



The Future of Radio: Localness

An independent report on localness and local
analogue commercial radio

Produced for Ofcom by Essential
Research



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Section 1

Executive Summary

Background

- 1.1 Digital broadcasting has brought increased consumer and citizen choice through new platforms and technologies, offering the prospect of a healthy radio industry in the 21st century.
- 1.2 But it has also meant new strategic and financial challenges for broadcasters: increased choice of platforms and stations has put local analogue commercial stations under pressure from declining revenues.
- 1.3 The existing regulatory model (as set out in the Broadcasting Act 1990 and Communications Act 2003) requires local commercial broadcasters to adhere to a set of programming obligations regarding, inter alia, local output. These programme obligations are set by the broadcasters as part of their application for a station licence but now may be too costly to sustain in an increasingly competitive environment, particularly for smaller stations.
- 1.4 Ofcom is proposing to publish revised guidance which will allow for those stations that wish to do so to reduce the minimum number of hours of locally-made programming (i.e. programming made and broadcast from a studio located in the area to which the station broadcasts) that they provide, when digital listening reaches an appropriate level and so more consumers have the greater choice offered by digital platforms.

Summary of research objectives and methodology

- 1.5 In light of the above, Ofcom commissioned qualitative research to help inform the decision-making process on whether the current guidance and licence obligations relating to the provision of locally-made programming and local material (i.e. content which is of particular relevance to people living in the area to which the station broadcasts) might be changed so as to allow stations to have greater programming flexibility while still securing listeners' interests.
- 1.6 The research had two key objectives:
 - 1.6.1 **Understand localness in the context of local radio:** how local commercial radio listeners currently define their local area; which elements of local radio output are most important and when (vs. other available local/national media sources); attitudes towards where local material is compiled, where it is broadcast from and the location/origin of the presenters.
 - 1.6.2 **Explore future regulatory possibilities:** including an assessment of reactions to five potential regulatory scenarios for local commercial analogue radio.
- 1.7 A deliberative methodology approach was employed for three key reasons:
 - 1.7.1 To ensure that respondents were up to speed with the current regulatory framework and definitions

- 1.7.2 To ensure participants were made aware of the wider context of the pressures facing local commercial broadcasters
- 1.7.3 To explain and discuss in detail the various regulatory scenarios.
- 1.8 Six locations across the UK were selected for the research, to ensure that responses covered all four UK nations, a mix of large city, town and rural locations and varying levels of existing local radio provision.
- 1.9 In each location the sample was equally split by gender and by broad SEG classification (50% ABC1/50% C2DE). Quotas were set against age, reflecting as far as possible the RAJAR profile of local commercial radio listeners. In total 117 respondents took part in the research.

Key findings

- 1.10 Having visited six locations (Dundee, Belfast, Haverfordwest, Plymouth, Lincoln and Liverpool) discussions with the research participants suggested that listeners' experience and expectations of local radio vary widely across the UK:
 - 1.10.1 There were a wide variety of characteristics - geographical, social and media-related - which shaped a different local flavour for each area.
 - 1.10.2 and within each area the attitudes to localness, and subsequently what consumers and citizens required from local media including local commercial radio, varied widely depending largely upon the individual listener's life-stage and whether they lived in a predominantly urban or rural area.
- 1.11 There was consensus across all locations and listener types regarding what local commercial radio does best: delivering 'core, functional' local information, namely traffic and travel, weather, and local news, at the times when it is most needed.
- 1.12 These core local elements are things which all members of the community rely upon and actively seek from local commercial radio, and which other local media are not able to deliver in the way that radio can.
- 1.13 The secondary role of local radio is to provide 'human, engaging' local content, namely coverage of local community affairs and events, phone-ins and competitions. The appeal and consumption of this type of local content varies according to the listener type, but is of particular value to the more community-minded and to speech radio listeners.
- 1.14 In order to assess the relative importance to listeners of local content in the context of **all** types of content that radio delivers, respondents were asked to rank local elements of radio output alongside other generic elements such as music, national news, travel and weather, current affairs, national sport and so on. This exercise demonstrated that for many listeners, core functional local content was deemed more important from their local radio station than national news and was second only to music in their overall ranking of desired output from radio.
- 1.15 There were differences in opinion regarding the value of locally-made content: those driven purely by music were largely indifferent to where music was broadcast from or whether the presenter was from the local area; for others, the very localness of the presenter and the place he/she was broadcasting from was a unique benefit of local

commercial radio and added both to the listening experience and to the individual's sense of local identity.

- 1.16 However, all listener types believed strongly that in the case of core, functional local information such as local traffic and travel and local news, the quality and relevance of such information was enhanced by the fact that it is broadcast from the local area by local people.
- 1.17 When we presented respondents with a range of potential regulatory scenarios, we found that most were surprised and concerned at the prospect of a reduction in the amount of local material and locally-made programmes their local commercial station may deliver in the future.
- 1.18 Respondents also expressed concern from the citizen viewpoint at the possibility of reduced local output, citing those who lived in rural areas, the elderly, shift workers and the local economy as elements of the local area which would suffer.
- 1.19 The majority of respondents (of all types) opted for a model as close to the status quo as possible, but relaxed this when informed that the current framework may not be financially sustainable for local commercial broadcasters.
- 1.20 In some cases, the degree to which the local station was felt to be part of the community, or the existence of only one or two local stations in the area, meant that listeners were unwilling to see a reduction in local material and locally-made programmes even given the financial challenges.
- 1.21 In other cases, amongst music-driven listeners (in particular younger music-driven listeners who tend to compare their local stations with national music radio services) or in areas where there were a number of available local commercial stations, listeners were comfortable with a more relaxed regulatory scenario, and focused more on the impact the new regulatory framework would have on the quality of local output.
- 1.22 For all listeners, there was a basic requirement for local material and locally-made programmes which covered their need for core, functional local content at the times they most needed it.
- 1.23 When discussing potential alternatives to local material and locally-made programmes in the context of a reduced regulatory requirement, respondents could find few or no positives as none of the suggested alternatives offered a like-for-like replacement of localness and the intrinsic benefits that localness is perceived to bring.
- 1.24 The possibility of cost savings leading to the replacement of local presenters with a high profile networked presenter was also largely rejected on the grounds that high profile presenters are already accessible on syndicated commercial or BBC national services, and in any case such a policy would go no way towards replacing the localness it had caused to disappear.

Section 2

Research objectives and methodology

Research objectives

- 2.1 As part of the *Radio – Preparing for the future - Phase 1* consultation in 2004, Ofcom commissioned quantitative and qualitative research which included a dedicated section defining elements of 'localness', evaluating their relative importance, and assessing radio's role in delivering localness versus other local media¹.
- 2.2 Research was also commissioned to explore in more depth respondents' attitudes to the existing provision of local material and locally-made programmes by their local radio stations.
- 2.3 The current research project, as part of Ofcom's Future of Radio consultation, aimed to revisit the subject of localness and local radio and in the context of these updated findings to engage respondents in a discussion concerning **future** regulation of local analogue commercial radio, in order to help inform the decision-making process. Ofcom commissioned independent research agency, Essential Research, to conduct the research on its behalf - all fieldwork was conducted by Essential Research.
- 2.4 The objectives for this research were thus twofold:
 - 2.4.1 To revisit the subject of localness and to explore, with specific reference to local analogue commercial radio:
 - How consumers and citizens define 'local' and localness.
 - What the component parts of localness are and their relative importance.
 - The role of radio in the provision of localness and its component parts, versus other media.
 - At what times during the day local stations are required/expected to be local.
 - Attitudes towards where local material is compiled, where it is broadcast from and the location/origin of the presenters.
 - 2.4.2 To explore future regulatory expectations and possibilities, and specifically to assess reactions to five potential regulatory scenarios for local analogue commercial radio, each representing differing levels of required local material and locally-made programmes.

