

Media Nations 2020

Scotland report



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Overview

This *Media Nations: Scotland* report reviews key trends in the television and audio-visual sector as well as in the radio and audio industry in Scotland. The majority of the research relates to 2019 and early 2020 but, given the extraordinary events that surround the Covid-19 pandemic, Ofcom has undertaken research into how our viewing and news consumption habits have changed during this period. This is explored in the *Impact of Covid-19 on audiences and broadcasters* section.

The report provides updates on several datasets, including bespoke data collected directly from licensed television and radio broadcasters (for output, spend and revenue in 2019), Ofcom's proprietary consumer research (for audience opinions), and BARB and RAJAR (for audience consumption).

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

Key points

Impact of Covid-19 on audiences and broadcasters

- There was a significant increase in TV set viewing during the early stages of the Covid-19 pandemic. People in Scotland spent an average of 5 hours and 46 minutes per day watching something on the TV screen at the height of the lockdown in April 2020, an 85 minute increase on the figure for 2019.
- TV news reached an average of 73.5% of the population in Scotland each week in March 2020.
- BBC services were the most-used services for news about Covid-19 during the early stages of the lockdown. More than seven in ten (76%) online respondents in Scotland used BBC services during the first four weeks of the lockdown period.

TV services and devices

- At the beginning of 2020, some 59% of homes in Scotland had a TV connected to the internet through a smart TV or other device such as streaming sticks (e.g. Amazon Fire, Roku and Google Chromecast).
- More than half of households in Scotland (56%) had a subscription video-on-demand (SVoD) service from suppliers such as Netflix, Amazon Prime Video and NOW TV in Q1 2020. Netflix is the most popular and was present in nearly half of homes (49%).
- The BBC iPlayer was the most popular broadcaster video-on-demand (BVoD) player in Scotland at the beginning of 2020. It was watched in just over a third of Scottish homes (35%), followed by the STV Player (25%), All4 (18%) and My5 (15%).

Broadcast TV viewing

- People in Scotland watch the most broadcast TV of any UK nation. On average, people in Scotland spent 3 hours 22 minutes watching broadcast TV in 2019 (including consolidated 7-day viewing).
- The finale of series five of *Line of Duty* was the most-viewed programme in Scotland in 2019.
- BBC One and STV were the most-used sources of news in 2020 for people in Scotland.

TV programming for and from Scotland

- Spend on programming for viewers in Scotland rose significantly, by £26.3m to £80.6m in 2019, largely due to the launch of the new BBC Scotland channel in February 2019.
- The launch of BBC Scotland led to a large increase in the number of hours produced by the BBC for viewers in Scotland, rising by 81% to 1,342 hours in 2019.

Radio and audio

- The weekly reach of radio remained strong in 2020, with 85.8% of adults listening every week during Q1 2020.
- Radio listening through digital platforms (DAB, DTV online) made up 57% of all listening in Q1 2020.
- Just over a quarter of homes in Scotland had a smart speaker (27%) at the beginning of 2020. The most popular reason for using a smart speaker among users in Scotland was listening to live radio (65%).

The impact of Covid-19 on audiences and broadcasters

Introduction

The role of broadcasters has rarely been so important as in the early stages of the Covid-19 pandemic. The public looked to broadcasters – TV and radio – to keep them updated on news about the pandemic, and entertained as the lockdown kicked in. Viewing figures from the end of March onwards underline what a key role all broadcasters played at that time.

The pandemic has had a significant impact on all aspects of the broadcasting sector in Scotland and will continue to affect the industry for many months to come.

Broadcast TV viewing and news consumption

Lockdown prompted a surge in TV viewing

The Government's implementation of lockdown measures in mid-March 2020 resulted in people having more time for indoor leisure activities in the spring and early summer than in any comparable extended period in recent history.

