

# Media nations: Scotland 2022



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# Overview

This *Media Nations: Scotland* report reviews key trends in the media sector and sets out how audiences are served in Scotland. We adopt a cross-platform perspective, including broadcast TV and radio, as well as digital delivery including online video and audio streaming.

The report provides updates on several datasets, including data collected directly from licensed television and radio broadcasters (for output, spend and revenue) as well as Ofcom's own consumer research and BARB and RAJAR data (for audience consumption).

In addition to this Scotland report, there are separate reports for the [UK as a whole](#), [Northern Ireland](#) and [Wales](#), as well as an [interactive report](#) containing an extensive range of data.

## What we have found, in brief

### Overall viewing of TV and video has fallen from its pandemic peak, but Scotland continued to watch the most broadcast TV of any UK nation in 2021

- The average amount of time people in Scotland spent watching TV and video content in 2021, across all devices, was 4 hours 48 minutes per person per day, down 21 minutes on 2020, which was more heavily influenced by the Covid-19 restrictions, but up on 2019.
- Time spent watching broadcast TV in Scotland fell by 7.8% compared to 2020, but at 3 hours 28 minutes per day on average, this was still the most of any UK nation.
- Subscription video-on-demand (SVoD) services saw a small uplift in Q1 2022 with 69% of households in Scotland subscribing to at least one, up from 67% in Q3 2021.
- Broadcaster video-on-demand (BVoD) services had comparable levels of reach to SVoD, with most consumers using multiple streaming services. BBC iPlayer was the most popular streaming service in Scotland, used by 75% of online adults and teens.
- Social video platforms are also competing for viewing time and are particularly popular among younger age groups. Internet users in Scotland aged 15+ spent on average 27 minutes per day on TikTok and 38 minutes per day on Facebook and Messenger in March 2022.

## **There is broad satisfaction with public service broadcasting among those who watch it in Scotland**

- In 2021, the main five PSB channels accounted for a combined 54.9% share of the total broadcast TV audience in Scotland, up from 52.7% in 2020.
- Audiences in Scotland are broadly satisfied with PSB, with two-thirds (65%) of those watching PSB channels in the past six months saying this, and only 9% saying that they are dissatisfied.
- Trusted and accurate news is considered by audiences in Scotland to be the most important attribute of PSB, followed by '*programmes that help me understand what is going on in the world today*' and '*a wide range of different types of programmes*'.
- Following production challenges at the height of the pandemic, spend on first-run content for viewers in Scotland increased by 23% in 2021 to £71.3m.
- BBC hours of first-run content in Scotland dropped by 3% in 2021, the decline entirely due to news. However, BBC hours of non-news/non-current affairs content was up by 9% since 2020.
- Of the spend outside London by PSB channels, 7% was on Scotland-based productions in 2021, up from 4.1% in 2020.

## **The ways in which people access and listen to radio and audio content in Scotland continues to evolve**

- In 2021 nearly nine in ten adults listened to the radio in Scotland for an average of 20 hours each week, with BBC network radio stations continuing to have the largest market share.
- Online radio listening now accounts for a fifth of listening hours in Scotland, at the expense of analogue and DAB.
- Smart speakers have not had the same impact in Scotland as they have across the UK overall, accounting only for 6% of overall listening time compared to 10% in the UK.
- Music streaming in Scotland has now become as popular as listening to live radio on a radio set, with a reach of 56%. The music streaming service which accounts for the greatest share of listening is Spotify (81%).
- Per-capita commercial radio revenues in Scotland grew by 16% between 2020 and 2021.

# TV: services, devices and trends

## Introduction

Following 2020, when TV and video viewing habits were significantly impacted by the Covid-19-related restrictions, trends in 2021 and early 2022 have pointed both to the resumption of long-term, pre-pandemic trends, and to the lasting impact of the long periods of lockdown. While most types of viewing have fallen from the unprecedented levels of 2020, people are spending an increasing proportion of their viewing time watching on-demand content, including services provided on a subscription basis (e.g. Netflix), free-to-view from broadcasters (e.g. BBC iPlayer) and on social video platforms (e.g. YouTube).

This chapter draws on data from audience-measurement and ratings agencies, as well as consumer surveys, to evidence and provide commentary on continuing shifts in audiences' TV and video viewing habits and preferences.

## Traditional TV platforms

### **More homes in Scotland have a pay-TV service than rely on Freeview or Freesat**

Television sets are an established presence in our homes; more than nine in ten households in Scotland (95%) had a TV set in Q1 2022.

Traditional paid-for television services such as satellite (mainly Sky) and cable services (Virgin Media) were present in just under half of homes in Scotland (47%) in Q1 2022. Paid-for satellite accounts for most of these, with Virgin Media's cable service present in 12% of Scottish households in Q1 2022, down from 15% in Q4 2021.

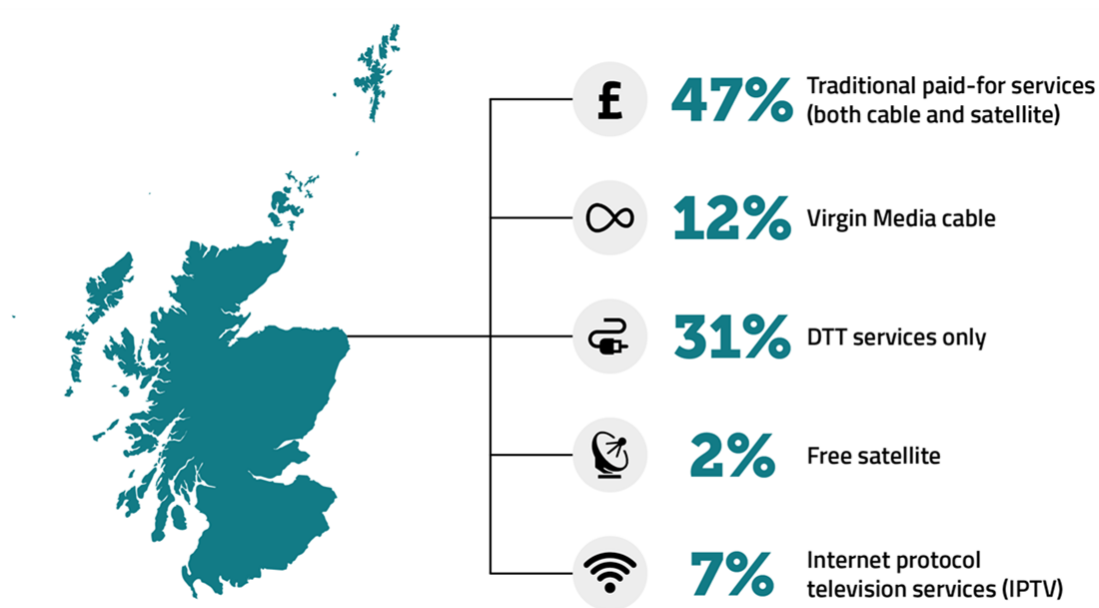
DTT services *only* (delivered through an aerial) account for most of the free TV provision (31%), with free satellite present in just 2% of homes in Scotland, through Freesat.

Only a small proportion of homes in Scotland (7%) had an internet protocol television service (IPTV). These are delivered through set-top boxes from providers such as TalkTalk and BT and offer a Freeview service alongside pay-TV channels, delivered through an internet connection.<sup>1</sup>

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<sup>1</sup> BARB Establishment Survey Q1 2022.

Figure 1: Take-up of TV platforms in Scotland



Source: BARB Establishment Survey Q1 2022.

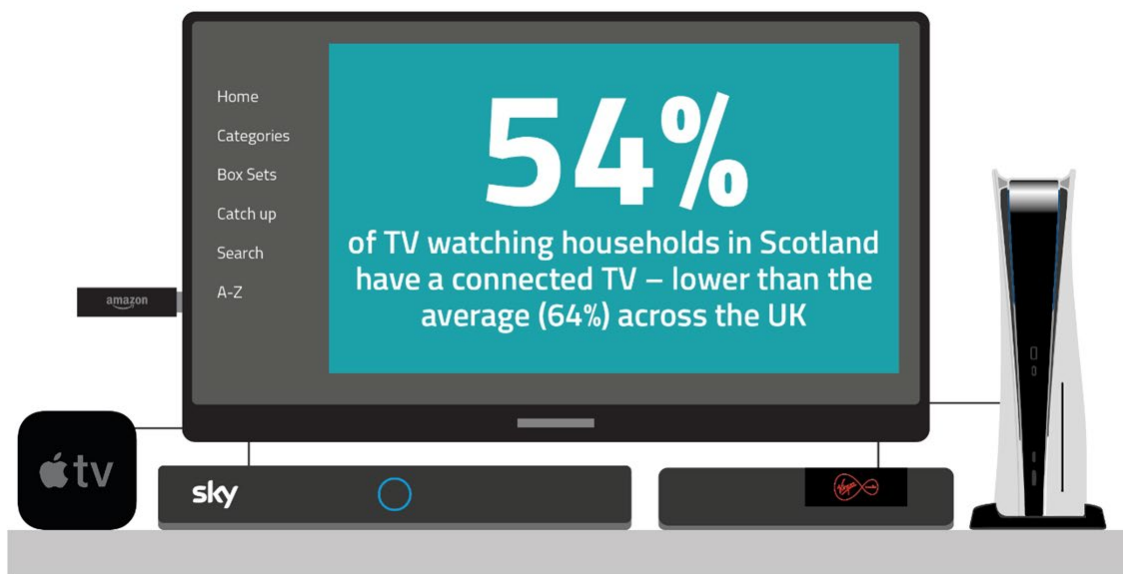
### More than half of TV users in Scotland had connected TVs in 2022

There are several ways in which TV users in Scotland can connect their TVs to the internet. This can be through a 'smart' TV that connects directly to the internet, or through the set-top boxes provided by pay-TV providers like Sky, Virgin or BT. External devices such as streaming sticks and games consoles can also connect TV sets to the internet.

In 2022 more than half (54%) of TV users in Scotland had a connected TV using one of these methods. This was lower than the average across the UK, where 64% of TV homes had a connected TV.<sup>2</sup>

<sup>2</sup> Ofcom Technology Tracker 2022.

**Figure 2: Connected TVs in Scotland**



Source: Ofcom Technology Tracker 2022.

### Broadband take-up in Scotland

More than nine in ten (92%) homes in Scotland had an internet connection at the beginning of 2022; 84% had fixed broadband.<sup>3</sup> In terms of speeds, as of December 2021 94% of all homes in Scotland had access to superfast broadband (download speeds of at least 30 Mbit/s). Of these, more than two-thirds were using a superfast service, up from 57% in 2020. Take-up of full-fibre services in Scotland, where they were available, was 22%.<sup>4</sup> Due to the unique challenges of landscape and population density in Scotland, figures for broadband coverage and take-up are generally lower than the UK average.

### Video on demand

#### There is growing choice for viewers in the range of services they can subscribe to

Connected TVs – alongside connected devices such as smartphones and tablets – provide access to a range of streaming and on-demand services to viewers in Scotland. These range from free services from the PSBs to paid-for global subscription services with a range of membership tiers.

In Scotland, 69% of households subscribed to at least one subscription video-on-demand (SVoD) service in Q1 2022 (up from 67% in Q3 2021).<sup>5</sup> Netflix remains the most popular SVoD service in

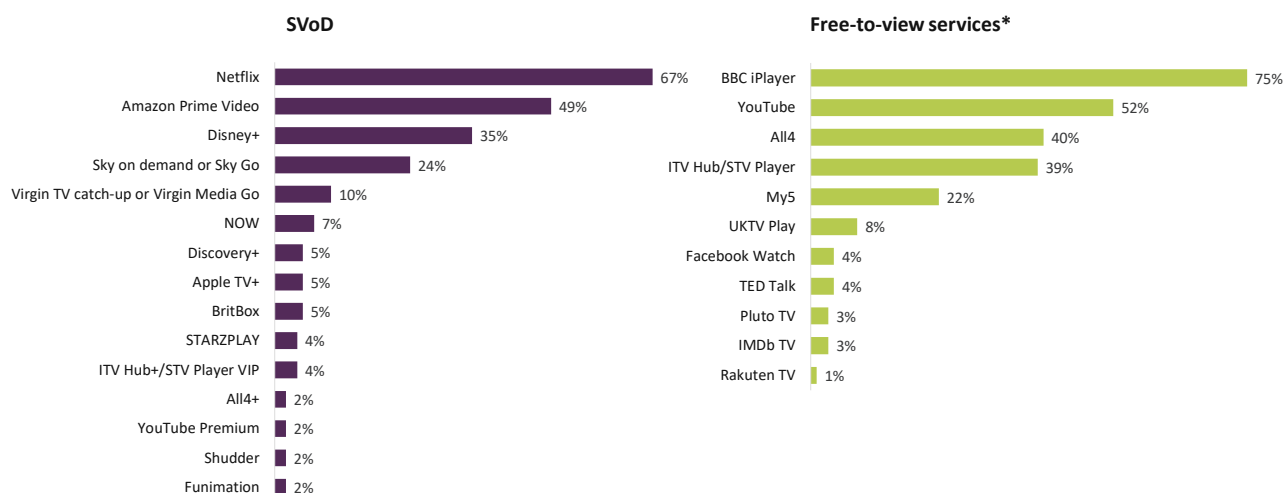
<sup>3</sup> Ofcom Technology Tracker 2022.

<sup>4</sup> Ofcom, [Connected Nations 2021: Scotland report](#).

<sup>5</sup> BARB Establishment Survey Q1 2022.

Scotland, followed by Amazon Prime Video and Disney+, but there is also a huge variety of SVoD services in Scotland which collectively have significant reach. This includes services such as Apple TV+, and genre specialist services such as Shudder (horror) and Funimation (anime).

**Figure 3: Video-on-demand services used in Scotland to watch programmes, films or other video**



Source: Ofcom VoD Survey 2022. Online adults/teens aged 13+, Scotland. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 176. Fieldwork conducted 22-28 February 2022. \*Payment of licence fee required to use BBC iPlayer. NOW includes NOW Entertainment, NOW Cinema and NOW Sports.

## BVoD has comparable levels of reach to SVoD, with most consumers using multiple streaming services

According to Ofcom’s VoD survey, over nine in ten (95%) online adults and teens in Scotland used a free-to-view service (any streaming service not behind a paywall, including YouTube), slightly higher than the other UK nations.

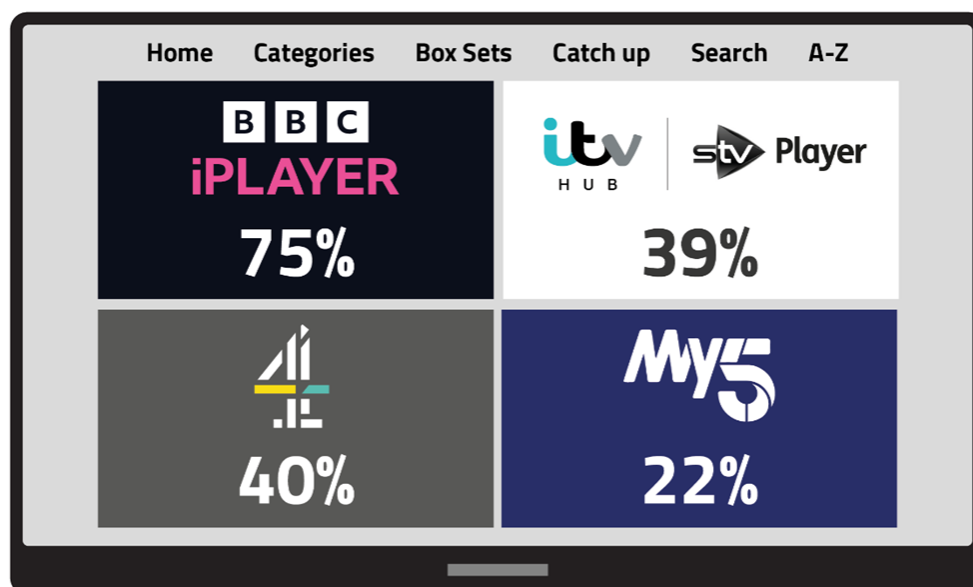
VoD services from the public service broadcasters made up four of the top five most popular free-to-view platforms for watching programmes, films and other video. BBC iPlayer (75%) was followed by All4 (40%), ITV Hub/ STV Player<sup>6</sup> (39%) and My5 (22%). Outside the PSB services, YouTube was also popular, with over half of people in Scotland using it.<sup>7</sup> YouTube’s lower reach in this context may be explained by its large volume of short-form content and creator videos, which users may not associate with traditional ‘programmes’.