Research methodology: rationale

- 2.5 In order to meet these research objectives effectively, a methodology was required which would:

¹ Ofcom, 2005. *Radio - Preparing for the Future: Phase 1: Developing a New Framework, Appendix B: results of audience research*

- 2.5.1 ensure that respondents were made aware of the various terms and definitions surrounding radio regulation and local material/locally-made programmes, and understood the existing regulatory framework;
 - 2.5.2 enable respondents to engage with the issues facing policy-makers by encouraging them to think not only from their individual perspective (as consumers) but also from that of the wider community (as citizens) and from the point of view of broadcasters;
 - 2.5.3 allow sufficient time to brief respondents on the existing regulatory situation and the challenges facing commercial broadcasters, and to share and discuss with them the five potential regulatory scenarios for local commercial analogue radio.
- 2.6 In light of these requirements, a **qualitative, deliberative** research methodology was chosen.
- 2.7 The deliberative methodology is suited to projects which require respondents to consider different perspectives from their own, to digest new, often complex information, and to discuss this with their peers, before forming a judgment.

Stimulus: factual presentations and regulatory scenarios

- 2.8 The objective of evaluating respondents' reactions to a number of potential regulatory scenarios for local analogue commercial radio could only be effectively met if respondents were fully aware of the existing regulatory framework and of the challenges currently facing local commercial radio broadcasters.
- 2.9 Ofcom developed a 10 minute factual presentation, tailored to each of the six locations, for use in the sessions. The presentation described the current situation regarding local analogue commercial radio regulation, explained the terminology surrounding 'localness' on radio, and highlighted the financial challenges facing local commercial radio broadcasters.
- 2.10 An example presentation is available in Appendix 1
- 2.11 Ofcom also provided five potential regulatory scenarios for presentation (Appendix 2) and discussion with respondents.

Figure 1 Five potential regulatory scenarios used as stimulus

Scenario 1	
Locally-made	Local content
None	None

Scenario 2	
Locally-made	Local content
None	News, weather, travel etc. through daytime
Note: by 'daytime' we mean 6 a.m. to 7 p.m. weekdays and 8 a.m. to 2 p.m. weekends	

Scenario 3	
Locally-made	Local content
Breakfast	Breakfast, plus news, weather, travel etc through daytime
Note: by 'daytime' we mean 6 a.m. to 7 p.m. weekdays and 8 a.m. to 2 p.m. weekends	

Scenario 4	
Locally-made	Local content
4-13 hours depending on size of station	4-13 hours depending on size, plus news, weather, travel etc through daytime
Note: under this scenario, the number of hours will vary depending on the size of the station's listener population, but the number of hours of locally-made and local content will be equal to or less than the current requirement, but not more	

Scenario 5	
Locally-made	Local content
No change from current requirement	No change from current requirement

Session structure

- 2.12 The sessions involved a number of moderated discussion groups using flipchart capture and card mapping exercises, interspersed with the factual presentation and presentation of the five potential regulatory scenarios to the whole group.
- 2.13 Respondents were also asked to complete a short paper questionnaire at the start and end of the session.
- 2.14 Data from the questionnaires was not intended to form a quantitative study; the questionnaire data was used solely as a means of verifying each respondent's radio consumption habits, and validating or challenging findings from the group discussions.
- 2.15 In order to allow sufficient time for presenting the factual material and the scenario stimulus, each deliberative session lasted between 3 and 3 ½ hours.

Figure 2 Outline of deliberative session structure



Locations and sample

- 2.16 Six deliberative sessions were conducted in locations selected by Ofcom to cover a wide geographical spread across the UK, to reflect differing local radio markets (in terms of population size and number of available local commercial radio stations), and to represent each of the four UK nations and a mix of big city, town and rural locations.

Figure 3 Map of locations visited



- 2.17 A broad sample of local commercial radio listeners aged 16+ was recruited. Local commercial radio listeners were defined as listening regularly to at least one of the available local analogue commercial stations in each location.
- 2.18 In order to reflect peak radio listening volume, quotas were set to ensure that at least 50% of the sample in each location listened to local commercial radio between 6 a.m. to 10 a.m., or 4 p.m. to 7 p.m.
- 2.19 In each location the sample was split equally by gender and by broad SEG classification (50% ABC1/50% C2DE).
- 2.20 Quotas were set against age, reflecting as far as possible the RAJAR profile of local commercial radio listeners in each area.
- 2.21 The target sample size for each session was 18 respondents; in most locations this target was exceeded.

Figure 4 Summary of sample sizes and profiles by location

Venue	Date	Male	Female	16-44	45+	Total
Liverpool	June 26th	10	10	11	9	20
Lincoln	June 28th	11	9	13	7	20
Dundee	July 2nd	9	8	10	7	17
Belfast	July 4th	10	10	14	6	20
Plymouth	July 18th	10	10	13	7	20
Haverfordwest	July 19th	8	12	10	10	20
Total		58	59	71	46	117

Section 3

Scene-setting: localness and local identity around the UK

Differences in perceptions of 'local' between locations visited

- 3.1 Before exploring issues surrounding localness on local commercial radio, we discussed with respondents their views regarding their local area and how far they felt a sense of local identity.
- 3.2 We found that perceptions varied widely between each location, driven broadly by:
 - 3.2.1 the (perceived) geographical size of the area;
 - 3.2.2 whether the location was predominantly urban or rural;
 - 3.2.3 the social complexion and perceived 'health' of the community;
 - 3.2.4 the transport infrastructure in and around the area;
 - 3.2.5 in Scotland, Wales and Northern Ireland, the relative importance of national identity;
- 3.3 We also noted wide variations in terms of the existing local media provision i.e. the number of available local commercial stations, and the prominence of other local media such as local press.
- 3.4 All of these differing characteristics will be seen to impact to some degree on listeners' attitudes to localness on local commercial radio.

Key characteristics of locations visited

3.5 The following tables briefly summarise the differing characteristics of each location.

Liverpool (Wirral)

- Wirral is felt to be a separate entity from Liverpool: Liverpool is not the centre of the community and the Mersey tunnels act as a physical and notional boundary.
- A semi-rural outlook: many spoke of the Wirral's natural beauty.
- 'Local' was defined as the individual's neighbourhood e.g. Bebington, Prenton; and its local park, pub, schools, shops, hospital and church.
- Many spoke of the 'friendliness' of their local area, and some felt a sense of responsibility towards the community with older residents/parents expressing concern about the welfare of young people in area (youth centre closures, etc.)
- Liverpool City of Culture 2008 is an example of a 'local' topic generating strong opinions both optimistic and pessimistic.
- A wide range of stations is available, both local and across the North West, and many are used to the fact that some regional commercial stations are based in Manchester.
- A wide choice of local press titles available.

"if you're from Liverpool you're a Scouser...if you're from the Wirral you're not" (M 45+)

Plymouth

- A community-minded group with a deep affection for and interest in their area: all spoke of the beauty of the natural surroundings, Plymouth's naval heritage, etc.
- Plymouth is a centre for work for most, but many live in small outlying villages: these are their 'local' area. Interaction with Plymouth town is sporadic, and some see Plymouth as less socially harmonious than their own village.
- The village outlook means that word of mouth plays an important role.
- A well developed local events programme exists, driven by fair weather and new naval families looking to integrate.
- Very limited transport infrastructure exists around Plymouth itself with only two main roads in and out of town.
- Plymouth Sound dominates local commercial landscape; older listeners favour Classic Gold on AM.
- BBC Devon received little spontaneous mention amongst this primarily commercial radio listener sample.