As a result, there were significant increases in both broadcast TV viewing on a TV set and what we refer to as 'unmatched' viewing – time spent watching the TV set that cannot be attributed to broadcast programming by TV measurement agency BARB.¹ People in Scotland spent an average of 5 hours and 46 minutes per day watching something on the TV screen at the height of the lockdown in April 2020, an 85 minute increase on the figure for 2019. Most of this was still to broadcast television (3 hours and 59 minutes, up 18% on 2019) while viewing on the TV set that cannot be matched to broadcast viewing (such as YouTube, SVoD and gaming) was 1 hour and 37 minutes, an increase of 87% on 2019.

Peak TV screen viewing in Scotland:

April 2020 at the height of the lockdown

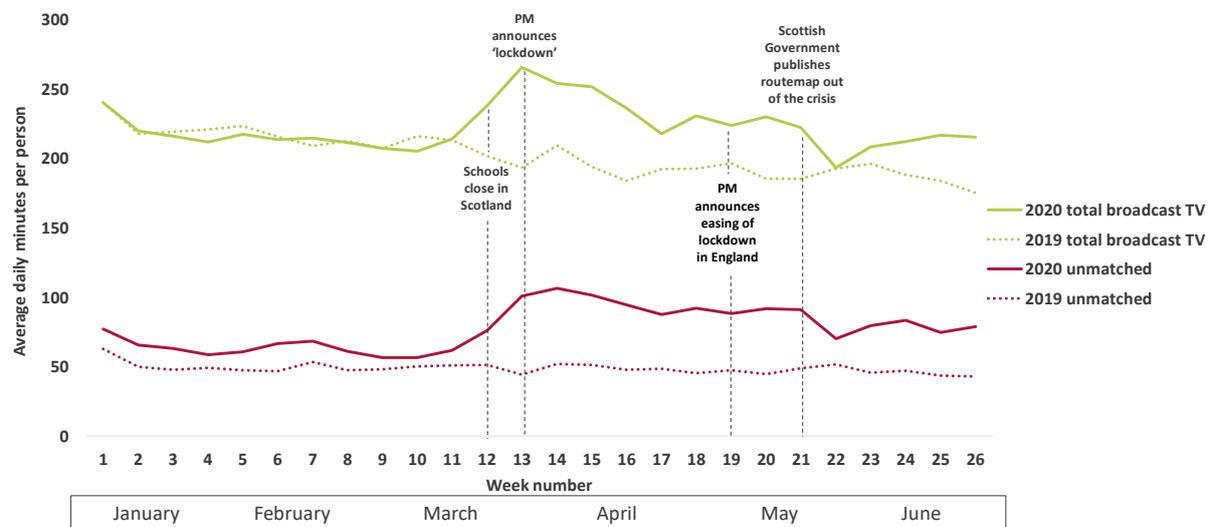


¹ Unmatched viewing = TV set in use but content cannot be audio-matched or otherwise identified. Includes gaming, viewing DVDs/box sets/archives, SVoD, YouTube, time-shifted viewing beyond 28 days, apps on smart TVs and navigation around EPG guides where there is no in-picture broadcast content.

In the week commencing 23 March (week 13), average daily viewing of broadcast television reached 4 hours 26 minutes in Scotland – the highest of all the UK nations and the only one over four hours. This was driven by the Prime Minister’s statement announcing lockdown and the First Minister’s subsequent press conference confirming restrictions in Scotland on the evening of 23 March 2020.

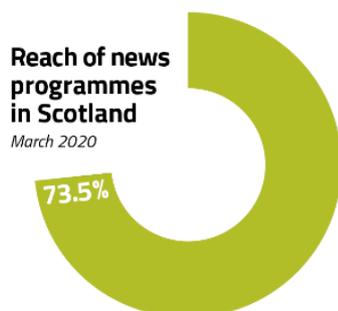
As the lockdown progressed, the combination of reduced viewing of news programming, easing of social restrictions and good weather in parts of Scotland saw broadcast TV viewing decline from its peak – but it remained higher than 2019 levels during the analysis period until the end of June 2020. Unmatched viewing, meanwhile, has not declined in a comparable way, retaining much of the uplift it achieved as a result of lockdown, in large part due to a sustained increase in the viewing of SVoD services such as Netflix and Amazon Prime Video.

