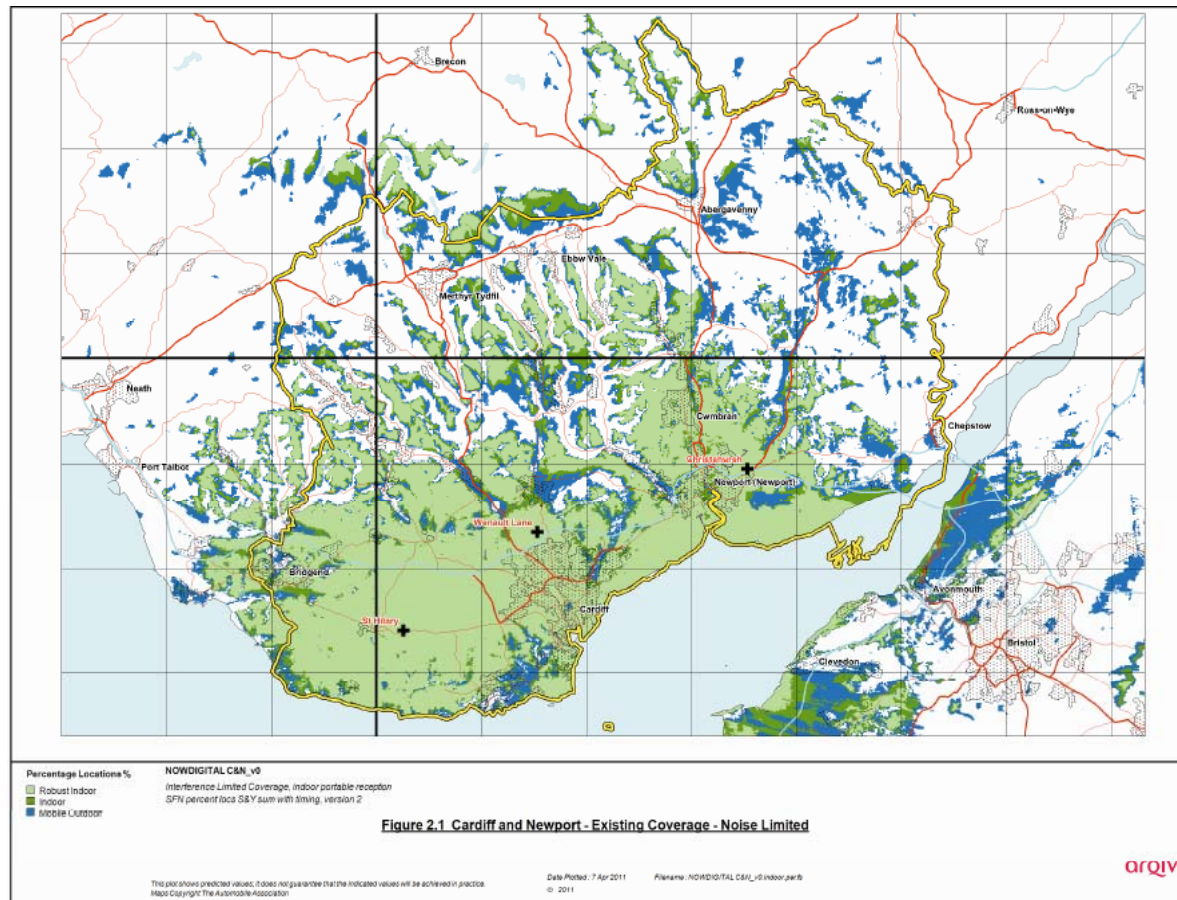
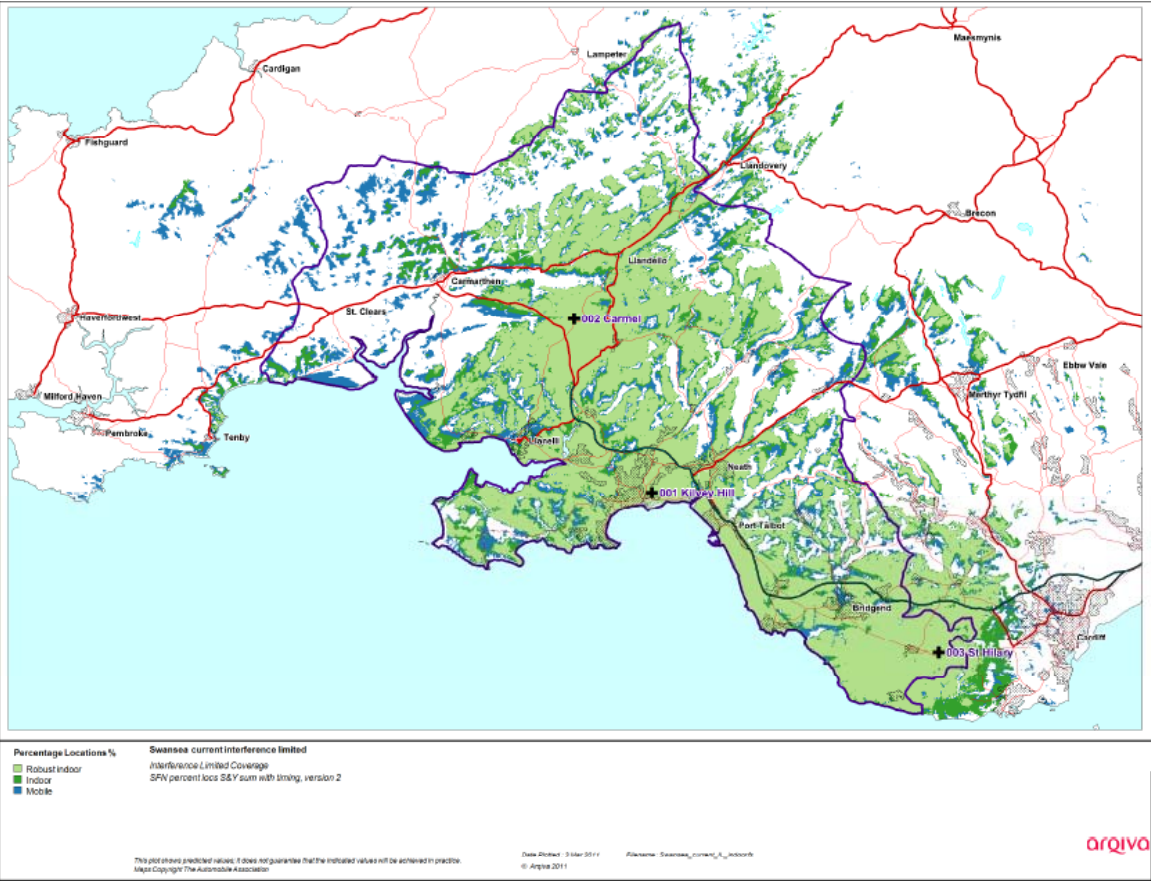


