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# WE THINK POPULAR.



MEDIA GROUP

# BAUER RADIO TOTAL PORTFOLIO

RAJAR Q4 2012

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# BAUER RADIO TOTAL PORTFOLIO

- 13.3m listeners
- Our Place Portfolio stations are No.1 in 21 out of 21 markets
- Smash Hits, The Hits & Heat are all in the top 10 digital stations
- Average age 38



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# LISTENER PROFILE

- 46% of listeners are male, 54% are female
- 51% of listeners are ABC1, 49% C2DE
- 76% of listeners are Main Shoppers
- Has a commercial Share of 25.0%

**BAUER RADIO TOTAL  
PORTFOLIO REACHES  
13,279,000 ADULTS 15+  
EVERY WEEK**

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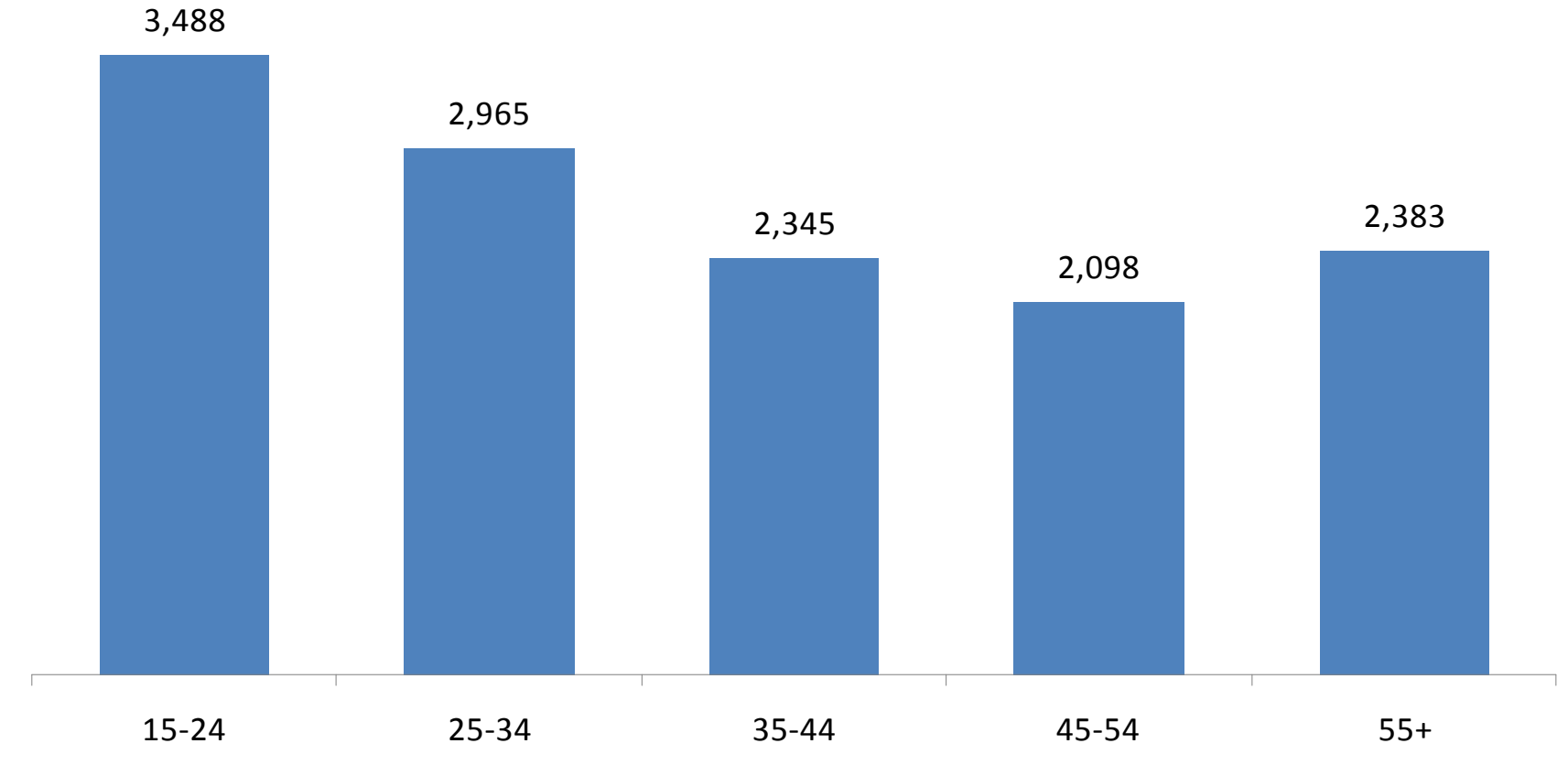
Source: RAJAR, Bauer Radio Total Portfolio TSA, 6 Months PE Dec 12



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# REACH BY AGE BREAK

WEEKLY REACH (000)



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Source: RAJAR, Bauer Radio Total Portfolio TSA, 6 Months PE Dec 12



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# THE BAUER PLACE PORTFOLIO

- 8.7m listeners
- No.1 in 21 out of 21 markets
- 18% higher reach than our nearest competitor
- 41% more listening hours
- Average age 42