Figure 1: Total broadcast TV and unmatched viewing (daily minutes per person) in Scotland



Source: BARB. All individuals (4+). BBC Scotland area

Despite the increase in the amount of time spent watching broadcast TV during the lockdown period, the proportion of people who watched on average, in a week (average weekly reach²) remained below 2019 levels for every month from January to June. During this period the average weekly reach for all measured broadcast TV in Scotland was 84.7%, compared to 87% for the same period in 2019.



This year-on-year decrease in total broadcast TV reach in Scotland came despite an increase in the proportion of people watching news programming each week. The average weekly reach of news on measured broadcast TV channels in 2020 peaked in March (73.5%) and although it decreased each subsequent month (down to 68.7% in June 2020), this was higher than the same months in 2019.³

The increase in news viewing in March helped the PSB channels collectively increase their share of all viewing – up from 57% in February to 59% in March.

² Reach criteria for all broadcast TV: 15+ consecutive minutes.

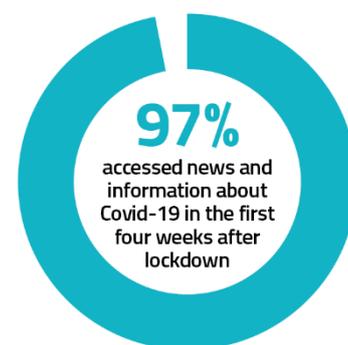
³ Reach criteria for news programming: 3+ consecutive minutes. News programming includes national/international and regional news.

The BBC was the most-used news source for information about Covid-19

The Covid-19 pandemic has been one of the biggest news stories of recent decades, affecting all parts of society in all parts of the world. Unsurprisingly, people's appetite for news surged during this period, with the public eager to keep up with latest developments. Scotland has a diverse media landscape, so Ofcom carried out research during the pandemic to better understand where people were getting their news from.

The findings show that TV and radio services from traditional broadcasters like the BBC and STV were the most-used sources of news for people in Scotland, some way ahead of social media.

In the first four weeks of the lockdown (27 March to 19 April), almost all the online population in Scotland accessed news and information about Covid-19 at least once a day; there was no difference between the individual nations (Scotland 97%, England 97%, Northern Ireland 98% and Wales 98%). Although this figure subsequently decreased, it remained high during the four weeks to mid-May (92%) and the four weeks to mid-June (91%). The frequency has decreased since the height of the crisis, with one in five (21%) in Scotland accessing news and information at least 20 times or more during the first four weeks of lockdown compared to 8% during the four weeks to mid-June.

