



**FM102
National Radio Survey
Final Report**

February 2006

Executive Summary

The Women's Media Centre of Cambodia founded FM102 radio station in 1999, with the objective of being recognized for high quality radio programs and desire to be respected nationally and internationally for professionalism and ethical leadership in Cambodia's media sector.

The FM102 National Radio Survey which was undertaken in January 2006 reveals that, seven years on, these goals are being achieved and confirms FM102 as one of the countries leading radio stations.

The national radio survey was conducted over a five day period in Phnom Penh city and the provinces of Kompong Thom, Kompong Cham, Prey Veng, Kandal and Takeo.

The chief findings of this report reveal that:

- The majority of respondents identified, in equal measure, FM102 and FM103 as the most popular radio station in Cambodia
- 83.6% of respondents had listened to FM102 including 77% of all youth respondents
- The majority of respondents tune into FM102 because the programs are informative, educational and helpful
- 79.75% of respondents stated that FM102 programs had positively influenced their attitude and behavior
- 72.3% of respondents believe FM102 is uniquely different to any other radio station in Cambodia

These findings show FM102 to be a vital source of unbiased information and entertainment dissemination within Cambodia's public sphere. Respondents of all ages are tuning into FM102 for its unique educational programming and advice, which is responsible for positively impacting listeners lives and contributing to greater social awareness and development in Cambodia.

The 2006 National Radio Survey was enormously successful and will aid in further strengthening FM102 programming, maintain competitive market positioning and support amongst target demographics and the wider donor community.

FM102 National Radio Survey Final Report February 2006

The following report and subsequent recommendations have been compiled on the basis of the FM102 National Survey that was undertaken in January 2006.

The survey was coordinated by Australian Youth Ambassador, Vanessa Quayle, and carried out by three FM102 employees, DUM CHAN Kanha, HIN Kunthea, DOURNG Sokea and volunteer CHHIM Sochintra in Phnom Penh and the provinces of Kompong Thom, Kompong Cham, Prey Veng, Kandal and Takeo.

In 2003 a national survey was commissioned by FM102 and the Women's Media Centre. The results of this survey were too positively skewed in favor of FM102 and the report was called into question. Consequently, no action was taken to improve radio station operations.

Given this context, FM102 deemed it necessary to conduct a further national survey to properly assess:

- FM102's audience demographics
- FM102's current position and identifying the stations primary competitors and developing a strategy to increase market share
- the purchasing habits of FM102's audience, in order to develop comprehensive proposals for advertising clientele (international and national NGO's, institutions and commercial sector clients) and to increase WMC's self generated income opportunities
- the success of current radio programs and to reevaluate programs that are not appealing to our target audience. This will have a three fold effect, by providing quantitative and qualitative findings to help improve FM102 programming whilst reconfirming donor support and commitment to FM102. It also provides an opportunity to effectively respond to any concerns, suggestions and positive feedback expressed by our audiences.

It is strongly suggested that FM102 Radio Director CHEA Sundaneth and Radio Management thoroughly review this report and seek to respond to its findings and recommendations. Two additional reports, Feb 2006 Crosstabulation Data and Gender Specific Statistics, accompany this final report, detailing the precise results of the national radio survey data.



Vanessa Quayle
Marketing & Fundraising Advisor
Australian Youth Ambassador for Development

A Note to Donors and Partners

The following information is an excerpt from FM102's National Radio Survey Final Report

Development of National Survey

The 2006 national survey was developed by FM102 Radio Management, most specifically Radio Manager, VUON Soviry, Marketing Manager DUM CHAN Kanha and Supervisor, SOK Many under the assistance and guidance of AYAD advisor Vanessa Quayle.

(See Appendix A)

Survey Methodology

The sample size of the National Radio Survey came to 391 people, with FM102 interviewers randomly selecting respondents in Phnom Penh city and in the provinces of Kompong Thom, Kompong Cham, Prey Veng, Kandal and Takeo. Between January 10 and January 13, 323 interviews were conducted with the remaining 68 interviews carried out in Takeo on January 16. The gender of the respondents was evenly distributed, with 194 men and 197 women interviewed.

