}$$

i.e. $22\% \pm 1.00$

i.e. the true percentage would lie within the range 21.0% to 23.0%.

NOTE: Special care should be taken in the interpretation and use of percentages based on small sub-samples.

CONFIDENCE INTERVAL
READY RECKONER @ 95% CONFIDENCE LEVEL

Audience Est.	Sub-Sample Size								
	200	300	400	500	800	1,000	1,500	2,000	3,000
10% ±	5.3	4.3	3.75	3.4	2.7	2.4	1.9	1.7	1.4
20% ±	7.1	5.8	5.0	4.5	3.5	3.2	2.6	2.2	1.8
30% ±	8.1	6.6	5.7	5.1	4.1	3.6	3.0	2.6	2.1
40% ±	8.7	7.1	6.1	5.5	4.3	3.9	3.2	2.7	2.2
50% ±	8.8	7.2	6.25	5.6	4.4	4.0	3.2	2.8	2.3
60% ±	8.7	7.1	6.1	5.5	4.3	3.9	3.2	2.7	2.2
70% ±	8.1	6.6	5.7	5.1	4.1	3.6	3.0	2.6	2.1
80% ±	7.1	5.8	5.0	4.5	3.5	3.2	2.6	2.2	1.8
90% ±	5.3	4.3	3.75	3.4	2.7	2.4	1.9	1.7	1.4

9. *FORMAT OF THE INTERVIEW*

Interviewing was in all cases, conducted in the respondent's home, on a face-to-face basis, by TNS mrbi interviewers who were fully trained and briefed.

The interview commenced with two general questions relating to ownership of radios in the home, continued with the detailed measurement of radio listening, and finally moved to home ownership and personal usage of a range of special interest items.

9.1. *Listenership*

The first question in this section sought to identify when respondents last listened to the radio - listening having been defined as *"listening or hearing any part of any programme, no matter where - at home, at work, in a car, in someone else's home, anywhere."*

Respondents who had listened on the day prior to interview, were next asked if they had listened yesterday at any time (no matter how long or short a period) to a list of named stations - this list varied by the location of the interview, as follows:

Co. Dublin

RTE Radio 1
 Today FM
 RTE 2FM
 Newstalk 106FM

4FM

FM 104
 Dublins 98
 Dublin's Q102
 Dublin's Country Mix 106.8FM
 Spin 1038
 Phantom 105.2

Any other regional/local station

RTE Lyric FM
 RTE Raidio na Gaeltachta

Any other station

Co. Cork

RTE Radio 1
 Today FM
 RTE 2FM
 Newstalk 106FM

4FM

Corks 96FM/C103
 Corks Red 104-106FM

Any other regional/local station

RTE Lyric FM
 RTE Raidio na Gaeltachta

Any other station

Regional Radio

RTE Radio 1
 Today FM
 RTE 2FM
 Newstalk 106FM

4FM

Beat 102-103
 Spin South West
 i102-104
 I105-107
 Named '*Home Local*' Station

Any other regional/ local station

RTE Lyric FM
 RTE Raidio na Gaeltachta

Any other station

Rest of Country

RTE Radio 1
 Today FM
 RTE 2FM
 Newstalk 106FM

4FM

Named '*Home Local*' Station

Any other regional/local

RTE Lyric FM
 RTE Raidio na Gaeltachta

Any other station

Respondents claiming to have listened to any of the above stations, were then shown the previous day's programme schedule for each station listened to and asked to specify all the times they had listened. The start and finish time of listening was actually written in on the questionnaire and the intervening codes ringed for each full-time segment listened to, e.g.

7.30-7.45	7.40	01
7.45-8 a.m.		01
8.00-8.15		01
8.15-8.30	8.25	01
8.30-8.45		01
8.45-9 a.m.		01

At editing stage, listenership in the above example in the time segment 7.30-7.45 would be deleted as it did not constitute 8 minutes of the ¼ hour while the 10 minutes in segment 8.15-8.30 qualified as listening in that segment.

Additional questions were asked about the waveband on which listening occurred on the day prior to interview; the location of listening and finally two questions were included to determine patterns of listening throughout the week, and throughout the year for each of the listed stations.

The final section of the interview related to home and personal ownership and usage of a range of products and services, referred to as special interest groups.



Appendices

Appendix A: List Of Franchise Areas

<u>Franchise Area</u>	<u>Code *</u>	<u>Local Station</u>
Dublin City & County	01	FM 104
Dublin City & County	01	Dublin's 98
Dublin City & County	01	Dublins Q102
Dublin City & County	01	Country Mix 106.8FM
Dublin City & County	01	Spin 1038
Dublin City & County	01	Phantom 105.2
Carlow/Kilkenny	29	KCLR 96FM
Louth/Meath	04	LM FM
Co. Kildare	28	KFM
Laois/Offaly/Westmeath	06	Midlands Radio 3
Co. Wexford	07	South East Radio
Co. Wicklow	08	East Coast FM
Cork City	10	Cork's 96FM/ C103
Rest of Co. Cork	26	Cork's 96FM/ C103
Cork City & County	10/26	Cork's Red 104-106FM
Limerick City & County	13	Limericks Live 95FM
Tipperary	27	Tipp FM
Waterford City & County	17	WLR FM
Co. Clare	18	Clare FM
Co. Kerry	19	Radio Kerry

<u>Franchise Area</u>	<u>Code *</u>	<u>Local Station</u>
Galway City & County	20	Galway Bay FM
Co. Mayo	21	Midwest Radio (MWR)
Roscommon/Longford/Leitrim Sth/ Cavan/Monaghan	22/25	Shannonside/Northern Sound Radio
Donegal Sth/Sligo/Leitrim Nth	23	Ocean FM
Donegal Nth	24	Highland Radio

- * The code identifies the sampling points relevant to each station franchise area i.e. the first two digits of the Ass. No. as shown on the List of Sampling Points which is available on the JNLR TNS Info site.