



The Scottish Radio Listener Survey

Grand-Prix Winner British Market Research Awards 2001

METHODOLOGY

- The Scottish Radio Listener is one of the most **comprehensive media studies in Scotland**, comprising 3000 in-depth interviews across five Scottish Radio TSAs
- Interviews were conducted in-home with adults aged 15+ during October - December 2002
- The 35-minute interview covered
 - Radio Listening, Attitudes
 - Attitudes Key Media
 - Consumer Behaviour

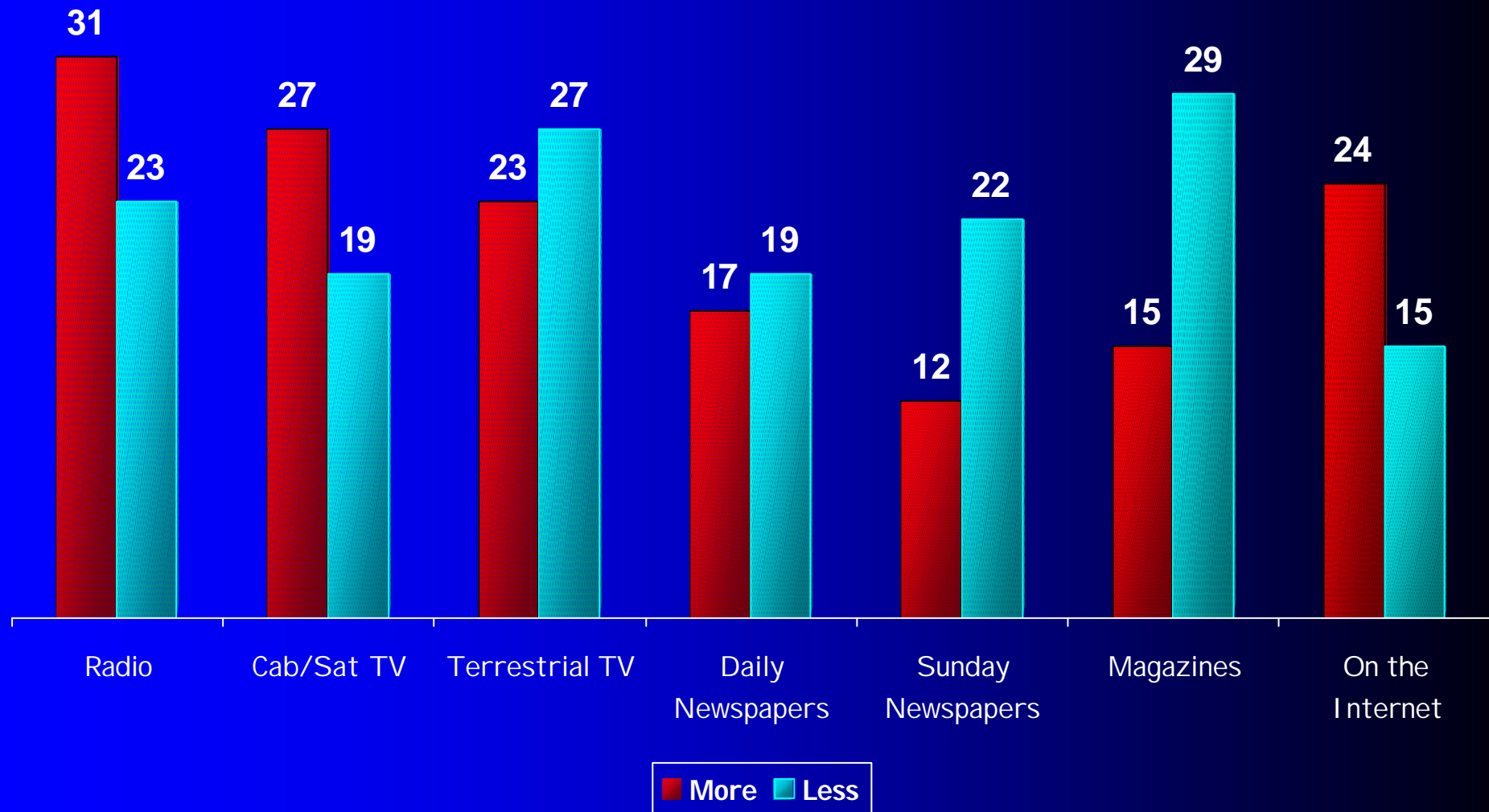
