

Annex 4: Area by Area Analysis

Note: This document contains 7 errata (see footnotes 8, 31, 34, 41, 44, 53, 80) and 6 addenda (see footnotes 7, 9, 32, 42, 51, 81) that have been added since the report was submitted.

- A1.1 This annex opens with an overview of the areas of interest. This is followed by a detailed assessment of each area in terms of availability of local and regional news cross platform, consumption and impact.
- A1.2 In preparing our assessment of consumption and impact we have gathered data across the different geographic territories affected by the acquisition drawing on RAJAR and quantitative consumer research. We note a number of limitations in the scope and detail of the data available to us, including:
- RAJAR¹ methodology does not allow us to analyse the reach of typical news bulletins. Using a diary-method respondents are instructed to fill in a quarter-hour if they have listened to a station for at least 5 minutes within that quarter-hour. It is therefore not possible to analyse listening behaviour for any period less than 15 minutes. Most news bulletins are much shorter. In addition the data does not provide programme level analysis.
 - In considering the population living in the overlap between GMG Radio and Global Radio stations in the areas of interest, RAJAR guidelines² do not allow us to analyse the listening figures within partial TSAs, because the results are not statistically robust³. We have therefore identified the relevant TSA of the GMG Radio or Global Radio station that is the closest proxy to the overlap population in each geographical area of interest.
 - To inform our assessment of impact we have drawn on existing Ofcom research which provides some high level information of the role of radio compared to other media. However, these were designed as UK level surveys which results in some limitations in sub-sample analysis. In addition, much of this existing research can only be reported at the level of Government Office Regions⁴ which do not match the areas of interest.
 - BARB⁵ regions do not match the areas of interest.
 - We have not commissioned cross-platform share of references⁶ (SoR) data at the source or wholesale provider levels for local/regional news by geographical area. This is very challenging to research. Our recommended method for attempting to deliver this aim would be bespoke telephone interview by postcode area to ensure the sample represents the geographical area of interest. Off-the-shelf

¹ RAJAR (Radio Joint Audience Research) is the industry body responsible for providing the official measurement of UK radio audiences.

² http://www.rajar.co.uk/docs/about/publication_code.pdf

³ Total Survey Area: The area within which a station's audience is measured. This is defined by the station using postcode districts as building blocks.

⁴ Until end April 2011, Government Office Regions (GOR) have been the primary classification for the presentation of regional statistics used by the Office of National Statistics. GORs are built up of complete counties/unitary authorities to reflect administrative boundaries. Following the Comprehensive Spending Review ONS will no longer update these regions, and they have subsequently been renamed as Regions.

⁵ BARB (Broadcasters' Audience Research Board) is the organisation responsible for providing the official measurement of UK television audiences.

⁶ Developed by Ofcom through bespoke quantitative research as a cross-media measure of news consumption that looks at all sources of news used across the four main platforms (TV, radio, newspaper, online).

omnibus surveys (either face to face or phone) would not deliver this and the timeframe of 40 days is too short to allow for bespoke research.

Overview

A1.3 GMG Radio local stations are available in nine regions across the UK using three distinct brands:

Fig 1: GMG local radio stations by geographical area

England						Scotland	Wales	
North East	Yorkshire	North West	West Midlands	East Midlands	London	Central Scotland	North Wales	South Wales
Real Radio	Real Radio	Real Radio	Smooth Radio	Smooth Radio	Smooth Radio	Real Radio	Real Radio	Real Radio
Smooth Radio		Smooth Radio				Smooth Radio		
		106.1 Real XS				96.3 Real XS		

A1.4 In each of these areas there is at least one local Global Radio radio station overlapping with all or part of the GMG TSA.

A1.5 We note that Smooth Radio stations in England do not have a requirement to provide local news which therefore excludes the Midlands and London from our review in relation to local and regional news provision.

A1.6 For analytical purposes, we have defined our primary geographical area of interest as any location where a GMG Radio station and Global Radio station overlap, where the merger leads to a reduction (by one) in the plurality of media owners available for people living in those areas.

A1.7 We have also given consideration to non-overlapping areas for GMG Radio stations:

Fig 2: Primary and secondary areas of interest

Wales			Scotland			England			
Real Wales (N) TSA	Capital S Wales TSA	Real Wales (S) TSA	96.3 Real XS TSA	Smooth Glasgow TSA	Real Radio Scot TSA	Capital NE TSA	Real Radio Yorks TSA	Real Radio NW TSA	106.1 Real XS TSA
Primary	Primary	Secondary	Primary	Primary	Primary	Primary	Primary	Secondary	Primary

A1.8 For each area of interest we have considered availability, consumption and impact metrics in addition to contextual factors.

Note: The listening data presented for each area below is based on the RAJAR Q2 2012 survey of all adults 15+ using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio. We have only considered the local services by each media owner. Figures may also include a small amount of listening to other local stations provided by a media owner but targeting neighbouring TSAs. As such, the share figures provided may not total 100% due to some listening to other stations available in the area including smaller commercial stations or stations targeting neighbouring areas⁷.

⁷ **Addendum:** this paragraph has been added since the report was submitted.

Wales

A1.9 Within Wales there are two broad regions affected by the acquisition of GMG Radio by Global Radio: North and South Wales. The maps below show the relevant stations and how their TSAs overlap.

Fig 3: Map of North Wales showing GMG Radio and Global Radio station TSAs

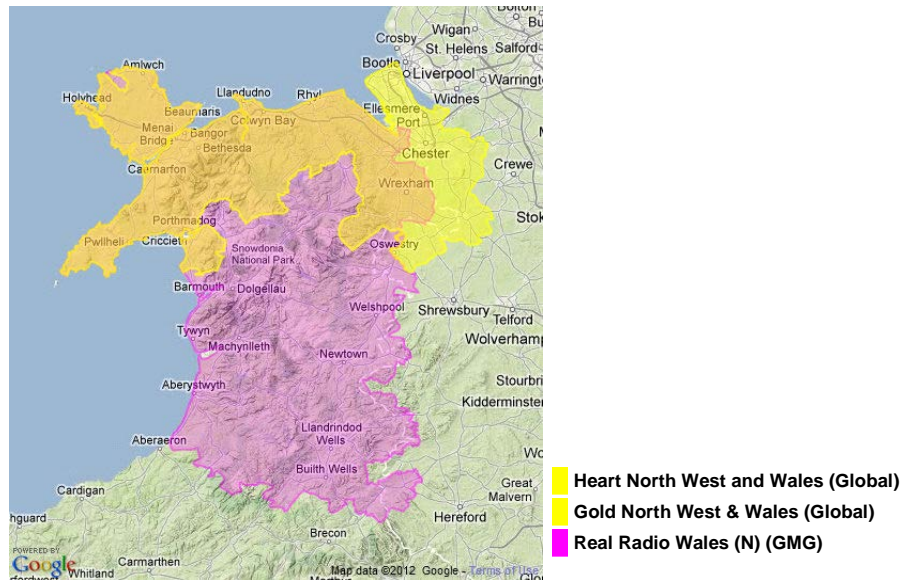
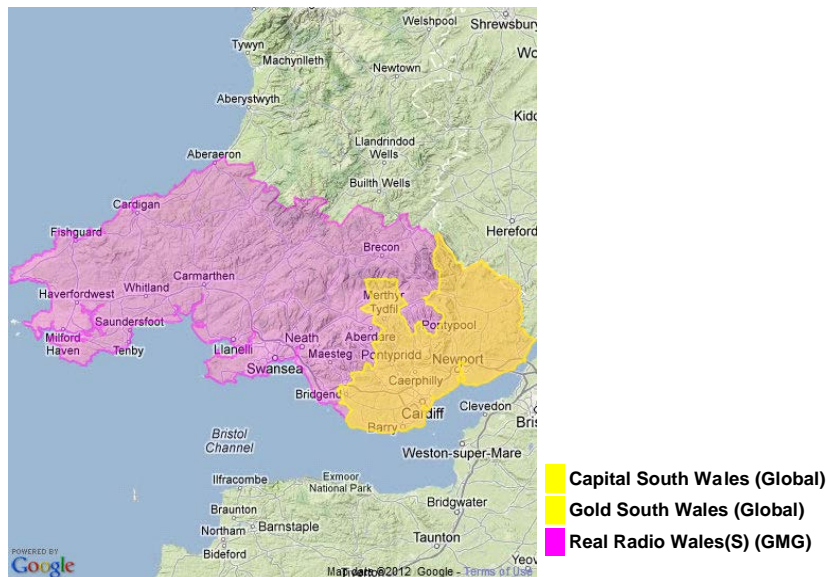


Fig 4: Map of South Wales showing GMG Radio and Global Radio station TSAs



Source: Radio Advertising Bureau

Area of interest 1: Real Radio Wales (North) TSA

Geography

- A1.10 The map of North Wales above illustrates the area of interest and the Global Radio and GMG Radio stations being considered.
- A1.11 The primary area of interest is the overlap between the GMG Radio and Global Radio stations. It has an estimated population of 514,000 adults⁸.
- A1.12 We have selected the Real Radio Wales (N) TSA as being the closest representation of the overlap population in this instance as 75% of adults within this TSA are situated in the area covered by both Global Radio and GMG Radio local radio stations:

Fig 5: GMG Radio/Global Radio TSA population overlap

	TSA population	Overlap population between Global and GMG stations	% of TSA population in overlap area
Real Radio Wales (N) TSA (GMG)	689,000	514,000	75%
Heart NW & Wales TSA (Global)	999,000	514,000	51%
Gold NW & Wales TSA (Global)	999,000	514,000	51%

Source: RAJAR Q2 2012, 12 month weight, adults 15+

Availability and consumption

- A1.13 For each area, where possible, we have considered the availability of local media providers across radio, print, television and online and estimated the scale of their coverage within those areas. It should be noted that not all local media sources are available across the area of interest. For example a particular newspaper title may be distributed within a smaller geographical area than the TSA.
- A1.14 We have also considered the size of the audience which consumes each of the local media available. We have drawn on standard industry measurement systems: BARB for television, RAJAR for radio and JICREG for print.

1. Radio

- A1.15 The table below lists all of the local radio stations available within the Real Radio Wales (N) TSA, including those not measured by RAJAR such as community services. In total, we have identified 19 local radio stations available to some degree across this area. However, we have excluded some of these services from our

⁸ Source: RAJAR Q2 2012, 12 month weighting, adults 15+.

availability analysis on the basis that they are either small-scale, do not target the Real Radio Wales (N) TSA population or do not provide local/regional/nations news.

A1.16 The data is based on the RAJAR Q2 2012 survey of all adults 15+ in the Real Radio Wales (N) TSA using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio. We have only considered the local services by each media owner. Figures may also include a small amount of listening to other local stations provided by a media owner but targeting neighbouring TSAs.

A1.17 In the post-merger scenario we conclude there are five sources providing local news on radio in this area (Real Radio, Gold, Heart, BBC Radio Wales, BBC Radio Cymru), with two owners (Global Radio and the BBC)

A1.18 The table also shows radio consumption in the Real Radio Wales (N) TSA. Figures for smaller stations such as Radio Ceredigion are not included due to their TSAs only covering a relatively low proportion of the Real Radio Wales (N) TSA.

A1.19 The consumption figures show that Global Radio's Heart NW & Wales is the most listened to station in this TSA with 138,000 adults tuning in each week, a fifth of the available population (20%). Excluding the national commercial and BBC network stations, Heart takes almost a third (28%) of the share of the listening to local stations (using the base of any local commercial station or any BBC local/regional station).

Fig 6: Local radio availability and consumption in the Real Radio Wales (N) TSA

Media owner (post-merger)	Station	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)	% coverage of station in RRW(N) TSA	% of station's TSA within RRW TSA	Explanation for omission
Global	Real Radio Wales (N)	8%	58	11%	100%	100%	-
BBC	Radio Wales	11%	72	14%	100%	27%	-
BBC	Radio Cymru	11%	74	21%	100%	27%	-
Global	Gold NW/Wales	3%	18	4%	76%	52%	-
Global	Heart NW/Wales	20%	138	28%	76%	52%	-
Bauer	Magic 1548	-	-	-	31%	12%	Targets NW England not N Wales
Bauer	Radio City 96.7	-	-	-	31%	12%	Targets NW England not N Wales
Global	Smooth Radio NW	-	-	-	19%	3%	No local news
Global	Real Radio NW	-	-	-	19%	3%	Targets NW England not N Wales
Independent	Dee 106.3	-	-	-	11%	40%	Targets NW England not N Wales
Town and Country	Radio Ceredigion	-	-	-	5%	44%	Small-scale
Independent	Free Radio FM	-	-	-	1%	2%	Targets Midlands not N Wales
Independent	Radio Hafren	-	-	-	-	-	Targets mid-Wales and Borders
Independent	The Severn	-	-	-	-	-	Targets Shrops and Worcs not N Wales
Community	Tudno FM	-	-	-	-	-	Small-scale
Community	Point FM	-	-	-	-	-	Small-scale
Community	Glan Clwyd AM ⁹	-	-	-	-	-	Small-scale
Community	Mon FM ⁹	-	-	-	-	-	Small-scale
Community	Harlech FM ⁹	-	-	-	-	-	Small-scale

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, Real Radio Wales (N)TSA

Notes: Table ranked by % coverage within the Real Radio Wales (N)TSA

Weekly reach(000s) is the number of people aged 15+ who listen to a radio station within at least one quarter-hour period over the course of a week

Weekly reach % is the weekly reach expressed as a proportion of the population within the base TSA

Share of local radio is the percentage of local radio listening hours that a station accounts for within the TSA

⁹-Denotes community station not yet on air

A1.20 The table below shows the listening figures for the key media owners in the TSA. Post-merger, Global Radio has a 49% share of listening to any local radio in the Real Radio Wales (N) TSA. The combined weekly reach of Global Radio local stations post-merger in this area is 203,000, 30% of the adult population.

⁹ **Addendum:** this footnote has been added to the bottom of figures 6, 19, 26, 32, 38, since the report was submitted.

Fig 7: Weekly reach and share by media owner (pre and post merger) in the Real Radio Wales (N) TSA

	Media owner	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)
Pre-merger	Global	21%	146	33%
	GMG	13%	87	17%
Post-merger	Global	30%	203	49%
	BBC	20%	140	39%

Source: RAJAR Q2 2012, 12 month weight, Real Radio Wales (N)TSA

2. Print

A1.21 The tables below show the availability of local print media in the Real Radio Wales (N) TSA. In total, we have identified 22 local print media titles available to some degree across this area. There are 6 free titles and 16 paid for titles and 3 daily and 18 weekly titles available across the TSA.

A1.22 However, we have excluded some titles from our analysis on the basis that they are not targeting the Real Radio Wales (N) TSA population or are an England-based title.

A1.23 On this basis we conclude there are 16 retail providers of local news in print media in this area (detailed in the 'Title' column e.g. Wrexham Leader) with four wholesale providers (NWN Media, Trinity Mirror Plc, Tindle Newspapers Ltd, Midland News Association Ltd).

A1.24 JICREG data as of 1 April 2012 shows that NWN Media has the largest number of titles (9) within this area. It also has almost two-thirds of the share of circulation (65.3%). The title with the highest reach within the area is the Wrexham Leader, a weekly free sheet owned by NWN Media. It is read by 6.7% of the population (or 46,104 people) within the TSA.

Fig 8: Local print title availability and consumption in the Real Radio Wales (N) TSA

Media Owner	Title	Daily ?	Paid?	Reach	Reach as % of TSA	% of reach in TSA	Explanation for omission
NWN Media	Wrexham Leader	N	N	46,104	6.7	100%	-
NWN Media	North Wales Chronicle Series	N	N	42,413	6.2	100%	-
NWN Media	Rhyl Prestatyn Abergele Journal	N	N	38,973	5.7	100%	-
Trinity Mirror Plc	NORTH WALES WEEKLY NEWS	N	Y	38,092	5.5	100%	-
NWN Media	North Wales Pioneer	N	N	34,433	5.0	100%	-
NWN Media	Flintshire Standard	N	N	31,317	4.6	100%	-
Trinity Mirror Plc	Mail Series (Bangor & Holyhead)	N	Y	26,345	3.8	100%	-
NWN Media	Denbighshire Free Press	N	Y	17,737	2.6	100%	-
NWN Media	The Leader - Wrexham & Chester	Y	Y	39,019	5.7	100%	-
Trinity Mirror Plc	DAILY POST - WALES	Y	Y	106,821	15.5	98%	-
NWN Media	The County Times & Express - Welshpool	N	Y	38,797	5.6	96%	-
Tindle Newspapers Ltd	Cambrian News	N	Y	47,780	7.0	80%	-
Trinity Mirror Plc	CHESTER CHRONICLE	N	Y	28,889	4.2	44%	English title
Tindle Newspapers Ltd	Brecon & Radnor Express	N	Y	10,134	1.5	41%	-
Midland News Association Ltd	SOUTH SHROPSHIRE/MID WALES	N	Y	4,694	0.7	34%	-
NWN Media	Oswestry & Border Counties Advertiser	N	Y	6,931	1.0	29%	English title
Midland News Association Ltd	Oswestry & Border Chronicle	N	Y	3,899	0.6	23%	English title
Trinity Mirror Plc	WALES - WESTERN MAIL	Y	Y	8,439	1.2	9%	-
Trinity Mirror Plc	WALES ON SUNDAY	N	Y	8,716	1.3	8%	-
Trinity Mirror Plc	Chronicle Xtra - Chester	N	N	3,510	0.5	5%	English title
Northcliffe Media Ltd	CARMARTHEN JOURNAL	N	Y	362	0.1	1%	Targets S Wales
Northcliffe Media Ltd	WESTERN DAILY PRESS	Y	Y	42	0.0	0%	English title

Source: Ofcom analysis; JICREG, April 2012, Real Radio Wales (N)TSA

Notes: Table ranked by % reach within the Real Radio Wales (N)TSA

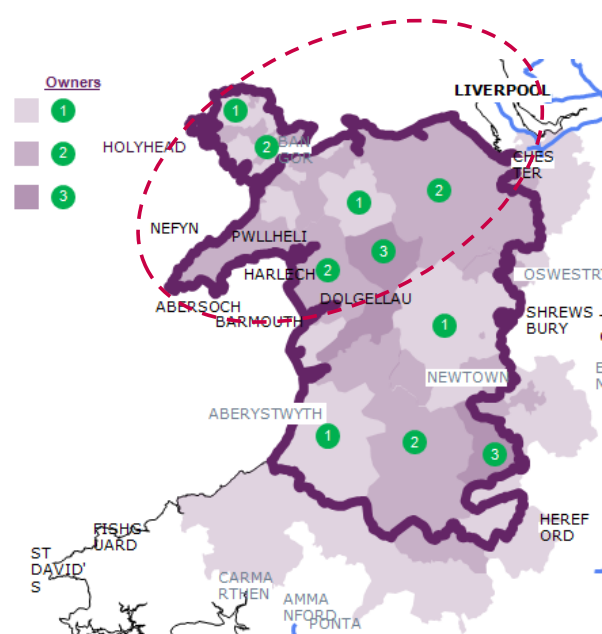
Fig 9: Share of circulation and number of titles by media owner in the Real Radio Wales (N) TSA

	Share of circulation	Number of titles
NWN Media	65.3%	9
Trinity Mirror Plc	25.0%	7
Tindle Newspapers Ltd	7.8%	2
Midland News Association Ltd	1.9%	2
Northcliffe Media Ltd	0.0%	2

Source: JICREG

A1.25 The map below shows how the availability of print owners differs across the areas of interest (the circled area indicates the overlap area between Real Radio Wales (N) and the Global stations Heart and Gold). The numbers shown indicate how many owners provide titles in the different areas. For example, in the North East of the region there are two regional print title owners compared to the North of the region which has only one print title owner available.

Fig 10: Number of press-title owner available across the Real Radio Wales (N) TSA



Source: JICREG

3. Television

A1.26 There are three sources of regional television news each available across the whole of the Real Radio Wales (N) TSA: BBC One, ITV1 Wales and S4C.

A1.27 However, BBC Cymru Wales provides S4C with its news (albeit not its current affairs) content. For this reason, taking a cautious approach, we have not placed weight on the existence of S4C in this analysis.

A1.28 BARB data shows that the average weekly reach to regional television news in Wales by BBC One and ITV1 Wales combined is 60%¹⁰.

4. Online¹¹

A1.29 There is a range of websites published by the BBC, print media owners and local radio companies: there are two BBC news websites serving North Wales - North West and North East – in addition to websites provided by BBC Radio Wales and BBC Radio Cymru. The Newspaper Society indicates that 18 local print titles also provide a website; and most commercial or community radio stations also provide a website (but these tend to provide only schedule information rather than bespoke regional news content).

A1.30 According to analysis undertaken by Birmingham University¹² there are 15 additional independent providers of online news, regional and local news and current affairs content. It is uncertain what level of news, regional and local news these sites carry. Our understanding is that they are focused on tightly defined local areas and we have seen no evidence to suggest that they have the capacity to influence the democratic debate in Wales.

The following sections relate to cross platform consumption and impact, drawing on a range of existing Ofcom surveys.

5. Cross-platform consumption

A1.31 According to Ofcom research (2012), when respondents in Wales as a whole were asked about the platforms they use for local media, the results showed that local radio commanded a substantial 'share of references' (22%), ranking second to TV (42 %).

A1.32 The research also indicates that 3% of respondents in Wales use only local radio on a weekly basis. However, the same research shows that 50% of respondents use local radio on a weekly basis while on average, respondents use 2.7 local media platforms (from among TV, print, online, radio)¹³. Local radio usage indicated is broadly in line with RAJAR estimates as seen in chart 1 which indicates that 48% of people in the Real Radio Wales (N) TSA listen to local radio each week.

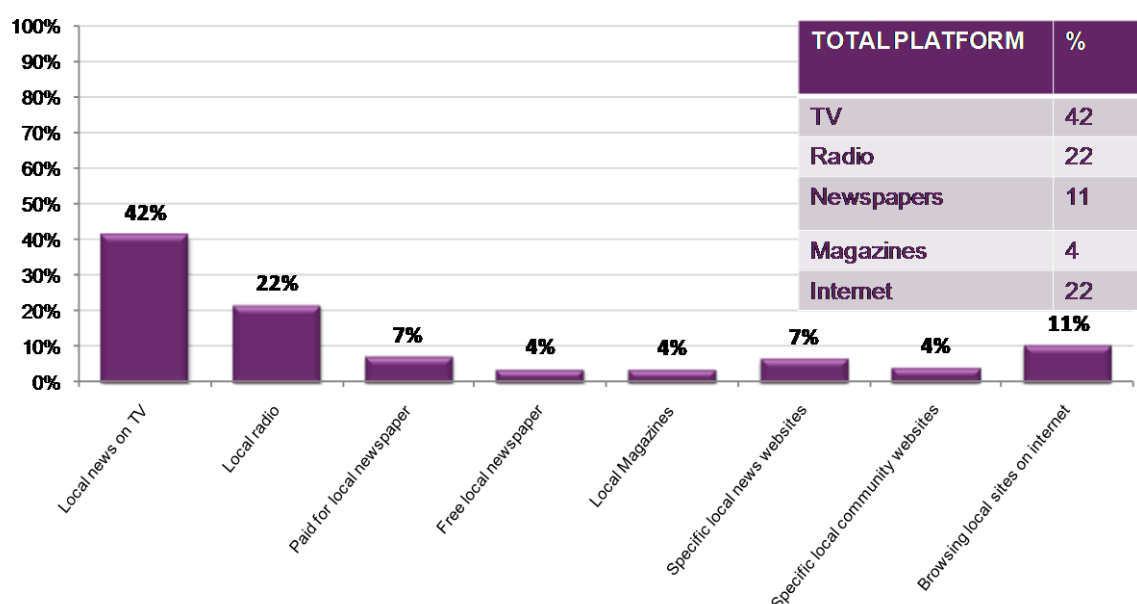
¹⁰ Based on total minutes of viewing of 'News: Regional News' genre. Reach based on 3mins consecutive, full weeks only based on 'News: Regional News' genre. 2011

¹¹ We have also considered the proportion of people who have access to the internet at home as reported in Ofcom's communications market report (2012) in terms of the UK as a whole and in each devolved nation.

¹² A database of hyperlocal websites has been established by Openly Local and analysed by Birmingham City University in May 2012.

¹³ Source: Ofcom research undertaken by Ipsos Mori (May, 2012).