"we're the biggest village in the country" (Male 45+)

"the nicest place in England" (Female 16-44)

Belfast

- A collection of strongly-defined neighbourhoods within the city and outside.
- A marked sense of family network amongst both young and old.
- 'Local' is their neighbourhood; but also strong affection for and connection with Belfast city and indeed the whole of Northern Ireland.
- Feeling of rejuvenation after Troubles: physically reflected by recent investment and city development.
- Pubs and live music a key part of social scene for younger/students, and church for older residents.
- A wide range of local commercial stations adds to a sense of a big, diverse city.
- Respondents were very positive towards BBC Ulster (much more so than those in Scotland and Wales were towards their own BBC national stations).
- Well-developed local and regional press provision in place.

"ten years ago you say you're from Belfast and people look at you funny...now we're a cosmopolitan, tourist city" (Female 16-44)

Lincoln

- A hybrid: a cathedral city but with rural communities immediately surrounding it; thus farming and rural affairs are near the top of the local agenda
- 'Local' means the rural community first and foremost so 'local' topics include schools, events, doctors and pubs.
- Visits to Lincoln itself are frequent (work, shopping, entertainment etc.) but the city does not appear to define people's identity as much as the county.
- This strong Lincolnshire identity was accentuated at the time of the research by recent flooding in parts of the county.
- Transport infrastructure is limited, with mainly 'B' roads and branch railway lines to rely on.
- Lincs FM is the only recognised local commercial station and the most regularly listened to.
- A number of long-established local newspapers exist in Lincoln and neighbouring towns.

"I live in a small village and Lincoln is the nearest city but I feel part of Lincolnshire"
(Female 45+)

Dundee

- Scotland's fourth largest city, but immediately surrounded by rural areas.
- A mixture of town and country dwellers with differing opinions on what is 'local'.
- Angus and Tayside also forms part of their definition of their local area.
- Rural dwellers' 'local' area is smaller and has a strong community feel, whereas city dwellers believe community spirit does not exist/has been lost.
- All spoke of the city's crime, drugs, poverty and housing issues: a concern which appeared to bind the community.
- Tay road bridge is an important transport hotspot.
- They feel well served with 3 local commercial stations; Tay FM the dominant music provider.
- BBC Scotland polarises: some value Scottish coverage; others feel it is too Edinburgh/Glasgow-centric.
- Dundee 'Tele' a popular local paper, published daily (morning and evening).

"the city has lots of drug crime, there are also other problems like not enough decent housing to go round. People like to keep up to date on what is improving or getting worse " (Male 45+)

Haverfordwest

- The most community-oriented location we visited.
- 'Local' starts at town or village level, but extends to the county, with an almost island-like allegiance to Pembrokeshire.
- A close-knit community: all regularly visited/had friends and family in villages and towns across the county, and newcomers spoke of the welcoming atmosphere.
- Local topics include farming and shipping, and the impact of the gas pipeline at Milford Haven: more interest here in local politics than other areas visited.
- One road – A40 – the main transport artery; Cleddau Bridge another essential transport feature in the county.
- A Welsh but not predominantly a Welsh-speaking county.
- Radio Wales features but felt to be very Cardiff-centric: there was a feeling of being slightly overlooked by all national (i.e. UK and Welsh) media.
- Radio Pembrokeshire the only local analogue station although the area is also covered by regional commercial service, Real Radio, from Cardiff; many felt a strong sense of 'ownership'/protectiveness of a station which has not long been in existence.
- Only one local paper mentioned.

"we're the forgotten corner of Wales!" (Female 16-44)

Section 4

Listener types and differing relationships with local radio

Key differences between listener type within each location

- 4.1 As well as differences in attitudes to the local area *between* locations, the research highlighted differences *within* each location, depending upon the individual characteristics of the listener we spoke to.
- 4.2 These characteristics determined not only the individual's perceptions of the local area, but also the role and perceived value of local radio.
- 4.3 Two key differences were identified:
 - 4.3.1 The listener's life-stage
 - 4.3.2 Whether the listener lives in a predominantly rural or urban area

Key listener types: lifestage

- 4.4 **Younger listeners, those without children in the household, and the more geographically mobile (students, moving from place to place through work)** tended to be less concerned about local issues per se and only felt a need to connect with local information sources when there was a specific need, e.g. when in the market for property, jobs, or (in the future) schools for their children.
- 4.5 In terms of radio consumption, radio is about music first and foremost; they tend to be song-driven and very promiscuous in their listening where there are numerous stations available, moving between local and national music providers.
- 4.6 Listening tends to be scheduled or follows clear routines; i.e. when driving to or from work, multi-tasking in home or getting ready to go out.
- 4.7 Some worked in radio-friendly environments such as shops or warehouses so for them listening could happen throughout the day.
- 4.8 They are more demanding of media generally; and specifically in terms of perceived quality of local presenters. This is because they are often comparing local radio directly with national music radio which has a higher perceived quality:
- 4.9 **Older listeners, those with families and longer-term residents** tend to have a keener sense of their area and its history (with some expressing the view that their community has fragmented recently). These listener types were more naturally interested in community issues such as local events, local politics and so on.
- 4.10 For those with young families the importance of a local information network is heightened, whether in terms of daily travel issues affecting the school run or school closures in times of adverse weather conditions, or more generally in terms of choosing a local school for their children.
- 4.11 Retired people are particularly reliant on social networks and local media.

- 4.12 In terms of radio consumption, music is still key but they are more likely to enjoy speech and 'human', interactive content such as competitions, phone-ins and community-focused magazine items.
- 4.13 Unlike most younger/working listeners, listening can happen all day, and into the evenings.

Key listener types: urban versus rural residence

- 4.14 The second key variable driving differences in the research sample's attitude towards the local area and specifically towards local commercial radio was whether the individual (regardless of lifestage) lived in a predominantly urban or rural area.
- 4.15 **Urban dwellers** rely less on local radio to deliver local information – this information is readily available from a range of sources including local newspapers/ magazines/billboards, local websites and word of mouth from friends/ family or at work.

"I like to listen to local radio in the morning but after that I usually read the newspaper or look on the internet when it is quiet at work" Male 16-44
Liverpool

- 4.16 As a result they are more likely to overlook and take for granted the value of local information delivered by local radio compared to rural dwellers.
- 4.17 **Rural dwellers**, both young and old, rely more on local radio to deliver local information – due to a limited network of neighbours, radio is particularly important to them in times of crisis (floods, heavy snow, road closures etc)
- 4.18 Furthermore, those living in rural locations are more likely listen to local radio for a sense of belonging and involvement in the local community.
- 4.19 And they are more likely to rely more heavily on local radio for travel information in nearby towns and cities

"In a rural area we depend more on local radio for information because we are so scattered, for some people it is their only outside contact as they rarely get to the town" Female 45+ Haverfordwest

Key listener types: other variables

- 4.20 A proportion of our sample described their radio listening as **music-driven**. Music-driven listening is primarily a matter of personal preference than a function of age, lifestage or other variables such as urban/rural location, and as such was not a key driver of attitudes towards the overall role and value of local radio.
- 4.21 Although music-driven listeners were slightly more likely to be younger (<44 years), listening to a mix of local commercial and national radio services, the music-driven category also included those aged 45+ who enjoy AC/Gold and Classical, as well as Pop/Rock, formats via local commercial and national radio services.
- 4.22 Those living in areas with a wide choice of local commercial stations (for example, Belfast) are more likely to take for granted the local information provided by their local stations, and can be more critical of individual stations in terms of perceived quality.