SURVEY HIGHLIGHT

Total Scottish Survey Area

Media Usage

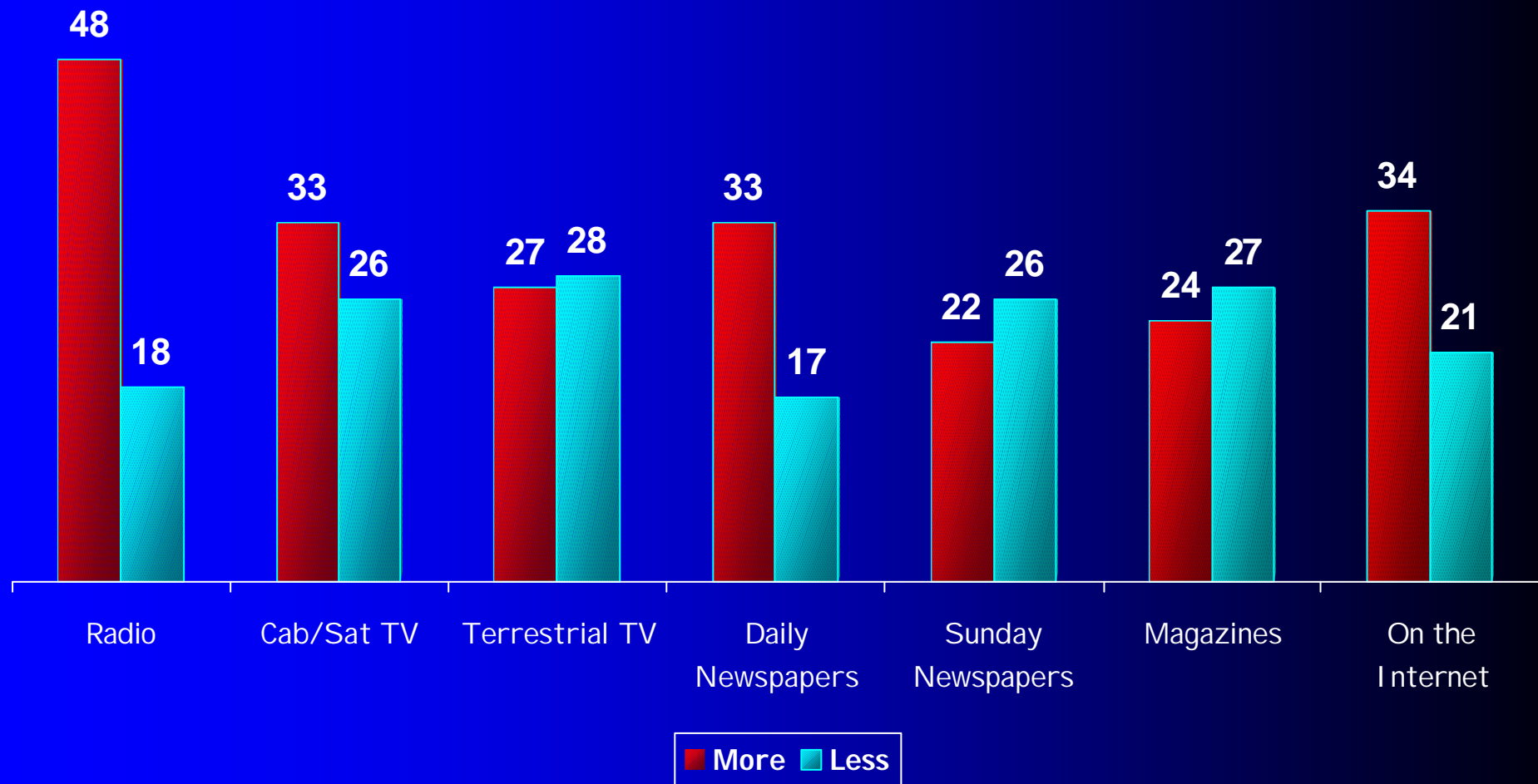
- People feel they are spending more time with Radio and more time on the Internet nowadays.

Do you spend more or less time with media nowadays? All Respondents – Total Scottish Survey Area (2002)



Source: Scottish Radio Listener 4 Base : All respondents, Total TSA

Do you spend more or less time with media nowadays? 15-24's – Total Scottish Survey Area (2002)