Radio and audio content

Commercial DAB multiplex map for Cardiff and Newport



Commercial DAB multiplex coverage map for Swansea



Wales and Scotland, DAB station availability

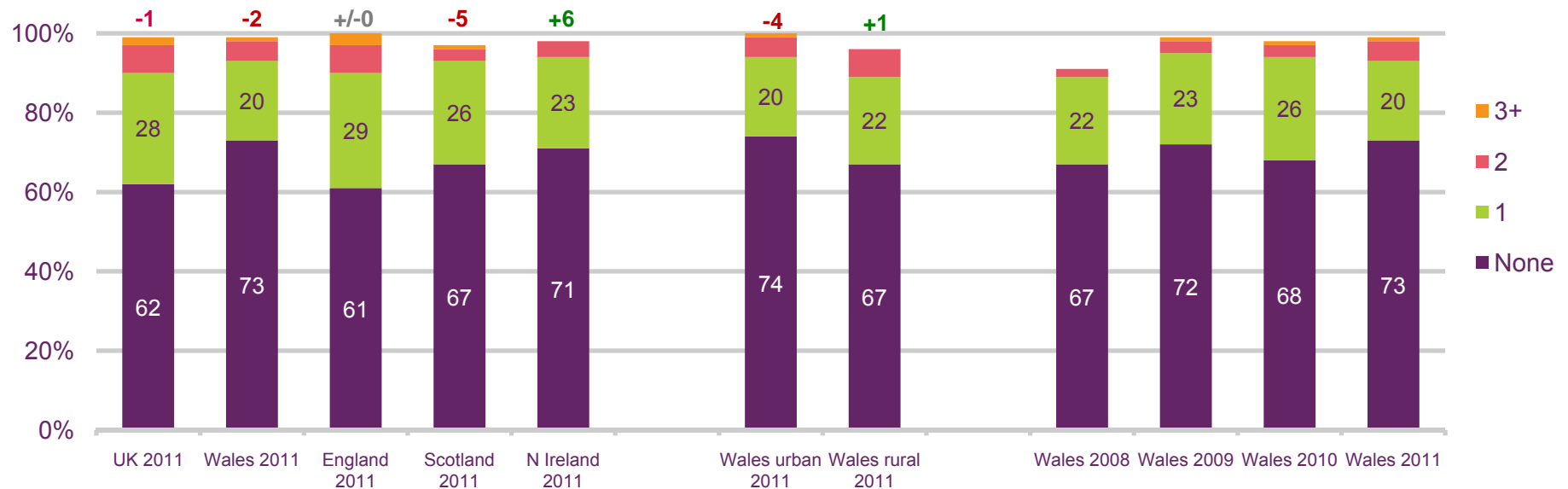
Local DAB multiplex	Number of commercial services carried on the local multiplex	no. commercial services carried on the national multiplex (Digital One)	BBC network/ local and nations
Aberdeen	6	12	13
Dundee and Perth	5	12	13
Glasgow	8	12	13
Edinburgh	7	12	13
Inverness	3	12	13
Central Scotland	7	12	13
Ayr	7	12	13
Cardiff and Newport	7	12	13
Swansea	4	12	13

Source: Ofcom, July 2011

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%	27%	39%	31%	28%	26%	30%	27%	27%	29%	27%
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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?