<sup>6</sup> While both services are available across Scotland, the programmes on offer on each service differ depending on where in Scotland the viewer is based.

<sup>7</sup> Ofcom VoD Survey 2022.



**Figure 4: PSB video-on-demand services used to watch programmes, films or other video in the past three months**



Source: Ofcom VoD Survey 2022. Online adults/teens aged 13+, Scotland. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 176. Fieldwork conducted 22-28 February 2022. \*Payment of licence fee required to use BBC iPlayer.

### **BBC iPlayer is the most popular service for watching live or catch-up sports content in Scotland**

BBC iPlayer was the most popular online video service for watching live or catch-up sports content among users in Scotland, with Amazon Prime Video second. BBC Scotland broadcasts two editions of *Sportscene* each weekend during the football season; these include highlights of the Scottish Premiership as well as live Friday night football from the Scottish Championship. BBC Scotland also broadcasts Scotland’s rugby home games for the men’s team in the Six Nations, and all the women’s Six Nations games.

BBC ALBA is also available on BBC iPlayer and provided further sports coverage last year. This included the premier competition for Shinty, the Camanachd Cup, as well as live football from the Scottish Women’s Premier League and matches involving the Scotland women’s national team.

**Figure 5: Top ten online video service used by adults and teens who had watched live or catch-up sports in the past three months, by UK nation: February 2022**

Online video service	England	Scotland	Wales	Northern Ireland
BBC iPlayer	25%	26%	24%	24%
Amazon Prime Video	18%	13%	23%	17%
ITV Hub/STV Player	10%	8%	10%	12%

Online video service	England	Scotland	Wales	Northern Ireland
YouTube (excludes clips)	8%	8%	9%	4%
Sky Sports (including NOW and Sky Go)	12%	6%	13%	13%
BT Sport	8%	6%	5%	11%
Facebook	9%	4%	7%	3%
All4	5%	2%	3%	4%
Twitch	3%	1%	2%	1%
Discovery+	3%	0%	4%	2%

Source: Ofcom VoD Survey 2022. Online adults/teens aged 13+. Question: Q2a. Which, if any, of these online services have you personally used to watch live or catch-up sports events in the past 3 months? Fieldwork conducted 22-28 February 2022.

### Football rights in Scotland

Fans of Scottish football face an increasingly fragmented landscape for the 2022/23 season when trying to follow all their team's matches.

Sky will continue to broadcast live matches from the Scottish Premiership through to 2025; these will also be available through its NOW service. Premier Sports will provide exclusive live coverage of the Premier Sports Cup throughout the season and will share live coverage of the Scottish Cup with the BBC. For fans who want to see their teams compete in the major European competitions, BT Sport will continue to show live coverage of the three tournaments until 2027, with Amazon showing selected Champions League matches from 2024.

For fans of the Scotland men's national team, Premier Sports will show live coverage of their matches through to 2024, before Viaplay begins broadcasting the matches through to 2028 on its new service that will launch in the UK later in 2022. In July 2022, Viaplay announced the acquisition of Premier Sports, which will ultimately see Viaplay branding rolled out to the Premier Sports channels.<sup>8</sup>

### Audience satisfaction with subscription streaming services is high

Of those who have used the service in the past six months, four in five said they were satisfied with Netflix (82%) and Disney+ (79%), and about three-quarters said they were satisfied with Amazon Prime Video (77%).

On the main subscription streaming services, ease of use and mass appeal were the main attributes judged to be delivering well for audiences in Scotland. Four in five people in Scotland who had watched Netflix in the past six months said it delivered well on 'provid[ing] services that are easy to find my way around' (80%) and 'easy to find something I want to watch' (78%). For Disney+, these proportions were 71% and 76% respectively, and for Amazon Prime they were 70% and 67%. For four in five (81%) audiences in Scotland, Netflix was seen as delivering well for 'appeal[ing] to a wide

<sup>8</sup> Viaplay Group, [Viaplay Group acquires Premier Sports and accelerates entry into UK](#), 21 July 2022.

range of different audiences’ and ‘a wide range of different types of programmes, such as drama, comedy, entertainment and sport’ (77%). For Disney+ just over half (55%) said it delivered well on a wide range of different types of programmes, such as drama, comedy, entertainment and sport’, while seven in ten said this for Amazon Prime (71%).

**Figure 6: Audience satisfaction with selected subscription streaming services**



Source: Source: Ofcom PSM Tracker 2021, Q39. Satisfied Summary - Overall, how satisfied or dissatisfied are you with these TV catch-up, on-demand or streaming services? Base: All those in Scotland who have watched platform in last 6 months (base size for each service in chart) (N.B. not all services shown here).

For audiences in Scotland who use these services, the main reason for watching subscription streaming services were for their content; this included comments on high -quality, range and specific genres that audiences favoured on these platforms.

***“I can watch new and exciting programmes that I can’t watch on other channels.”***

**Woman, 45-54**

***“Easy to use, user friendly and tons and tons of great content.”*** Woman, 35-44

***“They have great quality shows.”*** Man, 25-34

***“I prefer watching drama and the drama Netflix and Amazon offer is very good.”***

**Man, 55-65**

The main reason expressed by audiences in Scotland who had not used selected SVoD services in the past six months for not using them was cost; either not wanting to pay, the expense of the service, or not wanting to pay for more services than they already had. Content (in terms of the programmes not being interesting) was another main reason.

***“They are expensive and we need to save money”*** Woman, 35-44

***“I can’t justify paying these as I wouldn’t use them enough”*** Woman, 45-54

***“It doesn’t interest me - there is enough on Freeview.”*** Man, 75+

## TV viewing in Scotland

### Where our data comes from

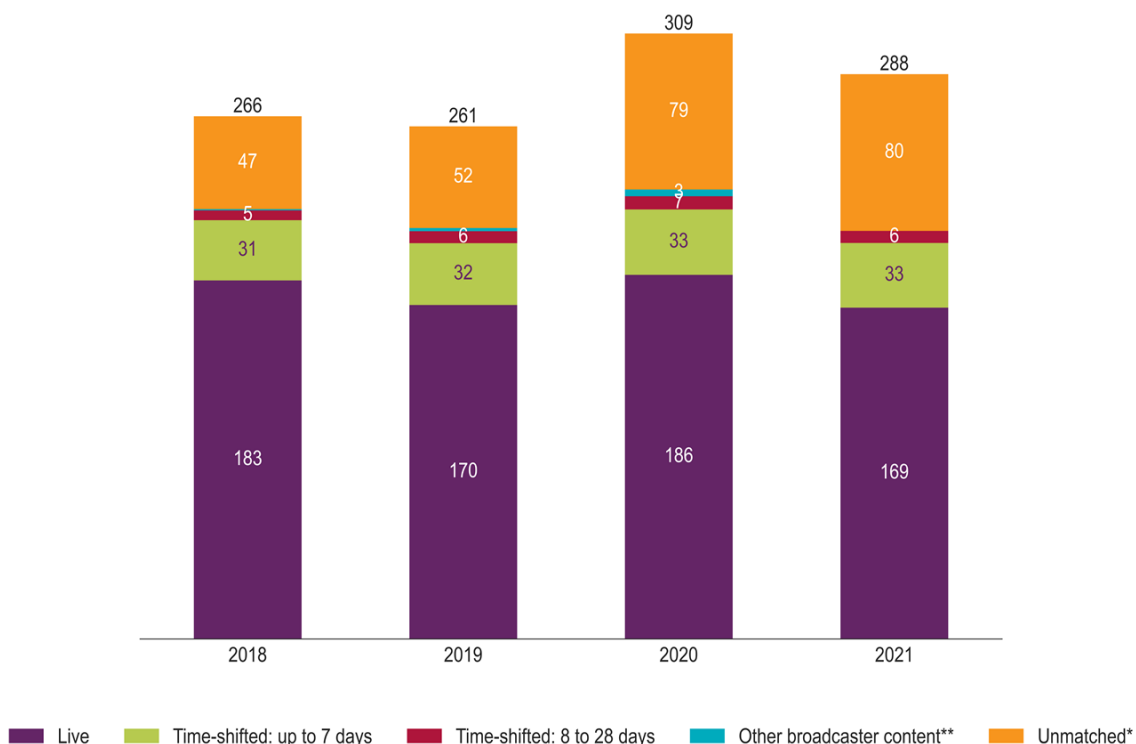
The TV screen viewing data and analysis in this section uses data from the Broadcasters' Audience Research Board (BARB), a nationally representative panel of 5,300 homes across the UK providing the official broadcast TV measurement for the industry. This includes all viewing of broadcast TV through a television set, and via any device attached to the set such as a computer, streaming device or set-top box.

Unless otherwise stated, figures quoted are for 28-day consolidated viewing on a TV set. Consolidated viewing includes viewing of programmes at the time they were broadcast on TV (live viewing) as well as from recordings on digital video recorders (DVRs) and through catch-up player services (e.g. apps on smart TVs) up to 28 days after the first broadcast (time-shifted).

### People in Scotland spent 4 hours 48 minutes on average each day watching TV in 2021

Total video viewing on the television set in Scotland declined by 21 minutes compared to 2020, to an average of 4 hours 48 minutes per person per day in 2021. Seventy-two per cent of this time was spent watching broadcast TV (3 hours 28 minutes); this was down by 18 minutes compared to 2020. The largest contributor to the decrease in total viewing was live broadcast TV.

**Figure 7: Average daily minutes of TV screen time in Scotland, per person**



Source: BARB. All individuals (4+). Average minutes of viewing/day. Unmatched = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs, SVoD, YouTube, time-shifted

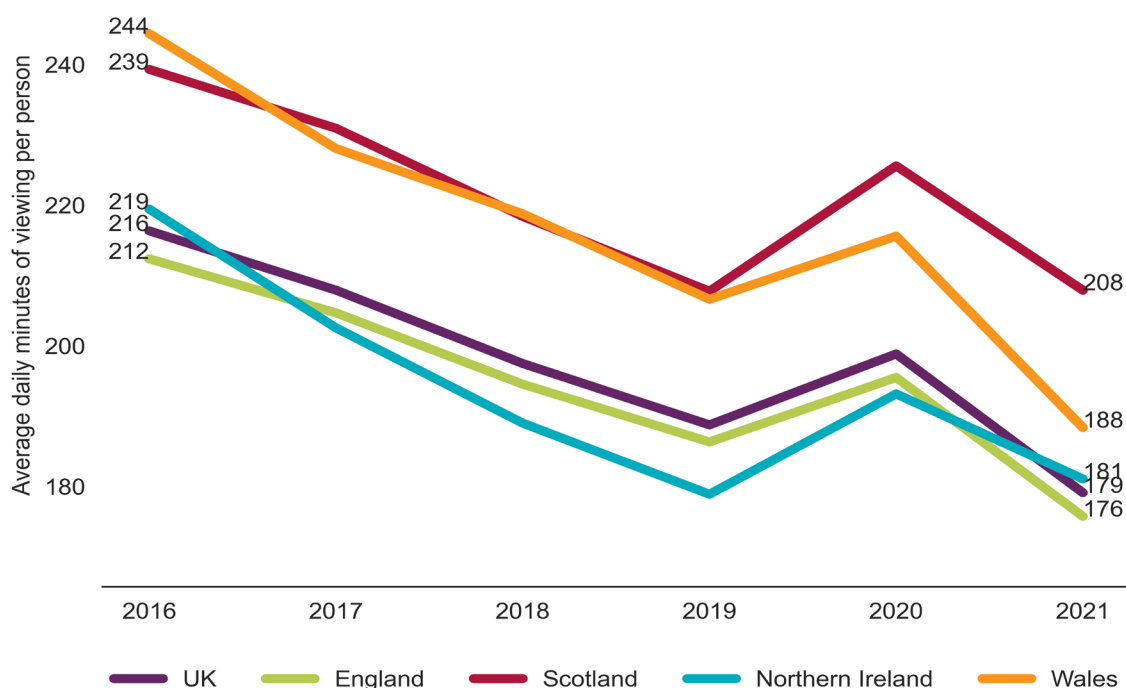
viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded. \*\*Other broadcaster content = content viewed on measured broadcasters' BVoDs and AVoDs that has not broadcast on linear television channels. For example, BVoD exclusives and historical box sets.

## People in Scotland watched the most broadcast TV of any UK nation in 2021

Despite the decrease since 2020, people in Scotland spent an average of 3 hours 28 minutes per day watching broadcast TV on the TV set in 2021, more than any other nation in the UK. This was a 7.8% decrease between 2020 and 2021, compared to the UK average decline of 9.9%.

The average weekly reach for all measured broadcast TV in Scotland in 2021 was 83.3%, compared to 85.1% in 2020.

**Figure 8: Average daily minutes viewed per person, by nation: 2016-2021**



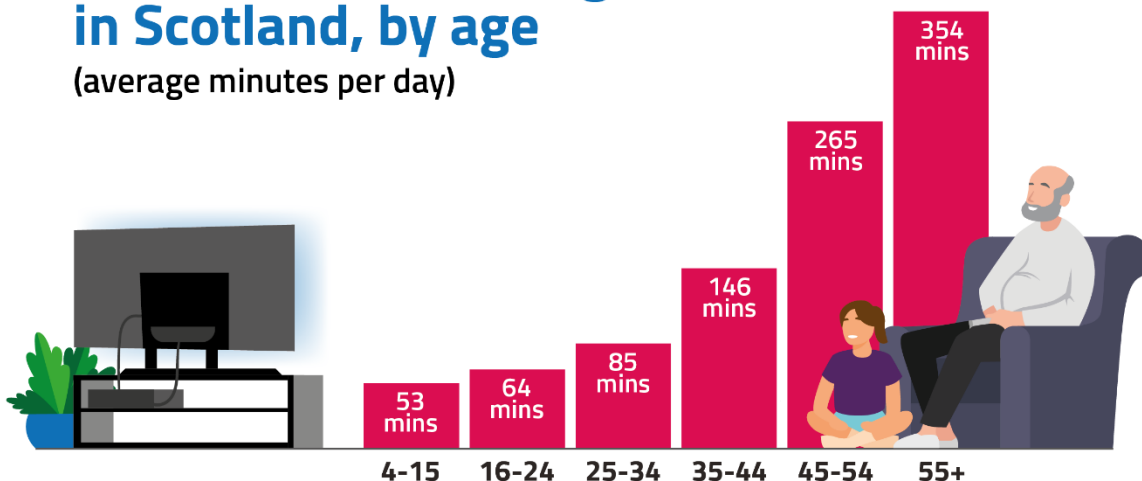
Source: BARB. BBC areas, all individuals (4+).

## Broadcast viewing decreased among all age groups. Overall unmatched TV viewing remained largely unchanged.

Older people in Scotland watched more broadcast TV on the television set than younger viewers. Those aged 55+ watched more than any other age group, at an average of 5 hours 54 minutes per day, down by 5.5% since 2020. Those aged 4-15 watched the least, at an average of 53 minutes per day, down by 24.7% since 2020.