(See Appendix B)

The age distribution was predominately focused on respondents between the ages of 19 to 54 years (80.8%). These ages represent the largest sector of Cambodia's population, and in accordance with the National Institute of Statistics which reveals the average life expectancy in Cambodia is 54.4 years. Therefore the respondents surveyed reflected a fair and even distribution of the Cambodian population.

(See Appendix C)

Occupation

A wide range of occupations were recorded, with the following job titles representing the most common occupations among respondents:

Seller	28%
Student	15%
Farmer/Agricultural worker	13%
Mother – home duties	8%
Government/Military worker	5%

Positioning

The top three radio stations respondents listened to the most are:

1. FM103 & FM102 each representing 25.7% of respondents top 3 choices
2. FM105 representing 16.7% of respondents top 3 choices
3. FM107 representing 5.23% of respondents top 3 choices

The majority of respondents (25.7%) identified, in equal measure, FM102 and FM103 as the most popular radio station in Cambodia.

These results are interesting as FM102's core mission as an NGO radio station is predominately to broadcast positive, educational programming, and operates only 16 hours a day. These restricted hours must be taken into account when making a direct comparison to FM103, a station that is privately run, broadcasts commercial spots and entertainment programs, and operates 24 hours a day. FM103 also promotes Thai commercial products, including women's beauty products, alcohol and tobacco, all advertising which is opposed by FM102.

FM102 operates for 8 hours less and can uniquely differentiate itself, through ethically sound and educational programming from its main competitor is a significant advantage for the station.

Programming

Respondents were asked to identify programs they enjoy listening to the most, irrespective of the radio station. The following programs were identified as the most popular among male and female respondents:

Ranking	Program	Men %	Women%	Total %
1	News Hotline	22.6	15.1	18.8
2	Nice Songs	13.0	23.6	18.1
3	Educational Programs	14.8	16.3	15.5
4	Health Issues	8.8	12.2	10.5

Most popular programs among men: News Hotline and Educational Programs

Most popular programs among women: Nice Songs followed by Educational Programs and News Hotline

FM102's Audience

Out of 391 respondents, 83.6 % of people had listened to FM102 programming:

- 83.9% of men
- 83.2% of women

This is an excellent result, demonstrating the appeal of FM102 programming among both genders. It is particularly significant that FM102 continues to reach the male audience, as increased exposure to programming that focuses on a wide range of issues impacting women, can only lead to greater social change and positive development for both genders.

Reasons WHY listeners tune into FM102

The survey results indicate that the top reasons respondents identified in listening to FM102 programming were:

- 30.4 % tune into FM102 because the programs are informative, educational and helpful
- 20.73 % enjoyed the great music; both new and traditional
- 17.26 % thought FM102 had better reception than all other radio stations
- 16.73 % believe the program topics are up to date and relevant to their family and friends
- 10.3% said the presenter speaks with respect and politeness
- 4% said listeners can talk with speakers and announcers

(See Appendix D)

Most Popular Programs on FM102

Majority of respondents identified the following programs that they enjoyed the most (in order of most popular program):

1. No Means No (Anti-Drugs)
2. Smoke Free World (Anti-Tobacco)
3. Being Mother (Women's Health)
4. Daily and Weekly News
5. Khmer Heritage Song

The most popular *programs* identified in FM102, closely reflect the most popular *topics* respondents enjoyed listening to, across all radio stations. Educational shows, news and current affairs, health issues and nice songs, heavily interest listeners and FM102 programming are successfully nurturing that interest.

Least-Liked Programs on FM102

The following programs reflect the least-liked programs on FM102. However, what must be taken into account is that only 11.3% of the respondents (aged between 15 and 18 years) represent the youth demographic.