- 4.23 In areas with fewer, or in some cases only one, local commercial station, the converse is true and listeners tend to be satisfied with the role and quality of their local commercial station(s).
- 4.24 A minority of individuals in each sample were relative newcomers to the area. Local commercial radio is cited by them as a key means of integration into the area, not only providing information that is important to them (local events, social networks, politics etc.) but also communicating a feel for the 'character' of the area via its presenters, community features and indeed the local advertising it carries.

Section 5

Local content: needs and expectations from local radio

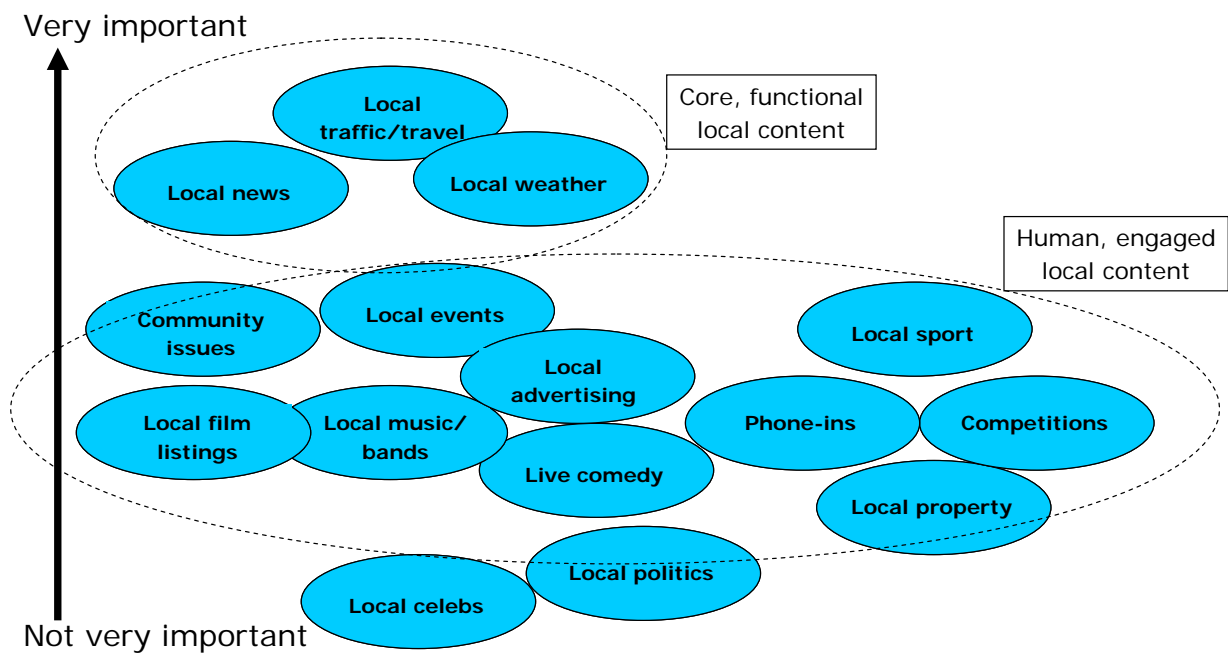
Background

- 5.1 A key objective of the research was to explore what type of local content people in each location regarded as being important to them, and specifically how important it is to them that local radio delivers such content.
- 5.2 Gathering firstly spontaneous responses, and then using card prompts, respondents were asked what they considered to be key local issues and information, and to rank them in order of importance.
- 5.3 Then we asked them to discuss how important it was to them that local radio should deliver each type of local content.

Local elements required from local radio: key findings

- 5.4 Two distinct types of local radio content were identified from these exercises:
 - 5.4.1 **Core functional content: local traffic and travel, local weather and local news.** Of interest and importance to all listener types and seen as crucial elements of local radio output by the majority of listeners in all locations visited.
 - 5.4.2 **Human, engaged local content: local community issues, local entertainment, and locally-themed chat shows and competitions.** Varied in perceived importance depending upon the lifestage and personal tastes/needs of the listener. Thus community issues were of interest to the more community minded/those in rural areas; phone-ins for older, speech radio listeners; sports coverage for sports fans; etc.

Figure 5 Relative importance of local content delivered by local radio



5.5 In all locations, and regardless of the listener’s lifestage or urban/rural residence, core functional local content was cited as **indispensable** content that local radio must deliver, and upon which the majority of members of a community **rely** to some degree or other:

- Local traffic and travel:

“there’s only two main roads in and out of town, so it’s the difference between being an hour late for work or not” Male 16-44 Plymouth

- Local weather:

“it actually affects what you’ll wear that day” Female 16-44 Belfast

- Local news:

“things that the bigger stations are never going to cover but they’re important to us”

Female 45+ Haverfordwest

5.6 In order to assess the relative importance to listeners of local content in the context of **all** types of content that radio delivers, we conducted a mapping exercise asking respondents to rank local elements of radio output alongside other generic elements such as music, national news, travel and weather, current affairs, national sport and so on.

5.7 This exercise demonstrated that for many listeners, core functional local content was deemed more important from their local radio station than national news (and was second only to music in their overall ranking of desired output from radio)

"I want the local news first, the Scottish news second and the national news third – this is the best order for me on the radio, tell me what is going on here first"
Female 45+ Dundee

Local content: the citizen viewpoint

5.8 When considering the **citizen** viewpoint, core functional local content lost none of its importance. Respondents regularly commented that certain members of the community – shift workers, nurses, those in shipping and farming – had an equal (if not greater) need for such content at differing times of the day.

5.9 The citizen perspective also brought into the foreground the role of human engaged content for certain sections of the community, in particularly the elderly, those at home with young children and generally those who rely more on local radio for company and a connection to the local community.

5.10 In this context the idea of local radio giving something to the community's citizens was seen as one of its more valuable roles:

"The local station cares about their area and often goes out into the local community to raise money for charities – for example darts and domino nights to raise money for Dundee's Caring for Kids Charity"
Female 45+ Dundee

Time of day local content most required

5.11 We asked respondents to discuss at which times of the day it was important to have local content provided to them by local radio.

5.12 Again we found that there was a difference in requirement depending on the type of local content in question:

5.12.1 Core functional local content was deemed to be **time-critical**, with particular importance around and during the daily commute to/from work or the school run.

5.12.2 At these times listeners **actively** seek core local content from their local radio:

"I'll tend to listen to music on the way in to work but I'll always flick over to the local station on the hour to check what's going on"
Female 16-44, Lincoln

5.12.3 Human engaged local content such as local speech content, competitions and phone-ins, were seen as less time-critical.

5.13 The following chart summarises the importance listeners attached to receiving core functional local content by time of day.

