Annex A.3
Lost Opportunities survey: results by region
All regions results
Q1: Can you tell me approximately what your total advertising spend was in 2011? (All regions)

![Bar Chart]

Base: 488 respondents.
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? [multiple responses allowed, prompted question] (All regions)

Base: 488 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? [single response] (All regions)

Base: All respondents identified as using each media format in the last year. Cinema excluded due to low sample size.
Q4: And what other types of media did you consider using in addition to those that you have told me about? [multiple responses, prompted answer. Respondents allowed to not choose any options] (All regions)

Base: 488 respondents. “Actually used” media figures are based on Q2 responses.
Q5: [If Radio not chosen in Question 2] Have you advertised on radio at all in the last three years? (All regions)

Used radio in 2011 (Question 2): 52%
Used radio in 2009 or 2010, but not 2011: 14%
Not used radio in last 3 years: 34%

Base: 488 respondents. Two respondents responded with "Don't know", which is categorised as "Not used radio in last 3 years".
Q6: [If radio=yes at Question 2 or 5] What are your campaign objectives in using radio? [multiple responses allowed, prompted question] (All regions)

- To promote general brand awareness: 85%
- To sell / market a specific product: 74%
- To promote a particular sale, launch or event: 65%
- To encourage customers to visit a website: 73%
- To encourage customers to visit a local store: 59%
- To communicate a not for profit message: 35%
- Other: 6%

Base: 324 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? [multiple responses allowed] (All regions)

- Cinema: 31%
- Coupon sites: 25%
- Direct Mail: 55%
- Directories: 25%
- Local press: 75%
- Magazines: 53%
- Posters and outdoor media: 60%
- Search engines: 60%
- Social media: 68%
- Trade sites relevant to your industry: 32%
- TV: 56%
- Other: 6%

Base: 324 respondents.
Q8: [thinking back to the campaign that Global pitched for] Which other media did you also consider using at the time? [multiple responses, prompted answer. Respondents allowed to not choose any options] (All regions)

<table>
<thead>
<tr>
<th>Media</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>6%</td>
</tr>
<tr>
<td>Coupon sites</td>
<td>10%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>36%</td>
</tr>
<tr>
<td>Directories</td>
<td>19%</td>
</tr>
<tr>
<td>Local press</td>
<td>58%</td>
</tr>
<tr>
<td>Magazines</td>
<td>40%</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>41%</td>
</tr>
<tr>
<td>Other radio</td>
<td>44%</td>
</tr>
<tr>
<td>Search engines – e.g. Google</td>
<td>36%</td>
</tr>
<tr>
<td>Social media – e.g. Facebook</td>
<td>42%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>20%</td>
</tr>
<tr>
<td>TV</td>
<td>14%</td>
</tr>
<tr>
<td>Other</td>
<td>12%</td>
</tr>
<tr>
<td>No other media</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: 488 respondents. Question was preceded by the statement: “As I mentioned earlier, we are acting on behalf of a media company. That media company is Global Radio which owns the [INSERT STATIONS’ NAMES DEPENDING ON AREA] radio stations. We understand that you discussed advertising on one of these stations in the last year but decided not to go ahead and book a campaign. Global Radio is interested in understanding what motivated that decision and what you decided to do instead (if anything).
Q9.a: ...And what media did you end up using? [multiple responses allowed] (All regions, all respondents)

- Cinema: 1%
- Coupon sites: 5%
- Direct Mail: 29%
- Directories: 14%
- Local press: 27%
- Magazines: 30%
- Posters and outdoor media: 33%
- Other radio: 29%
- Search engines: 27%
- Social media: 33%
- Trade sites: 14%
- TV: 5%
- Other: 10%
- Campaign never happened: 6%
- Not asked: 12%

Base: 488 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (All regions, price-sensitive respondents)

Base: 246 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed]
(All regions, radio users in last 3 years)

Base: 324 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (All regions, Global users in last 3 years)

Base: 140 respondents.
Q9.c: [If 9.a = other radio] Which other radio stations did you use? [multiple responses allowed] (All regions)

- Owned by Global: 21
- Owned by RSL: 58
- Owned by third party: 91
- Don't know which radio station: 4

Base: 143 respondents.
Q 10: If the campaign proposed by [INSERT GLOBAL STATION’S NAME] had been [5%/10%/15%] cheaper (i.e. if it had offered you the same slots with a discount of [5%/10%/15%] off the quoted price) how would that have affected your decision? (All regions)

<table>
<thead>
<tr>
<th>Percentage Discount</th>
<th>Very Likely to Choose</th>
<th>Somewhat More Likely</th>
<th>No Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>8%</td>
<td>26%</td>
<td>66%</td>
</tr>
<tr>
<td>10%</td>
<td>17%</td>
<td>33%</td>
<td>50%</td>
</tr>
<tr>
<td>15%</td>
<td>29%</td>
<td>34%</td>
<td>36%</td>
</tr>
</tbody>
</table>

Base: 488 respondents.
London results
Q1: Can you tell me approximately what your total advertising spend was in 2011? (London)

- **≥ 100k**: 24%
- **90k - 100k**: 0%
- **80k - 90k**: 1%
- **70k - 80k**: 1%
- **60k - 70k**: 4%
- **50k - 60k**: 15%
- **40k - 50k**: 3%
- **30k - 40k**: 1%
- **20k - 30k**: 13%
- **10k - 20k**: 10%
- **5k - 10k**: 10%
- **< 5k**: 13%
- **Undisclosed/Don't know**: 6%