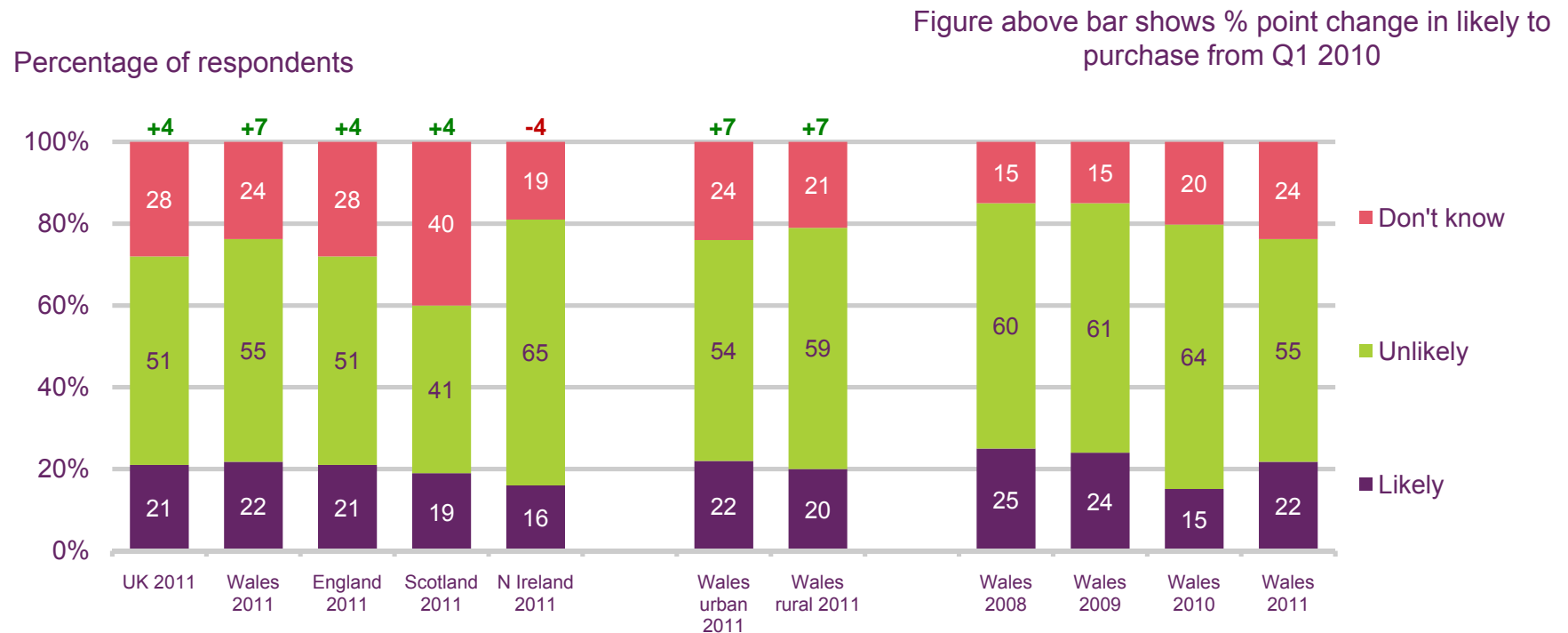
Source: Ofcom research, Quarter 1 2011

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, 397 Wales, 1629 England, 357 Scotland, 428 Northern Ireland, 191 Wales urban, 206 Wales rural, 638 Wales 2008, 848 Wales 2009, 854 Wales 2010, 397 Wales 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



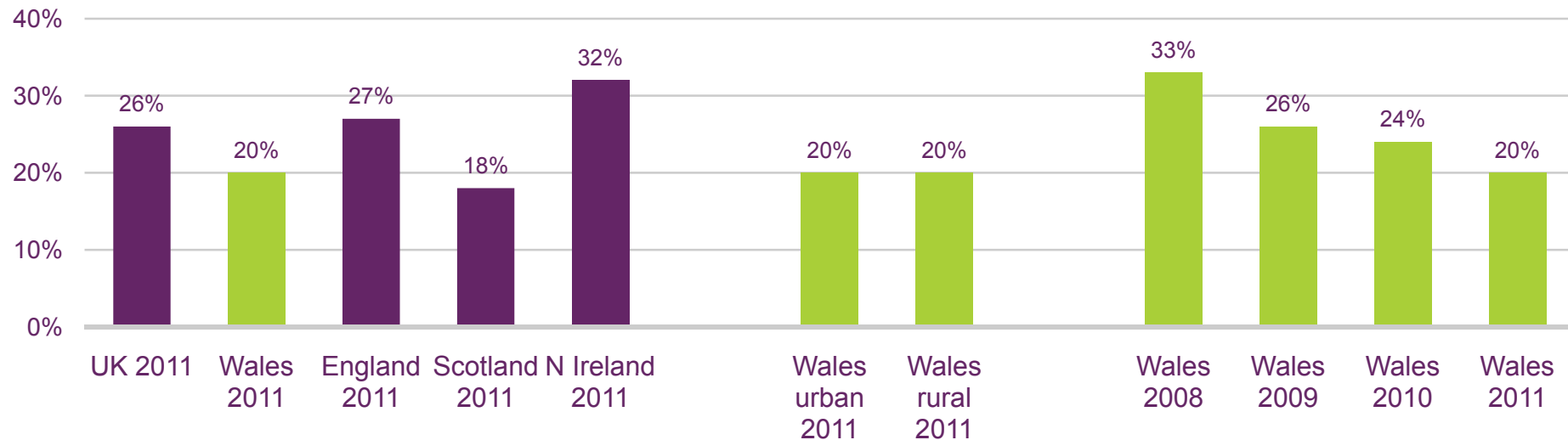
QP12: How likely is it that your household will get a DAB radio in the next 12 months?