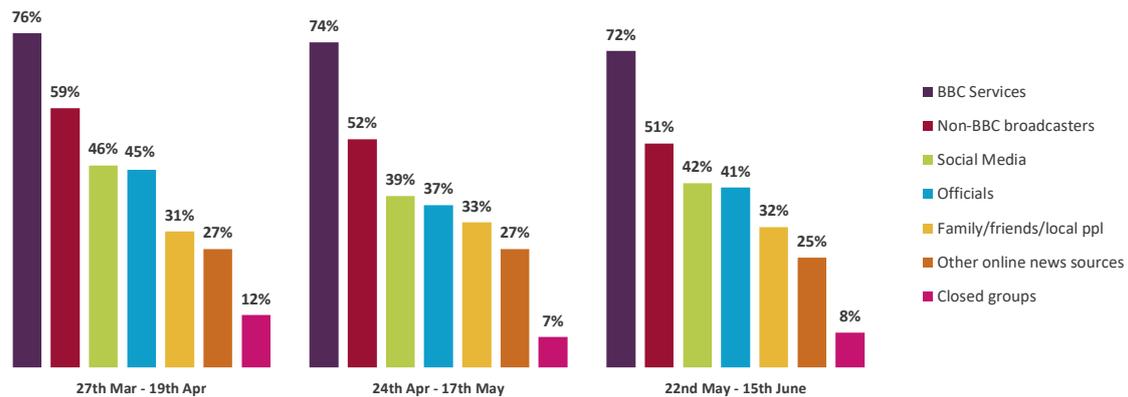


More than seven in ten (76%) online respondents in Scotland used the BBC, either through TV, radio or online, (see Figure 2) during the first four weeks of the lockdown period. This was the most used service, as it was across all the nations (England 79%, Northern Ireland 83% and Wales 78%) for the 12 weeks to mid-June. Six in ten online respondents in Scotland used non-BBC broadcaster services (mainly STV) during the first four weeks of lockdown (59%), decreasing to 51% during the four weeks to mid-June.

The use of non-BBC broadcasters was higher in Northern Ireland (74%) during the first four weeks of the lockdown and remained higher (66%) during the four weeks to mid-June than either Scotland (51%), Wales (53%), or England (46%).

Four in ten online respondents in Scotland had used social media and official sources such as the NHS by mid-June.

Figure 2: Sources used in Scotland for news/information about Covid-19



Source: Ofcom Covid-19 news and information: consumption and attitudes

Q3a. Which, if any of the following sources have you used to get information/news about the Coronavirus outbreak in the last week? Base: All respondents in Scotland who are getting information/news about the Coronavirus outbreak: Month 1 (686), Month 2 (683), Month 3 (717)

How local broadcasters responded to the Covid-19 pandemic

Programming during lockdown

As audiences sought out trusted news sources on the Covid-19 pandemic, as well as entertainment and more light-hearted viewing, broadcasters were faced with the problem of how to continue production during lockdown. With strict social distancing measures in place, broadcasters found themselves having to adapt their services while delivering content to a large and attentive audience.

To meet this challenge, BBC Scotland commissioned new entertainment shows during the lockdown, including *Socially Distant with Susan Calman*, which was filmed entirely from the presenter's garden, while *The People's News: Corona Diaries* gave an insight into life in lockdown for families across Scotland, with participants sharing advice on how to cope with this difficult time.

BBC Scotland was also responsible for broadcasting First Minister Nicola Sturgeon's daily coronavirus updates on television, radio, and online. The benefit of the BBC Scotland channel was felt here, as full coverage of the updates was able to continue uninterrupted on the channel, whereas BBC One had to cut away from the briefings to go to the *BBC News at One*.

With the closing of places of worship in Scotland, BBC Scotland ran *The Service*, a fortnightly religious broadcast covering Muslim, Sikh, Hindu, Church of Scotland, and Catholic services, while *Reflections at the Quay* proved so popular that a petition was launched to extend its run beyond July.⁴

STV responded to the challenges of broadcasting in lockdown by modifying its news broadcasts, producing one news show across the whole of the country to reflect the national story. Despite this, news items were still sourced from across Scotland and proved to be popular with *STV News at Six* regularly attracting audiences of over half a million people across Scotland.⁵

⁴ Change.org, [Petition: This week is the last week of Reflections at The Quay. We want the BBC to reconsider.](#)

⁵ STV, [An update from Chief Exec, Simon Pitts: STV's response to COVID-19](#), 23 June 2020.

BBC ALBA's pandemic programming included the launch of *'Julie Fowlis / Ceòl aig Baile (Music at Home)'*, an eight-part music series filmed during lockdown, featuring acts from Scotland, Ireland, Europe, Canada, Mexico and the US. Each episode was curated by a pair of musicians, with discussion on how musicians are coping during the pandemic. The channel also released a series of short films entitled *'A- Staigh' (At Home)* depicting Gaelic speakers around the world outlining what lockdown meant for them, which were made available on their YouTube channel.

Financial challenges faced by the industry

Although during lockdown broadcasters reached record numbers of viewers, the pandemic has placed a significant financial strain on the industry. This is largely due to a steep fall in advertising revenues as businesses, themselves under huge financial pressures, look for ways to cut costs in a time of deep economic uncertainty.

