

Edinburgh independent local radio licence applications

Questions and responses: Edinburgh CityBeat

These are the responses from Edinburgh CityBeat to the non-confidential questions asked by Ofcom regarding the group's application for the Edinburgh licence.

1. Did the findings of your research programme identify dissatisfaction amongst the target audience with current provision, and if so, how?

We have documented our belief that 30-54 year old females are demonstrating their dissatisfaction with existing stations by not listening to the radio as much as 30-54 females in the Clyde 1 TSA. They also listen for less average hours across the week and they fall short of male average weekly listening hours. These observations still hold true in Qtr 3, 2004.

When compared to UK averages, the current variances are:

- ◆ 30-54 females are 5% less likely to be listening to radio in ForthONE's TSA and males are 8% more likely to be listening – resulting in a 13% male bias in radio listening.
- ◆ 30-54 females are listening for 7% less average hours than the UK average (this rises to 13% amongst 35-54 females) and males are listening for 2% more – resulting in a 9% male bias in average listening hours.

The ForthONE market is much more biased towards male listening than the UK as a whole and is having a suppressing effect on female listening.

Local commercial radio in the ForthONE TSA attracts 19.9 average weekly listening hours from 30-54 year old males and only 15.1 from females, 24% less. 30-54 males spend 1.5 hours a week listening to Other Listening, 30-54 females spend 6.5 average hours a week, 4 times as much.

In addition to the above, of all the stations with a reach greater than 10%, not one of them has a female biased reach profile amongst 30-54 females:

Station	30-54 Female Reach		30-54 Male Reach		30-54 Female Share		30-54 Male Share	
	Q2, 04	Q3, 04	Q2, 04	Q3, 04	Q2, 04	Q3, 04	Q2, 04	Q3, 04
Real Radio	38%	34%	40%	40%	21.7%	20.3%	23.4%	21.9%
ForthONE	28%	26%	39%	35%	13.1%	12.0%	19.8%	16.9%
Radio 2	23%	19%	26%	22%	13.5%	11.9%	10.0%	8.7%
Radio Scotland	16%	14%	26%	24%	4.3%	3.4%	4.5%	6.8%
Radio 1	13%	12%	16%	20%	4.0%	4.3%	5.3%	5.0%
Radio 5 LIVE	6%	7%	20%	19%	2.4%	2.8%	6.6%	6.8%
Beat 106	14%	13%	14%	23%	4.0%	6.9%	3.8%	8.2%
Radio 4	14%	13%	13%	13%	7.9%	8.2%	3.9%	3.0%
Forth2	9%	7%	14%	11%	5.4%	3.6%	3.6%	1.8%
Classic FM	9%	7%	12%	9%	2.8%	1.9%	2.2%	1.6%
talkSPORT	2%	3%	10%	8%	0.5%	3.5%	2.8%	3.6%
TOTALS	172%	155%	230%	224%	79.6%	78.8%	85.9%	84.3%

In Qtr 2 2004 (red) only Radio 4 (highlighted) had a greater reach amongst 30-54 year old females than males and Radio 2, Radio 4, Forth 2 and Classic FM had a greater share amongst females. In Qtr 3 2004 (blue) there were no stations that had a greater reach amongst females than males and again only Radio 2, Radio 4, Forth2 and Classic FM had greater share amongst 30-54 year old females.

The table also shows that the attraction to 30-54 year old females of the top 11 stations in the market waned between Qtr 2 and Qtr 3, with the number of stations each listener listened to on average reducing by 10% (males also reduced by 3%). The market share of these top stations amongst females, also lowered by 0.6% share, a 6% reduction, indicating less interest than males.

The only stations to increase their reach amongst females this quarter were Radio 5 LIVE and talkSPORT, a case of 'if you can't beat them', perhaps. The only local commercial station to register an increase in hours amongst 30-54 females this quarter was Beat 106.

There are 20,000 more females in the ForthONE TSA than males and yet they only listen for 4,538,000 weekly listening hours, whereas males are amassing 6,277,000 hours – 38% more.

