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

- More than £250,001: 5%
- From £100,001 to £250,000: 8%
- From £50,001 to £100,000: 8%
- From £25,001 to £50,000: 10%
- From £10,001 to £25,000: 17%
- From £7,501 to £10,000: 6%
- From £5,001 to £7,500: 5%
- From £2,501 to £5,000: 5%
- From £1,001 to £2,500: 4%
- From £501 to £1,000: 1%
- From £1 to £500: 1%
- Don't know: 31%

Base: 389 respondents
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? [Multiple responses allowed, prompted question]

Base: 389 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, prompted question]

Base: 389 respondents.
Q4: And what other types of media, if any, did you consider using in 2011 in addition to those that you have told me about?
[Multiple responses, prompted answer. Respondents allowed to not choose any options]

- Cinema: 3% Actually used, 7% Considered using
- Coupon: 13% Actually used, 7% Considered using
- Direct Mail: 50% Actually used, 6% Considered using
- Directories: 41% Actually used, 4% Considered using
- Local press: 84% Actually used, 4% Considered using
- Magazines: 61% Actually used, 3% Considered using
- Posters and outdoor media: 61% Actually used, 5% Considered using
- Radio: 95% Actually used, 5% Considered using
- Search engines: 54% Actually used, 7% Considered using
- Social media: 61% Actually used, 9% Considered using
- Trade sites: 31% Actually used, 5% Considered using
- TV: 13% Actually used, 12% Considered using
- Other: 10% Actually used, 16% Considered using
- Don’t know: 4%

Base: 389 respondents.
Q6: What are your campaign objectives in using radio? [Multiple responses allowed, prompted question]

- To promote general brand awareness: 75%
- To sell/market a specific product: 66%
- To promote a particular sale, launch or event: 61%
- To encourage customers to visit a website: 63%
- To encourage customers to visit a local store: 41%
- To communicate a not for profit message: 28%
- Other: 3%

Base: 389 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? 
[Multiple responses, prompted answer. Respondents allowed to not choose any options]

- Cinema: 19%
- Coupon: 10%
- Direct Mail: 35%
- Directories: 14%
- Local press: 56%
- Magazines: 35%
- Posters and outdoor media: 42%
- Search engines: 36%
- Social media: 47%
- Trade sites: 16%
- TV: 41%
- None of the above: 11%
- Other: 8%
- Don't know: 7%

Base: 389 respondents.
Q9: For the last campaign where you advertised on [Insert Global/RSL stations identified at Q8], which other media, if any, did you also consider using at the time? [Multiple responses, prompted answer. Respondents allowed to not choose any options]

- Cinema: 4%
- Coupon: 6%
- Direct Mail: 25%
- Directories: 13%
- Local press: 57%
- Magazines: 31%
- Posters and outdoor media: 37%
- Other radio: 42%
- Search engines: 30%
- Social media: 39%
- Trade sites: 14%
- TV: 13%
- None of the above: 16%
- Other: 6%
- Don't know: 2%

Base: 389 respondents.
Q10: And what media did you end up using in addition to [Insert Global/RSL stations identified at Q8] for that campaign (if any)?
[multiple responses allowed, prompted question]

Base: 389 respondents.
Q11.a: If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? [Multiple responses allowed, prompted question]

- Increase my advertising spend on the other media that I also used for that campaign: 47%
- Increase my advertising spend on different media to those that I used for that campaign: 39%
- I wouldn't have spent the money at all, i.e. I would have reduced my overall campaign spend: 35%
- Don't know: 3%

Base: 389 respondents. Question proceeded by the introduction “I would now like you to think back to the time when you were planning how to allocate your media budget for the last campaign where you used [Insert Global/RSL stations identified at Q8].”
Q11.b(i): What other advertising media would you have been most likely to spend that money on? [Single response, prompted question]

Base: 182 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on the other media that you also used for that campaign."
Q11.b(ii): Which other radio station or stations would you have been most likely to spend that money on? [Multiple responses allowed]

Base: 34 respondents. Question proceeded by the introduction “You have said that you would have spent the money you spent on [Insert Global/RSL stations identified at Q8] on other radio.”
Q11.c(i): What other advertising media would you have been most likely to spend that money on? [Single response, prompted question]

Base: 152 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on different media to those that you used for that campaign."
Q11.c(ii): Which other radio station or stations would you have been most likely to spend that money on? [Multiple responses allowed]

Base: 54 respondents. Question proceeded by the introduction “You have said that you would have spent the money you spent on [Insert Global/RSL stations identified at Q8] on other radio.”
Combined results: Q11.a/b(i)/c(i): If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? [Multiple responses allowed, prompted question]