In order to address the issue of financial sustainability, STV cut its 2019 shareholder dividend and extended its bank facilities; its leadership team took voluntary salary cuts and a share-placing exercise raised £16.2m to further future-proof its operations.⁶

The BBC has not been immune to this financial challenge, with a decline in commercial revenues from BBC Studios and the delayed introduction of the new over-75s' licence fee regime – the BBC now needs to find £125m in cash savings this financial year. The impact of these measures has been felt across the BBC's services, with BBC Scotland introducing a voluntary redundancy scheme as it looks to reduce its headcount by 60 and reduce spending by £6.2m by March 2021.⁷

Community outreach and initiatives

During the pandemic, many broadcasters launched initiatives aimed at helping people and their communities to weather the more difficult parts of lockdown, with a particular focus on education and mental health services.

During the crisis, BBC Scotland focused on tailoring its BBC Bitesize educational content for primary and secondary school students to the Scottish national curriculum. The service provided online lessons across a wide range of school subjects, which were made available on the BBC Scotland website and broadcast daily on the BBC Scotland channel during the pandemic.

In partnership with ITV and mental health charities SAMH (Scottish Association for Mental Health), YoungMinds and Mind, STV launched a new phase in the Get Britain Talking campaign which encouraged people throughout the UK to get in touch with family and friends while in self-isolation or lockdown. People's messages of support could then be shared on social media, with STV broadcasting a selection of messages.

STV's *Local Lifeline* campaign highlighted 105 Scottish businesses and charities, celebrating them for their work during lockdown, when they shared stories of community spirit throughout Scotland. STV devoted £900k worth of airtime to promoting Scottish businesses and charities, along with doubling

⁶ Ibid.

⁷ BBC News, [BBC Scotland announces plans to cut 60 jobs](#), 23 June 2020.

its Growth Fund to £20m⁸, the money from which was given to organisations helping the most vulnerable in Scottish communities.

MG ALBA made additional programmes available in Gaelic through BBC ALBA to enable children's Gaelic learning to continue. A bespoke learning collection was also curated for BBC iPlayer, drawing on archive content, while further resources in Gaelic learning were offered for National 4 and 5 and Higher students.

For the first six weeks of lockdown, the Hits Radio and Greatest Radio Networks in Scotland broadcast *Catch up with Cat*, a daily coronavirus information feature in association with the Scottish government. The show focused on how to stay healthy, both mentally and physically, during lockdown, as well keeping listeners informed about the early stages of the Scottish government's phased strategy for lifting lockdown.

Impact on the production sector

Returning safely to production is a key focus for both broadcasters and the production community as we move through the pandemic. In May 2020, broadcasters and industry bodies, including the BBC and STV, came together to produce industry-wide guidelines on how those working in television filming and production could do so safely while the risk of Covid-19 remained.⁹

In an effort to help safeguard production in the near future, the BBC doubled its Small Indie Fund to £2m during the pandemic.¹⁰ The fund, launched in January 2020, has a particular focus on diverse, out-of-London producers.

Channel 4 looked to support the production sector by committing over £10m to spend on content that captured the impact of the pandemic, as well as keeping viewers entertained and engaged during lockdown. At least half of this spend was dedicated to the nations and regions, or BAME-led production companies. This was combined with a further £3m ringfenced for development funding, again with the commitment that half of the funding would go towards small, nations' and regions' and BAME-led productions.¹¹

Channel 4 and the National Film and Television School (NFTS) came together in June 2020 to deliver a four-week online series of masterclasses and training sessions for indie production companies in the nations and regions.¹² The aim of these sessions was to enhance and develop production companies' and freelancers' skills, ensuring that opportunities for indie productions in the nations and regions didn't dry up.

The role of commercial radio

With the increased consumption of news media during the pandemic, many people turned to both local and national radio for information on the development of the Covid-19 crisis. Despite a shift towards a working-from-home model for most of its reporters, Bauer's stations in Scotland

⁸ STV, [105 organisations celebrated on STV during lockdown](#), 16 June 2020.

⁹ Pact, [Pact and UK Broadcasters introduce new industry-wide guidance for producing TV safely](#), 18 May 2020.