Figure 9: Average daily minutes viewed, by age group

## Broadcast TV viewing in Scotland, by age (average minutes per day)

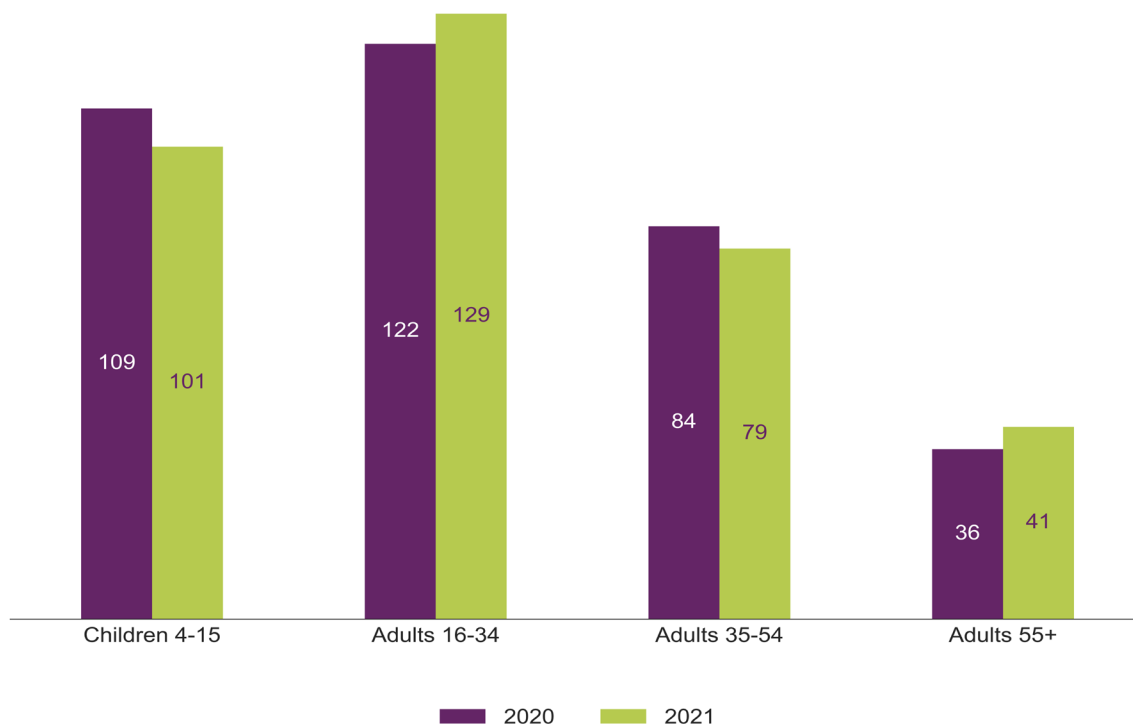


Source: BARB. BBC areas, all individuals (4+).

Younger people in Scotland watched more non-broadcast TV on the television set than older viewers (non-broadcast services on the TV set are classified as ‘unmatched’ by television measurement agency BARB and includes YouTube, gaming, and streaming services like Netflix and Amazon Prime). The greatest proportional increase in unmatched TV viewing was among the 55+ age group, who watched an average of 41 minutes per person per day in 2021, 13.1% more than in 2020. Viewing increased by 5.2% among 16-34-year-olds, to an average of 2 hours 9 minutes.

However, unmatched viewing declined by 7.5% among the 4-15s, dropping to an average of 1 hour 41 minutes per person per day. Viewing also declined among 35-54-year-olds, down by 5.7% to 79 minutes on average per day.

**Figure 10: Average daily minutes of unmatched viewing time per person in Scotland, by age**



Source: BARB. BBC Scotland area. Unmatched viewing = TV in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs, SVoD, YouTube, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content. Audio-matched digital radio stations are excluded.

### **Italy’s victory in the final of Euro 2020 was the most viewed programme in Scotland in 2021**

The final of Euro 2020, which saw Italy defeat England on penalties, was watched by an audience of 1,530,000 when viewing across BBC One Scotland, STV and ITV combined, making it the most-watched TV programme in Scotland in 2021.

The fifth episode of the sixth series of *Line of Duty*, broadcast on BBC One on 18 April, was the second most-viewed show in Scotland in 2021 and first on a single channel. The next most-viewed programme was the Euro 2020 football match between England and Scotland on 18 June 2021; it brought in an average audience of 1,426,000. *Vigil*, set across different areas in Scotland, was the fifth most-viewed programme in Scotland; the episode broadcast on 29 August had an average audience of 1,274,000 and ranked higher on this list than it did in the top programmes list for Northern Ireland and Wales.

**Figure 11: Top ten most-watched programmes in Scotland: 2021**

Rank	Programme Title	Channel	Date	Average audience (000s)	Programme Share %
1	<i>Euro 2020 / UEFA European Football Championship (England-Italy Final)</i>	BBC One Scotland simulcast with STV/ITV	11/07/2021	1,530	49.4 BBC One Scotland 8.6 STV/ITV
2	<i>Line of Duty</i>	BBC One Scotland	18/04/2021	1,517	57.5
3	<i>UEFA European Football Championship (England-Scotland)</i>	STV/ITV	18/06/2021	1,426	67.7
4	<i>Oprah with Meghan and Harry</i>	STV/ITV	08/03/2021	1285	55.6
5	<i>Vigil</i>	BBC One Scotland	29/08/2021	1274	44.0
6	<i>Strictly Come Dancing</i>	BBC One Scotland	18/12/2021	1084	56.2
7	<i>Shetland</i>	BBC One Scotland	03/11/2021	1048	45.4
8	<i>Bloodlands</i>	BBC One Scotland	21/02/2021	960	39.6
9	<i>The Great British Bake Off</i>	Channel 4	21/09/2021	903	36.6
10	<i>I'm A Celebrity... Get Me Out of Here!</i>	STV/ITV	21/11/2021	864	42.9

Source: BARB consolidated to 28 days. Highest occurring episode on individual channels (except the Euro 2020 final where audiences have been combined across BBC One Scotland / ITV / STV).



## Social video in Scotland

### Young adults in Scotland spend almost an hour on TikTok per day

TikTok is continuing to grow, reaching 38% of adult internet users in Scotland in March 2022. It is particularly popular among younger adult users, with 65% of online 15-24-year-olds in Scotland visiting the platform.

**Figure 12: UK nation online adult reach of TikTok, by age: March 2022**



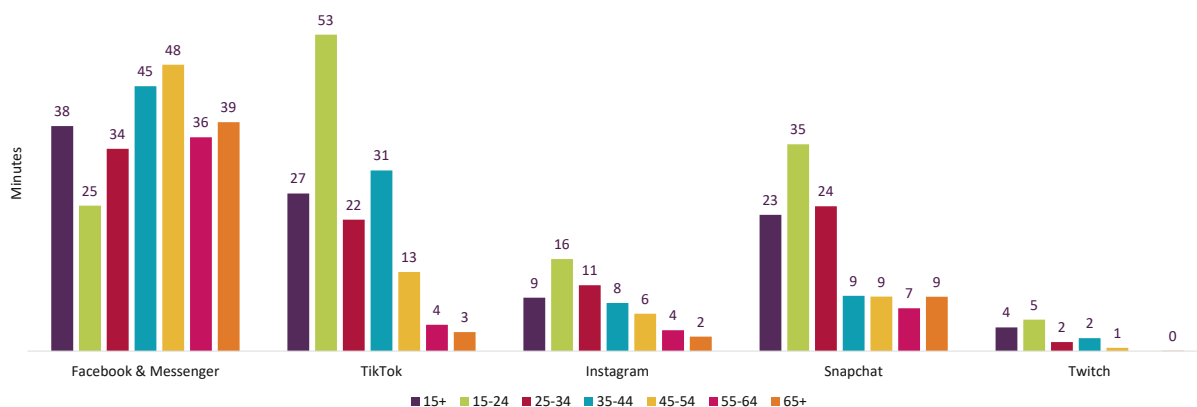
Source: © Ipsos, Ipsos iris Online Audience Measurement Service, 1 March – 31 March 2022, adults age: 15+, UK nations. Note: TV set and smart display use not included.

In March 2022, the almost 355,000 15-24-year-old TikTok visitors in Scotland spent almost an hour (about 53 minutes) on TikTok per day, while the 362,000 15-24 Snapchat visitors spent on average 35 minutes per day using the service. In comparison, online visitors aged 15-24 to Facebook (including FB Messenger) and Instagram spent 25 and 16 minutes per day respectively. In July 2021, TikTok increased the maximum video length from one minute to three minutes, and by October, average video length was two minutes; this may be contributing to the increased time spent on TikTok.<sup>9</sup>

Adult TikTok visitors in Scotland spent on average 27 minutes per day on the platform in March 2022, while adult visitors to Facebook and Messenger spent about 38 minutes per day. There are clear age differences in the times spent on video platforms: visitors aged 45-54 to Facebook and Messenger spend the most time, on average, on the platform, while 15-24-year-old visitors spend the least among all adults, and 15-24 year-old visitors to TikTok, Instagram and Snapchat spend more time on these platforms than older visitors.

<sup>9</sup> TikTok newsroom, [Discover more ways to create, connect and be entertained with longer videos on TikTok](#), October 2021.

**Figure 13: Time spent per day by online adult visitors in Scotland to selected social video platforms, by age: March 2022 (minutes)**



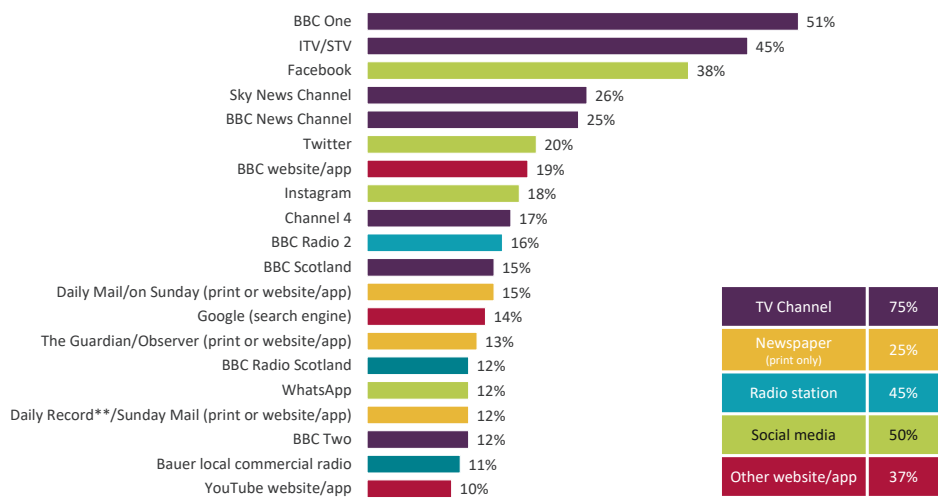
Source: © Ipsos, Ipsos iris Online Audience Measurement Service, 1 March – 31 March 2022, adults age: 15+, Scotland. Note: TV set and smart display use not included. Custom-defined list by Ofcom. Please note, time spent relates to time spent on platform which can include viewing video, communicating, scrolling or any other activity on the platform. At present YouTube time spent is not measurable using Ipsos Iris, see [UK report](#) for information on YouTube.

## News sources in Scotland

### BBC One was the most-used source for news in Scotland

About half of all adults in Scotland (51%) use BBC One for news in general, making it the most-used news source, followed by STV (45%). Other TV channels in the top ten included Sky News Channel, BBC News Channel and Channel 4. Social media ranked highly too, with Facebook the third most popular source of news (38%), Twitter the sixth most popular (20%) and Instagram (18%) eighth. The BBC website/app was the highest-ranking website or app (19%), and BBC Radio 2 was the top radio station cited (16%). No newspapers made the top ten.

**Figure 14: Top 20 sources of news in general in Scotland: 2022**

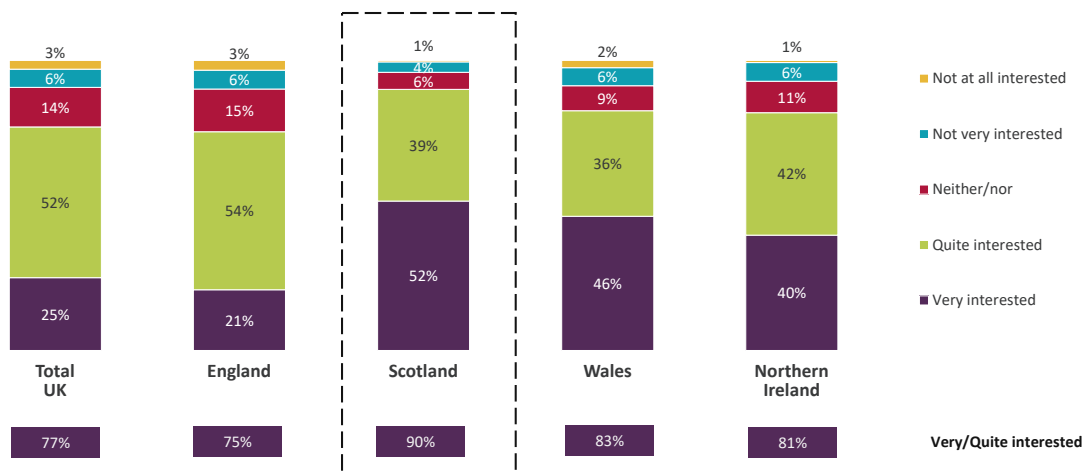


Source: Ofcom News Consumption Survey 2022 – Combined F2F and online sample. Base: All adults 16+ in Scotland - 2022 W2\*=344. \*2022 W1 data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic. \*\*Daily Record website/app added in 2022.

### Half of all adults in Scotland say they are ‘very interested’ in news about their nation

There is a significant amount of interest in news about Scotland among people who live in Scotland. Half of the adults who follow news claim to be ‘very interested’ in news about Scotland (52%) – this is higher than equivalent figures for other UK nations and rises to 90% who are either ‘very’ or ‘quite’ interested.

**Figure 15: Level of interest in news about own nation, by nation**

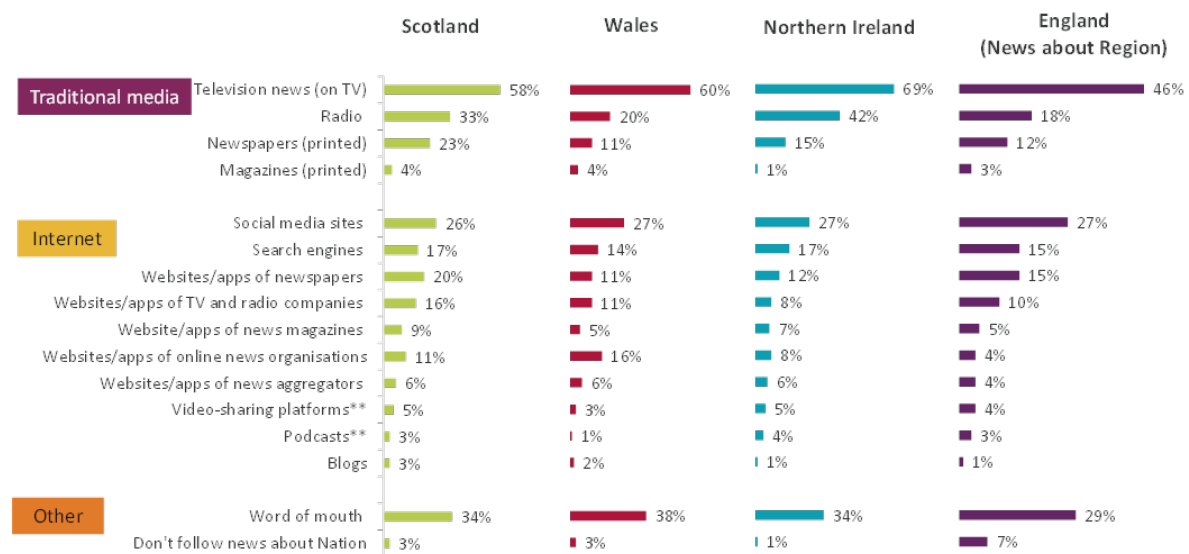


Source: Ofcom News Consumption Survey 2022 – Combined F2F and online sample. Base: All adults 16+ who follow news 2022 W2\* - Total=2708, England=1758, Scotland=332, Wales=329, Northern Ireland=289 \*2022 W1 data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic.