*Base: 72 respondents*
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? [multiple responses allowed, prompted question] (London)

- Cinema: 4%
- Coupon sites: 11%
- Direct Mail: 31%
- Directories: 51%
- Local press: 63%
- Magazines: 63%
- Posters and outdoor media: 53%
- Radio: 46%
- Search engines: 64%
- Social media: 54%
- Trade sites: 35%
- TV: 18%
- Other: 17%
- Don’t know: 0%

Base: 72 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? [single response] (London)

Base: All London respondents identified as using each media format in the last year. Cinema excluded due to low sample size.
Q4: And what other types of media did you consider using in addition to those that you have told me about? [multiple responses, prompted answer. Respondents allowed to not choose any options] (London)

Base: 72 respondents. “Actually used” media figures are based on Q2 responses.
Q5: [If Radio not chosen in Question 2] Have you advertised on radio at all in the last three years? (London)

- Used radio in 2011 (Question 2): 46%
- Used radio in 2009 or 2010, but not 2011: 13%
- Not used radio in last 3 years: 42%

Base: 72 respondents. One respondent responded with "Don't know", which is categorised as "Not used radio in last 3 years".
Q6: [If radio=yes at Question 2 or 5] What are your campaign objectives in using radio? [multiple responses allowed, prompted question] (London)

- To promote general brand awareness: 81%
- To sell / market a specific product: 83%
- To promote a particular sale, launch or event: 52%
- To encourage customers to visit a website: 81%
- To encourage customers to visit a local store: 48%
- To communicate a not for profit message: 19%
- Other: 0%

Base: 42 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? [multiple responses allowed] (London)

- Cinema: 24%
- Coupon sites: 19%
- Direct Mail: 29%
- Directories: 17%
- Local press: 55%
- Magazines: 40%
- Posters and outdoor media: 33%
- Search engines: 57%
- Social media: 40%
- Trade sites relevant to your industry: 26%
- TV: 55%
- Other: 5%

Base: 42 respondents.
Q8: [thinking back to the campaign that Global pitched for] Which other media did you also consider using at the time? [multiple responses, prompted answer. Respondents allowed to not choose any options] (London)

- Cinema: 4%
- Coupon sites: 7%
- Direct Mail: 31%
- Directories: 13%
- Local press: 42%
- Magazines: 35%
- Posters and outdoor media: 32%
- Other radio: 35%
- Search engines – e.g. Google: 44%
- Social media – e.g. Facebook: 39%
- Trade sites: 18%
- TV: 14%
- Other: 19%
- No other media: 14%

Base: 72 respondents. Question was preceded by the statement: “As I mentioned earlier, we are acting on behalf of a media company. That media company is Global Radio which owns the [INSERT STATIONS’ NAMES DEPENDING ON AREA] radio stations. We understand that you discussed advertising on one of these stations in the last year but decided not to go ahead and book a campaign. Global Radio is interested in understanding what motivated that decision and what you decided to do instead (if anything).
Q9.a: ...And what media did you end up using? [multiple responses allowed] (London, all respondents)

Base: 72 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (London, price-sensitive respondents)

<table>
<thead>
<tr>
<th>Media</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>3%</td>
</tr>
<tr>
<td>Coupon sites</td>
<td>6%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>31%</td>
</tr>
<tr>
<td>Directories</td>
<td>23%</td>
</tr>
<tr>
<td>Local press</td>
<td>37%</td>
</tr>
<tr>
<td>Magazines</td>
<td>37%</td>
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<tr>
<td>Other radio</td>
<td>37%</td>
</tr>
<tr>
<td>Search engines</td>
<td>54%</td>
</tr>
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</tr>
<tr>
<td>Trade sites</td>
<td>23%</td>
</tr>
<tr>
<td>TV</td>
<td>14%</td>
</tr>
<tr>
<td>Other</td>
<td>17%</td>
</tr>
<tr>
<td>Campaign never happened</td>
<td>3%</td>
</tr>
<tr>
<td>Not asked</td>
<td>11%</td>
</tr>
</tbody>
</table>

Base: 35 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (London, radio users in last 3 years)

- Cinema: 2%
- Coupon sites: 5%
- Direct Mail: 26%
- Directories: 14%
- Local press: 45%
- Magazines: 29%
- Posters and outdoor media: 33%
- Other radio: 43%
- Search engines: 36%
- Social media: 36%
- Trade sites: 10%
- TV: 14%
- Other: 14%
- Campaign never happened: 2%
- Not asked: 12%

Base: 42 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (London, Global users in last 3 years)

- Cinema: 0%
- Coupon sites: 0%
- Direct Mail: 30%
- Directories: 10%
- Local press: 50%
- Magazines: 20%
- Posters and outdoor media: 30%
- Other radio: 20%
- Search engines: 30%
- Social media: 30%
- Trade sites: 0%
- TV: 10%
- Other: 10%
- Campaign never happened: 0%
- Not asked: 20%

Base: 10 respondents.
Q9.c: [If 9.a = other radio] Which other radio stations did you use? [multiple responses allowed] (London)

- Absolute London: 3
- Kiss: 6
- Magic: 0
- Smooth: 4
- Other: 14
- Total: 27

Base: 12 respondents. Absolute numbers provided given low sample size in some areas. Of the 8 respondents that have switched some spend to 'Other' stations, one specified switching to LBC. Other radio stations specified in the 'Other' category include Represent Radio, Premier Christian Radio, Voice of Africa, Choice, Polish Radio London, KMFM, and Heart FM.
Q 10: If the campaign proposed by [INSERT GLOBAL STATION’S NAME] had been [5%/10%/15%] cheaper (i.e. if it had offered you the same slots with a discount of [5%/10%/15%] off the quoted price) how would that have affected your decision? (London)