Base: 389 respondents. Results calculated by aggregating answers to questions 11(a) (b) and (c). All percentages calculated with a base of the total number of respondents in that area. Note that flow of questions allowed respondents to choose multiple options (resulting in more options being chosen than the number of respondents). To ensure percentages summed to 100%, each respondent was given a total “weight” of 1. Where a respondent chose multiple options those options were then appropriately weighted such that the respondent was given a total weight of 1 (e.g. a respondent choosing two alternative radio stations would have a weight of one half given to each in the final results).
Q12.a/b/c: If the cost of advertising on [Insert Global/RSL stations identified at Q8] increased by 5/10/15% how would that most likely have affected your advertising spend for your last campaign on [Insert Global/RSL stations identified at Q8]? [Single response, prompted]

Base: 389 respondents. Question proceeded by the introduction “I would now like to ask you some general questions about the cost of advertising on [Insert Global/RSL stations identified at Q8].”
London results
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? (London) [Multiple responses allowed, prompted question]

Base: 37 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? (London) [Single response, prompted question]

Base: 37 respondents.
Q4: And what other types of media, if any, did you consider using in 2011 in addition to those that you have told me about? (London)

[Multiple responses, prompted answer. Respondents allowed to not choose any options]

Base: 37 respondents.
Q6: What are your campaign objectives in using radio? (London)
[Multiple responses allowed, prompted question]

- To promote general brand awareness: 73%
- To sell/market a specific product: 70%
- To promote a particular sale, launch or event: 62%
- To encourage customers to visit a website: 76%
- To encourage customers to visit a local store: 35%
- To communicate a not for profit message: 24%
- Other: 8%

Base: 37 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? (London)

[Multiple responses, prompted answer. Respondents allowed to not choose any options]

Base: 37 respondents.
Q9: For the last campaign where you advertised on [Insert Global/RSL stations identified at Q8], which other media, if any, did you also consider using at the time? (London) [Multiple responses, prompted answer. Respondents allowed to not choose any options]

Base: 37 respondents.
Q10: And what media did you end up using in addition to [Insert Global/RSL stations identified at Q8] for that campaign (if any)? (London) [multiple responses allowed, prompted question]

Base: 37 respondents.
Q11.a: If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (London) [Multiple responses allowed, prompted question]

- Increase my advertising spend on the other media that I also used for that campaign: 57%
- Increase my advertising spend on different media to those that I used for that campaign: 43%
- I wouldn't have spent the money at all, i.e. I would have reduced my overall campaign spend: 27%
- Don't know: 3%

Base: 37 respondents. Question proceeded by the introduction “I would now like you to think back to the time when you were planning how to allocate your media budget for the last campaign where you used [Insert Global/RSL stations identified at Q8].”
Q11.b(i): What other advertising media would you have been most likely to spend that money on? (London) [Single response, prompted question]

Base: 21 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on the other media that you also used for that campaign."
Q11.b(ii): Which other radio station or stations would you have been most likely to spend that money on? (London) [Multiple responses allowed]

Base: 3 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."
Q11.c(i): What other advertising media would you have been most likely to spend that money on? (London) [Single response, prompted question]

Base: 16 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on different media to those that you used for that campaign."
Q11.c(ii): Which other radio station or stations would you have been most likely to spend that money on? (London) [Multiple responses allowed]

Base: 7 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."

- Heart: 1
- Kiss: 2
- Magic: 3 (Global 2, RSL 1)
- XFM: 1
- Don't know: 1
Combined Q11.a/b(i)/c(i): If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (London) [Multiple responses allowed, prompted question]

Base: 37 respondents. Results calculated by aggregating answers to questions 11(a) (b) and (c). All percentages calculated with a base of the total number of respondents in that area. Note that flow of questions allowed respondents to choose multiple options (resulting in more options being chosen than the number of respondents). To ensure percentages summed to 100%, each respondent was given a total “weight” of 1. Where a respondent chose multiple options those options were then appropriately weighted such that the respondent was given a total weight of 1 (e.g. a respondent choosing two alternative radio stations would have a weight of one half given to each in the final results).
Q12.a/b/c: If the cost of advertising on [Insert Global/RSL stations identified at Q8] increased by 5/10/15% how would that most likely have affected your advertising spend for your last campaign on [Insert Global/RSL stations identified at Q8]? (London) [Single response, prompted]