## Television is the most popular way for people to access news about their own nation

While television was by far the most popular way for people in all UK nations to access news about their own nation, the use of radio for news varied significantly across the nations: 33% of adults in Scotland reported using the radio as a news source, compared to 42% in Northern Ireland and 20% in Wales.

**Figure 16: Platforms used to access news about own nation, by nation: 2022**



Source: Ofcom News Consumption Survey 2022 – combined F2F & online sample. Base: All adults 16+ who follow news 2022 W2\* - England=1758 Scotland=332, Wales=329, Northern Ireland=289. \*2022 W1 data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic. \*\* Added in 2022.

## Nearly a third of people in Scotland use STV for news about their own nation

Looking at the specific sources that people in Scotland use to access news about their own nation, just under a third of people (31%) use STV, with about a quarter (26%) saying they use BBC One. This is followed by Facebook (15%) and the BBC website/app (10%), which are the two most-used online sources for news about Scotland.

Figure 17: Sources used to access news about own nation: 2022

England		Scotland		Wales		Northern Ireland	
BBC One	31% ▼	STV	31%	BBC One	46%	UTV	47%
ITV	18% ▼	BBC One	26%	ITV Wales	28%	BBC One	38%
Facebook	17%	Facebook	15%	Facebook	21%	Facebook	18%
BBC website/app	8%	BBC website/app	10%	BBC website/app**	8%	BBC Radio Ulster/Foyle	13%
BBC News Channel	6% ▲	BBC Scotland TV	9% ▼	Twitter	6%	BBC website/app	11%
Twitter	5%	Twitter	8%	Any Wales based news sites/apps	6%	Cool FM	10%
		BBC Radio Scotland	7%	BBC Radio Wales/Cymru	5%	U105	6%
		BBC News Channel	6%	BBC News Channel	5%	Twitter	6%
		Bauer local commercial radio	6%			The Belfast Telegraph	5%
		Instagram	6% ▲			Any NI based news website/app	5%
		Any Scotland based daily newspaper	5%				
		Any Scotland based news sites/apps	5%				
		Sky News Channel	5%				
Don't follow region news	10%	Don't follow Nation news	5%	Don't follow Nation news	6%	Don't follow Nation news	2%

Source: Ofcom News Consumption Survey 2022 – Combined F2F and online sample. Base: All adults 16+ using TV/Newspapers/Radio/Internet/Magazine for news 2022 W2\* - England=1727, Scotland=326, Wales=325, Northern Ireland=287. \*2022 W1 data not shown because face-to-face fieldwork was not possible during Covid-19 pandemic. \*\* Includes Welsh language version. Only sources with an incidence of 5%+ in each nation are shown. Green/red triangles indicate statistically significant differences between 2022 and 2020 (at 99% confidence level).

# Public service broadcasting

## Introduction

Public service broadcasting (PSB) is an intervention, designed by the UK Parliament, to ensure that UK audiences can enjoy a wide range of high-quality TV programmes that meet people's needs and interests as citizens and individuals.

Under the current framework, specified PSB services must collectively fulfil certain statutory purposes and individually meet a set of service-specific requirements.<sup>10</sup> When describing the public service channels taken together, the term public service broadcasting (PSB) is used. The term 'public service media' is a broader term which was used in Ofcom's review, [Small Screen: Big Debate](#), to reflect the fact that audiences are no longer limited to 'broadcast' channels and can watch content from the public service broadcasters on a range of broadcast and online services.<sup>11</sup>

### Legislative reforms proposed to safeguard the future of public service broadcasting in the UK

In July 2021, Ofcom made recommendations to the UK Government on the future of the public service media (PSM) system for the next decade. The recommendations marked the conclusion of Ofcom's [Small Screen: Big Debate](#), an in-depth review of the future of PSM.

The UK Government recently set out its vision for the broadcasting sector in a White Paper ahead of the forthcoming Media Bill.<sup>12</sup> Among other things, the paper explains the UK Government's intention to implement some of the key recommendations of our [Small Screen: Big Debate](#) review. These include a simplified remit, a new prominence regime for PSB online services on the major connected TV platforms, and greater flexibility for PSBs in how they deliver their obligations, including through their online services.

This chapter provides an update on key data relating to PSBs in Scotland, including trends in audience viewing and a breakdown of output and content spend by PSB networks. It also provides an overview of findings from Ofcom's proprietary PSM Tracker, examining audience perceptions of, and satisfaction with, public service media amongst audiences in Scotland.

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<sup>10</sup> See [Annex 8. PSB regulatory framework](#) regarding the PSB regulatory Framework, including the PSB remits and the service-specific requirements for the individual PSB providers.

<sup>11</sup> During our [Small Screen: Big Debate](#) review, several respondents questioned the concept and scope of public service media and suggested it should be clearly defined in legislation. We agreed with the need for clarity and considered 'PSM' as the best way to describe public service content delivered through a range of platforms including broadcast TV and online services.

<sup>12</sup> [Up next - the government's vision for the broadcasting sector](#), April 2022.

## Public service broadcasting in Scotland

In Scotland, public service broadcasting is currently provided by the BBC, Channel 4 Corporation (C4C), STV, ITV and Channel 5. Although all the BBC TV services are PSB channels, only the main channels of the other broadcasters are. In return for providing PSB services such as news and original productions, these broadcasters receive certain benefits: access to spectrum (the radio waves that support wireless communication) to broadcast their services; prominence on electronic programme guides on television (EPGs); and in the BBC's case, the licence fee.

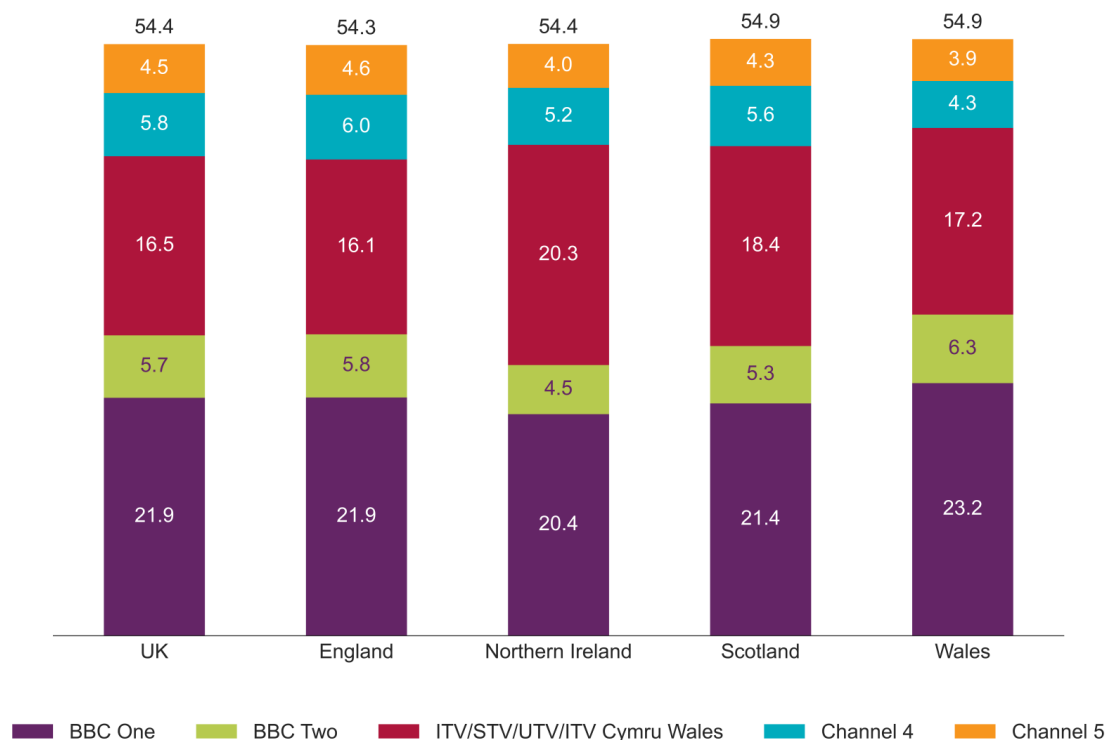
BBC One Scotland, BBC Scotland and BBC ALBA are available across the country, while STV and ITV provide bespoke news programmes for those who live in the north of Scotland, central Scotland and the south of Scotland. Channel 4 and Channel 5 provide their public service content on a pan-UK basis.

## PSB viewing trends

### The main five PSB channels accounted for more than half of total broadcast viewing in 2021

In 2021, the main five PSB channels accounted for a combined 54.9% share of the total broadcast TV audience in Scotland, up from 52.7% in 2020. BBC One had the highest audience share of any individual PSB channel, at 21.4%. Channel 5 had the lowest audience share of any individual PSB channel, at 4.3%.

**Figure 18: Percentage share of total TV viewing for the five main PSB channels, by nation: 2021**



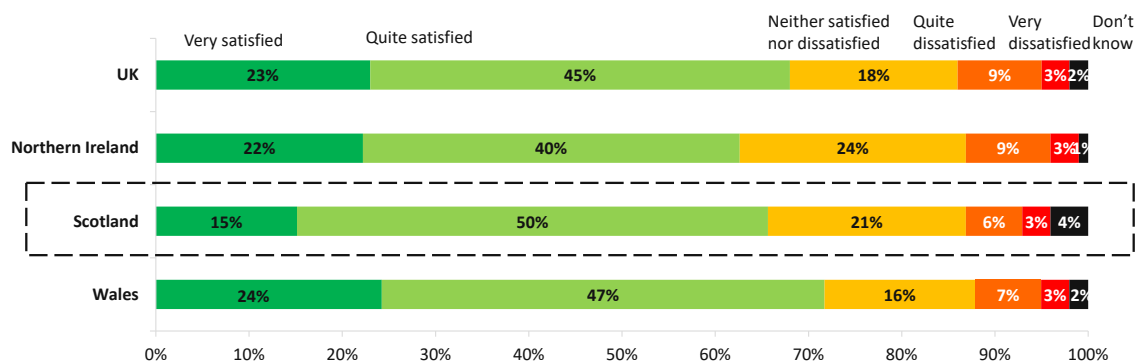
Source: BARB. BBC areas, all individuals (4+). Excludes any +1 channels.

## Audience attitudes towards PSBs in Scotland

### Overall, audiences in Scotland are broadly satisfied with public service broadcasting

In Scotland, two-thirds (65%) of those who had watched a PSB channel in the last six months said they were satisfied with PSBs overall; only one in ten (9%) said they were dissatisfied. The level of satisfaction among viewers in Scotland was broadly consistent with viewers across the UK: 67% of viewers of PSB services UK-wide said they were satisfied with it; only 12% said they were dissatisfied.

**Figure 19: Audience satisfaction with PSB channels overall**



Source: Ofcom PSM Tracker 2021, Q28. And now, if you think about ALL the public service broadcaster channels combined, how satisfied are you that combined they provide the different elements asked about in the previous question? Base: All in country who have watched any PSB channel or service in last 6 months (Northern Ireland=317, Scotland=291), Wales=301, UK=2917).

### Seven in ten PSB viewers are satisfied with STV, Channel 4 and BBC One

When asked to consider PSB channels individually, about seven in ten say they are satisfied with STV (73%), Channel 4 (72%) and BBC One (70%). About two-thirds say the same of Channel 5 (66%), BBC Two (64%) and BBC Scotland (63%).



**Figure 20: Audience satisfaction with individual PSB channels**



Source: Ofcom PSM Tracker 2021, Q23. Satisfied Summary - Thinking about some of the specific channels you have watched in the last 6 months, overall, how satisfied or dissatisfied are you with these TV channels? Base: All those in Scotland who have watched the channel in the last 6 months.

## For those in Scotland, trusted and accurate news is the most important attribute of PSB

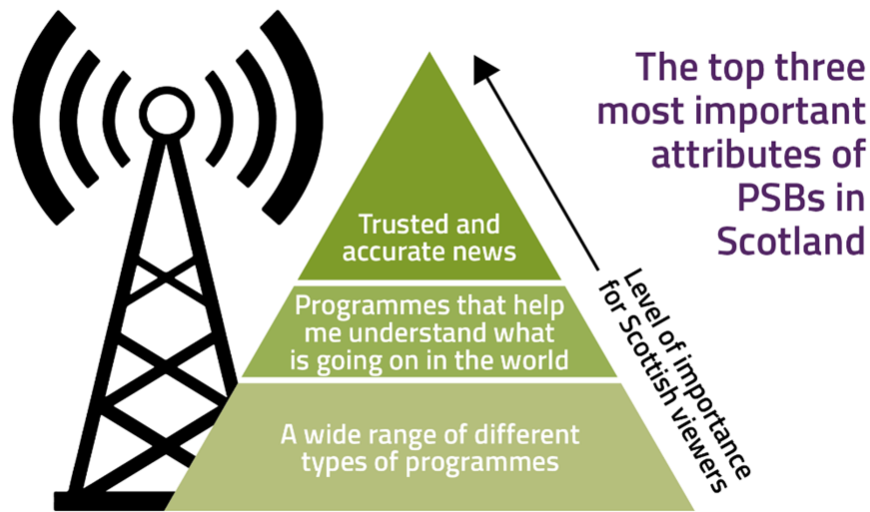
Among those in Scotland,<sup>13</sup> 'trusted and accurate UK news' was seen as the most important element of PSB, followed by 'programmes which help me understand what is going on in the world today', and 'a wide range of different types of programmes, such as drama, comedy, entertainment and sport'. People in Scotland place greater importance on regional content than the UK as a whole; 'regional programmes that keep me informed about my area' and 'programmes that feature Scotland'<sup>14</sup> both score more highly.

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<sup>13</sup> This question was asked of all respondents who completed the survey online, excluding those who completed over the telephone.

<sup>14</sup> For respondents in England, the phrasing was 'programmes that feature my region', and for Wales 'programmes that feature Wales, and for Northern Ireland 'programmes that feature Northern Ireland'.

Figure 21: The top three most important attributes of PSBs in Scotland



Source: Ofcom PSM Tracker, Q27. We now want you to think what you feel is most important for 'public service broadcasters'. For each set of 5 options, please select the one you feel is most important to society overall, and which would be the least important? Base: All respondents who completed online in Scotland: Total (305)

Regarding delivery, 'programmes made for UK audiences' (68%), and 'a wide range of different types of programmes, such as drama, comedy, entertainment and sport' (65%) are seen as being delivered well by PSB overall, by viewers in Scotland. This is followed by 'programmes which help me understand what is going on in the world today' (63%) and 'appeals to a wide range of different audiences' (60%).

**Figure 22: Delivery of PSB attributes**



Source: Ofcom PSM Tracker 2021, Q26. Well (7-10) Summary - How well or badly would you say they provide ...? Base: All those in Scotland who have watched PSB channels or services in the last 6 months (n=291).