Source: Ofcom research, Quarter 1 2011

Base: Adults aged 16+ who listen to radio and do not have a DAB set (n = 1304 UK, 207 Wales, 703 England, 156 Scotland, 238 Northern Ireland, 104 Wales urban, 103 Wales rural, 445 Wales 2008, 607 Wales 2009, 594 Wales 2010, 207 Wales 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)



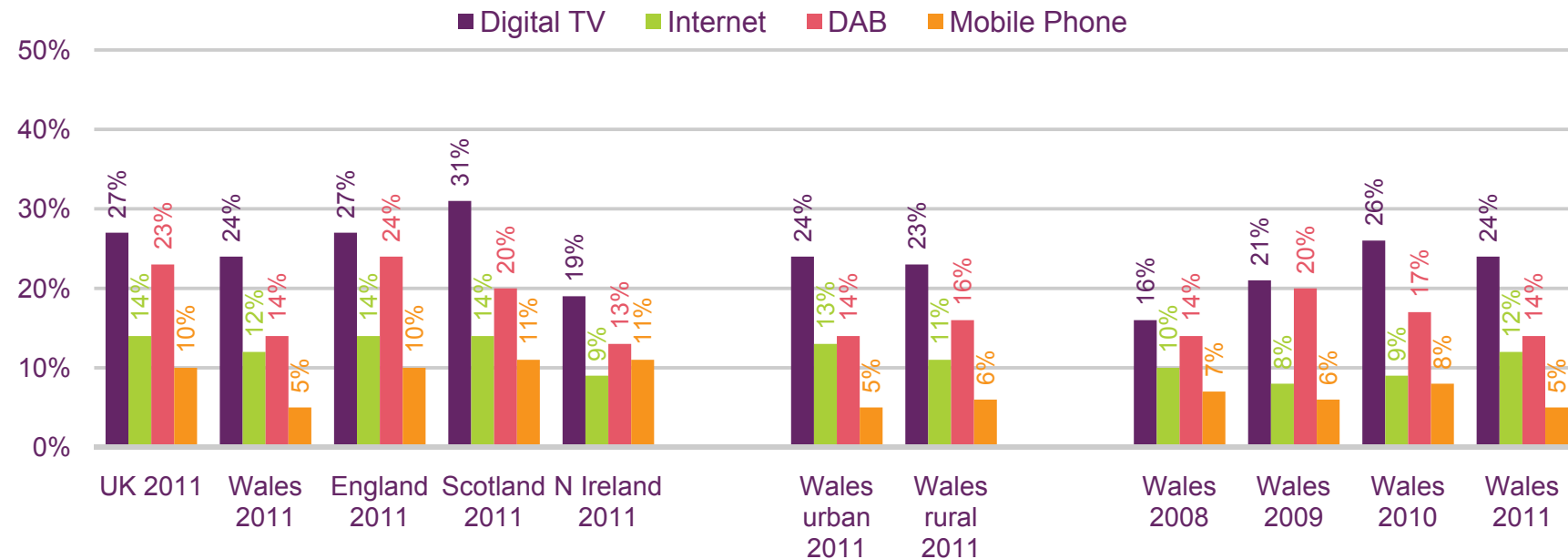
QB2. Do you personally use: MP3 player/ iPod?

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ 3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 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?

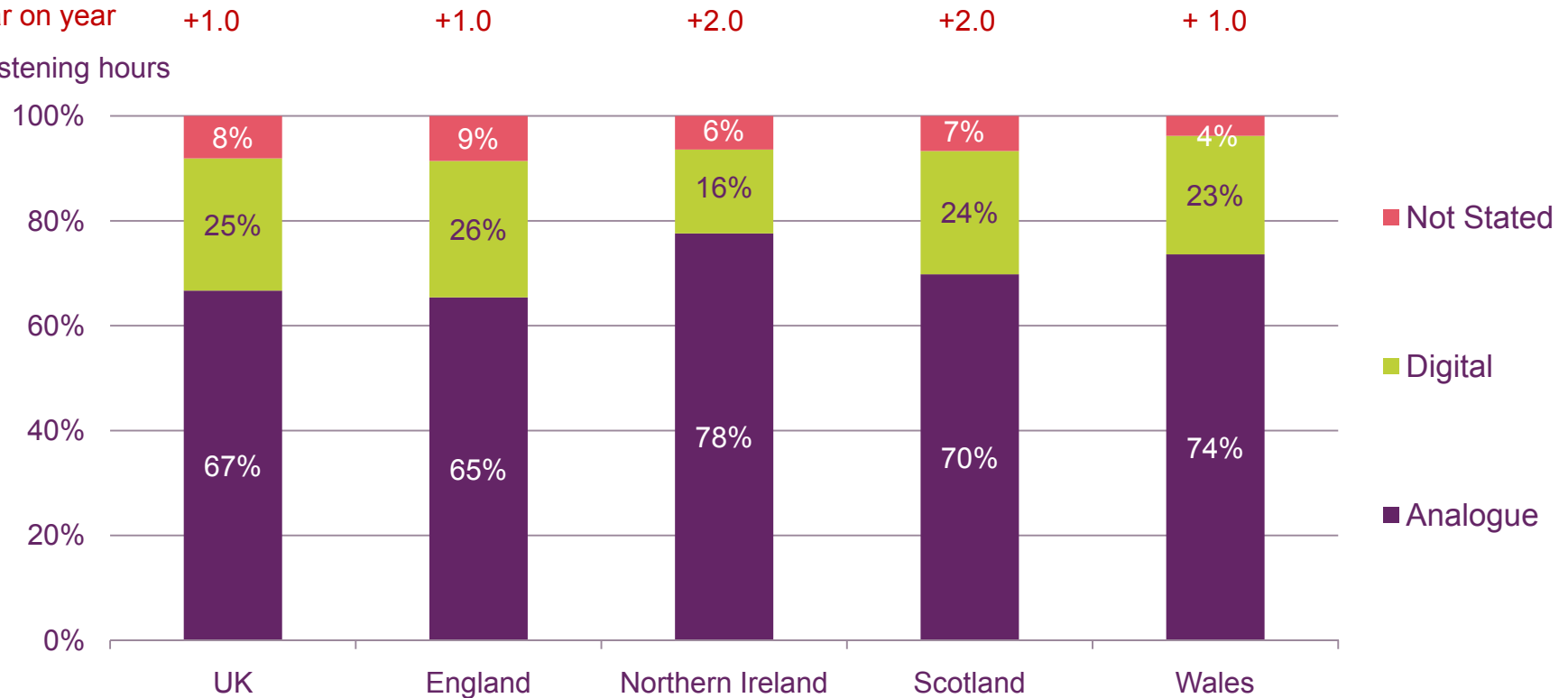
Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011).