¹⁰ BBC Media Centre, [BBC announces package of measures to maintain creative health of the independent production sector during the COVID-19 pandemic](#), 6 April 2020.

¹¹ Channel 4, [Channel 4 sets out financial plan to navigate the organisation through impact of Covid-19 crisis](#), 8 April 2020.

¹² Channel 4, [Channel 4 and NFTS partner to offer Nations and Regions Indies Online Masterclasses and Training Sessions](#), 15 June 2020.

continued to produce bulletins throughout, with Forth 1 breakfast host Boogie, Tay FM's breakfast host Stuart Webster, and Clyde 1 Superscoreboard's Hugh Keevins all broadcasting shows from home.

Bauer Radio brought all its Hits Radio and Greatest Hits stations in Scotland together to broadcast a Q&A session with First Minister Nicola Sturgeon, where listeners could ask her questions regarding Covid-19 and lockdown. Capital Scotland also broadcast a similar Q&A interview with the First Minister in June on Katy J's drivetime show.

As lockdown began to ease, Pure Radio launched its Scottish Business Support Package which offered radio advertising time to Scottish businesses and charities at a reduced rate, running from June to July 2020.

Community radio

Community radio in Scotland played an important role in supporting communities during lockdown, with many local stations helping to mobilise and promote the support services available in their community, as well as providing reduced or free radio advertising to local businesses affected by lockdown. Examples of how Scottish community radio stations navigated the pandemic included:

- ECFM in Haddington ran interviews to help and advise on mental health, and exercise classes targeted at elderly listeners;
- KCR in Keith worked with local ministers to broadcast a Sunday morning church service;
- Heartland FM in Perthshire provided airtime for the various support services available in Highland Perthshire, as well as offering free airtime for local businesses that might be struggling during lockdown;
- Crystal FM, covering Penicuik and South Midlothian, had volunteers checking on vulnerable adults and ran an appeal that led to 200 carrier bags being made available to a local foodbank; and
- Mearns FM in Aberdeenshire ran government adverts and worked with the local council to direct people to the Grampian Coronavirus Assistance Hub.

TV services and devices

Introduction

While television is still the main device for delivering entertainment services into people's homes, the range of services and the platforms over which they are delivered has grown rapidly in recent years.

Traditional platforms such as Freeview, which is available through digital terrestrial television (DTT), satellite – either from Sky or Freesat – and cable through Virgin Media are still the main providers in Scotland, while IPTV services from telecoms providers such as BT and TalkTalk provide further options for audiences.

These platforms rely on varying types of infrastructure to deliver their services. Freeview uses a network of transmitters across Scotland to deliver television services into people's homes through a rooftop aerial, a method which is widely although not universally available across Scotland. Satellite is nearly universally available,¹³ while cable coverage is mostly available in built-up urban areas.

However, the story of recent years has been the increasing take-up of subscription video-on-demand (SVoD) services from providers such as Netflix and Amazon Prime Video, helped by the spread and improved speed of broadband networks.¹⁴ Although these SVoD services are mainly taken in addition to content on other platforms, they are having a hugely disruptive effect on the sector, gaining new customers and affecting how and where people watch TV-like content.

Traditional public service broadcasters are adapting how they deliver content to viewers. Alongside their linear TV services, the BBC, STV, ITV, Channel 4 and Channel 5 all have their own broadcaster video-on-demand (BVoD) services. These SVoD and BVoD services are delivered over the internet through connected TVs as well as via mobile phones and tablets.

Traditional TV platforms

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

Televisions remain in the vast majority of homes in Scotland with more than nine in ten households in Scotland (93.5%) having a TV set at the beginning of 2020.¹⁵ But the way we are accessing services on our televisions is changing, mainly because of the amount of content that is being delivered and accessed through the internet.

Traditional paid-for television services such as satellite (mainly Sky) and cable services (Virgin Media) were present in just under half of homes (45%) at the beginning of 2020. Paid-for satellite accounts for most of these, with Virgin Media's cable service present in 16% of Scottish households.