Base: 37 respondents. Question proceeded by the introduction “I would now like to ask you some general questions about the cost of advertising on [Insert Global/RSL stations identified at Q8].”
North East results
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? (North East)
[Multiple responses allowed, prompted question]

- Cinema: 0%
- Coupon: 13%
- Direct Mail: 59%
- Directories: 45%
- Local press: 92%
- Magazines: 69%
- Posters and outdoor media: 59%
- Radio: 91%
- Search engines: 55%
- Social media: 69%
- Trade sites: 33%
- TV: 16%
- Other: 9%
- Don't know: 0%

Base: 64 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? (North East) [Single response, prompted question]

Base: 64 respondents.
Q4: And what other types of media, if any, did you consider using in 2011 in addition to those that you have told me about? (North East)

[Multiple responses, prompted answer. Respondents allowed to not choose any options]

Base: 64 respondents.
Q6: What are your campaign objectives in using radio? (North East) [Multiple responses allowed, prompted question]

To promote general brand awareness: 78%
To sell/market a specific product: 72%
To promote a particular sale, launch or event: 53%
To encourage customers to visit a website: 64%
To encourage customers to visit a local store: 39%
To communicate a not for profit message: 33%
Other: 0%

Base: 64 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? (North East)

[Multiple responses, prompted answer. Respondents allowed to not choose any options]

Base: 64 respondents.
Q9: For the last campaign where you advertised on [Insert Global/RSL stations identified at Q8], which other media, if any, did you also consider using at the time? (North East) [Multiple responses, prompted answer. Respondents allowed to not choose any options]

- Cinema: 5%
- Coupon: 5%
- Direct Mail: 36%
- Directories: 22%
- Local press: 33%
- Magazines: 38%
- Posters and outdoor media: 38%
- Other radio: 48%
- Search engines: 36%
- Social media: 50%
- Trade sites: 19%
- TV: 20%
- None of the above: 13%
- Other: 2%
- Don't know: 2%

Base: 64 respondents.
Q10: And what media did you end up using in addition to [Insert Global/RSL stations identified at Q8] for that campaign (if any)? (North East) [multiple responses allowed, prompted question]

Base: 64 respondents.
Q11.a: If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (North East) [Multiple responses allowed, prompted question]

- Increase my advertising spend on the other media that I also used for that campaign (45%)
- Increase my advertising spend on different media to those that I used for that campaign (41%)
- I wouldn’t have spent the money at all, i.e. I would have reduced my overall campaign spend (34%)
- Don’t know (2%)

Base: 64 respondents. Question proceeded by the introduction “I would now like you to think back to the time when you were planning how to allocate your media budget for the last campaign where you used [Insert Global/RSL stations identified at Q8].”
Q11.b(i): What other advertising media would you have been most likely to spend that money on? (North East) [Single response, prompted question]

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<thead>
<tr>
<th>Media</th>
<th>Responses</th>
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<tr>
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<td>Direct Mail</td>
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<td>Other</td>
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<td>Don't know</td>
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Base: 29 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on the other media that you also used for that campaign."
Q11.b(ii): Which other radio station or stations would you have been most likely to spend that money on? (North East) 
[Multiple responses allowed]

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<th>Global customer</th>
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<tr>
<td>Metro</td>
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<tr>
<td>Real</td>
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<td>Smooth</td>
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<td>Star Radio</td>
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<td>Sun FM</td>
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<td>TFM</td>
<td>1</td>
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</tr>
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Base: 7 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."
Q11.c(i): What other advertising media would you have been most likely to spend that money on? (North East) [Single response, prompted question]

Base: 26 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on different media to those that you used for that campaign."
Q11.c(ii): Which other radio station or stations would you have been most likely to spend that money on? (North East) [Multiple responses allowed]

Base: 10 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."
Combined Q11.a/b(i)/c(i): If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (North East) [Multiple responses allowed, prompted question]

Base: 64 respondents. Results calculated by aggregating answers to questions 11(a) (b) and (c). All percentages calculated with a base of the total number of respondents in that area. Note that flow of questions allowed respondents to choose multiple options (resulting in more options being chosen than the number of respondents). To ensure percentages summed to 100%, each respondent was given a total “weight” of 1. Where a respondent chose multiple options those options were then appropriately weighted such that the respondent was given a total weight of 1 (e.g. a respondent choosing two alternative radio stations would have a weight of one half given to each in the final results)
Q12.a/b/c: If the cost of advertising on [Insert Global/RSL stations identified at Q8] increased by 5/10/15% how would that most likely have affected your advertising spend for your last campaign on [Insert Global/RSL stations identified at Q8]? (North East) [Single response, prompted]