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

Digital increase
year on year

% listening hours

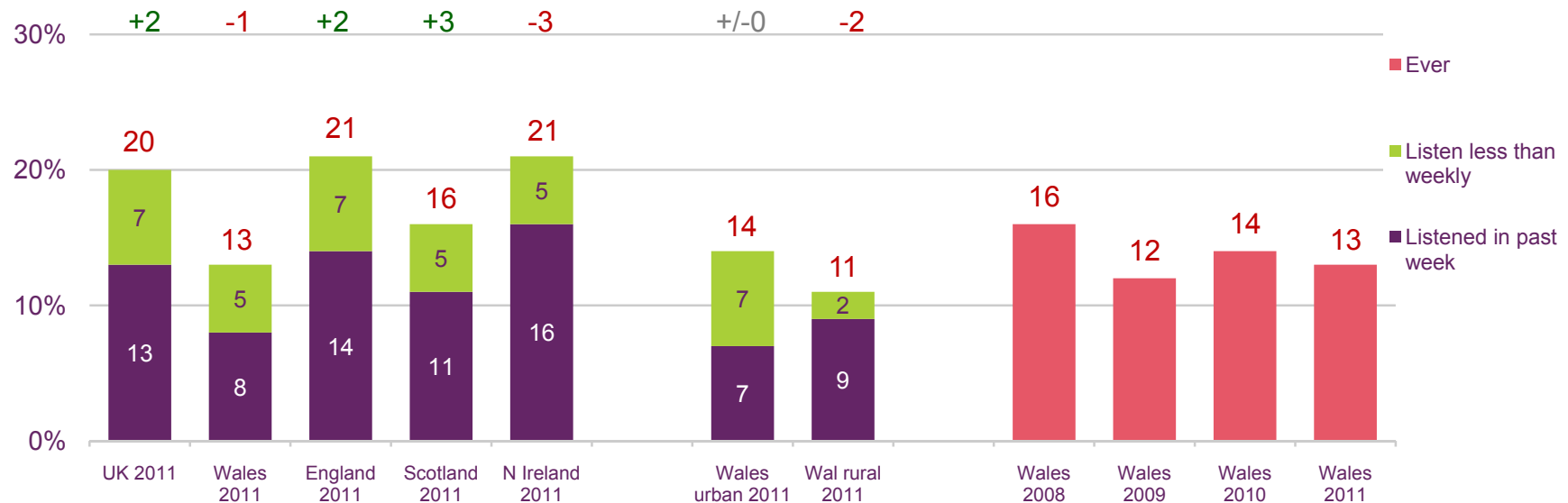


Source: RAJAR, All adults (15+), year ended Q1 2011.

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

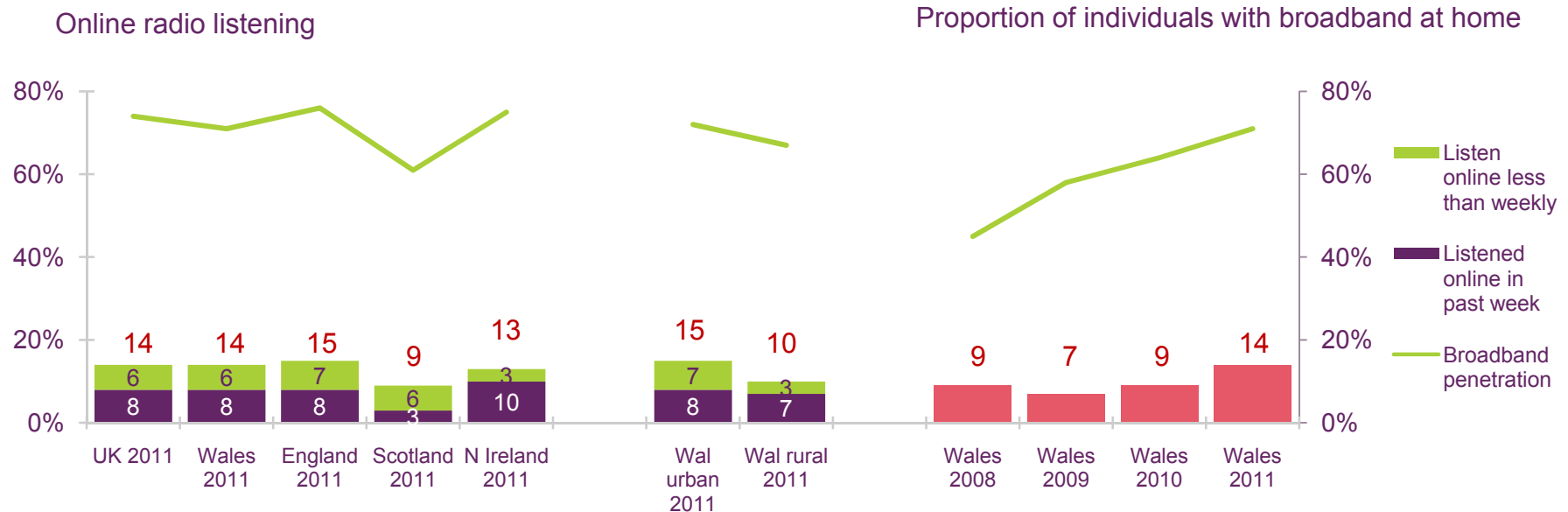


QD28A-B. Which, if any, of the following activities, other than making and receiving calls, do you use your mobile for?/ And, which of these activities have you used your mobile for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data shows the proportion ever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