¹³ Based on the availability of a line-of-sight path to the satellite

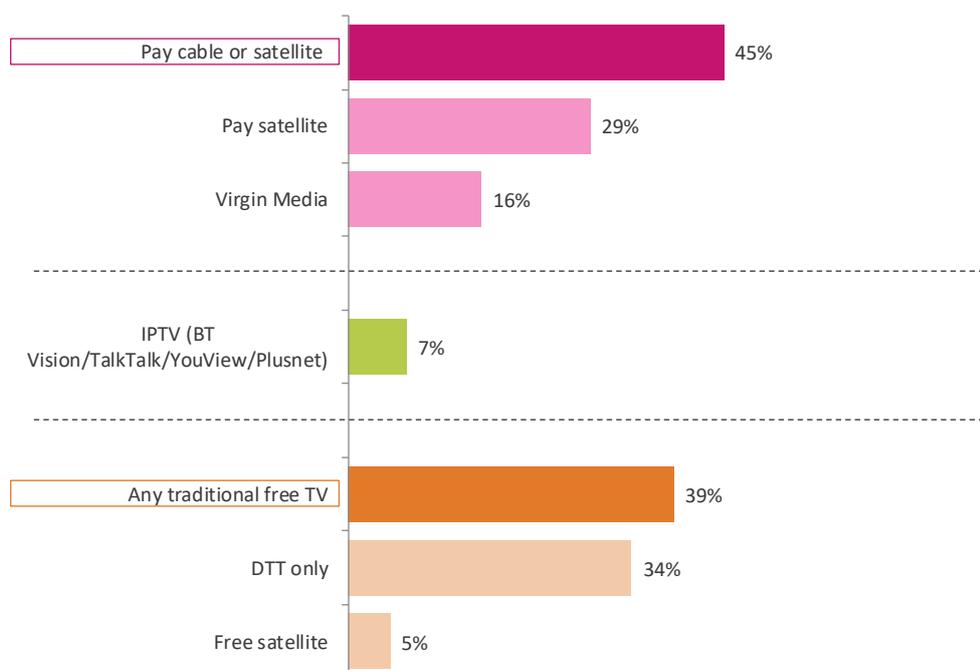
¹⁴ Ofcom, [Connected Nations Update: Spring 2020](#)

¹⁵ BARB Establishment Survey Q1 2020

Free TV services – either through an aerial (DTT) or satellite (Freesat) – were the main TV service in 39% of Scottish homes at the beginning of 2020. Around a third of homes (34%) had a DTT service only.

Only a small proportion of homes in Scotland (7%) had an IPTV-based service. These are delivered through set-top boxes from an internet connection, from providers including TalkTalk and BT, and offer a Freeview service alongside pay-TV channels.

Figure 3: Take-up of TV platforms in Scotland



Source: BARB Establishment Survey Q1 2020

Online TV platforms

A majority of homes in Scotland now have a television connected to the internet

As with other nations of the UK, take-up of subscription video-on-demand (SVoD) services from companies such as Netflix and Amazon Prime Video, delivered over the internet, continues to gather pace among households in Scotland.

Some 73% of households in Scotland had a fixed-line broadband connection at the beginning of 2020 and 59% of homes had a TV connected to the internet through a smart TV or other devices such as streaming sticks (e.g. Amazon Fire, Roku and Google Chromecast).¹⁶