<table>
<thead>
<tr>
<th>Discount</th>
<th>Very Likely</th>
<th>Somewhat More Likely</th>
<th>Made No Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>11%</td>
<td>25%</td>
<td>64%</td>
</tr>
<tr>
<td>10%</td>
<td>22%</td>
<td>26%</td>
<td>51%</td>
</tr>
<tr>
<td>15%</td>
<td>31%</td>
<td>31%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Base: 72 respondents.
East Midlands results
Q1: Can you tell me approximately what your total advertising spend was in 2011? (East Midlands)

Base: 105 respondents
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? [multiple responses allowed, prompted question] (East Midlands)

- Cinema: 0%
- Coupon sites: 10%
- Direct Mail: 51%
- Directories: 37%
- Local press: 81%
- Magazines: 57%
- Posters and outdoor media: 56%
- Radio: 46%
- Search engines: 62%
- Social media: 49%
- Trade sites: 36%
- TV: 9%
- Other: 15%
- Don’t know: 2%

Base: 105 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? [single response] (East Midlands)

- Coupon sites: 36% Very important, 36% Somewhat important
- Direct Mail: 48% Very important, 39% Somewhat important
- Directories: 56% Very important, 23% Somewhat important
- Local press: 58% Very important, 28% Somewhat important
- Magazines: 60% Very important, 37% Somewhat important
- Posters and outdoor media: 54% Very important, 37% Somewhat important
- Radio: 63% Very important, 33% Somewhat important
- Search engines: 60% Very important, 20% Somewhat important
- Social media: 41% Very important, 27% Somewhat important
- Trade sites: 50% Very important, 34% Somewhat important
- TV: 56% Very important, 33% Somewhat important
- Other: 63% Very important, 25% Somewhat important

Base: All East Midlands respondents identified as using each media format in the last year. Cinema excluded due to low sample size.
Q4: And what other types of media did you consider using in addition to those that you have told me about? [multiple responses, prompted answer. Respondents allowed to not choose any options] (East Midlands)

Base: 105 respondents. “Actually used” media figures are based on Q2 responses.
Q5: [If Radio not chosen in Question 2] Have you advertised on radio at all in the last three years? (East Midlands)

- Used radio in 2011 (Question 2): 46%
- Used radio in 2009 or 2010, but not 2011: 10%
- Not used radio in last 3 years: 45%

Base: 105 respondents.
Q6: [If radio=yes at Question 2 or 5] What are your campaign objectives in using radio? [multiple responses allowed, prompted question] (East Midlands)

- To promote general brand awareness: 83%
- To sell / market a specific product: 81%
- To promote a particular sale, launch or event: 71%
- To encourage customers to visit a website: 78%
- To encourage customers to visit a local store: 64%
- To communicate a not for profit message: 40%
- Other: 14%

Base: 58 respondents
Q7: What other types of media could you use to meet the same campaign objectives as radio? [multiple responses allowed] (East Midlands)

- Cinema: 31%
- Coupon sites: 22%
- Direct Mail: 62%
- Directories: 24%
- Local press: 81%
- Magazines: 66%
- Posters and outdoor media: 62%
- Search engines: 69%
- Social media: 69%
- Trade sites relevant to your industry: 29%
- TV: 55%
- Other: 9%

Base: 58 respondents.
Q8: [thinking back to the campaign that Global pitched for] Which other media did you also consider using at the time? [multiple responses, prompted answer. Respondents allowed to not choose any options] (East Midlands)

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>3%</td>
</tr>
<tr>
<td>Coupon sites</td>
<td>11%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>38%</td>
</tr>
<tr>
<td>Directories</td>
<td>20%</td>
</tr>
<tr>
<td>Local press</td>
<td>59%</td>
</tr>
<tr>
<td>Magazines</td>
<td>47%</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>39%</td>
</tr>
<tr>
<td>Other radio</td>
<td>43%</td>
</tr>
<tr>
<td>Search engines – e.g. Google</td>
<td>38%</td>
</tr>
<tr>
<td>Social media – e.g. Facebook</td>
<td>42%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>24%</td>
</tr>
<tr>
<td>TV</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
<tr>
<td>No other media</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: 105 respondents. Question was preceded by the statement: “As I mentioned earlier, we are acting on behalf of a media company. That media company is Global Radio which owns the [INSERT STATIONS’ NAMES DEPENDING ON AREA] radio stations. We understand that you discussed advertising on one of these stations in the last year but decided not to go ahead and book a campaign. Global Radio is interested in understanding what motivated that decision and what you decided to do instead (if anything).
Q9.a: ...And what media did you end up using? [multiple responses allowed]
(East Midlands, all respondents)

- Cinema: 0%
- Coupon sites: 3%
- Direct Mail: 31%
- Directories: 12%
- Local press: 46%
- Magazines: 28%
- Posters and outdoor media: 31%
- Other radio: 29%
- Search engines: 27%
- Social media: 31%
- Trade sites: 15%
- TV: 1%
- Other: 5%
- Campaign never happened: 12%
- Not asked: 12%

Base: 105 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed]  
(East Midlands, price-sensitive respondents)

