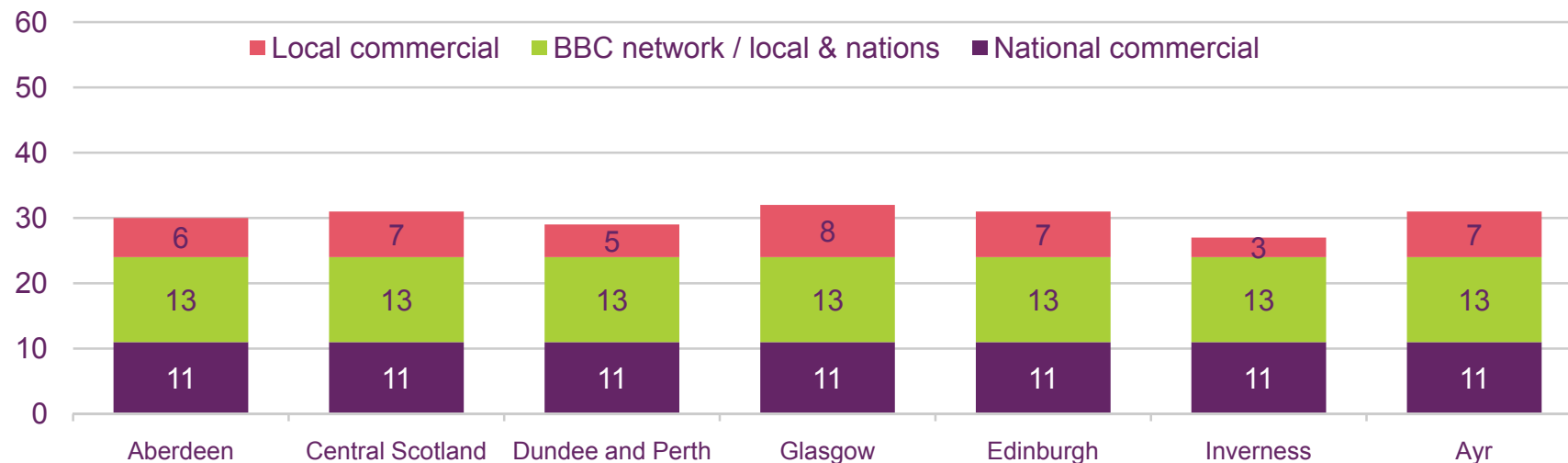


Radio and audio content

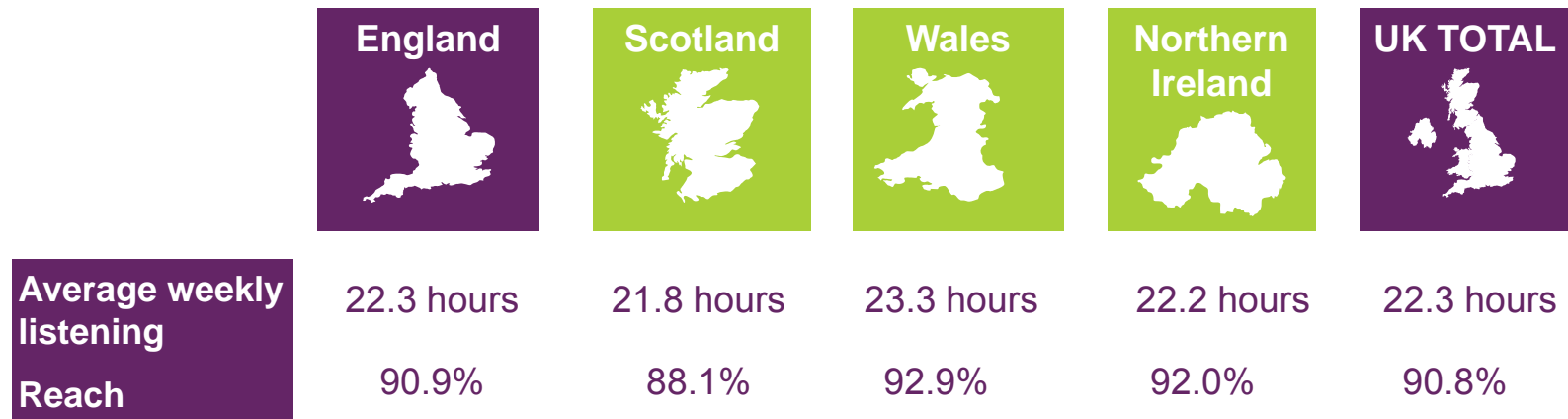
Availability of DAB stations, by area



Source: Ofcom, June 2011

Note: This chart shows the maximum number of stations available in each area; local variations along with reception issues mean that listeners may not be able to access all of these