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

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



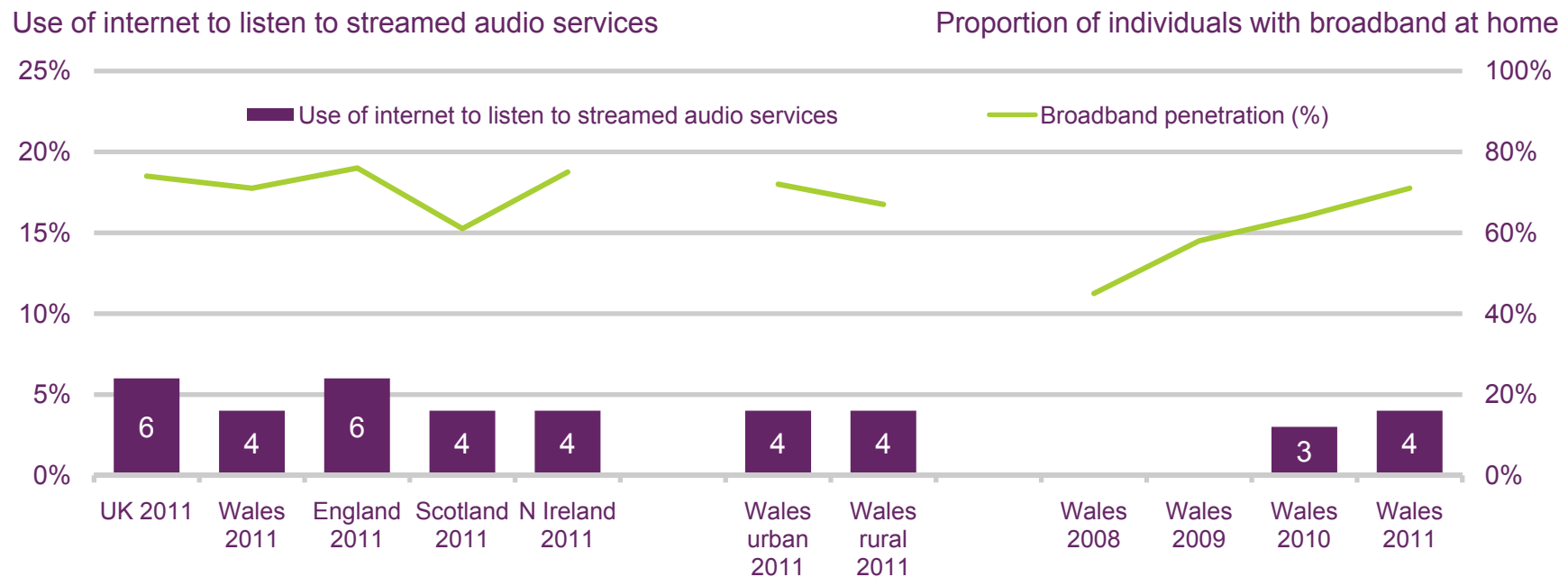
QE5A-B. Which, if any, of these do you or members of your household use the internet for whilst at home?/ And, which, if any, of these activities have you or members of your household used the internet for in the last week? (NB Data for use in the last week not available for 2008 or 2009. Trend data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

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

Source: Ofcom research, Quarter 1 2011

Use of internet for listening to streamed audio services

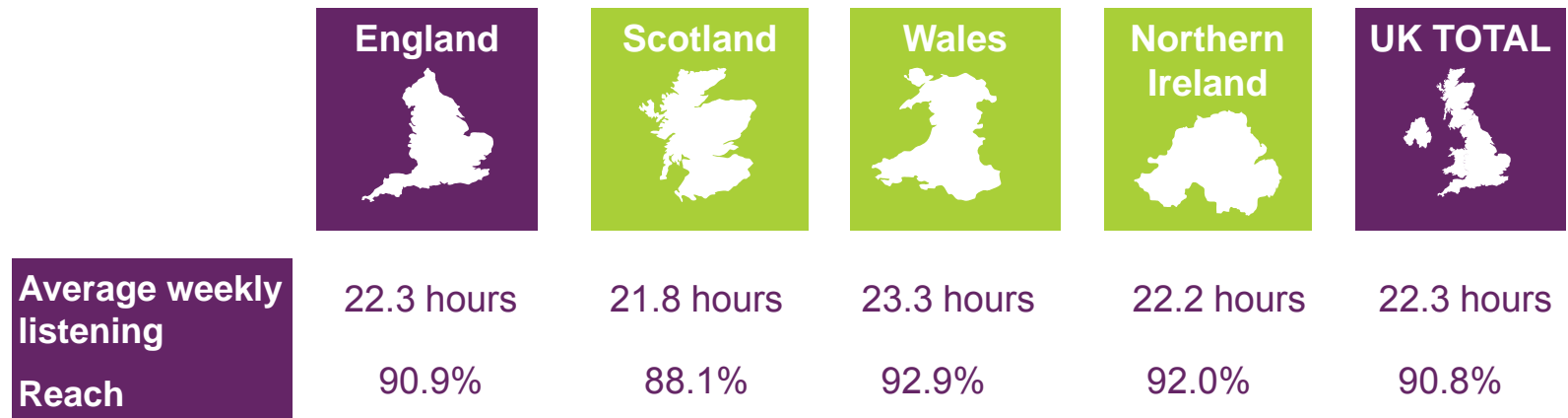


QE5A. Which, if any, of these do you or members of your household use the internet for whilst at home? (NB Not asked in 2008 or 2009)