Fig 11: Share of References for local media platforms - Wales



Source: Ofcom Local Media Survey 2012¹⁴
Base: All in Wales, 182

Impact

- A1.33 According to Ofcom research (2011), when respondents in Wales overall were asked what was their main source of news to find out “What’s going on in my nation”, radio was cited by 8% of respondents (alongside press) while 76% cited television¹⁵.
- A1.34 In Wales, 71% of people indicate that TV is their main source for news about their local area followed by print (9%) and then radio (8%).
- A1.35 Research undertaken by Ofcom (2012¹⁶) provides an overview of the perceived personal importance of each local media platform among users of each platform at a UK-level. The results showed that 59% of viewers scored local news on TV 7 or higher out of 10 in terms of its importance as a local media source. Whereas 44% of listeners scored local radio as important, 43% of readers did so for paid for local print and 29% for free local print. 38% scored ‘internet in general’ highly on importance, 28% for local news websites, 37% for local community sites, and 27% for local magazines.

Contextual factors

- A1.36 Wales is a distinct democratic unit. Decisions taken by the National Assembly for Wales and the Welsh Government have a significant bearing on a wide range of public policy issues. In assessing the plurality of persons with control over media enterprises, we have given weight to the need for Welsh audiences to have access to a wide range of sources of nations news and current affairs, from a plurality of media owners.

¹⁴ <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

¹⁵ Source: Ofcom’s media tracker (2011).

¹⁶ Source: Ofcom research undertaken by Ipsos Mori (2012).

A1.37 We note that in this context, the overlap area between Real Radio Wales (N) and Global Radio stations covers 17% of the Welsh population.

Area of interest 2: Capital Radio South Wales TSA

Geography

- A1.38 The map of South Wales above illustrates the area of interest and the Global Radio and GMG Radio stations being considered.
- A1.39 The primary area of interest is the overlap between the GMG Radio and Global Radio stations and has an estimated population of 1,002,000 adults¹⁷.
- A1.40 We have selected the Capital South Wales TSA as being the closest representation of the overlap population in this instance as 100% of adults within this TSA are situated in the area covered by both Global Radio and GMG Radio stations:

Fig 12: GMG Radio/Global Radio TSA population overlap

	TSA population	Overlap population	% of TSA pop'n in overlap
Real Radio Wales (S) TSA	1,845,000	1,002,000	54%
Capital South Wales TSA	1,002,000	1,002,000	100%
Gold South Wales TSA	1,002,000	1,002,000	100%

Source: RAJAR Q2 2012, 12 month weight, adults 15+

- A1.41 We have also considered the Real Radio Wales (S) TSA as a secondary area of interest as although the number of media providers in the non-overlap area will not change, almost half of the people in this area will be affected by the change in ownership. Analysis for this area is provided in the next section.

Availability and consumption

1. Radio

- A1.42 The table below lists all the local radio stations available within the Capital South Wales TSA, including those not measured by RAJAR such as community services. In total, we have identified 12 local radio stations available to some degree across this area. However, we have excluded some of these services from our availability analysis on the basis that they are either small-scale, do not target the Capital South Wales TSA population or do not provide local/regional/nations news.
- A1.43 On this basis in the post-merger scenario we conclude there are six sources providing local news on radio in this area (Real Radio, Gold, Capital, Nation Radio, BBC Radio Wales, BBC Radio Cymru), with three owners (Global, Town and Country and the BBC).
- A1.44 The data is based on the RAJAR Q2 2012 survey of all adults 15+ in the Capital South Wales TSA using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio. We have only considered the local services by each media owner. Figures may also include a small amount of

¹⁷ Source: RAJAR Q2 2012, 12 month weighting, adults 15+

listening to other local stations provided by a media owner but targeting neighbouring TSAs.

A1.45 The table also shows radio consumption in the Capital South Wales TSA. Real Radio Wales (S) is the most listened to station in this TSA with 227,000 adults tuning in each week, almost a quarter (23%) of the available population. Excluding the national commercial and BBC network stations, Real has 26% of the share of the listening to local stations (using the base of any local commercial station or any BBC local/regional station).

Fig 13: Local radio availability and consumption in the Capital South Wales TSA

Media owner (post-merger)	Station	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)	% coverage in the Capital S Wales TSA	% of station's TSA within Capital S	Explanation for omission
Global	Capital South Wales	22%	224	19%	100%	100%	-
Global	Gold South Wales	5%	54	9%	100%	100%	-
Global	Real Radio Wales (S)	23%	227	26%	100%	54%	-
BBC	Radio Wales	20%	199	24%	100%	40%	-
BBC	Radio Cymru	2%	19	1%	100%	40%	-
Town and Country	Nation Radio	8%	80	7%	87%	61%	-
Bauer	Kiss West	16%	161	10%	84%	35%	No local news
Town and Country	106.3 Bridge FM	-	-	-	5%	44%	Small-scale
Community	GTfM	-	-	-	-	-	Small-scale
Community	Pontypridd Radio	-	-	-	-	-	Small-scale
Community	Cardiff BRfm	-	-	-	-	-	Small-scale
Community	BRO Radio	-	-	-	-	-	Small-scale

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, Capital South Wales TSA

Notes: Table ranked by % coverage within the Capital South Wales TSA

Weekly reach(000s) is the number of people aged 15+ who listen to a radio station within at least one quarter-hour period over the course of a week

Weekly reach % is the weekly reach expressed as a proportion of the population within the base TSA

Share of local radio is the percentage of local radio listening hours that a station accounts for within the TSA

A1.46 The table below shows the listening figures for the key media owners in the TSA. Post-merger, Global Radio has a 56% share of listening to any local radio in the Capital South Wales TSA and the combined weekly reach to Global Radio stations is 406,000, 41% of the adult population.

Fig 14: Weekly reach and share by media owner (pre and post merger) in the Capital South Wales TSA

	Media owner	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)
Pre-merger	Global	27%	266	28%
	GMG	23%	230	28%
Post-merger	Global	41%	406	56%
	BBC	21%	214	26%

Source: RAJAR Q2 2012, 12 month weight, Capital South Wales TSA

2. Print

A1.47 The tables below show the availability of local print media in the Capital South Wales TSA. In total, we have identified 21 local print media titles available to some degree across this area. There are 4 free titles and 17 paid for titles, and 4 daily and 17 weekly titles available across the TSA.

A1.48 However, we have excluded some titles from our analysis on the basis that they are not targeting the Capital South Wales TSA population or are an England-based title.

A1.49 On this basis we conclude there are 15 retail providers of local news in print media in this area (detailed in the 'Title' column e.g. Merthyr express) with three wholesale providers (Newsquest MediaGroup, Trinity Mirror Plc, Tindle Newspapers Ltd).

A1.50 Newsquest, Trinity Mirror and Tindle Newspapers each have 7 titles available in this area but Newsquest accounts for a slightly larger share of circulation – 38.1% compared to Trinity Mirror's 33.8%. Tindle Newspapers accounts for the remaining share (28.0%). Tindle Newspapers' free paper the Glamorgan Gem is the most read paper in the area, reaching 5.2% of the population (38,920 people) on a weekly basis.

Fig 15: Local print title availability and consumption in the Capital South Wales TSA

Media Owner	Title	Daily?	Paid?	Reach	Reach as % of TSA	% of reach in TSA	Explanation for omission
Newsquest Media Group	Campaign Caerphilly Ystrad Mynach & Bargoed	N	N	40,536	4.1	100%	-
Newsquest Media Group	Penarth Times	N	Y	12,365	1.2	100%	-
Newsquest Media Group	Weekly Argus - Newport Cwmbran & Risca	N	N	28,156	2.8	100%	-
Newsquest Media Group	Barry & District News	N	Y	14,370	1.4	100%	-
Newsquest Media Group	Free Press of Monmouthshire Group	N	Y	16,825	1.7	99%	-
Newsquest Media Group	South Wales Argus - Newport	Y	Y	54,472	5.5	97%	-
Trinity Mirror Plc	SOUTH WALES ECHO	Y	Y	103,480	10.4	95%	-
Tindle Newspapers Ltd	Glamorgan Gem	N	N	52,136	5.2	94%	-
Tindle Newspapers Ltd	Monmouthshire Beacon	N	Y	13,123	1.3	93%	-
Trinity Mirror Plc	MERTHYR EXPRESS	N	Y	31,131	3.1	93%	-
Tindle Newspapers Ltd	Abergavenny Chronicle	N	Y	16,075	1.6	89%	-
Trinity Mirror Plc	PONTYPRIDD OBSERVER GROUP	N	Y	26,274	2.6	59%	-
Trinity Mirror Plc	WALES ON SUNDAY	N	Y	48,892	4.9	47%	-
Trinity Mirror Plc	GLAMORGAN GAZETTE (BRIDGEND)	N	Y	17,354	1.7	38%	-
Trinity Mirror Plc	WALES - WESTERN MAIL	Y	Y	35,674	3.6	38%	-
Tindle Newspapers Ltd	Forest & Wye Valley Review	N	N	20,164	2.0	32%	English title
Trinity Mirror Plc	CYNON VALLEY LEADER (ABERDARE)	N	Y	4,960	0.5	27%	-
Newsquest Media Group	Hereford Times	N	Y	2,526	0.3	3%	English title
Tindle Newspapers Ltd	Ross Gazette	N	Y	191	0.0	2%	English title
Northcliffe Media Ltd	WESTERN DAILY PRESS	Y	Y	1,093	0.1	1%	English title
Tindle Newspapers Ltd	Brecon & Radnor Express	N	Y	285	0.0	1%	Targets mid Wales
Tindle Newspapers Ltd	THE FORESTER - CINDERFORD	N	Y	254	0.0	1%	English title

Source: Ofcom analysis; JICREG, April 2012, Capital South Wales TSA

Notes: Table ranked by % reach within the Capital South Wales TSA

Fig 16: Share of circulation and number of titles by media owner in the Capital South Wales TSA

	Share of circulation	Number of titles
Newsquest Media Group	38.1%	7
Trinity Mirror Plc	33.8%	7
Tindle Newspapers Ltd	28.0%	7
Northcliffe Media Ltd	0.1%	1

Source: JICREG

3. Television

- A1.51 There are three sources of regional television news each available across the whole of the Capital South Wales TSA: BBC One, ITV1 Wales and S4C. (See note above about S4C sourcing news output from the BBC.)
- A1.52 BARB data shows that the average weekly reach to regional television news in Wales by BBC One and ITV1 Wales combined is 60%¹⁸.

4. Online

- A1.53 There is a range of websites published by the BBC, print media owners and local radio companies: there are two BBC news websites serving South Wales - South West and South East – in addition to websites provided by BBC Radio Wales and BBC Radio Cymru. The Newspaper Society indicates that 13 local print titles also provide a website. Most commercial or community radio stations also provide a website but these tend to provide only schedule information rather than bespoke regional news content.
- A1.54 According to analysis undertaken by Birmingham University¹⁹ there are additional independent providers of online nations, regional and local news and current affairs content. It is uncertain what level of nations, regional and local news these sites carry. Our understanding is that they are focused on tightly defined local areas and we have seen no evidence to suggest that they have the capacity to influence the democratic debate in Wales. This analysis identified 15 hyperlocal websites available across Wales.

The following sections relate to cross platform consumption and impact drawing on a range of existing Ofcom surveys.

5. Cross-platform consumption

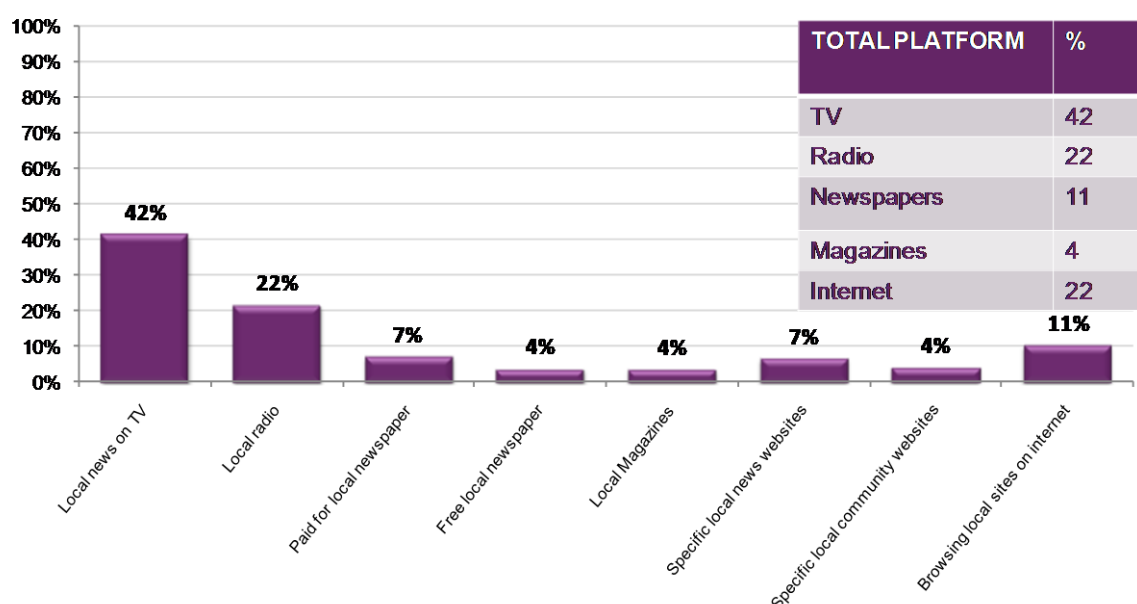
- A1.55 According to Ofcom research (2012), when respondents in Wales as a whole were asked about the platforms they use for local media, the results showed that local radio commanded a substantial 'share of references' (22%), ranking second to TV (42 %).
- A1.56 The research also indicates that 3% of respondents in Wales use only local radio on a weekly basis. However, the same research shows that 50% of respondents use local radio on a weekly basis while on average, respondents use 2.7 local media platforms (from among TV, print, online, radio)²⁰. Local radio usage indicated is broadly in line with RAJAR estimates as seen in chart 1 which indicates that 48% of people in the Real Radio Wales (N) TSA listen to local radio each week.

¹⁸ Based on total minutes of viewing of 'News: Regional News' genre. Reach based on 3mins consecutive, full weeks only based on 'News: Regional News' genre. 2011

¹⁹ A database of hyperlocal websites has been established by Openly Local and analysed by Birmingham City University in May 2012.

²⁰ Source: Ofcom research undertaken by Ipsos Mori (May, 2012).

Fig 17: Share of References for local media platforms - Wales



Source: Ofcom Local Media Survey 2012²¹
Base: All in Wales, 182

Impact

A1.57 According to Ofcom research (2011), when respondents in Wales overall were asked what was their main source of news to find out “What’s going on in my nation”, radio was cited by 8% of respondents (alongside press) while 76% cited television²².

A1.58 In Wales, 71% of people indicate that TV is their main source for news about their local area followed by print (9%) and then radio (8%).

A1.59 Research undertaken by Ofcom (2012²³) provides an overview of the perceived personal importance of each local media platform among users of each platform. The results showed that 59% of viewers scored local news on TV 7 or higher out of 10 in terms of its importance as a local media source. Whereas 44% of listeners scored local radio as important, 43% of readers did so for paid for local print and 29% for free local print. 38% scored ‘internet in general’ highly on importance, 28% for local news websites, 37% for local community sites, and 27% for local magazines.

Contextual factors

A1.60 Wales is a distinct democratic unit. Decisions taken by the National Assembly for Wales and the Welsh Government have a significant bearing on a wide range of public policy issues. In assessing the plurality of persons with control over media enterprises, we have given weight to the need for Welsh audiences to have access to a wide range of sources of nations news and current affairs, from a plurality of media owners.

²¹ <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

²² Source: Ofcom’s media tracker (2011).

²³ Source: Ofcom research undertaken by Ipsos Mori (2012).

Area of interest 3: Real Radio Wales (S) TSA

Geography

A1.61 The map of South Wales above illustrates the areas of interest and the Global Radio and GMG Radio stations being considered.

A1.62 This section considers the secondary area of interest, the Real Radio Wales (S) TSA which includes the people in the non-overlapping area which was served by a GMG Radio station and has an estimated population of 1.8m adults. Although the number of media providers in the non-overlap area will not change there will be an effect due to the change in ownership. This area also encompasses the overlap area which we considered separately in the previous section.

Fig 18: GMG Radio/Global Radio TSA population overlap

	TSA population	Overlap population	% of TSA pop'n in overlap
Real Radio Wales (S) TSA	1,845,000	1,002,000	54%
Capital South Wales TSA	1,002,000	1,002,000	100%
Gold South Wales TSA	1,002,000	1,002,000	100%

Source: RAJAR Q2 2012, 12 month weight, adults 15+

Availability and consumption

1. Radio

A1.63 The table below lists all of the local radio stations available within the Real Radio Wales (S) TSA, including those not measured by RAJAR such as community services. In total, we have identified 21 local radio stations available to some degree across this area. However, we have excluded some of these services from our availability analysis on the basis that they are either small-scale; serve a niche community, do not target the Real Radio Wales (S) TSA population or do not provide local/regional/nations news.

A1.64 On this basis in the post-merger scenario we conclude there are eight sources for local news on radio in this area (Real Radio, Gold, Capital, Nation Radio, Swansea Sound, 96.4 FM The Wave, BBC Radio Wales, BBC Radio Cymru), with four owners (Global Radio, UTV, Town and Country and the BBC).

A1.65 The data is based on the RAJAR Q2 2012 survey of all adults 15+ in the Real Radio Wales (S) TSA using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio. We have only considered the local services by each media owner. Figures may also include a small amount of listening to other local stations provided by a media owner but targeting neighbouring TSAs.

A1.66 The table also shows radio consumption in the Real Radio Wales (S) TSA. Real Radio Wales (S) is the most listened to station in this TSA with 405,000 adults tuning in each week, over a fifth (22%) of the available population. Excluding the national commercial and BBC network stations, Real has 24% of the share of the listening to

local stations (using the base of any local commercial station or any BBC local/regional station). This includes listening to any local station recorded by the RAJAR respondent.

Fig 19: Local radio availability and consumption in the Real Radio Wales (S) TSA

Media owner (post-merger)	Station	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)	% coverage in RRSW TSA	% of station's TSA within RRSW TSA	Explanation for omission
Global	Real Radio Wales (S)	22%	405	24%	100%	100%	-
BBC	Radio Wales	21%	393	25%	100%	73%	-
BBC	Radio Cymru	3%	63	4%	100%	73%	-
Town and Country	Nation Radio	7%	129	7%	77%	100%	-
Global	Capital South Wales	12%	224	10%	54%	100%	-
Global	Gold South Wales	3%	54	5%	54%	100%	-
Bauer	Kiss West	9%	167	5%	48%	37%	No local news
Town and Country	Nation 80s	-	-	-	25%	100%	No local news
UTV	Swansea Sound	-	-	-	25%	100%	-
UTV	96.4 FM The Wave	-	-	-	25%	100%	-
Town and Country	Radio Carmarthenshire	-	-	-	7%	100%	Small-scale
Town and Country	106.3 Bridge FM	-	-	-	7%	100%	Small-scale
Town and Country	Radio Pembrokeshire	-	-	-	5%	100%	Small-scale
Town and Country	Radio Ceredigion	-	-	-	3%	56%	Small-scale
Independent	Sunshine Radio	-	-	-	-	-	Small-scale
Independent	Radio Hafren	-	-	-	-	-	Small-scale
Community	GTFM Pontypridd	-	-	-	-	-	Small-scale
Community	Radio Cardiff	-	-	-	-	-	Small-scale
Community	BRm Radio Tircoed	-	-	-	-	-	Small-scale
Community	BRO Radio	-	-	-	-	-	Small-scale
Community	Radio Beca-	-	-	-	-	-	Small-scale

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, Real Radio Wales (S) TSA

Notes: Table ranked by % coverage within the Real Radio Wales (S) TSA

Weekly reach(000s) is the number of people aged 15+ who listen to a radio station within at least one quarter-hour period over the course of a week

Weekly reach % is the weekly reach expressed as a proportion of the population within the base TSA

Share of local radio is the percentage of local radio listening hours that a station accounts for within the TSA

-Denotes community station not yet on air

A1.67 The table below shows the listening figures for the key media owners in the TSA. Post-merger, Global Radio has a 40% share of listening to any local radio in the Real Radio Wales (S) TSA and the combined weekly reach to Global Radio stations is 596,000, 32% of the adult population.

Fig 20: Weekly reach and share by media owner (pre and post merger) in the Real Radio Wales (S) TSA

	Media owner	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)
Pre-merger	Global	14%	266	15%
	GMG	23%	420	25%
Post-merger	Global	32%	596	40%
	BBC	23%	43	29%

Source: RAJAR Q2 2012, 12 month weight, Real Radio Wales (S) TSA

2. Print

A1.68 The tables below show the availability of local print media in the Real Radio Wales (S) TSA. In total, we have identified 33 local print media titles available to some

degree across this area. There are 4 free titles and 29 paid for titles, and 5 daily and 28 weekly titles available across the TSA.

- A1.69 However, we have excluded some titles from our analysis on the basis that they are not targeting the Real Radio Wales (S) TSA population or are an England-based title.
- A1.70 On this basis we conclude there are 26 retail providers of local news in print media in this area (detailed in the 'Title' column e.g. Barry & District News) with four wholesale providers (Newsquest MediaGroup, Northcliffe Media, Trinity Mirror Plc, Tindle Newspapers Ltd).
- A1.71 Despite having a far greater number of titles available within the TSA, Trinity Mirror only has a marginally higher share of circulation than Newsquest. Trinity has 11 titles compared to Newsquest's 4, but a share of circulation of 32.2% compared to Newsquest's 31.1%. The other two groups with titles in this area also have significant shares of circulation; Northcliffe Media has a 16.9% share with 10 titles and Tindle Newspapers has a 19.8% share with 8 titles. The most read title in the area is Trinity's South Wales Echo, a paid for title with 103,480 readers each day (10.4% of the population of the TSA).

Fig 21: Local print title availability and consumption in the Real Radio Wales (S) TSA

Media Owner	Title	Daily?	Paid?	Reach	Reach as % of RRWS TSA	% of reach in RRWS TSA	Explanation for omission
Newsquest Media Group	Barry & District News	N	Y	14,375	0.8	100%	-
Newsquest Media Group	Campaign Caerphilly Ystrad Mynach & Bargoed	N	Y	40,536	2.3	100%	-
Newsquest Media Group	Cardigan & Tivy-side Advertiser	N	Y	16,719	0.9	100%	-
Newsquest Media Group	Milford Mercury	N	Y	9,369	0.5	100%	-
Newsquest Media Group	Penarth Times	N	Y	12,365	0.7	100%	-
Newsquest Media Group	South Wales Guardian	N	Y	15,149	0.8	100%	-
Newsquest Media Group	Weekly Argus - Newport Cwmbran & Risca	N	N	28,156	1.6	100%	-
Newsquest Media Group	Western Telegraph	N	Y	50,060	2.8	100%	-
Northcliffe Media Ltd	LLANELLI STAR SERIES	N	N	41,954	2.3	100%	-
Northcliffe Media Ltd	SOUTH WALES EVENING POST	Y	Y	125,999	7.0	100%	-
Tindle Newspapers Ltd	County Echo	N	Y	5,235	0.3	100%	-
Tindle Newspapers Ltd	Glamorgan Gern	N	Y	55,451	3.1	100%	-
Tindle Newspapers Ltd	Tenby Observer Group	N	Y	19,571	1.1	100%	-
Trinity Mirror Plc	CYNON VALLEY LEADER (ABERDARE)	N	Y	18,504	1.0	100%	-
Trinity Mirror Plc	GLAMORGAN GAZETTE (BRIDGEND)	N	Y	45,305	2.5	100%	-
Trinity Mirror Plc	GWENT GAZETTE	N	Y	16,108	0.9	100%	-
Trinity Mirror Plc	MERTHYR EXPRESS	N	Y	33,522	1.9	100%	-
Trinity Mirror Plc	PONTYPRIDD OBSERVER GROUP	N	Y	44,892	2.5	100%	-
Trinity Mirror Plc	SOUTH WALES ECHO	Y	N	108,639	6.0	100%	-
Newsquest Media Group	South Wales Argus - Newport	Y	Y	56,121	3.1	100%	-
Newsquest Media Group	Free Press of Monmouthshire Group	N	Y	16,896	0.9	100%	-
Northcliffe Media Ltd	CARMARTHEN JOURNAL	N	Y	52,477	2.9	94%	-
Tindle Newspapers Ltd	Monmouthshire Beacon	N	Y	13,123	0.7	93%	-
Tindle Newspapers Ltd	Abergavenny Chronicle	N	Y	16,464	0.9	91%	-
Trinity Mirror Plc	WALES ON SUNDAY	N	Y	92,629	5.1	90%	-
Trinity Mirror Plc	WALES - WESTERN MAIL	Y	Y	81,830	4.5	87%	-
Tindle Newspapers Ltd	Forest & Wye Valley Review	N	Y	20,164	1.1	32%	English title
Tindle Newspapers Ltd	Cambrian News	N	Y	4,736	0.3	8%	Small scale within the TSA
Newsquest Media Group	Hereford Times	N	N	2,706	0.2	3%	English title
Tindle Newspapers Ltd	Brecon & Radnor Express	N	Y	692	0.0	3%	Targets mid Wales
Tindle Newspapers Ltd	Ross Gazette	N	Y	191	0.0	2%	English title
Northcliffe Media Ltd	WESTERN DAILY PRESS	Y	Y	1,093	0.1	1%	English title
Tindle Newspapers Ltd	THE FORESTER - CINDERFORD	N	Y	254	0.0	1%	English title

Source: Ofcom analysis; JICREG, April 2012, Real Radio Wales (S) TSA

Notes: Table ranked by % reach within the Real Radio Wales (S) TSA

Fig 22: Share of circulation and number of titles by media owner in the Real Radio Wales (S) TSA

	Share of circulation	Number of titles
Trinity Mirror Plc	32.2%	11
Newsquest Media Group	31.1%	4
Northcliffe Media Ltd	16.9%	10
Tindle Newspapers Ltd	19.8%	8

Source: JICREG

3. Television

A1.72 There are three sources of regional television news each available across the whole of the Real Radio Wales (S) TSA: BBC One, ITV1 Wales and S4C. (See note about S4C.)

