WE THINK POPULAR.

MEDIA GROUP
BAUER RADIO TOTAL PORTFOLIO

RAJAR Q4 2012
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

WE THINK POPULAR.

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

Source: RAJAR, Bauer Radio Total Portfolio TSA, 6 Months PE Dec 12
REACH BY AGE BREAK

WEEKLY REACH (000)

Source: RAJAR, Bauer Radio Total Portfolio TSA, 6 Months PE Dec 12
WE THINK POPULAR.
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

WE THINK POPULAR.

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

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

Source: RAJAR, Bauer Place Portfolio TSA, 6 Months PE Ded 12
MADE UP OF THE BEST LOCAL BRANDS

* CFM radio
* radiocity 96.7
* WAVE 105.2 FM
* 96.9 viking fm
* TFM radio
* 97.4 rock fm
* METRO radio
* Cool FM
* MAGIC 105.4
* Clyde 1
* KEY 103
* Forth One 97.3
* NORTH SOUND
* 1 96.9
* DOWNTOWN Radio
* 96.3 radio aire
* Hallam FM

WE THINK POPULAR.
FEEL INFORMED
BAUER PLACE PORTFOLIO  + 40%

FEEL INVOLVED
BAUER PLACE PORTFOLIO  + 30%

FEEL CONNECTED
BAUER PLACE PORTFOLIO  + 32%

VS. AVERAGE OF 4 MAIN COMPETITORS

WE THINK POPULAR.
WE THINK POPULAR.
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

WE THINK POPULAR.

Source: RAJAR, Bauer Passion Portfolio TSA, 6 Months PE Dec 12
WHAT DOES MUSIC MEAN TO THEM?
Everything

life
THE MOST IMPORTANT THING IN THE WORLD?

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

Source: Bauer Passion Portfolio fans
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%

Source: Bauer Passion Portfolio fans
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%

Source: Bauer Passion Portfolio fans
BETTER FOR ADS

Ads music and news work really well together

77%
12M CROSS PLATFORM CONNECTIONS

6.5m listeners each week

1.9m viewers each week

2.5m readers

183k weekly unique users

900k downloads

787k Facebook Fans
BAUER RADIO TOTAL PORTFOLIO
REACHING 13.3 MILLION ADULTS EVERY WEEK

WE THINK POPULAR.
WE THINK POPULAR.
RADIO FORTH

RAJAR Q4 2012
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%

Source: RAJAR 2012 Q4 based on the Forth 1TSA Radio Forth combined 1 and 2
THE TRANSMISSION AREA

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

WE THINK POPULAR.
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
COMPETITORS

WEEKLY REACH

*Total Radio Forth: 378,000
Forth One: 346,000
Capital FM Scotland: 180,000
Real Radio: 179,000
Other Local Commercial: 128,000
Classic FM: 121,000
Forth 2: 78,000
TalkSport: 70,000
Absolute Radio: 31,000

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
RADIO FORTH

378,000 WEEKLY LISTENERS

RADIO FORTH REACHES...
- 201,000 ABC1 LISTENERS
- 177,000 C2DE LISTENERS
- 285,000 MAIN SHOPPERS

WE THINK POPULAR.
Source: RAJAR 2012 Q4 based on the Forth 1 TSA
FORTH ONE

346,000 WEEKLY LISTENERS

RADIO FORTH REACHES...
- 183,000 ABC1 LISTENERS
- 163,000 C2DE LISTENERS
- 258,000 MAIN SHOPPERS

WE THINK POPULAR.
Source: RAJAR 2012 Q4 based on the Forth 1 TSA
COMMERCIAL MARKET SHARE

FORTH ONE TSA MARKET SHARE
ALL COMMERCIAL RADIO LISTENING

Source: RAJAR 2012 Q4 based on the Forth 1 TSA Radio Forth is the combined figures of Forth 1 and 2 *some stations don not cover the whole of the TSA
WE THINK POPULAR.

MEDIA GROUP
RADIO CLYDE

RAJAR Q4 2012
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

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

WE THINK POPULAR.

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

722,000 WEEKLY LISTENERS

TOTAL CLYDE REACHES...
- 350,000 ABC1 LISTENERS
- 371,000 C2DE LISTENERS
- 604,000 MAIN SHOPPERS

Source: RAJAR 2012 Q4 based on the Clyde1 TSA Radio Clyde is the combined figures of Clyde 1 & Clyde 2
CLYDE 1
624,000 WEEKLY LISTENERS

CLYDE 1 REACHES...
- 297,000 ABC1 LISTENERS
- 327,000 C2DE LISTENERS
- 519,000 MAIN SHOPPERS

Source: RAJAR 2012 Q4 based on the Clyde 1 TSA
CLYDE 2

233,000 WEEKLY LISTENERS

TOTAL CLYDE REACHES...
- 105,000 ABC1 LISTENERS
- 128,000 C2DE LISTENERS
- 207,000 MAIN SHOPPERS

WE THINK POPULAR.
Source: RAJAR 2012 Q4 based on the Clyde 1 TSA
COMPETITORS

WEEKLY REACH

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
COMMERCIAL MARKET SHARE

CLYDE 1 TSA MARKET SHARE
ALL COMMERCIAL RADIO LISTENING

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