Figure 6 Importance of core functional local content by daypart

Time	Importance	Core functional content	Other local listening
6 a.m. - 10 a.m.	HIGH	"Plan the day": Traffic/travel/weather Local and national news	Some (younger) opt for music from nationals but tune to locals on the hour. Very important in rural areas for school closures/poor weather
10 a.m. - 1 p.m.	MEDIUM	Hourly local news updates and flashes	Music for parents at home/ workers. Some (older) enjoying local speech
1 p.m. - 4 p.m.	MEDIUM	Music; news updates and flashes	Older/housebound enjoy local phone-ins, competitions and magazine items
4 p.m. - 7 p.m.	HIGH	(3 p.m.- 5 p.m.) School run: traffic info. (6 p.m. - 7 p.m.) Commute home from work: music, traffic and news updates. "My evening briefing"	Older/housebound enjoy local phone-ins, competitions and magazine items
7 p.m. - 10 p.m.	LOW	TV dominant: "A time to relax" Some noted that local content stopped entirely at this time	(Younger) listen to nationals for music. Some older listening to local phone-ins/community-based shows
10 p.m. - 1 a.m.	LOW		Some (esp. older) enjoy local phone-ins and magazine items at bedtime
1 a.m. - 6 a.m.	LOW		Important for farming/ shipping and shift workers

Delivering local content: local radio vs. other local media

- 5.14 We discussed with respondents the role of local radio in delivering local content as opposed to regional television, local press and the internet.
- 5.15 As a **medium**, radio was perceived to be ideally suited to delivering time-critical local content as it could provide frequent updates and is accessible throughout the day at home, at work and crucially in the car.
- 5.16 Conversely, although respondents cited local press as being the most 'local' of media in terms of in-depth coverage and community listings, they asserted that it cannot compete with local radio in delivering time-critical local content because as a medium it does not possess the element of 'liveness' and it is less accessible in a variety of places such as whilst driving or at work.
- 5.17 A secondary advantage of radio as a medium in delivering local information was the element of serendipity it offers: some listeners spoke of how they heard about upcoming local events whilst listening passively during the day or evening.
- 5.18 The other media discussed, local/regional television and the internet, were not seen to be as well suited to delivering core functional local content as local radio because they were felt to be limited in terms of either not being updated frequently enough, or simply not being 'local' enough.
- 5.19 The following tables summarise how respondents viewed other local media relative to local radio in terms of delivering core functional local content.

Value of other local media in delivering core functional local content

<p>Local/regional TV bulletins (both commercial and BBC) were watched regularly by the majority of respondents.</p>	
<p>Pro:</p> <p>The place to digest basic regional information at the beginning and especially end of the day; limited to short bulletins after main news.</p> <p>Good for weather forecasts and has heightened importance at times of crisis (e.g. recent floods).</p>	<p>Con:</p> <p>A strong bias towards regional capitals: truly 'local' coverage is sporadic.</p> <p>In the nations, felt to favour major cities (Cardiff, Glasgow etc.) over the locality.</p> <p>Overall, felt to be the least 'local' of all media discussed</p>
<p><i>"it's not what I'd call purely local, more on a regional level, to get a flavour of what's been happening in the wider area"</i> Female 16-44, Plymouth</p>	

<p>Many of the locations visited had a strong local press presence.</p>	
<p>Pro:</p> <p>A very local feel – the most 'local' medium</p> <p>Many knew where they were published: offices and printing press nearby adds local feel</p> <p>Supplements (jobs; property etc) are valued for browsing; adverts and leaflets valued for local businesses and services</p> <p>Best medium for in depth local sports reports.</p>	<p>Con:</p> <p>Some (especially younger/urban dwellers) simply did not read local press</p> <p>Lacks the accessibility and 'liveness' of radio</p> <p>Seen as a medium for browsing human local content but not for delivering core functional content</p>
<p><i>"I put my feet up at end of day and flick through it in front of the TV"</i> Female 45+ Dundee</p>	

Usage of the **internet** for local content varied according to the respondent's age and working status. For heavier internet users it was felt to have an increasing local role

Pro:

A (younger) minority mentioned online first as a source of local information.

Heavy internet users frequently consulted the local daily/weekly weather outlook.

Local radio and press are increasingly adopting the platform.

A source for listings/cinema purchases, and increasingly a default source for specialised needs e.g. jobs and property

Con:

For some (esp. older) listeners, online has never been considered as a local source.

Felt by many to be updated too infrequently on a local level vs. local radio (especially in areas with few dedicated local websites)

Not as thorough in its coverage of local issues as local press.

"it's good for people wanting to visit here and find a hotel, but not that good for us"

Female 45+, Haverfordwest

"you go there to follow up on a story you'd heard already – you don't find new [local] things"

Male 16-44, Plymouth

Section 6

Assessing attitudes towards locally-made content

Overview: reactions to the regulatory status quo and the challenges facing local commercial broadcasters

- 6.1 Our discussions thus far regarding localness and local radio revealed that the majority of respondents appeared satisfied with the existing amount of local material and locally-made programmes delivered by their local commercial station(s).
- 6.2 In the factual presentation, respondents were taken firstly through the various terms and definitions surrounding local radio regulation, including a definition of 'locally-made' radio output, and secondly through a brief description of the challenges facing many local commercial broadcasters. (see Appendix 1)
- 6.3 Understandably, the vast majority of respondents were unaware of the minutiae of local commercial radio regulation, and of the exact definitions of 'local material' and in particular 'locally-made' programmes.
- 6.4 When apprised of the financial challenges facing local commercial broadcasters, respondents showed genuine surprise at the situation. Their immediate reactions tended to fall into one of two camps:

- a galvanized feeling of empathy with their local station(s):

"it's awful the pressure they're under" Female 16-44, Haverfordwest

"the internet has a lot to answer for – it's killing local businesses"

Male 45+ Dundee

- a more rational, market-driven attitude:

"radio stations should operate like other businesses – those that are good at what they do make profits and those that don't go out of business"

Male 16-44 Lincoln

- 6.5 We then discussed with respondents, in the context of the regulatory status quo and the financial challenges facing local commercial broadcasters, how far they felt that local radio content should be produced and broadcast locally and/or delivered by local personnel, and how important it was that local stations are based in the local area.

Key findings

- 6.6 Whilst listeners were more or less unanimous in their opinions regarding the local content they felt to be indispensable (see Section 5), there was more variation in opinions regarding the issue of locally-made programmes.

6.7 In summary, we found a broad split in opinion across the areas we visited whereby (younger) music-driven listeners felt that the quality of their local station was often reduced by the presence of local presenters, whereas the more community-minded listeners felt that the quality of their local station(s) was actually enhanced by the presence of local presenters.

6.8 **Music-driven listeners**, in particular those in the younger age bracket (<44 years), concentrated initially on music radio and were less concerned that the music presenter should be broadcasting from the local area:

- They tend to flick from station to station (local and national) 'chasing' music they like, so the role of the presenter is minimised.
- Some were already listening to – and satisfied with - syndicated music shows:

"A lot of the time radio is just filled with music and it doesn't matter where it comes from"
Female 16-44 Lincoln

- Many listen regularly to national music radio and feel that the quality of their local presenters is inferior in comparison:

"I listen to the radio mainly for the music. I'll sometimes listen to local radio and it can be a good way of finding out what is on that evening but some of the presenters drive you mad with their ramblings about their own lives"
Male 16-44 Dundee

6.9 **Older listeners, those in community-minded areas, speech radio listeners, and those listening at home during the day** felt much more of a bond with local presenters and it was this familiarity with them, and the knowledge that they are from the local area and are broadcasting from the local area, which made the listening experience valuable and enhanced their sense of local identity:

"The presenter is much more than just a name, you feel like you get to know them and I quite like hearing what they have been up to in the local area especially if you've been to the same place"
Female 45+ Plymouth

"I think a local feel and local accent is important as it sets the station apart – if there wasn't this you may as well be listening to Radio 1, hearing a presenter with your accent talking about your area make you feel at home"

Female 45+ Haverfordwest

6.10 **Specialist local interest groups** such as local sports fans and live music/local festival lovers saw coverage of their respective interests as a key locally-made benefit of their local radio station.

Core functional local content: localness of presenters and proximity of station

6.11 There was however consensus amongst all listener types regarding how far **core, functional local content** should be locally-made in terms of the localness of the presenter and proximity of the local station.