Source: Scottish Radio Listener 2002 Base : 15-24's, Total TSA

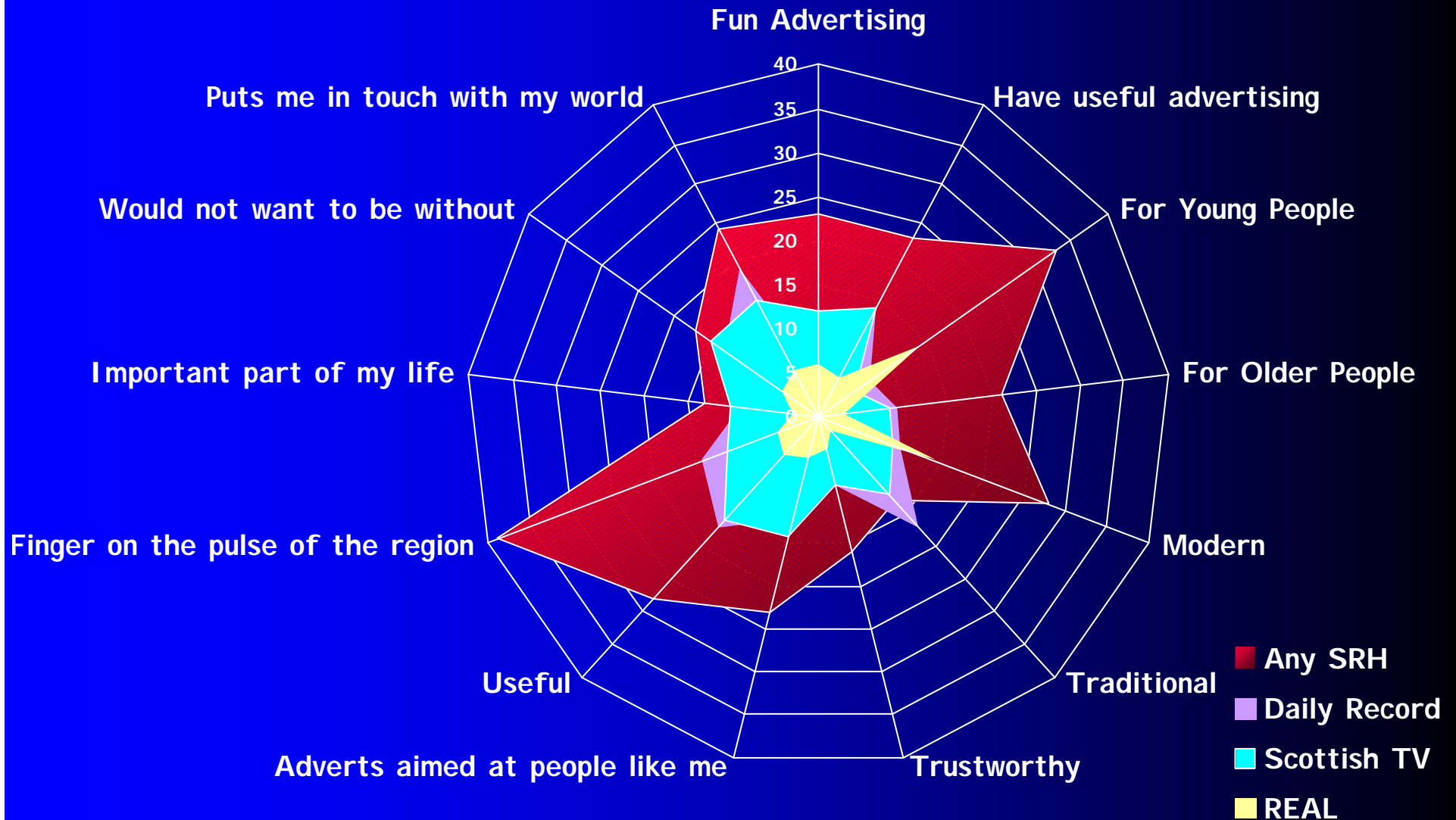
SURVEY HIGHLIGHT

Total Survey Area

Media Footprints

- Among all respondents SRH continues to be a very strong media brand in Scotland as shown in the following *MEDIA FOOTPRINTS*

Footprints Of Key Media – Total Survey Area Among All Respondents



Source: Scottish Radio Listener 2002 Base : All Respondents in Total Survey Area

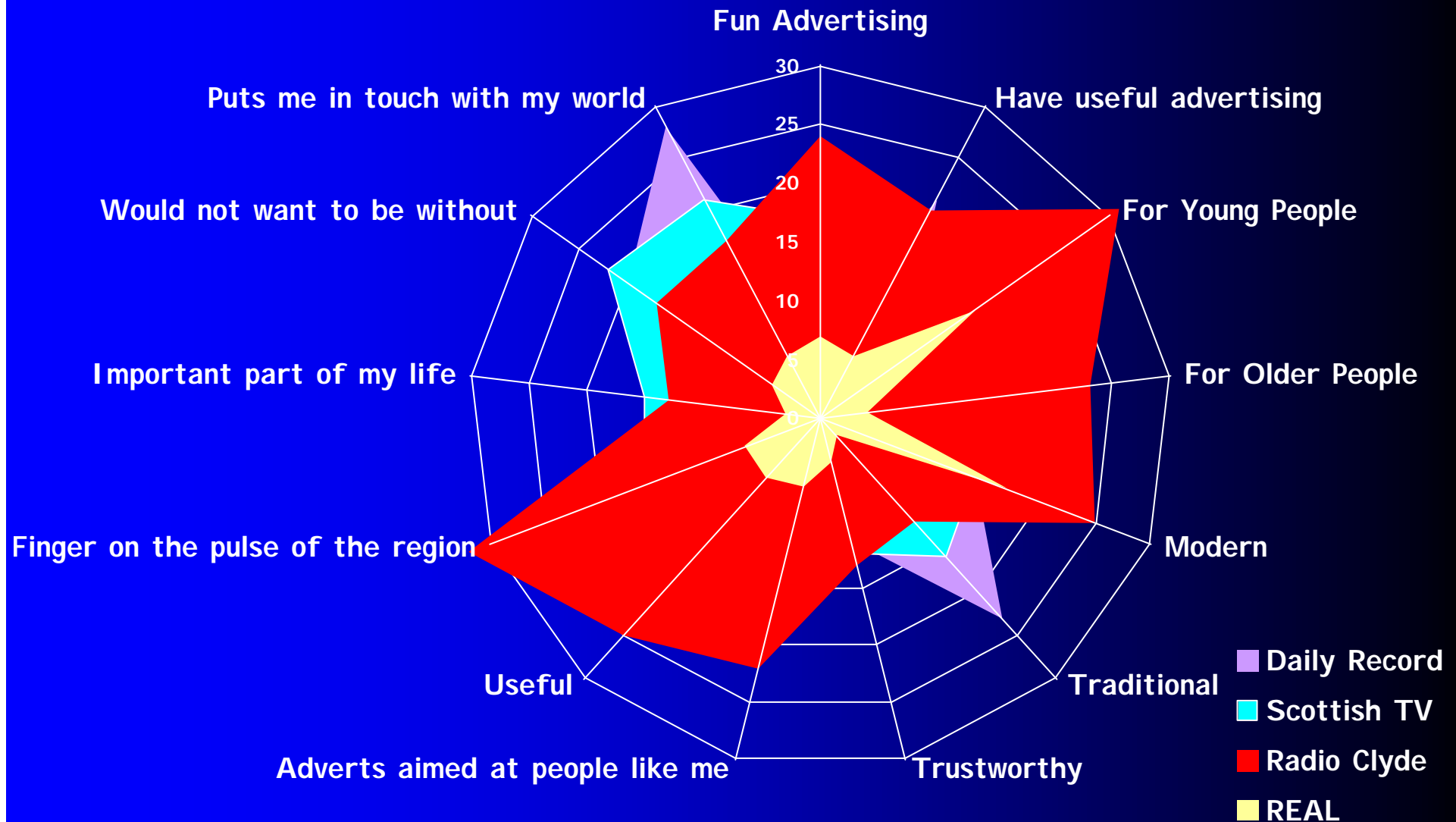
SURVEY HIGHLIGHT

Total Survey Area

Media Footprints

- Radio Clyde is a very strong medium in Glasgow and west central Scotland among all respondents as shown in the following *MEDIA FOOTPRINTS*