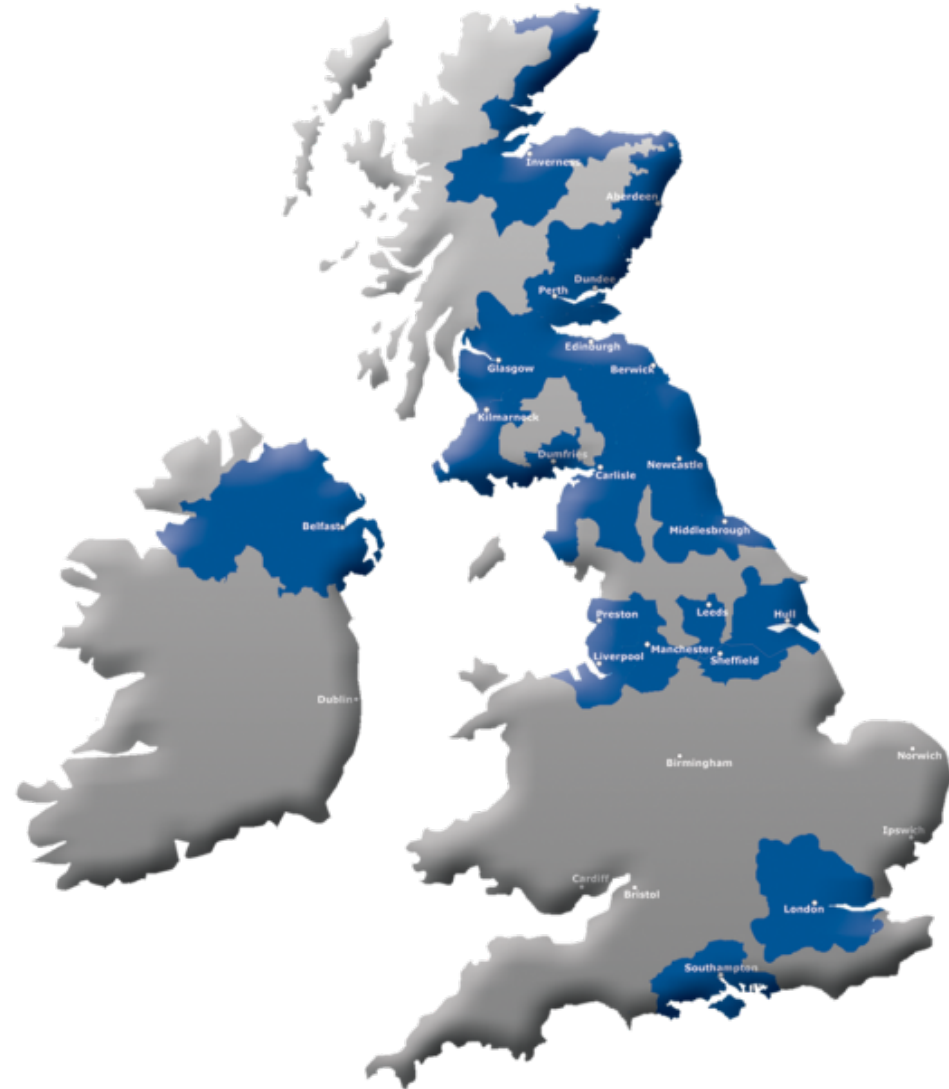


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# BAUER PLACE PORTFOLIO REACH

Bauer Place Portfolio reaches 8.7 million adults across the UK

- Heart FM (UK): 7.4 million
- Capital FM (UK): 6.8 Million
- Classic FM: 5.4 Million
- Total Smooth Radio UK: 3.8 Million
- talkSPORT: 3.0 Million
- Total Absolute Radio Network: 3.1 Million



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# AND WE CONNECT WITH THEM FOR LONGER

Bauer Place Portfolio has average hours of 8.3

- Heart FM (UK): 6.9 hours
- Capital FM (UK): 5.9 hours
- Classic FM: 6.7 hours
- Total Smooth Radio UK: 8.0 hours
- talkSPORT: 6.4 hours
- Total Absolute Radio Network: 6.9 hours



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Source: RAJAR, Bauer Place Portfolio TSA, 6 Months PE Ded 12



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# MADE UP OF THE BEST LOCAL BRANDS



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# FEEL INFORMED

BAUER PLACE PORTFOLIO + 40%

# FEEL INVOLVED

BAUER PLACE PORTFOLIO + 30%

# FEEL CONNECTED

BAUER PLACE PORTFOLIO + 32%

VS. AVERAGE OF 4 MAIN COMPETITORS

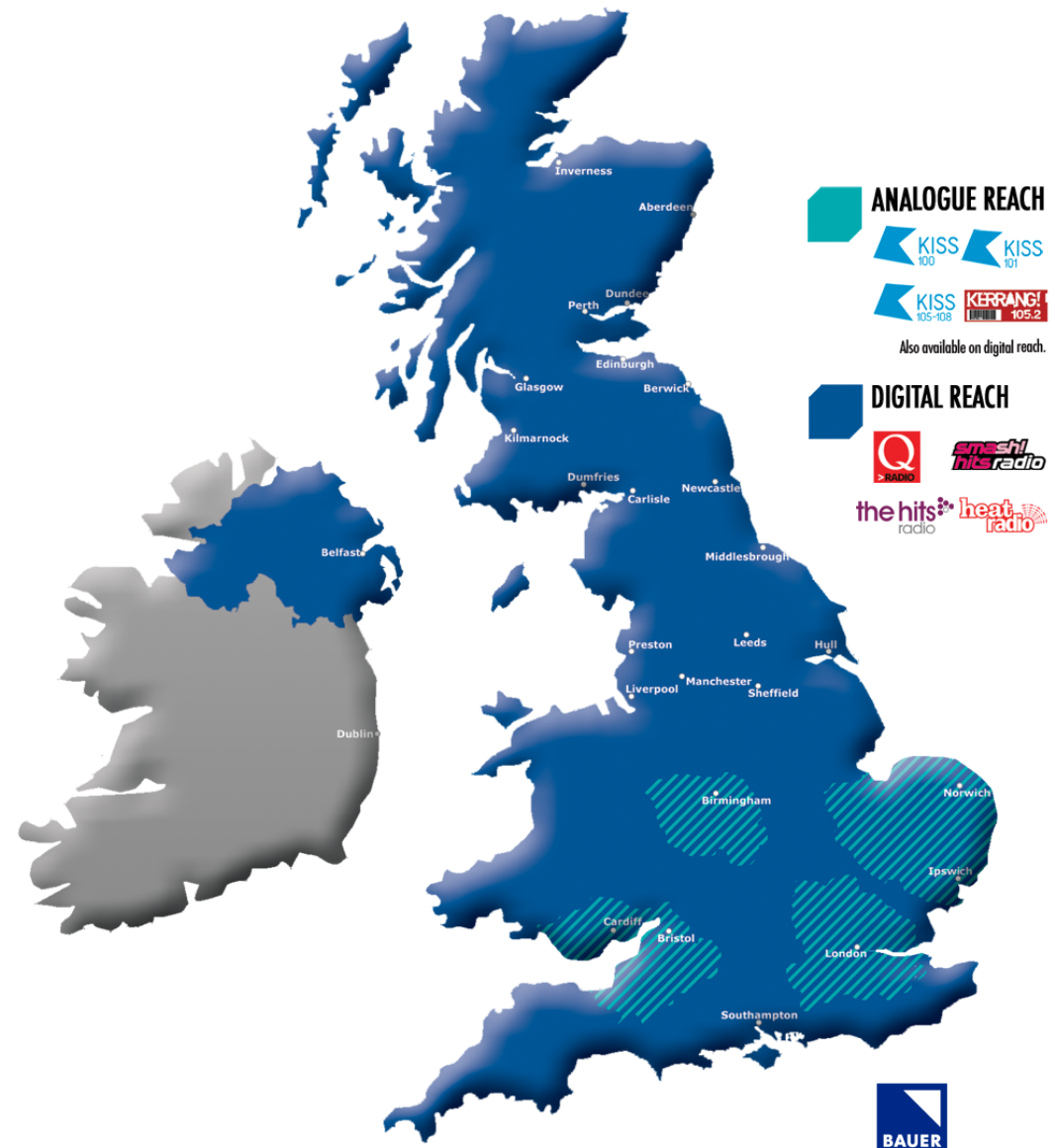
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# THE BAUER PASSION PORTFOLIO

- 6.5m listeners
- Average Age 31
- Smash Hits reaches 1 million adults
- Kiss UK & Kerrang! UK connect with listeners through the music they play



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# WHAT DOES MUSIC MEAN TO THEM?

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# THE MOST IMPORTANT THING IN THE WORLD?