A1.73 BARB data shows that the average weekly reach to regional television news in Wales by BBC One and ITV1 Wales combined is 60%²⁴.

4. Online

A1.74 There is a range of websites published by the BBC, print media owners and local radio companies. There are two BBC news websites serving North Wales - South West and South East – in addition to websites provided by BBC Radio Wales and BBC Radio Cymru. The Newspaper Society indicates that 20 local print titles also provide a website. Most commercial or community radio stations also provide a website but these tend to provide only schedule information rather than bespoke regional news content.

A1.75 According to analysis undertaken by Birmingham University²⁵ there are additional independent providers of online nations, regional and local news and current affairs content. It is uncertain what level of nations, regional and local news these sites carry. Our understanding is that they are focused on tightly defined local areas and we have seen no evidence to suggest that they have the capacity to influence the democratic debate in Wales. This analysis identified 15 hyperlocal websites available across Wales.

The following sections relate to cross platform consumption and impact draw on a range of existing Ofcom surveys.

5. Cross-platform consumption

A1.76 According to Ofcom research (2012), when respondents in Wales as a whole were asked about the platforms they use for local media, the results showed that local radio commanded a substantial 'share of references' (22%), ranking second to TV (42 %).

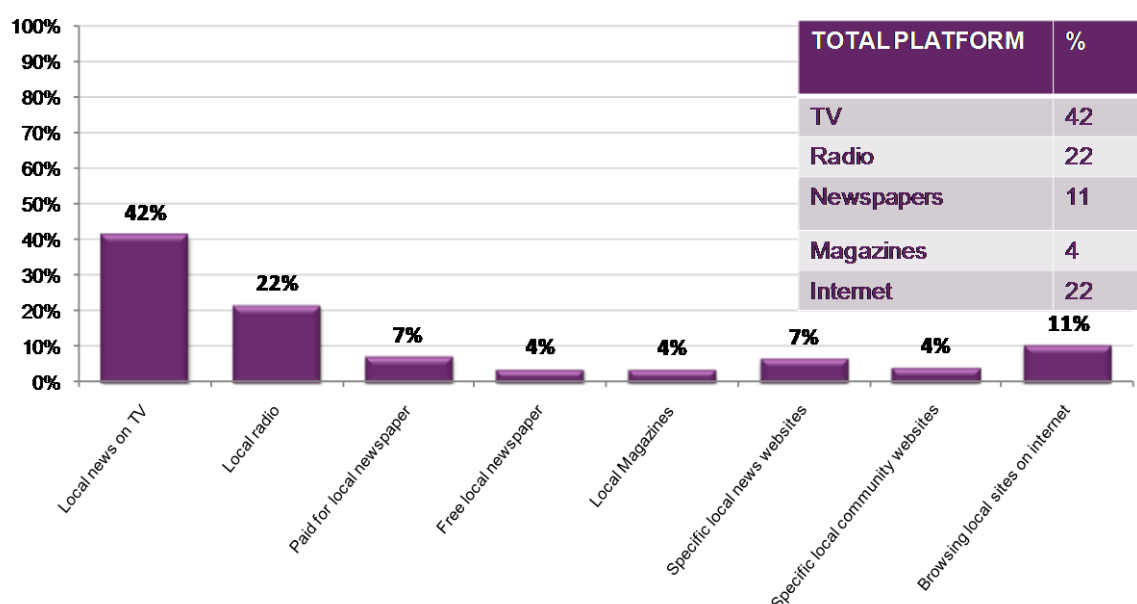
A1.77 The research also indicates that 3% of respondents in Wales use only local radio on a weekly basis. However, the same research shows that 50% of respondents use local radio on a weekly basis while on average, respondents use 2.7 local media platforms (from among TV, print, online, radio)²⁶.

²⁴ Based on total minutes of viewing of 'News: Regional News' genre. Reach based on 3mins consecutive, full weeks only based on 'News: Regional News' genre. 2011

²⁵ A database of hyperlocal websites has been established by Openly Local and analysed by Birmingham City University in May 2012.

²⁶ Source: Ofcom research undertaken by Ipsos Mori (May, 2012).

Fig 23: Share of References for local media platforms - Wales



Source: Ofcom Local Media Survey 2012²⁷

Base: All in Wales, 182

Impact

A1.78 According to Ofcom research (2011), when respondents in Wales overall were asked what was their main source of news to find out “What’s going on in my nation”, radio was cited by 8% of respondents (alongside press) while 76% cited television²⁸.

A1.79 In Wales, 71% of people indicate that TV is their main source for news about their local area followed by print (9%) and then radio (8%).

A1.80 Research undertaken by Ofcom (2012²⁹) provides an overview of the perceived personal importance of each local media platform among users of each platform. The results showed that 59% of viewers scored local news on TV 7 or higher out of 10 in terms of its importance as a local media source. Whereas 44% of listeners scored local radio as important, 43% of readers did so for paid for local print and 29% for free local print. 38% scored ‘internet in general’ highly on importance, 28% for local news websites, 37% for local community sites, and 27% for local magazines.

Contextual factors

A1.81 Wales is a distinct democratic unit. Decisions taken by the National Assembly for Wales and the Welsh Government have a significant bearing on a wide range of public policy issues. In assessing the plurality of persons with control over media enterprises, we have given weight to the need for Welsh audiences to have access to a wide range of sources of nations news and current affairs, from a plurality of media owners.

²⁷ <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

²⁸ Source: Ofcom’s media tracker (2011).

²⁹ Source: Ofcom research undertaken by Ipsos Mori (2012).

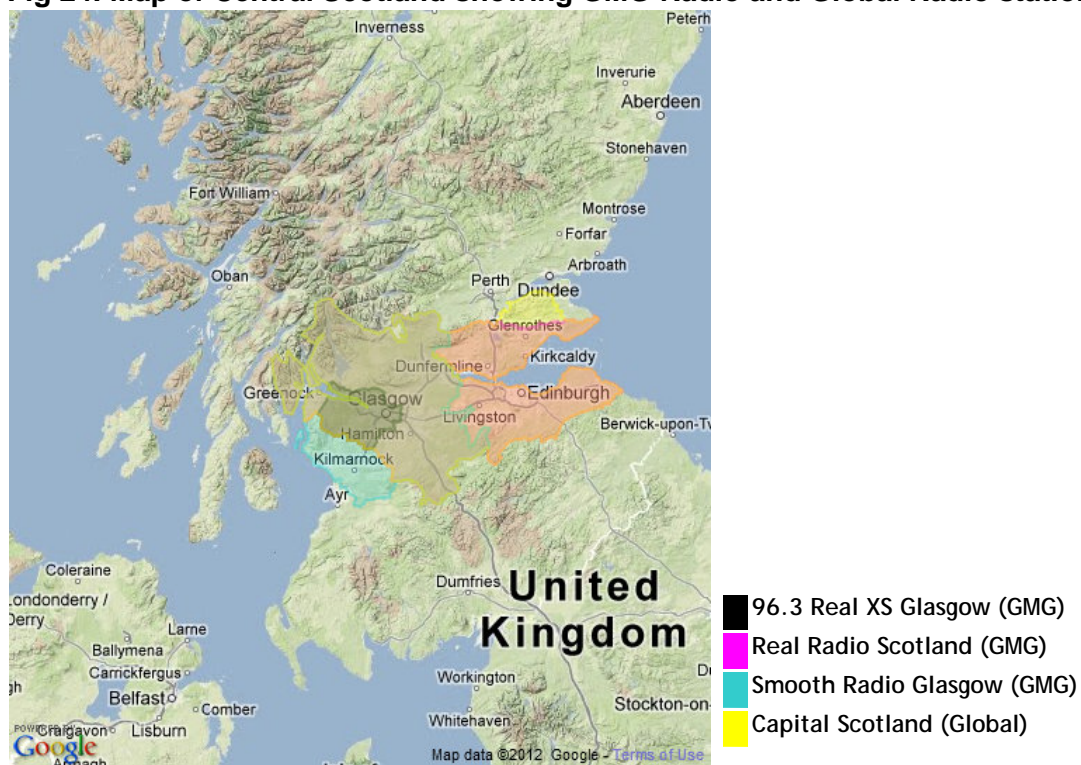
Scotland

A1.82 The map below shows the relevant stations that we are considering in our analysis of the areas of interest in Scotland and how their TSAs overlap.

A1.83 There are three GMG Radio stations available across Central Scotland - 96.3 Real XS, Smooth Radio Glasgow and Real Radio Scotland – and one Global Radio station (Capital Radio Scotland) which overlaps to varying degrees with each GMG Radio station.

A1.84 In order to understand the impact of the acquisition we have defined each GMG TSA as a separate primary area of interest.

Fig 24: Map of Central Scotland showing GMG Radio and Global Radio station TSAs



Source: Radio Advertising Bureau

Area of interest 4: 96.3 Real XS (Glasgow)TSA

Geography

A1.85 The map of Central Scotland above illustrates the Global Radio and GMG Radio stations being considered.

A1.86 The first primary area of interest is the overlap between the GMG Radio and Global Radio stations within the 96.3 Real XS TSA. It has an estimated population of 821,000 adults³⁰.

Fig 25: GMG/Global TSA population overlap

	TSA population	Overlap population between Global and GMG stations	% of TSA population in overlap area
96.3 Real Radio TSA (GMG)	821,000	821,000	100%
Capital Scotland TSA (Global)	2,755,000	821,000	30%

Source: RAJAR Q2 2012, 12 month weight, adults 15+

Availability and consumption

1. Radio

A1.87 The table below lists all of the local radio stations available within the 96.3 Real XS TSA, including those not measured by RAJAR such as community services. In total, we have identified 17 local radio stations available to some degree across this area. However, we have excluded some of these services from our availability analysis on the basis that they are either small-scale; serve a niche community, do not target the 96.3 Real XS TSA population or do not provide local/regional/nations news.

A1.88 On this basis in the post-merger scenario we conclude there are eight sources for local news on radio in this area (96.3 Real XS, Real Radio, Smooth Radio Glasgow, Capital Scotland, Clyde 1, Clyde 2, BBC Radio Scotland and BBC Radio nan Gàidheal). There are three owners (Global Radio, Bauer and the BBC).

A1.89 The data is based on the RAJAR Q2 2012 survey of all adults 15+ in the 96.3 Real XS TSA using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio. We have only considered the local services provided by each media owner. Figures may also include a small amount of listening to other local stations provided by a media owner but targeting neighbouring TSAs.

A1.90 The table also shows radio consumption in the 96.3 Real XS TSA. The figures show that Bauer's Clyde 1 is the most listened to station in this TSA with 262,000 adults tuning in each week, almost a third of the available population (32%). Excluding the

³⁰ Source: RAJAR Q2 2012, 12 month weighting, adults 15+

national commercial and BBC network stations, Clyde 1 takes almost a third (29%) of the share of the listening to local stations (using the base of any local commercial station or any BBC local/regional station). This includes listening to any local station recorded by the RAJAR respondent.

Fig 26: Local radio availability and consumption in the 96.3 Real XS TSA³¹

Media Owner (post-merger)	Station	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)	% of 96.3 Real XS TSA	% of TSA within 96.3 Real XS TSA	Explanation for omission
Global	96.3 Real XS	8%	62	4%	100%	100%	-
Global	Smooth Radio Glasgow	16%	128	14%	100%	43%	-
Global	Real Radio Scotland	17%	137	16%	100%	30%	-
Global	Capital Scotland	16%	133	12%	100%	30%	-
Bauer	Clyde 1	32%	262	29%	100%	44%	-
Bauer	Clyde 2	11%	93	10%	100%	44%	-
BBC	Radio Scotland	21%	169	14%	100%	19%	-
BBC	nan Gàidheal	-	-	-	100%	19%	-
Community	Insight radio	-	-	-	-	-	Small-scale
Community	Sunny Govan Radio	-	-	-	-	-	Small-scale
Community	Awaz FM	-	-	-	-	-	Small-scale
Community	Revival FM	-	-	-	-	-	Small-scale
Community	Dunoon Community Radio	-	-	-	-	-	Small-scale
Community	Celtic Music Radio	-	-	-	-	-	Small-scale
Community	Pulse Community Radio	-	-	-	-	-	Small-scale
Community	Camglen Radio	-	-	-	-	-	Small-scale
Community	Celtic Music Radio FM	-	-	-	-	-	Small-scale

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, 96.3 Real XS TSA

Notes: Table ranked by % coverage within the 96.3 Real XS TSA

Weekly reach(000s) is the number of people aged 15+ who listen to a radio station within at least one quarter-hour period over the course of a week

Weekly reach % is the weekly reach expressed as a proportion of the population within the base TSA

Share of local radio is the percentage of local radio listening hours that a station accounts for within the TSA

-Denotes community station not yet on air

A1.91 The table below shows the listening figures for the key media owners in the TSA. Post-merger, Global Radio has a 46% share of listening to any local radio in the 96.3 Real XS TSA. Bauer has a 39% share and the combined weekly reach to Global Radio stations in the 96.3 Real XS TSA is 332,000, 40% of the adult population. The combined reach to Bauer local stations is 302,000 adults (37%).

Fig 27: Weekly reach and share by media owner (pre and post merger) in the 96.3 Real XS TSA

Media owner	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)
Global	16%	133	12%
GMG	32%	260	34%
Global	40%	332	46%
Bauer	37%	302	39%
BBC	21%	170	14%

Source: RAJAR Q2 2012, 12 month weight, 96.3 Real XS TSA

2. Print

A1.92 The tables below show the availability of local print media in the 96.3 Real XS TSA. In total, we have identified 26 local print media titles available to some degree across this area. There are 3 free titles and 23 paid for and 9 daily and 17 weekly titles available across the TSA.

³¹ **Erratum:** the spelling of the station names of nan Gàidheal and/or Sunny Govan have been corrected on Figures 26, 32, 38, since the report was submitted.

A1.93 However, we have excluded some titles from our analysis on the basis that they are not targeting the 96.3 Real XS TSA population.

A1.94 We note that News International's Scottish Sun is also available in the area and is included in our count of news sources available.

A1.95 On this basis we conclude there are 17 retail providers of local news in print media in this area (detailed in the 'Title' column e.g. Clydebank Post) with five wholesale providers (Romanes Media Group, Trinity Mirror Plc, Johnston Press, Newsquest Media Group, News International).

A1.96 Trinity Mirror's titles account for over half (52.8%) of the share of circulation in this TSA. Romanes Media Group has the highest number of titles available in the TSA (7), although these titles account for only 9.7% of total circulation. There are four groups with either one or two titles available; in total these titles count for less than 1% of total circulation. The Daily Record, owned by Trinity Mirror, is the most read title in this area, reaching 29.7% of the population (243,098 people).

Fig 28: Local print title availability and consumption in the 96.3 Real XS TSA

Media Owner	Title	Daily?	Paid?	Reach	Reach as % of TSA	% of reach in TSA	Explanation for omission
Romanes Media Group (formerly Dunfermline Press)	Clydebank Post	N	Y	25605	3	100%	-
Romanes Media Group (formerly Dunfermline Press)	Paisley & Renfrewshire Gazette Series	N	Y	18685	2	100%	-
Trinity Mirror Plc	PAISLEY DAILY EXPRESS	Y	Y	19425	2	100%	-
Romanes Media Group (formerly Dunfermline Press)	Paisley People	N	N	6314	1	100%	-
Johnston Press	Milngavie & Bearsden Herald	N	Y	14521	2	94%	-
Trinity Mirror Plc	The Glaswegian	N	N	61316	7	86%	-
Johnston Press	Glasgow South & Eastwood Extra	N	N	32836	4	76%	-
Newsquest Media Group	GLASGOW - EVENING TIMES	Y	Y	100687	12	69%	-
Trinity Mirror Plc	RUTHERGLEN REFORMER	N	Y	6652	1	59%	-
Romanes Media Group (formerly Dunfermline Press)	Dumbarton Vale of Leven Reporter	N	Y	5361	1	54%	-
Trinity Mirror Plc	LENNOX HERALD	N	Y	13788	2	51%	-
Newsquest Media Group	THE HERALD - SCOTLAND	Y	Y	62939	8	42%	-
Newsquest Media Group	SUNDAY HERALD - SCOTLAND	N	Y	43498	5	31%	-
Trinity Mirror Plc	DAILY RECORD - SCOTLAND	Y	Y	243098	30	29%	-
Romanes Media Group (formerly Dunfermline Press)	Greenock Telegraph	Y	Y	6019	1	18%	-
Oban Times Ltd	Arran Banner	N	Y	1199	0	17%	Not targeting Glasgow
Johnston Press	SCOTLAND ON SUNDAY	N	Y	15233	2	9%	-
Romanes Media Group (formerly Dunfermline Press)	Helensburgh Advertiser	N	Y	1345	0	9%	Not targeting Glasgow
Johnston Press	Kirkintilloch Herald	N	Y	1406	0	5%	Not targeting Glasgow
E & R Inglis	Dunoon Observer & Argyllshire Standard	N	Y	507	0	4%	Not targeting Glasgow
Johnston Press	THE SCOTSMAN	Y	Y	4456	1	3%	-
Orkney Media Group Ltd	The Orcadian - Orkney	N	Y	239	0	1%	Not targeting Glasgow
D C Thomson & Co Ltd	COURIER & ADVERTISER - DUNDEE	Y	Y	229	0	0%	Not targeting Glasgow
Johnston Press	EDINBURGH - EVENING NEWS	Y	Y	195	0	0%	Not targeting Glasgow
Romanes Media Group (formerly Dunfermline Press)	Herald North Group	N	Y	61	0	0%	Not targeting Glasgow
D C Thomson & Co Ltd	DUNDEE EVENING TELEGRAPH	Y	Y	1	0	0%	Not targeting Glasgow

Source: Ofcom analysis; JICREG, April 2012, 96.3 Real XS TSA

Notes: Table ranked by % reach within the 96.3 Real XS TSA

Fig 29: Share of circulation and number of titles by media owner in the 96.3 Real XS TSA

	Share of circulation	Number of titles
Trinity Mirror Plc	52.8%	5
Newsquest Media Group	24.4%	3
Johnston Press	12.8%	6
Romanes Media Group (formerly Dunfermline Press)	9.7%	7
Oban Times Ltd	0.2%	1
D C Thomson & Co Ltd	0.0%	2
E & R Inglis	0.1%	1
Orkney Media Group Ltd	0.0%	1

Source: JICREG

3. Television

A1.97 There are two providers of regional television news each available across the whole of the 96.3 Real XS TSA: BBC One and STV³².

A1.98 BARB data shows that the average weekly reach to regional television news in Scotland by BBC One and STV combined is 60%³³.

4. Online

A1.99 There is a range of websites published by the BBC, print media owners and local radio companies. There are four³⁴ BBC news websites serving Central Scotland - Tayside & Central, Edinburgh, Fife & East and Glasgow & West – in addition to websites provided by BBC Radio Scotland and BBC Radio nan Gàidheal. The Newspaper Society indicates that 22 local print titles also provide a website. Most commercial or community radio stations also provide a website but these tend to provide only schedule information rather than bespoke regional news content.

A1.100 According to analysis undertaken by Birmingham University³⁵ there are 13 additional independent providers of online nations, regional and local news and current affairs content. It is uncertain what level of nations, regional and local news these sites carry. Our understanding is that they are focused on tightly defined local areas and we have seen no evidence to suggest that they have the capacity to influence the democratic debate in Scotland.

The following sections relate to cross platform consumption and impact drawing on a range of existing Ofcom surveys.

5. Cross-platform consumption

A1.101 According to Ofcom research (2012), when respondents in Scotland as a whole were asked about the platforms they use for local media, the results showed that local

³² **Addendum:** The following footnote has been added since the report was submitted: We do not have evidence to suggest that BBC ALBA should be treated as a separate local/nations news wholesale provider.

³³ Based on total minutes of viewing of 'News: Regional News' genre. Reach based on 3mins consecutive, full weeks only based on 'News: Regional News' genre. 2011

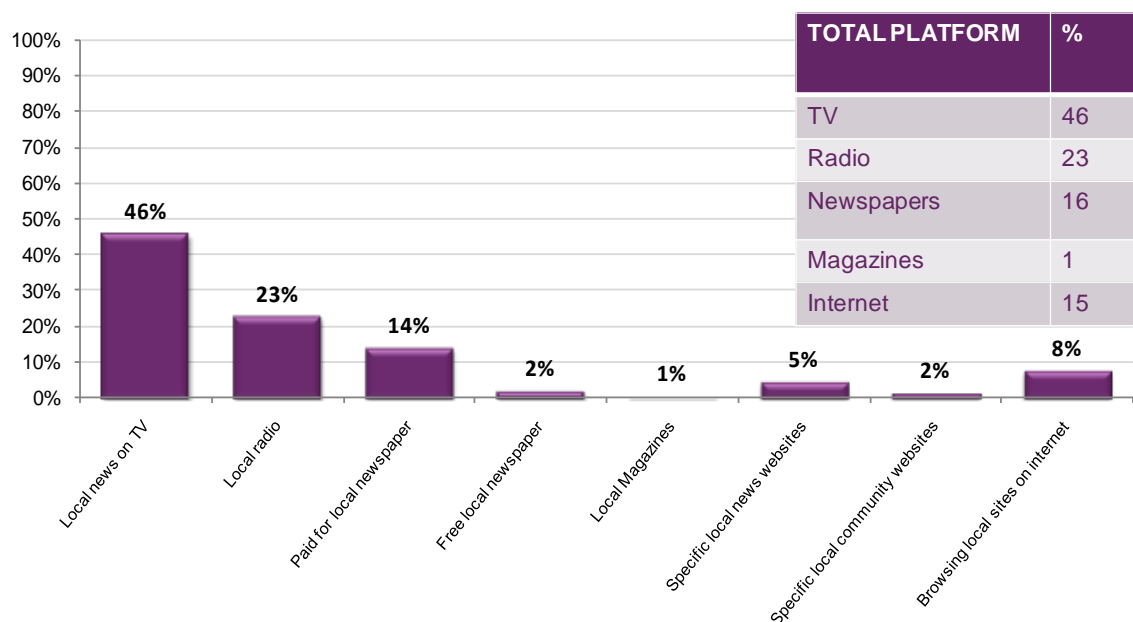
³⁴ **Erratum:** This has been changed from the word 'two' to 'four' since the report was submitted.

³⁵ A database of hyperlocal websites has been established by Openly Local and analysed by Birmingham City University in May 2012.

radio commanded a substantial 'share of references ' (23%), ranking second to TV (46 %).

A1.102The research also indicates that 2% of respondents in Scotland use only local radio on a weekly basis. However, the same research shows that 46% of respondents use local radio on a weekly basis while on average, respondents use 2.6 local media platforms (from among TV, print, online, radio)³⁶. We note, however, that local radio usage indicated through this research is lower than RAJAR estimates as seen in chart 1 which indicates that 66% of people in the 96.3 Real XS TSA listen to local radio each week.