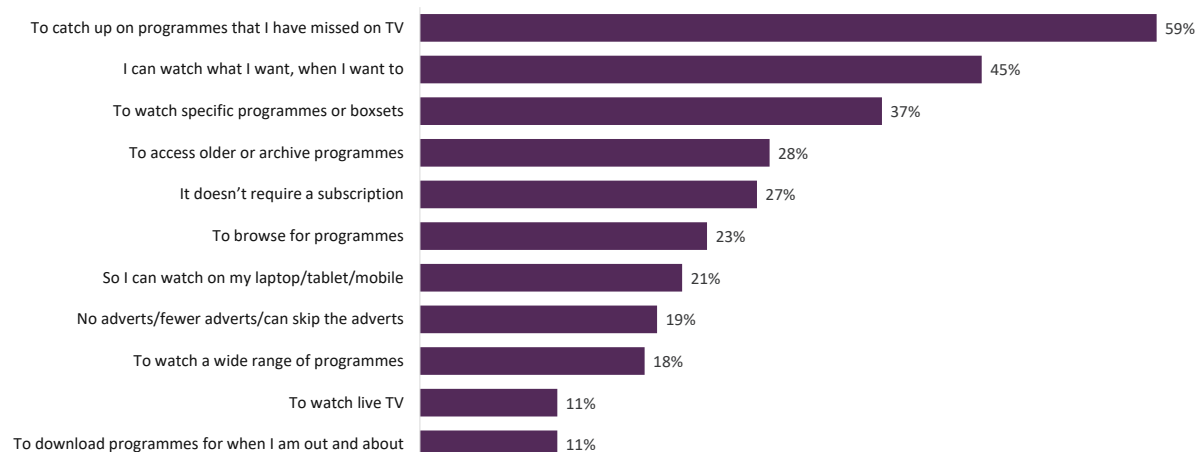
Looking at the highest-rating PSB attributes for individual broadcasters, there were differences in views about delivery, among audiences in Scotland. For BBC TV channels, two-thirds (65%) of those in Scotland who had watched in the past six months said they delivered well on ‘programmes made for UK audiences’, while a similar proportion said they delivered well for ‘programmes that help me understand what is going on in the world today’ (63%), ‘broadcast events that bring the nation together for a shared viewing experience’ (62%) and ‘programmes I can watch and talk about with people I know’ (62%).

When asked about STV and ITV channels, two-thirds (65%) said they performed well for ‘programmes that feature Scotland’, while three in five (60%) said the same for ‘programmes made for UK audiences’. Channel 4 TV channels were seen to deliver well on ‘programmes made for UK audiences’ (57%) and ‘programmes that feature people from different backgrounds’ (53%). For Channel 5 channels, ‘programmes made for UK audiences’ (46%) and ‘programmes which feature people from different backgrounds’ (45%) were the top-ranking attributes.

### **Audiences were generally satisfied with the BVoD services provided by PSBs**

Almost seven in ten (68%) respondents in Scotland said it was important that PSBs provide catch-up, on-demand or streaming services. The main reasons for using BVoD services was to catch up on programming (59%), and the convenience of watching programmes whenever they want (45%). Watching specific programmes or box-sets (37%) and accessing older or archive programming (28%) were the next most popular reasons. About one in ten (11%) said they used these services to watch live television.

**Figure 23: Reasons for using BVoDs in Scotland**



Source: Ofcom PSM Tracker 2021, Q33. Why do you use these services? [NB- Coded responses to open question] Base: All those in Scotland who watched BVoD channel in past 6 months: (242).

When asked about BVoD services, three-quarters (76%) said they were satisfied with BBC iPlayer. This was followed by All4 (71%), ITV Hub (63%), STV Player (60%) and My5 (59%).<sup>15</sup>

**Figure 24: Audience satisfaction with selected BVoD services**



Source: Ofcom PSM Tracker 2021, Q39. Satisfied Summary - Overall, how satisfied or dissatisfied are you with these TV catch-up, on-demand or streaming services? Base: All those in Scotland who have watched platform in last 6 months (N.B. not all services listed here due to low base size).

Looking at the delivery of attributes by the individual PSB BVoDs, BBC iPlayer was seen as performing well across a number of attributes for viewers in Scotland; seven in ten (72%) said it does well on delivering ‘a wide range of different types of programmes, such as drama, comedy, entertainment and sport’ and ‘programmes made for UK audiences’ (69%). Viewers in Scotland also see BBC iPlayer as delivering well on ease of use; just over two-thirds think it performs well for being ‘easy to find something I want to watch’ (67%) and ‘provides services that are easy to find my way around’ (68%).

<sup>15</sup> These figures include satisfaction with the paid-for equivalents All4+, ITV Hub+ and STV Player VIP.

For STV Player, two-thirds of viewers in Scotland said it performed well on delivering *'programmes that feature Scotland'* (67%) and half (50%) said it provided *'programmes that feature people like me'* well. About three in five (62%) said it did well on delivering *'programmes made for UK audiences'*.

All4 performs well on elements relating to distinctiveness and creativity. Just under three in five (57%) said it did well on providing *'programmes that help me see things from a different angle/perspective'* and half (51%) said the same for *'programmes that are different in their approach to other providers'*. About three in five said it was *'easy to find something I want to watch'* (61%) and *'provides services that are easy to find my way around'* (59%).

For My5, about half of those who had watched in the last six months said it delivered well on *'programmes made for UK audiences'* (54%), *'provides services that are easy to find my way around'* (51%) and *'programmes which feature people from different backgrounds'* (51%).

The main reason people gave for not watching BVoD services was because of the content available on them. Other reasons included preferring other services, not being aware of a service or having no access to, or difficulty using, the service.

***"Don't like the ads and there isn't an awful lot of content that interests me."* Man, 45-54**

***"I see everything on normal tv channels, I just don't need a catch up."* Man, 35-44**

***"Not interested in what they show."* Female, 25-34**

***"Have enough to watch on main channels"* Female, 55-64**

## **TV programming for and from Scotland**

The BBC and STV provide programming specifically for viewers in Scotland across a range of genres, most of which is news output from across Scotland. There was a 23% increase in spending on first-run content for viewers in Scotland in 2021, with spend on non-news/non-current affairs increasing most, at 52%. Non-news/non-current affairs accounts for the largest share of first-run spend (57%) in Scotland.

BBC hours of first-run content in Scotland dropped by 3% in 2021 to 1,473 hours. Overall, news content makes up the largest amount of the BBC's output for Scotland, comprising 55% of first-run hours.

Scotland is also an important source of production for PSB content shown across the UK. Some 7% of qualifying network spend on the PSB channels was on Scotland-based productions in 2021.

### How we report spend on programming

The analysis in this section covers programming made in Scotland for viewers in Scotland as well as programming made in the nation and broadcast UK-wide. It focuses on first-run UK originations, which are programmes commissioned by or for a licensed public service channel with a view to their first showing on television in the UK in the reference year.

Spend on this content includes all costs incurred by the broadcaster associated with making programmes. These include both direct and indirect production costs for in-house productions and licensing costs for commissioned programmes, but exclude costs related to marketing and distribution.

Financial data quoted in this report is presented in nominal terms, meaning that historical data has not been adjusted to account for inflation. In our interactive report, users can view financial data in either nominal or 'real' (CPI-adjusted) terms, with users able to easily switch between the two.

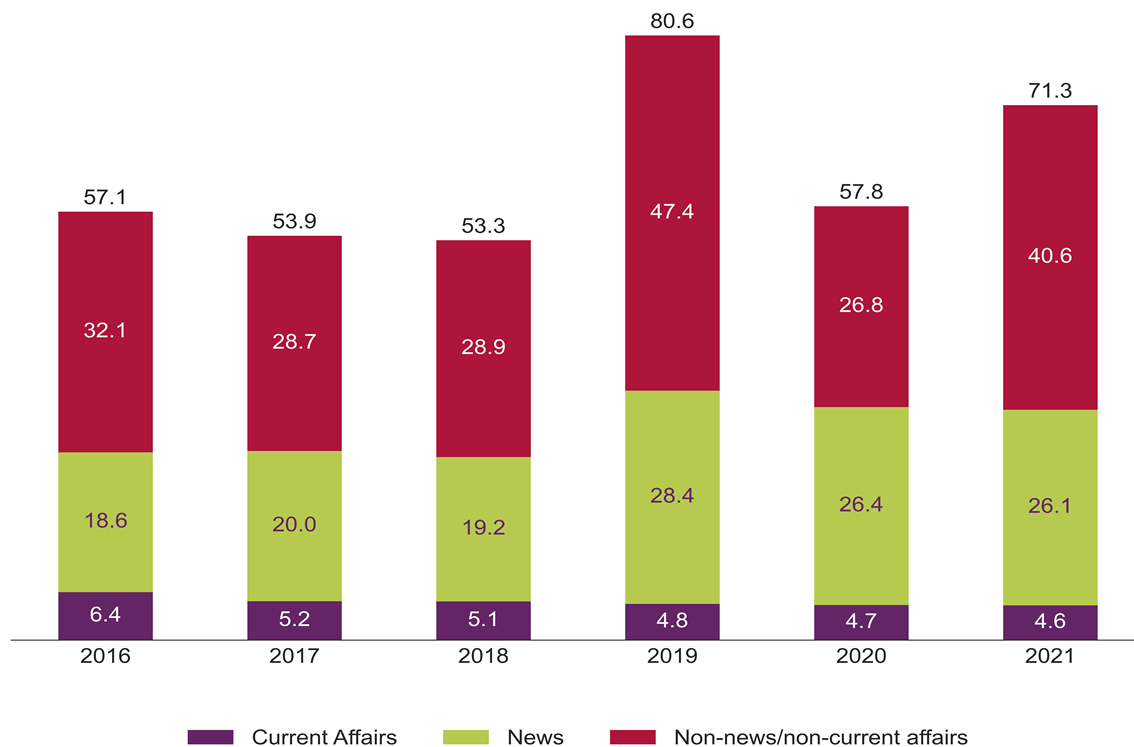
Our use of nominal data in the written reports provides a straightforward view of the market in terms commonly used. For those that wish to analyse how inflation has historically affected the value of the industry, the CPI-adjusted series in our interactive report provide an indicative measure.

### PSB spend on first-run content for Scotland rose to £71.3m in 2021

There was an 23% increase in spending on first-run content for viewers in Scotland in 2021. Of the total £71.3m spend, the majority went towards non-news/non-current affairs, at £40.6m; a year-on-year rise of £13.8m.

Non-news/non-current affairs had the largest relative growth in first-run spend, increasing by 52% year on year to £40.6m. PSB spend on news programming for Scotland has decreased by 1%, with spend on current affairs programming also down by 1% compared to 2020.

**Figure 25: PSB spend on first-run UK-originated content for Scotland, by genre: 2016-2021 (£m)**



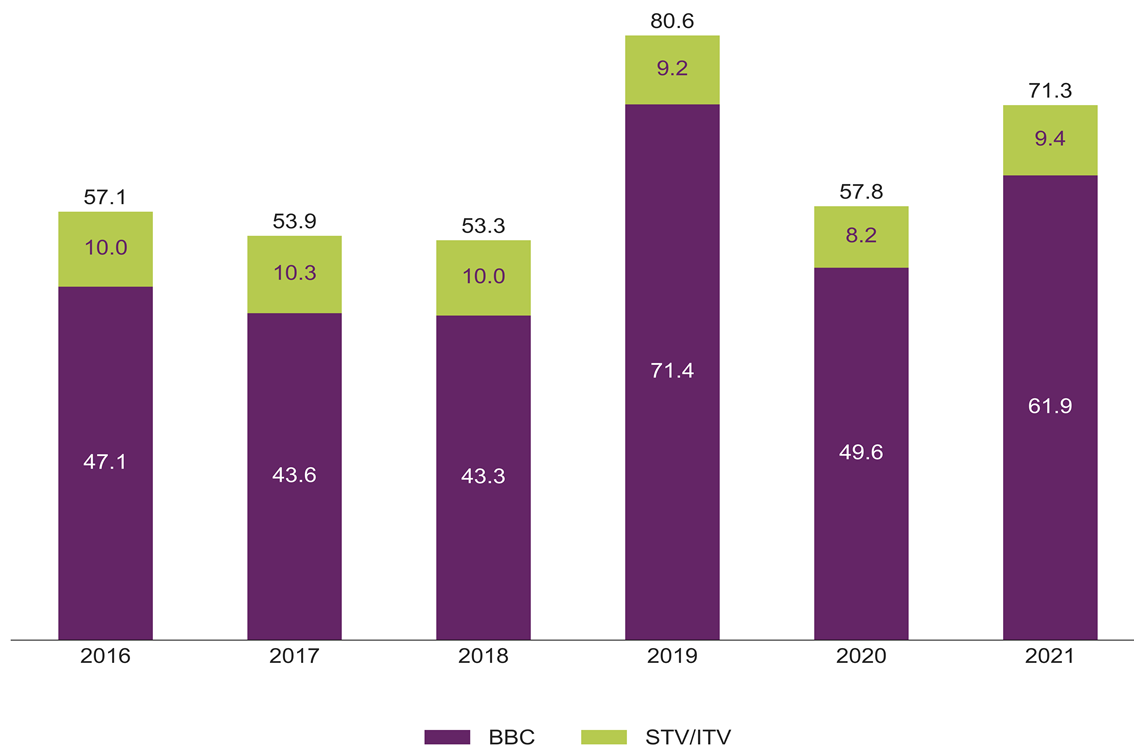
Source: Ofcom/broadcasters.

### **Both BBC and STV/ITV spend increased in 2021**

Spend across both the publicly funded and commercial PSBs increased in 2021, following a year in which there were significant decreases in spend due to the pandemic. The increase in spend on first-run content was driven mostly by the BBC, whose spend on content specifically for audiences in Scotland rose by 25% to £61.9m.

Spend by STV/ITV on first-run content for Scotland also increased in 2021; by 15% to £9.4m.

**Figure 26: BBC and ITV/STV spend on non-network first-run UK-originated content for Scotland: 2016-2021 (£m)**



Source: Ofcom/broadcasters.



### **Ofcom looks to update its regulation of the BBC**

What audiences want, and how they watch and listen to content, is changing. Ofcom's regulation should enable the BBC to respond to this changing behaviour to ensure it remains effective, now and in the future. In line with this, Ofcom published a consultation, Modernising the BBC's Operating Licence, in June this year. This proposed:

- retaining the requirement on news for BBC One Scotland, BBC ALBA and BBC Scotland, and that at least 90% of first-run UK originations must be made in Scotland;
- replacing hours of non-news programming quotas for BBC One Scotland with conditions for delivering this content. This change aims to provide the BBC with more flexibility to deliver programming on iPlayer as well as on TV;
- introducing transparency requirements for delivering programming for the nations, requiring the BBC to set out its plans for providing a range of non-news and non-current affairs content for the nations in its Annual Plan, and then reporting on its delivery alongside its Annual Report;
- adding a requirement for the provision of non-news and non-current affairs content and transparency requirements for BBC Scotland; and
- requiring the BBC to set out its plans for providing a range of content for the nations on iPlayer and to report on delivery alongside its Annual Report.

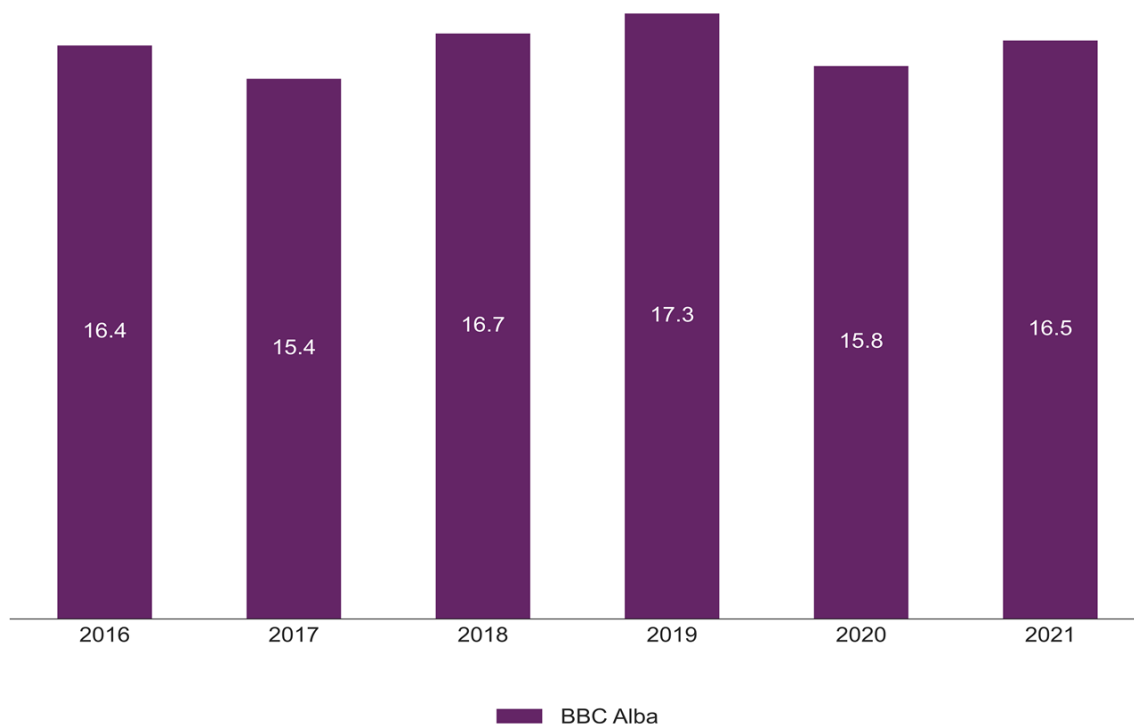
Ofcom will issue a final statement and an updated Licence, reflecting stakeholders' comments on our proposals, early next year.