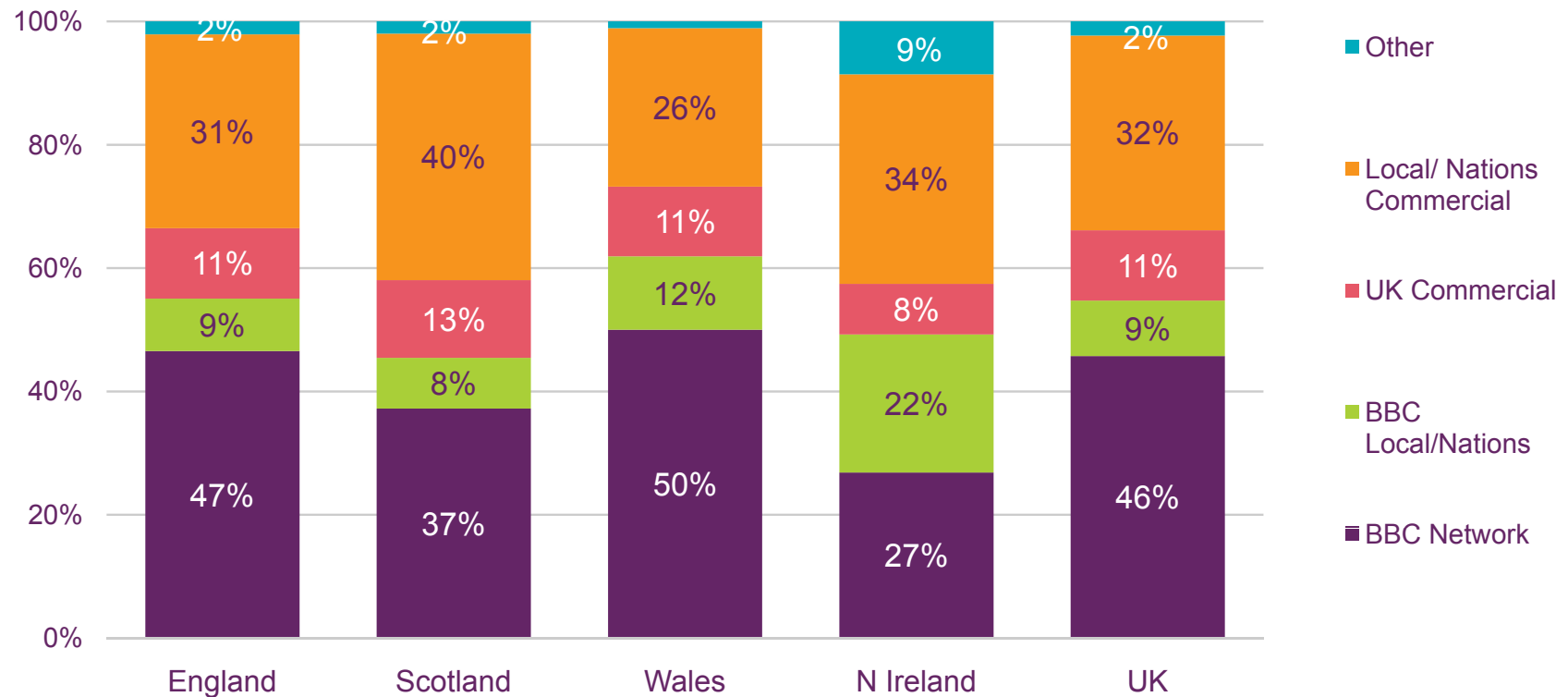
Average weekly reach and listening hours – year to Q1 2011



Source: RAJAR, All adults (15+), year ended Q1 2011. Reach is defined as the total proportion of the respective adult population who listened to at least five consecutive minutes in the average week.