Fig 30: Share of References for local media platforms - Scotland



Source: Ofcom Local Media Survey 2012³⁷
Base: All in Scotland, 192

Impact

A1.103According to Ofcom research (2011), when respondents in Scotland overall were asked what was their main source of news to find out "What's going on in my nation", radio was cited by 5% of respondents (alongside press) while 10% cited press and 77% cited television³⁸.

A1.104In Scotland, 49% of people indicate that TV is their main source for news about their local area followed by print (13%) and then radio (9%).

A1.105Research undertaken by Ofcom³⁹ provides an overview of the perceived personal importance of each local media platform among users of each platform at a UK-level. The results showed that 59% of viewers scored local news on TV 7 or higher out of 10 in terms of its importance as a local media source. Whereas 44% of listeners scored local radio as important, 43% of readers did so for paid for local print and 29%

³⁶ Source: Ofcom research undertaken by Ipsos Mori (May, 2012).

³⁷ <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

³⁸ Source: Ofcom's media tracker (2011).

³⁹ Source: Ofcom research undertaken by Ipsos Mori (2012).

for free local print. 38% scored 'internet in general' highly on importance, 28% for local news websites, 37% for local community sites, and 27% for local magazines.

Contextual factors

A1.106 Scotland is a distinct democratic unit. Decisions taken by the Scottish Parliament have a significant bearing on a wide range of public policy issues (covering for example, health, education and transport). In assessing the plurality of persons with control over media enterprises, we have given weight to the need for Scottish audiences to have access to a wide range of sources of nations news and current affairs, from a plurality of media owners.

Area of interest 5: Smooth Radio Glasgow TSA

Geography

A1.107 The map of Central Scotland above illustrates the Global Radio and GMG Radio stations being considered.

A1.108 The second primary area of interest is the overlap between the GMG Radio and Global Radio stations within the Smooth Radio Glasgow TSA. It has an estimated population of 1.7m adults⁴⁰.

Fig 31: GMG/Global TSA population overlap

	TSA population	Overlap population between Global and GMG stations	% of TSA population in overlap area
Smooth Glasgow TSA (GMG)	1,900,000	1,714,000	90%
Capital Scotland TSA (Global)	2,755,000	1,714,000	62%

Source: RAJAR Q2 2012, 12 month weight, adults 15+

Availability and consumption

1. Radio

A1.109 The table below lists all of the local radio stations available within the Smooth Radio Glasgow TSA, including those not measured by RAJAR such as community services. In total, we have identified 25 local radio stations available to some degree across this area. However, we have excluded some of these services from our availability analysis on the basis that they are small-scale; or serve a niche community.

A1.110 On this basis in the post-merger scenario we conclude there are eight sources providing local news on radio in this area (96.3 Real XS, Real Radio, Smooth Radio Glasgow, Capital Scotland, Clyde 1, Clyde 2, BBC Radio Scotland, BBC Radio nan Gàidheal), with three owners (Global Radio, Bauer and the BBC).

A1.111 The data is based on the RAJAR Q2 2012 survey of all adults 15+ in the Smooth Radio Glasgow TSA using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio. We have only considered the local services by each media owner. Figures may also include a small amount of listening to other local stations provided by a media owner but targeting neighbouring TSAs.

A1.112 The table also shows radio consumption in the Smooth Radio Glasgow TSA. The figures show that Bauer's Clyde 1 is the most listened to station in this TSA with 541,000 adults tuning in each week, 29% of the adult population. Excluding the national commercial and BBC network stations, Clyde 1 takes almost a quarter (23%)

⁴⁰ Source: RAJAR Q2 2012, 12 month weighting, adults 15+

of the share of the listening to local stations (using the base of any local commercial station or any BBC local/regional station).

Fig 32: Local radio availability and consumption in the Smooth Radio Glasgow TSA

Media Owner (post-merger)	Platform	Station	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)	% of Smooth TSA	% of TSA within Smooth TSA	Explanation for omission
Global	Radio	Smooth Radio Glasgow	15%	283	13%	100%	100%	-
BBC	Radio	Radio Scotland	21%	390	13%	100%	43%	-
BBC	Radio	nan Gàidheal	-	-	-	100%	43%	-
Bauer	Radio	Clyde 1	29%	541	23%	98%	100%	-
Bauer	Radio	Clyde 2	10%	191	8%	98%	100%	-
Global	Radio	Real Radio Scotland	22%	419	21%	90%	63%	-
Global	Radio	Capital Scotland	17%	329	12%	90%	62%	-
Global	Radio	96.3 Real XS	3%	62	2%	43%	100%	-
Independent	Radio	Central FM	-	-	-	9%	77%	Small-scale
Bauer	Radio	ForthOne	-	-	-	7%	12%	Doesn't target TSA
Bauer	Radio	Forth2	-	-	-	7%	12%	Doesn't target TSA
Community	Radio	Insight Radio	-	-	-	-	-	Small-scale
Community	Radio	Sunny Govan Radio	-	-	-	-	-	Small-scale
Community	Radio	Awaz FM	-	-	-	-	-	Small-scale
Community	Radio	Revival FM	-	-	-	-	-	Small-scale
Community	Radio	98.5 Garrison FM (Edinburgh)	-	-	-	-	-	Small-scale
Community	Radio	98.8 Castle FM	-	-	-	-	-	Small-scale
Community	Radio	Black Diamond FM	-	-	-	-	-	Small-scale
Community	Radio	Bute FM	-	-	-	-	-	Small-scale
Community	Radio	Dunoon Community Radio	-	-	-	-	-	Small-scale
Community	Radio	Celtic Music Radio	-	-	-	-	-	Small-scale
Community	Radio	Pulse Community Radio	-	-	-	-	-	Small-scale
Community	Radio	Camglen Radio-	-	-	-	-	-	Small-scale
Community	Radio	Celtic Music Radio FM-	-	-	-	-	-	Small-scale
Community	Radio	3TFM	-	-	-	-	-	Small-scale

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, Smooth Radio Glasgow TSA

Notes: Table ranked by % coverage within the Smooth Radio Glasgow TSA

Weekly reach(000s) is the number of people aged 15+ who listen to a radio station within at least one quarter-hour period over the course of a week

Weekly reach % is the weekly reach expressed as a proportion of the population within the base TSA

Share of local radio is the percentage of local radio listening hours that a station accounts for within the TSA

-Denotes community station not yet on air

A1.113The table below shows the listening figures for the key media owners in the TSA.

Post-merger Global Radio has a 49% share of listening to any local radio in the Smooth Radio Glasgow⁴¹ TSA. Bauer has a 36% share. Post merger, the combined weekly reach to Global Radio stations is 806,000, 42% of the adult population. The combined reach to Bauer local stations is 718,000 adults (38%).

Fig 33: Weekly reach and share by media owner (pre and post merger) in the Smooth Radio Glasgow TSA

	Media owner	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)
Pre-merger	Global	17%	329	12%
	GMG	34%	649	37%
Post-merger	Global	42%	806	49%
	Bauer	38%	718	36%
	BBC	21%	391	13%

Source: RAJAR Q2 2012, 12 month weight, Smooth Radio Glasgow TSA

2. Print

A1.114The tables below show the availability of local print media in the Smooth Radio Glasgow TSA. In total, we have identified 46 local print media titles available to

⁴¹ Erratum: The letters 'XS' have been removed since the report was submitted.

some degree across this area. There are 5 free titles and 41 paid for titles, and 9 daily and 37 weekly titles available across the TSA.

A1.115 However, we have excluded some titles from our analysis on the basis that they are not targeting the Smooth Radio Glasgow TSA population. In addition we note that News International's Scottish Sun is also available in the area and is included in our count of print sources.

A1.116 On this basis we conclude there are 35 retail providers of local news in print media in this area (detailed in the 'Title' column e.g. Clydebank Post) with six wholesale providers (Romanes Media Group, Trinity Mirror Plc, Johnston Press, Newsquest Media Group, E&R Inglis, News International).

A1.117 Trinity Mirror's titles account for over half (51.1%) of the share of circulation in this TSA and it also has more titles available than any other group (15). Johnston Press has the second largest share (21.7%) and also the second highest number of titles (13). There are four groups with either one or two titles available; in total these titles count for less than 1% of total circulation. The Daily Record, owned by Trinity Mirror, is the most read title in this area, reaching 29.1% of the population (551,734 people).

Fig 34: Local print title availability and consumption in Smooth Radio Glasgow TSA

Media Owner	Title	Daily?	Paid?	Reach	Reach as % of TSA	% of reach in TSA	Explanation for omission
Trinity Mirror Plc	AIRDRIE & COATBRIDGE ADVERTISER	N	Y	40052	2	100%	-
Romanes Media Group (formerly Dunfermline Press)	Clydebank Post	N	Y	25605	1	100%	-
Johnston Press	Cumbernauld News & Kilsyth Chronicle	N	Y	20960	1	100%	-
Romanes Media Group (formerly Dunfermline Press)	Dumbarton Vale of Leven Reporter	N	Y	9911	1	100%	-
Trinity Mirror Plc	EAST KILBRIDE NEWS	N	Y	26136	1	100%	-
Johnston Press	Falkirk Grangemouth & Linlithgow Advertiser	N	N	46689	2	100%	-
Johnston Press	Glasgow South & Eastwood Extra	N	N	43405	2	100%	-
Romanes Media Group (formerly Dunfermline Press)	Greenock Telegraph	Y	Y	33825	2	100%	-
Trinity Mirror Plc	HAMILTON ADVERTISER	N	Y	48182	3	100%	-
Trinity Mirror Plc	IRVINE HERALD	N	Y	23942	1	100%	-
Trinity Mirror Plc	KILMARNOCK STANDARD	N	Y	39275	2	100%	-
Johnston Press	Kirkintilloch Herald	N	Y	27340	1	100%	-
Trinity Mirror Plc	LENNOX HERALD	N	Y	26861	1	100%	-
Johnston Press	Milngavie & Bearsden Herald	N	Y	15475	1	100%	-
Johnston Press	Motherwell Times Series	N	Y	30059	2	100%	-
Romanes Media Group (formerly Dunfermline Press)	Paisley & Renfrewshire Gazette Series	N	Y	18685	1	100%	-
Trinity Mirror Plc	PAISLEY DAILY EXPRESS	Y	Y	19425	1	100%	-
Romanes Media Group (formerly Dunfermline Press)	Paisley People	N	N	6314	0	100%	-
Trinity Mirror Plc	RUTHERGLEN REFORMER	N	Y	11219	1	100%	-
Trinity Mirror Plc	The Glaswegian	N	N	71513	4	100%	-
Trinity Mirror Plc	WISHAW PRESS	N	Y	23112	1	100%	-
Romanes Media Group (formerly Dunfermline Press)	Helensburgh Advertiser	N	Y	15320	1	100%	-
Romanes Media Group (formerly Dunfermline Press)	Herald North Group	N	Y	48593	3	100%	-
Newsquest Media Group	GLASGOW - EVENING TIMES	Y	Y	143509	8	99%	-
Johnston Press	Falkirk Herald	N	Y	57584	3	97%	-
Trinity Mirror Plc	STIRLING OBSERVER (WED)	N	Y	22553	1	91%	-
Johnston Press	Lanark & Carluke Gazette	N	Y	23036	1	89%	-
E & R Inglis	Dunoon Observer & Argyllshire Standard	N	Y	10056	1	83%	-
Trinity Mirror Plc	STIRLING OBSERVER (FRI)	N	Y	12783	1	79%	-
Newsquest Media Group	THE HERALD - SCOTLAND	Y	Y	115407	6	78%	-
Trinity Mirror Plc	DAILY RECORD - SCOTLAND	Y	Y	551734	29	65%	-
Newsquest Media Group	SUNDAY HERALD - SCOTLAND	N	Y	77667	4	55%	-
Romanes Media Group (formerly Dunfermline Press)	Stirling News	N	N	6960	0	29%	Doesn't target Glasgow
Oban Times Ltd	Arran Banner	N	Y	2069	0	29%	Doesn't target Glasgow
Johnston Press	SCOTLAND ON SUNDAY	N	Y	35403	2	21%	-
Trinity Mirror Plc	WEST LOTHIAN COURIER	N	Y	11113	1	19%	-
Johnston Press	Cumnock Chronicle & Muirkirk Advertiser	N	Y	3027	0	18%	Doesn't target Glasgow
Johnston Press	THE SCOTSMAN	Y	Y	13930	1	10%	-
Trinity Mirror Plc	AYRSHIRE POST SERIES	N	Y	1982	0	4%	Doesn't target Glasgow
Johnston Press	The Buteman	N	Y	143	0	2%	Doesn't target Glasgow
Romanes Media Group (formerly Dunfermline Press)	Ayr Advertiser	N	Y	119	0	1%	Doesn't target Glasgow
Orkney Media Group Ltd	The Orcadian - Orkney	N	Y	239	0	1%	Doesn't target Glasgow
Oban Times Ltd	Oban Times & W Highland Times	N	Y	488	0	1%	Doesn't target Glasgow
D C Thomson & Co Ltd	COURIER & ADVERTISER - DUNDEE	Y	Y	1282	0	1%	Doesn't target Glasgow
Johnston Press	EDINBURGH - EVENING NEWS	Y	Y	699	0	1%	Doesn't target Glasgow
D C Thomson & Co Ltd	DUNDEE EVENING TELEGRAPH	Y	Y	1	0	0%	Doesn't target Glasgow

Source: Ofcom analysis; JICREG, April 2012, Smooth Radio Glasgow TSA

Notes: Table ranked by % reach within the Smooth Radio Glasgow TSA

Fig 35: Share of circulation and number of titles by media owner in the Smooth Radio Glasgow TSA

	Share of circulation	Number of titles
Trinity Mirror Plc	51.1%	15
Johnston Press	21.7%	13
Newsquest Media Group	16.2%	3
Romanes Media Group (formerly Dunfermline Press)	10.1%	9
E & R Inglis	0.6%	1
Oban Times Ltd	0.1%	2
D C Thomson & Co Ltd	0.1%	2
Orkney Media Group Ltd	0.0%	1

Source: JICREG

3. Television

A1.118 There are two providers of regional television news each available across the whole of the Smooth Radio Glasgow TSA: BBC One and STV⁴².

A1.119 BARB data shows that the average weekly reach to regional television news in Scotland by BBC One and STV combined is 60%⁴³.

4. Online

A1.120 There is a range of websites published by the BBC, print media owners and local radio companies. There are four⁴⁴ BBC news websites serving Central Scotland - Tayside & Central, Edinburgh, Fife & East and Glasgow & West – in addition to websites provided by BBC Radio Scotland and BBC Radio nan Gàidheal. The Newspaper Society indicates that 22 local print titles also provide a website. Most commercial or community radio stations also provide a website but these tend to provide only schedule information rather than bespoke regional news content.

A1.121 According to analysis undertaken by Birmingham University⁴⁵ there are 13 additional independent providers of online nations, regional and local news and current affairs content. It is uncertain what level of nations, regional and local news these sites carry. Our understanding is that they are focused on tightly defined local areas and we have seen no evidence to suggest that they have the capacity to influence the democratic debate in Scotland.

The following sections relate to cross platform consumption and impact drawing on a range of existing Ofcom surveys.

5. Cross-platform consumption

A1.122 According to Ofcom research (2012), when respondents in Scotland as a whole were asked about the platforms they use for local media, the results showed that local radio commanded a substantial 'share of references' (23%), ranking second to TV (46 %).

A1.123 The research also indicates that 2% of respondents in Scotland use only local radio on a weekly basis. However, the same research shows that 46% of respondents use local radio on a weekly basis while on average, respondents use 2.6 local media platforms (from among TV, print, online, radio)⁴⁶. We note, however, that, local radio usage indicated through this research is lower than RAJAR estimates as seen in chart 1 which indicates that 66% of people in the 96.3 Real XS TSA listen to local radio each week.

⁴² **Addendum:** The following footnote has been added since the report was submitted: We do not have evidence to suggest that BBC ALBA should be treated as a separate local/nations news wholesale provider.

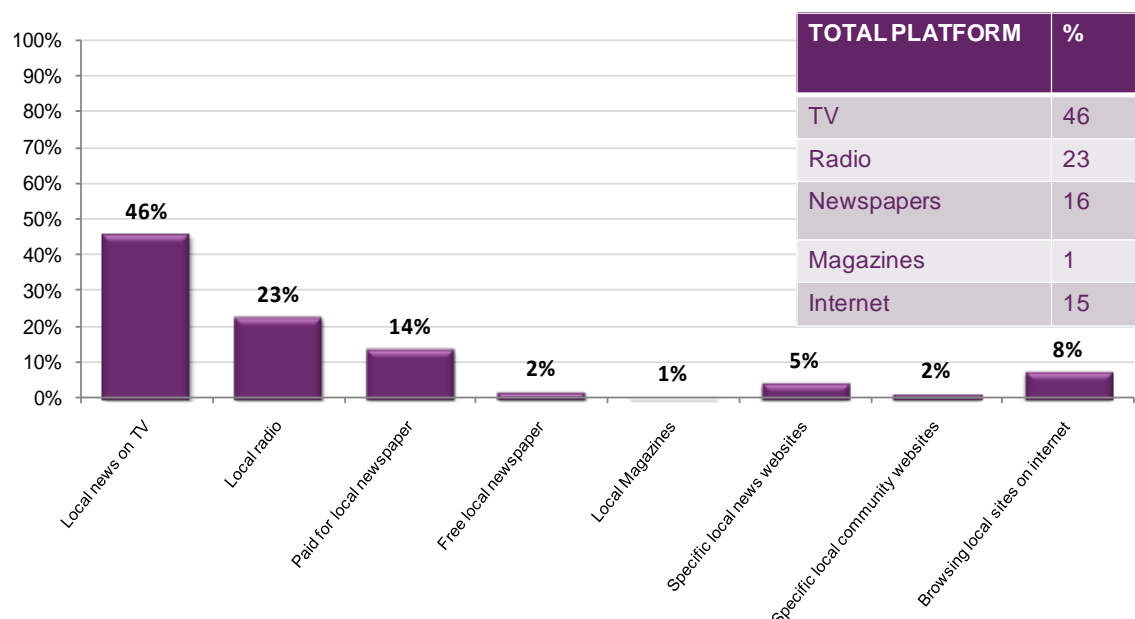
⁴³ Based on total minutes of viewing of 'News: Regional News' genre. Reach based on 3mins consecutive, full weeks only based on 'News: Regional News' genre. 2011

⁴⁴ **Erratum:** The word 'two' has been changed to 'four' since the report was submitted.

⁴⁵ A database of hyperlocal websites has been established by Openly Local and analysed by Birmingham City University in May 2012.

⁴⁶ Source: Ofcom research undertaken by Ipsos Mori (May, 2012).

Fig 36: Share of References for local media platforms - Scotland



Source: Ofcom Local Media Survey 2012⁴⁷

Base: All in Scotland, 192

Impact

A1.124 According to Ofcom research (2011), when respondents in Scotland overall were asked what was their main source to find out “What’s going on in my nation”, radio was cited by 5% of respondents (alongside press) while 10% cited press and 77% cited television⁴⁸.

A1.125 In Scotland, 49% of people indicate that TV is their main source for news about their local area followed by print (13%) and then radio (9%).

A1.126 Research undertaken by Ofcom⁴⁹ also provides an overview of the perceived personal importance of each local media platform among users of each platform at a UK-level. The results showed that 59% of viewers scored local news on TV 7 or higher out of 10 in terms of its importance as a local media source. Whereas 44% of listeners scored local radio as important, 43% of readers did so for paid for local print and 29% for free local print. 38% scored ‘internet in general’ highly on importance, 28% for local news websites, 37% for local community sites, and 27% for local magazines.

Contextual factors

Scotland is a distinct democratic unit. Decisions taken by the Scottish Parliament have a significant bearing on a wide range of public policy issues (covering for example, health, education and transport). In assessing the plurality of persons with control over media enterprises, we have given weight to the need for Scottish audiences to have access to a wide range of sources of nations news and current affairs, from a plurality of media owners.

⁴⁷ <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

⁴⁸ Source: Ofcom’s media tracker (2011).

⁴⁹ Source: Ofcom research undertaken by Ipsos Mori (2012).

Area of interest 6: Real Radio Scotland TSA

A1.127 The map of Central Scotland above illustrates the Global Radio and GMG Radio stations being considered.

A1.128 The third primary area of interest is the overlap between the GMG Radio and Global Radio stations within the Real Radio Scotland TSA. It has an estimated population of 2.7m adults⁵⁰.

Fig 37: GMG/Global TSA population overlap

	TSA population	Overlap population between Global and GMG stations	% of TSA population in overlap area
Real Scotland TSA (GMG)	2,732,000	2,732,000	100%
Capital Scotland TSA (Global)	2,755,000	2,732,000	99%

Source: RAJAR Q2 2012, 12 month weight, adults 15+

Availability and consumption

1. Radio

A1.129 The table below lists all of the local radio stations available within the Real Radio Scotland TSA, including those not measured by RAJAR such as community services. In total, we have identified 28 local radio stations available to some degree across this area. However, we have excluded some of these services from our availability analysis on the basis that they are small-scale stations serving a niche community.

A1.130 On this basis in the post-merger scenario we conclude there are ten sources providing local news on radio in this area (96.3 Real XS, Real Radio, Smooth Radio Glasgow, Capital Scotland, Clyde 1, Clyde 2, ForthOne, Forth2, BBC Radio Scotland, BBC Radio nan Gàidheal), with three owners (Global, Bauer and the BBC).

A1.131 The data is based on the RAJAR Q2 2012 survey of all adults 15+ in the Real Radio Scotland TSA using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio. We have only considered the local services provided by each media owner. Figures may also include a small amount of listening to other local stations provided by a media owner but targeting neighbouring TSAs.

A1.132 The table also shows radio consumption in the Real Radio Scotland TSA. The figures show that GMG's Real Radio Scotland is the most listened to station in this TSA with 618,000 adults tuning in each week, almost a quarter of the available population (23%). Excluding the national commercial and BBC network stations, Real takes over a fifth (20%) of the share of the listening to local stations (using the base of any local commercial station or any BBC local/regional station).

⁵⁰ Source: RAJAR Q2 2012, 12 month weighting, adults 15+

Fig 38: Local radio availability and consumption in the Real Radio Scotland TSA

Media Owner (post-merger)	Station	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)	% of RRS TSA	% of TSA within RRS TSA	Explanation for omission
Global	Real Radio Scotland	23%	618	21%	100%	100%	-
Global	Capital Scotland	19%	513	14%	100%	99%	-
BBC	Radio Scotland	20%	536	13%	100%	62%	-
BBC	nan Gàidheal	-	-	-	100%	62%	-
Global	Smooth Radio Glasgow	10%	272	9%	63%	90%	-
Bauer	Clyde 1	19%	520	17%	61%	90%	-
Bauer	Clyde 2	7%	177	5%	61%	90%	-
Bauer	ForthOne	13%	357	13%	41%	100%	-
Bauer	Forth2	3%	81	2%	41%	100%	-
Global	96.3 Real XS	2%	62	1%	30%	100%	-
Independent	Kingdom FM	-	-	-	-	-	Small-scale
Independent	Central FM	-	-	-	-	-	Small-scale
Bauer	Tay FM	-	-	-	-	-	Small-scale
Bauer	Tay AM	-	-	-	-	-	Small-scale
Independent	Your Radio	-	-	-	-	-	Small-scale
Community	Sunny Govan Radio	-	-	-	-	-	Small-scale
Community	Awaz FM	-	-	-	-	-	Small-scale
Community	Revival FM	-	-	-	-	-	Small-scale
Community	98.5 Garrison FM (Edinburgh)	-	-	-	-	-	Small-scale
Community	98.8 Castle FM	-	-	-	-	-	Small-scale
Community	Black Diamond FM	-	-	-	-	-	Small-scale
Community	Bute FM	-	-	-	-	-	Small-scale
Community	Dunoon Community Radio	-	-	-	-	-	Small-scale
Community	Celtic Music Radio AM	-	-	-	-	-	Small-scale
Community	Celtic Music Radio FM-	-	-	-	-	-	Small-scale
Community	Pulse Community Radio	-	-	-	-	-	Small-scale
Community	Camglen Radio-	-	-	-	-	-	Small-scale
Community	3TFM	-	-	-	-	-	Small-scale

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, Real Radio Scotland TSA

Notes: Table ranked by % coverage within the Real Radio Scotland TSA

Weekly reach(000s) is the number of people aged 15+ who listen to a radio station within at least one quarter-hour period over the course of a week

Weekly reach % is the weekly reach expressed as a proportion of the population within the base TSA

Share of local radio is the percentage of local radio listening hours that a station accounts for within the TSA

-Denotes community station not yet on air.