1. Children's World
2. Youth Opinion
3. 80% Program (Decentralization)
4. Buddhist Spot
5. Confidence (Social Accountability)

(See Appendix E)

Youth Programming

Not surprisingly, the most popular programs among the youth respondents were music programs. Out of 43 youth respondents, 87 preferences were recorded for FM102's top 6 music programs. Listed in order of popularity the following music programs appealed to FM102's youth audience:

- | | |
|--|-------|
| 1. Khmer Songs Request by Letter | 28.7% |
| 2. Khmer Heritage Song (requested by phone) | 18.4% |
| 3. Modern and Mixed Songs (requested by phone-weekend) | 16.1% |
| 4. Evening Songs for Youths (weekend) | 14.9% |
| 5. Khmer Popular Dancing Songs (weekend) | 11.5% |
| 6. Sweet Song Show (World music requested by phone) | 10.3% |

From the survey results, the bulk of FM102's target audience is aged between 19 and 34 years (47.3%) followed by 34 to 55+ years of age (38.6%)

As previously stated, the youth demographic only represented 11.3% of the entire population surveyed; though 77% of youth respondents aged between 15 to 18 years listen to FM102 programs. This is an extremely positive result which reflects the appeal of FM102 programming across all age demographics.

Audience Awareness of FM102 Programs

Listed below is the percentage of respondents that know what time programs are broadcasted on FM102:

- 21.5% of listeners know when certain programs are being broadcasted due to radio announcements

- 30.2% of listeners know when certain programs are on because they are regular listeners
- 48.4% of listeners do not know when programs are on

This is a strong result as over half of the respondents surveyed know FM102's programming schedule, though there is a significant opportunity to further increase programming awareness among FM102's target audience through greater radio promotion strategies, leveraging upcoming programs and their time slots throughout the day.

FM102 is *DIFFERENT* from other radio stations

An important factor for any business is the need to uniquely differentiate itself from its main competitors. The people that ultimately decide whether you have succeeded in this endeavor are your consumers, your target audience.

FM102 has successfully carved out its own place in Cambodia's radio industry, with 72.3% of respondents stating that FM102 is different from other radio stations.

The most popular response that reflected 26.5% of respondents' opinions was that FM102 provides more general education programs to its listeners than any other radio station.

Listed below is a small sample of other top responses given for this positive differential:

- FM102 broadcasts more anti-domestic violence programs than any other station
- Provides more programs for women, such as women's health care programs
- Reception and frequency is clearer than other radio stations
- It does not serve a political party
- It doesn't cheat people by advertising cigarettes or alcohol products
- Programs teach listeners how to be better people
- Programs are suitable for all ages
- FM102 provides neutral, moralistic programs
- Plays nice songs
- News is broadcasted in English from ABC radio
- Broadcasts clear, neutral and accurate news
- FM102 has many anti-trafficking programs
- FM102's cultural programs are good for Cambodian society

Behavioral Changes in FM102 Audiences

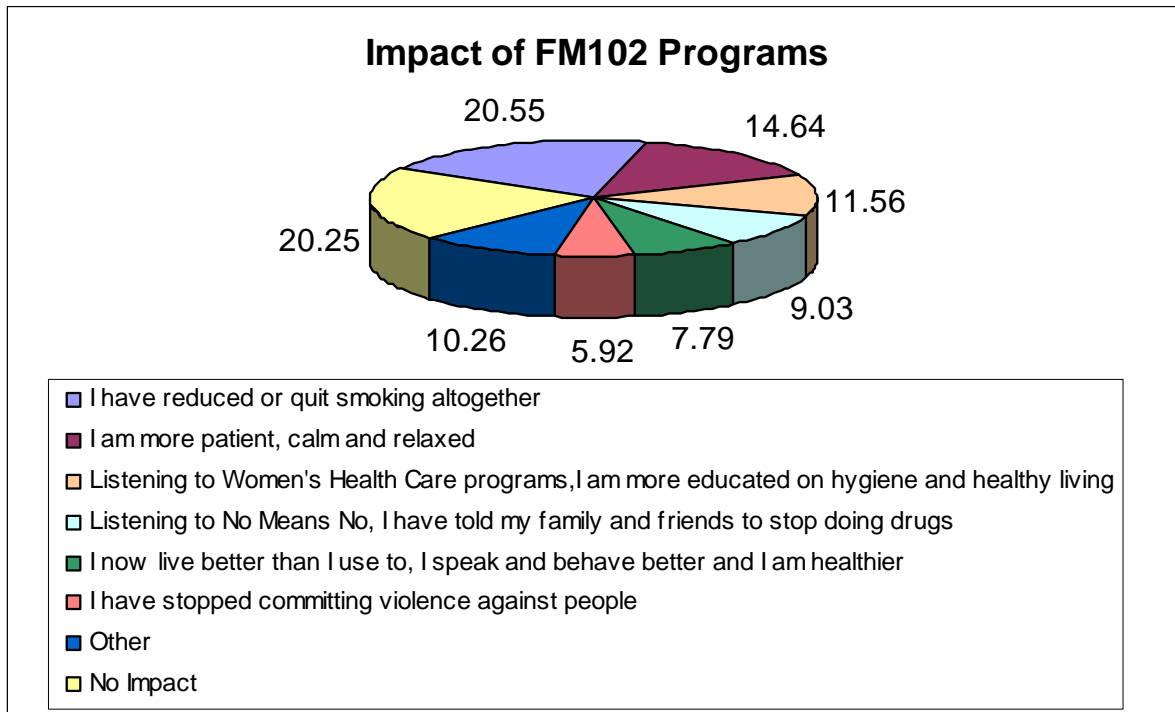
The main goal of most radio stations is to encourage audiences to take action after listening to your stations programs. This is heavily related to product advertisements but in the case of social marketing, the action that is most desired is a change in your audiences' behavior.