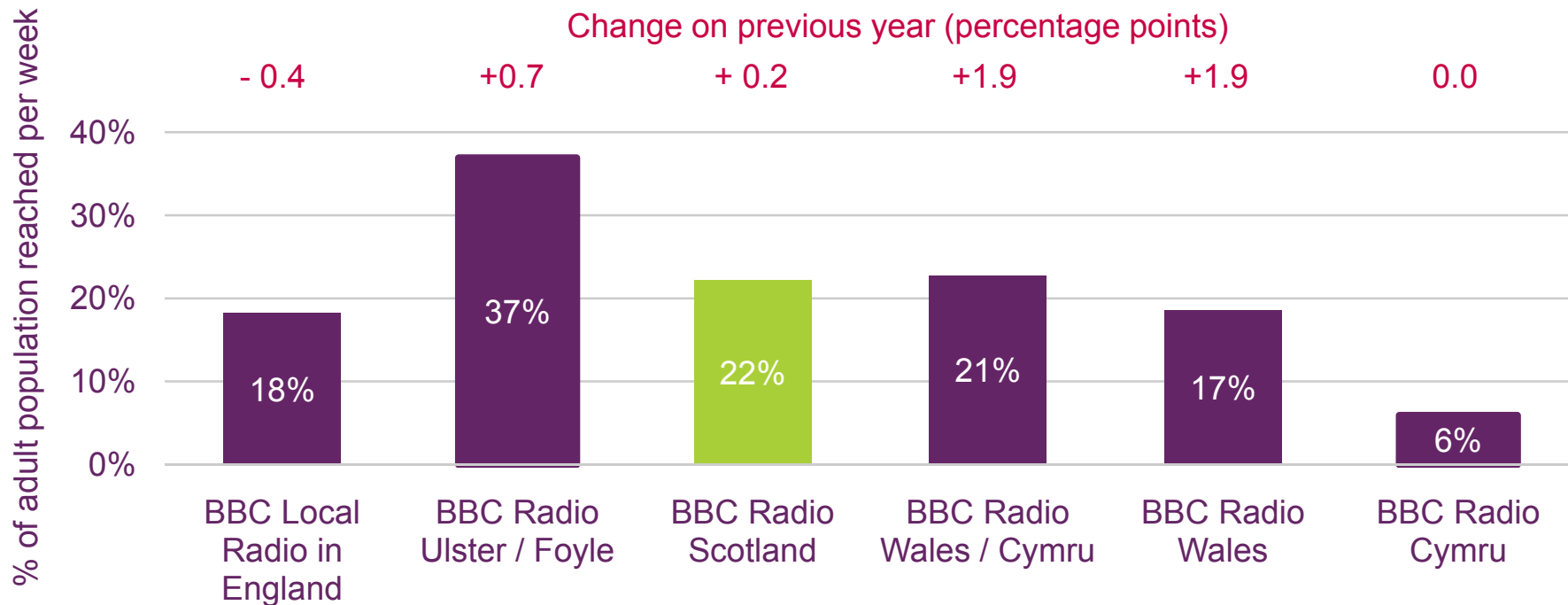
Share of listening hours, by nation– year to Q1 2011 (Audience share for BBC and commercial stations, local /national)

Audience share for BBC and commercial stations, local/national



Source: RAJAR, All adults (15+), year ended Q1 2011
 BBC Local/National includes both BBC Scotland and Radio Nan Gaidheal

Weekly reach for national/ local BBC radio, year to Q1 2011



Source: RAJAR, All adults (15+), year ended Q1 2011. Reach is defined as the total proportion of the adult population within each respective TSA who listened to at least five consecutive minutes in the average week.

Ownership of DAB digital radios

Percentage of respondents

Figure above bar shows % point change in DAB sets in household from Q1 2010



Own DAB	37%	31%	39%	27%	28%	30%	32%	29%	26%	37%	31%
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Q4. You said earlier that you have (NUMBER) radio sets in your home that someone in the household listens to in most weeks. How many of these radio sets are digital radios?