### **BBC ALBA's spend on first-run content rose in 2021**

BBC ALBA, the Gaelic-language channel run in partnership between MG ALBA and the BBC, spent £16.5m on first-run programming in 2021, an increase of approximately £0.7m compared to 2020. It broadcast 610 hours of first-run content in 2021, an increase on 2020 (556).

Eòrpa continued to lead the channel's current affairs output in 2021, winning the News and Current Affairs category at the Royal Television Society Scotland Awards for its coverage on the historic links between the Highlands and the slave trade. In addition, December 2021 saw the finale of *Bannan* broadcast on the channel, ending its eight-season run that began in 2014.

**Figure 27: BBC ALBA spend on first-run UK-originated content (£m)**



Source: Ofcom/broadcasters.

### MG ALBA’s vision for Gaelic media

MG ALBA delivers Gaelic-language media across a range of platforms, including programming for Gaelic speakers across Scotland through its partnership with the BBC. MG ALBA recently published its *Lèirsinn: A Route Map for Gaelic Media*<sup>16</sup>, setting out its strategy for how Gaelic public service media might be a catalyst for the Gaelic language and cultural development between 2022 and 2027. The proposals include expanding the online and linear presence of Gaelic media to reach at least one million people each week in the UK and internationally; engaging younger Gaelic speakers; and supporting up to 250,000 new learners of Gaelic. Delivery of Gaelic media content on digital platforms is an essential part of reaching this goal, as is continued investment in high quality linear television.

### BBC hours of first-run content in Scotland dropped by 3% in 2021 to 1,473 hours

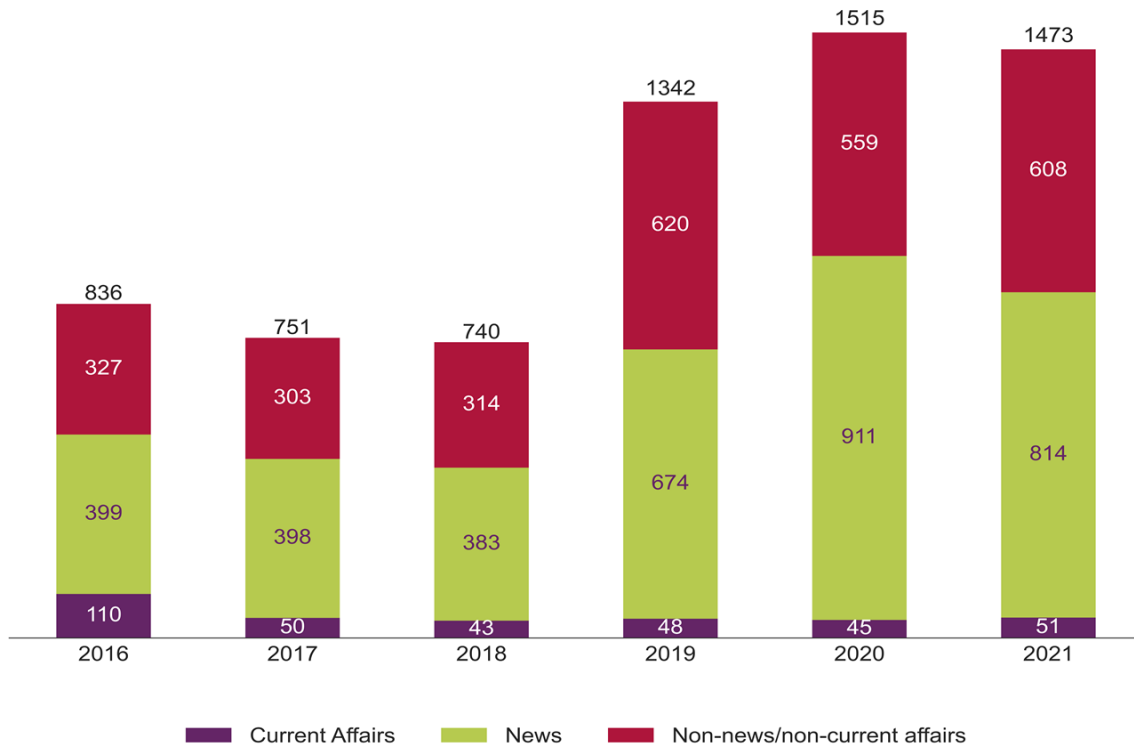
The decline in hours has been entirely due to news, down by 97 hours since 2020. The largest proportional increase was in current affairs (13%), growing by 6 hours to reach 51 hours. There was a 9% increase in hours of non-news/non-current affairs content, rising to 608 hours in 2021. A programming highlight in 2021 was the return of Scottish thriller-series *Guilt* for a second season.

<sup>16</sup> MG ALBA, [Lèirsinn: A Route Ma for Gaelic Media](#)

Since launching in 2019, *Guilt* has accumulated over 11 million streams on BBC iPlayer<sup>17</sup> and has been recommissioned for one final season.

Overall, news content made up the largest amount of the BBC’s output for Scotland in 2021, comprising 55% of first-run hours.

**Figure 28: BBC hours of first-run UK-originated content for Scotland, by genre: 2016-2021**



Source: Ofcom/broadcasters.

<sup>17</sup> BBC, [BBC Group Annual Report and Accounts 2021/22](#), July 2022.

### The BBC in Scotland

The BBC's Across the UK strategy aims to shift BBC operations away from London between 2022 and 2027 and make it more UK-wide. In Scotland, the BBC has made a range of commitments to improve representation and investment, and to develop new talent.

- The BBC will increase its operations in Glasgow, physically expanding its BBC Studios bases as well as moving the Technology reporting team there.
- The BBC will double the number of nations' co-commissions, including those from Scotland, which appear on UK-wide channels.
- Over the next three years more than a hundred drama and comedy titles will reflect the lives and communities of audiences outside London, of which at least 20 will portray Scotland, Wales or Northern Ireland.
- As well as renewing its partnership with Screen Scotland, the BBC has committed to modernising the BBC/MG ALBA partnership and developing BBC ALBA and BBC Radio nan Gàidheal services to increase their digital impact.

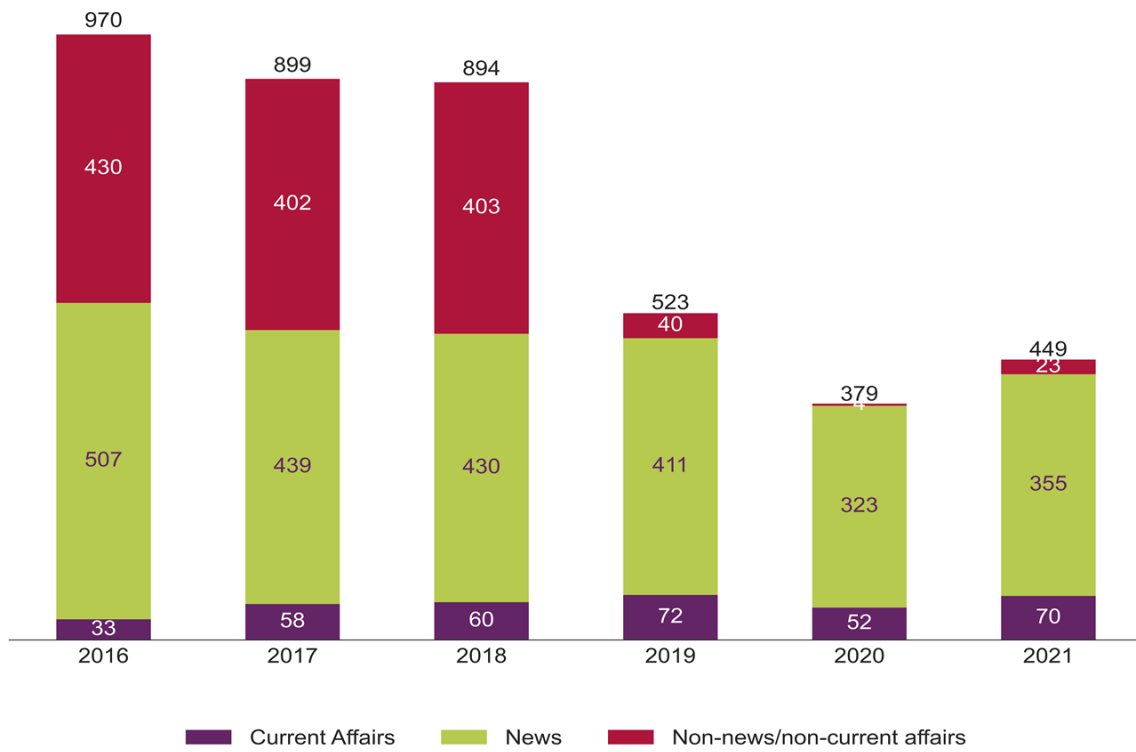
### STV's hours of first-run content for Scotland grew year on year, with 449 hours of programme output in 2021

The vast majority of STV's output for viewers in Scotland was news content in 2021; news comprised 79% (355 hours) of first-run programming on the channel. This was led by *STV News at Six* which serves both central and north Scotland, with locally relevant bulletins at 6pm on weekdays.

The increase in hours has been across all genres. The largest rise has been for non-news/non-current affairs, growing by 20 hours to reach 23 hours and including *Don't Waste Scotland*, which was broadcast to coincide with the COP26 conference in Glasgow.

In addition to the STV output displayed in the chart below, ITV provided 75 hours of first-run originated programming for the Border Scotland region. This was a return to levels seen before the pandemic, and an increase of 16 hours compared to 2020.

**Figure 29: STV hours of first-run UK-originated content for Scotland, by genre: 2016-2021**



Source: Ofcom/broadcasters. Note: the decline in STV's hours of non-news/non-current affairs programming since 2018 was linked to the closure of the local TV service STV2 and a reduction in overnight output.

### Renewing Channel 3 licences

STV and ITV's Channel 3 licences are due to expire in December 2024. Under Section 229 of the Communications Act 2003, Ofcom submitted a report to the UK Government in June this year in anticipation of a new licensing round for Channel 3 services.<sup>18</sup> The purpose of this was to assess the capacity of existing licence holders to continue fulfilling their public service broadcasting obligations.

Ofcom concluded that there is a good case to proceed with the renewal of the licences, finding that:

- Channel 3 licence holders have a good track record of delivering public service content to audiences and are likely to continue doing so over the next licence period.
- The channels continue to be valued by audiences: almost half of all people in the UK watch Channel 3 each week and viewer satisfaction is high, at 75%.
- The licensees play an important role in the UK production sector.
- Current licence obligations could be commercially sustainable over the next licence period, but benefits are likely to reduce over time. Sustainability would be strengthened, however, by the implementation of the UK Government's proposed legislative reforms to prominence regulation.

## Network content produced in Scotland

### The proportion of network spend on first-run content produced in Scotland increased in 2021

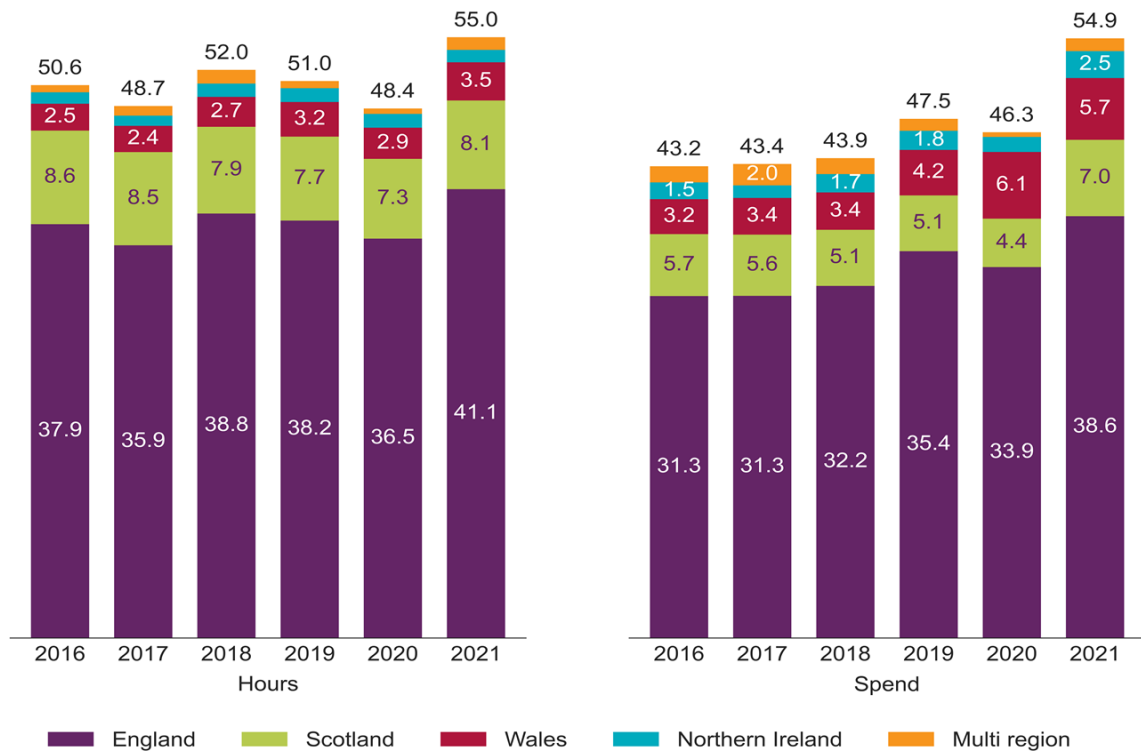
Public service broadcasters must make programmes that are to be broadcast for the first time on their network TV channels in a range of locations around the UK. The broadcasters have quotas relating to this, in terms of the proportion of qualifying hours and the proportion of qualifying spend that must be outside London. The BBC has individual quotas for each of the UK nations, and Channel 4 has an out-of-England quota. ITV and Channel 5 are not specifically required to make content outside England.

Across all the PSBs, 7% of qualifying first-run network spend, and 8.1% of hours, was allocated to programmes qualifying as Scotland productions. This was the greatest proportion of hours made in Scotland since 2017, and the highest proportion of spend in Scotland in over a decade.

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<sup>18</sup> Ofcom, [Licensing of Channel 3 and Channel 5: Report to the Secretary of State](#), June 2022.

**Figure 30: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2016-2021 (%)**



Source: Ofcom/broadcasters.

### The value of Scotland's screen sector

In 2021, Screen Scotland commissioned an economic impact study to calculate the screen sector's contribution to Scotland's economy.<sup>19</sup> The report covers the value chain of film, TV and other audio-visual content in 2019, from development and production to distribution and sales. It measures economic impact through full-time equivalents (FTEs) and gross value added (GVA).