- Switch the majority of my spend away: 27%, 56%, 72%
- Switch a proportion of my spend away: 17%, 17%
- Continue advertising but with less airtime for the same budget: 39%, 16%
- Continue advertising and pay the additional amount: 9%, 3%
- Continue advertising but with less airtime for the same budget: 9%
- Don't know: 8%, 8%

Base: 64 respondents. Question proceeded by the introduction “I would now like to ask you some general questions about the cost of advertising on [Insert Global/RSL stations identified at Q8].”
East Midlands results
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? (East Midlands) [Multiple responses allowed, prompted question]

Base: 55 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? (East Midlands)

[Single response, prompted question]

<table>
<thead>
<tr>
<th>Media</th>
<th>Very important</th>
<th>Somewhat important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>20%</td>
<td>80%</td>
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<tr>
<td>Coupon</td>
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<td>36%</td>
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<tr>
<td>Direct Mail</td>
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<td>59%</td>
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<tr>
<td>Directories</td>
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<td>53%</td>
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<tr>
<td>Local press</td>
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<tr>
<td>Magazines</td>
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<td>72%</td>
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<tr>
<td>Posters and outdoor media</td>
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<tr>
<td>Radio</td>
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<td>Trade sites</td>
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<tr>
<td>Other</td>
<td>33%</td>
<td>67%</td>
</tr>
</tbody>
</table>

Base: 55 respondents.
Q4: And what other types of media, if any, did you consider using in 2011 in addition to those that you have told me about? (East Midlands)

[Multiple responses, prompted answer. Respondents allowed to not choose any options]

Base: 55 respondents.
Q6: What are your campaign objectives in using radio? (East Midlands) [Multiple responses allowed, prompted question]

- To promote general brand awareness: 71%
- To sell/market a specific product: 65%
- To promote a particular sale, launch or event: 65%
- To encourage customers to visit a website: 69%
- To encourage customers to visit a local store: 49%
- To communicate a not for profit message: 38%
- Other: 4%

Base: 55 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? (East Midlands)

[Multiple responses, prompted answer. Respondents allowed to not choose any options]

- Cinema: 24%
- Coupon: 11%
- Direct Mail: 11%
- Directories: 11%
- Local press: 62%
- Magazines: 33%
- Posters and outdoor media: 47%
- Search engines: 45%
- Social media: 42%
- Trade sites: 16%
- TV: 36%
- None of the above: 9%
- Other: 7%
- Don't know: 9%

Base: 55 respondents.
Q9: For the last campaign where you advertised on [Insert Global/RSL stations identified at Q8], which other media, if any, did you also consider using at the time? (East Midlands) [Multiple responses, prompted answer. Respondents allowed to not choose any options]

Base: 55 respondents.
Q10: And what media did you end up using in addition to [Insert Global/RSL stations identified at Q8] for that campaign (if any)? (East Midlands)

[multiple responses allowed, prompted question]

Base: 55 respondents.
Q11.a: If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (East Midlands) [Multiple responses allowed, prompted question]

- Increase my advertising spend on the other media that I also used for that campaign: 49%
- Increase my advertising spend on different media to those that I used for that campaign: 47%
- I wouldn't have spent the money at all, i.e. I would have reduced my overall campaign spend: 29%
- Don't know: 5%

Base: 55 respondents. Question proceeded by the introduction “I would now like you to think back to the time when you were planning how to allocate your media budget for the last campaign where you used [Insert Global/RSL stations identified at Q8].”
Q11.b(i): What other advertising media would you have been most likely to spend that money on? (East Midlands) [Single response, prompted question]

Base: 27 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on the other media that you also used for that campaign."
Q11.b(ii): Which other radio station or stations would you have been most likely to spend that money on? (East Midlands) [Multiple responses allowed]

Base: 7 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."
Q11.c(i): What other advertising media would you have been most likely to spend that money on? (East Midlands) [Single response, prompted question]

Base: 26 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on different media to those that you used for that campaign."
Q11.c(ii): Which other radio station or stations would you have been most likely to spend that money on? (East Midlands) [Multiple responses allowed]

Base: 5 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."
Combined Q11.a/b(i)/c(i): If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (East Midlands) [Multiple responses allowed, prompted question]