- Cinema: 0%
- Coupon sites: 4%
- Direct Mail: 33%
- Directories: 23%
- Local press: 50%
- Magazines: 33%
- Posters and outdoor media: 38%
- Other radio: 29%
- Search engines: 33%
- Social media: 29%
- Trade sites: 17%
- TV: 2%
- Other: 2%
- Campaign never happened: 13%
- Not asked: 13%

Base: 48 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (East Midlands, radio users in last 3 years)

Base: 58 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] 
(East Midlands, Global users in last 3 years)

Base: 37 respondents.
Q9.c: [If 9.a = other radio] Which other radio stations did you use? [multiple responses allowed] (East Midlands)

Base: 30 respondents. Absolute numbers provided given low sample size in some areas. Of the 13 respondents that have switched some spend to 'Other' stations, two specified switching to Capital Radio and one to Classic FM. Other radio stations specified in the 'Other' category include HFM, Cool FM, U105, Citybeat, Heart FM, Real Radio, Kiss FM, Kemet FM, Hermitage FM, Eva FM [sic], Free Radio, and Hallum FM.
Q 10: If the campaign proposed by [INSERT GLOBAL STATION’S NAME] had been [5%/10%/15%] cheaper (i.e. if it had offered you the same slots with a discount of [5%/10%/15%] off the quoted price) how would that have affected your decision? (East Midlands)

<table>
<thead>
<tr>
<th>Discount</th>
<th>Very Likely</th>
<th>Somewhat More Likely</th>
<th>Made No Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>7%</td>
<td>22%</td>
<td>71%</td>
</tr>
<tr>
<td>10%</td>
<td>18%</td>
<td>28%</td>
<td>54%</td>
</tr>
<tr>
<td>15%</td>
<td>26%</td>
<td>35%</td>
<td>39%</td>
</tr>
</tbody>
</table>

Base: 105 respondents.
West Midlands results
Q1: Can you tell me approximately what your total advertising spend was in 2011? (West Midlands)

- ≥ 100k: 20%
- 90k - 100k: 0%
- 80k - 90k: 0%
- 70k - 80k: 0%
- 60k - 70k: 1%
- 50k - 60k: 6%
- 40k - 50k: 4%
- 30k - 40k: 3%
- 20k - 30k: 22%
- 10k - 20k: 14%
- 5k - 10k: 13%
- < 5k: 13%
- Undisclosed/Don't know: 5%

Base: 79 respondents.
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? [multiple responses allowed, prompted question] (West Midlands)

Base: 79 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? [single response] (West Midlands)

Base: All West Midlands respondents identified as using each media format in the last year. Cinema excluded due to low sample size.
Q4: And what other types of media did you consider using in addition to those that you have told me about? [multiple responses, prompted answer. Respondents allowed to not choose any options] (West Midlands)

Base: 79 respondents. “Actually used” media figures are based on Q2 responses.
Q5: [If Radio not chosen in Question 2] Have you advertised on radio at all in the last three years? (West Midlands)

- Used radio in 2011 (Question 2): 62%
- Used radio in 2009 or 2010, but not 2011: 14%
- Not used radio in last 3 years: 24%

Base: 79 respondents.
Q6: [If radio=yes at Question 2 or 5] What are your campaign objectives in using radio? [multiple responses allowed, prompted question] (West Midlands)

- To promote general brand awareness: 85%
- To sell / market a specific product: 70%
- To promote a particular sale, launch or event: 67%
- To encourage customers to visit a website: 70%
- To encourage customers to visit a local store: 67%
- To communicate a not for profit message: 37%
- Other: 5%

Base: 60 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? [multiple responses allowed] (West Midlands)

- Cinema: 32%
- Coupon sites: 23%
- Direct Mail: 55%
- Directories: 22%
- Local press: 67%
- Magazines: 42%
- Posters and outdoor media: 62%
- Search engines: 50%
- Social media: 67%
- Trade sites relevant to your industry: 25%
- TV: 42%
- Other: 8%

Base: 60 respondents.
Q8: [thinking back to the campaign that Global pitched for] Which other media did you also consider using at the time? [multiple responses, prompted answer. Respondents allowed to not choose any options] (West Midlands)

Base: 79 respondents. Question was preceded by the statement: “As I mentioned earlier, we are acting on behalf of a media company. That media company is Global Radio which owns the [INSERT STATIONS’ NAMES DEPENDING ON AREA] radio stations. We understand that you discussed advertising on one of these stations in the last year but decided not to go ahead and book a campaign. Global Radio is interested in understanding what motivated that decision and what you decided to do instead (if anything).
Q9.a: ...And what media did you end up using? [multiple responses allowed]  
(West Midlands, all respondents)

- Cinema: 0%
- Coupon sites: 8%
- Direct Mail: 23%
- Directories: 15%
- Local press: 42%
- Magazines: 29%
- Posters and outdoor media: 30%
- Other radio: 32%
- Search engines: 22%
- Social media: 28%
- Trade sites: 9%
- TV: 4%
- Other: 11%
- Campaign never happened: 5%
- Not asked: 10%

Base: 79 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (West Midlands, price-sensitive respondents)

- Cinema: 0%
- Coupon sites: 12%
- Direct Mail: 27%
- Directories: 17%
- Local press: 41%
- Magazines: 32%
- Posters and outdoor media: 39%
- Other radio: 32%
- Search engines: 29%
- Social media: 37%
- Trade sites: 10%
- TV: 7%
- Other: 12%
- Campaign never happened: 5%
- Not asked: 7%

Base: 41 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed]
(West Midlands, radio users in last 3 years)

Base: 60 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed]
(West Midlands, Global users in last 3 years)