- 6.12 Nearly all listeners felt that the quality and relevance of local traffic/travel reports, and local news and weather bulletins, were **enhanced** by being locally-made and broadcast by local people:

“It’s important that the information comes from someone who actually knows the roads and understands the problem” F 16-44 Liverpool

“If the station is coming from the Lincoln area they find out about school closures quite quickly which is important – we need this information ASAP so we know if the school is open or closed before we leave the house” F 45 + Lincoln

- 6.13 For others it was important that this content came from a local source for reasons of local empathy, or more simply authentic local pronunciation:

“It is not so important that we identify with the station but rather that the station identifies with us – for example they get excited if something happens nearby or if they have difficulties getting home [from the local studio] if there is heavy snow.” F 45+ Haverfordwest

“They had this guy on for a while reading the local news and he couldn’t pronounce the place names properly – you could hear other people in the studio laughing at him” F 16-44 Belfast

- 6.14 A minority of mainly younger listeners felt that it was not important where local news and weather were compiled, as long as they were up to date and accurate.

- 6.15 Some respondents considered the impact that fewer locally-made programmes would have on the local economy, in the sense that local radio personnel, local studios and local advertisers would suffer as a result. This point surfaced again, and amongst a larger number of respondents, later in the sessions when the potential regulatory scenarios were presented to the group (Section 7).

Locally-made programmes in Scotland, Wales and Northern Ireland

- 6.16 In Scotland, Wales and Northern Ireland the issue of locally-made programmes as opposed to national (i.e. Scottish, Welsh or Northern Ireland) output emerged spontaneously on more than one occasion. In some cases listeners felt it was sufficient for the presenter to be from and broadcasting from their own nation:

“It’s a reassuring psychological thing that the station comes from the area and is run by local Irish people – you know they have the same concerns and interests as you to some extent when you hear the accent “ Male 45+ Belfast

- 6.17 For most, however, the primary importance of locally-made programmes was that it gave them reassurance that the level of information they received would be relevant to their local area, rather than to the whole of their nation.

- 6.18 In Haverfordwest and (to a lesser extent) Dundee, listeners felt overlooked by the BBC national services (BBC Radio Wales, BBC Radio Cymru and BBC Radio Scotland) which were not believed to serve their local areas well:

“it’s BBC Wales but it’s all from Cardiff and they rarely talk about our area – we’re the forgotten corner of Wales” Female 16-44 Haverfordwest

- 6.19 In these areas the desire for locally-made programming (as opposed to programming made within their nation) was as strong as, if not stronger than, in the English locations visited:

“I want the local news first, the Scottish news second and the national news third – this is the best order for me on the radio, tell me what is going on here first”

- 6.20 The notion of programming made in their nation as an *alternative* to locally-made programmes did not generally appeal, as listeners feared they would once again be overlooked by a station covering their whole nation.

Alternatives to locally-made programmes

- 6.21 During the factual presentation (see Appendix 1) respondents were made aware of some of the potential alternatives to local material and locally-made programmes, such as national or UK-wide content; content broadcast from another area; local content being made in one area for broadcast in another; and potential benefits from cost saving measures such as the employment of a high profile presenter broadcasting across local areas.
- 6.22 Respondents were encouraged to discuss these alternatives during the discussions around the potential regulatory scenarios.
- 6.23 Whilst respondents accepted that financial pressures meant a relaxation would be inevitable, the alternatives discussed did not receive significant support.
- 6.24 Most argued that the withdrawal of local stations to a syndicated regional or national level would work against the stations themselves, as there would no longer be the point of difference with existing national stations, and therefore they would lose their local audiences.
- 6.25 In Scotland a commercial Scottish station had some support but still could not replace localised content and ‘feel’ of their local commercial station.
- 6.26 The notion of a high profile network presenter as a replacement for localised presenters also received little support as most respondents felt that these were already provided by national stations, and in any case would not be a satisfactory substitute for the localness they would be replacing.

Section 7

Evaluating potential regulatory scenarios

Introducing the scenarios

- 7.1 The final section of the deliberative sessions was dedicated to discussing future regulatory scenarios for local analogue commercial radio.
- 7.2 Respondents were shown five potential scenarios (supplied by Ofcom) – they were split into smaller moderated groups to assess each scenario, and then reconvened to feed back their responses to the whole group.
- 7.3 Rather than asking respondents to isolate a ‘winning’ scenario, we encouraged them to discuss each scenario on its own merits.
- 7.4 The five scenarios were as follows:

Scenario 1	
Locally-made	Local content
None	None

Scenario 2	
Locally-made	Local content
None	News, weather, travel etc. through daytime
Note: by ‘daytime’ we mean 6 a.m. to 7 p.m. weekdays and 8 a.m. to 2 p.m. weekends	

Scenario 3	
Locally-made	Local content
Breakfast	Breakfast, plus news, weather, travel etc through daytime
Note: by ‘daytime’ we mean 6 a.m. to 7 p.m. weekdays and 8 a.m. to 2 p.m. weekends	

Scenario 4	
Locally-made	Local content
4-13 hours depending on size of station	4-13 hours depending on size, plus news, weather, travel etc through daytime
Note: under this scenario, the number of hours will vary depending on the size of the station’s listener population, but the number of hours of locally-made and local content will be equal to or less than the current requirement, but not more	

Scenario 5	
Locally-made	Local content
No change from current requirement	No change from current requirement

The scenarios: initial reactions

- 7.5 We have seen that there were differences in opinion between locations and individual listener types regarding how much local content their local station(s) should provide, and how much of it should be locally-made.
- 7.6 When we presented respondents with a range of potential regulatory scenarios, we found that most were genuinely surprised and concerned at the prospect of a reduction (possibly drastic) in the amount of local material and locally-made programmes their local commercial station may deliver in the future.
- 7.7 Even those listeners who initially claimed to hold less interest or value in local and locally-made content reconsidered their position when faced with the possibility of a drastic reduction in local output.
- 7.8 Respondents also expressed concern from the **citizen** viewpoint at the possibility of greatly reduced local output, citing those who lived in rural areas, the elderly, shift workers and the local economy as elements within the community which would suffer.
- 7.9 Many respondents were confused by what they saw as an underlying paradox running throughout the debate: seeing local content as the 'USP' of local stations (vs. national), they assumed that a reduction in local content would naturally lead to reduced listening and therefore reduced advertising revenues, which would be counter-productive for the local broadcaster.

"[localness] is the only thing they [the broadcasters] have got going for them, why would they want to do away with that?"

*"Are the regulations not a little unnecessary? Surely the radio station would **want** to deliver local information to make sure their listeners are happy and keep listening. If there was nothing local, I don't think people would bother"*

Regulatory scenarios: overview of findings

- 7.10 The majority of respondents opted for a model as close to the status quo as possible, but relaxed this slightly in the knowledge that the current framework may not be financially sustainable for all local commercial broadcasters.
- 7.11 In some cases, the degree to which the local station was felt to be part of the community, or the existence of only one or two local stations in the area, meant that listeners were unwilling to see a reduction in local material and locally-made programmes.
- "I enjoy the local station and would like it to stay exactly the way it is. We didn't have a local station for many years and I'm not prepared to let it change for the worse now. We are a very protective community"* Female 16-44, Haverfordwest
- 7.12 These listeners accepted an element of reduction of local provision only on the basis that it would avert the possibility of losing their local station(s) altogether, which for them would be unacceptable.
- 7.13 In other cases, amongst music driven listeners or in areas where there were a number of available local commercial stations, listeners were comfortable with a

more relaxed regulatory scenario, and focused more on the impact the new regulatory framework would have on the quality of local output.