Footprints Of Key Media – Clyde TSA Among All Respondents



Source: Scottish Radio Listener 2002 Base : All Respondents in Clyde TSA

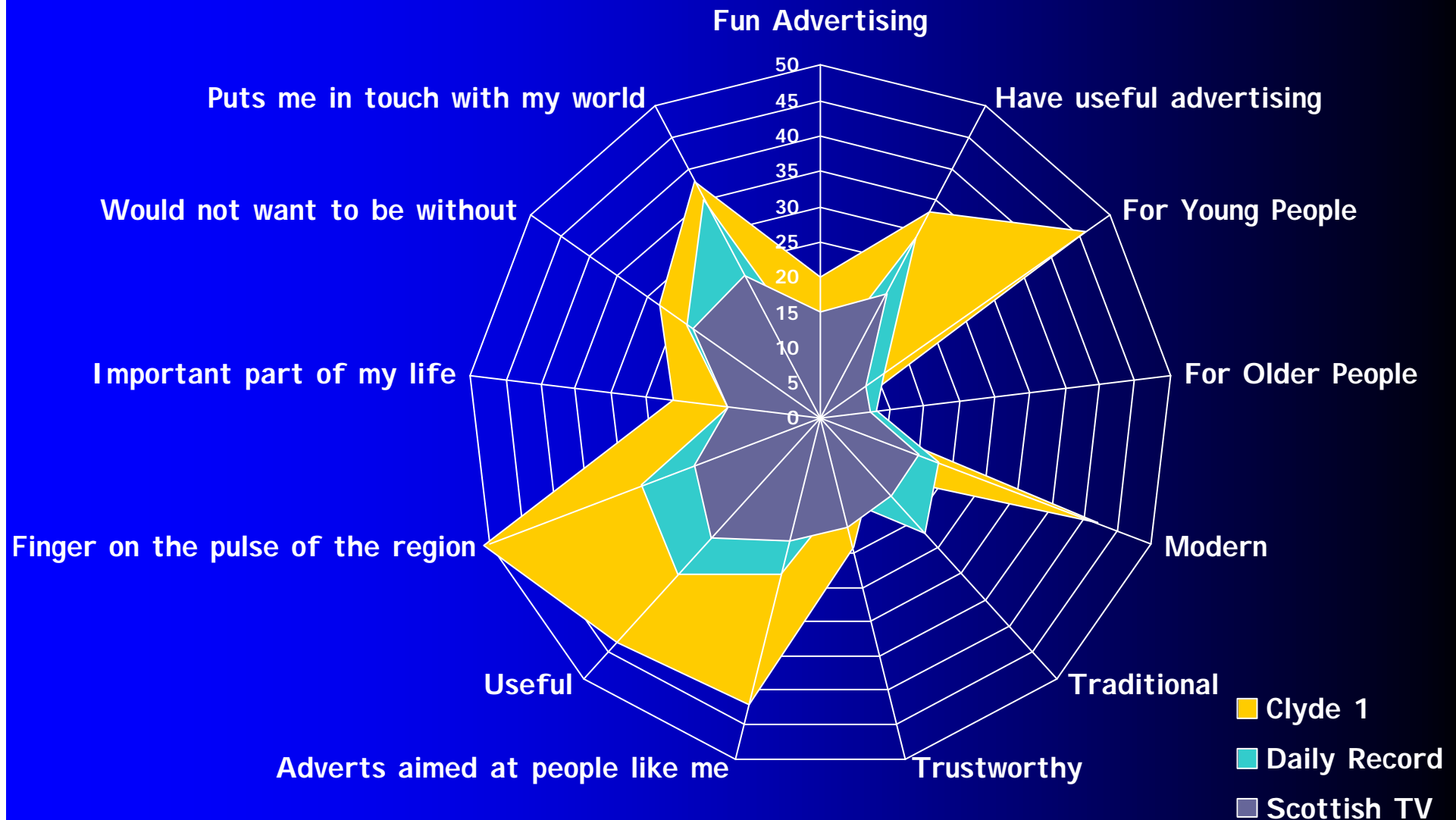
SURVEY HIGHLIGHT

Radio Clyde Survey Area

Media Footprints

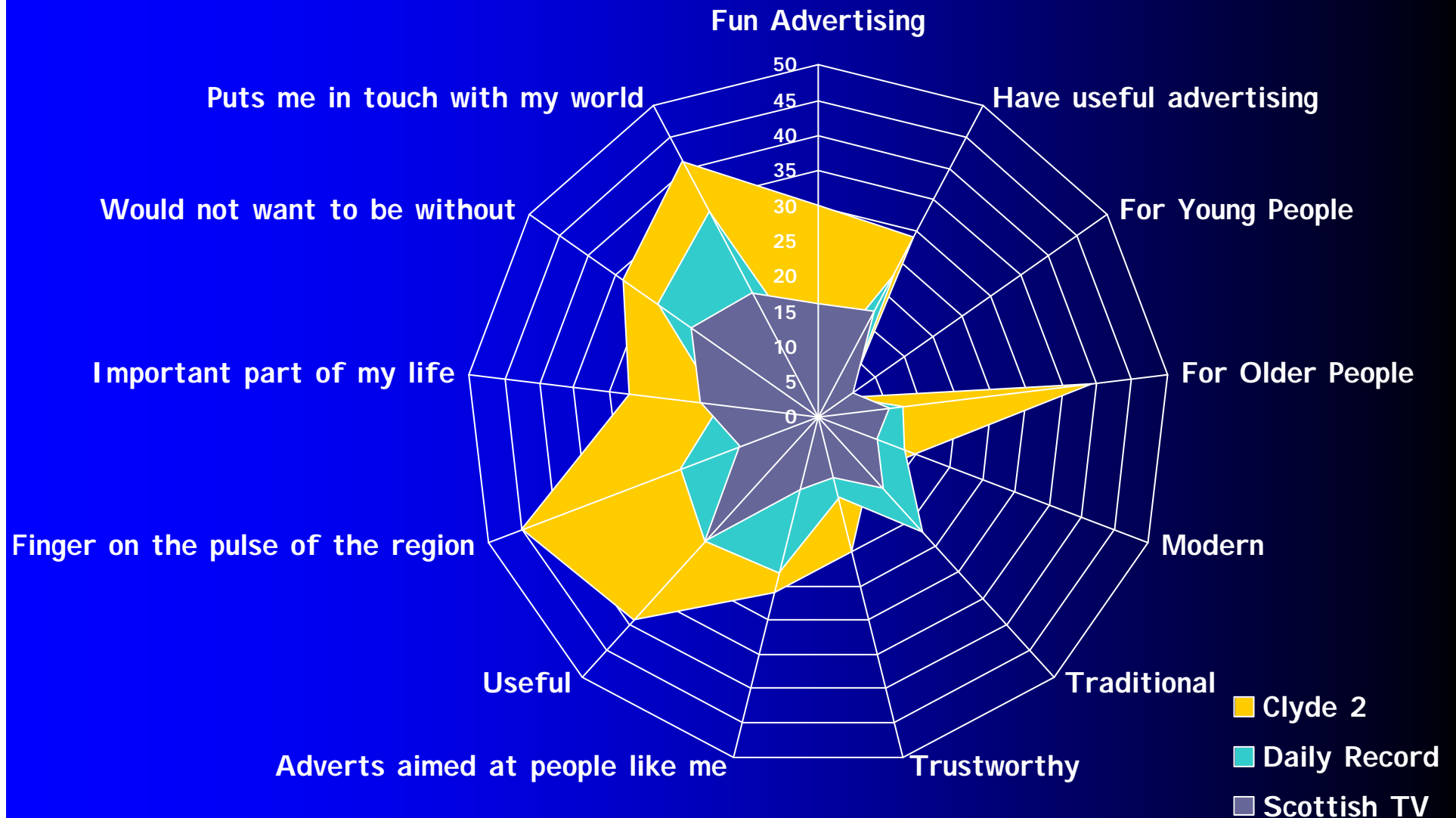
- Clyde 1 and Clyde 2 have a strong image among their listeners as shown in the following *MEDIA FOOTPRINTS*

Footprints Of Key Media – Clyde TSA Among Clyde 1 Listeners



Source: Scottish Radio Listener 2002 Base : Clyde 1 Listeners

Footprints Of Key Media Among Clyde 2 Listeners



Source: Scottish Radio Listener 2002 Base : Clyde 2 Listeners

Consumer Behaviour Market Sectors

Survey Contents

- **Motoring**
 - Car ownership, acquisition and buying behaviour. Purchasing and spend intentions, dealership awareness, repairs and servicing
- **Home Ownership**
 - Household tenure, intention to move home and type of property sought, mortgages, awareness of property developers
- **Furniture & Furnishings**
 - Purchasing and spend intentions, store awareness and loyalty
- **Household Appliances**
 - Purchasing and spend intentions, store awareness and loyalty
- **Home Improvements**
 - Types of home improvements intend to carry out; awareness of and likelihood of shopping at DIY outlets/companies
- **Holidays & Travel**
 - Holidays & short breaks, booking arrangements, Airports and Airlines
- **Visitor Attractions**
 - Visits to themeparks, places of entertainment and historic interest

Survey Contents

- Leisure Activities
 - Participation in leisure and entertainment activities, purchase of sports clothing & equipment
- Grocery Shopping
 - Store usage, spend, shopping behaviour
- Other shopping
 - Clothing - store awareness and visiting intentions, Shopping Centres
- The Internet
 - Access and usage, research of/ purchase of items via the net
- Education
 - Choice of Courses, Perceptions of educational establishments
- Mobile 'phones
 - Ownership, intention to purchase/upgrade/change, method of payment and service provider, awareness of/attitudes to retailers
- Home Entertainment
 - Ownership of high tech equipment, DVD's Videos, Satellite and Cable

Consumer HIGHLIGHTS

Total Survey Area

- Car Ownership & Method of Purchase
- Scotland's Top Internet Purchases
- Further Education
- Mobile Phones
- Holidays