Base: 55 respondents. Results calculated by aggregating answers to questions 11(a) (b) and (c). All percentages calculated with a base of the total number of respondents in that area. Note that flow of questions allowed respondents to choose multiple options (resulting in more options being chosen than the number of respondents). To ensure percentages summed to 100%, each respondent was given a total “weight” of 1. Where a respondent chose multiple options those options were then appropriately weighted such that the respondent was given a total weight of 1 (e.g. a respondent choosing two alternative radio stations would have a weight of one half given to each in the final results)
Q12.a/b/c: If the cost of advertising on [Insert Global/RSL stations identified at Q8] increased by 5/10/15% how would that most likely have affected your advertising spend for your last campaign on [Insert Global/RSL stations identified at Q8]? (East Midlands) [Single response, prompted]

Base: 55 respondents. Question proceeded by the introduction “I would now like to ask you some general questions about the cost of advertising on [Insert Global/RSL stations identified at Q8].”
West Midlands results
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? (West Midlands) [Multiple responses allowed, prompted question]

Base: 50 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? (West Midlands)
[Single response, prompted question]

<table>
<thead>
<tr>
<th>Media</th>
<th>Very important</th>
<th>Somewhat important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Coupon</td>
<td>0%</td>
<td>50%</td>
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<td>Direct Mail</td>
<td>31%</td>
<td>62%</td>
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<td>Directories</td>
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<td>Magazines</td>
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<td>Posters and outdoor media</td>
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<td>Radio</td>
<td>30%</td>
<td>65%</td>
</tr>
<tr>
<td>Search engines</td>
<td>24%</td>
<td>59%</td>
</tr>
<tr>
<td>Social media</td>
<td>29%</td>
<td>51%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>29%</td>
<td>53%</td>
</tr>
<tr>
<td>TV</td>
<td>33%</td>
<td>56%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>100%</td>
</tr>
</tbody>
</table>

Base: 50 respondents.
Q4: And what other types of media, if any, did you consider using in 2011 in addition to those that you have told me about? (West Midlands) [Multiple responses, prompted answer. Respondents allowed to not choose any options]

Base: 50 respondents.
Q6: What are your campaign objectives in using radio? (West Midlands)  
[Multiple responses allowed, prompted question]

To promote general brand awareness: 76%
To sell/market a specific product: 68%
To promote a particular sale, launch or event: 56%
To encourage customers to visit a website: 62%
To encourage customers to visit a local store: 44%
To communicate a not for profit message: 28%
Other: 4%

Base: 50 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? (West Midlands)

[Multiple responses, prompted answer. Respondents allowed to not choose any options]

- Cinema: 16%
- Coupon: 8%
- Direct Mail: 42%
- Directories: 12%
- Local press: 62%
- Magazines: 38%
- Posters and outdoor media: 46%
- Search engines: 40%
- Social media: 50%
- Trade sites: 22%
- TV: 38%
- None of the above: 6%
- Other: 8%
- Don't know: 6%

Base: 50 respondents.
Q9: For the last campaign where you advertised on [Insert Global/RSL stations identified at Q8], which other media, if any, did you also consider using at the time? (West Midlands) [Multiple responses, prompted answer. Respondents allowed to not choose any options]

- Cinema: 8%
- Coupon: 4%
- Direct Mail: 30%
- Directories: 10%
- Local press: 54%
- Magazines: 40%
- Posters and outdoor media: 48%
- Other radio: 50%
- Search engines: 36%
- Social media: 42%
- Trade sites: 10%
- TV: 16%
- None of the above: 10%
- Other: 10%
- Don't know: 4%

Base: 50 respondents.
Q10: And what media did you end up using in addition to [Insert Global/RSL stations identified at Q8] for that campaign (if any)? (West Midlands) [multiple responses allowed, prompted question]

Base: 50 respondents.
Q11.a: If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (West Midlands) [Multiple responses allowed, prompted question]

- Increase my advertising spend on the other media that I also used for that campaign: 56%
- Increase my advertising spend on different media to those that I used for that campaign: 30%
- I wouldn’t have spent the money at all, i.e. I would have reduced my overall campaign spend: 38%
- Don’t know: 4%

Base: 50 respondents. Question proceeded by the introduction “I would now like you to think back to the time when you were planning how to allocate your media budget for the last campaign where you used [Insert Global/RSL stations identified at Q8].”
Q11.b(i): What other advertising media would you have been most likely to spend that money on? (West Midlands) [Single response, prompted question]

- Cinema: 0
- Coupon: 0
- Direct Mail: 0
- Directories: 0
- Local press: 5
- Magazines: 0
- Posters and outdoor media: 2
- Other radio: 6
- Search engines: 2
- Social media: 1
- Trade sites: 0
- TV: 2
- None of the above: 2
- Other: 0
- Don't know: 10