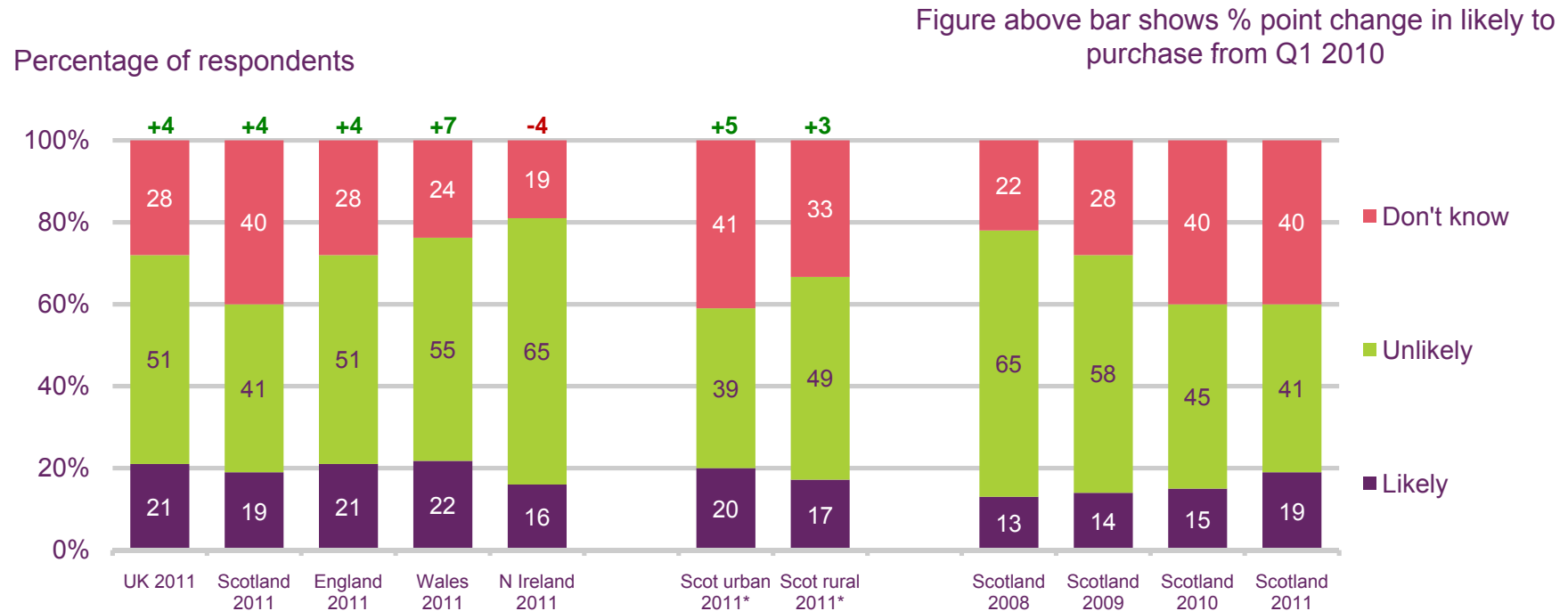
Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who listen to radio and have any active radio sets in the household that someone listens to in most weeks (n = 2811 UK, 357 Scotland, 1629 England, 397 Wales, 428 Northern Ireland, 174 Scotland urban, 183 Scotland rural, 766 Scotland 2008, 780 Scotland 2009, 1034 Scotland 2010, 357 Scotland 2011)

Note: Remaining percentages are Don't know responses.

NB. Data previous to 2011 is based on all who listen to radio. Data in 2011 is based on those who listen to radio and have any radio sets in the household that someone listens to in most weeks.

Likelihood of purchasing a DAB radio within the next year



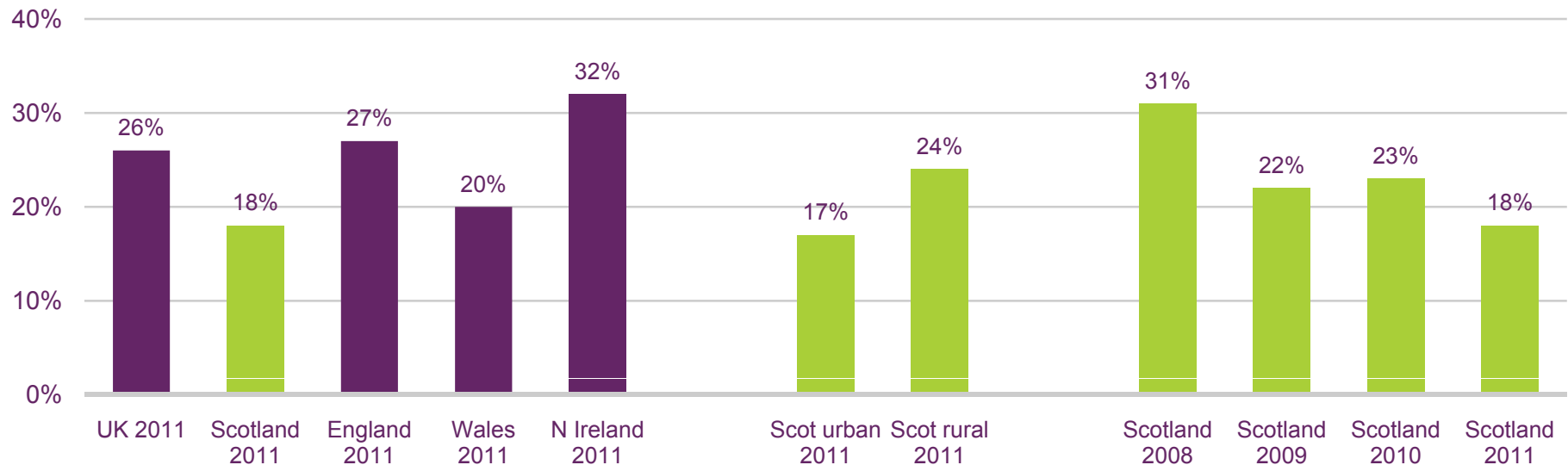
QP12: How likely is it that your household will get a DAB radio in the next 12 months?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1304 UK, 156 Scotland, 703 England, 207 Wales, 238 Northern Ireland, 70 Scotland urban, 86 Scotland rural, 550 Scotland 2008, 558 Scotland 2009, 661 Scotland 2010, 156 Scotland 2011). NB. Data previous to 2011 is based on all who listen to radio and do not have a DAB set. Data in 2011 is based on those who listen to radio, do not have a DAB set and have any radio sets in the household that someone listens to in most weeks. *Caution: Low base

