



**An application to
Ofcom for the
Independent Local Radio
Licence for Edinburgh
and the surrounding area.**

Dunedin FM Limited
44 Blackford Road
Edinburgh
EH9 2DS

23 September 2004

GENERAL INFORMATION

(a) Name of Applicant, Address, Telephone and Fax Nos., E-mail address

This must be a single legal entity: either a body corporate or a named individual person. If the former, a copy of the certificate of incorporation must be included with the application.

Applicant: Dunedin FM Limited
Company No. 271956. Registered in Scotland
Address: 44 Blackford Road, Edinburgh, EH9 2DS
Telephone: 0131 447 4600
Fax: as above
Email: info@dunedinfm.co.uk

(b) Main Contact (For Public Purposes)

Please nominate at least one individual to deal with any press or public enquiries, stating:

Name: David Mathewson
Telephone (daytime): 0131 336 3214
Address: Dalveen, 7 Barnton Park, Edinburgh, EH4 6JF
E-mail address: dopey@blueyonder.co.uk

(d) Proposed Station Name (if decided)

Dunedin FM

(e) Brief Description of Programme Service

Dunedin FM is a 24-hour speech radio station with prominence of local news, national and international news and information for the people of Edinburgh and the surrounding areas.

SECTION 105(A): ABILITY TO MAINTAIN PROPOSED SERVICE

1. Ownership and control of company that will operate the licence

(a) Board of Directors

(i) Provide the name, occupation, other directorships, other media interests, background and relevant media experience of each director (executive and non-executive), including the proposed chairperson.

NON-EXECUTIVE CHAIRMAN

Name: David Mathewson

Occupation: Investment Banker

Background: Chartered accountant and for 12 years a director of Noble Grossart Ltd, merchant bankers.

Other directorships:

- Noble & Company Ltd
- Sportech plc (Chairman)
- Geared Opportunities Inv Trust plc (Chairman)
- Edinburgh UK Tracker Trust plc,
- Martin Currie High Income trust plc,
- Murray VCT plc,
- Dalveen Ltd

Other media interests:

None

Background and relevant media experience:

As Non-Executive Chairman, and a resident of Edinburgh for over thirty years, David brings a wealth of knowledge, understanding and experience of Edinburgh and the surrounding areas to the Dunedin FM bid. David was involved in one of the most audacious yet successful bids in media history when he helped to advise the team bidding for the Scottish Television franchise in 1992. Furthermore, David has enormous experience in setting up new business ventures.

EXECUTIVE DIRECTOR

Name: Kelvin MacKenzie

Occupation: Chairman and Chief Executive Officer, The Wireless Group plc

Other directorships:

- The Wireless Group plc
- TalkCo Limited
- The Wireless Group Holdings Limited
- talkSPORT Limited
- Talk Radio UK Limited
- TWG Impact Limited
- TWG Payments Limited
- The Wireless Group (ILRS) Limited
- The Wireless Radio Company Limited
- Newstalk 105.2 FM Limited
- Signal Radio Limited
- Radiowave (Blackpool) Limited
- Imagine FM Limited
- Swansea Sound Limited
- Pulse FM Limited
- Valley Radio Limited
- Independent Radio Group Limited
- 96.3 QFM Limited
- Allied Radio Limited
- 102.4 Wish FM Limited
- Switch Digital (London) Limited
- Switchdigital (Scotland) Limited
- TWG-EMAP Digital Limited
- TWG-EMAP Digital (B&H) Limited
- The Digital Radio Group (London) Limited
- Soccerbet Limited
- South West Radio Limited
- New City Radio Limited
- Forever Broadcasting Limited
- Grand Central Broadcasting Limited
- Wolverhampton Area Radio Limited
- Tower 107.4 FM Limited
- Forever Broadcasting Digital Radio Limited
- Newport FM Limited
- BOLD FM Limited
- Dunedin FM Limited
- RSB 1 Limited

Other media interests:

None

Background and relevant media experience:

From 1982 until 1994 Kelvin was Editor of the Sun newspaper. He was formerly Managing Director of BSkyB Group plc before joining the Mirror Group plc as Deputy Chief Executive and Managing Director of Live TV Limited. Kelvin founded The Wireless Group in 1998, and has grown and developed the group over the past five years to become the one of the largest independent radio broadcasters in the UK. Importantly in relation to the Dunedin FM bid, it is through Kelvin's Chairmanship that talkSPORT has moved to become the first ever profitable national speech radio station in the UK.

EXECUTIVE DIRECTOR

Name: Keith Sadler

Occupation: Chief Financial Officer and Company Secretary, The Wireless Group plc

Other directorships:

- The Wireless Group plc
- talkSPORT Limited
- Wave 102 FM Limited
- Wire FM (1997) Limited
- TWG Impact limited
- 1458 Big AM Limited
- TWG Payments Limited
- The Wireless Group Holdings Limited
- Imagine FM Limited
- Swansea Sound Limited
- Pulse FM Limited
- 102.4 Wish FM Limited
- Talk Radio UK Limited
- The Wireless Radio Company Limited
- Off The Telly Productions Limited
- Radiowave (Blackpool) Limited
- Newstalk 105.2 FM Limited
- Valley Radio Limited
- Signal Radio Limited
- Independent Radio Group Limited
- Leahurst Investments Limited
- Allied Radio Productions Limited
- Town Centre Properties (Subsidiary) Limited
- 96.3 QFM Limited
- Allied Radio Limited
- Galactichalo Limited
- Wareselection Limited
- Soccerbet Limited
- The Wireless Group (ILRS) Limited
- South West Radio Limited
- New City Radio Limited
- Forever Broadcasting Digital Radio Limited
- Tower 107.4 FM Limited
- Wolverhampton Area Radio Limited
- Grand Central Broadcasting Limited
- Forever Broadcasting Limited
- Newport FM Limited
- Somethin' Else Sound Directions Limited
- BOLD FM Limited
- Dunedin FM Limited
- RSB 1 Limited

Other media interests:

None

Background and relevant media experience:

Keith was appointed to the Board of The Wireless Group plc in July 2000. Formerly he was Group Finance Director of News Communications and Media plc and Bristol United Press plc, both quoted regional newspaper companies. Prior to that he was Group Treasurer of Mirror Group plc.

(ii) If there are firm plans to appoint any further directors, provide information (with details of any specific individuals in mind).

The board of Dunedin FM Limited will be supplemented with the appointment of the Station Director following a licence award. In addition, it is also our intention to appoint Andy Crummey as a Non-Executive Director on award of the licence. There are no firm plans to appoint any further directors.

NON-EXECUTIVE DIRECTOR

Name: Andy Crummey (Non-Executive Director)

Occupation: Managing Partner, Agency Assessment Limited

Other directorships:

- Managing Partner, Agency Assessments North

Other media interests:

None

Background and relevant media experience:

Andy's career is firmly rooted in the media, starting with Thomson Regional Newspapers at the Scotsman in 1978. Subsequently he joined Scottish Television in Glasgow where he rose to become Sales and Marketing Director, Scotland. In 1995 he left terrestrial TV to join the emerging satellite broadcaster BSkyB. During his time at Sky, Andy was responsible for establishing the multi-channel brand with Scottish based advertisers and agencies and produced a significant revenue stream in the process.

Having worked on a number of projects with Agency Assessments International, Andy established Agency Assessments North in October 2003 to address the growing need from Clients in Scotland and the North of England for specialist advice in getting the very best out of agency relationships.

Andy is a well-known and respected industry figure, bringing with him considerable knowledge of the regional client and agency marketplace. He will be an invaluable member of the Dunedin FM launch team. Andy is 48 years old and lives in Edinburgh with his wife Vivien.

(b) Proposed Investors and Shareholding Structure

Full details of the proposed shareholding structure should be provided, including:

(i) Names and addresses of all existing or proposed shareholders.

The Wireless Group plc
18 Hatfields
London
SE1 8DJ

(ii) Total number, class/classes of shares and issue price of shares (specify voting, non-voting, preference, other etc.).

Classes of share capital	Number of shares	Par value	Issue price
Voting	2,000,000	£1.00	£1.00
Non-voting	-	-	-
Preference	-	-	-

(iii) All voting shareholders and holders of 5% or more of non-voting shares and loan stock should be named. State the number, class/classes and price of shares to be issued to each investor.

The Wireless Group plc will hold 2,000,000 ordinary voting shares, 100% of the total issued share capital of Dunedin FM Limited.

(iv) Outline any shareholder agreements or arrangements that exist.

There are no shareholder agreements or similar arrangements.

(v) Where a corporate body other than a current Ofcom licensee will be providing 30% or more of the required funding, details should be given of its directors and main shareholders, and of its activities.

The Wireless Group plc is the holder of a number of Ofcom radio licences.

(vi) Ofcom may request additional information (e.g. a banker's letter, statutory/management accounts) regarding the shareholders, or any other providers of finance, listed in the application.

The Wireless Group plc is happy to provide Ofcom with any additional information it may require in this regard.

(c) Involvement of the Applicant in Specified Activities

Details are required of the involvement by the applicant and its participants (including shareholders or other subscribers of more than 5% of the applicant's total funding requirements) in any of the activities listed below, and the extent of the interest. For these purposes, the applicant includes associates of the applicant (i.e. directors and their associates and other group companies).

(a) Advertising agencies;

None

(b) Newspapers;

None

(c) Other broadcasting interests;

The Wireless Group plc owns and operates the national commercial service talkSPORT and the following sixteen local commercial radio stations under licences from Ofcom: Imagine FM; Peak 107 FM; The Pulse; Pulse Classic Gold; Q96; Signal 1; Signal Two; Swansea Sound; Tower FM; Valleys Radio; 96.4 FM The Wave; Radio Wave 96.5 FM; Wave 102 FM; 107.2 Wire FM; 102.4 Wish FM; 107.7 The Wolf.

In addition The Wireless Group is a leading participant in the following digital multiplex operators: Switchdigital (Central Scotland); Switchdigital (Aberdeen); Switch Digital (London); Digital Radio Group (London); TWG-EMAP Digital (Bradford & Huddersfield); TWG-Emap Digital (Swansea); TWG-Emap Digital (Stoke-on-Trent).

(d) Bodies whose objects are wholly, or mainly, of a religious nature;

None

(e) Bodies whose objects are wholly, or mainly, of a political nature;

None

(f) Local authorities;

None

(g) Other publicly funded bodies.

None

2. Financial and business plan

(d) Overall Financial Strategy

Provide a concise summary of how the applicant considers it is able to establish and maintain, throughout the licence period, its proposed service, and how this licence fits in with the investors' strategy.

Dunedin FM is (and will remain) a wholly owned subsidiary of The Wireless Group, and as such will have full, unrestricted access to the group's considerable operational expertise and financial resources, both during the pre-operational period and throughout the twelve year licence period. Dunedin FM will benefit from The Wireless Group's unrivalled experience in running successful and profitable speech radio in the UK. Developing regional speech radio stations across the UK has been a significant part of The Wireless Group's development strategy over the last eighteen months. In addition, The Wireless Group has a unique understanding of what is required in order to make speech radio sustainable and profitable, and the Dunedin FM financial strategy reflects this unparalleled knowledge.

The Wireless Group is the UK's fifth largest commercial radio broadcaster operating talkSPORT, the national sports station, and 16 regional and local radio stations. The group's stations consistently rank as some of the most listened to commercial radio stations in the UK. The group is also the UK's largest and most profitable speech-based commercial radio broadcaster. Furthermore, The Wireless Group has both current and prior experience of operating commercial radio operations in Scotland through its current ownership of QFM in Glasgow and Wave 102 in Dundee, and its prior ownership of Scot FM (now re-branded Real Radio). Dunedin FM is therefore entirely confident it has sufficient radio expertise to establish its proposed service.

Furthermore, Dunedin FM is highly confident in its ability to maintain its proposed service through to profitability and thereafter throughout the twelve-year licence period. Dunedin FM's parent company, The Wireless Group, is listed on the London Stock Exchange with a market capitalisation of approximately £90 million. The group is highly cash generative, generating £2.4 million of operating cash flow in the financial year ending 31 December 2003. Furthermore the group has access to significant bank facilities, and as at the end of the third quarter of its current financial year had access to un-drawn committed banking facilities in excess of £6 million. This compares to the peak cash-funding requirement anticipated within the Dunedin financial projections of under £2.0 million. Given the Dunedin FM cash funding requirement is more than three times covered by existing debt facilities (excluding any allowance for future group cash flow generation) Dunedin FM is highly confident of its ability to maintain its proposed service throughout the licence period.

As regards investment strategy, the application to Ofcom for the Independent Local Radio Licence for the Edinburgh area is entirely consistent with The Wireless Group's strategy of growing its position as a leading commercial radio operator. The Wireless Group is committed to extending its leading position in UK commercial radio both through new licence applications and through acquisitions. In relation to new licence applications, the group's preference is to maintain 100% control of new licences, and not over extend local station board membership to those who would not add significant value to the operations of the station. This application for the Edinburgh ILR licence is consistent with this strategy, and furthermore is also consistent with The Wireless Group's desire to extend the availability of high-quality, profitable, speech-based commercial radio to key UK metropolitan areas outside London.