Of the respondents interviewed, 79.75% stated that FM102 programs had positively influenced their attitude and behavior.

The respondents provided a wide range of reasons explaining how their lives had been changed and their behavior had improved due to FM102 programming.

The most common response among both genders was after listening to FM102 programming, listeners felt more confident, calm and relaxed.

Additional impacts and responses are provided below:



In conclusion, the 2006 National Radio Survey was a huge success and has helped to provide FM102 with qualitative and quantitative data regarding audience demographics and their listening habits. The stations unique educational programs positively differentiate FM102 from its main competitors, while also appealing to audiences of all ages and gender through a variety of health care programs, great contemporary and traditional music selection and hotline news. FM102 is highly respected amongst target publics and the wider national and international NGO, business and donor community for its programming, which is a huge feat for a radio station that celebrated its 7th year in operation in March 2006.



Appendix: A

FM 102 Audience Survey

Date of Interview:

Participant details must be ANONYMOUS – no name, phone number or address to be recorded

Name of interviewer.....Province.....District.....Commune.....

1. Do you listen to the radio at least once a week?

Yes

No (If NO, end of survey)

2. What is your gender?

Male 1 Female 2

3. What is your age?

15 - 18 yrs 1

19 – 24 yrs 2

25 – 34 yrs 3

35 – 54 yrs 4

55 and over 5

4. What do you do?

Student 1

Farmer/ Agricultural 2

Home Duties (children, housework) 3

Government/ Military 4

Employed – other (please specify) 5

Unemployed 6

5. What is your monthly household income? (How much money does your family make altogether in one month?) *Please tick one box*

No Income 1 US\$ 200 – 300 6

0 – 100,000 riel 2 US\$ 300 – 400 7

100,000 – 200,000 riel 3 US\$ 400 – 500 8

200,000 – 400,000 riel 4 US\$ 500 + 9

US\$100 – 200 5 Not sure 10

6. In your household, who makes most of the decisions when it comes to purchasing small items for your family? (less than \$15 purchase) *Please tick one box*

Father	1	Sister	5
Mother	2	Group Decision	6
Grandparent	3	Myself	7
Brother	4	Other (please explain who)	8

7. In your household, who makes most of the decisions when it comes to purchasing bigger items for your family such as a television, radio, motorbike? (more than \$50 US purchase) *Please tick one box*

Father	1	Sister	5
Mother	2	Group Decision	6
Grandparent	3	Myself	7
Brother	4	Other (please explain who)	8

8. What influences your decision to buy something? *Limit of 3 responses*

Friends and Family	1	Magazines	4	School/University	7
Television	2	Radio	5	Celebrities	8
Newspaper	3	Internet	6		

9. In a week, how often do you listen to the radio? *Please tick one box*

Everyday	1
4- 6 days	2
2- 3 days	3
1 day a week	4
Not sure	5

10. Which radio stations do you listen to the most? *Please choose your top three radio stations*

National Radio	1	FM 98	8
FM 88 Radio	2	FM 99	9
FM 90	3	FM 102	10
FM 95	4	FM 103	11
FM 96	5	FM 105	12
FM 97	6	FM 107	13
FM 97.5	7	No station	14