In our market gap survey when we asked 30-54 year olds which stations had the best music, presenters and news and information for Edinburgh, only Kingdom registered higher scores amongst females than males (8% of females stated it had the best music, best presenters and 7% stated best news for Edinburgh). This is because females scored "other", "none" or "don't know" more than males; 23% for best music, 24% for best presenters and 24% for best news for Edinburgh.

30-54 females were 32% less likely than males to consider ForthONE as having the best music, 6% less likely to consider it has the best presenters and 21% less likely to consider ForthONE as best for news for Edinburgh.

Those 30-54 year old females that stated they will listen to a new station were 15% more likely than males to listen to radio for longer in order to tune in to the new station.

2. Can you clarify further your reasons for using the Clyde 1 TSA as a comparison base against which to assess the RAJAR analysis on page 21?

We felt that Clyde 1's TSA represented an interesting comparison because the markets are as similar as any two distinct areas can be and we wanted to understand why 30-54 females in Edinburgh were so unenthusiastic towards radio compared to males.

We acknowledge that Glasgow and Edinburgh as cities and cultures may not be exactly identical but they share a similar ethnic identity and they also share the same stations. Q96 and Kingdom apart, the stations serving the areas are the same. The format of ForthONE and Forth 2 are very similar to Clyde 1 and Clyde 2 (Saga was not on air).

The puzzle we sought to solve was why the SRH stations, local commercial radio and radio listening altogether in Edinburgh failed to keep pace with Glasgow when the provision was identical. Was this a cultural issue or a radio issue?

It is clear from our table in answer to your first question that the SRH/Real Radio/Beat 106 stations are male biased and this is having an effect on radio listening at both ends of the M8.

The one thing that was clear, is that all radio and, in particular local commercial radio, underperforms in Edinburgh amongst females more than it does in Glasgow. Other applicants have argued that the market gap is males because they are the listener group that are already listening for long periods to radio. I fail to see how that argument stacks up. Their lifestyles will only allow them to physically allocate so many hours a week to radio and then they will have to stop listening to one of the male orientated stations in order to listen longer. Whereas, our comparison infers that females have the capacity to listen to the radio for longer and are more likely to increase overall listening

to radio and commercial radio to a new station that suits their requirements. This was a point confirmed in our demand research (see question 1 above).

3. Was the sample used for the quantitative survey representative of the Forth One TSA?

Yes. Although we adopted the smaller TSA size recommended in the Ofcom guidelines, we actually surveyed over the whole of the ForthONE TSA. We decided for prudence that we should go with the smaller TSA for the sake of the business plans. This means that our audience projections stand good for extrapolation up to the Forth 1.1m TSA that most other applicants adopted.

4. Given that ‘Celtic Rock’ will account for a fair portion of the station's music policy, is it possible to give substantially more artist examples beyond the list of Texas, Deacon Blue and Rod Stewart that is provided in the application form?

Altered Images	PhD/Jim Diamond
An Emotional Fish	Pretenders
Ash	Prefab Sprout
Aztec Camera	Proclaimers
Big Country	Runrig
Bonnie Tyler	Saw Doctors
Boomtown Rats/Bob Geldof	Simple Minds
Brian Kennedy	Sinead O'Connor
Bryan McFadden	Small Faces
Cactus World News	Snow Patrol
Catania	Stereophonics
Danny Wilson	That Petrol Emotion
Del Amitri	The Alarm
Divine Comedy	The Assembly
Edwyn Collins/Orange Juice	The Corrs
Eurythmics/Annie Lennox	The Cranberries
Franz Ferdinand	The Frank and Walters
Garbage	The Pogues
Gary Moore	The Thrills
Hothouse Flowers	The Undertones/Feargal Sharkey
Hue & Cry	Thin Lizzy/Phil Lynott
Keane	Travis
Kirsty McColl	U2
Lloyd Cole	Ultravox/Midge Ure
Lost Prophets	Van Morrison
Manic Street Preachers	Waterboys/Mike Scott
Marillion/Fish	World Party

5. Please confirm that your speech requirement will be “speech should never fall below 25% over 24 hrs” (i.e. that the word “during” has been included in error).

That is correct, the word during was included in error.