(e) Funding

Detail the sources of finance that will be used to fund the licence, under the following headings:

(i) Share capital

Should Dunedin FM be successful in its application for the Edinburgh FM licence, the pre-operational and operational cash requirement will be fully funded by The Wireless Group plc under existing banking facilities provided by Barclays Bank. The peak cash-funding requirement of Dunedin FM is £1,984,000 including cost and capital expenditure contingencies of £39,000. It is anticipated therefore that up to £2,000,000 will be raised by the subscription for 2,000,000 new shares in Dunedin FM by The Wireless Group plc at a subscription price of £1.00 per share (see Section 1 (b) above). There are no plans to invite participation in Dunedin FM by any other investors, and Dunedin FM will remain a wholly owned subsidiary of The Wireless Group.

(ii) Loan stock

Not applicable

(iii) Leasing/HP facilities (capital value)

Not applicable

(iv) Bank overdraft

Not applicable

(v) Grants and donations

Not applicable

(vi) Other (please specify)

Not applicable

Where relevant, provide information on:

(i) Loan terms (e.g. interest rate, repayment terms, redemption/conversion terms);

Not applicable

(ii) Assets leased

Not applicable

All of the funding identified above should be confirmed to the applicant. Explanation should be provided if this is not the case.

Confirmation of funding from The Wireless Group to Dunedin FM is set out in Appendix 2.

(f) Financial and Audience Projections

The purpose of this section is to allow the applicant to demonstrate its understanding of the market. The forecasts should be based on reasonable assumptions that are logically applied and justifiable.

The applicant should provide financial projections on an annual basis for the licence. The projections must include:

- (i) Profit and loss accounts
- (ii) Balance sheets
- (iii) Cash-flow forecasts

The period covered is at the discretion of the applicant, but should be justified. The forecasts should be supplied on an Excel spreadsheet or similar, with any accompanying guidance notes. They may be submitted in confidence.

This section must include a full listing of the underlying assumptions on which the financial projections are based, relating such assumptions clearly to other parts of the application (e.g. proposed format, extent of coverage area).

The applicant should detail how revenue figures were derived, distinguishing between local, national and sponsorship revenue.

Our financial projections are supplied separately in confidence (Dunedin FM financial projections.xls) together with guidance notes listing the detailed assumptions used in the preparation of the forecasts (Dunedin FM guidance notes.doc)

The applicant should also address the following issues:

(i) The target audience for the proposed service;

The target audience for Dunedin FM will be the population living in Edinburgh and the surrounding areas. The Dunedin FM Total Survey Area (TSA) will encompass an adult population of 1,118,000 adults aged 15 years and above. This figure corresponds to the 15+ marketed TSA population operated by Forth One as noted in Ofcom's licence application.

Separately, population forecasts supplied by NTL suggest that a figure in excess of 1,205,000 residents would receive a signal in excess of 48dB(μ V/m) from the main transmitter. Modern high sensitivity receivers will receive a good mono service beyond this limit. The transmission antenna is the same as used by Forth 1, and therefore, for business purposes and simplicity with agencies and advertisers Dunedin FM will assume a TSA similar to Forth One (i.e. 1,118,000 adults aged 15+).

As a 24 hour speech, news and information station, led by local news for Edinburgh and the surrounding areas, Dunedin FM will attract a core audience of adults aged 40+ who, as demonstrated in our research (set out in more detail later in this application on page 33) are gravitating towards BBC local and national speech dominated services.

CACI Census data clearly demonstrates that the UK population continues to grow older and Edinburgh is no exception. Taking 2001 census data as a base, there is a marked shift toward an older population over the twelve-year period of the Edinburgh licence as demonstrated within Table 1 below.

Table 1

	2001	2008	2012	2016
Aged 15-40	35.5%	33.4%	32.3%	31.9%
Aged 40+	46.5%	50.3%	52.1%	52.8%
Aged 50+	32.5%	34.7%	36.6%	38.8%

Source: CACI Ltd

Our research demonstrates that speech radio primarily appeals to an older audience. From the reach study we have undertaken as part of this application, we believe Dunedin FM will establish a core target audience of 40+ adults. Over the course of the twelve-year licence period, the size of this audience will grow from 624,513 to 729,546 bringing an additional 105, 033 additional core target adults into the Dunedin FM market. This 17% growth of 40+ adults is against a forecast 6.2% adult growth for Edinburgh as a whole (i.e. almost three times faster than the overall adult growth rate for the area).

(ii) Projections for listenership ratings over the first three years of the service;

The Dunedin FM audience projections (set out in Table 2) assume 12.5% weekly reach by the end of its first year of operation with eight average hours listened (per listener, per week), rising to 13.5% reach and nine average hours in Year 2, and 14.5% reach and nine average hours in Year 3.

Table2: Dunedin FM Audience Forecasts

	End Year 1	Year 2	Year 3
Total Survey Area (000)	1,118	1,118	1,118
Adult weekly reach %	12.5%	13.5%	14.5%
Adult weekly reach (000)	140	151	162
Average weekly listening hours	8.0	9.0	9.0
Total weekly listening hours (000)	1,118	1,358	1,459

These forecasts represent a 10% reduction to the reach and hours figures predicted by our research (set out in Table 3). Dunedin FM has taken this conservative approach so as to underpin the robust nature of its financial projections, and reflect the competitive nature of the Edinburgh radio market.

Table 3: Audience Forecasts derived from research study

	Year 1	Year 2	Year 3
Total Survey Area (000)	1,118	1,118	1,118
Adult weekly reach %	14.0%	15.0%	16.0%
Adult weekly reach (000)	156	168	179
Average weekly listening hours	8.9	10.0	10.0
Total weekly listening hours (000)	1,388	1,677	1,789

The audience forecasts generated from our research study uses a formula derived from well-established principles. The first year weekly reach was derived by taking only those respondents who said they were “very likely” or “fairly likely” to listen to the proposed service and applying a weighting of 60% to the number who said they were “very likely” to listen and 10% to the number who declared themselves “fairly likely” to become listeners.

Average hours listened were derived from the declared intention of respondents to listen to the new station on a number of weekdays and weekend days and the average length of time they felt they would listen on each day.

In addition, we have benchmarked our audience projections with the performance of the existing ILR stations in the area. Against the reaches achieved by both Real Radio and Forth our projections are modest and similarly 25% lower than for the regional, non-Edinburgh focused BBC service, Radio Scotland. In addition, as demonstrated through our research, we are targeting a very clear commercial gap in the market, and therefore, are confident that our projections for both reach and hours will be achieved.

Further underpinning our audience projections is a substantial marketing and promotional budget. In order to make our mark on the area very quickly we have budgeted a significant amount for marketing and promotional activity surrounding the launch of Dunedin FM. Furthermore, our business plan provides for significant on-going marketing and station promotion in future years. In addition to this Dunedin FM will maintain a consistently high profile in the area using an OB promotional vehicle that forms part of our initial capital expenditure. The vehicle will be highly visible at events and happenings throughout the area and will also provide the base for our future planned outside broadcasts.

(iii) The expected impact of the proposed service on existing services, in listenership terms.

The proposed service, Dunedin FM, is a speech based proposition and radically different from any other local commercial station available in the area. The station will target a core audience of 40+ year old adults, therefore avoiding direct competition against other commercial radio stations in the area (Beat, Real Radio and Forth One) that target a core audience of 15-34 year olds.

The quantitative study undertaken for Dunedin FM by First Surveys asked respondents if they would be likely to listen to the new station. If they responded positively, respondents were then asked how they would incorporate this listening into their repertoire (i.e. by increasing their total radio listening, listening less to an existing station, or stopping listening to an existing station).

The impact of Dunedin FM is likely to be gentle on the current broadcasting landscape as 53% of respondents who said they were “very likely”, “fairly likely” or “neither /nor likely” to listen to the new station, said that they would increase their total radio listening to accommodate the new station. 41% of respondents said they would listen less to a current station to accommodate Dunedin FM, and only 6% said they would stop listening to a current station.

The high percentage (53%) of respondents who said they would increase their listening demonstrates that Dunedin FM will broaden the choice of radio listening and will help grow the overall commercial radio market in Edinburgh rather than cannibalising existing services. In addition, 14% of current non-listeners to radio said that they would be likely to listen to the new station.

Of the respondents that said they would listen less to a current station, less than half said they would listen less to one of the local commercial stations covering the Edinburgh area.

Finally, of the respondents that said they would stop listening to a current station, the top three nominated stations (accounting for nearly half of all nominations) were BBC Radio Scotland, BBC Radio 2 and BBC Radio 4.

Summarising the research would suggest that:

- 53% of Dunedin listening hours would be incremental, growing the total market
- 16% of Dunedin FM hours would come from people switching some or all listening from BBC Radio stations
- 16% of hours would come from people switching some or all listening from ILR stations
- 15% of hours would come from people switching some or all listening from national commercial or other stations

If the above model is applied to Dunedin FM's projected Year 3 listening figures of 14.5% weekly reach, 9.0 average weekly hours, and 1,459,000 total weekly hours (assuming a constant TSA size of 1,118,000) the following effects can be inferred:

- Dunedin FM could deliver an incremental 773,000 listening hours per week to the total radio market, a 3.5% increase.
- Combining incremental and switched hours, adding Dunedin FM to the ILR stations available in Edinburgh (Real, Beat, Forth One and Forth 2) could add 1.2 million hours to commercial radio's market share, taking it from 38.8% to 42.9% for all adults, and from 31.5% to 36.0% for the 40+ adult audience.

3. Transmission proposals

(g) Transmission Proposals

(i) Provide details of the transmission site, or sites, you propose to use, under the following headings:

(a) Name and National Grid Reference of site;

Ntl Craigkelly
National Grid Reference NT233 872

(b) Height of site above Ordnance datum (in metres);

182 metres

(c) Height of transmitting aerial above ground level (in metres);

118 metres above ground level (an existing antenna system)

(d) Radiated power in either or both planes of polarisation, and aerial radiation pattern (if no aerial radiation pattern is submitted, it will be assumed without exception to be omnidirectional).

5kW HP + 5kW VP using an existing antenna system. We understand from ntl that Ofcom already have details of this antenna. Ntl will be pleased to answer any questions that Ofcom may have in connection with this antenna system we proposed to share.

The applicant should confirm whether he believes that his intended mast aperture will be available, and whether, where required, planning permission can be obtained. Where appropriate, evidence to support this belief should be provided. Details of any negotiations which have been entered into with the site owner(s) should also be provided.

Ntl, the site and antenna owner confirm that the existing antenna system is capable of being shared at 107.0MHz. Planning permission will not be required, as no external changes to the existing system will be made.

The information provided above must take into account any requirements set out in Section 2 of this Notice. In the event of minor non-compliance, Ofcom may revisit an applicant's proposals with a view to modest adjustment following award and closer scrutiny. Significant non-compliance may render the application liable to disqualification.

Ntl have noted that the requirements set out in Section 2 of the notice and confirm that, in their opinion, the existing antenna system that we propose to share meets the Ofcom requirements.

(ii) Please provide a detailed computer predicted map (in colour) of the coverage anticipated using the transmission site(s) and parameters described above.

A coverage map is included on page 17 of this document

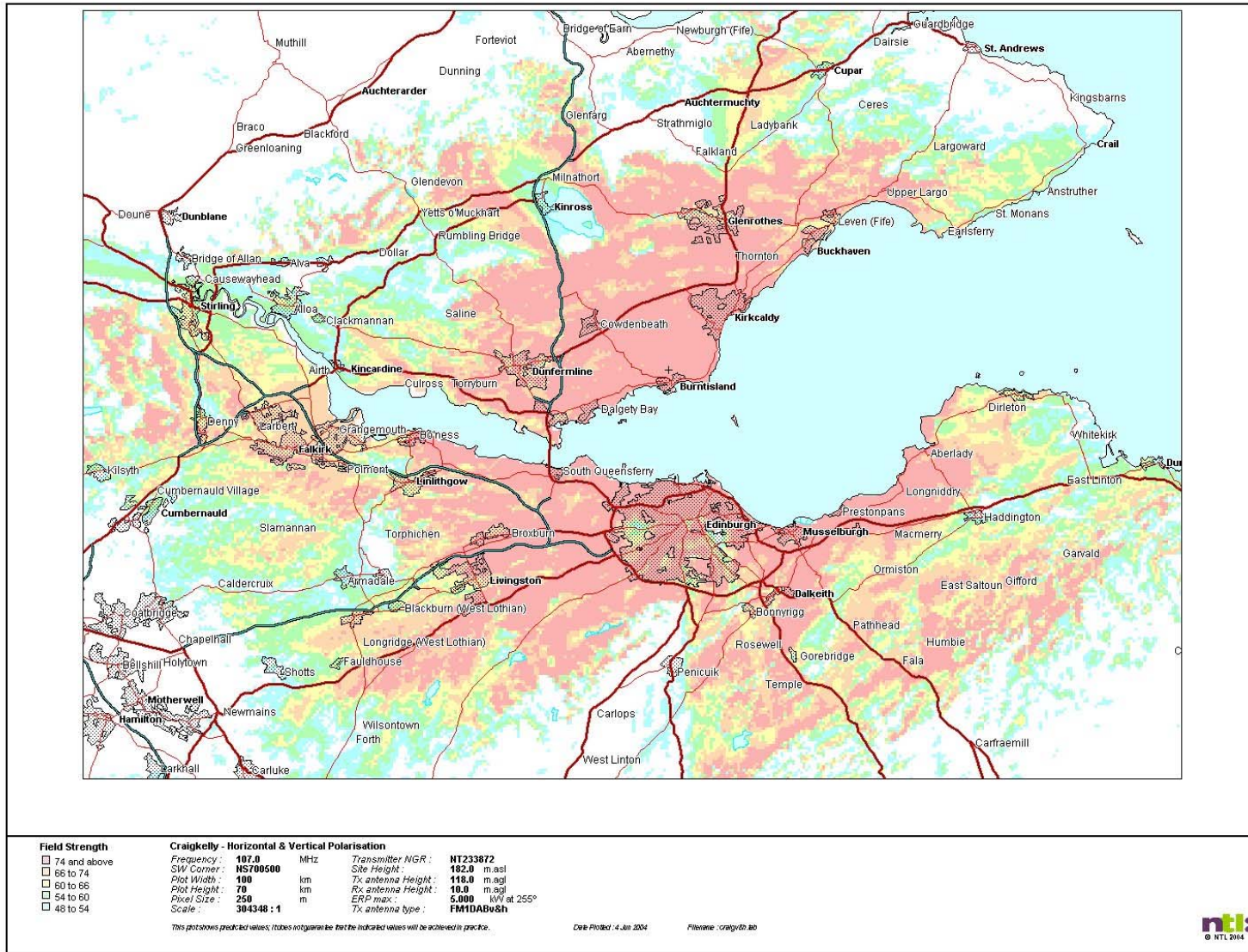
(iii) Describe proposed arrangements for transmission provision (installation, maintenance and repair). The transmission system and equipment must comply with the Engineering Code originally published by the Radio Authority, which represents Ofcom's current policy and is available at: www.ofcom.org.uk/codes_guidelines/broadcasting/radio/codes/engineering_code.pdf

We intend to contract with ntl who will install, commission and maintain the transmission system on a Total Broadcast Contract basis. The service will include telemetry and remote monitoring which reports on a 24 hour basis to the ntl control centre at Emley Moor. Ntl have trained personnel who will regularly check on transmission parameters. Ntl work to the Engineering Code originally published by the Radio Authority.