11. What do you like listening to? *Limit to three responses*

Hot Line News	1	Karaoke/ Music	9
Local News	2	Great Program Announcers	10
International News	3	Call In Show/ Talk Back Programs	11
Sport News	4	General Knowledge Programs	12
Economy Issues	5	Educational Programs	13
Health Issues	6	History and Culture	14
Political Issues	7	Other (Please specify).....	15
Nice Songs	8		

12. What time of day do you usually listen to the radio? Please tick one box

Early Morning	6am - 9am	1
Mid Morning	9am - 12am	2
Lunch	12noon -2 pm	3
Late Afternoon	2pm - 5pm	4
Evening	5pm - 8pm	5
Late Evening	8pm – 10pm	6
Evening to Early Morning	10pm – 6am	7

13. Have you ever listened to FM102?

Yes 1 No 2 (If No, end of survey) Not Sure 3

(FM102 is run by the Women’s Media Centre of Cambodia. FM102 radio programs focus on a range of issues impacting on women’s rights and human rights including HIV/AIDS, trafficking, elections, domestic violence, decentralization, health awareness and poverty)

14. Why do you listen to FM102? You can choose more than one answer

The programs are informative, educational and helpful	1
Topics are up to date and relevant to my family and myself	2
Great music; both new and traditional	3
I can ask guest speakers/ announcer’s their advice or opinion	4
The presenter/facilitator speaks with respect and politeness	5
Best reception (sound of radio)	6
Somebody else chooses the station I listen to	7
Other (please specify).....	8

15. What programs on FM102 do you listen to? *Limit of 6 responses*

Daily and Weekly News	1	Feature Story, Interview....	17
English News live from ABC Radio	2	Khmer songs Request by Letter	18
Khmer News live from ABC Radio	3	Khmer heritage song (requested by phone)	19
Monthly Event News	4	Sweet song Show (World music requested by phone)	20
Our Village (Decentralization)	5	Modern and mixed songs (requested by phone-weekend)	21
The Road of Law in Cambodia	6	Khmer Popular Dancing Songs (weekend)	22
Confidence (Social Accountability)	7	Evening songs for youths (weekend)	23
Smoke Free World (Anti Tobacco)	8	Morning songs	24
No Means No (Anti Drugs)	9	Green Music (Environment)	25
80% Program (Decentralization)	10	FM102 Karaoke (noon)	26
Being Mother (Women's Health)	11	Khmer Traditional songs (noon)	27
Ostosmong (cool)	12	Educational Spot	28
Children's World	13	Educational Short story	29
Happiness of Love	14	Poem Show	30
Youth Opinion (YCC)	15	Buddhist Spot	31
NGO Slot Show	16		

16. Do you know what time of day your favorite programs are on FM102?

Yes **1** (if YES, how do you know)

.....

No **2**

17. Is FM 102 different from other radio stations?

Yes 1

No 2

Unsure 3

WHY?

.....
.....
.....

18. Can you suggest any programs that would make you listen to FM102 more?

Yes - please provide suggestions

No

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.....
.....

19. Have you listened to an FM102 program which has positively changed your attitude or behavior? i.e You have stopped hitting your wife or child due to a domestic violence program you heard on FM102.