- Family 95%
- **Music 94%**
- Friends 94%
- Internet 87%
- Mobile phone 85%
- **Radio 71%**
- TV 66%



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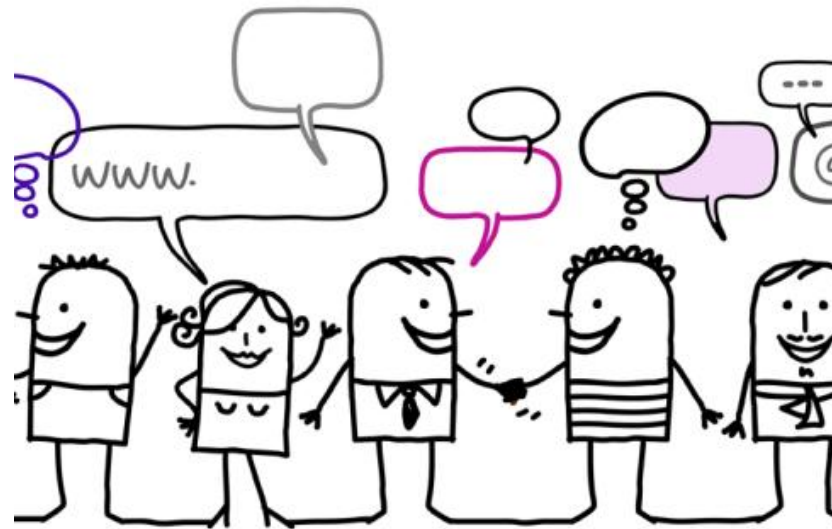
Source: Bauer Passion Portfolio fans



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# HOW DO YOU FIND OUT ABOUT NEW MUSIC?

- Radio 87%
- TV Music Channels 65%
- Friends 62%
- Internet video sites 57%
- Social Networking 54%
- TV Adverts 26%



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Source: Bauer Passion Portfolio fans



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# WHOSE OPINION DO YOU TRUST MOST WHEN IT COMES TO NEW MUSIC?

- Radio 48%
- Friends 21%
- TV Music Channels 11%
- Internet video sites 5%
- Love or like station 96%



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Source: Bauer Passion Portfolio fans



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# BETTER FOR ADS

Ads music and news work really well together

77%

A glowing red 'ON AIR' sign in a dark studio setting. The sign is illuminated from within, casting a warm red glow. The background is dark, with a vertical light strip visible on the left side of the sign.

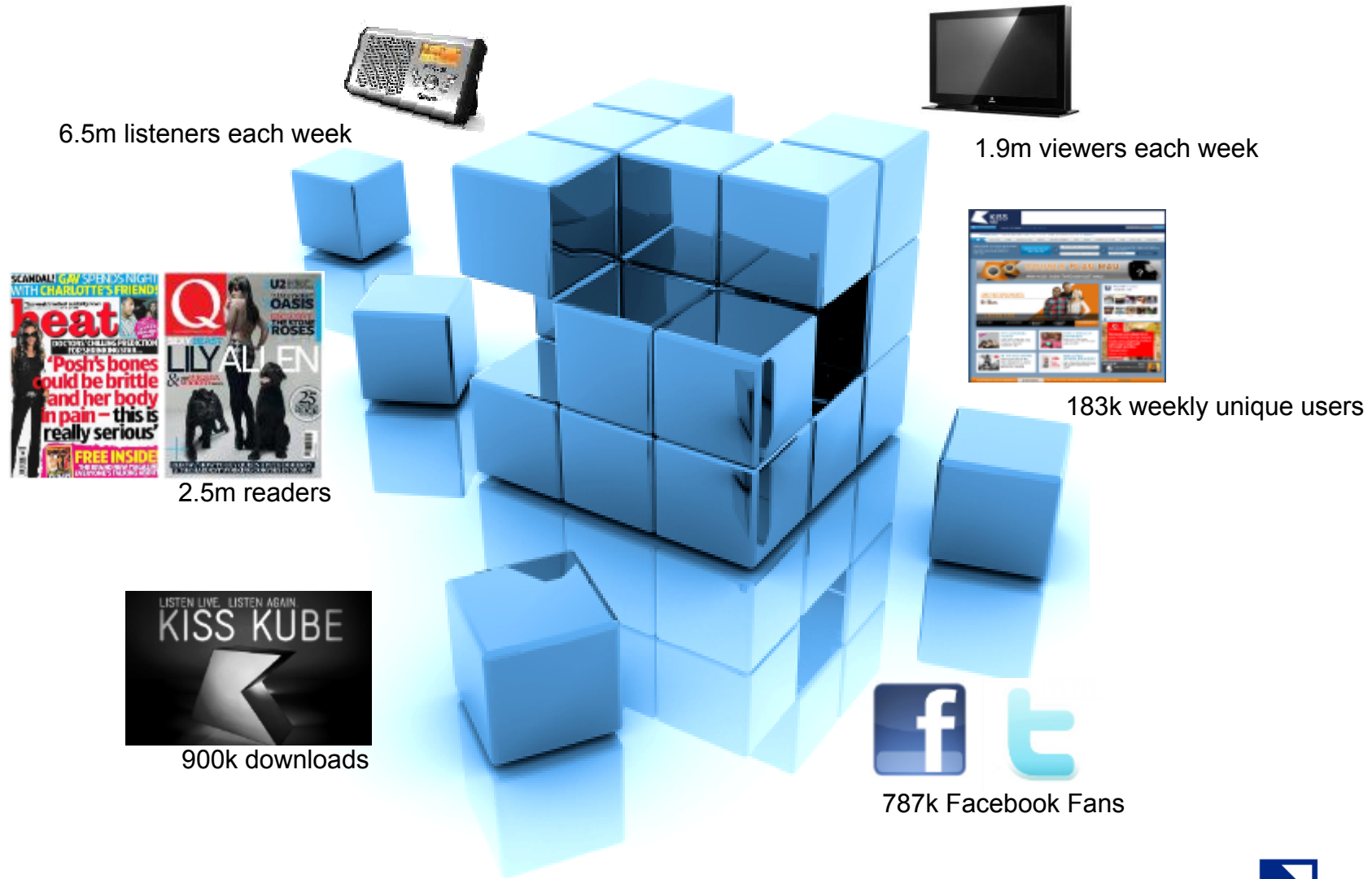
**WE THINK POPULAR.**

Source: Bauer Passion Portfolio fans



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# 12M CROSS PLATFORM CONNECTIONS



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# BAUER RADIO TOTAL PORTFOLIO REACHING 13.3 MILLION ADULTS EVERY WEEK



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POPULAR.**



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# RADIO FORTH

RAJAR Q4 2012

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**Forth** ONE  
97.3

**FORTH2**  
1528 am



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# RADIO FORTH

- Radio Forth now delivers a market share of 19.8%
- Forth One now reaches 346,000 listeners each week and almost 3 million hours in total
- Forth 2 now delivers 78,000 listeners each week and 784,000 hours
- Forth One is market leader across all radio with a market share of 15.6%
- Forth One delivers 167,000 more listeners than Real Radio
- Forth One delivers 166,000 more listeners than Capital FM
- With 244,000 listeners, Boogie In The Morning dominates the airwaves at Breakfast in Edinburgh and the east.
- Boogie In The Morning has 144,000 more listeners & 542,000 more hours than Real Radio, its closest commercial competitor
- Boogie In The Morning leads Breakfast listening across Edinburgh, The Lothians & Fife with a market share of 20.1%