A1.133The table below shows the listening figures for the key media owners in the TSA.

Post-merger Global Radio has a 46% share of listening to any local radio in the Real Radio Scotland TSA. Bauer has a 36% share. The combined weekly reach to Global Radio stations post-merger is 1.1m, 40% of the adult population. The combined reach to Bauer local stations is 975,000 adults (36%).

Fig 39: Weekly reach and share by media owner (pre and post merger) in the Real Radio Scotland TSA

	Media owner	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)
Pre-merger	Global	19%	513	14%
	GMG	31%	832	32%
Post-merger	Global	40%	1,100	46%
	Bauer	36%	975	36%
	BBC	20%	537	13%

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, Real Radio Scotland TSA

2. Print

A1.134The tables below show the availability of local print media in the Real Radio Scotland TSA. In total, we have identified 58 local print media titles available to some degree

across this area. There are 8 free titles and 50 paid for titles, and 9 daily and 49 weekly titles available across the TSA.

A1.135 However, we have excluded some titles from our analysis on the basis that they are not targeting the Real Radio Scotland TSA population. In addition we note that News International's Scottish Sun is also available in the area and is included in our count in our analysis.

A1.136 On this basis we conclude there are 49 retail providers of local news in print media in this area (detailed in the 'Title' column e.g. East Fife Mail) with seven wholesale providers (Romanes Media Group, Trinity Mirror Plc, Johnston Press, Newsquest Media Group, E&R Inglis, DC Thomson & Co Ltd, Oban Times Ltd).

A1.137 Although Johnston Press has the largest number of titles available in this area (21), Trinity Mirror account for a slightly larger share of circulation with their 14 titles. This is due to the large circulation and readership of the Daily Record, which is the most read title in the area. The Daily Record reaches 23.4% of the population (635,723 people) on a daily basis in this area.

Fig 40: Local print title availability and consumption in the Real Radio Scotland TSA

Media Owner	Titles	Daily?	Paid?	AIR	AIR as % of TSA	% of AIR in TSA	Explanation for omission
Johnston Press	Cumbernauld News & Kilsyth Chronicle	N	Y	20960	0.8%	100%	-
Johnston Press	East Fife Mail	N	Y	25237	0.9%	100%	-
Johnston Press	East Lothian News Group	N	Y	9516	0.4%	100%	-
Johnston Press	Falkirk Grangemouth & Linlithgow Advertiser	N	N	46689	1.7%	100%	-
Johnston Press	Falkirk Herald	N	Y	59179	2.2%	100%	-
Johnston Press	Fife Free Press	N	Y	37108	1.4%	100%	-
Johnston Press	Glasgow South & Eastwood Extra	N	N	43405	1.6%	100%	-
Johnston Press	Glenrothes Gazette	N	Y	13325	0.5%	100%	-
Johnston Press	Herald & Post West Lothian	N	N	46068	1.7%	100%	-
Johnston Press	Kirkintilloch Herald	N	Y	27340	1.0%	100%	-
Johnston Press	Linlithgowshire Journal & Gazette	N	Y	19494	0.7%	100%	-
Johnston Press	Midlothian Advertiser	N	Y	16559	0.6%	100%	-
Johnston Press	Milngavie & Bearsden Herald	N	Y	15475	0.6%	100%	-
Johnston Press	Motherwell Times Series	N	Y	30059	1.1%	100%	-
Romanes Media Group	Alloa & Hillfoots Advertiser Journal	N	Y	20645	0.8%	100%	-
Romanes Media Group	Clydebank Post	N	Y	25605	0.9%	100%	-
Romanes Media Group	Dumbarton Vale of Leven Reporter	N	Y	9911	0.4%	100%	-
Romanes Media Group	Dunfermline Press & West of Fife Advertiser	N	Y	41127	1.5%	100%	-
Romanes Media Group	Fife & Kinross Extra	N	N	36581	1.4%	100%	-
Romanes Media Group	Paisley & Renfrewshire Gazette Series	N	Y	18685	0.7%	100%	-
Romanes Media Group	Paisley People	N	N	6314	0.2%	100%	-
Romanes Media Group	Stirling News	N	N	24023	0.9%	100%	-
Trinity Mirror Plc	AIRDRIE & COATBRIDGE ADVERTISER	N	Y	40052	1.5%	100%	-
Trinity Mirror Plc	EAST KILBRIDE NEWS	N	Y	26136	1.0%	100%	-
Trinity Mirror Plc	HAMILTON ADVERTISER	N	Y	48182	1.8%	100%	-
Trinity Mirror Plc	LENNOX HERALD	N	Y	26861	1.0%	100%	-
Trinity Mirror Plc	PAISLEY DAILY EXPRESS	Y	Y	19425	0.7%	100%	-
Trinity Mirror Plc	RUTHERGLEN REFORMER	N	Y	11219	0.4%	100%	-
Trinity Mirror Plc	The Glaswegian	N	N	71513	2.6%	100%	-
Trinity Mirror Plc	WEST LOTHIAN COURIER	N	Y	56991	2.1%	100%	-
Trinity Mirror Plc	WISHAW PRESS	N	Y	23112	0.9%	100%	-
Romanes Media Group	Central Fife Times & Advertiser	N	Y	14346	0.5%	100%	-
Romanes Media Group	Helensburgh Advertiser	N	Y	15320	0.6%	100%	-
Romanes Media Group	Greenock Telegraph	Y	Y	33676	1.2%	100%	-
Johnston Press	EDINBURGH - EVENING NEWS	Y	Y	130272	4.8%	99%	-
Trinity Mirror Plc	STIRLING OBSERVER (WED)	N	Y	24567	0.9%	99%	-
Romanes Media Group	East Lothian Courier	N	Y	33616	1.2%	99%	-
Newsquest Media Group	GLASGOW - EVENING TIMES	Y	Y	139404	5.1%	96%	-
Johnston Press	Lanark & Carluke Gazette	N	Y	23036	0.9%	89%	-
Johnston Press	Fife Leader	N	N	53798	2.0%	88%	-
Trinity Mirror Plc	STIRLING OBSERVER (FRI)	N	Y	14120	0.5%	87%	-
E & R Inglis	Dunoon Observer & Argyllshire Standard	N	Y	10056	0.4%	83%	-
Trinity Mirror Plc	DAILY RECORD - SCOTLAND	Y	Y	635723	23.4%	75%	-
Newsquest Media Group	THE HERALD - SCOTLAND	Y	Y	110728	4.1%	75%	-
Newsquest Media Group	SUNDAY HERALD - SCOTLAND	N	Y	96244	3.5%	69%	-
Johnston Press	THE SCOTSMAN	Y	Y	98119	3.6%	68%	-
Johnston Press	SCOTLAND ON SUNDAY	N	Y	110663	4.1%	65%	-
Oban Times Ltd	Arran Banner	N	Y	1858	0.1%	26%	-
D C Thomson & Co Ltd	COURIER & ADVERTISER - DUNDEE	Y	Y	24696	0.9%	19%	-
Johnston Press	Berwickshire News East Lothian Herald	N	Y	1332	0.1%	10%	Not targeting Central Scotland
Romanes Media Group	Peeblesshire News	N	Y	1115	0.0%	10%	Not targeting Central Scotland
Orkney Media Group Ltd	The Orcadian - Orkney	N	Y	771	0.0%	4%	Not targeting Central Scotland
Johnston Press	The Buteman	N	Y	143	0.0%	2%	Not targeting Central Scotland
Romanes Media Group	Herald North Group	N	Y	915	0.0%	2%	Not targeting Central Scotland
Trinity Mirror Plc	PERTSHIRE ADVERTISER (FRI)	N	Y	542	0.0%	2%	Not targeting Central Scotland
Oban Times Ltd	Oban Times & W Highland Times	N	Y	488	0.0%	1%	Not targeting Central Scotland
Trinity Mirror Plc	PERTSHIRE ADVERTISER (TUE)	N	Y	282	0.0%	1%	Not targeting Central Scotland
D C Thomson & Co Ltd	DUNDEE EVENING TELEGRAPH	Y	Y	253	0.0%	1%	Not targeting Central Scotland

Source: Ofcom analysis; JICREG, April 2012, Real Radio Scotland TSA

Notes: Table ranked by % reach within the Real Radio Scotland TSA

Fig 41: Share of circulation and number of titles by media owner in the Real Radio Scotland TSA

	Share of circulation	Number of titles
Trinity Mirror Plc	37.5%	14
Johnston Press	35.7%	21
Romanes Media Group (formerly Dunfermline Press)	13.5%	14
Newsquest Media Group	11.4%	3
D C Thomson & Co Ltd	1.3%	2
E & R Inglis	0.4%	1
Oban Times Ltd	0.1%	2
Orkney Media Group Ltd	0.0%	1

Source: JICREG

3. Television

A1.138 There are two providers of regional television news each available across the whole of the Real Radio Scotland TSA: BBC One and STV⁵¹.

A1.139 BARB data shows that the average weekly reach to regional television news in Scotland by BBC One and STV combined is 60%⁵².

4. Online

A1.140 There is a range of websites published by the BBC, print media owners and local radio companies. There are four⁵³ BBC news websites serving Central Scotland - Tayside & Central, Edinburgh, Fife & East and Glasgow & West – in addition to websites provided by BBC Radio Scotland and BBC Radio nan Gàidheal. The Newspaper Society indicates that 22 local print titles also provide a website. Most commercial or community radio stations also provide a website but these tend to only provide schedule information rather than bespoke regional news content.

A1.141 According to analysis undertaken by Birmingham University⁵⁴ there are 13 additional independent providers of online nations, regional and local news and current affairs content. It is uncertain what level of nations, regional and local news these sites carry. Our understanding is that they are focused on tightly defined local areas and we have seen no evidence to suggest that they have the capacity to influence the democratic debate in Scotland.

The following sections relate to cross platform consumption and impact drawing on a range of existing Ofcom surveys.

5. Cross-platform consumption

A1.142 According to Ofcom research (2012), when respondents in Scotland as a whole were asked about the platforms they use for local media, the results showed that local radio commanded a substantial 'share of references' (23%), ranking second to TV (46 %).

A1.143 The research also indicates that 2% of respondents in Scotland use only local radio on a weekly basis. However, the same research shows that 46% of respondents use local radio on a weekly basis while on average, respondents use 2.6 local media platforms (from among TV, print, online, radio)⁵⁵. We note, however, that, local radio usage indicated through this research is lower than RAJAR estimates as seen in chart 1 which indicates that 66% of people in the 96.3 Real XS TSA listen to local radio each week.

⁵¹ **Addendum:** The following footnote has been added since the report was submitted: We do not have evidence to suggest that BBC ALBA should be treated as a separate local/nations news wholesale provider.

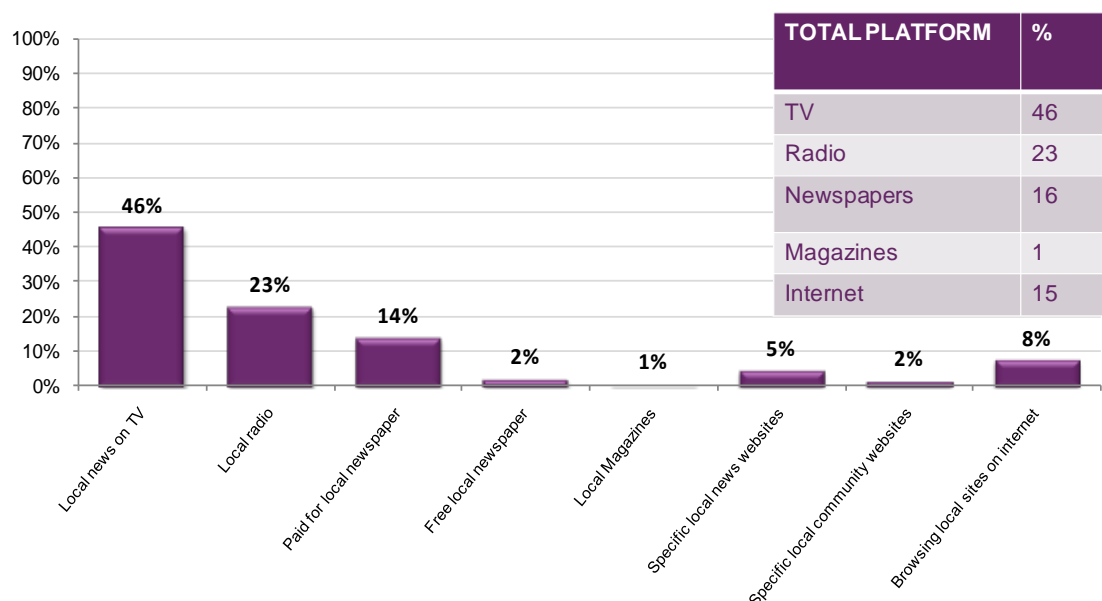
⁵² Based on total minutes of viewing of 'News: Regional News' genre. Reach based on 3mins consecutive, full weeks only based on 'News: Regional News' genre. 2011

⁵³ **Erratum:** the word 'two' has been changed to 'four' since the report was submitted.

⁵⁴ A database of hyperlocal websites has been established by Openly Local and analysed by Birmingham City University in May 2012.

⁵⁵ Source: Ofcom research undertaken by Ipsos Mori (May, 2012).

Fig 42: Share of References for local media platforms - Scotland



Source: Ofcom Local Media Survey 2012⁵⁶
Base: All in Scotland, 192

Impact

A1.144 According to Ofcom research (2011), when respondents in Scotland overall were asked what was their main source of news to find out “What’s going on in my nation”, radio was cited by 5% of respondents (alongside press) while 10% cited press and 77% cited television⁵⁷.

A1.145 In Scotland, 49% of people indicate that TV is their main source for news about their local area followed by print (13%) and radio (9%).

A1.146 Research undertaken by Ofcom⁵⁸ provides an overview of the perceived personal importance of each local media platform among users of each platform at a UK-level. The results showed that 59% of viewers scored local news on TV 7 or higher out of 10 in terms of its importance as a local media source. Whereas 44% of listeners scored local radio as important, 43% of readers did so for paid for local print and 29% for free local print. 38% scored ‘internet in general’ highly on importance, 28% for local news sites, 37% for community sites and 27% for local magazines.

Contextual factors

A1.147 Scotland is a distinct democratic unit. Decisions taken by the Scottish Parliament have a significant bearing on a wide range of public policy issues (covering for example, health, education and transport). In assessing the plurality of persons with control over media enterprises, we have given weight to the need for Scottish audiences to have access to a wide range of sources of nations news and current affairs, from a plurality of media owners.

⁵⁶ <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

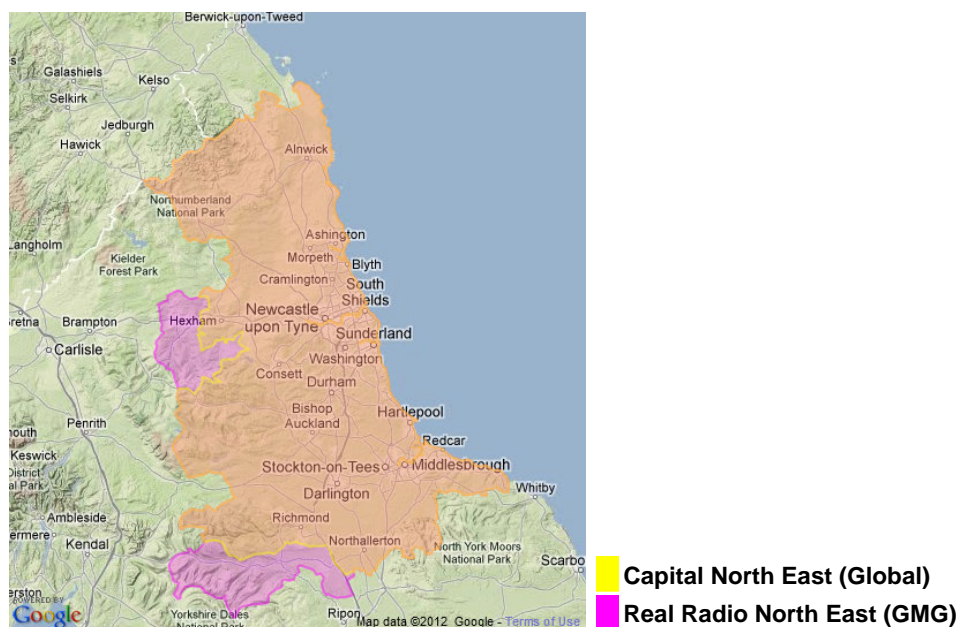
⁵⁷ Source: Ofcom’s media tracker (2011).

⁵⁸ Source: Ofcom research undertaken by Ipsos Mori (2012).

Area of interest 7: Capital North East TSA

A1.148 The map below shows the stations that we are considering in our analysis of the North East and how their TSAs overlap.

Fig 43: Map of North East England showing GMG Radio and Global Radio station TSAs



A1.149 The primary area of interest is the overlap between the GMG Radio and Global Radio stations. It has an estimated population of 2.2m adults⁵⁹.

A1.150 We have selected the Capital North East TSA as being the closest representation of the overlap population in this instance as 100% of adults within this TSA are situated in the area covered by both Global Radio and GMG Radio stations:

Fig 44: GMG Radio/Global Radio TSA population overlap

	TSA population	Overlap population between Global and GMG stations	% of TSA population in overlap area
Real Radio NE TSA (GMG)	2,264,000	2,239,000	99%
Capital NE TSA (Global)	2,239,000	2,239,000	100%

Source: RAJAR Q2 2012, 12 month weight, adults 15+

⁵⁹ Source: RAJAR Q2 2012, 12 month weighting, adults 15+

Availability and consumption

1. Radio

A1.151 The table below lists all of the local radio stations available within the Capital NE TSA, including those not measured by RAJAR such as community services. In total, we have identified 24 local radio stations available to some degree across this area. However, we have excluded some of these services from our availability analysis on the basis that they are either small-scale; serve a niche community or do not target the Capital NE TSA population.

A1.152 On this basis in the post-merger scenario we conclude there are eight sources providing local news on radio in this area (Capital, Real, Metro, Magic 1152, TFM, Magic 1170, BBC Radio Tees, BBC Newcastle), with three owners (Global Radio, Bauer and the BBC).

A1.153 The data is based on the RAJAR Q2 2012 survey of all adults 15+ in the Capital North East TSA using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio excluding Smooth Radio as this not provide local news. We have only considered the local services by each media owner. Figures may also include a small amount of listening to other local stations provided by a media owner but targeting neighbouring TSAs.

A1.154 The table also shows radio consumption in the Capital NE TSA. The figures show that Global Radio's Capital is the most listened to station in this TSA with 528,000 adults tuning in each week, almost a quarter of the available population (24%). Excluding the national commercial and BBC network stations, Capital takes a quarter of the share of the listening to local stations (using the base of any local commercial station or any BBC local/regional station). This includes listening to any local station recorded by the RAJAR respondent.

Table 45: Local radio availability and consumption in the Capital NE TSA

Media Owner (post-merger)	Station	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)	Coverage in the Capital NE TSA	% of TSA within Capital NE TSA	Explanation for omission
Global	Capital North East	24%	528	19%	100%	100%	-
Global	Real Radio NE	13%	292	9%	100%	99%	-
Global	Smooth Radio NE	18%	412	17%	100%	99%	-
Bauer	Metro Radio	17%	383	12%	67%	100%	-
Bauer	Magic 1152	8%	179	8%	67%	100%	-
BBC	Radio Newcastle	13%	291	11%	64%	99%	-
BBC	Radio Tees	6%	132	5%	64%	97%	-
Bauer	TFM Radio	8%	180	6%	36%	98%	-
Bauer	Magic 1170	4%	97	5%	36%	98%	-
UKRD	Sun FM	-	-	-	12%	100%	Small-scale
UKRD	Star Radio North	-	-	-	10%	100%	Small-scale
UKRD	Star Radio South	-	-	-	8%	100%	Small-scale
Independent	Yorkshire Radio	-	-	-	3%	1%	Doesn't target TSA
Community	Lionheart Radio	-	-	-	-	-	Small-scale
Community	NE1fm	-	-	-	-	-	Small-scale
Community	102.5 Radio Teesdale	-	-	-	-	-	Small-scale
Community	Cross Rhythms	-	-	-	-	-	Small-scale
Community	Spice FM	-	-	-	-	-	Small-scale
Community	107 Spark FM	-	-	-	-	-	Small-scale
Community	Community Voice FM	-	-	-	-	-	Small-scale
Community	Radio Hartlepool	-	-	-	-	-	Small-scale
Community	105.9 Bishop FM	-	-	-	-	-	Small-scale
Community	106.9 Garrison FM	-	-	-	-	-	Small-scale
Community	Drystone Radio	-	-	-	-	-	Small-scale

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, Capital NE TSA

Notes: Table ranked by % coverage within the Capital NE TSA

Weekly reach(000s) is the number of people aged 15+ who listen to a radio station within at least one quarter-hour period over the course of a week

Weekly reach % is the weekly reach expressed as a proportion of the population within the base TSA

Share of local radio is the percentage of local radio listening hours that a station accounts for within the TSA

A1.155 The table below shows the listening figures for the key media owners in the TSA. Post-merger Global Radio has a 34% share of listening to any local radio in the Capital NE TSA. Bauer has a 37% share. The combined weekly reach to Global Radio stations in the Capital NE TSA post-merger is 709,000, 32% of the adult population. The combined reach to Bauer local stations is 755,000 adults (34%).

Fig 46: Weekly reach and share by media owner (pre and post merger) in the Capital NE TSA

	Media owner	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)
Pre-merger*	Global	24%	528	23%
	GMG	13%	292	11%
Post-merger*	Global	32%	709	34%
	Bauer	34%	755	37%
	BBC	21%	460	20%

Source: RAJAR Q2 2012, 12 month weight, Capital NE TSA

*Excludes any contribution from Smooth Radio NE as this station provides no local news

2. Print

A1.156 The tables below show the availability of local print media in the Capital NE TSA. In total, we have identified 31 local print media titles available to some degree across this area. There are 12 free titles and 19 paid for and 10 daily and 21 weekly titles available across the TSA.

A1.157 However, we have excluded some titles from our analysis on the basis that they are not targeting the Capital NE TSA population or are small-scale.

A1.158 On this basis we conclude there are 24 retail providers of local news in print media in this area (detailed in the 'Title' column e.g. Newcastle Evening Chronicle) with four wholesale providers (Trinity Mirror Plc, Newsquest Media Group, Johnston Press, CN Group).