(iv) What is the anticipated time-lapse between the award of licence and start of broadcasting? Applicants should note that failure to commence broadcasting the service within two years of the date on which the licence is awarded is likely to lead to the offer of a licence to the successful applicant being withdrawn. In these circumstances the licence would be advertised afresh and a new competition would be held to award the licence.

Dunedin FM will be ready to commence broadcasting within nine months of being awarded the Edinburgh licence. Proposed month for launch would be October 2005.

Dunedin FM coverage predictions



SECTION 105(B) AND (C): CATERING FOR TASTES AND INTERESTS/BROADENING CHOICE

a) Programming Philosophy

(i) This sub-section of the application should take the form of a statement setting out the applicant's overall programming philosophy and vision for the radio service.

Dunedin FM is part of a Wireless Group vision to build a network of local speech based stations across the UK. As documented elsewhere in this application, speech radio is the dominant radio listening format in the UK and only a fraction of this comes to the commercial sector.

The Wireless Group is the leading advocate for the vital and valued role local commercial stations have to play in their communities. We believe that a healthy, integrated station is an essential ingredient of any local community and Dunedin FM will be no exception.

We believe that this programme philosophy, with an unswerving commitment to local content, is a key contributor to The Wireless Group's market leadership in many of the UK's most competitive radio landscapes. This gives The Wireless Group stations the edge over more widely focused stations and the specialised music services. It is our firm intention to apply this commitment to local content to the Dunedin FM proposition. For Dunedin FM our philosophy will be "relevant and appealing" local content.

Our programme philosophy mirrors Ofcom's definition of localness as characterised by news, information, comment, outside broadcasts, what's-on information, travel news, interviews, charity involvement, weather, local artists, local arts and culture, etc. This is reflected in the Dunedin FM programme schedule and is designed to give listeners a "feeling of ownership" particularly with an emphasis on interaction and talkback radio.

The Wireless Group believes that "localness" is the unique selling point that drives listenership to all our stations, including Dunedin FM. Furthermore, we do not believe in sharing programming strands through our local stations unless there is an overwhelming compelling reason for doing so therefore our philosophy is to produce all content locally.

The philosophy for Dunedin FM (and for all Wireless Group stations) is to ensure relevance of all material to local residents within the broadcast area. We are mindful that this is a local licence and it is local content for Edinburgh and the surrounding areas and content which will give Dunedin FM its unique selling point in the marketplace.

In terms of speech-based formats, The Wireless Group is convinced that demand is as yet unsatisfied by commercial radio stations. It is our vision that Dunedin FM becomes the station that the people of Edinburgh turn to for their news and information whether they live in Leith, Morningside or Gorgie. As we know from our extensive research, current commercial radio services are lagging behind other media sources as the preferred point of reference for their news delivery. Dunedin FM intends to change this.

- (ii) The strategies that the applicant proposes to implement in regard to:
- catering for the tastes and interests, general or particular, of persons living in the area;
 - broadening the range of local commercial services available in the area;
 - the provision of local material, if any;
 - the proportion of locally-made programming, if any should be set out in this section

Catering for the tastes and interests of the population

1. Overall positioning strategy

Our research (summarised later in this document, see page 33) indicates that there will be a high demand for the Dunedin FM speech format as 53% of respondents from Edinburgh and the surrounding areas said that they would be “very likely” or “fairly likely” to listen. While research suggests that Dunedin FM will have a core listening audience of adults aged 40+, with a slight male and ABC1 bias, our strategy is to be broad and inclusive, offering something for all of the population at some time. As demonstrated in the attached programme schedule, Dunedin FM’s strategy will be populist, accessible, informative and local.

2. Catering for the tastes and interests of a fast growing demographic

Dunedin FM, as mentioned earlier, is expected to have a core listening audience of adults aged 40+ . The highest population growth is occurring within the older age market and our strategy will be to ensure that we provide programming which is relevant to that audience while not alienating the broad market. The population profile of the Dunedin FM TSA, as with other areas in the UK, is ageing. In 2001, 47% of the Edinburgh population was aged over 40 years old, whereas by 2016, towards the end of the licence period, this proportion will have increased to 53%¹

3. Programming strategy

The Dunedin FM format will be loosely based on the very successful ‘new breed’ speech radio from the US called ‘Progressive Radio.’ This format is embodied in radio stations such as ‘Liberal Talk’ and ‘Air America Radio’. Progressive radio is strong, reliable and informative news and current affairs based, presented in an entertaining and personable style. The format is speech based and reliant on strong local content in the form of news and current affairs, talkback and listener / audience participation. Dunedin FM would therefore present a new ‘listener friendly’, populist approach to broadcasting speech, by combining information and entertainment.

Our programming strategy will be to ensure editorial relevance through focusing on the issues, news and stories directly affecting those living within the TSA. Dunedin FM will be focused on Edinburgh and the surrounding areas covering the issues affecting the population living in the city itself, East and West Lothian and Fife. As indicated in Ofcom’s advertisement of the licence, the transmission area will broadly follow that of the existing commercial service. Forth One, which is home to 1.118 million adults aged 15+ and we have used this population as the basis for both our programming and financial projections.

Edinburgh, the capital of Scotland, is one of Europe’ s leading cities with a twenty-four hour lifestyle. It is our view, therefore, that Dunedin FM should mirror this by maintaining live presentation around the clock.

¹ (source CACI).

Our strategy to ensure our programmes are catering for the tastes and interests of those living throughout the Edinburgh area is influenced by our own research, and by the rising numbers (and widening spread) of the labour market. Rather than provide an Edinburgh-centric service, we will offer broad appeal across the region. Potential listeners will come from all over Edinburgh, the Lothians and Fife. With car ownership forecast to rise by 50%, what is happening in and around Edinburgh has relevance to the potential 100,000 commuters that Edinburgh will accommodate by 2015², ten years into the licence. The Lothian labour market already extends into Fife, the Scottish Borders, North and South Lanarkshire, Stirling and beyond. Consequently, there will be a greater dispersal of listeners who will have interest in news and information from all over the region, and not just news from the city of Edinburgh. This programming approach will also apply to features such as traffic and travel reports, weather and what's on. Our strategy will be to ensure provision of localised information that is relevant to our audience. As a result the Dunedin FM service will cover the whole area advertised, catering for the tastes and interests of the entire region, not just Edinburgh.

4. Strategy for news and information

No other independent local radio station in the area will have Dunedin FM's commitment towards speech. Dunedin FM's hallmark will be the quality of its news and information service relating to Edinburgh and the surrounding areas.

In order to ensure excellence of news coverage we will maintain a 24 hour news room, with a member of the news team present in the studio at all times to read the news live. The news team will be comprehensively staffed with an experienced News Editor, Sports Editor and four full time journalists and a full time trainee journalist. In addition, a significant budget has been set aside to give access to the Press Association's full Scottish news service. Further additional monies have been included in our plans for freelance journalist's local contributions from all corners of the TSA. National and international news material will be supplied by IRN for local compilation.

Dunedin FM will establish direct links with all Essential Services, Local Authorities and organisations to enable the free flow of information to listeners. Pursuing our interactive philosophy, listeners will be invited to contribute through "Listener hotline" telephone and text message services. Local interest groups, as highlighted elsewhere, will be informed of contact information to increase newsroom awareness of local issues and activities.

This holistic and interactive news strategy will create a virtuous cycle as these stories will be broadcast, increasing the relevance of Dunedin FM and encouraging more listener interaction. It will be the Dunedin FM strategy to ensure more in depth reporting of news stories and events from within Edinburgh and the surrounding areas are broadcast and that these stories flow into the wider programme content. It is interesting to note from our research that that BBC Radio Scotland comes low down the list of peoples' preferred media choice for local news with only 3.8% mentioning the station. This probably reflects the fact that Radio Scotland is a regional station and therefore dealing more with national Scottish issues with less news of direct relevance to Edinburgh people.

As demonstrated in our research, one in five people in the TSA felt that local news about their specific area was not covered enough by existing stations. Also "local news about your specific area" and "news covering Edinburgh and the surrounding areas" were two of the most popular news services demanded from the new station. "Up to date local Edinburgh news" was also the service that most people anticipated they would like about the new station. Dunedin FM will cater for this market gap through our well-resourced news team.

² Source: www.edinburgh.gov.uk

It was also apparent from our focus group research that listeners wanted a station that had more local information and local news stories. It will be part of our strategy for news that if a major story is breaking in and around Edinburgh that Dunedin FM will run with the story and our well staffed newsroom gives us the resource to do so.

5. Strategy to provide a platform for local and community issues

In order to cater for the tastes and interest of the population we will ensure that Dunedin FM creates strong links with the local communities and organizations. We know from our research that the most demanded type of news and information feature was current local and community issues. To cater for this demand, one of the presentation team at Dunedin FM will have specific responsibility as Communities Producer and will be the well publicised liaison and contact person for these organizations. In addition, it will be part of the Dunedin FM strategy to encourage interaction and interactivity with the audience through high quality and entertaining talkback radio debating the issues that affect local people.

6. Interact with and involve the audience

Building on The Wireless Group's experience and success in creating compelling talkback radio at a national level, Dunedin FM will encourage listeners to "have their say" through specific phone-in shows such as Nine 'til Noon, and Edinburgh Nights but also throughout the day's output where appropriate. We know from our research that Edinburgh people showed interest in listening to phone-in debates on topical local issues with almost 60% saying they would be "very likely" or "fairly likely" to listen or neutral. The number who are positive towards phone-ins rises within Dunedin FM's core target market therefore this type of programming will cater for broad tastes and interests of the audience.

7. Strategy for Training

Our presenters and producers will be trained to a high standard from the outset by experts drawn from The Wireless Group and the wider industry. Sampling of a radio station is never higher than in the crucial first few weeks and we are therefore determined to ensure Dunedin FM provides a high-calibre service from the start.

We have had initial conversations with Napier University and if successful in our application we would progress talks to set up a training academy based on the successful Academy scheme operated in other Wireless Group stations such as Wire (with the University of Manchester University honours degree course that is taught in Warrington.) The training scheme will help to encourage new entrants studying broadcasting to enter the industry in the exciting world of commercial speech radio.

Napier University currently has a School of Communication Arts, which runs an undergraduate and postgraduate course in Broadcast Journalism. We would establish a structured work experience programme giving students valuable experience in researching, producing, writing and presenting. In addition we would hope to integrate some elements of our training with teaching at the University.

In subsequent years we would hope to maintain a close working relationship with Napier University, to our mutual advantage in developing a future generation of radio practitioners. Dunedin FM staff will be available to train and help students on relevant courses and students will be offered regular work placements within the station.

Dunedin FM strategies to broaden choice

1. Offer a unique service that is not available from existing ILR services

The Dunedin FM format will be not only unique to local commercial radio in Edinburgh but unique to local commercial radio outside of London. Furthermore, the fact that 53% of respondents to our field research study said they'd be "very likely" or "fairly likely" to listen suggests that this is a format that the population want.

In order to ensure that our strategy of running a speech station would genuinely broaden choice in the region we examined, in detail, the formats of the existing ILR stations in the area (as outlined by Ofcom in the application document), namely Forth One, Forth 2, Beat and Real Radio. It is apparent that none of these four stations are providing the proposed Dunedin FM speech based format. To demonstrate this and further quantify the differences between our proposed service and those already available in the area we undertook detailed monitoring of the services identified by Ofcom for a period of sixteen hours on 7th July 2004.

From the monitoring undertaken, we first established that none of the existing stations available in the Edinburgh area offer anywhere near the level of speech of Dunedin FM (Table 4). The maximum speech to music ratio was 35% and this fell outside of daytime hours. Overall between 0600-2200 on the day monitored the highest average percentage of speech was on Real Radio with a 68:32 music speech balance. During the evening there is a much larger difference in the ratio of music to speech; the largest being an 88:12 split on Forth Two. Speech is therefore a medium that is not currently provided on the airwaves in Edinburgh.