Base: 28 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on the other media that you also used for that campaign."
Q11.b(ii): Which other radio station or stations would you have been most likely to spend that money on? (West Midlands) [Multiple responses allowed]

Base: 6 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."
Q11.c(i): What other advertising media would you have been most likely to spend that money on? (West Midlands) [Single response, prompted question]

Base: 15 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on different media to those that you used for that campaign."
Q11.c(ii): Which other radio station or stations would you have been most likely to spend that money on? (West Midlands) [Multiple responses allowed]

Base: 7 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."
Combined: Q11.a/b(i)/c(i): If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (West Midlands) [Multiple responses allowed, prompted question]

Base: 50 respondents. Results calculated by aggregating answers to questions 11(a) (b) and (c). All percentages calculated with a base of the total number of respondents in that area. Note that flow of questions allowed respondents to choose multiple options (resulting in more options being chosen than the number of respondents). To ensure percentages summed to 100%, each respondent was given a total “weight” of 1. Where a respondent chose multiple options those options were then appropriately weighted such that the respondent was given a total weight of 1 (e.g. a respondent choosing two alternative radio stations would have a weight of one half given to each in the final results)
Q12.a/b/c: If the cost of advertising on [Insert Global/RSL stations identified at Q8] increased by 5/10/15% how would that most likely have affected your advertising spend for your last campaign on [Insert Global/RSL stations identified at Q8]? (West Midlands) [Single response, prompted]

Base: 50 respondents. Question proceeded by the introduction “I would now like to ask you some general questions about the cost of advertising on [Insert Global/RSL stations identified at Q8].”
North Wales results
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? (North Wales) [Multiple responses allowed, prompted question]

Base: 90 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? (North Wales) [Single response, prompted question]

Base: 90 respondents.
Q4: And what other types of media, if any, did you consider using in 2011 in addition to those that you have told me about? (North Wales)

[Multiple responses, prompted answer. Respondents allowed to not choose any options]

Base: 90 respondents.
Q6: What are your campaign objectives in using radio? (North Wales)
Multiple responses allowed, prompted question

- To promote general brand awareness: 76%
- To sell/market a specific product: 62%
- To promote a particular sale, launch or event: 61%
- To encourage customers to visit a website: 57%
- To encourage customers to visit a local store: 37%
- To communicate a not for profit message: 28%
- Other: 0%

Base: 90 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? (North Wales)
[Multiple responses, prompted answer. Respondents allowed to not choose any options]

- Cinema: 12%
- Coupon: 7%
- Direct Mail: 20%
- Directories: 12%
- Local press: 51%
- Magazines: 26%
- Posters and outdoor media: 34%
- Search engines: 24%
- Social media: 40%
- Trade sites: 12%
- TV: 28%
- None of the above: 14%
- Other: 12%
- Don't know: 9%

Base: 90 respondents.
Q9: For the last campaign where you advertised on [Insert Global/RSL stations identified at Q8], which other media, if any, did you also consider using at the time? (North Wales) [Multiple responses, prompted answer. Respondents allowed to not choose any options]

<table>
<thead>
<tr>
<th>Media</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>1%</td>
</tr>
<tr>
<td>Coupon</td>
<td>2%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>13%</td>
</tr>
<tr>
<td>Directories</td>
<td>8%</td>
</tr>
<tr>
<td>Local press</td>
<td>57%</td>
</tr>
<tr>
<td>Magazines</td>
<td>20%</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>27%</td>
</tr>
<tr>
<td>Other radio</td>
<td>23%</td>
</tr>
<tr>
<td>Search engines</td>
<td>18%</td>
</tr>
<tr>
<td>Social media</td>
<td>30%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>11%</td>
</tr>
<tr>
<td>TV</td>
<td>4%</td>
</tr>
<tr>
<td>None of the above</td>
<td>28%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0%</td>
</tr>
</tbody>
</table>

Base: 90 respondents.
Q10: And what media did you end up using in addition to [Insert Global/RSL stations identified at Q8] for that campaign (if any)? (North Wales) [multiple responses allowed, prompted question]

Base: 90 respondents.
Q11.a: If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (North Wales) [Multiple responses allowed, prompted question]

- Increase my advertising spend on the other media that I also used for that campaign: 39%
- Increase my advertising spend on different media to those that I used for that campaign: 40%
- I wouldn’t have spent the money at all, i.e. I would have reduced my overall campaign spend: 42%
- Don’t know: 2%