- Cinema: 0%
- Coupon sites: 0%
- Direct Mail: 20%
- Directories: 0%
- Local press: 40%
- Magazines: 20%
- Posters and outdoor media: 32%
- Other radio: 28%
- Search engines: 12%
- Social media: 24%
- Trade sites: 4%
- TV: 0%
- Other: 16%
- Campaign never happened: 0%
- Not asked: 28%

Base: 25 respondents.
Q9.c: [If 9.a = other radio] Which other radio stations did you use? [multiple responses allowed] (West Midlands)

Base: 19 respondents. Absolute numbers provided given low sample size in some areas. Of the 4 respondents that have switched some spend to 'Other' stations, one specified switching to Capital Radio. Other radio stations specified in the 'Other' category include community radio, Clyde 1, and Real Radio.
Q 10: If the campaign proposed by [INSERT GLOBAL STATION’S NAME] had been [5%/10%/15%] cheaper (i.e. if it had offered you the same slots with a discount of [5%/10%/15%] off the quoted price) how would that have affected your decision? (West Midlands)

- I would have been very likely to choose the Global Radio station: 5%
- I would have been somewhat more likely to choose the Global Radio station: 33%
- It would have made no difference: 54%

- I would have been very likely to choose the Global Radio station: 10%
- I would have been somewhat more likely to choose the Global Radio station: 32%
- It would have made no difference: 48%

- I would have been very likely to choose the Global Radio station: 15%
- I would have been somewhat more likely to choose the Global Radio station: 32%
- It would have made no difference: 37%

Base: 79 respondents.
North East results
Q1: Can you tell me approximately what your total advertising spend was in 2011? (North East)

<table>
<thead>
<tr>
<th>Spend Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>≥ 100k</td>
<td>22%</td>
</tr>
<tr>
<td>90k - 100k</td>
<td>2%</td>
</tr>
<tr>
<td>80k - 90k</td>
<td>1%</td>
</tr>
<tr>
<td>70k - 80k</td>
<td>2%</td>
</tr>
<tr>
<td>60k - 70k</td>
<td>0%</td>
</tr>
<tr>
<td>50k - 60k</td>
<td>5%</td>
</tr>
<tr>
<td>40k - 50k</td>
<td>3%</td>
</tr>
<tr>
<td>30k - 40k</td>
<td>5%</td>
</tr>
<tr>
<td>20k - 30k</td>
<td>13%</td>
</tr>
<tr>
<td>10k - 20k</td>
<td>17%</td>
</tr>
<tr>
<td>5k - 10k</td>
<td>16%</td>
</tr>
<tr>
<td>&lt; 5k</td>
<td>13%</td>
</tr>
<tr>
<td>Undisclosed/Don't know</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: 96 respondents.
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? [multiple responses allowed, prompted question]
(North East)

- Cinema: 5%
- Coupon sites: 11%
- Direct Mail: 47%
- Directories: 51%
- Local press: 94%
- Magazines: 69%
- Posters and outdoor media: 59%
- Radio: 57%
- Search engines: 53%
- Social media: 46%
- Trade sites: 40%
- TV: 17%
- Other: 13%
- Don’t know: 0%

Base: 96 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? [single response] (North East)

<table>
<thead>
<tr>
<th>Media Format</th>
<th>Very Important</th>
<th>Somewhat Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coupon sites</td>
<td>64%</td>
<td>9%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>53%</td>
<td>31%</td>
</tr>
<tr>
<td>Directories</td>
<td>45%</td>
<td>41%</td>
</tr>
<tr>
<td>Local press</td>
<td>63%</td>
<td>28%</td>
</tr>
<tr>
<td>Magazines</td>
<td>58%</td>
<td>30%</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>60%</td>
<td>32%</td>
</tr>
<tr>
<td>Radio</td>
<td>60%</td>
<td>31%</td>
</tr>
<tr>
<td>Search engines</td>
<td>55%</td>
<td>31%</td>
</tr>
<tr>
<td>Social media</td>
<td>61%</td>
<td>16%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>50%</td>
<td>34%</td>
</tr>
<tr>
<td>TV</td>
<td>75%</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>67%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Base: All North East respondents identified as using each media format in the last year. Cinema excluded due to low sample size.
Q4: And what other types of media did you consider using in addition to those that you have told me about? [multiple responses, prompted answer. Respondents allowed to not choose any options] (North East)

Base: 96 respondents. “Actually used” media figures are based on Q2 responses.
Q5: [If Radio not chosen in Question 2] Have you advertised on radio at all in the last three years? (North East)

- Used radio in 2011 (Question 2): 57%
- Used radio in 2009 or 2010, but not 2011: 19%
- Not used radio in last 3 years: 24%

Base: 96 respondents. One respondent responded with "Don't know", which is categorised as "Not used radio in last 3 years".
Q6: [If radio=yes at Question 2 or 5] What are your campaign objectives in using radio? [multiple responses allowed, prompted question] (North East)

- To promote general brand awareness: 85%
- To sell / market a specific product: 70%
- To promote a particular sale, launch or event: 63%
- To encourage customers to visit a website: 67%
- To encourage customers to visit a local store: 53%
- To communicate a not for profit message: 37%
- Other: 3%

Base: 73 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? [multiple responses allowed] (North East)

- Cinema: 37%
- Coupon sites: 26%
- Direct Mail: 53%
- Directories: 34%
- Local press: 74%
- Magazines: 53%
- Posters and outdoor media: 60%
- Search engines: 55%
- Social media: 70%
- Trade sites relevant to your industry: 29%
- TV: 74%
- Other: 3%