- 7.14 For all listeners, there was a basic expectation for local material and locally-made programmes which covered their need for core, functional local content at the times they most needed it.
- 7.15 Realising a compromise must be reached, most opted for a model containing **at the very least:**
- Local content (travel, weather, news) throughout the day (as per Scenarios 2-5)
 - Locally-made programmes in the morning, i.e. a breakfast show with key local information delivered by a local team who know and are part of the local area (as per Scenario 3)
- 7.16 Thus across the six locations visited, Scenario 3 was broadly seen as the scenario offering the **minimum** acceptable amount of local material and locally-made programmes.
- 7.17 There were variations in demand for locally-made programmes by interest group (sport, speech etc), and in most cases rural dwellers and those listening at home during the daytime or evening felt they would miss locally-made programmes at other times of the day than just breakfast.
- 7.18 For these listeners Scenario 4 was favoured for its allocation of local material and locally-made programmes which would enable coverage of issues and events beyond breakfast travel and news.

Scenario evaluation summary

- 7.19 The following tables detail responses to each regulatory scenario in terms of:
- Overall response to the scenario.
 - Potential winners and losers from the point of view of consumers, citizens and local commercial broadcasters.

Scenario 1

Locally-made	Local content
None	None

Overall reaction:

This scenario was received with unanimous disapproval and was rejected outright by almost all respondents.

Potential winners:

- BBC local and national stations, in the sense that in the absence of any local output from the local commercial station(s), listeners would be forced to 'migrate' and seek local/regional content from the BBC's local and national services.
- Syndicated commercial broadcasters, as again listeners would migrate away from local stations which had lost their local appeal.
- Local websites
- A minority of music-only radio listeners considered that absence of localness might allow for purely music-based stations, specialising in niche genres

Potential losers:

- The local community – less accessible local information especially during times of crisis when regular updates are essential
- Commuters – they rely upon traffic/travel information
- Local radio employees – job losses
- Local businesses – local radio becomes a less attractive advertising medium
- Local charities – local radio often assists in fundraising and awareness

Key verbatims:

"What would replace the localness??! The station would no longer be close to their local area and the local listeners would no longer feel close to their local station or presenters".

"The local radio station would lose its identity and become the same as all the other big stations"

Scenario 2

Locally-made	Local content
None	News, weather, travel etc. through daytime

Overall reaction:

This scenario satisfied a small minority of music-driven listeners; otherwise it was not felt to deliver enough localness overall. The absence of any locally-made programmes was a concern for most.

Potential winners:

- BBC local and national stations (as per Scenario 1)
- Syndicated commercial broadcasters (as per Scenario 1)
- A minority of listeners – those only interested in the basics – claimed to be comfortable with this scenario
- Local commercial stations – make cost savings

Potential losers:

- Those listeners who value local presenters with knowledge of the area and want to avoid a generic-feeling local radio (especially older/housebound listeners)
- Local presenters and local radio studios – no demand for their services

Key verbatims:

“I would be worried that if the local material was not locally-made, the quality and speed would suffer – the presenter would care less about what they were reading, it would just be words and nothing relevant to their everyday life”

“If less local chat and discussion meant more music that would be great – the only local information I need is news, traffic and travel”.

Scenario 3

Locally-made	Local content
Breakfast	Breakfast, plus news, weather, travel etc through daytime

Overall reaction:

For some, this was close to a good compromise, on condition that the quality of the locally-made Breakfast slot would improve. For others, there was concern that their local station would suffer disproportionately in terms of local content and 'feel' outside of the Breakfast slot.

Potential winners:

- Local commercial stations – stay in business while maintaining a reasonable level of localness
- Some listeners (especially those who criticised the quality of local presenters) felt that less quantity might mean more quality during the Breakfast slot, using savings for better presenters/producers, live acts, more roaming reporting features, and so on.
- Breakfast show listeners – would benefit from the local information delivered in the morning slot

Potential losers:

- Local commercial stations – lose listeners at other times of day, many would only tune in for Breakfast
- Listeners with high local information requirements at other times of day as the detail on events, and discussion of local issues, may suffer
- Listeners with off-peak local content requirements and preferences; in particular the more community-minded, the elderly, those at home during the day or listening during the evening, those in more remote locations, and shift workers
- Listeners who value consistency/continuity - the station may will change in 'feel' depending on time of day
- Local sport enthusiasts – miss out on a Saturday afternoon
- Non 9-5 workers who may miss the Breakfast slot but still require local content

Key verbatims:

“Having the breakfast show presented by a local DJ with a focus on talking about the local area is a small step in the right direction”

“This option is quite good because it delivers the local information at the most important time when most people are listening and trying to plan their day”.

Scenario 4

Locally-made	Local content
4-13 hours depending on size of station	4-13 hours depending on size, plus news, weather, travel etc through daytime

Overall reaction:

This scenario was felt to be the best compromise for the majority of respondents, as it appeared to promise a minimum level of local material and locally-made programmes, deployed across the day. Concern was however expressed from both a consumer and a citizen viewpoint that in smaller, rural localities the local station would be permitted to provide no more than 4 hours per day of locally-made programming whereas it is in these very localities that local content is relied upon more.

Potential winners:

- Local commercial stations – make some savings without substantial listener loss and possible increased flexibility
- Most listeners felt they would receive enough localness from their local station if the upper end of the scale were applied
- Some listeners also believed that this reduction in required local and locally-made content would mean more quality
- Local businesses – more surviving stations to advertise services

Potential losers:

- As per Scenario 3, Listeners with higher local information or content requirements; in particular the more community-minded, the elderly, those at home during the day or listening during the evening, those in more remote locations, and shift workers
- Listeners in rural/low population areas – if the regulation were relaxed according to size of station, they feared that smaller stations would be allocated a lower requirement for locally-made hours, but that this would not be adequate

Key verbatims:

“This scenario seems to offer more flexibility and allow the radio station to cater for their audience with some freedom.”

“Would the reduced amount of local material required mean an increase in quality in the remaining local hours – if so this approach would be a real winner for me!”

Scenario 5

Locally-made	Local content
No change from current requirement	No change from current requirement

Overall reaction:

This scenario was felt to be largely hypothetical since in the factual presentation respondents were made aware that the current regulatory framework may not be sustainable.

Key verbatims:

"I don't think this is a very good option as only the profitable would survive and these are not necessarily the best stations in the eyes of the local people".

"This is going to be a big no-no for the local stations. If everything stays the same we might lose local radio completely"

7.20 Variations in responses to each of the scenarios by listener type has been summarised below. Please note this is based on reactions during the group discussions around each of the scenarios.