Base: 90 respondents. Question proceeded by the introduction “I would now like you to think back to the time when you were planning how to allocate your media budget for the last campaign where you used [Insert Global/RSL stations identified at Q8].”
Q11.b(i): What other advertising media would you have been most likely to spend that money on? (North Wales) [Single response, prompted question]

<table>
<thead>
<tr>
<th>Media</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>0</td>
</tr>
<tr>
<td>Coupon</td>
<td>0</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>0</td>
</tr>
<tr>
<td>Directories</td>
<td>0</td>
</tr>
<tr>
<td>Local press</td>
<td>11</td>
</tr>
<tr>
<td>Magazines</td>
<td>0</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>3</td>
</tr>
<tr>
<td>Other radio</td>
<td>4</td>
</tr>
<tr>
<td>Search engines</td>
<td>1</td>
</tr>
<tr>
<td>Social media</td>
<td>0</td>
</tr>
<tr>
<td>Trade sites</td>
<td>1</td>
</tr>
<tr>
<td>TV</td>
<td>0</td>
</tr>
<tr>
<td>None of the above</td>
<td>0</td>
</tr>
<tr>
<td>Other</td>
<td>0</td>
</tr>
<tr>
<td>Don’t know</td>
<td>15</td>
</tr>
</tbody>
</table>

Base: 35 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on the other media that you also used for that campaign."
Q11.b(ii): Which other radio station or stations would you have been most likely to spend that money on? (North Wales) [Multiple responses allowed]

Base: 4 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."
Q11.c(i): What other advertising media would you have been most likely to spend that money on? (North Wales) [Single response, prompted question]

Base: 36 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on different media to those that you used for that campaign."
Q11.c(ii): Which other radio station or stations would you have been most likely to spend that money on? (North Wales) [Multiple responses allowed]

Base: 10 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."
Combined: Q11.a/b(i)/c(i): If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (North Wales) [Multiple responses allowed, prompted question]

- Don't know (answer to Q11a) 2%
- I wouldn't have spent the money at all 42%
- Other radio 11%
- Posters and outdoor media 3%
- Local press 14%
- Magazines 3%
- Directories 0%
- Direct Mail 1%
- Coupon 0%
- Cinema 1%

Base: 90 respondents. Results calculated by aggregating answers to questions 11(a) (b) and (c). All percentages calculated with a base of the total number of respondents in that area. Note that flow of questions allowed respondents to choose multiple options (resulting in more options being chosen than the number of respondents). To ensure percentages summed to 100%, each respondent was given a total “weight” of 1. Where a respondent chose multiple options those options were then appropriately weighted such that the respondent was given a total weight of 1 (e.g. a respondent choosing two alternative radio stations would have a weight of one half given to each in the final results)
Q12.a/b/c: If the cost of advertising on [Insert Global/RSL stations identified at Q8] increased by 5/10/15% how would that most likely have affected your advertising spend for your last campaign on [Insert Global/RSL stations identified at Q8]? (North Wales) [Single response, prompted]

Base: 90 respondents. Question proceeded by the introduction “I would now like to ask you some general questions about the cost of advertising on [Insert Global/RSL stations identified at Q8].”
South Wales results
Q2: Thinking about your total advertising spend in 2011, what did you spend that budget on? (South Wales) [Multiple responses allowed, prompted question]

Base: 93 respondents.
Q3: You have told me that you used [insert options specified at 2]. How important was cost in deciding which media to use? (South Wales) [Single response, prompted question]

Base: 93 respondents.
Q4: And what other types of media, if any, did you consider using in 2011 in addition to those that you have told me about? (South Wales)
[Multiple responses, prompted answer. Respondents allowed to not choose any options]

<table>
<thead>
<tr>
<th>Media Type</th>
<th>Actually Used</th>
<th>Considered using</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>Coupon</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>Direct Mail</td>
<td>51%</td>
<td>8%</td>
</tr>
<tr>
<td>Directories</td>
<td>43%</td>
<td>5%</td>
</tr>
<tr>
<td>Local press</td>
<td>85%</td>
<td>3%</td>
</tr>
<tr>
<td>Magazines</td>
<td>61%</td>
<td>4%</td>
</tr>
<tr>
<td>Posters and outdoor media</td>
<td>66%</td>
<td>3%</td>
</tr>
<tr>
<td>Radio</td>
<td>98%</td>
<td>1%</td>
</tr>
<tr>
<td>Search engines</td>
<td>54%</td>
<td>6%</td>
</tr>
<tr>
<td>Social media</td>
<td>59%</td>
<td>10%</td>
</tr>
<tr>
<td>Trade sites</td>
<td>30%</td>
<td>4%</td>
</tr>
<tr>
<td>TV</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
<td>17%</td>
</tr>
<tr>
<td>Don't know</td>
<td>3%</td>
<td></td>
</tr>
</tbody>
</table>