The report found that in 2019:

- Scotland's screen sector generated 10,280 FTEs and £567m GVA.
- Development and production of screen content was the largest source of GVA in Scotland's screen sector.
- PSBs were the main driver of TV programme commissions in Scotland. Of the £398m spent on development and production in Scotland, nearly half (£196.6m) came from PSB content.
- PSBs spent a further £61.1m on their broadcasting support operations such as transmission, sales and marketing, and administration (non-content aspects) in Scotland.
- Film and TV played a significant part in attracting visitors to Scotland, with screen tourism generating £55m GVA.
- The BBC television services and Channel 4 accounted for 87% of all PSB expenditure in Scotland in 2019.

### The BBC was the PSB with the greatest proportion of network spend in Scotland in 2021

Alongside the other PSBs, the BBC, which is responsible for the majority of qualifying network content made in Scotland, increased the proportion of its network spend in Scotland to 8.6% in 2021, although the proportion of hours reduced slightly to 15%. This included primetime Saturday night quiz show *The Hit List* and the sitcom *Two Doors Down*.

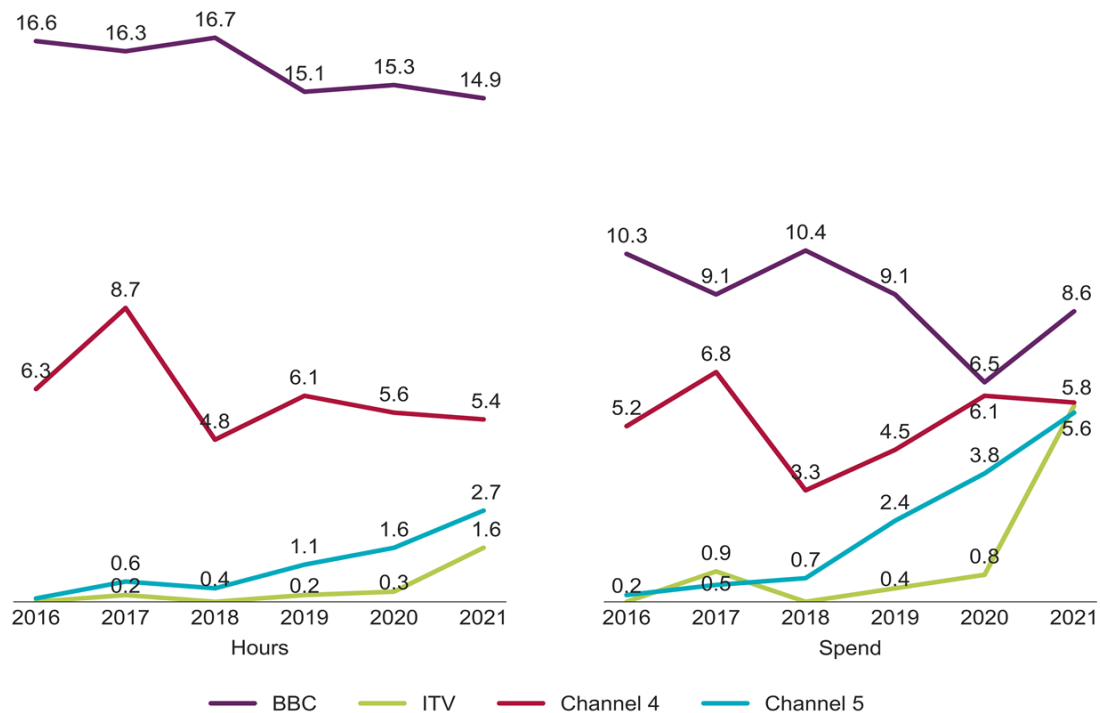
The commercial PSBs spent broadly the same proportion of their spend on network content produced in Scotland in 2021. This included titles such as *Murder Island* on Channel 4, *Wonders of Scotland with David Hayman* on ITV and Channel 5's *Susan Calman's Grand Days Out*.

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<sup>19</sup> Screen Scotland, [The Economic Value of the Screen Sector in Scotland in 2019](#), June 2022.



**Figure 31: Proportion of qualifying network production in Scotland, by PSB: 2016-2021**



Source: Ofcom/broadcasters.

### STV Studios in action

As well as delivering PSB content with its broadcasting division, STV makes programmes through its production division, STV Studios, delivering commissions for the BBC, ITV, Channel 4 and Discovery.

Popular productions by STV Studios include *The Victim* and *Antiques Road Trip* for the BBC and *Catchphrase* for ITV. Earlier this year, Channel 4 commissioned a second series of prison drama *Screw* from STV Studios, following a successful first series. Like the first series, it will be filmed in Glasgow's Kelvin Hall, where a three-storey prison set was built in the historic venue for the first series.

# Radio and audio

## Introduction

Radio continues to be popular in Scotland, and alongside TV screen viewing and online activities, continues to account for a considerable amount of time spent on entertainment services. As in previous years, BBC network radio stations account for the largest share of listening, while Bauer remains the most listened-to commercial network in Scotland.

Online radio listening has increased its share of overall listening, at the expense of analogue and DAB, but smart speakers have not had the same impact in Scotland as in the UK overall; their share of listening is below the UK average.

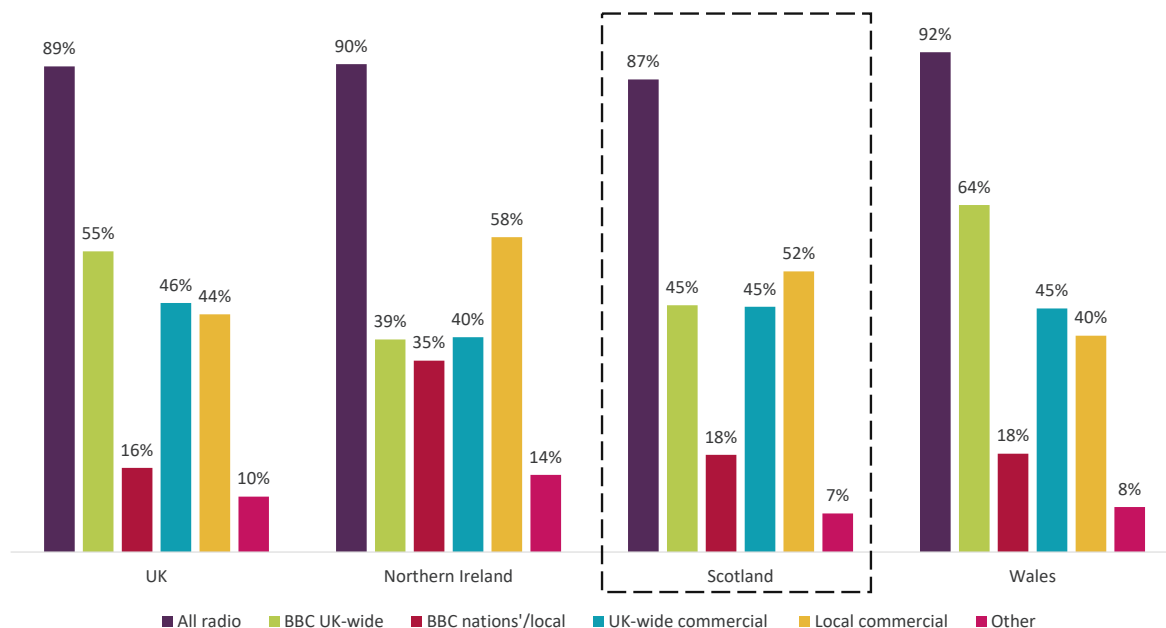
The popularity of music streaming continues to grow and in Scotland it is now as popular as listening to live radio on a radio set.

## Radio listening in Scotland

### **Nearly nine in ten adults listened to radio in Scotland for an average of about 20 hours each week in Q1 2022**

An average of 87% of adults in Scotland listened to radio each week in the first quarter of 2022 – this is typically lower than in the other UK nations, especially Northern Ireland (92%). There are, however, differences when comparing the radio sectors across the nations. For example, local commercial radio stations are more popular in Scotland than in the UK overall, and in particular when compared to Wales: 52% listen to these stations each week in Scotland compared to 40% in Wales. In contrast, the BBC's UK-wide networks reach 45% of adults in Scotland, ten percentage points below the UK average (55%) and well below their reach in Wales (64%).

**Figure 32: Weekly reach by sector, by nation: Q1 2022**



Source: RAJAR Q1 2022; Northern Ireland = BBC Radio Ulster TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA

### Ofcom awards C-DSP licences for community radio stations in Scotland

In 2020, Ofcom introduced C-DSP licences, a new type of community radio station licence for those wishing to broadcast on DAB digital radio. While they are primarily for broadcast via small-scale radio multiplex services, they also allow for broadcast on local radio multiplex services. Licence-holders might be existing analogue community radio services which want to make themselves available to local communities on DAB as well as analogue, or new services wanting to broadcast on DAB only.

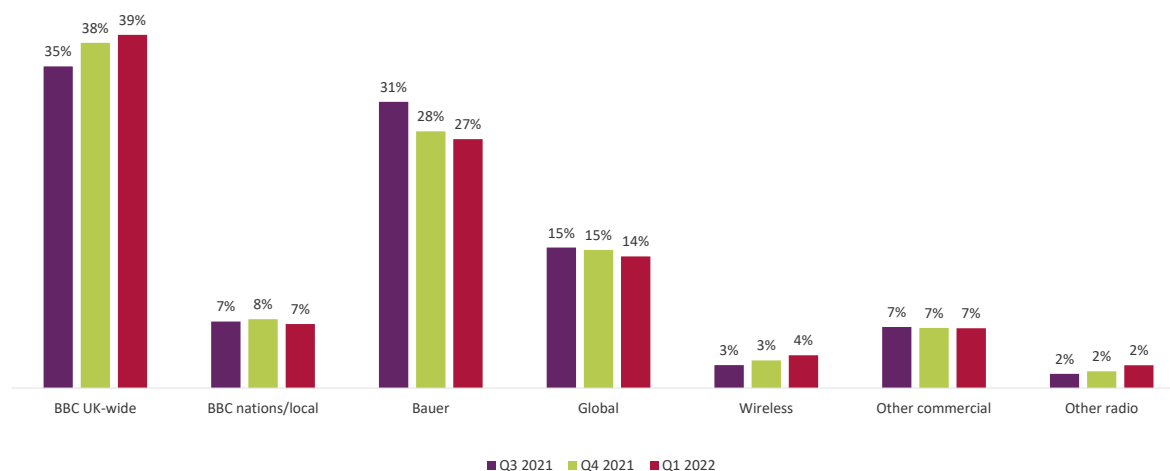
Since 2021, Ofcom has awarded C-DSP licences to Awaz FM, Celtic Music Radio, Jambo! Radio and Paisley FM for broadcast on the Glasgow small-scale DAB multiplex, as well as Lomond Radio in Inverclyde and Heartsong Live in Edinburgh.

### Bauer continues to be the most listened-to commercial group in Scotland

About 39% of total radio listening hours are accounted for by BBC network radio stations, with a further 7% to nations' and regions' stations like BBC Radio Scotland.

Bauer accounts for the greatest share of commercial radio listening, with 27% of total hours being to stations such as Forth 1, MFR and Tay FM. This compares to 14% for Global services such as Heart and 4% for Wireless stations such as Virgin Radio.

**Figure 33: Market share of all radio listening, by radio group: 2021-2022**



Source: RAJAR; BBC Radio Scotland TSA

### Bauer picks up awards for its radio broadcasting in Scotland

Bauer Audio UK won a series of awards for its radio broadcasting across Scotland this year. At the Audio and Radio Industry Awards 2022, Clyde 1 won the John Myers Award for Local Station of the Year. The station, which broadcasts to Glasgow and West Central Scotland, also picked up several silver and bronze awards, including for Best Music Entertainment Show and Best Music Breakfast Show. Another Bauer station, Clyde 2, won the silver award for Best Local Radio Show. Both stations were also recognised for their news coverage in Scotland at the Commercial Radio Awards this year, receiving nominations for Best News Story or Coverage and Best News Special or Campaign.

Earlier in the year, Bauer’s Forth 1 and Forth 2, which broadcast to Edinburgh, Lothian and Fife, moved to new studios at the St James Quarter shopping centre in Edinburgh.

## Digital listening in Scotland

### Coverage of local DAB services in Scotland was unchanged as of March 2022

Coverage of national DAB multiplexes in Scotland has remained constant in recent years. While overall UK local DAB multiplex coverage grew slightly between March 2021 and March 2022, following the launch of local multiplexes in England, coverage for homes in Scotland remained steady at 85.4%.

**Figure 34: Coverage of DAB services: March 2022**

		BBC UK-wide	Commercial		
			Digital One	Sound Digital	Local DAB
UK	Homes	97.4%	91.7%	82.6%	92.0%
	Major roads	87.4%	80.2%	72.6%	76.8%
England	Homes	98.4%	94.8%	86.7%	93.4%
	Major roads	94.5%	93.9%	89.8%	87.4%
Scotland	Homes	95.3%	81.7%	69.0%	85.4%
	Major roads	69.1%	45.5%	33.6%	45.6%
Wales	Homes	92.2%	67.5%	56.9%	82.6%
	Major roads	78.1%	53.3%	37.7%	60.9%
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%
	Major roads	79.3%	86.9%	55.0%	87.8%

Source: Arqiva, BBC, Ofcom

### Scotland's first permanent small-scale DAB service goes live

In July 2022, Scotland's first small-scale DAB multiplex launched in Edinburgh. Among the radio stations included in the service was the new station, Edge Radio, which will focus on current and upbeat music for listeners in Edinburgh.

Following this, Ofcom began advertising for round four of small-scale radio multiplex licensing in July across the UK.<sup>20</sup> In Scotland, six areas are being advertised: Berwickshire & North Roxburgh; East Fife; Inverclyde; Glenrothes & Kirkcaldy; Kintyre, Islay & Jura; and Stirling & Falkirk. There is potential for Ofcom to license multiplexes carrying a range of services, including C-DSPs in these areas. The licences will be awarded in a competitive process, with applications judged against specific statutory criteria.

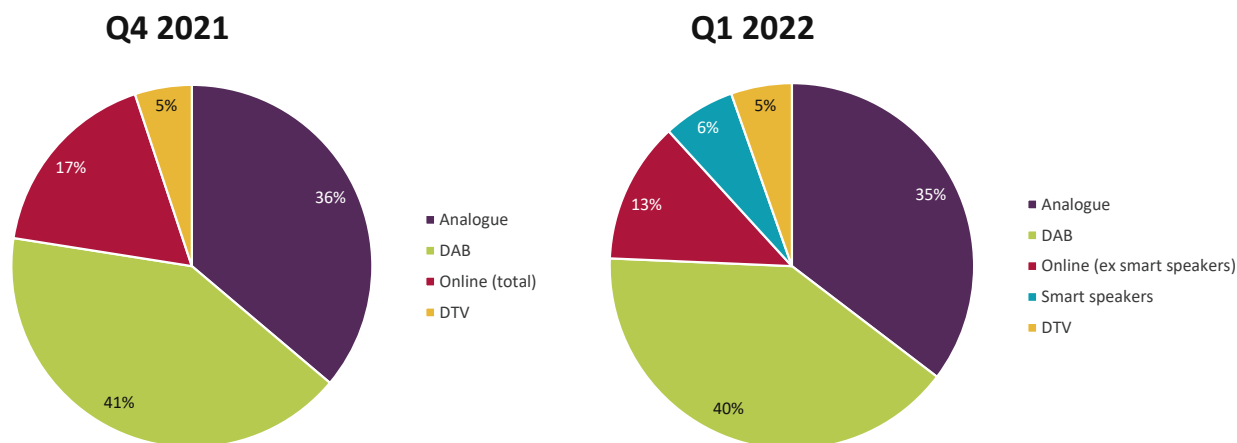
### Online radio listening has increased its share of overall listening, but smart speakers have not had the same impact as they have had on the UK overall

Although 71% of adults in Scotland own a DAB radio set (compared to 66% across the UK as a whole), DAB and analogue both lost out to online listening, which now accounts for about a fifth of

<sup>20</sup> Ofcom, [Advertisement of licences for small-scale radio multiplex services](#).

listening hours in Scotland. Listening through smart speakers accounts for only 6% of time in Scotland compared to 10% across the UK overall.