Cars Ownership and Method of Purchase

Most Recent Bought Last Car



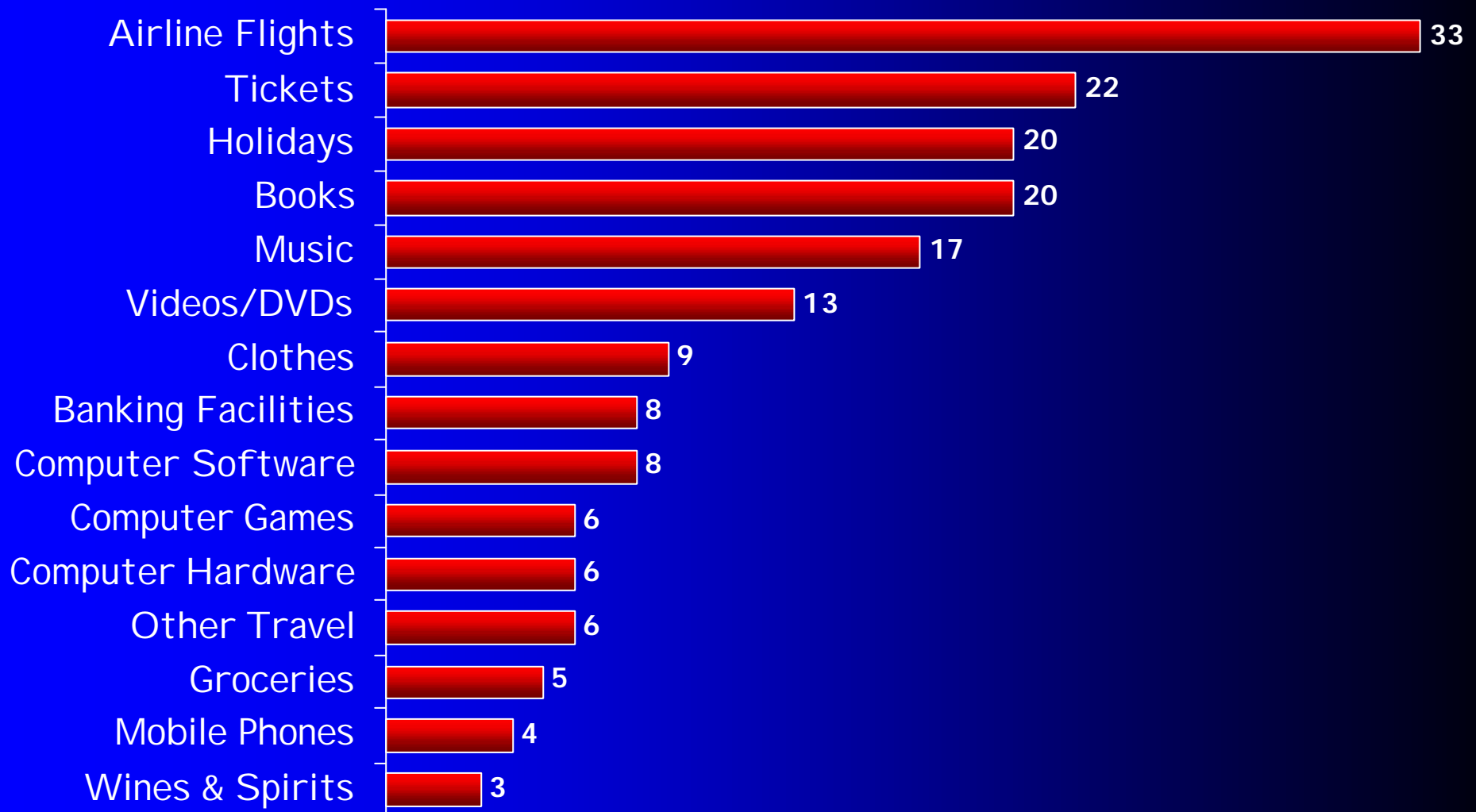
Total Survey Area

(%)

Source: Scottish Radio Listener 4 (2002)
Base: All respondents with Car in Household