Source: Ofcom research, Quarter 1 2011

Base: All adults aged 16+ (3474 UK, 493 Wales, 1983 England, 487 Scotland, 511 Northern Ireland, 241 Wales urban, 252 Wales rural, 811 Wales 2008, 987 Wales 2009, 1075 Wales 2010, 493 Wales 2011)

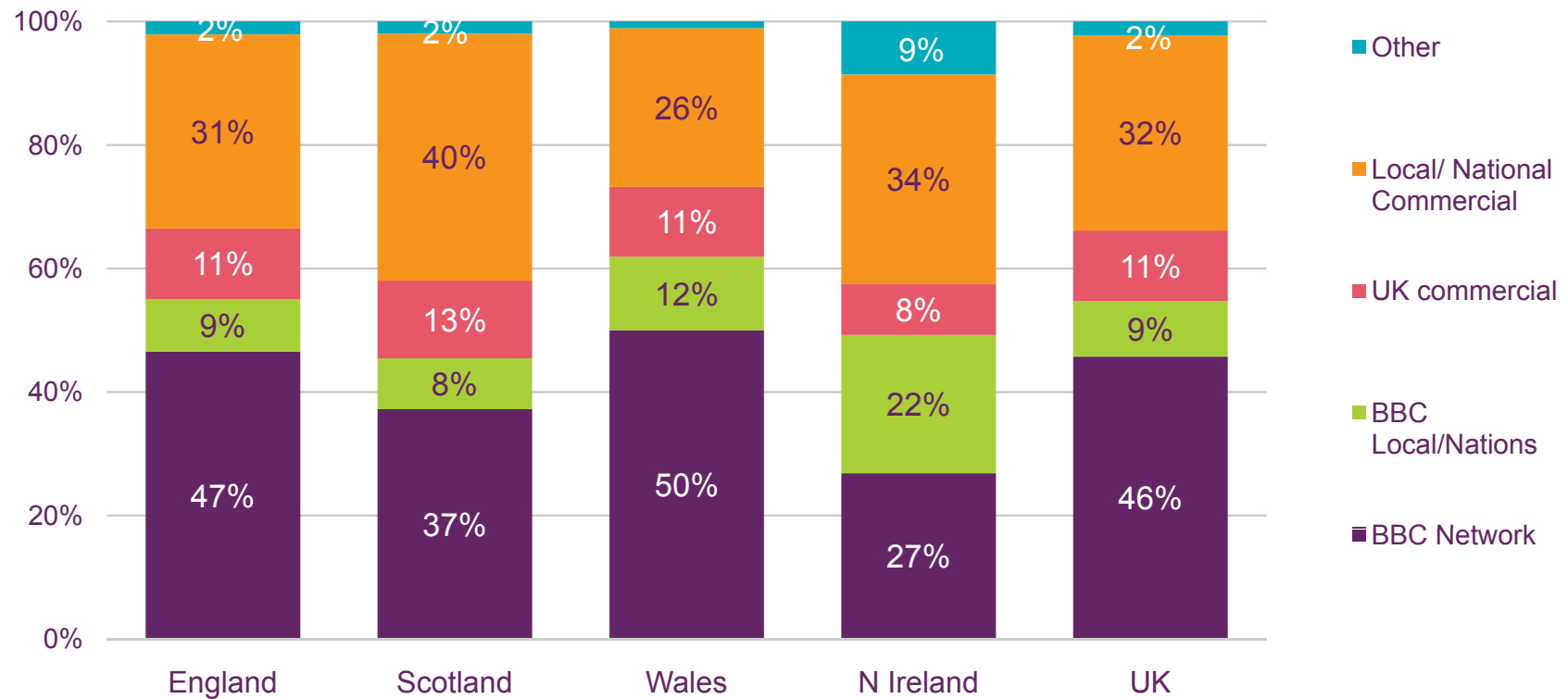
Average weekly reach and listening hours – year to Q1 2011



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.