**Figure 35: Share of listening, by platform**



Source: RAJAR Q1 2022; BBC Radio Scotland TSA. Note: smart speaker data only available from Q1 2022.

### Community Radio Fund

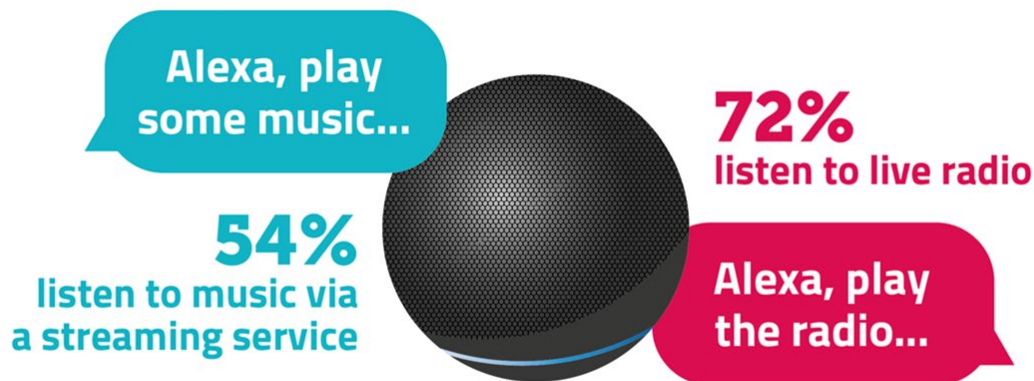
Ofcom’s Community Radio Fund supports the costs of running Ofcom-licensed community radio stations in the UK. Eligible stations broadcasting on AM, FM, or via a C-DSP licence on a digital radio multiplex can make an application for review by the Community Radio Fund Panel. In the 2021-22 round of awards, the Fund awarded £11,700 to Pulse Community Radio in Barrhead for the recruitment of a business development manager, and £12,770 to Kirkcaldy’s K107fm to appoint a fundraiser. In the first round of awards for 2022-23, Ofcom awarded £15,000 to TD1 Radio, which broadcasts in the Central Borders, to fund a business development manager.

### People in Scotland who have a smart speaker are more likely to use this device for listening to live radio

Among people aged 16+ in Scotland, 43% said they had a smart speaker in their home. The Amazon Echo was by far the most popular type (found in 87% of homes which own the device), followed by Google Home/Google Nest (9%).

Listening to live radio (72%) and to music via a streaming service (54%) were the most popular uses of smart speakers in Scotland. Their owners were significantly more likely than those in the UK overall (59%) to use their device for live radio, and were also significantly more likely to use their smart speaker for getting news reports, weather reports, travel information and searching for information. On the other hand, people in Scotland were less likely to use the device for setting alarms, controlling smart home devices, making calls, or sending texts or emails.

Figure 36: Smart speaker use in Scotland



Source: Ofcom Technology Tracker 2022.

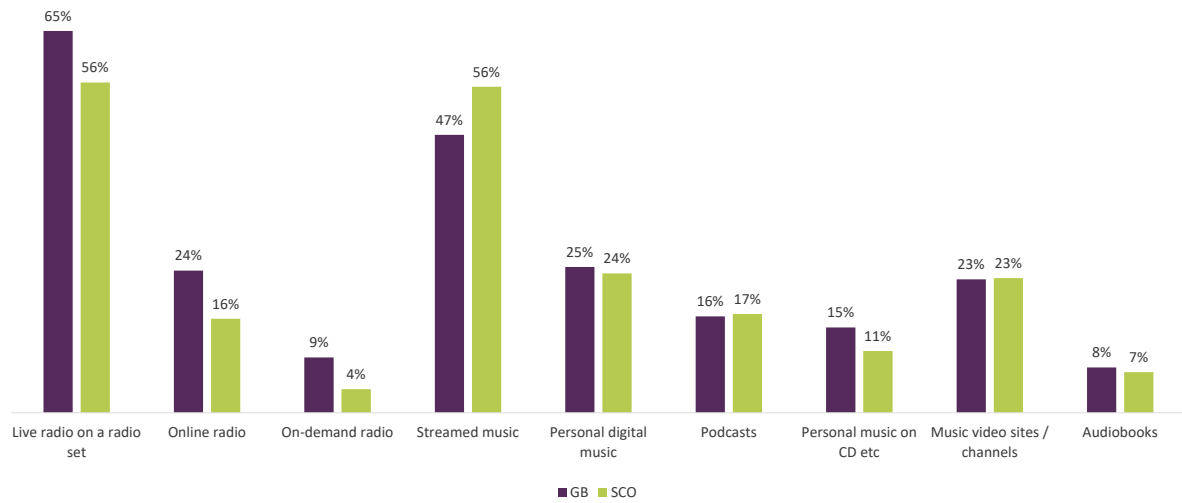
## Audio trends

### Music streaming is now as popular as live radio on a radio set in Scotland

While the patterns are broadly similar, there are some notable differences in the weekly reach of different audio types between Scotland and Great Britain as a whole. Listening to live radio on a radio set, and via online radio, are both less popular among adults in Scotland than in Great Britain, as is listening to personal music on analogue formats. The reach of podcasts, music video sites / channels and audiobooks are much the same, while the reach of music streaming is higher in Scotland than in GB (56% vs 47%).

The two most popular activities overall are listening to live radio on the radio set and listening to streamed music, both of which are carried out by 56% of the population on a weekly basis.

**Figure 37: Weekly reach of different types of audio: Scotland vs Great Britain**

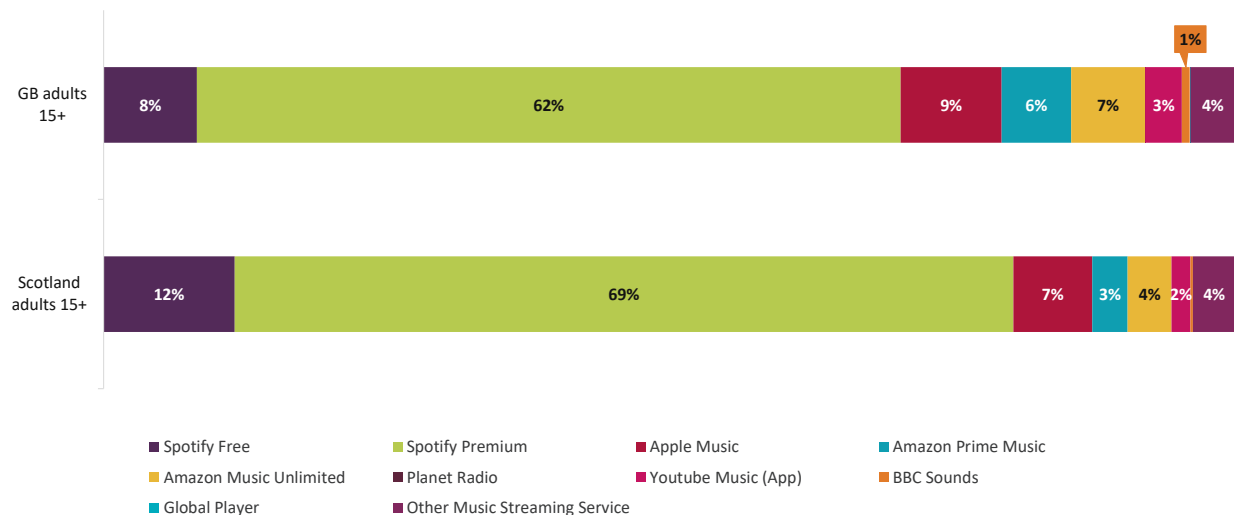


Source: IPA TouchPoints 2022 wave 1 – Jan-March 2022. Note: TouchPoints data exclude Northern Ireland.

### People in Scotland spend a greater proportion of their music streaming time listening to Spotify

The music streaming service which accounts for the greatest share of listening is Spotify: 81% of total music streaming time is attributed to this service, the vast majority of which is to Spotify Premium. Spotify accounts for a greater share of streaming time in Scotland than the GB overall figure (70%). In comparison, Apple Music and Amazon Music Unlimited both have a smaller share of streaming hours, at 7% and 3% respectively.

**Figure 38: Share of time spent music streaming, by platform: Scotland vs Great Britain**



Source: IPA TouchPoints 2022 wave 1 – Jan-March 2022. Note: TouchPoints data exclude Northern Ireland.



### **The BBC's Orchestral Review sees opportunity in the growth of digital streaming**

In March this year the BBC published a research report on the UK's classical music sector.<sup>21</sup> The review found that although classical audiences continue to skew older, the growth in digital streaming services has had a significant impact on the accessibility of classical music. Subsequently, there has been an upward trend in the number of young people listening to classical music. In Scotland, research found that audiences who are engaged with arts and culture show a significant degree of openness to engaging with classical music.

The review also found that, as the single biggest commissioner of new music works in the UK, the BBC has a central role in the UK's classical music ecosystem. BBC orchestras serve audiences across the UK, including in areas which major orchestras would otherwise not cover. In Scotland, the BBC was identified as a valuable platform for serving locally relevant niches, such as with the *Celtic Connections* festival held in Glasgow.

### **Most regular podcasts listeners in Scotland agreed that podcasts offer a lot more choice than radio**

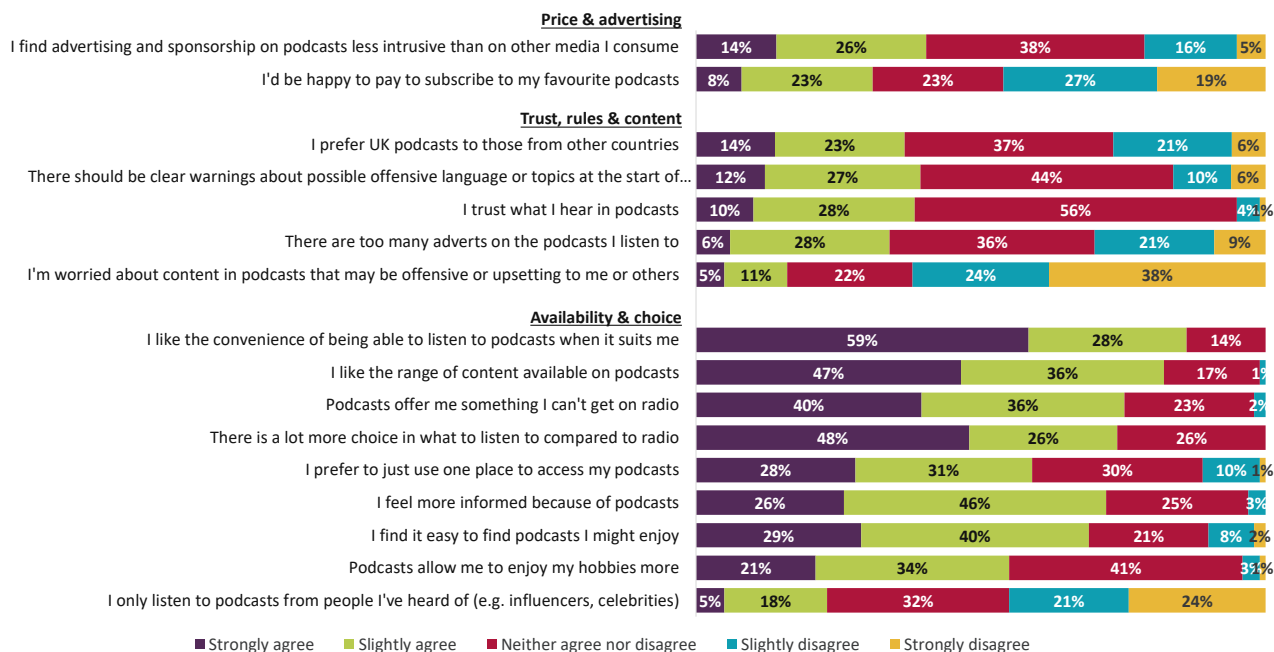
Music is not the only content that people access on streaming services: they also use them to listen to podcasts. Looking at data from Ofcom's 2022 podcast survey, we see that the qualities valued most highly by regular podcast listeners in Scotland were the convenience and range of content that podcasts offer. Just under three-quarters (74%) of regular podcasts listeners in Scotland agreed that podcasts offer a lot more choice compared to radio, and just under half (45%) disagreed with the statement "I only listen to podcasts from people I've heard of (e.g. influencers, celebrities)". This is interesting to compare with traditional radio listening, where listeners tend to tune into the same programme as part of a routine, e.g. when waking up or driving to/from work, and are familiar with the presenter.

Broadly, attitudes towards podcasts were very similar in Scotland and the rest of the UK, with very few statistically significant differences. But listeners in Scotland were less likely than those in England to prefer UK podcasts to those from other countries. Just under half (49%) of regular podcasts listeners in England agreed with the statement "I prefer UK podcasts to those from other countries" compared to about a third (36%) in Scotland.

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<sup>21</sup> BBC (BOP Consulting), [Research into the classical music ecosystem](#), May 2022.

**Figure 39: Attitudes to podcasts**

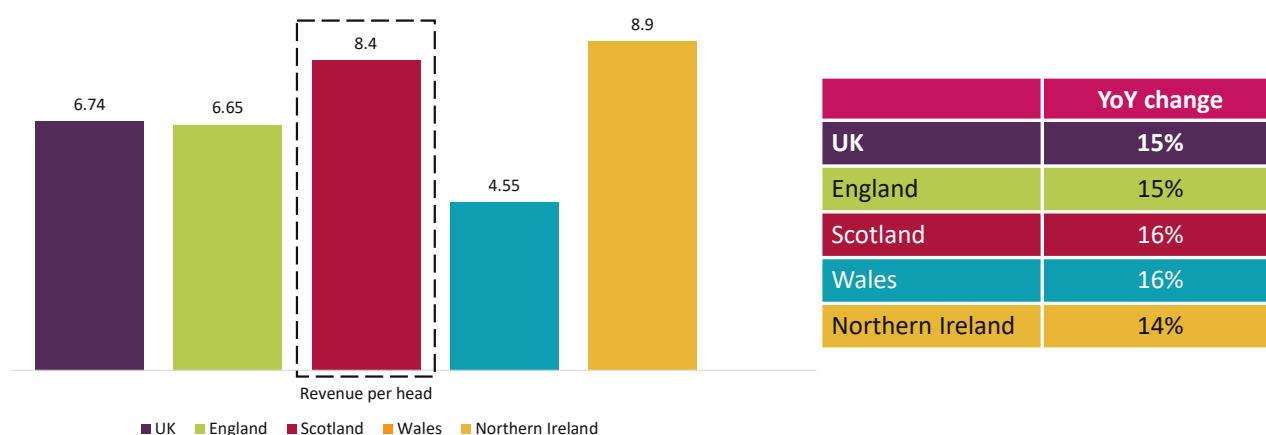


Source: Ofcom Podcast survey 2022 Q23. How strongly would you say you agree or disagree with the following? Base: all regular podcast listeners (unweighted base 131, weighted base 53)

## Per-capita commercial radio revenue in Scotland grew by 16% between 2020 and 2021

In 2021, per-capita commercial radio revenue in Scotland was £8.40, an increase of 16% on the previous year.

**Figure 40: Per-capita commercial radio revenue, by UK nation: 2021 (£)**



Source: Broadcaster returns, Ofcom analysis. NB: These figures solely relate to relevant turnover reported against AL licences (local analogue commercial) and include local and national revenues and sponsorship i.e. it is not just revenues which relate to adverts aimed at the specific nation. As mid-year 2021 population estimates for were not available at the time of publication, 2020 mid-year population data has been used for both 2020 and 2021.