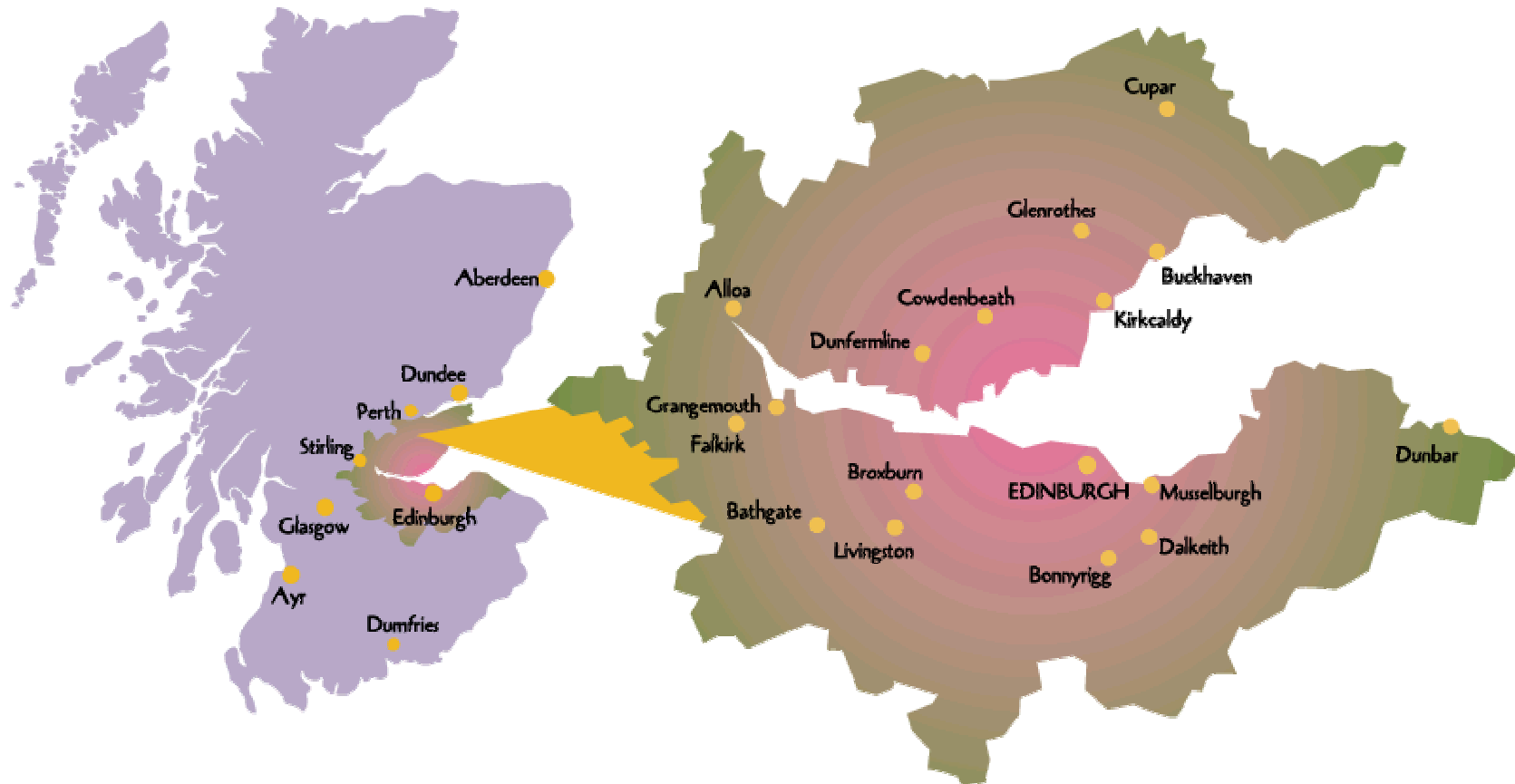
**WE THINK POPULAR.**

source: RAJAR 2012 Q4 based on the Forth 1TSA Radio Forth combined 1 and 2



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# THE TRANSMISSION AREA



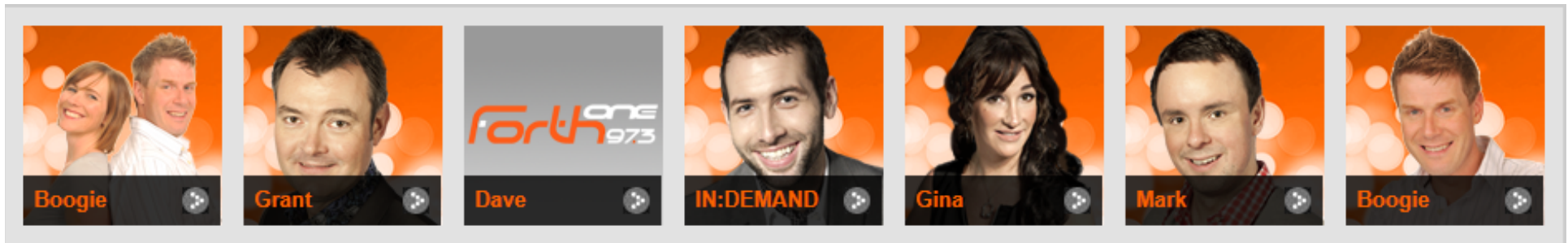
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N.B. Radio Forth is made up of Forth 1 and Forth 2



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# FORTH ONE WEEKDAY SCHEDULE



- Boogie In The Morning 6am-10am
- Grant Stott with Mid Morning 10am-2pm
- The 2 O'clock Take Over 2pm-3pm
- Dave Connor at Drivetime 3pm-7pm
- IN: Demand with Romeo 7pm-10pm
- Late Night with Gina McKie 10pm-1am