Our strategy therefore is to provide a 95% to 5% speech / music split, at all times, to ensure Dunedin FM is broadening choice within the Edinburgh commercial radio market

Table 4: Summary of existing commercial radio output

	TOTAL DAYTIME 0600-1900		TOTAL EVENING 1900-2200	
	MUSIC %	SPEECH %	MUSIC %	SPEECH %
Beat 106	81	19	85	15
Forth One	70	30	79	21
Forth Two	72	28	88	12
Real Radio	65	35	82	18

2. Strategy to broaden the type of speech radio available

In order to ensure that the content Dunedin FM will provide significantly broadens choice we looked further at the "type" of speech provided in order to ensure that the Dunedin FM content will be markedly different. We found that the monitoring demonstrated that the quality of this speech tended towards less "meaningful" speech. By less meaningful we mean more presenter chat and links, promotional commentary with little real speech addressing news issues or information relating to the local community.

Table 5 below shows the average minutes per hour of "news speech", "sport speech" and "presentation speech". "Presentation speech" includes DJ chat between records, What's on information, serious editorial (relating to news items or informative features or discussions), fun editorial (addressing lighter topics) weather reads, competitions and travel news.

Table 5: Average minutes per hour allocated to speech ‘types’

	News	Sport	Present ation	promos & comps	DJ Chat	What's On	Serious Ed	Weather & Travel	Fun Editorial
Beat 106	1m 3s	18s	9m 15s	25%	45%	3%	0%	5%	22%
Forth one	3m 44s	39s	9m 56s	32%	18%	0%	3%	11%	36%
Forth 2	3m 55s	37s	9m 48s	24%	34%	3%	19%	16%	5%
Real Radio	4m 56s	59s	11m 52s	41%	21%	4%	7%	4%	14%

It is clear from the analysis that there is virtually no serious editorial speech within the existing local commercial station output monitored. As such the Dunedin FM proposition will clearly broaden choice. It will be Dunedin FM’s intention to broaden news coverage as highlighted in the programme schedule to offer more depth, coverage and discussion of the news as it breaks and build it into the main body of programmes.

Our strategy will be to provide the quality of local news and information which the population indicated there was a demand for in our original research.

As well as broadening listener choice by offering a unique speech format within the area, it will be our strategy to ensure that the quality of speech output, while being entertaining, is also more meaningful. This will be achieved through the input of our news team and our intention to employ a number of presenters with strong journalistic background and people who know and understand the issues affecting those within the TSA. (See separate confidential document for proposed presenters – Dunedin FM talent.doc)

3. Strategy to broaden news choice

The average news minutage per hour (across all stations monitored) was just under three and a half minutes (see Table 5 above). It will be Dunedin FM’s intention to broaden the depth of the news coverage as highlighted in the programme schedule to offer more depth, coverage and discussion of the news as it breaks. As well as half hourly bulletins during breakfast and drive time and headlines on the quarter hour, news bulletins will run at least hourly in other times and extended 15 minute news bulletins will run twice each weekday at 1300 and 1800 in order to broaden listener choice. In addition, much of the serious news content broadcast on existing stations was broadcast during peak time – Dunedin FM will look to offer in depth news coverage at all times of the day including live news 24 hours a day.

One of the key findings to emerge from our field research study was that local news about “their specific area” and “news covering all of Edinburgh, Lothian and Fife” were the two top news slots perceived as not currently existing within existing local commercial radio stations. Our monitoring confirms that this requirement is not being met by the existing ILR services.

Within the monitoring we looked at the incidences and mentions of news stories relating to the immediate catchment area between 0600-1900 and found the following:

Beat 106	Of 53 news stories monitored, only one related to Edinburgh and the surrounding licence area. No business news monitored. There was a lack of depth on sport covering only football stories with a Rangers/Celtic bias.
Forth One	Of 98 news stories monitored only 16 related to Edinburgh and the surrounding area. No business news. No What's on features.
Forth 2	Of 91 news stories, only 14 related to Edinburgh and the surrounding areas. No business news stories. Two What's on slots in the 7am and 3pm hour
Real Radio	Of 89 news stories monitored, none related to Edinburgh and the surrounding area. With the exception of the two Real Jobs action slot, no other community information was broadcast.

It is our view that local news and stories relating to Edinburgh and the surrounding areas are not well provided for by the existing local commercial services. Our strategy will be to direct our news operation to ensure that what is happening in and around the Edinburgh area is being reported on Dunedin FM. We will also include business news reports three times per day to help to attract an ABC1 audience to the breakfast and drive time shows.

4. Strategy to broaden sports coverage

The maximum of 59 seconds of daytime sports coverage per hour provided by current commercial stations is wholly inadequate in an area where interest in sports is high (as established by our original research (the results of which are set out later in this document – see page 33). Although average sports output per hour was higher during peak hours on stations such as Real, on Forth One for example there was little sports news carried outside of peak hours with the exception of a lunchtime bulletin. Dunedin FM's strategy will be to provide more in depth coverage, particularly of local teams. This will be achieved with a dedicated sports reporter and a well staffed news team, will provide more sports news and updates 24 hours a day in order to really broaden listener choice. Our strategy is to become the number one destination for news and sport on the radio.

In addition, the "East Coast Sports Show" will be a half hour show every evening at 1930 that will cover off all breaking sports news, studio discussion, guests and phone views from listeners. We have allocated a budget for purchase of live sports rights. Although Scottish Premier League rights are exclusively with BBC Radio Scotland, Dunedin FM would envisage purchase of some live sports rights to cover local teams in other competitions and if successful in our application would open discussion with the relevant parties.

5. Strategy to ensure relevance to the people of the Edinburgh area

Traffic and travel bulletins reporting what is happening locally were identified by 48% of our original research sample as an information service they want to hear. Our monitoring however identified that much of the traffic and travel related to major routes and roads, and not to what was happening in the local streets and roads. Indeed, one comment from the focus group research suggested that the existing stations' focus on the same known trouble spots (e.g. The Forth Road bridge) every day, made existing travel bulletins "boring".

Our strategy will be to use the services of trafficlink, supplemented by more localized information (for example by pursuing a link with Edinburgh's largest taxi company (Central Cars) to establish a network of "trouble shooting" cabbies on the road) to provide really local and up-to-the-minute information. We will also encourage listeners to contact our "Jam Line" to inform the stations listeners of local trouble spots.

With exception of Radio Forth One and Forth 2, which run Action Line and Life Matters slots, community information was at a premium. Yet this was one of the key features that respondents to the field research wanted to hear (42% of the sample). Consequently, Dunedin FM will have one member of the presentation team allocated responsibility as communities producer and encourage greater interaction with organisations and individuals rather than providing short slots thereby filling demand and broadening choice.

(iii) If appropriate, the applicant may also provide a typical programme-by-programme weekday schedule, to give a flavour for the direction of the station.

WEEKDAYS	
Programme	Presentation Style
<p>05:00 HEADLINERS <i>An early morning "fix" of News, Sport, Travel and Weather</i></p> <ul style="list-style-type: none"> ❖ A review of the best features from the day's out put, plus the 'Headliners' as we review what the papers say. 	
<p>06:00 GOOD MORNING EDINBURGH <i>News, Sport, and information, current affairs with comment, debate and plenty of humour, plus frequent traffic, travel and weather with a strong emphasis on 'local'.</i></p> <ul style="list-style-type: none"> ❖ Combing news affecting Edinburgh, Lothians, Fife and the rest of Scotland with the top stories from around the world. ❖ Three minute bulletins every 30 minutes. ❖ Headline up dates on the quarter hour ❖ Studio guests and live links with editorial and debates on the big issues effecting Edinburgh, Lothian, Fife and the rest of the world. ❖ At 6.40 and 7.40am 'Front Page' would look at, and give comment on the big stories in local newspapers, while 'Newsmakers' speaks to the people making the news. ❖ At 7.50am, 'Peep at Parliament' covers all the issues in the Scottish Executive. ❖ Business News with bulletins at around 6.15 and 7.15 am ❖ Traffic and Travel updates covering the key hotspots and road works every 20 minutes. ❖ Our "sports champion" comes to grips with all the local, national and international sporting news. ❖ 'Watched' is a humorous look at TV. ❖ 'Atlantic Crossing' updates all the Hollywood showbiz gossip ❖ Regular fun benchmark competitions. 	<p>The Good Morning Edinburgh Team will comprise of two main presenters. One will be from a journalistic background with solid experience in news and broadcasting while the other is from an entertainment background. They have a strong rapport and are skilled at ad-libbing around the main issues.</p> <p>The style will be smart, funny, thought provoking and occasionally controversial. With a strong news editorial and a witty, intelligent, satirical entertainment base this show will feature fun and entertainment equally with news and information.</p> <p>Local issues combined with lifestyle entertainment and fun will be the mainstay of this programme.</p> <p>Specialist contributors will provide sport news, showbiz gossip, website of the day and other entertainment features.</p> <p>Traffic updates will combine trafflink, and taxi reports with listener input.</p>
<p>9:00 NINE 'TIL NOON <i>'Classic Talkback' through the morning</i></p> <ul style="list-style-type: none"> ❖ A lively debate and phone-in of the issues that make the news affecting the local area. ❖ There will be rolling subject matter every hour that sets the agenda for argument/ discussion ❖ The latest news, finance and traffic up-dates every hour. ❖ Entertainment is the basis of this programme. 	<p>This show will mix 'Classic Talkback' with guest celebrities, polls and the issues affecting local listeners.</p> <p>Members of our team of specialist advisers and contributors will appear on a regular basis, some weekly - others less frequently.</p> <p>Weekly features including:</p> <ul style="list-style-type: none"> ❖ Monday 'Dr Feelgood' discusses health issues affecting our everyday lives. ❖ Tuesday 'Money Matters' covers the latest finance and how it affects our daily lives. ❖ Wednesday 'From the Bar' gives listeners the chance to discuss legal issues. ❖ Thursday 'Crime-Stoppers' has the latest news on local law issues. ❖ Friday – at look at all the weekend sports.

WEEKDAYS

Programme	Presentation Style
<p>12.00 THE AFTERNOON BLAST <i>Magazine Style Entertainment</i></p> <ul style="list-style-type: none"> ❖ 15 Minute Lunchtime News Round-up at 1300 ❖ Studio guests, celebrities and entertainers who are either from, or visiting Edinburgh, or so hot we've just got to have them. ❖ The show will feature games like 'Bad Boy Stories', competitions, quizzes and lots of prize give-aways, and of course, fun. 	<p>A change of pace, <i>The Afternoon Blast</i> is a funny and laid back magazine show in the style of Fred Macaulay.</p> <p>This show will incorporate light-hearted entertainment, humour and fun featuring special guests and contributors from various backgrounds.</p>
<p>15.00 DUNEDIN DRIVE <i>News, features, chat and fun through to go you home</i></p> <ul style="list-style-type: none"> ❖ News bulletins every 30 minutes featuring news affecting Edinburgh, Lothians, Fife and the rest of Scotland with the top stories from around the world. ❖ Traffic and travel every 20 minutes. ❖ Competitions and quizzes ❖ This highly interactive show will discuss the issues which are affecting life in the city and the Lothians. ❖ A more in-depth 15 minute news bulletin will be heard at 1800. incorporating business, sport and entertainment <hr style="border-top: 1px dashed black;"/> <p>18:30 East Coast Sports Show (during football season) <i>Detailed 30- Minute Evening Sports Round-up with drive time presenter</i></p> <ul style="list-style-type: none"> ❖ Edinburgh listeners will get all the news from Hibs, Hearts Livingston, Dunfermline + all the old Firm breaking stories. There will be regular guests, old and new, on the phones and in the studio giving their opinions and views on local, national and international sport. 	<p>This double header will feature an experienced presenter plus the news team.</p> <p>It will combine fun and entertaining radio with all the news and issues of the day.</p> <p>Will include some tongue in cheek humour</p> <hr style="border-top: 1px dashed black;"/> <p>Presented with a fresh, fun attitude towards sport featuring local news and teams and interaction with the fans.</p>
<p>19:00 M8</p> <ul style="list-style-type: none"> ❖ The evening show is designed to offer broad entertainment appeal ❖ What's on in Edinburgh, Lothians, Fife and the rest of Scotland. ❖ 'The Screen' will review film and TV. ❖ 'On The Fringe' will feature established comedy performers as well as giving new Edinburgh artists the chance to showcase their talent, everything from stand up to school talent. ❖ Music news, latest releases and the pubs and clubs will be reviewed. 	<p>This programme will feature a fun presenter with a strong background in entertainment and comedy speech, lifestyle and entertainment presentation styles.</p> <p>It will feature regular contributors specialising in entertainment and leisure.</p>
<p>22:00 EDINBURGH NIGHTS</p> <ul style="list-style-type: none"> ❖ Through the eyes of our larger than life Scottish legend the world is a different place. ❖ Issues and views are more extreme and comments are livelier. ❖ Editorial, observations and interactive reactions. ❖ Classic talkback radio appealing on many levels 	<p>Nothing will be sacred as he brings life to night time radio with hot topics, engaging listener interaction and irreverent entertainment.</p> <p>Live and dangerous</p>

WEEKDAYS

Programme	Presentation Style
<p>02:00 REPLAY <i>The Best of Yesterday's Programmes</i></p> <ul style="list-style-type: none">❖ Another chance to hear the highlights of yesterday on Dunedin FM❖ The best of the interviews and features❖ Live news and updates throughout the night	<p>Automated output with live presentation incorporating live continuity announcements news and short information for the needs of the overnight audience</p>

Weekends

Weekend highlights would include a strongly personality led Sunday Morning show encapsulating the weekend flavour involving the audience interactively and reflecting on the week gone by and the seven days to come.