A1.159 Although Johnston Press has the largest number of titles available in this area (16), Trinity Mirror accounts for a slightly larger share of circulation with its 7 titles. This is due, in part, to the large circulation and readership of the Newcastle Upon Tyne Sunday Sun, which is the most read title in the area. The Sunday Sun reaches 9.1% of the population (200,700 people) on a weekly basis in the North East. Trinity Mirror also owns the daily title with the highest circulation, The Newcastle Evening Chronicle. Even so, three groups have a substantial share of circulation, Trinity Mirror (37.7%), Johnston Press (34.1%) and Newsquest (26.7%)

Fig 47: Local print title availability and consumption in the Capital NE TSA

Media Owner	Titles	Daily?	Paid?	Reach	AIR as % of TSA	% of reach in TSA	Explanation for omission
Trinity Mirror Plc	Newcastle Evening Chronicle	Y	P	174793	8	100	-
Trinity Mirror Plc	Teesside - Evening Gazette	Y	P	125733	6	100	-
Newsquest Media Group	The South Durham Advertiser Group	N	F	94449	4	100	-
Newsquest Media Group	The North Durham Advertiser Group	N	F	87888	4	100	-
Johnston Press	Northumberland News Post Leader	N	F	86173	4	100	-
Trinity Mirror Plc	Stockton & Billingham Herald & Post	N	F	80992	4	100	-
Johnston Press	Sunderland Echo	Y	P	79011	4	100	-
Johnston Press	News Guardian - Whitley Bay	N	F	76161	3	100	-
Trinity Mirror Plc	Middlesbrough Herald & Post	N	F	57244	3	100	-
Trinity Mirror Plc	East Cleveland Herald & Post	N	F	36002	2	100	-
Johnston Press	Shields Gazette	Y	P	35107	2	100	-
Johnston Press	Hartlepool Mail	Y	P	33324	2	100	-
Johnston Press	Washington Star	N	F	23715	1	100	-
Johnston Press	Seaham & Houghton Star Group	N	F	21879	1	100	-
Johnston Press	Peterlee Star	N	F	21719	1	100	-
Johnston Press	Morpeth Herald	N	P	5846	0	100	-
Trinity Mirror Plc	Newcastle Upon Tyne Sunday Sun	N	P	200700	9	97	-
Johnston Press	Northumberland Gazette	N	P	22211	1	95	-
Newsquest Media Group	The Northern Echo	Y	P	97059	4	95	-
Trinity Mirror Plc	Newcastle Journal	Y	P	96289	4	94	-
Newsquest Media Group	North Yorkshire Advertiser	N	F	27213	1	75	-
C N Group	Hexham Courant	N	P	31494	1	73	-
Newsquest Media Group	Darlington & Stockton Times	N	P	44399	2	69	-
Johnston Press	North Yorkshire News	N	F	26644	1	58	-
Johnston Press	Berwick Advertiser	N	P	2663	0	16	small scale within the TSA
Johnston Press	Whitby Gazette - Friday	N	P	3452	0	15	small scale within the TSA
Johnston Press	Yorkshire Post	Y	P	1807	0	1	Not targetting the TSA
Johnston Press	Harrogate Advertiser Group	N	P	206	0	0	Not targetting the TSA
Newsquest Media Group	Gazette & Herald - Yorkshire	N	P	47	0	0	Not targetting the TSA
Newsquest Media Group	The Press - York	Y	P	48	0	0	Not targetting the TSA
Johnston Press	Edinburgh - Evening News	Y	P	65	0	0	Not targetting the TSA

Source: Ofcom analysis; JICREG, April 2012, Capital NE TSA

Notes: Table ranked by % reach within the Capital NE TSA

Fig 48: Share of circulation and number of titles by media owner in the Capital NE TSA

	Share of circulation	Number of titles
Trinity Mirror Plc	37.7%	7
Johnston Press	34.1%	16
Newsquest Media Group	26.7%	7
C N Group	1.5%	1

Source: JICREG

3. Television

A1.160 There are two retail providers of regional television news each available across the whole of the Capital NE TSA: BBC One and ITV1.

A1.161 BARB data shows that the average weekly reach to regional television news in the North East by BBC One and ITV1 combined is 60%⁶⁰.

4. Online

A1.162 There is a range of websites published by the BBC, print media owners and local radio companies. There are two BBC news websites serving the North East - Tyne and Wear and Tees – in addition to websites provided by BBC Radio Tees and BBC Radio Newcastle. The Newspaper Society indicates that 26 local print titles also provide a website. Most commercial or community radio stations also provide a

⁶⁰ Based on total minutes of viewing of 'News: Regional News' genre. Reach based on 3mins consecutive, full weeks only based on 'News: Regional News' genre. 2011

website but these tend to provide only schedule information rather than bespoke regional news content.

A1.163 According to analysis undertaken by Birmingham University⁶¹ there are three additional independent providers of online national, regional and local news and current affairs content. It is uncertain what level of national, regional and local news these sites carry. Our understanding is that they are focused on tightly defined local areas and we have seen no evidence to suggest that they have the capacity to influence the democratic debate in the North East.

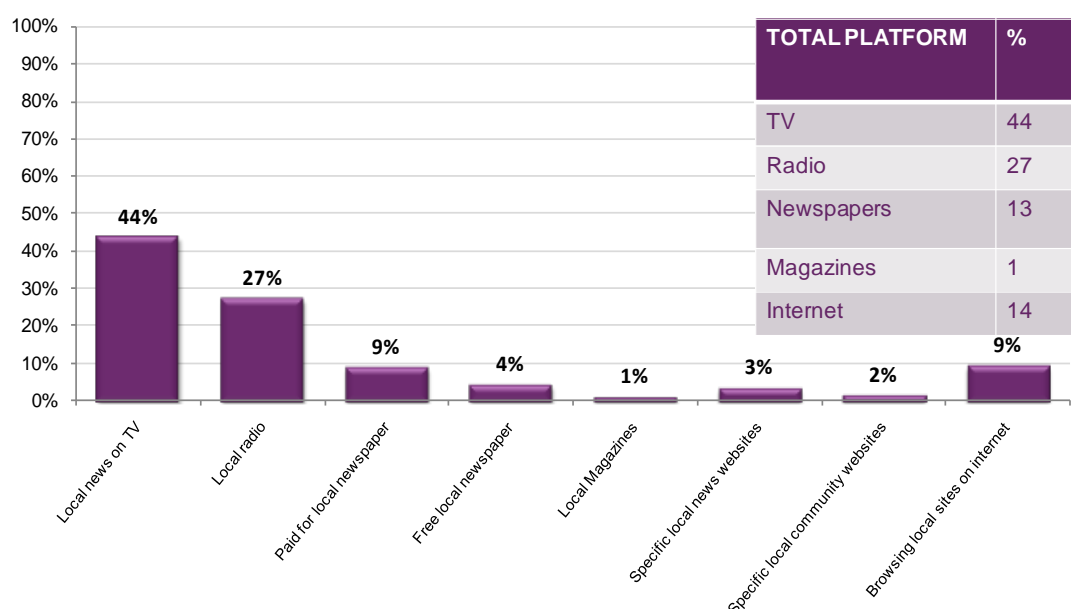
The following sections relate to cross platform consumption and impact drawing on a range of existing Ofcom surveys.

5. Cross-platform consumption

A1.164 According to Ofcom research (2012), when respondents in the North East were asked about the platforms they use for local media, the results showed that local radio commanded a substantial 'share of references' (27%), ranking second to TV (44%).

A1.165 The research also indicates that 1% of respondents in the North East use only local radio on a weekly basis. However, the same research shows that 53% of respondents use local radio on a weekly basis while on average, respondents use 2.7 local media platforms (from among TV, print, online, radio)⁶². We note, however, that local radio usage indicated through this research is lower than RAJAR estimates as seen in chart 1 which indicates that 69% of people in the Capital NE TSA listen to local radio each week.

Fig 49: Share of References for local media platforms – North East



Source: Ofcom Local Media Survey 2012⁶³
Base: All in North East, 102

⁶¹ A database of hyperlocal websites has been established by Openly Local and analysed by Birmingham City University in May 2012.

⁶² Source: Ofcom research undertaken by Ipsos Mori (May, 2012).

⁶³ <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

Impact

A1.166 Across the UK, TV is the main source named for local news (53%) followed by print (15%) and then radio (10%)⁶⁴.

A1.167 Research undertaken by Ofcom⁶⁵ also provides an overview of the perceived personal importance of each local media platform among users of each platform at a UK-level. The results showed that 59% of viewers scored local news on TV 7 or higher out of 10 in terms of its importance as a local media source. Whereas 44% of listeners scored local radio as important, 43% of readers did so for paid for local print and 29% for free local print. 38% scored 'internet in general' highly on importance, 28% for local news websites, 37% for local community sites, and 27% for local magazines.

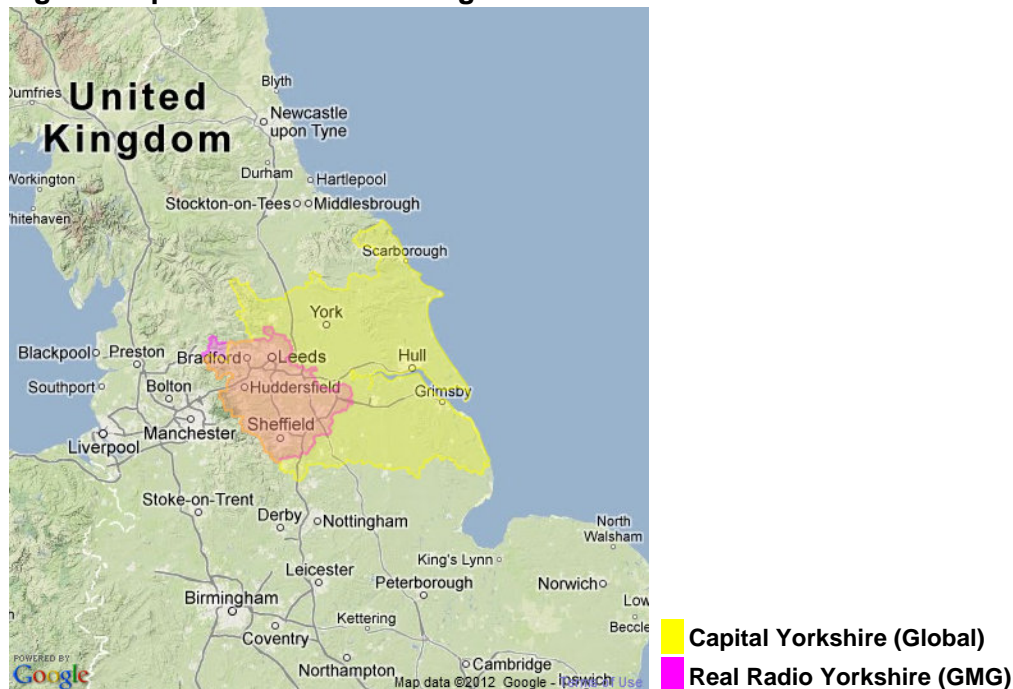
⁶⁴ Source: Ofcom's media tracker (2011).

⁶⁵ Source: Ofcom research undertaken by Ipsos Mori (2012).

Area of interest 8: Real Radio Yorkshire TSA

A1.168 The map below shows the stations that we are considering in our analysis of Yorkshire and how their TSAs overlap.

Fig 50: Map of Yorkshire showing GMG Radio and Global Radio station TSAs



A1.169 The primary area of interest is the overlap between the GMG Radio and Global Radio stations. It has an estimated population of 2.9m adults⁶⁶.

A1.170 We have selected the Real Radio Yorkshire TSA as being the closest representation of the overlap population in this instance as 99% of adults within this TSA are situated in the area covered by both Global Radio and GMG Radio stations.

Fig 51: GMG Radio/Global Radio TSA population overlap

	TSA population	Overlap population between Global and GMG stations	% of TSA population in overlap area
Real Radio Yorks TSA (GMG)	2,904,000	2,879,000	99%
Capital Yorks TSA (Global)	4,569,000	2,879,000	63%

Source: RAJAR Q2 2012, 12 month weight, adults 15+

⁶⁶ Source: RAJAR Q2 2012, 12 month weighting, adults 15+

Availability and consumption

1. Radio

A1.171 The table below lists all of the local radio stations available within the Real Radio Yorkshire TSA, including those not measured by RAJAR such as community services. In total, we have identified 28 local radio stations available to some degree across this area. However, we have excluded some of these services from our availability analysis on the basis that they are either small-scale; serve a niche community, or do not target the Real Radio Yorkshire TSA.

A1.172 On this basis in the post-merger scenario we conclude there are 15 sources for local news on radio in this area and five owners (Global Radio, Bauer, Leeds Utd AFC, UTV and the BBC).

A1.173 The data is based on the RAJAR Q2 2012 survey of all adults 15+ in the Real Radio Yorkshire TSA using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio. We have only considered the local services by each media owner. Figures may also include a small amount of listening to other local stations provided by a media owner but targeting neighbouring TSAs.

A1.174 The table also shows radio consumption in the Real Radio Yorkshire TSA. The figures show that Global Radio's Capital Yorkshire is the most listened to station in this TSA with 715,000 adults tuning in each week, a quarter of the available population (25%). Excluding the national commercial and BBC network stations, Capital takes over a quarter (26%) of the share of the listening to local stations (using the base of any local commercial station or any BBC local/regional station). This includes listening to any local station recorded by the RAJAR respondent.

Fig 52: Local radio availability and consumption in the Real Radio Yorkshire TSA

Media Owner (post-merger)	Station	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)	Coverage in the RRY TSA	% of TSA within the RRY TSA	Explanation for omission
Global	Real Radio Yorkshire	13%	379	15%	100%	100%	-
Leeds Utd AFC	Yorkshire Radio	2%	56	1%	100%	64%	-
Global	Capital Yorkshire	25%	715	26%	99%	63%	-
BBC	Radio Leeds	8%	236	9%	55%	96%	-
BBC	Radio Sheffield	8%	243	8%	40%	90%	-
Bauer	Hallam FM	12%	352	11%	40%	90%	-
Bauer	Magic AM	3%	92	4%	40%	90%	-
Bauer	Magic 828	4%	117	6%	34%	97%	-
UTV	The Pulse	-	-	-	29%	99%	-
UTV	Pulse 2	-	-	-	29%	99%	-
Bauer	96.3 Radio Aire	-	-	-	23%	96%	-
Lincs FM Group	Ridings FM	-	-	-	10%	100%	-
Lincs FM Group	Trax FM	-	-	-	8%	67%	-
Lincs FM Group	Dearne FM	-	-	-	8%	100%	-
Lincs FM Group	Rother FM	-	-	-	7%	100%	-
Independent	Peak 107 FM	-	-	-	5%	37%	Doesn't target TSA
Bauer	96.9 Viking FM	-	-	-	2%	6%	Doesn't target TSA
Bauer	Magic 1161	-	-	-	2%	6%	Doesn't target TSA
Independent	Sunrise Radio Yorks	-	-	-	-	-	No local news
Community	BCB 106.6FM	-	-	-	-	-	Small-scale
Community	Phoenix FM	-	-	-	-	-	Small-scale
Community	Sheffield Live!	-	-	-	-	-	Small-scale
Community	93.2fm Branch FM	-	-	-	-	-	Small-scale
Community	Radio Jcom	-	-	-	-	-	Small-scale
Community	Sine FM	-	-	-	-	-	Small-scale
Community	Redroad FM	-	-	-	-	-	Small-scale
Community	Penistone FM	-	-	-	-	-	Small-scale
Community	TMCR	-	-	-	-	-	Small-scale

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, Real Radio Yorkshire TSA

Notes: Table ranked by % coverage within the Real Radio Yorkshire TSA

Weekly reach(000s) is the number of people aged 15+ who listen to a radio station within at least one quarter-hour period over the course of a week

Weekly reach % is the weekly reach expressed as a proportion of the population within the base TSA

Share of local radio is the percentage of local radio listening hours that a station accounts for within the TSA

A1.175The table below shows the listening figures for the key media owners in the TSA.

Post-merger Global Radio has a 43% share of listening to any local radio in the Real Radio Yorkshire TSA. Bauer has a 26% share. The combined weekly reach to Global Radio stations post-merger is 968,000, 33% of the adult population. The combined reach to Bauer local stations is 637,000 adults (22%).

Fig 53: Weekly reach and share by media owner (pre and post merger) in the Real Radio Yorkshire TSA

	Media owner	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)
Pre-merger	Global	25%	715	26%
	GMG	15%	431	17%
Post-merger	Global	33%	968	43%
	Bauer	22%	637	26%
	BBC	18%	511	17%

Source: RAJAR Q2 2012, 12 month weight, Real Radio Yorkshire TSA

2. Print

A1.176 The tables below show the availability of local print media in the Real Radio Yorkshire TSA. In total, we have identified 43 local print media titles available to some degree across this area. There are 13 free titles and 30 paid for and 6 daily and 37 weekly titles available across the TSA.

A1.177 However, we have excluded some titles from our analysis on the basis that they are not targeting the Real Radio Yorkshire TSA population or are small-scale.

A1.178 On this basis we conclude there are 32 retail providers of local news in print media in this area (detailed in the 'Title' column e.g. Barnsley Chronicle) with four wholesale providers (Barnsley Chronicle Ltd, Garnett Dickinson Publishing Ltd, Johnston Press, Newsquest Media Group).

A1.179 Johnston Press' 28 titles account for the majority of circulation in this area (61.9%). Gannet Dickinson's titles account for the next largest share (15.6%) and it has 3 titles available here. Johnston Press' weekly free sheet, The Sheffield Weekly Gazette, has the highest reach, being read by 154,518 people (5.4% of the area's population) in its publication period.

Fig 54: Local print title availability and consumption in the Real Radio Yorkshire TSA

Media Owner	Title	Daily?	Paid?	Reach	AIR as % of TSA	% of reach in TSA	Explanation for omission
Barnsley Chronicle Ltd	Barnsley Chronicle	N	Y	98422	3.4	100	-
Barnsley Chronicle Ltd	Barnsley Independent	N	N	81331	2.8	100	-
Garnett Dickinson Publishing Ltd	Dearne Valley Weekender	N	N	72098	0.1	100	-
Garnett Dickinson Publishing Ltd	Rotherham Record	N	N	87511	2.5	100	-
Johnston Press	Brighouse Echo	N	Y	14260	2.6	100	-
Johnston Press	Dewsbury Reporter Group	N	Y	92790	3.0	100	-
Johnston Press	Doncaster Advertiser Series	N	N	51714	0.5	100	-
Johnston Press	Dronfield Advertiser	N	N	13387	0.2	100	-
Johnston Press	Hebden Bridge Times	N	Y	6713	3.2	100	-
Johnston Press	Hemsworth & S Elmsall Express	N	Y	16325	1.8	100	-
Johnston Press	Pudsey Times	N	N	26827	3.4	100	-
Johnston Press	Sheffield Weekly Gazette	N	N	154518	0.5	100	-
Johnston Press	South Yorkshire Times	N	Y	10667	1.0	100	-
Johnston Press	Thorne Gazette	N	N	16162	0.0	100	-
Johnston Press	Wakefield Express	N	Y	78978	1.4	100	-
Newsquest Media Group	The Advertiser (Bradford & District)	N	N	73313	0.1	100	-
Trinity Mirror Plc	Huddersfield Daily Examiner	Y	Y	52411	0.2	100	-
Johnston Press	Eckington Leader	N	N	28710	0.6	100	-
Garnett Dickinson Publishing Ltd	Rotherham & South Yorkshire Advertiser	N	Y	73369	4.2	99	-
Johnston Press	Sheffield Star (Incl. Doncaster Star)	Y	Y	142672	4.5	98	-
Johnston Press	Sheffield Telegraph	N	Y	38494	1.8	97	-
Newsquest Media Group	Bradford Telegraph	Y	Y	67115	0.9	97	-
Johnston Press	Pontefract & Castleford Express	N	Y	50632	0.1	96	-
Johnston Press	Doncaster Free Press	N	Y	97521	0.0	94	-
Johnston Press	Leeds - Yorkshire Evening Post	Y	Y	120429	0.0	91	-
Johnston Press	Leeds Weekly News Group	N	N	129825	5.0	90	-
Johnston Press	Halifax Evening Courier	Y	Y	38766	1.3	88	-
Newsquest Media Group	Keighley News	N	Y	22075	5.4	74	-
Johnston Press	Wharfe Valley Times	N	N	26648	0.4	60	-
Johnston Press	Yorkshire Post	Y	Y	66763	0.6	47	-
Newsquest Media Group	Wharfedale & Airedale Observer	N	Y	4191	2.8	42	-
Johnston Press	Worksop Guardian Series	N	Y	7469	0.9	23	Not targeting the TSA
Johnston Press	Retford Trader & Guardian	N	N	3323	0.3	14	Not targeting the TSA
Newsquest Media Group	Craven Herald & Pioneer	N	Y	3060	2.3	9	Not targeting the TSA
Newsquest Media Group	Ilkley Gazette	N	Y	939	2.3	8	Not targeting the TSA
Chronicle Publications	Goole Times	N	Y	1529	0.1	6	Small scale
Johnston Press	Derbyshire Times	N	Y	4714	0.0	4	Not targeting the TSA
Johnston Press	Epworth Bells	N	Y	257	0.0	4	Not targeting the TSA
Johnston Press	Selby Times	N	Y	520	0.8	3	Small scale
Johnston Press	Harrogate Advertiser Group	N	Y	2332	2.6	2	-
Northcliffe Media Ltd	Retford Gainsborough & Worksop Times	N	Y	346	0.2	1	Not targeting the TSA / small scale
Newsquest Media Group	Darlington & Stockton Times	N	Y	203	0.0	0	Not targeting the TSA
Johnston Press	Scotland On Sunday	N	Y	27	1.8	0	Not targeting the TSA

Source: Ofcom analysis; JICREG, April 2012, Real Radio Yorkshire TSA

Notes: Table ranked by % reach within the Real Radio Yorkshire TSA

Fig 55: Share of circulation and number of titles by media owner in the Real Radio Yorkshire TSA

	Share of circulation	Number of titles
Johnston Press	61.9%	28
Garnett Dickinson Publishing Ltd	15.6%	3
Barnsley Chronicle Ltd	10.6%	2
Newsquest Media Group	9.6%	7
Trinity Mirror Plc	2.2%	1
Chronicle Publications	0.1%	1
Northcliffe Media Ltd	0.0%	1

Source: JICREG

3. Television

A1.180 There are two providers of regional television news each available across the whole of the Real Radio Yorkshire TSA: BBC One and ITV1.

A1.181 BARB data shows that the average weekly reach to regional television news in Yorkshire by BBC One and ITV1 combined is 56%⁶⁷.

4. Online

A1.182 There is a range of websites published by the BBC, print media owners and local radio companies. There are three BBC news websites serving this region - Leeds & West Yorkshire, Sheffield & South Yorkshire and York & North Yorkshire— in addition to websites provided by BBC Radio Leeds and BBC Radio Sheffield. The Newspaper Society indicates that 62 local print titles also provide a website. Most commercial or community radio stations also provide a website but these tend to only provide schedule information rather than bespoke regional news content.

A1.183 According to analysis undertaken by Birmingham University⁶⁸ there are 29 additional independent providers of online nations, regional and local news and current affairs content. It is uncertain what level of nations, regional and local news these sites carry. Our understanding is that they are focused on tightly defined local areas and we have seen no evidence to suggest that they have the capacity to influence the democratic debate in Yorkshire.

The following sections relate to cross platform consumption and impact drawing on a range of existing Ofcom surveys.

5. Cross-platform consumption

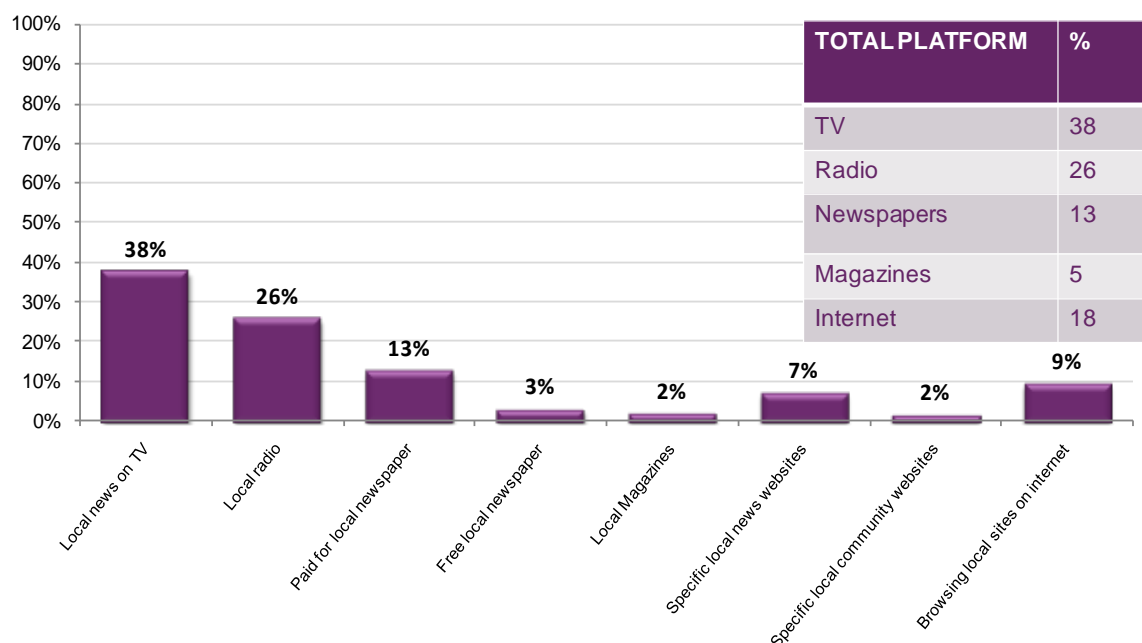
A1.184 According to Ofcom research (2012), when respondents in Yorkshire as a whole were asked about the platforms they use for local media, the results showed that local radio commanded a substantial 'share of references' (26%), ranking second to TV (38%).

⁶⁷ Based on total minutes of viewing of 'News: Regional News' genre. Reach based on 3mins consecutive, full weeks only based on 'News: Regional News' genre. 2011

⁶⁸ A database of hyperlocal websites has been established by Openly Local and analysed by Birmingham City University in May 2012.