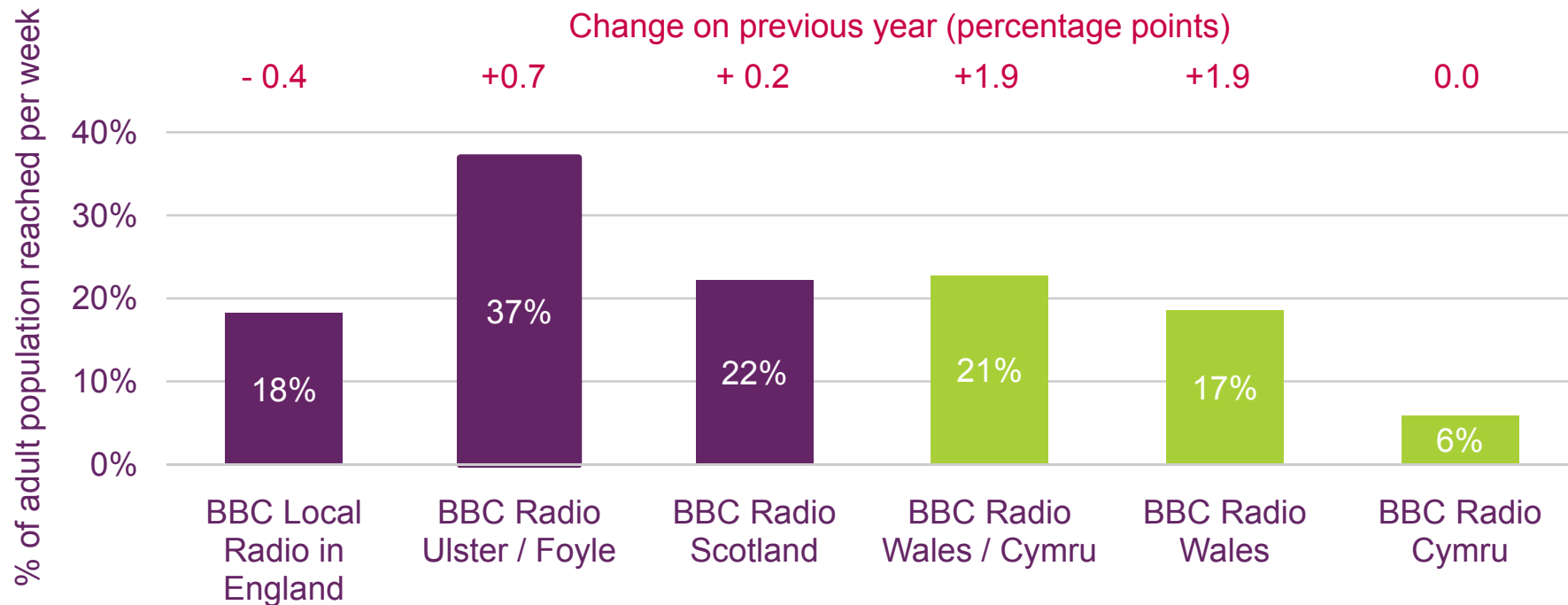
Share of listening hours, by nation

Audience share for BBC and commercial stations, local/national and UK



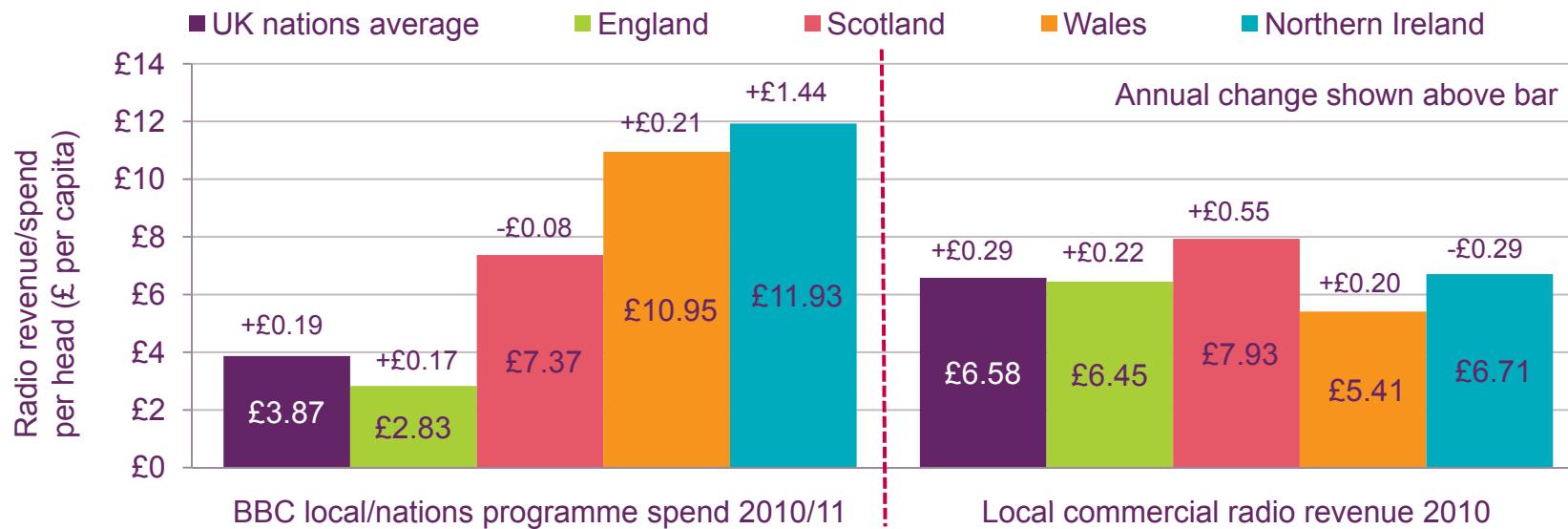
Source: RAJAR, All adults (15+), year ended Q1 2011

Weekly reach for National/local BBC services



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.

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



Source: Broadcasters, 2010

Note: The UK commercial revenue 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.

Wales community awards

Community station	Location	On-air date	Target Audience
BRfm	Brynmawr, Blaenau Gwent	18/10/2007	Geographic - town/rural
Bro Radio	Barry, Vale of Glamorgan	31/03/2009	Geographic - town/rural
Calon FM	Wrexham	01/03/2008	Geographic - town/rural
GTFM Pontypridd	Pontypridd	01/01/2006	Geographic - town/rural
Point FM	Rhyl	24/03/2010	Geographic - town/rural
Radio Cardiff	Cardiff	08/10/2007	BME black & ethnic minorities
Radio Tircoed	Tircoed Forest , Swansea	01/12/2008	Geographic - town/rural
Tudno FM	Llandudno	12/07/2008	Geographic - town/rural
XS	Port Talbot	20/04/2007	Young people (11-25)

Source: Ofcom, July 2010