On Saturdays a flagship offering will be Sportstalk – soundtrack to Scottish Premiership and other local sports events. This is driven by a strong personality presenter with competitions, phone-ins, and score updates and results.

(b) Proposed Format

A blank Format is attached at Appendix 3. Fill it in, ensuring that each of the following criteria are addressed within, where it is felt appropriate to do so. It should follow the style of Ofcom Formats, which can be viewed at: www.ofcom.org.uk/static/radiolicensing/amfm/analogue-main. Reasons for omission of any particular criteria (and it is accepted that not all criteria will be relevant to all applications) should be set out separately. The Format will form part of the licence. Therefore, questions of clarification may be asked prior to licence award and the wording amended to reflect this, if necessary.

- (a) Station Name (working titles accepted);
- (b) Service Duration. This is the number of hours you will broadcast each day. It should also include the maximum extent to which you plan to automate programming, or the minimum level of live presentation (daytime/non-daytime).
- (c) Locally-made programming. The level and type of locally-made programming (i.e. programming made within the licence area) promised. It should also reflect a likely level of networked/syndicated material, and news-gathering arrangements.
- (d) Character of Service. This is a clear, one or two sentence, description of the output and target audience.
- (e) Detail. This should address, where appropriate:
 - A clear description of the type/range of music.
 - Specialist music programmes
 - A level of speech content (peak/non-peak)
 - Any specific plans for local material
 - News obligations, local and national (weekdays and weekends, peak-time, non-peak, etc.)
 - Other character-defining elements of programming.

DUNEDIN FM STATION FORMAT

Licence Outline

Station Name	Dunedin FM
Licence Area	Edinburgh and the surrounding area (as defined in the Radio Authority's Measured Coverage Area map)
Frequency	107.0 MHz
Service Duration	Dunedin FM will be locally produced and presented live 24 hours a day

Definitions

Speech	"Speech" excludes advertising, programme/promotional trails & sponsor credits, and may be calculated across daytime or non-daytime
Peaktime(s)	"Peaktime(s)" refers to Weekday Breakfast and Afternoon Drivetime output, and Weekend Late Breakfast.
Daytime	"Daytime" refers to 0600 to 1900 weekdays, and weekend output from 0800 to 1400.
Locally produced/presented	Production and presentation from within the licence area. All requirements for locally produced/presented output must include peaktime.

Character of Service

A SPEECH BASED LOCAL STATION WITH A STRONG COMMITMENT TO NEWS, INFORMATION AND TALKBACK DEBATE FOR EDINBURGH AND THE SURROUNDING AREAS WITH COMPREHENSIVE LOCAL, SCOTTISH, UK AND INTERNATIONAL NEWS AND INFORMATION

Detail

Dunedin FM will be locally produced and presented live 24 hours a day. Speech will not fall below 95% of the output across 24 hours and will cater for the tastes and interests of listeners in the area. Content will include relevant local traffic, travel, weather, sports news, what's-on and community information. Local news for Edinburgh and the surrounding areas is a vital ingredient of the station and will be broadcast at least hourly, 24 hours a day. During breakfast and drive time, bulletins will feature every half hour with headline up dates on the quarter hour. At other times local news will feature at least hourly. The news desk will be manned 24 hours a day and live news presentation will continue round the clock. At least two weekday daytime news bulletins will be around 15 minutes in duration. At weekends local news will be carried hourly.

The service will be characterised by lively and entertaining phone-ins and debates on the important issues for the catchment area that will bring together and reflect diversity of opinion across the TSA. Any music used will be primarily incidental or for illustrative purposes.

We would wish to reserve the right to carry a nominal amount (no more than 6 hours per week) of syndicated/network programming although at the time of licence application there are no plans to do so.

SECTION 105(D): EVIDENCE OF LOCAL DEMAND OR SUPPORT

(a) Evidence of Demand

This section should provide an analysis of the reasons as to why it is considered that there is a demand for the type of service proposed, with reference to the size and nature of the proposed target audience. If original market research has been undertaken, please provide the following information:

Market Research

The Wireless Group undertook a four-stage research project in preparing the application for the Edinburgh licence:

1. Desk research to identify listening gaps in the market, define the size of the market for existing speech radio, listening and demographic trends within the TSA
2. Reach and Demand Study to establish the likely size of the market for the Dunedin FM proposition
3. Focus Group Research – to fine tune and refine the programme schedule

Stage 1 Establishing the Market Size and profiles for Speech Radio in Edinburgh Speech Radio

In preparation for the recommencement of the FM licensing timetable, in November 2003 The Wireless Group commissioned Hallett Arendt to conduct a desk research project examining the current listening patterns towards speech radio at both the national level and across selected major Metropolitan and regional licence areas, including Edinburgh.

The key objectives of the research were to determine the size of the speech radio market, examine existing trends and profiles in speech radio listening using RAJAR analysis and to identify market gaps at both the national and selected regional / Metropolitan levels. The research was conducted using RAJAR data from 2000 through Q4 2003. Analysis was provided by Hallett Arendt and the results presented to The Wireless Group in March 2004.

Speech radio listening was defined as listening to Radio 4, Radio 5, talkSPORT and BBC Local and Regional services and LBC/News Direct. Nationally, as reported in the document sent to Ofcom in May 2004, the research demonstrated that speech radio has the highest market share of any radio format and yet little of this listening occurs within the commercial sector.

The study was also undertaken for listening within the Edinburgh TSA to establish current listening to speech radio stations. A national picture for speech radio listening is broadly replicated at the local level within the Edinburgh TSA. The research demonstrated that in Edinburgh:

- Core listeners to the existing speech services available in the Edinburgh TSA are adults aged 45+. However, typically, one third of speech radio listeners are aged 15-44 with the highest proportion tuning in between 1800-2100. Broadly, this confirms other Wireless Group research that suggests speech appeals to an older audience
- In terms of profile, speech radio listeners in the Edinburgh TSA are much more likely to be male (60%), aged 45+ (57.6%) and in the ABC1 social class group (63%). This broadly reflects the overall picture at a national level.
- Compared to the national picture, the Edinburgh TSA has a very high % of people who say they never listen to the radio (13.7% vs 9.1%) an index of 151.

- The population in the Edinburgh TSA is ageing. In 2000, 46.2% of the population was aged over 45, whereas by Q4 2003 this had risen to 48.6%. This is marginally behind the UK average but growing at a faster rate. As highlighted above, with the market for speech radio tending to be biased towards the older population, this makes Edinburgh a key target market for a new speech radio service.
- Speech listening accounts for over one fifth of all time spent listening to the radio within the Edinburgh TSA but the commercial sector accounts for only 1.4% of this listening. This demonstrates a demand for the speech format which is, as yet, unfulfilled by the local commercial sector.
- Over one third of the Edinburgh TSA population include a speech station within their repertoires therefore the population clearly enjoy speech radio formats.
- 6.4% of the population (one in every fifteen) only listens to speech radio and a high 43.3% of speech radio listeners only listen for less than 6 hours per week, compared to 14.5% of all radio listeners.
- Speech radio accounts for 27.7% of all ABC 1 listening hours in the Edinburgh TSA compared to 14.5% of C2DE listening hours, so it should be an attractive commercial proposition for advertisers.

A full copy of the tables from this research is included in Appendix 3. All Ofcom radio committee members already have a copy of the broader national report into the speech radio market. Further copies of the full report are available on request.

Stage 2 Quantifying The Demand For A Speech Radio Service In The Edinburgh Marketplace

In order to quantify the level of demand for our proposed service – Dunedin FM – we commissioned an independent survey designed to quantify the potential listening audience for our proposition, provide information on existing radio listening, the future requirements of the adult population and identify demand in the market for proposed features. Key objectives of the survey were:

- *Establish whether or not there was a demand for a speech based radio station in the Edinburgh area.*
- *Identify the needs of radio listeners and quantify the degree to which they are being catered for by the existing commercial radio stations received in the Edinburgh area.*
- *Test reaction to the speech radio station format and quantify likely reach and weight of listening.*
- *Identify the core target listening audience*
- *Gain a detailed picture of the demand for speech radio and types of features demanded.*
- *To ensure that the speech proposition will genuinely broaden choice and cater for the tastes and interests of the population.*

Specific questions the research sought to answer included:

- *Existing radio listening*
- *Opinion on news coverage from existing radio stations*
- *Rating of speech/presenter led radio programmes*
- *Views of speech listening*
- *Views on phone-in debates*
- *Interest in hearing specific features/topics and perceived availability on local commercial radio stations*
- *Media source identified as most relied on for local news coverage*
- *Types of news service wanted on a new radio station*
- *Frequency of news bulletins*
- *Interest in hearing specific information services and perceived availability on local commercial radio stations*
- *Likelihood of listening to proposed service*
- *What would be like about the new station*
- *Place for new station in repertoire*
- *Effect of new station on existing listening patterns*
- *Weight and frequency of listening to new station*
- *What features would attract “unlikely” listeners to listen*

The research was conducted by First Surveys Research. Formed in 1989, First Surveys is a national full service market research organisation specialising in qualitative and quantitative research. Based in Blackpool they combine considerable experience in radio research with intimate knowledge of the region.

The proposed TSA for the service was defined as similar to Forth One, as specified by Ofcom application guidelines. Respondents were shown a map show card upon which the boundary of the TSA was outlined. Recruitment into the study was based on respondents claiming to live within the outlined boundary area. Fieldwork was conducted between Monday 9th August and Sunday 15th August 2004. 100% editing procedures were conducted on all completed questionnaires. Quality control back checking procedures were conducted in line with BMRA/Market Research Society Codes of Conduct. All First Survey interviewers conducting the fieldwork had been trained to the highest standards recognised within the market research industry and held a minimum of two years experience in the field. Interviewers were in possession of the current year's Market Research Society Interviewer Identity Card bearing the First Surveys logo. First Surveys is a member of BMRA, AQR, IID.

First Surveys was commissioned to conduct and administer the fieldwork research on a quota sample of 600 adults (aged 15+) residing within Edinburgh and the surrounding areas. To ensure respondent recruitment was representative, quotas were set by age and gender for the proposed TSA based on the Edinburgh population profile published by RAJAR. To ensure that opinion was tested throughout the TSA a five-sectored grid was superimposed on a boundary map of the TSA. Each grid sector was nominated as a sample point and interviews conducted "in home" in these sample point areas, broadly in proportion to population density.

The summary of the research findings were as follows:

Quantifying the overall demand for Dunedin FM

- Respondents to the quantitative research study were read a concept card outlining the proposed speech format of Dunedin FM and they were asked to say how likely they were to listen. A massive 53% stated that they would be "very likely" or "fairly likely" to listen, with a further 8% remaining neutral. Overall, this demonstrates a high demand for this type of station in the Edinburgh area.
- Translated into expected reach and hours, the research figures would suggest that in Year 1 this demand would be translated into a station that would achieve 14.0% weekly reach with 8.9 weekly hours. For the purposes of business modelling we have adopted a more cautious approach as reflected in the financial assumptions section of this application.
- That strong demand exists for the station, was highlighted further when we asked respondents who had said they were "very likely", "fairly likely" to listen to the station or neutral, where they would position the station in their listening repertoire. We were encouraged that overall, the station is likely to be the second choice amongst the potential audience and the mean scores rise as the population gets older.

Conclusions on attitudes towards speech radio programming

- We examined attitudes towards "speech" programming. One third of the respondents agreed that "they don't categorise their listening" and that "if someone is talking about a subject that I find interesting I will stay tuned and listen". The percentage agreeing with this statement rose by age, with 45+ adults being 25% more likely to agree. Similarly, while 9% of all respondents agreed with the statement that "I prefer listening to interesting or amusing speech programmes than to music on the radio" the older age range (45+) were 61% more likely to agree with this statement.

Demand for speech radio features

- We looked at the demand for various features and items that may be broadcast on a speech station. Particularly given that we were testing the concept of high levels of “talkback” radio, the response to listening to radio phone-ins/debates on topical issues gave a clear indication of demand. 42% of the base said they were “very interested” or “fairly interested” in hearing radio phone-in debates with a further 17% “neutral”. As the age of respondent increases the percentage agreeing with the statement rises to 48% who say they would be “very likely” or “fairly likely” to listen.
- We established the demand for the types of news, information and features that people want to listen to on the radio and also further correlated that demand to the perception of whether they are currently available. The top features requested were:

Current local/community issues	42%
Football Results	38%
Live sports and commentary	38%
Quizzes and competitions`	35%
Film, Video, Theatre and Art Reviews	33%
Crime Stoppers Info and advice	29%
Consumer watchdog programmes	29%
Motoring News and Views	26%
Health and Fitness Advice	25%
Current Affairs with local & national issues	22%

Amongst the older age group demand for topics such as Current local/Community issues (48%) Current Affairs, (28%) coverage of the Scottish Parliament (25%), interviews and debates with leading public figures (22%), consumer advice (38%) and crime stoppers (38%) all rise. Therefore against the core audience of 40+ adults, these types of programming and features will be important to success.

Full details of responses are available to Ofcom on request, however with the exception of Football Results, Live Sports Commentary and Coverage, Quizzes and Competitions, demand for these far exceeds supply for the items tested, indicating that the local commercial stations currently available are not meeting the speech programming needs of the residents of the Edinburgh TSA.