Use of either an MP3 player or an iPod

Use of either an MP3 player or an iPod (% adults)



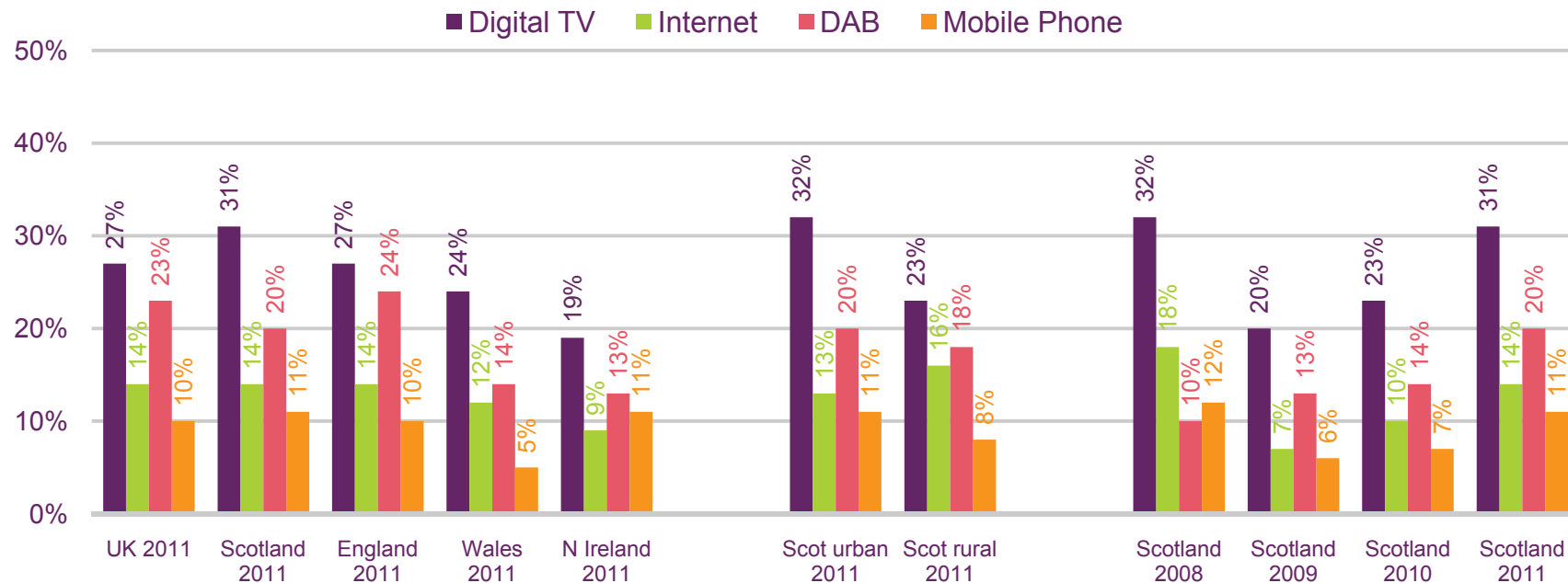
QB2. Do you personally use: MP3 player/ iPod?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural , 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011).

Listening to radio via internet, DTV, mobile phone

Proportion of respondents (%) who have listened to radio via DTV, internet or mobile phone



QP11. How often, if at all, do you access the radio via – Digital radio via: TV, Internet, DAB radio, mobile phone?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011).