Top Internet Purchases

Total Survey Area

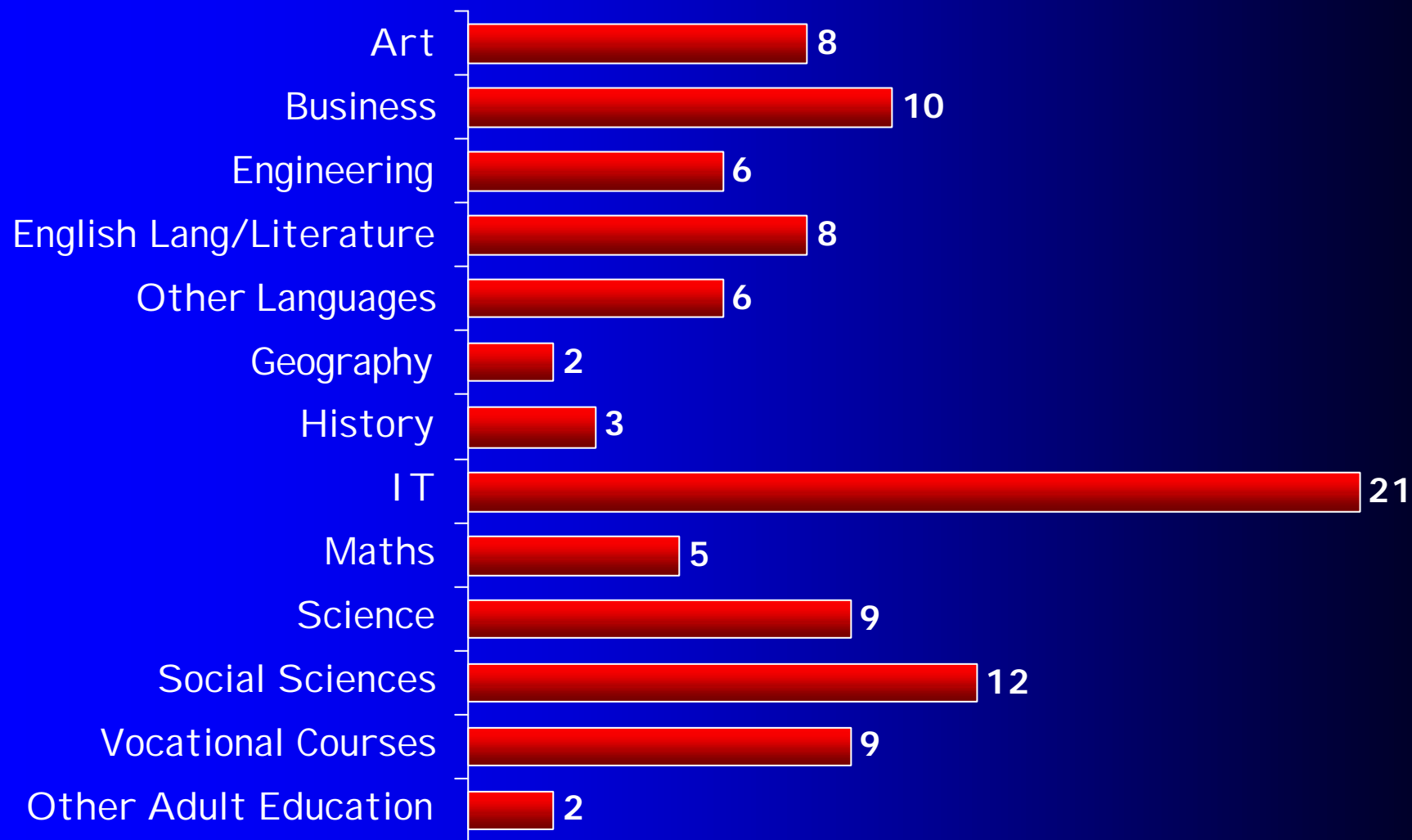


Total Survey Area

(%)

Source: Scottish Radio Listener 4 (2002)
Base: All respondents with Internet Access