Base: 73 respondents.
Q8: [thinking back to the campaign that Global pitched for] Which other media did you also consider using at the time? [multiple responses, prompted answer. Respondents allowed to not choose any options]  (North East)

Base: 96 respondents. Question was preceded by the statement: “As I mentioned earlier, we are acting on behalf of a media company. That media company is Global Radio which owns the [INSERT STATIONS’ NAMES DEPENDING ON AREA] radio stations. We understand that you discussed advertising on one of these stations in the last year but decided not to go ahead and book a campaign. Global Radio is interested in understanding what motivated that decision and what you decided to do instead (if anything).
Q9.a: ...And what media did you end up using? [multiple responses allowed] (North East, all respondents)

- Cinema: 2%
- Coupon sites: 5%
- Direct Mail: 27%
- Directories: 17%
- Local press: 47%
- Magazines: 34%
- Posters and outdoor media: 39%
- Other radio: 40%
- Search engines: 23%
- Social media: 26%
- Trade sites: 16%
- TV: 9%
- Other: 7%
- Campaign never happened: 4%
- Not asked: 11%

Base: 96 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed]
(North East, price-sensitive respondents)

Base: 48 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (North East, radio users in last 3 years)

<table>
<thead>
<tr>
<th>Media</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>3%</td>
</tr>
<tr>
<td>Coupon sites</td>
<td>5%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>27%</td>
</tr>
<tr>
<td>Directories</td>
<td>18%</td>
</tr>
<tr>
<td>Local press</td>
<td>48%</td>
</tr>
<tr>
<td>Magazines</td>
<td>29%</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>38%</td>
</tr>
<tr>
<td>Other radio</td>
<td>51%</td>
</tr>
<tr>
<td>Search engines</td>
<td>22%</td>
</tr>
<tr>
<td>Social media</td>
<td>30%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>14%</td>
</tr>
<tr>
<td>TV</td>
<td>12%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>Campaign never happened</td>
<td>5%</td>
</tr>
<tr>
<td>Not asked</td>
<td>10%</td>
</tr>
</tbody>
</table>

Base: 73 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (North East, Global users in last 3 years)

- Cinema: 4%
- Coupon sites: 0%
- Direct Mail: 30%
- Directories: 17%
- Local press: 61%
- Magazines: 26%
- Posters and outdoor media: 39%
- Other radio: 48%
- Search engines: 13%
- Social media: 26%
- Trade sites: 4%
- TV: 17%
- Other: 17%
- Campaign never happened: 4%
- Not asked: 17%

Base: 23 respondents.
Q9.c: [If 9.a = other radio] Which other radio stations did you use? [multiple responses allowed] (North East)

Base: 33 respondents. Absolute numbers provided given low sample size in some areas. Of the 9 respondents that have switched some spend to 'Other' stations, two specified switching to Capital Radio and one to Gold Radio. Other radio stations specified in the 'Other' category include Wave FM, Gem 106, Radio Hartlepool and BRMB (now Free Radio Birmingham).
Q 10: If the campaign proposed by [INSERT GLOBAL STATION’S NAME] had been [5%/10%/15%] cheaper (i.e. if it had offered you the same slots with a discount of [5%/10%/15%] off the quoted price) how would that have affected your decision? (North East)

<table>
<thead>
<tr>
<th>Discount</th>
<th>Very Likely to Choose</th>
<th>Somewhat More Likely to Choose</th>
<th>Made No Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>4%</td>
<td>23%</td>
<td>73%</td>
</tr>
<tr>
<td>10%</td>
<td>13%</td>
<td>38%</td>
<td>50%</td>
</tr>
<tr>
<td>15%</td>
<td>26%</td>
<td>36%</td>
<td>38%</td>
</tr>
</tbody>
</table>

Base: 96 respondents.
South Wales results
Q1: Can you tell me approximately what your total advertising spend was in 2011? (South Wales)

Base: 85 respondents.
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? [multiple responses allowed, prompted question] (South Wales)

Base: 85 respondents.

Cinema: 2%
Coupon sites: 12%
Direct Mail: 39%
Directories: 39%
Local press: 76%
Magazines: 69%
Posters and outdoor media: 68%
Radio: 48%
Search engines: 55%
Social media: 60%
Trade sites: 36%
TV: 9%
Other: 20%
Don’t know: 0%
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? [single response] (South Wales)

<table>
<thead>
<tr>
<th>Media Format</th>
<th>Very important</th>
<th>Somewhat important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coupon sites</td>
<td>50%</td>
<td>30%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>58%</td>
<td>33%</td>
</tr>
<tr>
<td>Directories</td>
<td>56%</td>
<td>36%</td>
</tr>
<tr>
<td>Local press</td>
<td>62%</td>
<td>32%</td>
</tr>
<tr>
<td>Magazines</td>
<td>62%</td>
<td>37%</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>62%</td>
<td>29%</td>
</tr>
<tr>
<td>Radio</td>
<td>71%</td>
<td>27%</td>
</tr>
<tr>
<td>Search engines</td>
<td>62%</td>
<td>23%</td>
</tr>
<tr>
<td>Social media</td>
<td>61%</td>
<td>35%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>63%</td>
<td>35%</td>
</tr>
<tr>
<td>TV</td>
<td>63%</td>
<td>38%</td>
</tr>
<tr>
<td>Other</td>
<td>71%</td>
<td>24%</td>
</tr>
</tbody>
</table>