Share of radio listening hours via digital and analogue platforms, year to Q1 2011

Digital increase

year on year +1.0

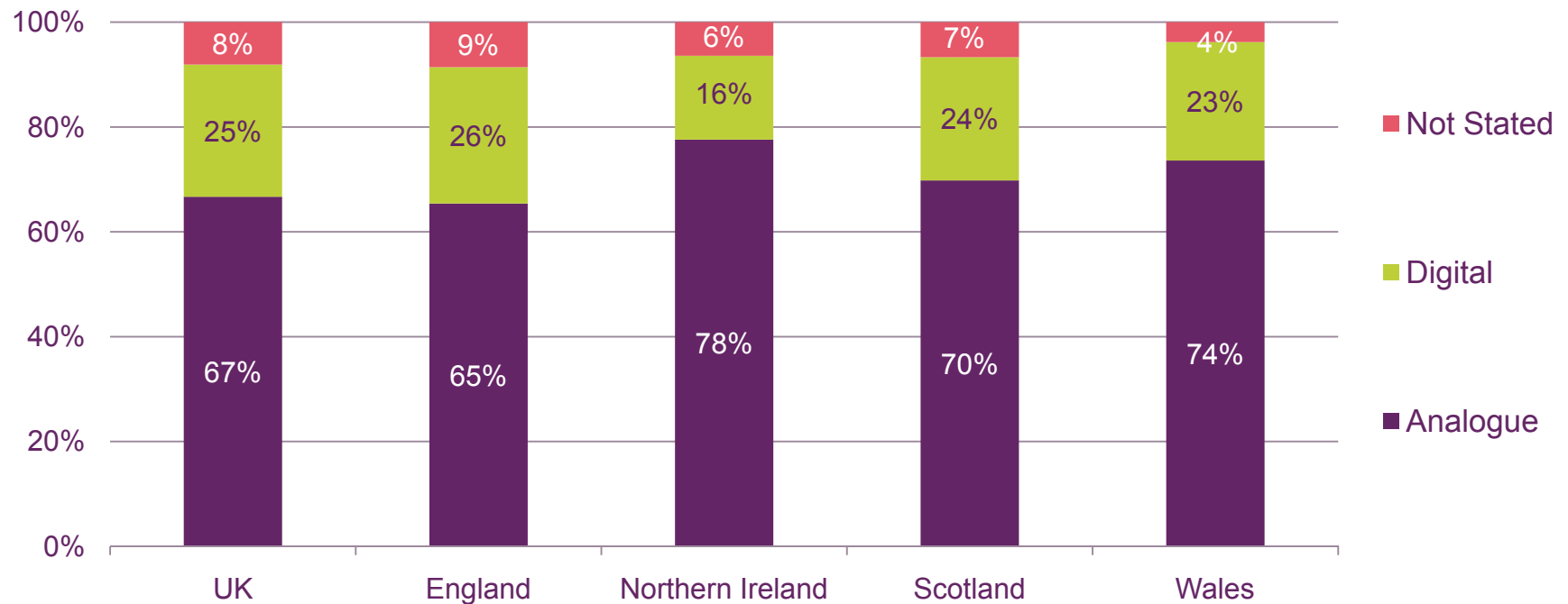
+1.0

+2.0

+2.0

+ 1.0

% listening hours



Source: RAJAR, All adults (15+), year ended Q1 2011.

Listening to audio content on mobile phone

Proportion of respondents (%) who have used their mobile to listen to audio content