Base: 93 respondents.
Q6: What are your campaign objectives in using radio? (South Wales) [Multiple responses allowed, prompted question]

- To promote general brand awareness: 74%
- To sell/market a specific product: 62%
- To promote a particular sale, launch or event: 68%
- To encourage customers to visit a website: 60%
- To encourage customers to visit a local store: 41%
- To communicate a not for profit message: 18%
- Other: 3%

Base: 93 respondents.
Q7: What other types of media could you use to meet the same campaign objectives as radio? (South Wales)

[Multiple responses, prompted answer. Respondents allowed to not choose any options]

- Cinema: 24%
- Coupon: 16%
- Direct Mail: 35%
- Directories: 19%
- Local press: 57%
- Magazines: 38%
- Posters and outdoor media: 40%
- Search engines: 38%
- Social media: 53%
- Trade sites: 19%
- TV: 53%
- None of the above: 10%
- Other: 10%
- Don't know: 8%

Base: 93 respondents.
Q9: For the last campaign where you advertised on [Insert Global/RSL stations identified at Q8], which other media, if any, did you also consider using at the time? (South Wales) [Multiple responses, prompted answer. Respondents allowed to not choose any options]
Q10: And what media did you end up using in addition to [Insert Global/RSL stations identified at Q8] for that campaign (if any)? (South Wales) [multiple responses allowed, prompted question]

Base: 93 respondents.
Q11.a: If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (South Wales) [Multiple responses allowed, prompted question]

- Increase my advertising spend on the other media that I also used for that campaign: 45%
- Increase my advertising spend on different media to those that I used for that campaign: 35%
- I wouldn’t have spent the money at all, i.e. I would have reduced my overall campaign spend: 34%
- Don’t know: 4%

Base: 93 respondents. Question proceeded by the introduction “I would now like you to think back to the time when you were planning how to allocate your media budget for the last campaign where you used [Insert Global/RSL stations identified at Q8].”
Q11.b(i): What other advertising media would you have been most likely to spend that money on? (South Wales) [Single response, prompted question]

Base: 42 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on the other media that you also used for that campaign."
Q11.b(ii): Which other radio station or stations would you have been most likely to spend that money on? (South Wales) [Multiple responses allowed]

Base: 7 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."
Q11.c(i): What other advertising media would you have been most likely to spend that money on? (South Wales) [Single response, prompted question]

Base: 33 respondents. Question proceeded by the introduction "You have said that you would increase your advertising spend on different media to those that you used for that campaign."
Q11.c(ii): Which other radio station or stations would you have been most likely to spend that money on? (South Wales) [Multiple responses allowed]

Base: 15 respondents. Question proceeded by the introduction "You have said that you would have spent the money that you were going to spend on [Insert Global/RSL stations identified at Q8] on other radio."

Bay Radio: 1
Bridge FM: 2
Capital: 4
Gold: 1
Heart: 1
Kiss: 1
Kiss West 101: 1
Nation: 4
Radio...: 1
Radio Ceredigion: 1
Radio...: 1
Real: 5
Swansea Sound: 1
Wave 96.4: 1
Don't know: 2

Global customer
RSL customer
Combined Q11.a/b(i)/c(i): If you had been unable to use [Insert Global/RSL stations identified at Q8] in that period (for example if there had been no airtime slots available at all), what would you have done with the budget you would have spent on [that station/those stations]? (South Wales) [Multiple responses allowed, prompted question]

Base: 93 respondents. Results calculated by aggregating answers to questions 11(a) (b) and (c). All percentages calculated with a base of the total number of respondents in that area. Note that flow of questions allowed respondents to choose multiple options (resulting in more options being chosen than the number of respondents). To ensure percentages summed to 100%, each respondent was given a total “weight” of 1. Where a respondent chose multiple options those options were then appropriately weighted such that the respondent was given a total weight of 1 (e.g. a respondent choosing two alternative radio stations would have a weight of one half given to each in the final results)
Q12.a/b/c: If the cost of advertising on [Insert Global/RSL stations identified at Q8] increased by 5/10/15% how would that most likely have affected your advertising spend for your last campaign on [Insert Global/RSL stations identified at Q8]? (South Wales) [Single response, prompted]

Base: 93 respondents. Question proceeded by the introduction “I would now like to ask you some general questions about the cost of advertising on [Insert Global/RSL stations identified at Q8].”