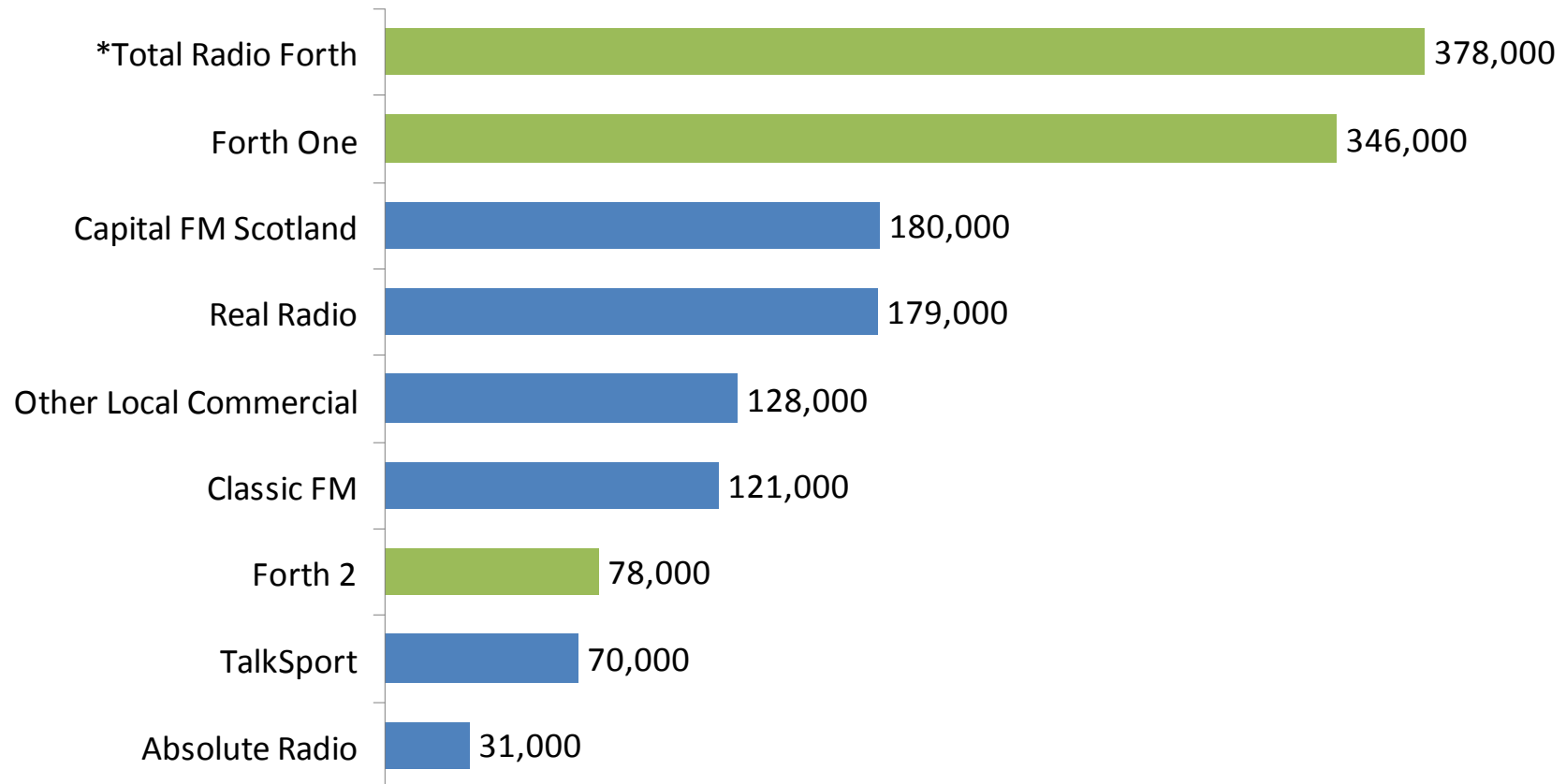
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# COMPETITORS

## WEEKLY REACH



### WE THINK POPULAR.

Source: RAJAR 2012 Q4 based on the Forth 1 TSA Radio Forth is the combined figures of Forth 1 and 2 \*some stations do not cover the whole of the TSA



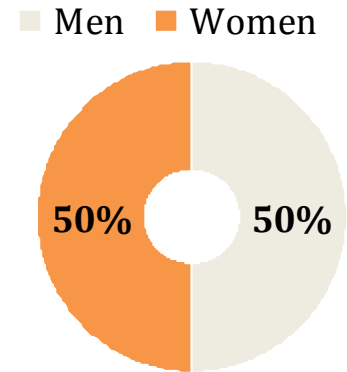
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# RADIO FORTH

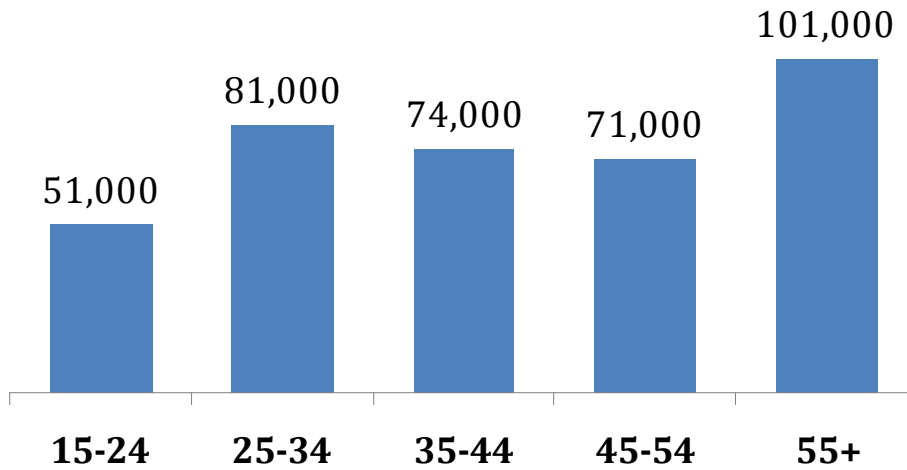
378,000 WEEKLY LISTENERS

**RADIO FORTH REACHES...**

- 201,000 ABC1 LISTENERS
- 177,000 C2DE LISTENERS
- 285,000 MAIN SHOPPERS



**WEEKLY REACH**



**WE THINK POPULAR.**

Source: RAJAR 2012 Q4 based on the Forth 1 TSA



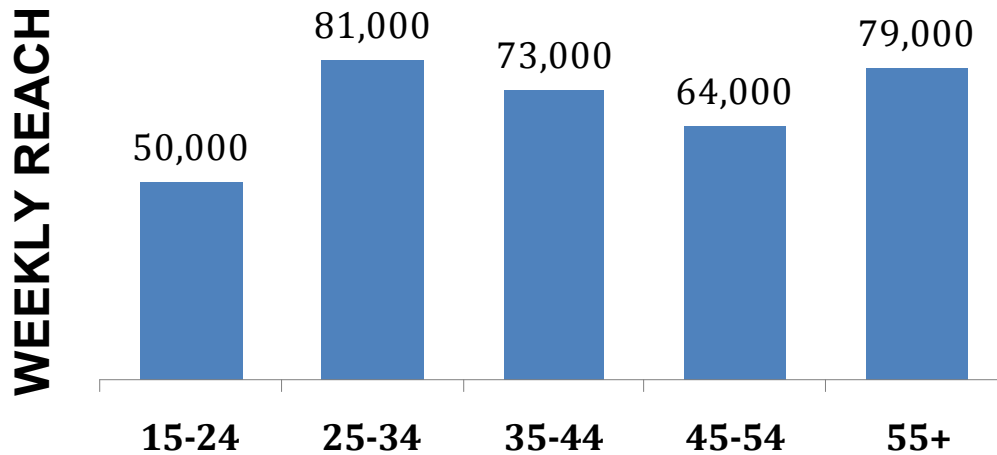
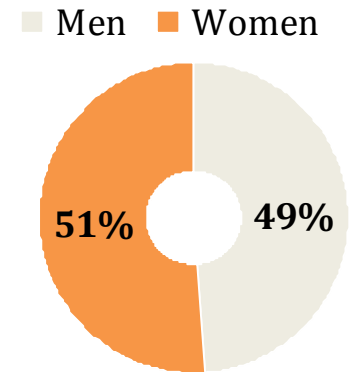
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# FORTH ONE