Figure above bar shows % point change in listening to audio content from Q1 2010

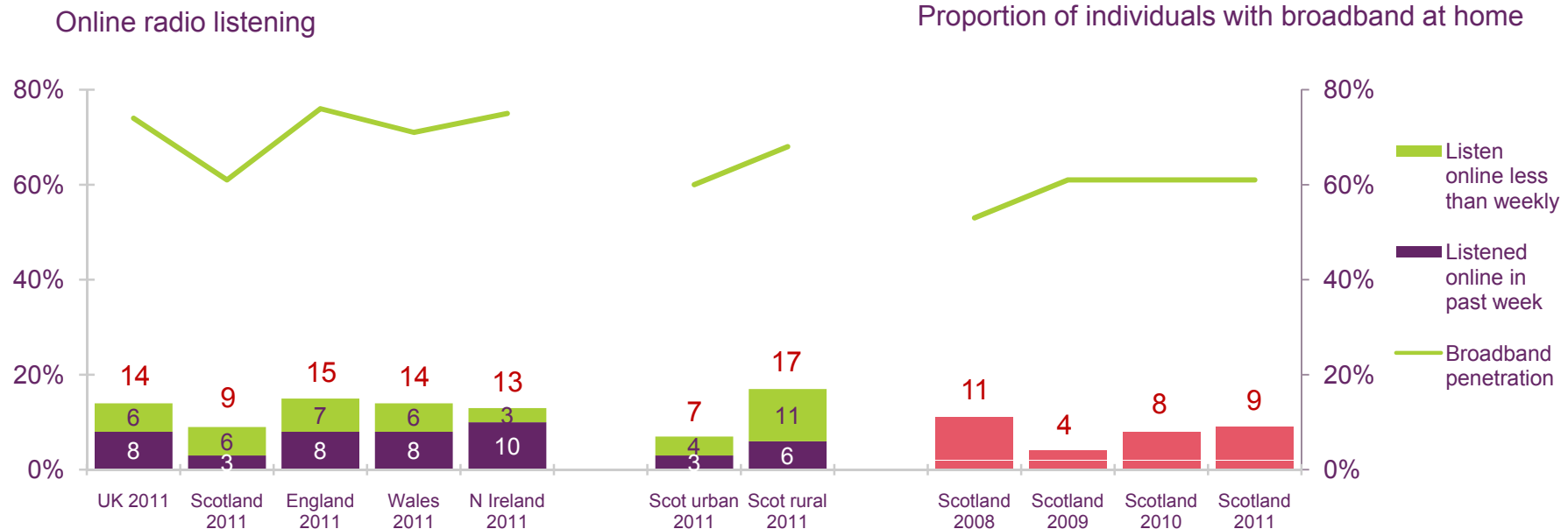


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever making this use)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Proportion of adults living in a household that has used the internet to listen to radio

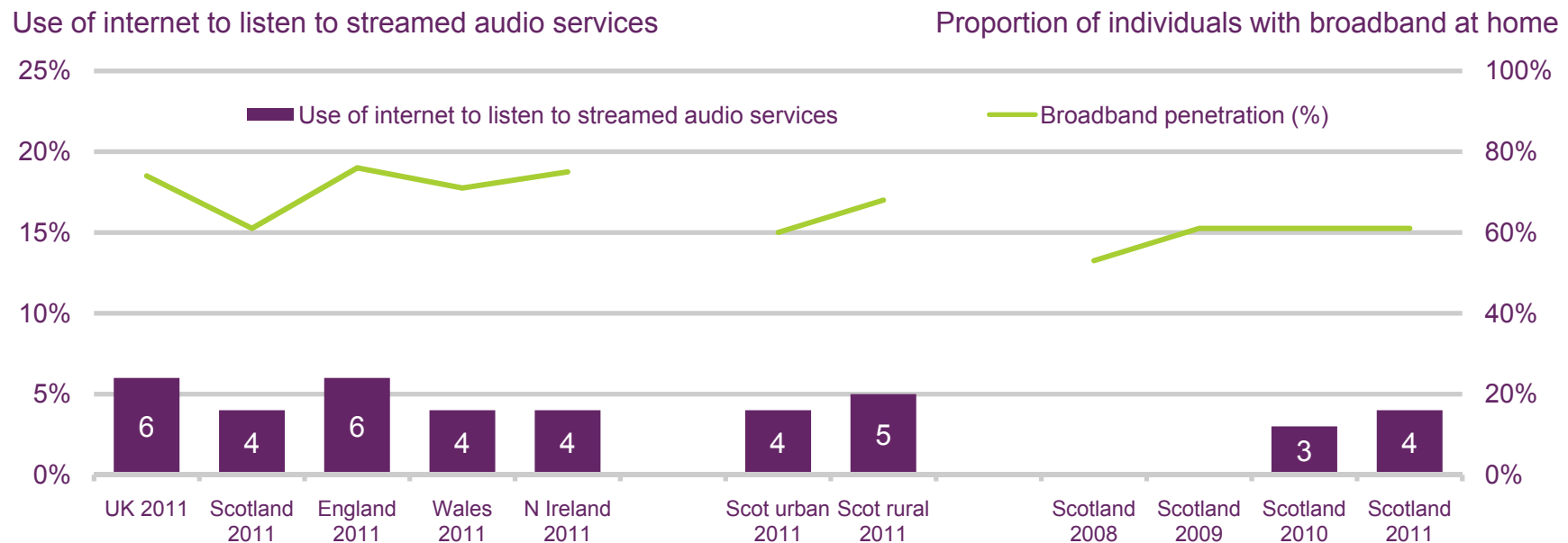


QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever making this use)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011)