Demand for news coverage

- In terms of news coverage, we identified that local commercial radio (and radio in general) in Edinburgh is lagging well behind other media sources as being the preferred point of reference for local news delivery. Only 8.7% of respondents said they would turn to a local commercial radio station to obtain news on what’s happening in and around Edinburgh and the surrounding areas. Significantly, only 3.8% said they would turn to BBC Radio Scotland reflecting the more “national Scottish” approach of that station and lack of Edinburgh focus.
- Excluding “favourite stations” (which tends to incur a subconscious bias to justify personal choice), we asked respondents to indicate which of the current stations they considered gave them very good coverage and information relating to Edinburgh and the surrounding areas. 36% of the base stated that none of the available stations provided this. Forth 2 and Real Radio with their higher speech based content only recorded scores of 8% and 5% respectively. Radio Scotland was also low at 7% reflecting a lack of Edinburgh focus.

- Using the same filter as previously, 39% of respondents stated that none of the currently available stations cover items of personal interest to them suggesting an unfulfilled gap in the market.
- Again using the same filter as above, we asked which radio station the respondents would turn to if a major news story were breaking. 37% said they would not listen to any of the currently available stations. This indicates that there is a need for a more authoritative, locally focussed news and information service that is relevant to the tastes and interests of the residents of the Edinburgh TSA.
- Respondents were asked what sort of news coverage they would want from a new radio station were it broadcasting and then asked if they felt it was currently available. The most popular news services demanded would be those with a mix of local national and international news (54%) followed by local news about your specific area (52%) and news covering Edinburgh and the surrounding areas (43%).
- But more critically in terms of broadening choice, one in five respondents felt that “local news about their specific area“ was not available or covered enough currently indicating a clear market gap. Similarly 11% of respondents (2nd highest score) felt that “News covering Edinburgh and the surrounding areas was not covered enough currently”. Scores were generally higher on all news items from the ABC1 and older adult respondents with business news and Scottish parliament news commanding higher scores in terms of demand and yet not covered enough.
- This demand for more news about Edinburgh and the surrounding areas is further supported when those who indicated they might listen to the station were asked what they anticipated they would like about it. By far the highest response (30%) was for “Up to date local Edinburgh news” followed by “local information on events” (15%) and “debates on local issues” (13%).
- We asked about the type of news service preferred. 42% of respondents wanted short bulletins on the hour with 29% wanting bulletins on the hour but with more depth than other stations. Amongst older adults and the ABC1s, there is stronger preference for bulletins on the hour but with more depth than other stations.
- Respondents were asked to indicate which information items they would like to hear on a new radio station, and which they felt were insufficiently covered by local commercial radio stations. The top 5 highest demanded features were:
 - 24 hour local weather (53%)
 - Local traffic and travel with key hot spots and road-works (48%)
 - What’s on local guide (38%)
 - Long range (3 day) weather reports (36%)
 - Public Transport Information (32%)

Of these, What’s On Local Guide (23%) and Public Transport Information (19%) ranked highest in terms of perceived unavailability through the existing local radio commercial services. Although travel information on Motorways and major road links had reasonable demand (28%) it also had low perceived unavailability (6%).
- Overall, the demand for features was evenly spread from both male and females, the exception being features relating to sport and motoring.

Full data tables and a summary report are attached in Appendix 3.

Stage 3 Focus Group Research

As part of our research programme, the Wireless Group commissioned Keith Gorton Associates to undertake focus group research within Edinburgh to probe and further develop some of the themes arising from the reach study undertaken. Keith Gorton Associates have over 25 years experience in research and have MRQSA (BS 7911) accreditation. Two focus groups were conducted on 2nd September 2004 each of 90 minutes duration. One group consisted of six respondents, all of who were regular speech radio listeners. Nine respondents attended the second group and were occasional speech listeners. Both group were recruited to represent a 40+ age profile

A full copy of both the topic guide for the focus group research plus a full report on the findings is available to Ofcom on request. Below is a summary of the observations acquired and which have helped us to refine the speech programme schedule that caters for the tastes and interests of the population.

News and Information

Local, local, local. Listeners are demanding more local information. They all consider the current radio stations put too much emphasis on the big stories at national levels. They feel local stories should be expanded.

It was a clear theme of the focus groups that potential listeners want a radio station that covers issues that affect local people, local stories, and is part of the community. This is reflected in comments such as *“It would be nice to have more local stories; the local paper is the only place you can get it.”* and *“You don’t really get to hear about local news on the radio, you only hear about the big stories”*.

Phone-ins

Cover issues affecting local lives. Cover local issues and be part of the community. They should focus on more serious issues rather than just celebrity. The presenter is key to success. Edinburgh listeners feel that phone-ins requires more local content, again with issues affecting their lives. These phone-ins should also range from the serious to the light-hearted.

Presenters

The presenters and presentation style is a major factor for Edinburgh listeners in that for news readers and serious topics they want someone who is informative, knowledgeable and can expand the topic. Similarly they want their presenters to be witty and entertaining. And there is a desire for presenters to be involved with and reflect the area they broadcast to.

Sport

It has long been the bane of many non “Old Firm” supporters that football coverage in the media whether on TV, radio, press or otherwise tends to be dominated by Celtic and Rangers and this was reflected in our focus groups. *“Please give us more than just the big clubs, Celtic, Rangers, etc. We want local clubs with local fans and local issues. The reporting should be more balanced and unbiased.”* There was also a feeling that a local speech radio station should cover local sport, not just football. This coverage should also be unbiased and the host should be knowledgeable.

Features

More lifestyle programmes. Health and Fitness issues, tips on general health and women's features. The emphasis should be placed on local events, entertainment and reviews, etc. We also identified from the focus groups that listeners feel there is no radio station that gives them local entertainment news. The view was that this came from the local press but not radio "*The papers review local entertainment but there's not much on the radio, they just review your main events. Make it more local, you don't really know what events are being held by local groups and societies*". These comments are consistent with our findings elsewhere that there is a demand for What's On information but it is currently unfulfilled by the existing commercial radio stations.

Commercials

"We want fewer commercials in a break. Use better, more creative commercials and make them humorous with more variety."

Traffic and Travel

Traffic and travel was another issue Edinburgh listeners felt did not cover the local problems affecting them. A revealing quote was: "*It's the same thing they're telling you every morning, you already know which roads are going to be busy... Forth Road Bridge, the A1...we already know!*" We perceived a desire for much more localised travel reports rather than the major road reporting that we picked up in our competitive station monitoring. And during rush hour every fifteen minutes during peak period and good reports at the weekend.

Programming Styles

As part of the focus group discussion we asked about presentation style for the different programmes. During Breakfast and morning shows they want funny entertaining morning show that is appropriate for that time of the day. Topical features and discussion. Lighter subjects to make it more appealing. More information on Edinburgh events and local happenings like the theatre. It was felt that the early afternoon show should be more uplifting and cheerful. At drive time the groups wanted a much lighter show with focus on entertainment. In the evenings they felt that the station could be much more irreverent and more tongue-in-cheek / light hearted.

(b) Evidence of Support

As requested by Ofcom, we have included selected letters of support for the Dunedin FM proposition that cover a broad range of organisations, people and advertisers and their agencies.

Copies of these letters are attached in a separate document (Dunedin FM support letters.pdf).

DECLARATION

Applicants are required to conclude their submission by responding to the following question:

Do you confirm that, to the best of your knowledge and belief:

(i) the applicant is not a disqualified person in relation to the licence by virtue of the provisions of section 143(5) of the Broadcasting Act 1996 (relating to political objects);

(ii) no director or person concerned directly or indirectly in the management of the company or the applicant group is the subject of a disqualification order as defined by section 145(1) of the Broadcasting Act 1996;

(iii) no person involved in the application has been convicted within the past five years of an unlicensed broadcasting offence and that the applicant will do all it can to ensure that no person so convicted will be concerned in the provision of the service, the making of programmes included in it, or the operation of a radio station if the applicant is granted a licence; and

(iv) any matters which might influence Ofcom's judgement as to whether the directors and substantial shareholders involved in the application are fit and proper persons to participate in a radio licence have been made known to Ofcom?

Applicants should note that Ofcom reserves the right to revoke a licence if at any time any material statement made is found to be false and to have been made by the applicant or any member or officer thereof knowing it to be false, and that in the circumstances of section 144 of the Broadcasting Act 1996, the provision of false information or the withholding of relevant information with the intention of misleading Ofcom could incur a criminal conviction and a disqualification from the holding of a licence.

The directors of Dunedin FM Limited confirm the above points and certify that all directors of the company are considered fit and proper persons to participate in a radio licence.

Appendix 1: Dunedin FM certificate of incorporation

File Copy



**CERTIFICATE OF INCORPORATION
OF A PRIVATE LIMITED COMPANY**

Company No. 271956

The Registrar of Companies for Scotland hereby certifies that
DUNEDIN FM LIMITED

is this day incorporated under the Companies Act 1985 as a private
company and that the company is limited.

Given at Companies House, Edinburgh, the 13th August 2004



NSC271956K



Companies House
— for the record —

The above information was communicated in non-legible form and authenticated by the
Registrar of Companies under section 710A of the Companies Act 1985

Appendix 2: Confirmation of funding from The Wireless Group plc



The Wireless Group plc
18 Hatfields
London
SE1 8DJ
Telephone: 020 7959 7900
Fax: 020 7959 7802

23rd September 2004

Neil Stock
Head of Radio Planning & Licensing
Ofcom
Riverside House
2a Southwark Bridge Road
London
SE1 9HA

Dear Neil

Re: Edinburgh FM licence application

This letter confirms that in the event that the FM ILR licence for Edinburgh is awarded to Dunedin FM Limited, then The Wireless Group plc will fully fund the company up to an amount of £2,000,000.

You will note from both the latest full year accounts of The Wireless Group plc, plus the interim accounts to 30 June 2004, that The Wireless Group continues to trade very strongly, with profits for the six months to 30 June 2004 reaching record levels. Cash generation also remains robust and as at September 2004 the group had undrawn committed bank facilities of £6 million.

I trust this confirmation will give you the comfort you require under Section 2.(e) of the Edinburgh FM licence application.

Yours sincerely

Keith Sadler
Chief Financial Officer and Company Secretary

Appendix 3: “The Case for Speech Radio” – A desk research report in the Edinburgh TSA. Prepared for The Wireless Group by Hallett Arendt (March 2004)

Key Conclusions

- The population in the Edinburgh TSA is ageing. 30.2% of the population in the Year 2000 were aged over 55, whereas by Quarter 4 2003, this had risen to 32.1%.
- Radio listeners would also appear to be listening for longer, with the proportion of All Radio listeners who listen more than 25 hours per week (31.8%) higher than the preceding three years.
- Speech accounts for 20.5% of all listening hours in the Edinburgh TSA.
- 6.4% of the Edinburgh TSA only listen to speech stations, those only listening BBC Scotland accounting for 2.6%.
- Speech Radio listeners in the Edinburgh TSA are much more likely to be male (60%), aged 45 plus (57.6%) and in the ABC1 social class group (62.6%).
- A high 43.3% of Speech Radio listeners only listen for less than 6 hours per week, compared to 14.5% of All Radio listeners.
- The hours profile of Speech Radio listeners tells a similar story to the listeners profile with males, 45 pluses and ABC1’s dominating.
- Those adults listening to more than 13 hours per week account for nearly three-quarters (74%) of the total hours listened.
- Just over half of Speech Radio listeners listen to an ILR service, this figure rising to two-thirds when National Commercial services are included.
- However, Radio 4 listeners are much less likely to listen to the ILR services (33.8%) in the Edinburgh TSA, with only half of them listening when including National Commercial services.
- talkSPORT listeners are the most likely of the five groups listed to listen to an ILR service, with 63.2% of them claiming this.
- During Monday-Friday, typically one third of Speech Radio listeners are aged 15-44.
- The time segment 1800-2100 sees the highest proportion of 15-44 year olds (42.9%).
- At weekends, more than 40% of 15-44 year olds are listening to Speech Radio on Saturday 1500-1800 and 2100-2400 (both days).

Market Share by Demographic

	15-24	25-34	35-44	45-54	55+
Men					
Speech	3.4%	15.7%	21.1%	24.8%	37.6%
Nat. Comm.	8.2%	9.6%	12.2%	10.6%	12.0%
Women					
Speech	3.0%	7.8%	12.1%	13.9%	32.8%
Nat. Comm.	12.5%	8.3%	6.8%	13.5%	10.6%

Speech accounts for 27.7% of all ABC1 listening hours in the Edinburgh TSA, compared to 14.5% of C2DE listening hours.