A1.185 The research also indicates that 4% of respondents in Yorkshire use only local radio on a weekly basis. However, the same research shows that 48% of respondents use local radio on a weekly basis while on average, respondents use 2.7 local media platforms (from among TV, print, online, radio)⁶⁹. We note, however, that local radio usage indicated through this research is lower than RAJAR estimates as seen in chart 1 which indicates that 59% of people in the Real Radio Yorkshire TSA listen to local radio each week.

Fig 56: Share of References for local media platforms - Yorkshire



Source: Ofcom Local Media Survey 2012⁷⁰
Base: All in Yorkshire, 175

Impact

A1.186 Across the UK, TV is the main source named for local news (53%) followed by print (15%) and then radio (10%)⁷¹.

A1.187 Research undertaken by Ofcom⁷² also provides an overview of the perceived personal importance of each local media platform among users of each platform at a UK-level. The results showed that 59% of viewers scored local news on TV 7 or higher out of 10 in terms of its importance as a local media source. Whereas 44% of listeners scored local radio as important, 43% of readers did so for paid for local print and 29% for free local print. 38% scored 'internet in general' highly on importance, 28% for local news websites, 37% for local community sites, and 27% for local magazines.

⁶⁹ Source: Ofcom research undertaken by Ipsos Mori (May, 2012).

⁷⁰ <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

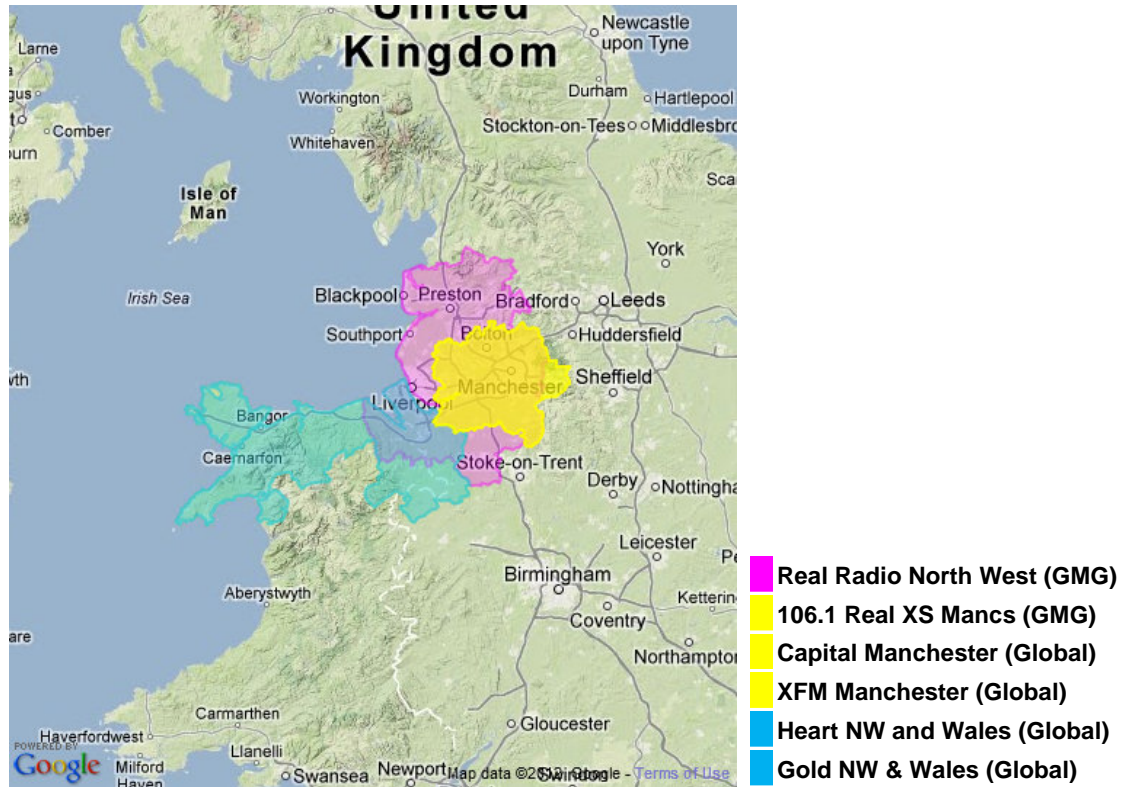
⁷¹ Source: Ofcom's media tracker (2011).

⁷² Source: Ofcom research undertaken by Ipsos Mori (2012).

North West

A1.188 The map below shows the stations that we are considering in our analysis of the areas of interest in the North West and how their TSAs overlap.

Fig 57: Map of North West England showing GMG Radio and Global Radio station TSAs



Source: Radio Advertising Bureau

Area of interest 9: Real Radio North West TSA

A1.189 The map of the North West above illustrates the Global Radio and GMG Radio stations being considered.

A1.190 This section considers the secondary area of interest, the Real Radio North West TSA. This includes the people in the non-overlapping area which was served by the GMG Radio station. It has an estimated population of 5.3m adults. Although the number of media providers in the non-overlap area will not change there will be an effect due to the change in ownership. This area also encompasses the overlap area which will be considered separately in the next section.

Fig 58: GMG Radio/Global Radio TSA population overlap

	TSA population	Overlap population between Global and GMG stations	% of TSA population in overlap area
Real Radio NW TSA (GMG)	5,267,000	2,829,000	54%
Capital Manchester TSA (Global)	2,864,000	2,829,000	99%
XFM Manchester TSA (Global)	2,864,000	2,829,000	99%
Heart NW & Wales TSA (Global)	998,000	557,000	56%

Source: RAJAR Q2 2012, 12 month weight, adults 15+

Availability and consumption

1. Radio

A1.191 The table below lists all of the local radio stations available within the Real Radio NW TSA, including those not measured by RAJAR such as community services. In total, we have identified 44 local radio stations available to some degree across this area. However, we have excluded some of these services from our availability analysis on the basis that they are either small-scale; serve a niche community or do not target the Real Radio NW TSA population.

A1.192 On this basis in the post-merger scenario we conclude there are 18 sources providing local news on radio in this area, with four owners (Global Radio, Bauer, UTV and the BBC).

A1.193 The data is based on the RAJAR Q2 2012 survey of all adults 15+ in the Real Radio NW TSA using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio excluding Smooth Radio and Gold Manchester as stations do not provide local news. We have only considered the local services by each media owner. Figures may also include a small amount of

listening to other local stations provided by a media owner but targeting neighbouring TSAs.

A1.194 The table also shows radio consumption in the Real Radio NW TSA. The figures show that excluding Smooth (which does not provide local news), Capital is the most listened to station with 525,000 listeners, a tenth of the population. Of the listening to local stations providing local news, (using the base of any local commercial station or any BBC local/regional station excluding Smooth or Gold Manchester) BBC Radio Merseyside has the highest share of listening with 14%.

Fig 59: Local radio availability and consumption in the Real Radio NW TSA

Media Owner (post-merger)	Station	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)	% of RRNW TSA	% of TSA within RRNW TSA	Explanation for omission
Global	Real Radio NW	10%	499	8%	100%	100%	-
Global	Smooth Radio NW	16%	857	15%	100%	100%	No local news
Global	Capital Manchester	10%	525	6%	54%	99%	-
Global	XFM Manchester	4%	209	3%	54%	99%	-
Global	Gold Manchester	2%	97	2%	54%	99%	No local news
Global	106.1 Real XS	3%	143	2%	51%	99%	-
Bauer	Key 103	10%	516	7%	46%	99%	-
Bauer	Magic 1152	2%	86	2%	46%	99%	-
BBC	Radio Manchester	5%	243	4%	41%	100%	-
Bauer	Radio City 96.7	9%	460	8%	33%	96%	-
Bauer	Magic 1548	2%	97	2%	33%	96%	-
BBC	Radio Merseyside	7%	361	14%	31%	100%	-
Bauer	City Talk 105.9	-	-	-	30%	100%	-
Bauer	97.4 Rock FM	-	-	-	24%	100%	-
UTV	107.6 Juice FM	-	-	-	19%	100%	-
Bauer	Magic 999	-	-	-	19%	89%	-
BBC	Radio Lancashire	-	-	-	18%	82%	-
Global	Gold NW & Wales	-	-	-	11%	56%	Doesn't target TSA
Global	Heart NW & Wales	-	-	-	11%	56%	Doesn't target TSA
Independent	96.2 The Revolution	-	-	-	10%	100%	Small-scale
UTV	102.4 Wish FM	-	-	-	9%	100%	-
UTV	107.4 Tower FM	-	-	-	8%	100%	-
UTV	107.2 The Wire	-	-	-	5%	100%	-
UTV	Signal 1	-	-	-	4%	29%	Doesn't target TSA
UTV	Signal 2	-	-	-	4%	29%	Doesn't target TSA
Independent	Dee 106.3	-	-	-	4%	100%	Small-scale
Independent	The Bee	-	-	-	3%	100%	Small-scale
Independent	Cheshire's Silk 106.9	-	-	-	3%	100%	Small-scale
Global	Real Radio Wales	-	-	-	3%	5%	Doesn't target TSA
BBC	Radio Wales	-	-	-	3%	5%	Doesn't target TSA
BBC	Radio Stoke	-	-	-	2%	17%	Doesn't target TSA
Community	ALL FM	-	-	-	-	-	Small-scale
Community	Wythenshawe FM	-	-	-	-	-	Small-scale
Community	Crescent Radio	-	-	-	-	-	Small-scale
Community	Oldham Community Radio	-	-	-	-	-	Small-scale
Community	Tameside Radio	-	-	-	-	-	Small-scale
Community	Pure 107.8FM	-	-	-	-	-	Small-scale
Community	Salford City Radio	-	-	-	-	-	Small-scale
Community	Canalside Radio	-	-	-	-	-	Small-scale
Community	96.5 Bolton FM	-	-	-	-	-	Small-scale
Community	Peace FM	-	-	-	-	-	Small-scale
Community	North Manchester FM	-	-	-	-	-	Small-scale
Community	Gaydio	-	-	-	-	-	Small-scale
Community	Unity Radio	-	-	-	-	-	Small-scale

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, Real Radio NW TSA

Notes: Table ranked by % coverage within the Real Radio NW TSA

Weekly reach(000s) is the number of people aged 15+ who listen to a radio station within at least one quarter-hour period over the course of a week

Weekly reach % is the weekly reach expressed as a proportion of the population within the base TSA

Share of local radio is the percentage of local radio listening hours that a station accounts for within the TSA

A1.195 The table below shows the listening figures for the key media owners in the TSA. Post-merger Global Radio has a 25% share of listening to any local radio in the Real Radio NW TSA. Bauer has a 30% share. The combined weekly reach to Global Radio stations is 1.2m, 24% of the adult population. The combined reach to Bauer local stations is 1.4m adults (27%).

Fig 60: Weekly reach and share by media owner (pre and post merger) in the Real Radio NW TSA

	Media owner	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)
Pre-merger*	Global	15%	763	13%
	GMG	12%	611	12%
Post-merger*	Global	24%	1,239	25%
	Bauer	27%	1,402	30%
	BBC	18%	932	28%

Source: RAJAR Q2 2012, 12 month weight, Real Radio NW TSA

*Excludes any contribution from Smooth Radio NW or Gold Manchester as these stations provide[†] no local news

2. Print

A1.196 The tables below show the availability of local print media in the Real Radio NW TSA. In total, we have identified 89 local print media titles available to some degree across this area. There are 37 free titles and 52 paid for titles, and 13 daily and 76 weekly titles available across the TSA.

A1.197 However, we have excluded some titles from our analysis on the basis that they are not targeting the Real Radio Wales (N) TSA population or are small-scale.

A1.198 On this basis we conclude there are 75 retail providers of local news in print media in this area (detailed in the 'Title' column e.g. Accrington Observer) with seven wholesale providers (Trinity Mirror Plc, Champion Newspapers, Hirst Kidd & Rennie, Johnston Press, Newsquest Media Group, NWN Media, Heads (Congleton)).

A1.199 Trinity Mirror has both the largest share of circulation in the North West (45.9%) and the largest number of titles available (36). With 21 titles, Newsquest accounts for the next largest share at 27.7%. There are five groups which have only one or two titles available in this area and each account for a share of circulation of less than 1%. The most read title is the Manchester Evening News (MEN), which reaches 7.0% of the population. It should be noted that JICREG classifies the Mon-Wed and Sat editions of the MEN separately from the Thursday-Friday edition and it is the Thursday-Friday edition which is most widely read.

Fig 61: Local print title availability and consumption in the Real Radio NW TSA

Media Owner	Title	Daily?	Paid?	Reach	Reach as % of TSA	% of reach in TSA	Explanation for omission
Trinity Mirror Plc	Accrington Observer	N	Y	27721	1	100	-
Champion Newspapers	Champion Series	N	N	232409	4	100	-
Hirst Kidd & Rennie	Oldham Evening Chronicle	Y	Y	34981	1	100	-
Johnston Press	Blackpool Reporter	N	N	40023	1	100	-
Johnston Press	Chorley & Leyland Guardian	N	Y	37030	1	100	-
Johnston Press	Leigh Reporter	N	N	64742	1	100	-
Johnston Press	Lytham St Annes Express	N	Y	19791	0	100	-
Johnston Press	Preston & Leyland Reporter	N	N	46943	1	100	-
Johnston Press	St Helens Reporter	N	N	110033	2	100	-
Johnston Press	The Courier Group - Garstang & Longridge	N	Y	21273	0	100	-
Johnston Press	Wigan Observer	N	Y	39888	1	100	-
Johnston Press	Wigan Reporter	N	N	61665	1	100	-
Newsquest Media Group	Blackburn Citizen Series	N	N	39834	1	100	-
Newsquest Media Group	Bolton News	Y	Y	52109	1	100	-
Newsquest Media Group	Bury Journal	N	N	41250	1	100	-
Newsquest Media Group	Bury Times	N	Y	46689	1	100	-
Newsquest Media Group	Chorley Citizen	N	N	32557	1	100	-
Newsquest Media Group	Crewe & Nantwich Guardian Series	N	N	45977	1	100	-
Newsquest Media Group	Knutsford Guardian	N	Y	12457	0	100	-
Newsquest Media Group	Leigh Journal	N	N	75326	1	100	-
Newsquest Media Group	Northwich Guardian Group	N	Y	43848	1	100	-
Newsquest Media Group	Prestwich & Whitefield Guide	N	Y	4910	0	100	-
Newsquest Media Group	Runcorn & Widnes World Group	N	N	49478	1	100	-
Newsquest Media Group	Sale & Altrincham Messenger	N	N	63408	1	100	-
Newsquest Media Group	St Helens Star	N	N	103679	2	100	-
Newsquest Media Group	Stretford & Urmston Messenger	N	N	33198	1	100	-
Newsquest Media Group	Warrington Guardian	N	Y	73003	1	100	-
Newsquest Media Group	Warrington Midweek	N	N	66786	1	100	-
Newsquest Media Group	Wirral Globe	N	N	156587	3	100	-
NWN Media	Chester & District Standard	N	N	75560	1	100	-
NWN Media	Ellesmere Port Standard	N	N	37700	1	100	-
NWN Media	Flintshire Standard	N	N	31317	1	100	-
Trinity Mirror Plc	Chronicle Xtra - Chester	N	N	65073	1	100	-
Trinity Mirror Plc	Chronicle Xtra South Cheshire	N	N	25037	0	100	-
Trinity Mirror Plc	Crewe Chronicle	N	Y	45250	1	100	-
Trinity Mirror Plc	Crosby Herald	N	Y	20916	0	100	-
Trinity Mirror Plc	Ellesmere Port Pioneer	N	Y	18883	0	100	-
Trinity Mirror Plc	Formby Times	N	N	15612	0	100	-
Trinity Mirror Plc	Heywood Advertiser	N	Y	11499	0	100	-
Trinity Mirror Plc	Liverpool Echo	Y	Y	256944	5	100	-
Trinity Mirror Plc	Liverpool Post	N	Y	24321	0	100	-
Trinity Mirror Plc	Macclesfield Express	N	Y	29681	1	100	-
Trinity Mirror Plc	Middleton & North Manchester Guardian	N	Y	14247	0	100	-
Trinity Mirror Plc	Oldham Advertiser	N	Y	102504	2	100	-
Trinity Mirror Plc	Ormskirk Advertiser Series	N	Y	25420	0	100	-
Trinity Mirror Plc	Rochdale Observer (Sat)	N	Y	43870	1	100	-
Trinity Mirror Plc	Runcorn & Widnes Weekly News	N	Y	34411	1	100	-
Trinity Mirror Plc	Sale & Altrincham Advertiser	N	N	68729	1	100	-
Trinity Mirror Plc	South Manchester Reporter	N	N	67198	1	100	-
Trinity Mirror Plc	Southport Midweek Visitor	N	N	77193	1	100	-
Trinity Mirror Plc	Southport Visitor	N	Y	43270	1	100	-
Trinity Mirror Plc	Stockport Express	N	Y	30158	1	100	-
Trinity Mirror Plc	Stockport Times Group	N	N	115432	2	100	-
Trinity Mirror Plc	Stretford & Urmston Advertiser	N	N	40089	1	100	-
Trinity Mirror Plc	Wilmslow Express	N	N	19257	0	100	-
Trinity Mirror Plc	Wirral News Group	N	N	164169	3	100	-
Newsquest Media Group	Bolton Journal	N	N	57083	1	100	-
Trinity Mirror Plc	Salford Advertiser	N	N	102639	2	100	-
Johnston Press	The Gazette - Blackpool	Y	Y	65123	1	100	-
Johnston Press	Wigan Evening Post	Y	Y	16919	0	100	-
Trinity Mirror Plc	Manchester Evening News (Mon-Wed & Sat)	Y	Y	163502	3	99	-
Trinity Mirror Plc	Manchester Evening News (Thu-Fri)	Y	N	367457	7	99	-
Johnston Press	Clitheroe Advertiser & Times	N	Y	18972	0	99	-
Trinity Mirror Plc	Rochdale Observer (Wed)	N	Y	27386	1	99	-
Johnston Press	Lancashire Evening Post	Y	Y	89865	2	98	-
Trinity Mirror Plc	Chester Chronicle	N	Y	63600	1	98	-
Newsquest Media Group	Lancashire Telegraph	Y	Y	54475	1	94	-
Johnston Press	Burnley Express (Fri)	N	Y	44344	1	92	-
Johnston Press	Burnley Express (Tue)	N	Y	31301	1	88	-
Trinity Mirror Plc	Tameside & Glossop Advertiser Group	N	N	105973	2	87	-
Trinity Mirror Plc	Rossendale Free Press	N	Y	22017	0	75	-
Heads (Congleton)	Congleton Chronicle Series	N	Y	32596	1	74	-
Newsquest Media Group	Burnley Citizen Series	N	N	33184	1	62	-
NWN Media	The Leader - Wrexham & Chester	Y	Y	22590	0	58	-
NWN Media	Wrexham Leader	N	N	13481	0	29	-
Trinity Mirror Plc	Daily Post - Wales	Y	Y	21815	0	20	Not targetting the TSA
Johnston Press	Nelson Leader Series	N	Y	3307	0	9	Not targetting the TSA
Johnston Press	Lancaster Guardian Series	N	Y	1383	0	3	Not targetting the TSA
Heads (Congleton)	Moorlands Mercury	N	N	603	0	3	Small scale within TSA
Newsquest Media Group	Craven Herald & Pioneer	N	Y	741	0	2	Small scale within TSA
Northcliffe Media Ltd	Stoke The Sentinel	Y	Y	2561	0	2	Not targetting the TSA
Johnston Press	The Visitor - Morecambe	N	Y	355	0	1	Small scale within TSA
Trinity Mirror Plc	Wales On Sunday	N	Y	823	0	1	Not targetting the TSA
Johnston Press	Buxton Advertiser	N	Y	180	0	1	Not targetting the TSA
Trinity Mirror Plc	Wales - Western Mail	Y	Y	477	0	1	Not targetting the TSA
Iliffe News & Media	Leek Post & Times	N	Y	94	0	0	Not targetting the TSA
C N Group	Whitehaven News	N	Y	6	0	0	Small scale within TSA
Trinity Mirror Plc	Sunday Mercury - Birmingham	N	Y	18	0	0	Not targetting the TSA
Johnston Press	Scotland On Sunday	N	Y	4	0	0	Not targetting the TSA

Source: Ofcom analysis; JICREG, April 2012, Real Radio NW TSA

Notes: Table ranked by % reach within the Real Radio NWTSA

Fig 62: Share of circulation and number of titles by media owner in the Real Radio NW TSA

	Share of circulation	Number of titles
Trinity Mirror Plc	45.9%	36
Newsquest Media Group	27.7%	21
Johnston Press	14.5%	20
Champion Newspapers	5.9%	1
NWN Media	4.9%	5
Hirst Kidd & Rennie	0.6%	1
Heads (Congleton)	0.5%	2
C N Group	0.0%	1
Iliffe News & Media	0.0%	1
Northcliffe Media Ltd	0.0%	1

Source: JICREG

3. Television

A1.200 There are two providers of regional television news each available across the whole of the Real Radio NW TSA: BBC One and ITV1.

A1.201 BARB data shows that the average weekly reach to regional television news in the North West by BBC One and ITV1 combined is 56%⁷³.

4. Online

A1.202 There is a range of websites published by the BBC, print media owners and local radio companies. There are two BBC news websites serving the North West of England - Cumbria, Lancashire, Liverpool and Manchester – in addition to websites provided by BBC Radio Manchester, BBC Radio Lancashire and BBC Radio Merseyside. The Newspaper Society indicates that 62 local print titles also provide a website. Most commercial or community radio stations also provide a website but these tend to provide only schedule information rather than bespoke regional news content.

A1.203 According to analysis undertaken by Birmingham University⁷⁴ there are 32 additional independent providers of online nations, regional and local news and current affairs content. It is uncertain what level of nations, regional and local news these sites carry. Our understanding is that they are focused on tightly defined local areas and we have seen no evidence to suggest that they have the capacity to influence the democratic debate in this region.

The following sections relate to cross platform consumption and impact drawing on a range of existing Ofcom surveys.

⁷³ Based on total minutes of viewing of 'News: Regional News' genre. Reach based on 3mins consecutive, full weeks only based on 'News: Regional News' genre. 2011

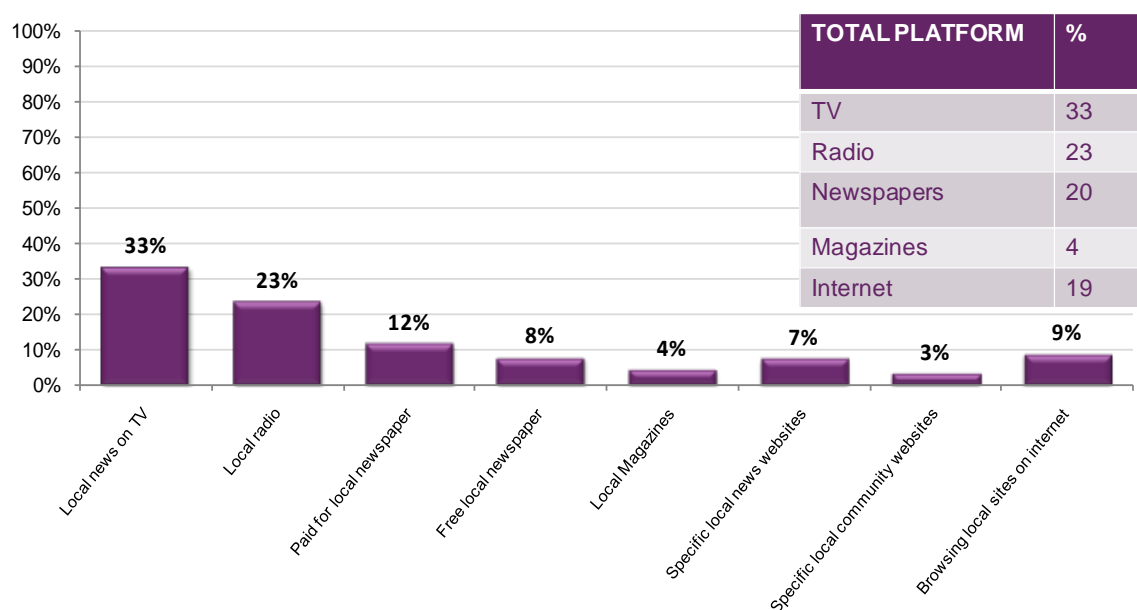
⁷⁴ A database of hyperlocal websites has been established by Openly Local and analysed by Birmingham City University in May 2012.