Use of internet for listening to streamed audio services

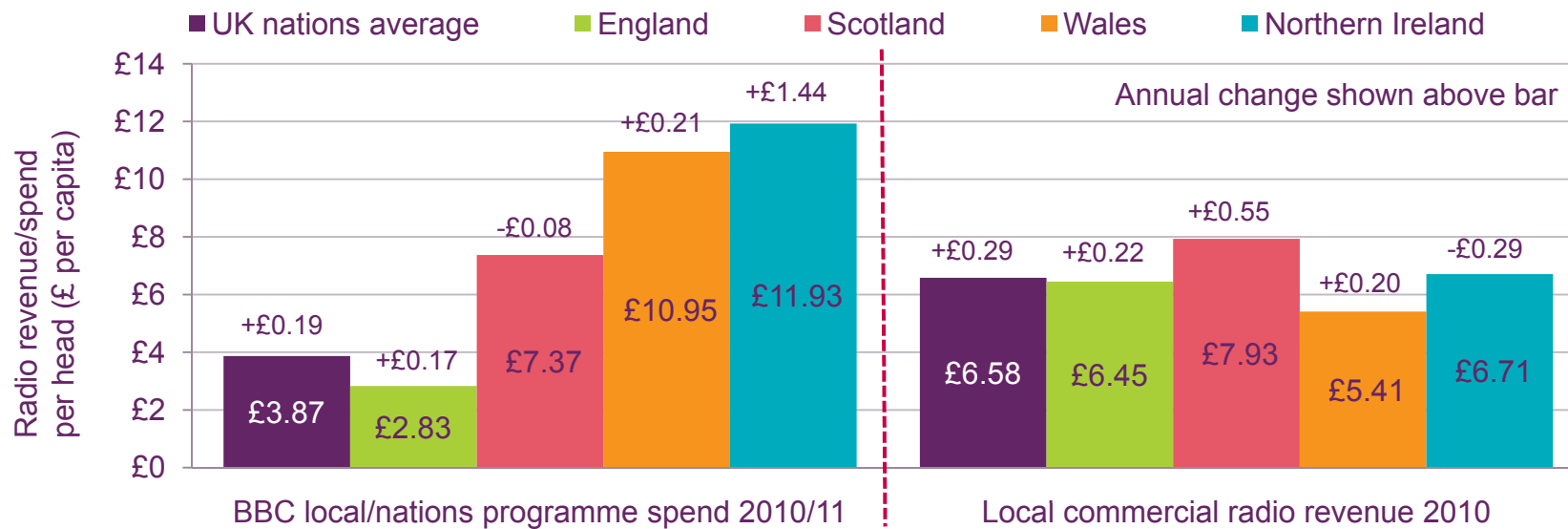


QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home? (NB Not asked in 2008 or 2009)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 1468 Scotland 2010, 487 Scotland 2011)

Local/nations radio spend and revenue per head of population 2010/11



Source: Broadcasters, 2010

Note: The UK total shows the average for local commercial radio across the four nations and therefore excludes revenues for the UK-wide commercial stations: Classic FM, talkSPORT, and Absolute. These figures supersede all others and are not directly comparable with historical data.

Community radio stations in Scotland



Source: Ofcom

Community station	Location	On-air date
shmuFM	Aberdeen	20/10/2007
Speysound Radio	Badenoch & Strathspey	06/12/2009
Pulse FM	Barrhead	28/07/2009
Revival Radio	Cumbernauld	03/09/2006
Alive Radio	Dumfries	01/09/2009
Dunoon Community Radio	Dunoon, Argyll	01/12/2009
Edinburgh Garrison FM	Edinburgh	14/08/2006
Celtic Music AM	Glasgow	16/01/2008
Awaz FM	Glasgow - Central	01/01/2006
Insight Radio, RNIB Scotland	Glasgow - West	30/03/2007
Sunny Govan Radio	Govan	23/03/2007
Leith FM	Leith	24/03/2007
Black Diamond FM	Midlothian	29/03/2007
Super Station Orkney	Orkney	14/01/2008
Bute FM	Rothesay, Isle of Bute	15/07/2009
3TFM	Saltcoats & Adrossan, N Ayrshire	19/04/2008
Brick FM	St Boswells, Borders	22/01/2008
Mearns FM	Stonehaven & the Mearns	06/06/2009