Table 1: EDINBURGH POPULATION PROFILE TREND

	Year 2000	Year 2001	Year 2002	Q1 2003	Q2 2003	Q3 2003	Q4 2003
All Adults	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total Men	48.3%	48.3%	48.2%	48.2%	47.8%	47.8%	47.8%
15-24 Men	7.9%	8.0%	8.1%	8.0%	8.2%	8.0%	7.9%
25-34 Men	9.6%	9.3%	8.9%	8.9%	7.8%	7.8%	7.9%
35-44 Men	9.8%	9.7%	9.7%	9.9%	9.5%	9.2%	9.1%
45-54 Men	7.8%	7.9%	7.9%	7.7%	7.9%	8.2%	8.2%
55+ Men	13.2%	13.4%	13.6%	13.7%	14.3%	14.6%	14.6%
Total Women	51.7%	51.7%	51.8%	51.8%	52.2%	52.2%	52.2%
15-24 Women	7.4%	7.8%	7.9%	7.8%	7.8%	8.0%	8.1%
25-34 Women	9.6%	9.0%	8.8%	8.9%	8.7%	8.7%	8.7%
35-44 Women	9.6%	9.7%	9.8%	9.8%	9.8%	9.3%	9.7%
45-54 Women	8.2%	8.2%	8.0%	8.0%	8.2%	8.3%	8.3%
55+ Women	17.0%	17.0%	17.3%	17.3%	17.8%	18.0%	17.5%
ABC1 Adults	49.4%	46.5%	47.8%	47.8%	49.8%	49.6%	50.0%
C2DE Adults	50.6%	53.5%	52.2%	52.2%	50.2%	50.4%	50.0%

Listening To ALL Radio

NO Listening	11.6%	11.4%	13.8%	10.2%	10.8%	13.1%	13.7%
Ads List Under 6hrs	18.0%	14.8%	15.3%	13.3%	14.2%	16.1%	14.5%
Ads List 6-12 Hrs a Wk	16.1%	17.5%	17.3%	18.4%	17.4%	16.8%	16.4%
Ads List 13-24 Hrs a Wk	25.4%	25.0%	23.3%	26.6%	26.4%	24.0%	23.6%
Ads List 25-40 Hrs a Wk	16.5%	17.8%	16.7%	15.9%	15.5%	15.3%	16.3%
Ads List 40+ Hrs a Wk	12.3%	13.6%	13.7%	15.6%	15.7%	14.7%	15.5%

**Table 2: Speech Listeners As A Proportion Of The Total Population
EDINBURGH MARKET PLACE**

SPEECH STATUS - MARKET SHARE

	Year 2000	Year 2001	Year 2002	Q1 2003	Q2 2003	Q3 2003	Q4 2003
All Speech Listeners	23.3%	22.6%	21.8%	18.7%	21.4%	22.6%	20.5%
Only Listen to Speech Stations	6.7%	8.1%	6.9%	5.1%	6.0%	6.9%	6.1%
Only Listen to Radio 4	2.7%	1.9%	1.5%	1.3%	1.9%	2.0%	1.4%
Only Listen to BBC Scotland	2.0%	2.7%	1.4%	1.5%	1.7%	1.5%	2.0%
Only Listen to Radio 5 Live	0.6%	0.8%	0.8%	0.2%	0.6%	0.7%	0.3%
Only Listen to talkSPORT	0.1%	0.1%	0.2%	0.1%	0.2%	0.3%	0.2%

- Speech radio listeners account for around one fifth of all time spent listening to radio.

SPEECH STATUS - REACH % OF TOTAL POPULATION

	Year 2000	Year 2001	Year 2002	Q1 2003	Q2 2003	Q3 2003	Q4 2003
All Speech Listeners	37.9%	37.0%	36.6%	34.4%	36.9%	35.2%	33.1%
Only Listen to Speech Stations	7.7%	7.8%	7.2%	6.9%	7.4%	6.4%	6.4%
Only Listen to Radio 4	2.0%	1.6%	1.5%	1.7%	2.2%	1.9%	1.3%
Only Listen to BBC Scotland	3.6%	3.3%	2.30%	2.2%	2.5%	1.9%	2.6%
Only Listen to Radio 5 Live	0.9%	0.6%	0.9%	0.5%	0.7%	0.5%	0.3%
Only Listen to talkSPORT	0.2%	0.3%	0.4%	0.1%	0.2%	0.4%	0.3%

- One third of the population include a speech radio station in their repertoires.

Table 3: Profile Of Speech Radio Listeners
PROFILE OF SPEECH RADIO LISTENERS - REACH PROFILE %
EDINBURGH TSA - Q4 2003

	REACH PROFILE %	HOURS PROFILE %
All Adults	100.0%	100.0%
Total Men	60.0%	58.1%
15-24 Men	4.8%	1.1%
25-34 Men	8.4%	7.1%
35-44 Men	14.4%	11.0%
45-54 Men	11.4%	11.9%
55+ Men	21.0%	27.0%
Total Women	40.0%	41.9%
15-24 Women	3.1%	1.0%
25-34 Women	4.3%	2.9%
35-44 Women	7.5%	5.4%
45-54 Women	8.8%	5.5%
55+ Women	16.4%	27.2%
ABC1 Adults 6	2.6%	61.4%
C2DE Adults	37.4%	38.6%
Ads List Under 6hrs	43.3%	9.1%
Ads List 6-12 Hrs a Wk	23.3%	17.0%
Ads List 13-24 Hrs a Wk	18.5%	26.9%
Ads List 25-40 Hrs a Wk	9.9%	24.9%
Ads List 40+ Hrs a Wk	5.0%	22.2%

Table 3a Profile of BBC Speech with All ILR

EDINBURGH TSA - Quarter 4 2003

	BBC SPEECH	ALL ILR
All Adults	100.0%	100.0%
Total Men	59.8%	45.5%
15-24 Men	4.6%	9.6%
25-34 Men	8.4%	8.7%
35-44 Men	13.9%	8.8%
45-54 Men	11.6%	8.4%
55+ Men	21.3%	10.0%
Total Women	40.2%	54.5%
15-24 Women	2.8%	11.2%
25-34 Women	3.9%	10.0%
35-44 Women	7.6%	12.0%
45-54 Women	9.1%	8.6%
55+ Women	16.8%	12.6%
ABC1 Adults	63.1%	45.0%
C2DE Adults	36.9%	55.0%
Ads List Under 6hrs	45.2%	32.6%
Ads List 6-12 Hrs a Wk	21.9%	21.8%
Ads List 13-24 Hrs a Wk	18.7%	21.5%
Ads List 25-40 Hrs a Wk	9.6%	12.2%
Ads List 40+ Hrs a Wk	4.5%	12.0%

**Table 4: Audience Profile to Speech By Time Segment Under 45 v 45 Plus
EDINBURGH TSA
Q4 2003**

	Adults 15-44	Adults 45+
Mon-Fri 0600 - 0900	33.2%	66.8%
Mon-Fri 0900 - 1200	35.3%	64.7%
Mon-Fri 1200 - 1500	31.8%	68.2%
Mon-Fri 1500 - 1800	35.7%	64.3%
Mon-Fri 1800 - 2100	42.9%	57.1%
Mon-Fri 2100 - 2400	37.6%	62.4%
Mon-Fri 2400 - 0600	33.3%	66.7%
Sat 0600 - 0900	25.5%	74.5%
Sat 0900 - 1200	36.1%	63.9%
Sat 1200 - 1500	39.7%	60.3%
Sat 1500 - 1800	43.1%	56.9%
Sat 1800 - 2100	39.1%	60.9%
Sat 2100 - 2400	41.5%	58.5%
Sat 2400 - 0600	32.3%	67.7%
Sun 0600 - 0900	19.7%	80.3%
Sun 0900 - 1200	30.8%	69.2%
Sun 1200 - 1500	24.6%	75.4%
Sun 1500 - 1800	18.6%	81.4%
Sun 1800 - 2100	34.5%	65.5%
Sun 2100 - 2400	40.0%	60.0%
Sun 2400 - 0600	26.5%	73.5%

- Speech radio is very male biased
 - Speech radio delivers strong audience
 - Speech radio is always biased to ABC1's especially on weekdays and at weekend dayparts.
- Evening and overnight audiences tend to increase the level of C2DE listening but not so it dominates.

**Table 5 MARKET SHARE BY STATION BY DEMOGRAPHIC
EDINBURGH TSA**

All Adults

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	23.3	22.6	21.8	18.7	21.4	22.6	20.5
BBC SPEECH - SCOTLAND	21.7	21.1	19.4	17.3	18.7	20.1	19.1
FORTH FM	16.8	14.5	12.4	14.3	14	13.1	13.8
FORTH AM	5	7.2	5.5	6.8	6.1	5.5	6.3
REAL RADIO/SCOT FM	5.1	6.7	12.5	14.1	12.7	11.9	14.1
BEAT 106	7.8	4	6.9	7.2	6.5	8.1	6.8
KINGDOM FM	5.2	4.6	4.7	6.6	6.9	5.6	4.2
CENTRAL FM	2.9	2.2	2.1	2.3	2.8	2.2	1.8
ALL ILR	46.6	48.1	49	55.7	53.4	51.1	51.8
BBC RADIO 1	8.4	7.5	6.3	5.6	5.5	5.7	5.1
BBC RADIO 2	10	11.7	12.8	10.9	10.5	11.1	12.1
ALL BBC RADIO	41.3	41.3	39.4	34.9	36.2	38.5	37.9
ALL COMMERCIAL IR	58	57.8	59.7	64.2	63	60.9	61.2
ALL NATIONAL COMMERCIAL	11.5	9.8	10.7	8.5	9.8	10.5	10.6

Total Men

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	24.5	24.6	24	19	23	25.8	23.2
BBC SPEECH - SCOTLAND	22	22.8	20	17.3	20.4	22.8	21.3
FORTH FM	17.2	13.4	10.4	13.3	13.1	11.4	13.1
FORTH AM	4.4	6.4	5.2	7	6.5	4.3	4
REAL RADIO/SCOT FM	4.4	7.5	13.3	16.4	14.1	11.8	16
BEAT 106	7.6	8	7.4	7.3	6.2	8.9	6.4
KINGDOM FM	5.1	4.1	4.2	6.6	6.8	4.4	2.9
CENTRAL FM	2.3	2	1.4	1.2	2.3	1.6	1.1
ALL ILR	46.1	45.9	46.7	56.5	52.8	47.3	49.2
BBC RADIO 1	8.9	8.2	6.4	5.1	4.8	6.1	5.8
BBC RADIO 2	8.9	11.3	13	10.2	11.9	12	11.8
ALL BBC RADIO	41.2	43.3	40.3	33.5	38.1	42.4	40.7
ALL COMMERCIAL IR	58.2	56.1	59	65.3	61.3	57.4	58.6
ALL NATIONAL COMMERCIAL	12.1	10.2	12.3	8.7	8.7	10.6	10.8

15-24 Men

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	7.9	8.8	10.1	7.2	4.5	3.9	3.4
BBC SPEECH - SCOTLAND	6.3	7.7	7.5	6.6	3.7	3.1	2.6
FORTH FM	20.1	18	14	17.8	15.9	15.8	16.5
FORTH AM	2.1	0.6	1.5	2.3	1.2	1.8	1.5
REAL RADIO/SCOT FM	6.1	8.2	12.1	14.4	13.9	13.6	23.1
BEAT 106	20.1	31.4	27.1	29.6	22.7	26.2	17.8
KINGDOM FM	7.9	2.5	3.7	4.6	4.7	2.4	2.9
CENTRAL FM	0.8	1.4	1.6	0.3	6.4	3.2	1
ALL ILR	61.1	65.5	63.2	73	67.9	67.5	67.1
BBC RADIO 1	18.9	15.7	16.6	11.1	14	14.6	16.7
BBC RADIO 2	1.3	1.2	1.2	1.6	5.9	5.7	3.9
ALL BBC RADIO	28.2	24.6	25.6	19.7	24	24	23.3
ALL COMMERCIAL IR	71.8	75.4	73.6	79.2	75.8	75.9	75.1
ALL NATIONAL COMMERCIAL	10.7	9.9	10.4	6.1	8.7	9.1	8.2

25-34 Men

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	12.5	15.3	13.8	7.5	15	21.6	15.7
BBC SPEECH - SCOTLAND	9.9	11.6	11.4	4.8	8.4	17.3	14.7
FORTH FM	28.4	16	17.2	16.9	10.1	11	21.5
FORTH AM	1.9	5.4	1.1	0.4	2.4	2.2	0.7
REAL RADIO/SCOT FM	4.6	12.9	24	26.2	24.2	11.9	11
BEAT 106	14.6	7.7	12.9	9.9	7.8	18.8	14.7
KINGDOM FM	4	6.7	3.8	9.9	11.8	8.5	4.1
CENTRAL FM	3	1.6	0.7	1.1	1.6	0.6	0.8
ALL ILR	60.9	57.1	63.5	71.7	63.5	56.5	61.5
BBC RADIO 1	14.6	14.5	12	10.6	8.5	11.2	11
BBC RADIO 2	1.8	7.2	3.3	5.1	6.2	4.9	5
ALL BBC RADIO	26.7	34.8	26.9	20.6	23.3	34.6	32
ALL COMMERCIAL IR	73	65.1	72.4	77.9	75.2	65.2	66.9
ALL NATIONAL COMMERCIAL	12.1	8	9	6.2	11.7	8.9	9.6

35-44 Men

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	25.7	24	25.7	14.3	23.5	30	21.1
BBC SPEECH - SCOTLAND	22.7	22.2	20.6	12.5	21.3	25.6	18.6
FORTH FM	19.4	19.8	12	16.6	17.3	10.5	14.8
FORTH AM	4.8	6.4	7.1	11.8	9.5	3.5	0.8
SCOT FM (EAST)	3.4	8.4	13.1	17.9	17.4	14.7	23.4
BEAT 106 (EAST)	5.7	4.5	2.5	1.6	4.2	6.3	3.4
KINGDOM FM	7.3	4.8	4.8	5.8	8.1	2.1	2.1
CENTRAL FM	2.5	2.2	1.4	1.9	1.8	1	1.4
ALL ILR	51.4	50.5	47	60.5	60.3	39.8	46.9
BBC RADIO 1	10.5	7.9	4.1	3.8	2.1	5.9	5.5
BBC RADIO 2	3.7	6.4	15.5	11	8.6	13.8	15
ALL BBC RADIO	38.2	36.5	40.5	28.5	33.8	46.2	40.6
ALL COMMERCIAL IR	61.3	63.1	59	70.2	65.6	53.3	58.5
ALL NATIONAL COMMERCIAL	10	12.6	12	9.7	5.4	13.8	12.2