346,000 WEEKLY LISTENERS

**RADIO FORTH REACHES...**

- 183,000 ABC1 LISTENERS
- 163,000 C2DE LISTENERS
- 258,000 MAIN SHOPPERS



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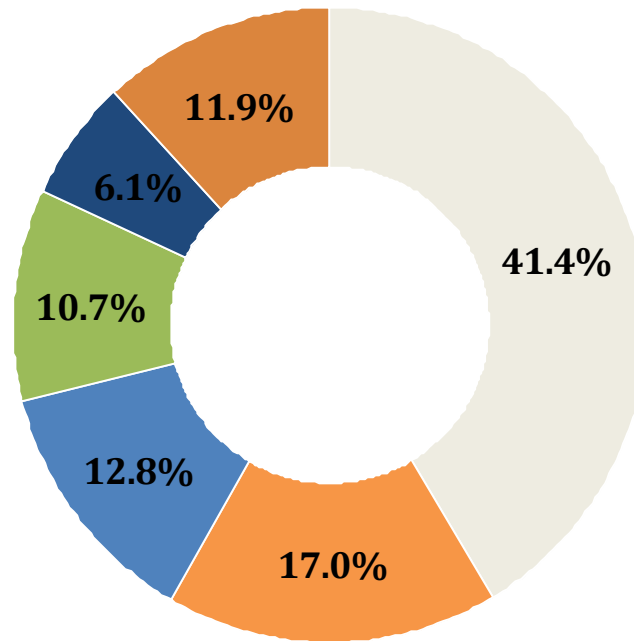
Source: RAJAR 2012 Q4 based on the Forth 1 TSA



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# COMMERCIAL MARKET SHARE

FORTH ONE TSA MARKET SHARE  
ALL COMMERCIAL RADIO LISTENING



■ Total Radio Forth ■ Real Radio (Scotland)\* ■ Capital Scotland ■ Classic FM ■ talkSPORT ■ Other Local Commercial

**WE THINK POPULAR.**

Source: RAJAR 2012 Q4 based on the Forth 1 TSA Radio Forth is the combined figures of Forth 1 and 2 \*some stations do not cover the whole of the TSA



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# RADIO CLYDE

RAJAR Q4 2012

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# RADIO CLYDE

- Clyde 1's core audience is 25-44 year olds, playing more hit music; bringing the biggest music events to Glasgow and providing unrivalled news & sports coverage and local information
- Clyde 2's core audience is 35-54 year olds with an eclectic mix of music ranging from new releases and the best of the current chart, right through to great songs from years gone by
- In terms of weekly Reach; Clyde 1 is the market leading radio station, in Glasgow and the West
- Radio Clyde reaches out to more listeners in Glasgow and the West than any other commercial broadcasting company
- Listeners to Radio Clyde are tuning-in on average for 8.3 hours across the week
- 84% of Radio Clyde's listeners, a massive 604,000, are classed as the main shopper in their household and therefore control the purse-strings



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Source: RAJAR 2012 Q4 based on the Clyde 1TSA Radio Clyde combined 1 and 2



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# THE TRANSMISSION AREA



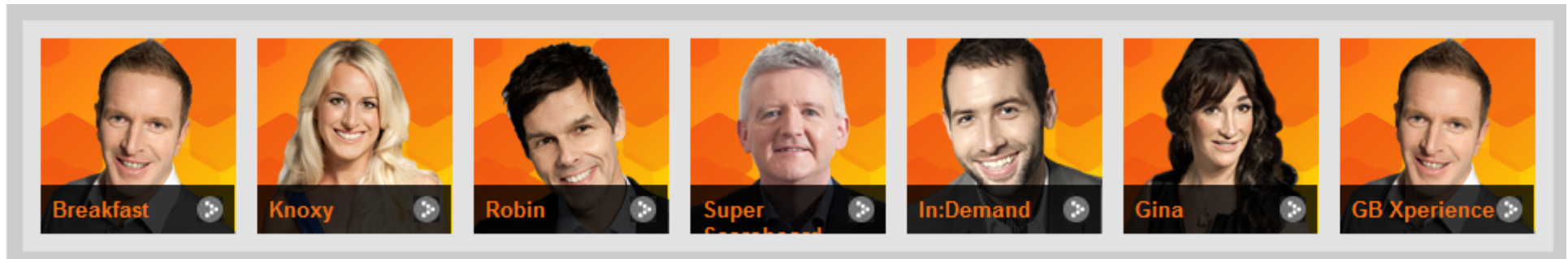
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N.B. Radio Clyde is made up of Clyde 1 and Clyde 2



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# CLYDE 1 WEEKDAY SCHEDULE



- Bowie at Breakfast 6am-10am
- Knoxy 10am-2pm
- Robin Galloway 2pm-6pm
- Super Scoreboard 6pm-8pm
- IN:Demand with Romeo 8pm-10pm
- Late Night with Gina McKie 10pm-1am



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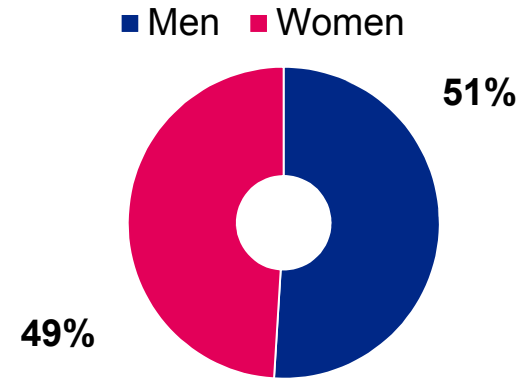
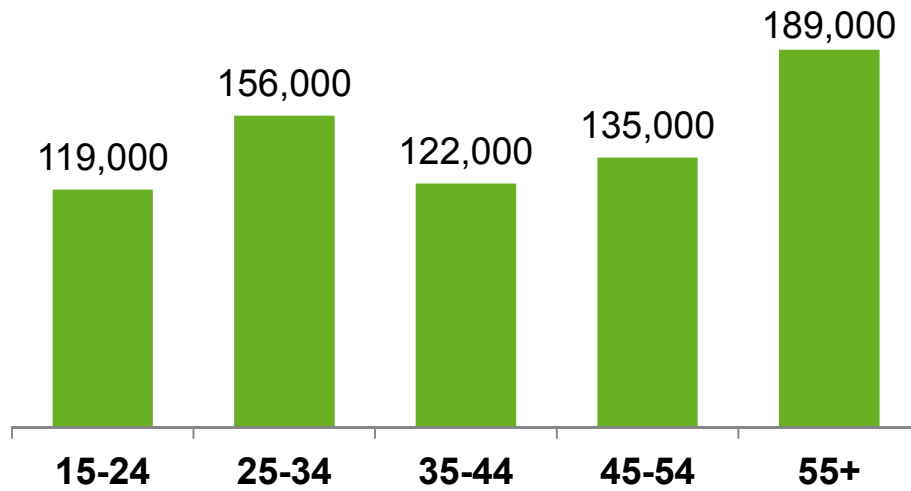
# TOTAL RADIO CLYDE