5. Cross-platform consumption

A1.204 According to Ofcom research (2012), when respondents in the North West as a whole were asked about the platforms they use for local media, the results showed that local radio commanded a substantial 'share of references' (23%), ranking second to TV (33%).

A1.205 The research also indicates that 2% of respondents in the North West use only local radio on a weekly basis. However, the same research shows that 48% of respondents use local radio on a weekly basis while on average, respondents use 3 local media platforms (from among TV, print, online, radio)⁷⁵.

Fig 63: Share of References for local media platforms – North West



Source: Ofcom Local Media Survey 2012⁷⁶

Impact

A1.206 Across the UK, TV is the main source named for local news (53%) followed by print (15%) and then radio (10%)⁷⁷.

A1.207 Research undertaken by Ofcom⁷⁸ also provides an overview of the perceived personal importance of each local media platform among users of each platform at a UK-level. The results showed that 59% of viewers scored local news on TV 7 or higher out of 10 in terms of its importance as a local media source. Whereas 44% of listeners scored local radio as important, 43% of readers did so for paid for local print and 29% for free local print. 38% scored 'internet in general' highly on importance, 28% for local news websites, 37% for local community sites, and 27% for local magazines.

⁷⁵ Source: Ofcom research undertaken by Ipsos Mori (May, 2012).

⁷⁶ <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

⁷⁷ Source: Ofcom's media tracker (2011).

⁷⁸ Source: Ofcom research undertaken by Ipsos Mori (2012).

Area of interest 10: 106.1 Real XS (Manchester) TSA

A1.208 The map of the North West above illustrates the Global Radio and GMG Radio stations being considered.

A1.209 The primary area of interest in the North West is the overlap between the GMG Radio and Global Radio stations within the 106.1 Real XS TSA, It has an estimated population of 2.7m adults⁷⁹.

Fig 64: GMG Radio/Global Radio TSA population overlap

	TSA population	Overlap population between Global and GMG stations	% of TSA population in overlap area
96.3 Real XS TSA (GMG)	2,722,000	2,722,000	100%
Capital Manchester TSA (Global)	2,864,000	2,722,000	95%
XFM Manchester TSA (Global)	2,864,000	2,722,000	95%

Source: RAJAR Q2 2012, 12 month weight, adults 15+

Availability and consumption

1. Radio

A1.210 The table below lists all of the local radio stations available within the 106.1 Real XS TSA, including those not measured by RAJAR such as community services. In total, we have identified 37 local radio stations available to some degree across this area. However, we have excluded some of these services from our availability analysis on the basis that they are either small-scale; serve a niche community, do not provide local news or do not target the 106.1 Real XS TSA population.

A1.211 On this basis in the post-merger scenario we conclude there are 10 sources providing local news on radio in this area (106.1 Real XS, Real Radio, Capital Radio, XFM, Key 103, Magic 1152, Tower FM, The Wire, Wish FM, BBC Manchester)⁸⁰, with four owners (Global Radio, Bauer, UTV and the BBC).

A1.212 The data is based on the RAJAR Q2 2012 survey of all adults 15+ in the 106.1 Real XS TSA using a 12 month weight. Share is based on total hours to any local commercial radio and any BBC local/regional radio excluding Smooth Radio and Gold Manchester as stations do not provide local news. We have only considered the local services by each media owner. Figures may also include a small amount of listening to other local stations provided by a media owner but targeting neighbouring TSAs.

⁷⁹ Source: RAJAR Q2 2012, 12 month weighting, adults 15+

⁸⁰ **Erratum:** the number '11' has been changed to '10' and list of station names has been amended to reflect the stations included in Fig 65, and the number of media owners has been changed from 'three' to 'four' to reflect the number of media owners listed, ie Global Radio, Bauer, UTV and the BBC.

A1.213 The table also shows radio consumption in the 106.1 Real XS TSA. The figures show that Capital is the most listened to station with 516,000 listeners, 19% of the population. Of the listening to local stations providing local news, (using the base of any local commercial station or any BBC local/regional station excluding Smooth or Gold Manchester) Key 103 has the highest share of listening with 17%.

Fig 65: Local radio availability and consumption in the 106.1 Real XS TSA⁸¹

Media Owner (post-merger)	Station	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)	% of Real XS TSA	% of TSA within Real XS TSA	Explanation for omission
Global	106.1 Real XS	5%	146	5%	100%	100%	-
Global	Capital Manchester	19%	516	15%	100%	95%	-
Global	XFM Manchester	8%	203	6%	100%	95%	-
Global	Gold Manchester	4%	96	4%	100%	95%	No local news
Global	Real Radio NW	9%	230	8%	99%	51%	-
Global	Smooth Radio NW	16%	443	16%	99%	51%	No local news
Bauer	Key 103	19%	515	17%	89%	99%	-
Bauer	Magic 1152	3%	86	4%	89%	99%	-
BBC	Radio Manchester	9%	235	8%	78%	98%	-
Independent	96.2 The Revolution	-	-	-	19%	100%	Small-scale
UTV	107.4 Tower FM	-	-	-	16%	98%	-
BBC	Radio Merseyside	-	-	-	14%	23%	Doesn't target TSA
Bauer	Radio City 96.7	-	-	-	13%	19%	Doesn't target TSA
Bauer	Magic 1548	-	-	-	13%	19%	Doesn't target TSA
Bauer	City Talk 105.9	-	-	-	13%	22%	Doesn't target TSA
UTV	102.4 Wish FM	-	-	-	13%	74%	-
Bauer	97.4 Rock FM	-	-	-	11%	23%	Doesn't target TSA
UTV	107.2 The Wire	-	-	-	9%	92%	-
Independent	Cheshire's Silk 106.9	-	-	-	5%	72%	Small-scale
Bauer	Magic 999	-	-	-	3%	7%	Doesn't target TSA
BBC	Radio Lancashire	-	-	-	1%	3%	Doesn't target TSA
UTV	Signal 1	-	-	-	1%	4%	Doesn't target TSA
UTV	Signal 2	-	-	-	1%	4%	Doesn't target TSA
UTV	107.6 Juice FM	-	-	-	1%	2%	Doesn't target TSA
Community	ALL FM	-	-	-	-	-	Small-scale
Community	Wythenshawe FM	-	-	-	-	-	Small-scale
Community	Crescent Radio	-	-	-	-	-	Small-scale
Community	Oldham Community Radio	-	-	-	-	-	Small-scale
Community	Tameside Radio	-	-	-	-	-	Small-scale
Community	Pure 107.8FM	-	-	-	-	-	Small-scale
Community	Salford City Radio	-	-	-	-	-	Small-scale
Community	Canalside Radio	-	-	-	-	-	Small-scale
Community	96.5 Bolton FM	-	-	-	-	-	Small-scale
Community	Peace FM	-	-	-	-	-	Small-scale
Community	North Manchester FM	-	-	-	-	-	Small-scale
Community	Gaydio	-	-	-	-	-	Small-scale
Community	Unity Radio	-	-	-	-	-	Small-scale

Source: Ofcom analysis; RAJAR Q2 2012, 12 month weight, 106.1 Real XS TSA

Notes: Table ranked by % coverage within the 106.1 Real XS TSA

Weekly reach(000s) is the number of people aged 15+ who listen to a radio station within at least one quarter-hour period over the course of a week

Weekly reach % is the weekly reach expressed as a proportion of the population within the base TSA

Share of local radio is the percentage of local radio listening hours that a station accounts for within the TSA

A1.214 The table below shows the listening figures for the key media owners in the TSA. Post-merger Global Radio has a 43% share of listening to any local radio in the 106.1 Real XS TSA. Bauer has a 30% share. The combined weekly reach to Global Radio stations is 894,000, 32% of the adult population. The combined reach to Bauer local stations is 668,000 adults (25%).

⁸¹ **Addendum:** 'Small-scale' has been added to the 'Explanation for omission' column for 96.2 The Revolution.

Fig 66: Weekly reach and share by media owner (pre and post merger) in the 106.1 Real XS TSA

	Media owner	Weekly reach (%)	Weekly reach (000s)	Share of local radio (%)
Pre-merger*	Global	24%	646	26%
	GMG	13%	344	17%
Post-merger*	Global	32%	894	43%
	Bauer	25%	668	30%
	BBC	12%	336	17%

Source: RAJAR Q2 2012, 12 month weight, 106.1 Real XS TSA

*Excludes any contribution from Smooth Radio NW or Gold Manchester as these stations provides no local news

2. Print

A1.215 The tables below show the availability of local print media in the 106.1 Real XS TSA. In total, we have identified 34 local print media titles available to some degree across this area. There are 16 free titles and 18 paid for titles, and 5 daily and 29 weekly titles available across the TSA.

A1.216 However, we have excluded some titles from our analysis on the basis that they are not targeting the 106.1 Real XS TSA population or are small-scale.

A1.217 On this basis we conclude there are 30 retail providers of local news in print media in this area (detailed in the 'Title' column e.g. Bury Journal) with four wholesale providers (Trinity Mirror Plc, Hirst Kidd & Rennie, Johnston Press, Newsquest Media Group).

A1.218 Trinity Mirror's 17 titles account for more than two thirds (69.5%) of the share of circulation in this TSA. Newsquest are the only other publisher with a significant share, accounting for 27.0% of circulation over 12 titles. The remaining share (of less than 3.5%) is taken by three groups, with a combined five titles between them. The most read title is the Manchester Evening News (MEN), which reaches 15.6% of the population. It should be noted that JICREG classifies the Mon-Wed and Sat editions of the MEN separately from the Thursday-Friday edition and it is the Thursday-Friday edition which is most widely read.

Fig 67: Local print title availability and consumption in the 106.1 Real XS TSA

Media Owner	Title	Daily?	Paid?	Reach	Reach as % of TSA	% of reach in TSA	Explanation for omission
Newsquest Media Group	Bury Journal	N	N	41,250	2	100%	-
Newsquest Media Group	Bury Times	N	Y	46,689	2	100%	-
Trinity Mirror Plc	Heywood Advertiser	N	Y	11,499	1	100%	-
Trinity Mirror Plc	Macclesfield Express	N	Y	29,681	1	100%	-
Trinity Mirror Plc	Middleton & North Manchester Guardian	N	Y	14,247	1	100%	-
Trinity Mirror Plc	Oldham Advertiser	N	N	102,504	4	100%	-
Hirst Kidd & Rennie	Oldham Evening Chronicle	Y	Y	34,981	2	100%	-
Newsquest Media Group	Prestwich & Whitefield Guide	N	Y	4,910	0	100%	-
Trinity Mirror Plc	Rochdale Observer (Sat)	N	Y	43,870	2	100%	-
Trinity Mirror Plc	Sale & Altrincham Advertiser	N	N	68,729	3	100%	-
Newsquest Media Group	Sale & Altrincham Messenger	N	N	63,408	3	100%	-
Trinity Mirror Plc	Salford Advertiser	N	N	102,639	5	100%	-
Trinity Mirror Plc	South Manchester Reporter	N	N	67,198	3	100%	-
Trinity Mirror Plc	Stockport Express	N	Y	30,158	1	100%	-
Trinity Mirror Plc	Stockport Times Group	N	N	115,432	5	100%	-
Trinity Mirror Plc	Stretford & Urmston Advertiser	N	N	40,089	2	100%	-
Newsquest Media Group	Stretford & Urmston Messenger	N	N	33,198	1	100%	-
Trinity Mirror Plc	Tameside & Glossop Advertiser Group	N	N	121,315	5	100%	-
Newsquest Media Group	Warrington Guardian	N	Y	73,003	3	100%	-
Newsquest Media Group	Warrington Midweek	N	N	66,786	3	100%	-
Trinity Mirror Plc	Wilmslow Express	N	N	19,257	1	100%	-
Trinity Mirror Plc	Rochdale Observer (Wed)	N	Y	27,386	1	99%	-
Trinity Mirror Plc	MANCHESTER EVENING NEWS (MON-WED & SAT)	Y	Y	161,750	7	98%	-
Trinity Mirror Plc	MANCHESTER EVENING NEWS (THU-FRI)	Y	Y	354,982	16	96%	-
Newsquest Media Group	Bolton News	Y	Y	48,205	2	93%	-
Newsquest Media Group	Bolton Journal	N	N	49,203	2	86%	-
Newsquest Media Group	Knutsford Guardian	N	Y	10,546	0	85%	-
Johnston Press	Leigh Reporter	N	N	27,166	1	42%	-
Newsquest Media Group	Northwich Guardian Group	N	Y	15,627	1	36%	-
Newsquest Media Group	Leigh Journal	N	N	25,793	1	34%	-
Johnston Press	Buxton Advertiser	N	Y	2,139	0	8%	Not targetting TSA
Trinity Mirror Plc	Rossendale Free Press	N	Y	1,127	0	4%	Small scale within the TSA
Johnston Press	Wigan Evening Post	Y	Y	619	0	4%	Not targetting TSA
Heads (Congleton)	Moorlands Mercury	N	N	452	0	2%	Small scale within the TSA

Source: Ofcom analysis; JICREG, April 2012, 106.1 Real XS TSA

Notes: Table ranked by % reach within the 106.1 Real XS TSA

Fig 68: Share of circulation and number of titles by media owner in the 106.1 Real XS TSA

	Share of circulation	Number of titles
Trinity Mirror Plc	69.5%	17
Newsquest Media Group	27.0%	12
Johnston Press	2.0%	3
Hirst Kidd & Rennie	1.4%	1
Heads (Congleton)	0.0%	1

Source: JICREG

3. Television

A1.219 There are two providers of regional television news each available across the whole of the 106.1 Real XS TSA: BBC One and ITV1.

A1.220 BARB data shows that the average weekly reach to regional television news in the North West by BBC One and ITV1 combined is 56%⁸².

4. Online

A1.221 There is a range of websites published by the BBC, print media owners and local radio companies. There is one BBC news website serving Manchester - Manchester – in addition to websites provided by BBC Radio Manchester. The Newspaper Society indicates that 20 local print titles also provide a website. Most commercial or community radio stations also provide a website but these tend to only provide schedule information rather than bespoke regional news content.

A1.222 According to analysis undertaken by Birmingham University⁸³ there are 32 additional independent providers of online news, regional and local news and current affairs content. It is uncertain what level of news, regional and local news these sites carry. Our understanding is that they are focused on tightly defined local areas and we have seen no evidence to suggest that they have the capacity to influence the democratic debate in this region.

The following sections relate to cross platform consumption and impact draw on a range of existing Ofcom surveys.

5. Cross-platform consumption

A1.223 According to Ofcom research (2012), when respondents in the North West as a whole were asked about the platforms they use for local media, the results showed that local radio commanded a substantial 'share of references' (23%), ranking second to TV (33 %).

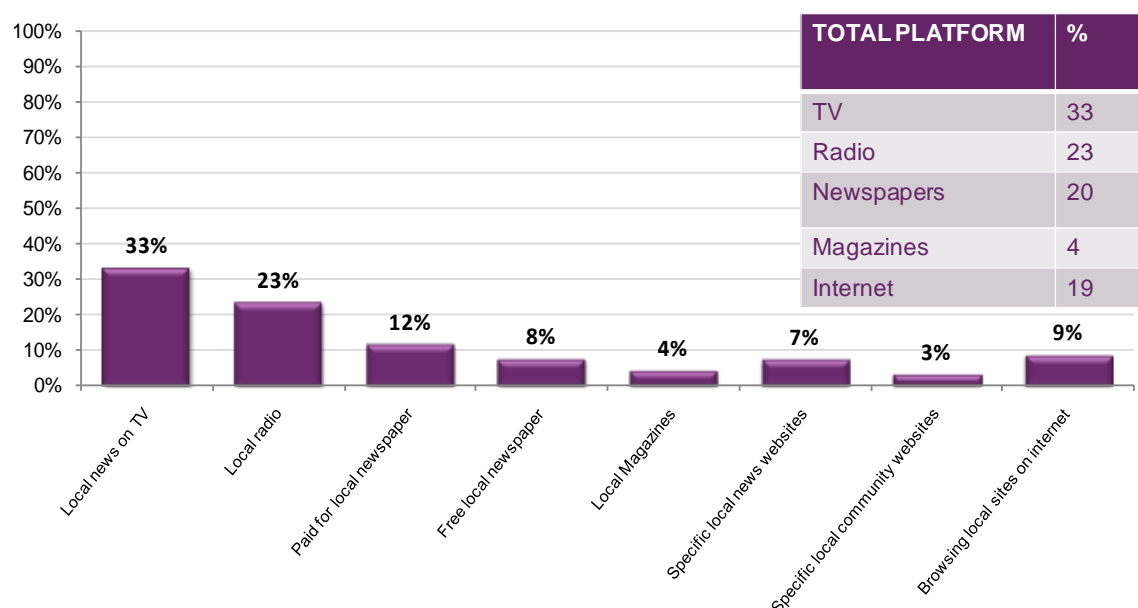
A1.224 The research also indicates that 2% of respondents in the North West use only local radio on a weekly basis. However, the same research shows that 48% of respondents use local radio on a weekly basis while on average, respondents use 3 local media platforms (from among TV, print, online, radio)⁸⁴.

⁸² Based on total minutes of viewing of 'News: Regional News' genre. Reach based on 3mins consecutive, full weeks only based on 'News: Regional News' genre. 2011

⁸³ A database of hyperlocal websites has been established by Openly Local and analysed by Birmingham City University in May 2012.

⁸⁴ Source: Ofcom research undertaken by Ipsos Mori (May, 2012).

Fig 69: Share of References for local media platforms – North West



Source: Ofcom Local Media Survey 2012⁸⁵
Base: All in North West (263)

Impact

A1.225 Across the UK, TV is the main source named for local news (53%) followed by print (15%) and then radio (10%)⁸⁶.

A1.226 Research undertaken by Ofcom⁸⁷ also provides an overview of the perceived personal importance of each local media platform among users of each platform at a UK-level. The results showed that 59% of viewers scored local news on TV 7 or higher out of 10 in terms of its importance as a local media source. Whereas 44% of listeners scored local radio as important, 43% of readers did so for paid for local print and 29% for free local print. 38% scored 'internet in general' highly on importance, 28% for local news websites, 37% for local community sites, and 27% for local magazines.

⁸⁵ <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

⁸⁶ Source: Ofcom's media tracker (2011).

⁸⁷ Source: Ofcom research undertaken by Ipsos Mori (2012).

Glossary

RAJAR: Radio Joint Audience Research is jointly owned by the BBC (British Broadcasting Corporation) and by the RadioCentre (the trade body representing the vast majority of Commercial Radio stations in the UK). It is responsible for operating a single audience measurement system

Share of all radio: The percentage of all radio listening hours that a station accounts for within an area. This is obtained by dividing the station's total hours by the All Radio total hours in the station's TSA.

Share of all local radio: The percentage of local radio listening hours (excluding listening to Gold stations in England, Smooth Radio stations in England and Kiss stations) that a station accounts for within an area.

TSA: Total Survey Area - the area within which a station's audience is measured. This is defined by the station using postcode districts as building blocks.

Weekly reach: The number of people aged 15+ who tune to a radio station within at least 1 quarter-hour period over the course of a week. Respondents are instructed to fill in a quarter-hour only if they have listened to the station for at least 5 minutes within that quarter-hour. Between 24.00-06.00, listening is recorded in half-hour periods.

BARB: Broadcasters' Audience Research Board, the organisation responsible for providing the official measurement of UK television audiences.

JICREG: Joint Industry Committee for REGional press research

Data sources used

Radio listening – RAJAR

For radio listening we have used the RAJAR industry currency (Radio Joint Industry Research). RAJAR interviews approximately 103,000 adults aged 15+ over 50 weeks per year. The survey operates as a sweep, not a panel, which means that respondents only participate for one week. Respondents are asked to complete a one week diary showing all the stations they listened to, for at least 5 minutes, recorded in quarter hour time blocks. Data is compiled and released on a quarterly basis.

The area within which a station's audience is measured is known as the Total Survey Area (TSA) and is defined by the station using postcode districts as building blocks.

As listening is recorded in quarter hour time blocks and RAJAR does not provide programme level detail or programme genres we have been unable to measure listening to news bulletins on radio. Instead, we have used listening to radio *overall* and analysed radio consumption by commercial stations or groups versus BBC services.

Share of all radio is calculated as a percentage of all radio listening hours that a station accounts for within an area. This is obtained by dividing the station's total hours by the All Radio total hours in the station's TSA. We have based our analysis on the share of all local radio which we defined as the percentage of local radio listening hours (excluding listening to Gold stations in England, Smooth Radio stations in England) that a station accounts for within an area.

Television viewing - BARB

For television viewing, we have used the BARB industry currency (Broadcaster Audience Research Board). BARB uses a continuous panel of 5,100 UK homes and tracks television viewing among all people aged 4+ in these homes on a second by second basis using a metering system.

BARB viewing data can be analysed by programme genre. Programmes are categorised by the broadcasters and can be a useful way of analysing viewing. However, the genre classifications are provided on a voluntary basis by broadcasters, and there is no independent verification of them.

In this report, analysis has been conducted on viewers aged 16+. Reach (that is the proportion of the population who have consumed a defined number of minutes of national/international news in a given period) is based on anyone who has watched at least 3 consecutive minutes in an average week; industry practice is generally 3+ or 5+ minutes. Ofcom decided to run the TV news analysis on 3+ minutes due to the varying duration of news programmes (e.g. short news bulletins, hour long programmes or 24 hour channels).

The "News and weather" genre contains four subgenres – "national/international news", "weather", "regional news" and "miscellaneous". Reach figures provided in this report are based on viewing to the subgenre of "regional news".

Print media – JICREG

For local newspaper readership and circulation, we have used The Joint Industry Committee for Regional Media Research (JICREG) data. JICREG is a research based currency for local and regional press titles which is used by advertisers, agencies, regional press publishers and sales houses.

JICREG newspaper readership data are generated by applying readers per copy (RPC) figures to circulation breakdowns at postcode sector level. The RPC figures are generated from readership research, undertaken to strict JICREG guidelines, or by using JICREG models. The models are developed from commissioning titles' research. JICREG data are released twice a year, in April and October.

JICREG data can be analysed by geographic region, including the TSA of commercial radio stations. Share of circulation for media owners has been calculated from the total circulation of all titles available within a TSA.

Existing Ofcom Research

1. **Local Media Omnibus** (Ipsos-MORI, 18th- 31st May 2012, 2,452 UK adults)

Questions placed on the omnibus to understand:

- Local media usage
- Importance of local media
- Single most important source of local media
- Satisfaction of local media regarding its provision of the types of news and information people want

Share of References was derived from this research. Consumers were asked which local media platforms they used and how frequently. Each response was then summed and each platforms' share of consumption calculated from the total responses. Responses have been weighted for frequency, so a platform that is used more than once a day carries more weight than one which is used on a weekly basis.

The survey focused on consumption of local media and was not news specific in relation to radio. Radio listening is therefore for all local radio listening, regardless of content or provider.

Data tables: <http://stakeholders.ofcom.org.uk/binaries/research/research-publications/LMTables.pdf>

2. **Cross media news research** (Kantar 2012)

Research commissioned by Ofcom to inform the process for measuring media plurality.

A quantitative face-to-face survey of 2,379 respondents in February/March 2012. This involved a 30 minute face-to-face survey with a representative UK sample. Interviews in the devolved nations were boosted to allow sufficient base sizes for analysis. The core purpose of this phase of the research was to quantify use of, and attitudes towards, news among people in the UK.

The survey also investigated the possibility of measuring the impact of news on people's opinions.

Published research report:

<http://stakeholders.ofcom.org.uk/binaries/consultations/measuring-plurality/statement/Annex5.pdf>

3. **Media Tracker** (2011)

The Ofcom Media Tracker Survey looks at the media penetration and usage habits of adults in the United Kingdom, as well as their attitudes across a range of media related issues. Issues examined include consumers' attitudes towards programming standards, the amount of advertising shown on TV, and the impartiality of various news media. The tracker runs twice per annum, in April and October and results are combined for publication.

Fieldwork for the Media Tracker study was conducted for Ofcom by the research agency BDRC Continental. It employed face-to-face interviews conducted in respondents' homes. The questionnaire was conducted in two waves (April and October) to counter seasonality issues. Over both halves of fieldwork a sample of 1,700 adults aged 16+ was interviewed and then weighted to be representative of the UK. The data presented here are based on the weighted sample.

Published report: <http://stakeholders.ofcom.org.uk/binaries/research/tv-research/UK-Audience-attitudes.pdf>

Online - Hyperlocal

We have also taken account of hyperlocal website data provided by Openly local/Birmingham City University and previously published in Ofcom's Communication Market Report 2012.