Base: All South Wales respondents identified as using each media format in the last year. Cinema excluded due to low sample size.
Q4: And what other types of media did you consider using in addition to those that you have told me about? [multiple responses, prompted answer. Respondents allowed to not choose any options] (South Wales)

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Considered using</th>
<th>Actually used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>12%</td>
<td>2%</td>
</tr>
<tr>
<td>Coupon sites</td>
<td>11%</td>
<td>12%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>12%</td>
<td>39%</td>
</tr>
<tr>
<td>Directories</td>
<td>8%</td>
<td>39%</td>
</tr>
<tr>
<td>Local press</td>
<td>76%</td>
<td>7%</td>
</tr>
<tr>
<td>Magazines</td>
<td>69%</td>
<td>4%</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>68%</td>
<td>6%</td>
</tr>
<tr>
<td>Radio</td>
<td>32%</td>
<td>48%</td>
</tr>
<tr>
<td>Search engines</td>
<td>15%</td>
<td>55%</td>
</tr>
<tr>
<td>Social media</td>
<td>13%</td>
<td>60%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>14%</td>
<td>36%</td>
</tr>
<tr>
<td>TV</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>Don't know</td>
<td>20%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Base: 85 respondents. “Actually used” media figures are based on Q2 responses.
Q5: [If Radio not chosen in Question 2] Have you advertised on radio at all in the last three years? (South Wales)

- Used radio in 2011 (Question 2): 48%
- Used radio in 2009 or 2010, but not 2011: 14%
- Not used radio in last 3 years: 38%

Base: 85 respondents.
Q6: [If radio=yes at Question 2 or 5] What are your campaign objectives in using radio? [multiple responses allowed, prompted question] (South Wales)

<table>
<thead>
<tr>
<th>Objective</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To promote general brand awareness</td>
<td>85%</td>
</tr>
<tr>
<td>To sell / market a specific product</td>
<td>72%</td>
</tr>
<tr>
<td>To promote a particular sale, launch or event</td>
<td>66%</td>
</tr>
<tr>
<td>To encourage customers to visit a website</td>
<td>64%</td>
</tr>
<tr>
<td>To encourage customers to visit a local store</td>
<td>60%</td>
</tr>
<tr>
<td>To communicate a not for profit message</td>
<td>40%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: 53 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? [multiple responses allowed] (South Wales)

Base: 53 respondents.
Q8: [thinking back to the campaign that Global pitched for] Which other media did you also consider using at the time? [multiple responses, prompted answer. Respondents allowed to not choose any options] (South Wales)

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>6%</td>
</tr>
<tr>
<td>Coupon sites</td>
<td>6%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>40%</td>
</tr>
<tr>
<td>Directories</td>
<td>19%</td>
</tr>
<tr>
<td>Local press</td>
<td>59%</td>
</tr>
<tr>
<td>Magazines</td>
<td>41%</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>40%</td>
</tr>
<tr>
<td>Other radio</td>
<td>41%</td>
</tr>
<tr>
<td>Search engines – e.g. Google</td>
<td>40%</td>
</tr>
<tr>
<td>Social media – e.g. Facebook</td>
<td>45%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>21%</td>
</tr>
<tr>
<td>TV</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>12%</td>
</tr>
<tr>
<td>No other media</td>
<td>14%</td>
</tr>
</tbody>
</table>

Base: 85 respondents. Question was preceded by the statement: “As I mentioned earlier, we are acting on behalf of a media company. That media company is Global Radio which owns the [INSERT STATIONS’ NAMES DEPENDING ON AREA] radio stations. We understand that you discussed advertising on one of these stations in the last year but decided not to go ahead and book a campaign. Global Radio is interested in understanding what motivated that decision and what you decided to do instead (if anything).
Q9.a: ...And what media did you end up using? [multiple responses allowed] (South Wales, all respondents)

- Cinema: 0%
- Coupon sites: 4%
- Direct Mail: 35%
- Directories: 15%
- Local press: 46%
- Magazines: 26%
- Posters and outdoor media: 27%
- Other radio: 26%
- Search engines: 34%
- Social media: 36%
- Trade sites: 14%
- TV: 5%
- Other: 12%
- Campaign never happened: 5%
- Not asked: 14%

Base: 85 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (South Wales, price-sensitive respondents)

![Bar chart showing percentages of media used]

- Cinema: 0%
- Coupon sites: 2%
- Direct Mail: 43%
- Directories: 14%
- Local press: 52%
- Magazines: 30%
- Posters and outdoor media: 27%
- Other radio: 30%
- Search engines: 30%
- Social media: 41%
- Trade sites: 11%
- TV: 7%
- Other: 11%
- Campaign never happened: 7%
- Not asked: 9%

Base: 44 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed]
(South Wales, radio users in last 3 years)

- Cinema: 0%
- Coupon sites: 2%
- Direct Mail: 38%
- Directories: 15%
- Local press: 49%
- Magazines: 26%
- Posters and outdoor media: 32%
- Other radio: 42%
- Search engines: 32%
- Social media: 42%
- Trade sites: 8%
- TV: 6%
- Other: 15%
- Campaign never happened: 4%
- Not asked: 11%

Base: 53 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (South Wales, Global users in last 3 years)

- Cinema: 0%
- Coupon sites: 0%
- Direct Mail: 48%
- Directories: 9%
- Local press: 57%
- Magazines: 30%
- Posters and outdoor media: 35%
- Other radio: 26%
- Search engines: 35%
- Social media: 39%
- Trade sites: 9%
- TV: 4%
- Other: 22%
- Campaign never happened: 4%
- Not asked: 4%

