

South Wales independent local radio licence applications

Questions and responses:

These are the responses received from Original FM to the non-confidential questions asked by Ofcom regarding their application for the South Wales licence.

- 1. On page 34 it states, “even though some 10% of our TSA can speak the language, it still means the majority (90%) cannot”. Please can you provide the reference for or details of the calculations made for this statistic.**

The figure is based on NSO Neighbourhood Statistics tables UV13 for each of the local authorities relevant to our TSA, taking those groups which were not identified as Welsh speaking. In more detail the tables break out the following for each local authority area:-

- Understands spoken Welsh but cannot speak, read or write Welsh
- Speaks, reads and writes Welsh
- Speaks but neither reads nor writes Welsh
- Speaks and reads but cannot write Welsh
- Reads but neither speaks nor writes Welsh
- Writes but neither speaks nor reads Welsh
- Reads and writes but does not speak Welsh
- No knowledge of Welsh
- Other combination of skills

We took the "no knowledge of Welsh" figure plus the categories that would mean the respondent could not speak Welsh. The average for the local authority areas which approximate to our proposed core TSA was then calculated and the percentage of those who could not speak Welsh (so could not participate in any Welsh phone in or discussion) came out at around 10%.

- 2. Please explain the rationale and justification for the statement; “We believe the relatively low 25-34 share is more a Rajar aberration than a reality”. (page 48)**

We clearly identified the drop in ILR market share amongst all adults in South Wales in our detailed examination of the marketplace. However, the drop amongst 25-34s in the last quarter is out of sync with age groups on either side (15-24s and 35-44s) as the table below shows:-

| Market Share | Q3 04 | Q3 05 | Q3 06 |
|--------------|-------|-------|-------|
| 15-24 | 55.7 | 53.3 | 49.9 |
| 25-34 | 52.9 | 44.9 | 36.0 |
| 35-44 | 47.4 | 51.5 | 46.6 |

Experience shows that simplistic analysis of quarter-on-quarter or year-on-year Rajar results can lead one to incorrect conclusions. This sort of result immediately points one to a deeper analysis of the data and in this case the culprit is Real Radio 25-34s, where the year-on-year results fluctuate by over 100%, and in particular the Q3 06 market share of 8.2% was down from 16.8% twelve months earlier. In the same vein,

Real Radio's 35-44 market share was 16.3% in Q3 03, 16.1% in Q3 04 and shot up to 22.9% Q3 05 before settling back to a more usual 15.3% in Q3 06. It would be logical to call their Q3 05 result also out of the ordinary.

- 3. With regard to the main quantitative survey, could you please clarify if the data was weighted, and if so, on what basis? If the data was weighted, could you please provide a comparative breakdown between any weighted and unweighted sample.**

As stated on page 52 of the application "Quotas were achieved and no weighting was needed".

- 4. With regard to the content quantitative survey, could you please clarify if the data was weighted, and if so, on what basis? If the data was weighted, could you please provide a comparative breakdown between any weighted and unweighted sample.**

As stated on page 58 "Interlocking age, gender and social grade quotas ensured broadly equivalent sampling within each age band, and the results were then weighted to reflect the 30-59 population profile more precisely. Weighting factors were low, ensuring confidence in the results".

The breakdown between the weighted and unweighted sample is also identified in the tables provided in appendix. The comparative breakdown was as follows:-

| | | | | |
|------------|-------|-------|-------|-------|
| Age | 35-59 | 30-39 | 40-49 | 50-59 |
| Unweighted | 375 | 150 | 150 | 150 |
| Weighted | 369 | 162 | 149 | 140 |
| Males | 35-59 | 30-39 | 40-49 | 50-59 |
| Unweighted | 175 | 70 | 70 | 70 |
| Weighted | 181 | 79 | 74 | 68 |
| Females | 35-59 | 30-39 | 40-49 | 50-59 |
| Unweighted | 200 | 80 | 80 | 80 |
| Weighted | 188 | 83 | 74 | 72 |
| ABC1 | 35-59 | 30-39 | 40-49 | 50-59 |
| Unweighted | 205 | 82 | 82 | 82 |
| Weighted | 201 | 88 | 81 | 76 |
| C2DE | 35-59 | 30-39 | 40-49 | 50-59 |
| Unweighted | 170 | 68 | 68 | 68 |
| Weighted | 168 | 74 | 68 | 64 |

- 5. For the focus groups, could you please provide details of the recruitment criteria and process. Additionally could you please supply a copy of the discussion guide and transcripts of the focus groups if available.**

The Knowledge Agency contracted recruitment for the focus groups to specialist fieldwork agency The Hub, a division of Saatchi and Saatchi, using their network of

MRS-accredited recruiters in the South Wales area. Recruiters randomly approached potential respondents in multiple locations in Swansea and Cardiff, using the attached recruitment questionnaires to identify those who fulfilled the recruitment criteria, and were willing and able to participate in the groups on the specified dates.

Participants were recruited on the basis of their favourite radio station (stations that represent 80% of current listening in the TSA):-

| Group | Favourite station |
|--------|------------------------------------|
| Male | Red Dragon/BBC Radio 1 |
| Male | Real Radio/BBC Radio 2 |
| Male | BBC Radio 4/Radio 5/Wales |
| Female | Real Radio/BBC Radio 2 |
| Female | The Wave/BBC Radio 1 |
| Female | BBC Radio 4/Radio Wales/Classic FM |

Participants had to be aged 35-54; live and/or work in the area and be regular ILR listeners. The groups were split 50:50 between 35-44s and 45-54s and each session lasted one and a half hours. All participants completed a week's listening diary in the run-up to the groups.

We have attached a copy of the recruitment questionnaires and the discussion guide.

The Knowledge Agency was not asked to provide transcripts of the groups but would be happy to provide audio recordings if so desired.

6. Please confirm the subgroup sizes for the charts on pages 52,53,54,55,56,57,58 and 60 of the application. As data tables were supplied for the core area and the extended area, could you confirm which was used for the analysis for the application.

We confirm that all data used in the application document refers to the core area only as stated on page 2 of the application.

| Subgroup | Number of respondents |
|-------------------------------|-----------------------|
| 15+ | 800 |
| ABC1 35-59 | 188 |
| Male 35-59 | 159 |
| ILR Rejectors | 230 |
| Definitely listen to Original | 265 |
| BBC Radio 2 Listeners | 301 |
| BBC Radio Wales Listeners | 297 |
| Red Dragon Listeners | 305 |
| Real Radio Listeners | 374 |
| The Wave Listeners | 147 |
| Swansea Sound Listeners | 102 |
| Capital Gold Listeners | 37 |