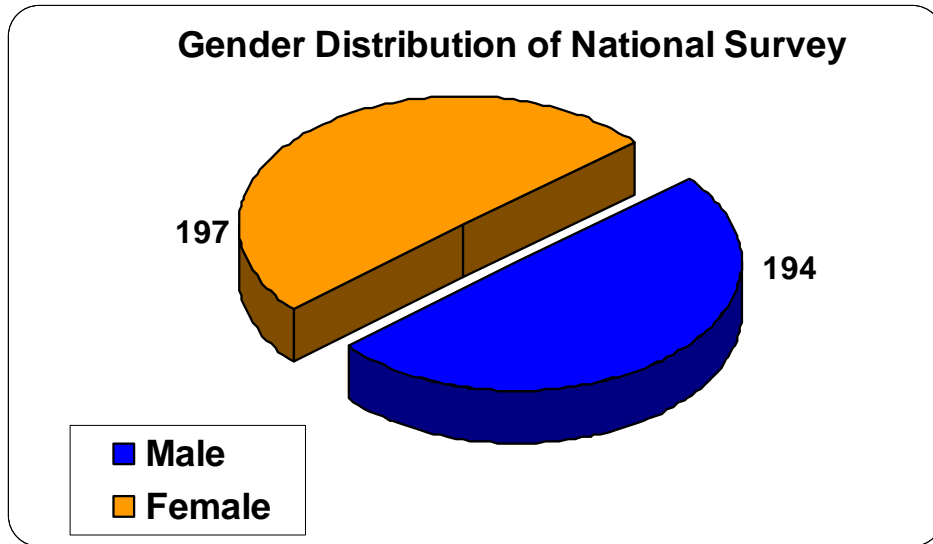
Yes (please explain how)

No

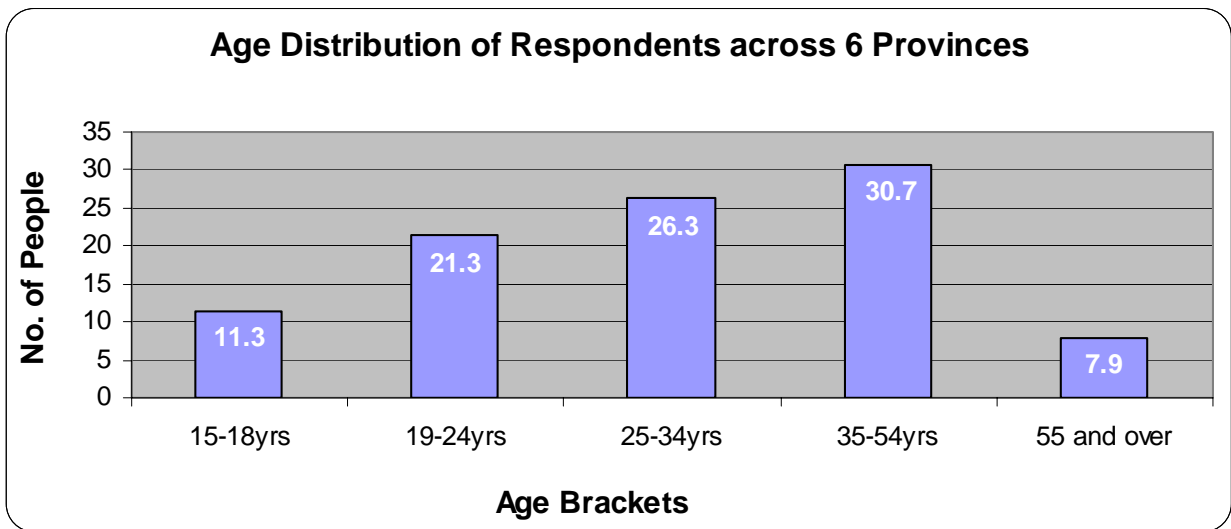
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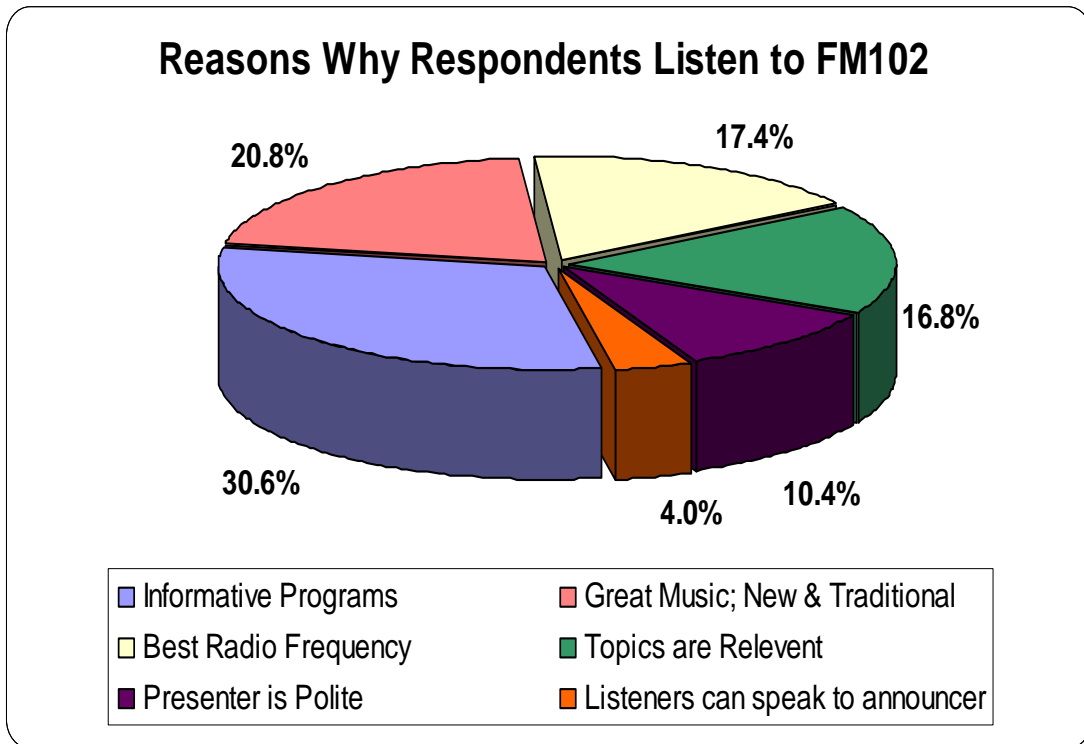
Appendix: B – Gender Distribution of National Survey