Base: 23 respondents.
Q9.c: [If 9.a = other radio] Which other radio stations did you use? [multiple responses allowed] (South Wales)

Bay Radio: 3
Bridge FM: 4
Kiss West 101: 0
Nation: 5
Radio Carmathenshire: 3
Radio Ceredigion: 3
Radio Pembrokeshire: 3
Real: 14
Swansea Sound: 6
Wave 96.4: 5
Other: 7

Base: 26 respondents. Absolute numbers provided given low sample size in some areas. Stations specified in the 'Other' category include Gem, Smooth, and Heart.
Q 10: If the campaign proposed by [INSERT GLOBAL STATION’S NAME] had been [5%/10%/15%] cheaper (i.e. if it had offered you the same slots with a discount of [5%/10%/15%] off the quoted price) how would that have affected your decision? (South Wales)

Base: 85 respondents.
North Wales results
Q1: Can you tell me approximately what your total advertising spend was in 2011? (North Wales)

Base: 51 respondents.
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? [multiple responses allowed, prompted question] (North Wales)

Base: 51 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? [single response] (North Wales)

Base: All North Wales respondents identified as using each media format in the last year. Cinema excluded due to low sample size.
Q4: And what other types of media did you consider using in addition to those that you have told me about? [multiple responses, prompted answer. Respondents allowed to not choose any options] (North Wales)

Base: 51 respondents. “Actually used” media figures are based on Q2 responses.
Q5: [If Radio not chosen in Question 2] Have you advertised on radio at all in the last three years? (North Wales)

- Used radio in 2011 (Question 2): 57%
- Used radio in 2009 or 2010, but not 2011: 18%
- Not used radio in last 3 years: 25%

Base: 51 respondents.
Q6: [If radio=yes at Question 2 or 5] What are your campaign objectives in using radio? [multiple responses allowed, prompted question] (North Wales)

- To promote general brand awareness: 89%
- To sell / market a specific product: 74%
- To promote a particular sale, launch or event: 71%
- To encourage customers to visit a website: 82%
- To encourage customers to visit a local store: 61%
- To communicate a not for profit message: 34%
- Other: 5%

Base: 38 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? [multiple responses allowed] (North Wales)

- Cinema: 26%
- Coupon sites: 39%
- Direct Mail: 61%
- Directories: 18%
- Local press: 82%
- Magazines: 45%
- Posters and outdoor media: 61%
- Search engines: 58%
- Social media: 76%
- Trade sites relevant to your industry: 47%
- TV: 42%
- Other: 8%

Base: 38 respondents.
Q8: [thinking back to the campaign that Global pitched for] Which other media did you also consider using at the time? [multiple responses, prompted answer. Respondents allowed to not choose any options] (North Wales)

<table>
<thead>
<tr>
<th>Media</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>8%</td>
</tr>
<tr>
<td>Coupon sites</td>
<td>16%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>41%</td>
</tr>
<tr>
<td>Directories</td>
<td>27%</td>
</tr>
<tr>
<td>Local press</td>
<td>78%</td>
</tr>
<tr>
<td>Magazines</td>
<td>43%</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>55%</td>
</tr>
<tr>
<td>Other radio</td>
<td>35%</td>
</tr>
<tr>
<td>Search engines – e.g. Google</td>
<td>37%</td>
</tr>
<tr>
<td>Social media – e.g. Facebook</td>
<td>61%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>24%</td>
</tr>
<tr>
<td>TV</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>12%</td>
</tr>
<tr>
<td>No other media</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: 51 respondents. Question was preceded by the statement: “As I mentioned earlier, we are acting on behalf of a media company. That media company is Global Radio which owns the [INSERT STATIONS’ NAMES DEPENDING ON AREA] radio stations. We understand that you discussed advertising on one of these stations in the last year but decided not to go ahead and book a campaign. Global Radio is interested in understanding what motivated that decision and what you decided to do instead (if anything).
Q9.a: ...And what media did you end up using? [multiple responses allowed] (North Wales, all respondents)

- Cinema: 2%
- Coupon sites: 8%
- Direct Mail: 29%
- Directories: 14%
- Local press: 75%
- Magazines: 33%
- Posters and outdoor media: 45%
- Other radio: 18%
- Search engines: 22%
- Social media: 51%
- Trade sites: 12%
- TV: 2%
- Other: 10%
- Campaign never happened: 6%
- Not asked: 6%

Base: 51 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed] (North Wales, price-sensitive respondents)

Base: 30 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed]
(North Wales, radio users in last 3 years)

Base: 38 respondents.
Q9.a: ...And what media did you end up using? [multiple responses allowed]
(North Wales, Global users in last 3 years)

Base: 22 respondents.
Q9.c: [If 9.a = other radio] Which other radio stations did you use? [multiple responses allowed] (North Wales)

Base: 26 respondents.
Q 10: If the campaign proposed by [INSERT GLOBAL STATION’S NAME] had been [5%/10%/15%] cheaper (i.e. if it had offered you the same slots with a discount of [5%/10%/15%] off the quoted price) how would that have affected your decision? (North Wales)

<table>
<thead>
<tr>
<th>Discount (%)</th>
<th>Very Likely</th>
<th>Somewhat More Likely</th>
<th>No Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>10%</td>
<td>29%</td>
<td>61%</td>
</tr>
<tr>
<td>10%</td>
<td>22%</td>
<td>37%</td>
<td>41%</td>
</tr>
<tr>
<td>15%</td>
<td>33%</td>
<td>33%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Base: 85 respondents.