Further Education Subject Areas Studying/Considering

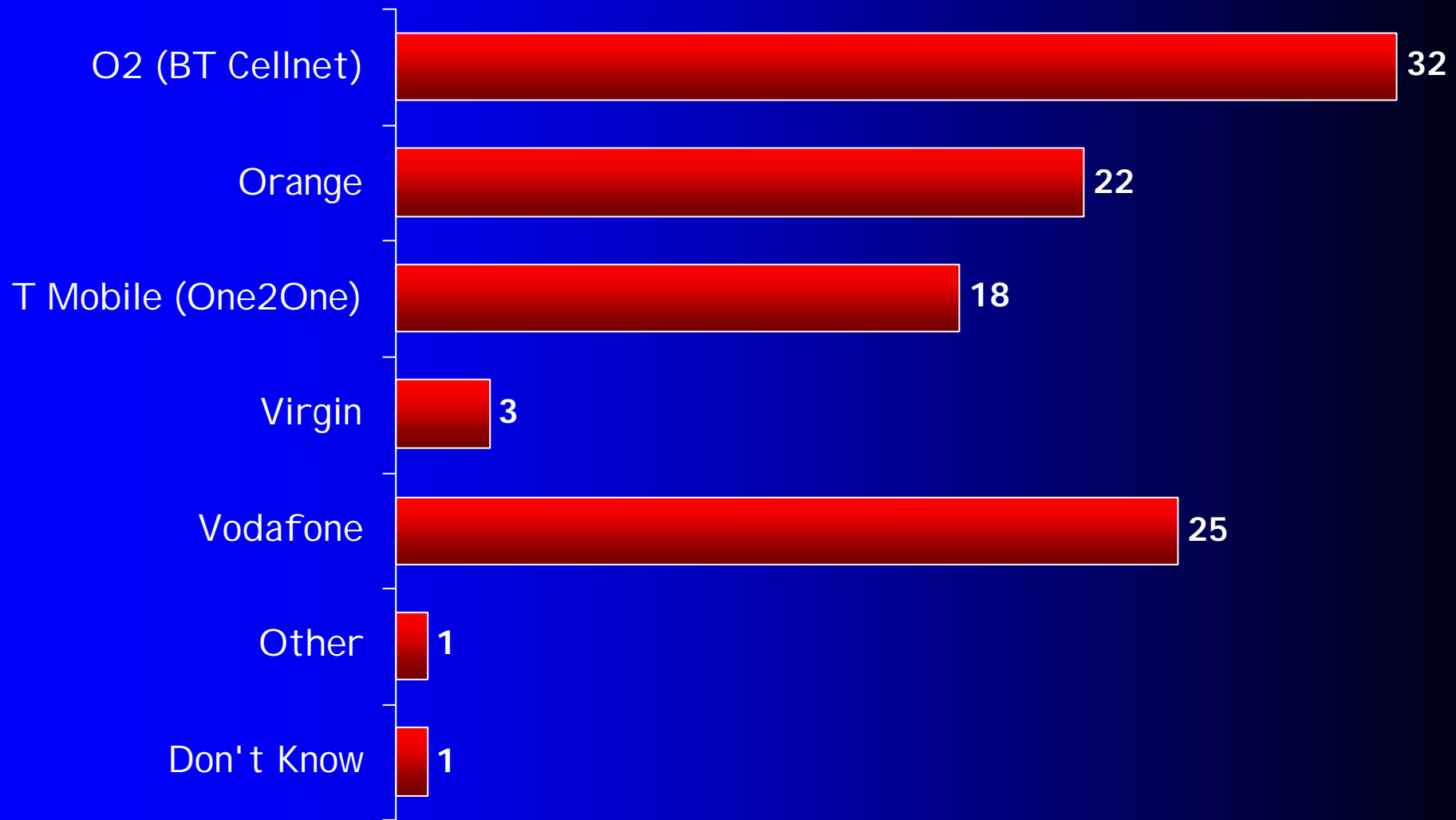


Total Survey Area

(%)

Source: Scottish Radio Listener 4 (2002)
Base: All respondents Studying/Considering FE

Mobile Phone Service Providers Currently Use

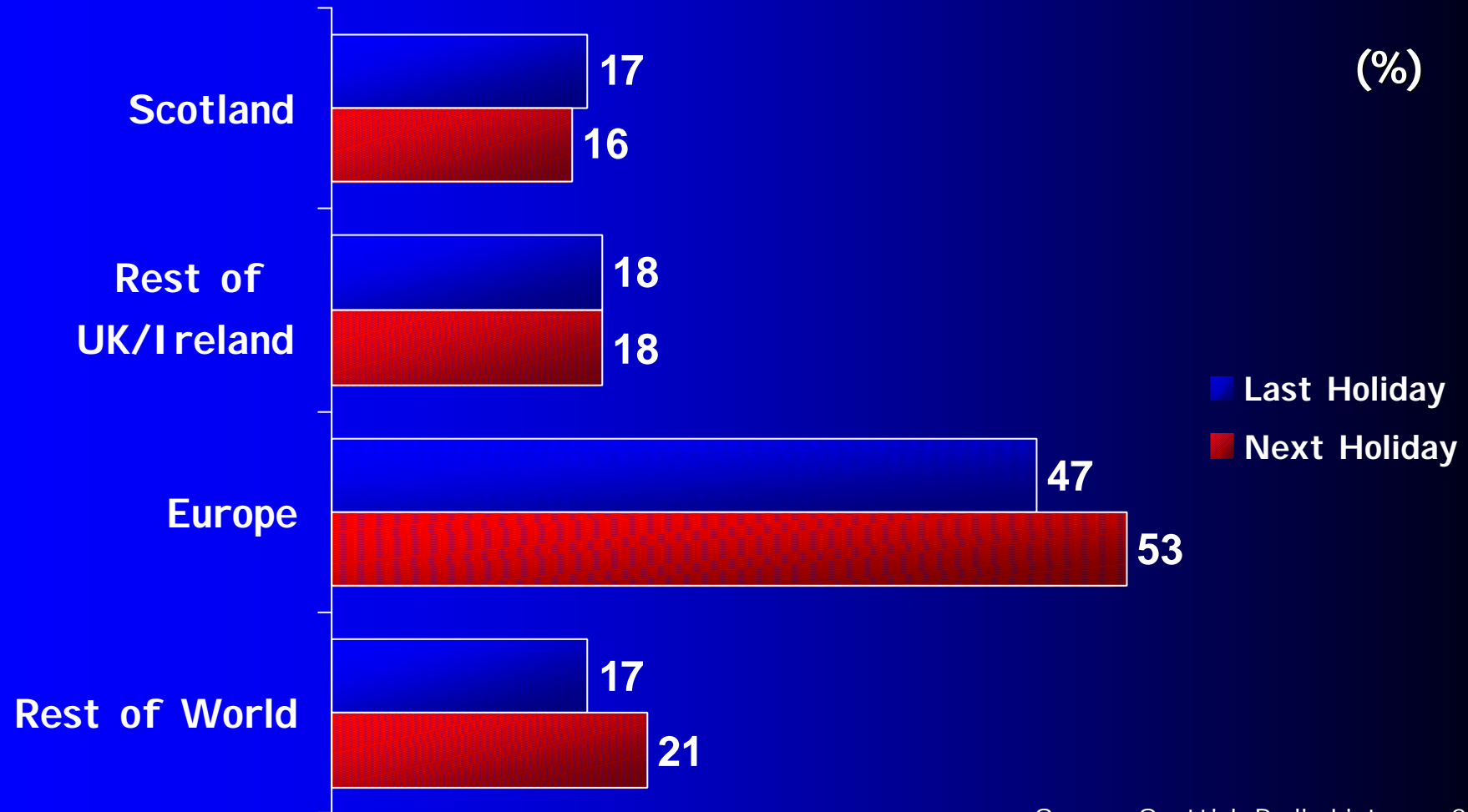


Total Survey Area

(%)

Source: Scottish Radio Listener 2002
Base: All respondents Who Own a Mobile Phone

Holidays Taken/Planning to Take



Source: Scottish Radio Listener 2002

Base: All Adults who have taken a holiday in last 12 months and those planning one in the next 12 months

Total Survey Area