722,000 WEEKLY LISTENERS

**TOTAL CLYDE REACHES...**

- 350,000 ABC1 LISTENERS
- 371,000 C2DE LISTENERS
- 604,000 MAIN SHOPPERS

WEEKLY REACH



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Source: RAJAR 2012 Q4 based on the Clyde1 TSA Radio Clyde is the combined figures of Clyde 1 & Clyde 2



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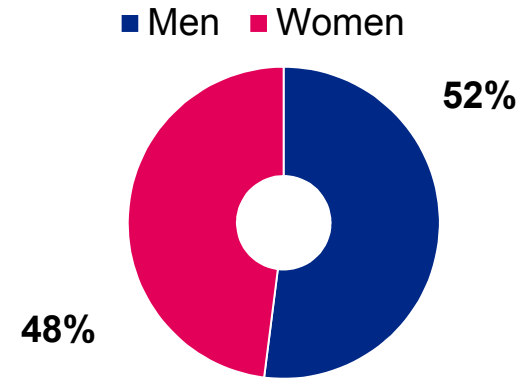
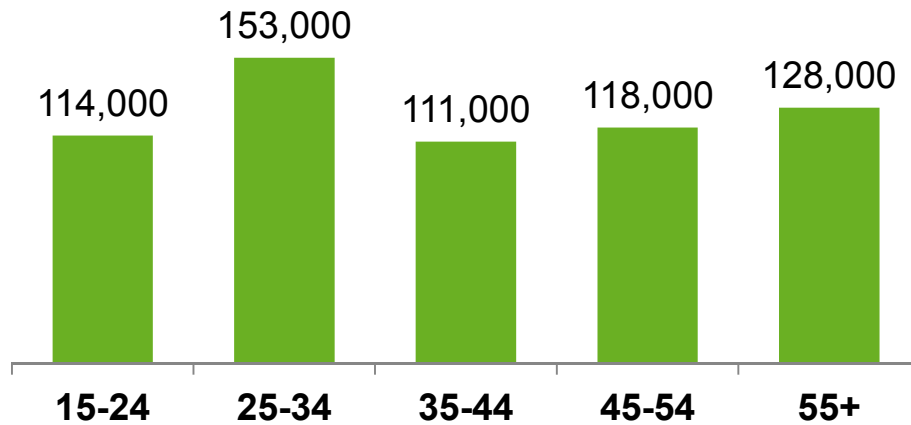
# CLYDE 1

624,000 WEEKLY LISTENERS

## CLYDE 1 REACHES...

- 297,000 ABC1 LISTENERS
- 327,000 C2DE LISTENERS
- 519,000 MAIN SHOPPERS

WEEKLY REACH



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Source: RAJAR 2012 Q4 based on the Clyde 1 TSA



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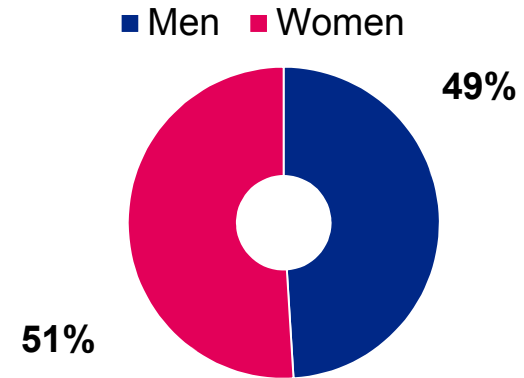
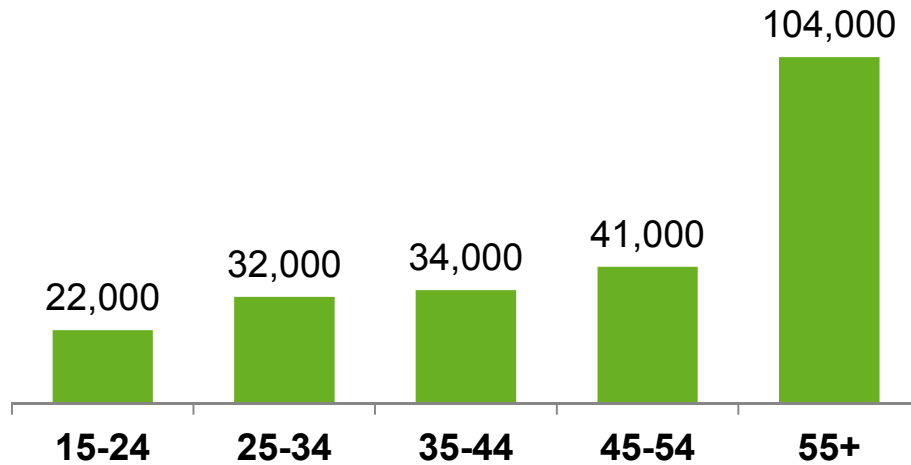
# CLYDE 2