Appendix C – Age Distribution of Respondents across 6 provinces

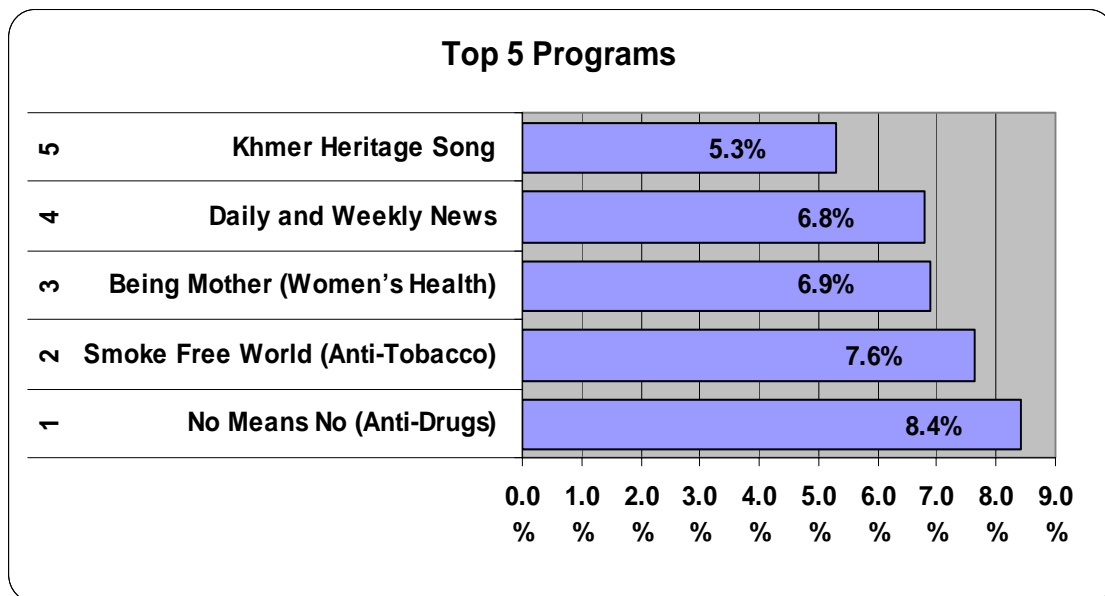


Appendix D: Reasons Why Respondents Listen to FM102



Appendix E: The 5 Most Popular & Least Liked Programs on FM102

Top 5 Programs



Bottom 5 Programs