Figure 7 Responses to scenarios by listener type – qualitative discussions

	Scenario 1	Scenario 2	Scenario 3	Scenario 4	Scenario 5
Young	LOW	MEDIUM	HIGH	HIGH	MEDIUM
Old	LOW	LOW	LOW	MEDIUM	HIGH
Town	LOW	LOW	MEDIUM	HIGH	MEDIUM
Country	LOW	LOW	LOW	MEDIUM	HIGH
Reasonable choice of local stations	LOW	MEDIUM	HIGH	HIGH	MEDIUM
Limited choice of local stations	LOW	LOW	MEDIUM	MEDIUM	HIGH
Established Resident	LOW	MEDIUM	MEDIUM	HIGH	MEDIUM
Newcomer	LOW	LOW	MEDIUM	MEDIUM	HIGH

7.21 This table demonstrates that although scenario 4 is favoured by a number of the listener groups there is some interest in scenario 2 amongst younger listeners, those with a wide choice of local stations and established residents. Scenario 3 also has

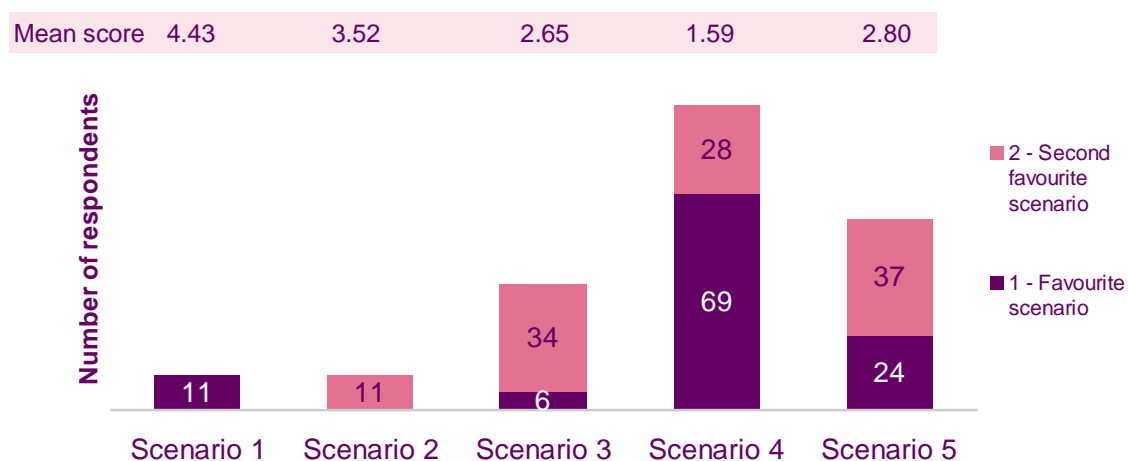
support across a number of listener groups apart from older listeners and those in rural locations.

- 7.22 Discussions throughout the workshops highlighted the fact that listener experience and expectations of local radio vary widely across the UK based on a number of variables including geography, social and media-related variables and life-stage.
- 7.23 These differences were also apparent when choosing the most favoured scenario as some groups, such as those listening predominantly for music, felt they would not be adversely affected by a reduction in local material or locally-made programmes and others would be impacted by such a reduction due to their reliance on the local commercial station to provide both core functional content and human engaged local content.
- 7.24 Overall however, Scenario 4 was ranked as the most favoured choice with Scenario 3 in second place.

Scenario evaluation – Individual questionnaire responses

7.25 In the post-workshop questionnaires respondents were asked to rank the scenarios in order of preference (1= favourite scenario, 5 = least favourite scenario) – it is important to highlight here that responses to the questionnaires were made on an individual basis (whereas the above findings were based on qualitative group discussions). Figure 8 illustrates the results of this ranking exercise by showing the number of participants ranking each scenario as their first or second choice as well as a mean score (based on all scores from the favourite to least favourite scenario). It is important to note that these figures are based on a sample size of 110 respondents and should be treated with some caution, although the data presented is consistent with the qualitative findings presented above.

Figure 8 Scenario preferences based on individual questionnaire responses – Favourite & second favourite scenarios

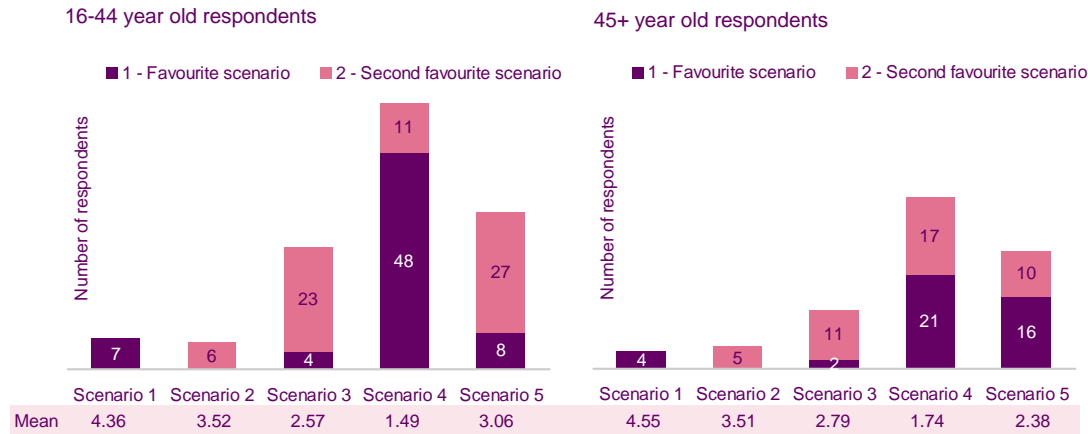


Base: 110 respondents

7.26 The majority of participants favoured Scenario 4 with a mean score of 1.59. Over 50 respondents ranked Scenario 5 as their first or second choice scenario even though they were aware this was hypothetical. 11 respondents chose Scenario 1 as their favourite or second favourite – but with 82 ranking this as their least favourite choice this scenario achieved an overall mean score of 4.43.

7.27 Although the findings of this ranking exercise by age group can only be used as indicative (due to sample size) the order in which the scenarios were ranked by 16-44 year olds and those aged 45 or over were the same – the only exception being that the over 45s ranked Scenario 5 in second place and Scenario 3 in third place.

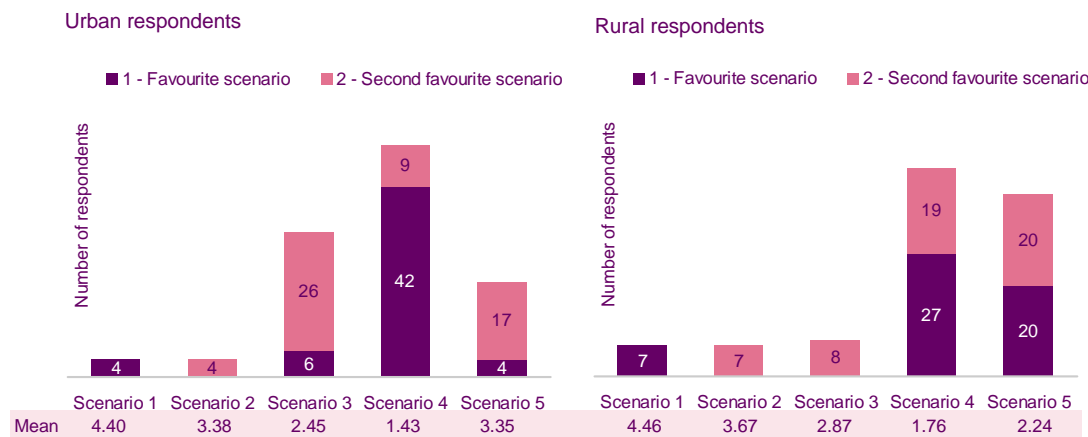
Figure 9 Scenario preferences based on individual questionnaire responses – by age



Base: 67 16-44 year old respondents, 43 45+ year old respondents

7.28 Similarly, the findings of the ranking exercise across urban and rural residents can be used indicatively. These figures show that urban respondents rank scenario 3 as their second favourite scenario (after scenario 4) and the difference in the mean scores between scenarios 3 and 5 is wider among this group than any of the other sub-groups. Among rural dwellers scenario 5 is the second favourite scenario with only 8 respondents mentioning scenario 3 as their first or second choice.

Figure 10 Scenario preferences based on individual questionnaire responses – urban vs rural



Base: 56 urban respondents, 54 rural respondents