45-54 Men

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	28.9	28.8	27.8	28	25.8	18.8	24.8
BBC SPEECH - SCOTLAND	24.7	26.5	23.9	26.4	24.7	17.4	22.8
FORTH FM	13.1	9.9	7.9	12.9	19.1	15.7	8.4
FORTH AM	6.6	12.1	9.4	7.6	7	12.3	10.2
REAL RADIO/SCOT FM	5.2	5.5	14.3	15.9	11.6	16	19.5
BEAT 106	2	2.8	1	4.8	5	3.3	1.6
KINGDOM FM	4.6	3.8	6.8	7.2	5.3	6.6	5.9
CENTRAL FM	3.6	2.9	0.8	0.3	0.2	0.8	1.6
ALL ILR	40.7	42	45.1	51.9	53.7	66	57.1
BBC RADIO 1	3.8	4.8	1.7	2.1	1.9	1.4	0.9
BBC RADIO 2	14	16.8	18.5	13.2	13.8	7.1	8.8
ALL BBC RADIO	42.6	49.7	44.5	42.4	41.6	27	34.3
ALL COMMERCIAL IR	55.7	50.2	54.6	56.3	58.2	72.7	65.3
ALL NATIONAL COMMERCIAL	15	8.3	9.5	4.4	4.5	8.9	10.6

55+ Men

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	39.8	39	35.1	31.9	34.2	39	37.6
BBC SPEECH - SCOTLAND	38.8	38.4	30.2	30.4	31.8	35.5	35
FORTH FM	7.4	5.9	4	5.2	6.6	7.8	8.2
FORTH AM	5.9	6.8	5.3	10	8.8	2.3	5.3
REAL RADIO/SCOT FM	3.3	3.6	6.2	8.4	7.3	6.7	8.1
BEAT 106	0.2	0.9	0.3	0.4	0.1	1.1	1.3
KINGDOM FM	2.9	2.5	2.2	5	4.7	3.3	0.6
CENTRAL FM	1.6	2	2.4	1.8	2.6	2.2	0.7
ALL ILR	24.5	24.8	26	35	33.5	27.7	29.4
BBC RADIO 1	0.5	1.3	1.7	0.8	2	2.5	1
BBC RADIO 2	19.8	20.8	20.8	16	19.3	20.3	19.7
ALL BBC RADIO	62.6	62	55.3	48.9	54.1	61	58.6
ALL COMMERCIAL IR	36.9	36.2	44.1	50	45.3	38.9	41.3
ALL NATIONAL COMMERCIAL	12.4	11.4	18.1	15	11.9	11.2	12

Total Women

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	21.9	20.2	19.2	18.3	19.6	18.8	17.7
BBC SPEECH - SCOTLAND	21.2	19.2	18.6	17.3	16.7	17	16.8
FORTH FM	16.3	15.6	14.8	15.4	15	15	14.6
FORTH AM	5.6	8	5.9	6.6	5.7	6.9	8.7
REAL RADIO/SCOT FM	5.9	5.8	11.7	11.5	11.1	12.1	12
BEAT 106	6.3	8.8	6.3	7	6.7	7.2	7.3
KINGDOM FM	5.3	5.2	5.3	6.7	7.1	7	5.6
CENTRAL FM	3.5	2.3	2.8	3.4	3.4	3	2.5
ALL ILR	47.1	50.4	51.7	54.7	54.1	55.4	54.5
BBC RADIO 1	7.9	6.8	6.2	6.1	6.4	5.4	4.3
BBC RADIO 2	11.2	12.1	12.6	11.7	8.8	10	12.4
ALL BBC RADIO	41.4	39.1	38.4	36.4	34	34	35
ALL COMMERCIAL IR	57.9	59.8	60.5	63	64.9	65.1	64
ALL NATIONAL COMMERCIAL	10.8	9.4	8.8	8.3	11.2	10.4	10.3

15-24 Women

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	2.1	2.4	1.4	3.9	5.2	1.3	3
BBC SPEECH - SCOTLAND	1.5	2.2	1.1	0.5	0.4	1.3	2.5
FORTH FM	23.2	22.1	21.5	15	18.2	21.1	23.4
FORTH AM	3.1	3.4	2.7	0.4	1	1.5	0.9
REAL RADIO/SCOT FM	7.3	4.7	17	17.4	11.2	10.7	11
BEAT 106	19	31	16.1	16.9	22.1	22.5	21.3
KINGDOM FM	9.8	4.5	5.8	9.3	6.9	8.1	11.3
CENTRAL FM	4	0.8	2.5	2.8	0.7	0.9	1
ALL ILR	69.6	71.2	72.1	64.8	65	69.2	73.7
BBC RADIO 1	19.6	13.8	15.3	20.5	20.8	13	9.4
BBC RADIO 2	0	3.8	6.4	5.7	0.6	2.8	2.9
ALL BBC RADIO	21.3	19.8	22.9	26.8	22.2	17.6	14.8
ALL COMMERCIAL IR	78.5	79.3	75.5	72.8	76.7	80.8	84.1
ALL NATIONAL COMMERCIAL	8.9	8.1	3.3	8	13.4	13.5	12.5

25-34 Women

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	8.5	8.2	8	13	15.2	11.2	7.8
BBC SPEECH - SCOTLAND	8.2	8.1	7.6	12.9	11.6	8.6	5.7
FORTH FM	18.2	19.6	15.7	21.9	15.1	17.8	18.4
FORTH AM	3.2	6.9	2.6	3.1	1.6	2.5	2.7
REAL RADIO/SCOT FM	5.8	8.3	17.9	14.9	11.3	11.1	12.8
BEAT 106	16.2	10.3	15.2	18.5	11	13.6	20
KINGDOM FM	9.5	7.7	7.7	6.1	11.9	9.6	4.9
CENTRAL FM	3.1	2.2	2.4	0.7	2.1	3.1	2.4
ALL ILR	59.9	60.4	65.4	68.8	56.9	63.8	68
BBC RADIO 1	14.1	16.3	11.8	7.8	8.8	6.9	7.1
BBC RADIO 2	2.5	5.1	6	4.4	5.4	6.1	9
ALL BBC RADIO	26.8	29.5	25.4	25.3	27.7	23.4	21.9
ALL COMMERCIAL IR	72.8	69.5	72.1	74.2	70.8	75.3	75.6
ALL NATIONAL COMMERCIAL	12.8	9.1	6.7	5.4	14.5	12.2	8.3

35-44 Women

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	14.8	13	14.6	15.3	10.8	9.6	12.1
BBC SPEECH - SCOTLAND	14.6	12.9	14.1	14.5	10.1	9	11.2
FORTH FM	24.6	21.8	19.7	21.3	23.5	20.7	25
FORTH AM	7.5	6.3	5.2	3.4	5.4	4.7	3.1
REAL RADIO/SCOT FM	10.2	10.8	18	17.7	19.9	25.5	17.2
BEAT 106	1.6	8.7	5	3.5	3.2	4.2	5.7
KINGDOM FM	7	9.2	9.9	8.9	7.5	12.2	8.5
CENTRAL FM	1.3	3.9	2.2	7	10.2	3.3	2.4
ALL ILR	55.8	64.4	63.7	66.4	75	72.5	64.2
BBC RADIO 1	7.8	6.4	5.3	5.1	4.1	5	4
BBC RADIO 2	11	7.2	10.2	9.1	4.3	6.2	13.2
ALL BBC RADIO	33.9	26.8	29.8	29	19.1	20.8	29
ALL COMMERCIAL IR	65.6	71.7	69.9	71	80.9	79.2	70.6
ALL NATIONAL COMMERCIAL	9.8	7.3	6.2	4.6	6.1	7.2	6.8

45-54 Women

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	19.7	23.3	22.8	15.6	18.8	21.9	13.9
BBC SPEECH - SCOTLAND	19	22.5	22.2	15.6	16.5	18.3	13.1
FORTH FM	18.9	11.3	15.4	15.2	18	16.1	11
FORTH AM	9.9	14.7	5.5	8.3	6.5	2.6	7.2
REAL RADIO/SCOT FM	3.4	7.3	12	12.6	12.9	12.2	18.5
BEAT 106	1.4	3.8	2.6	3.2	2.2	1.6	0.7
KINGDOM FM	3.7	4.7	5.8	13.1	10.9	7.5	6.2
CENTRAL FM	3.3	3.1	5.4	5.8	2.7	4.5	2.2
ALL ILR	46.6	50.2	50.1	62.3	60	49.8	51.8
BBC RADIO 1	2.8	2.2	4.5	2.4	2.7	6.4	5.9
BBC RADIO 2	16.8	16.9	13.7	14.2	12.3	16.2	16.1
ALL BBC RADIO	41	42.2	40.8	33.2	33.4	42.3	36.4
ALL COMMERCIAL IR	58	57	58.1	66.4	66.2	57.2	63.4
ALL NATIONAL COMMERCIAL	11.4	6.8	8	4	6.2	8.9	13.5

55+ Women

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	43	37.8	33.8	31.5	35.7	35.4	32.8
BBC SPEECH - SCOTLAND	41.7	35.3	32.8	30.3	32.3	33.2	32.1
FORTH FM	6.6	9.2	8.2	9.3	6.4	6.7	5.5
FORTH AM	5	8.3	9.5	12.5	10.4	15.2	18.2
REAL RADIO/SCOT FM	4.1	1.3	2.4	2.9	4.6	5.9	6.3
BEAT 106	0.1	0.2	0.2	0	0.4	0.3	0.1
KINGDOM FM	0.9	2.1	0.9	1.4	2.4	2	1.7
CENTRAL FM	4.7	1.8	2.3	2	2.1	3.2	3.3
ALL ILR	25.4	27.4	29.4	32.2	31.1	37.3	37.1
BBC RADIO 1	1.4	0.7	0.7	0.3	0.4	0.2	0.5
BBC RADIO 2	18.6	20.2	19.6	18.5	15.9	14.8	15.4
ALL BBC RADIO	62.7	58.6	55.6	52.5	53	51.1	51.3
ALL COMMERCIAL IR	36.4	39.9	43.7	46.4	45	47.6	47.7
ALL NATIONAL COMMERCIAL	11	12.5	14.2	14.1	13.9	10.4	10.6

ABC1 Adults

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	28.6	31.5	29.8	25.7	26	28.8	27.7
BBC SPEECH - SCOTLAND	27.3	30.5	27.4	24	23.6	27.2	26.5
FORTHONE (was FORTH FM)	14.3	12.2	10.9	13.4	12.6	11.3	13.3
FORTH2 (was FORTH AM)	3.5	4.6	3.2	3.2	3.4	2.2	3.4
REAL RADIO/SCOT FM	4.1	5.1	9.9	11.2	10.9	10.9	10.2
BEAT 106	5.9	6	3.5	4.2	4.7	5.7	4.1
KINGDOM FM	4.2	2.1	2.8	3.8	3.8	4	2.8
CENTRAL FM	1.9	1.4	1.2	2.2	1.5	1	1.2
ALL ILR	37.2	33.9	35.2	40.6	39.6	37.5	38.2
BBC RADIO 1	9.6	7.7	6.8	7.7	8.4	7.3	5.7
BBC RADIO 2	11.3	13.4	15.5	13.7	13.4	13.9	15.1
ALL BBC RADIO	50.1	53.4	51.4	46.8	47.7	51.3	50.4
ALL COMMERCIAL IR	49.3	45.8	47.7	52.1	51.1	47.8	48.7
ALL NATIONAL COMMERCIAL	12.1	11.9	12.5	11.5	11.8	10.6	10.9

C2DE Adults

	Qtr 4 2000	Qtr 4 2001	Qtr 4 2002	Qtr 1 2003	Qtr 2 2003	Qtr 3 2003	Qtr 4 2003
ALL SPEECH - SCOTLAND	18.1	15.4	15	13.1	17.4	17.4	14.5
BBC SPEECH - SCOTLAND	16.2	13.7	12.5	11.9	14.3	14.2	12.9
FORTHONE (was FORTH FM)	19.3	16.2	13.7	15.1	15.2	14.6	14.2
FORTH2 (was FORTH AM)	6.4	9.2	7.4	9.7	8.5	8.2	8.7
SCOT FM (EAST)	6.1	8	14.7	16.3	14.2	12.8	17.3
BEAT 106 (EAST)	8	10.3	9.8	9.5	8	10.2	9.1
KINGDOM FM	6.2	6.5	6.2	8.9	9.6	7	5.3
CENTRAL FM	3.8	2.8	2.8	2.3	4	3.2	2.2
ALL ILR	55.7	59.2	60.7	67.6	65.5	62.4	63.1
BBC RADIO 1	7.2	7.4	5.9	3.9	3	4.5	4.6
BBC RADIO 2	8.7	10.3	10.6	8.7	7.9	8.8	9.6
ALL BBC RADIO	32.8	31.8	29.3	25.4	26.1	27.8	27.6
ALL COMMERCIAL IR	66.5	67.4	69.9	73.8	73.3	71.9	71.7
ALL NATIONAL COMMERCIAL	10.8	8.1	9.1	6.2	8.1	10.5	10.3