233,000 WEEKLY LISTENERS

**TOTAL CLYDE REACHES...**

- 105,000 ABC1 LISTENERS
- 128,000 C2DE LISTENERS
- 207,000 MAIN SHOPPERS

WEEKLY REACH



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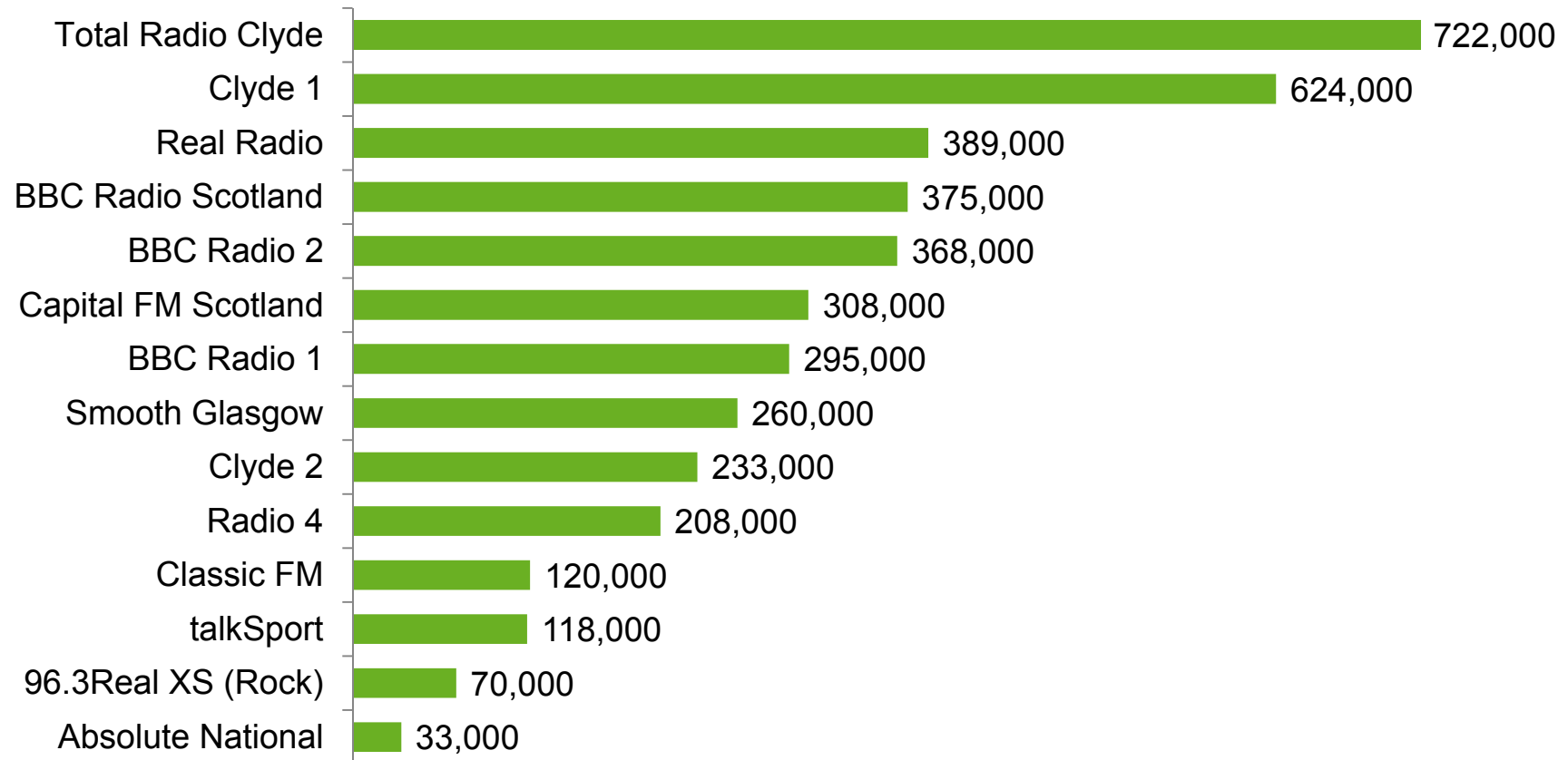
Source: RAJAR 2012 Q4 based on the Clyde 1 TSA



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# COMPETITORS

## WEEKLY REACH



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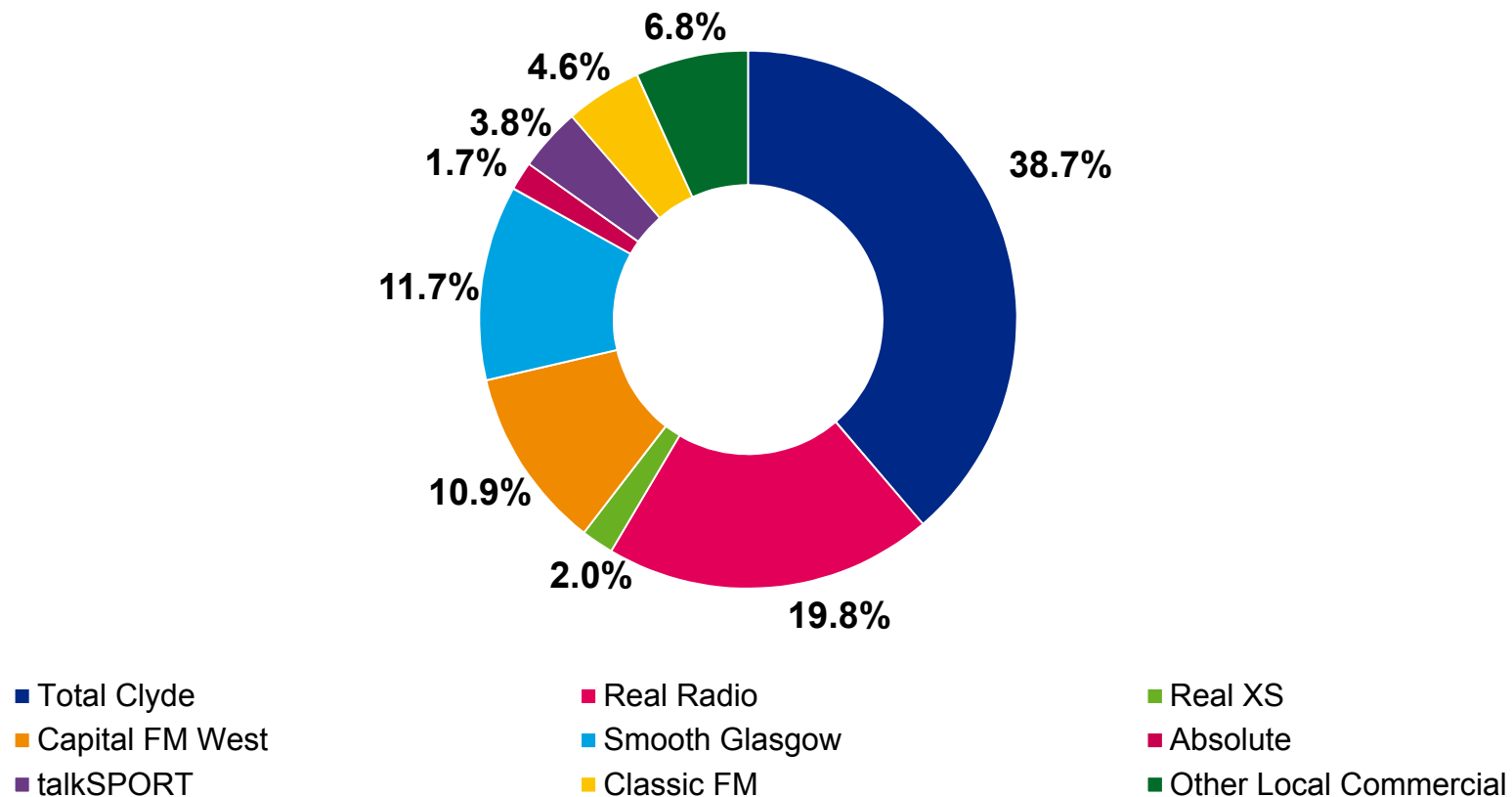
Source: RAJAR 2012 Q4 based on the Clyde 1 TSA Radio Clyde is the combined figures of Clyde 1 and 2 \*some stations do not cover the whole of the TSA



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# COMMERCIAL MARKET SHARE

CLYDE 1 TSA MARKET SHARE  
ALL COMMERCIAL RADIO LISTENING



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Source: RAJAR 2012 Q4 based on the Clyde 1 TSA Radio Clyde is the combined figures of Clyde 1 and 2 \*some stations do not cover the whole of the TSA



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