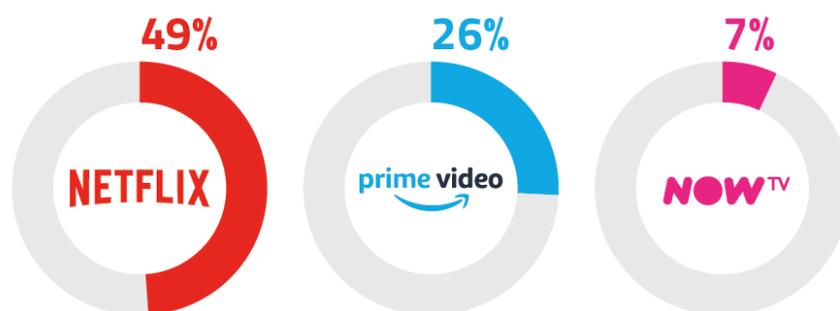


¹⁶ Ofcom Technology Tracker 2020

Nearly half of homes in Scotland use Netflix

At the beginning of 2020, more than half of households (56%) had a subscription to one of the paid-for online services. Netflix was the most popular and was present in nearly half of homes (49%) while Amazon Prime Video was present in around a quarter of homes (26%).¹⁷ A significant amount of viewing of these services is also on devices other than a TV, such as smartphones and tablets.

And competition for viewers from and between these paid-for online players is set to increase with several recent high-profile launches, from Apple (Apple TV+), Disney (Disney+) and BBC/ITV (Britbox) in the past year.



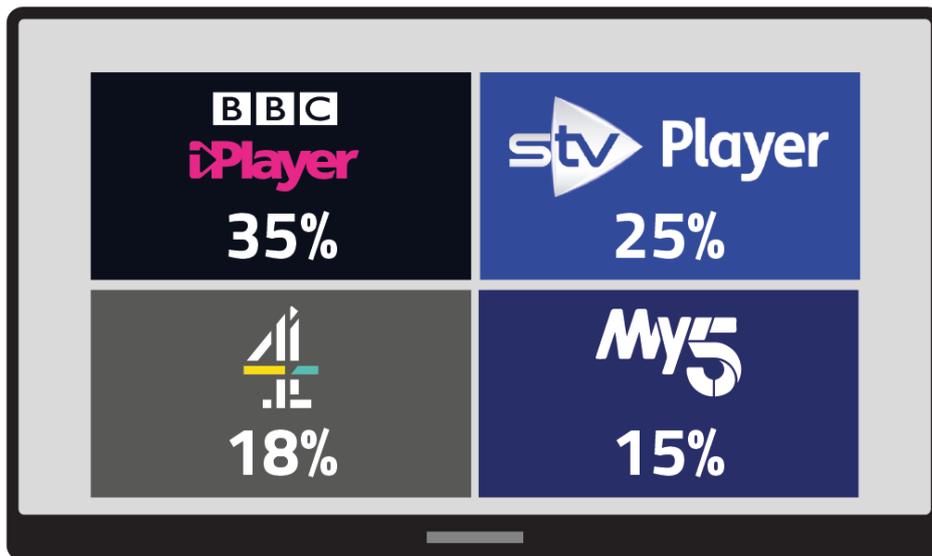
BBC iPlayer is the most popular PSB service among viewers in Scotland

Broadcaster video-on-demand players too are proving popular with viewers, with 36% of Scottish homes using such a service at the beginning of 2020. The most popular, the BBC iPlayer, was watched in over a third of Scottish homes (35%). The STV Player (25%) was the next most popular BVoD player, followed by All4 (18%) and My5 (15%).

These services are continuing to expand their offerings as they move further away from being merely catch-up services and become content destinations in their own right. The BBC is now able to keep programmes on the iPlayer for 12 months after their initial broadcast, while the STV Player includes additional channels like FreeSports and EDGEsport.

¹⁷ BARB Establishment Survey Q1 2020

Figure 4: Use of main broadcaster video-on-demand (BVOD) services in Scotland (% of households)



Source: Ofcom Technology Tracker 2020

STV Player

The STV Player was made available on Sky in 2019, enabling Sky customers in Scotland to view popular content such as *I'm a Celebrity...Get Me Out of Here!* and localised programming such as the *STV News at Six* through their Sky box. This move followed the announcement of a five-year agreement between STV and Sky in early 2019 which led to both of STV's linear services in Scotland being made available in HD.

The STV Player also launched UK-wide on Virgin Media in June 2020, making more of its content available to the whole of the UK, not just its broadcasting regions in Scotland.¹⁸

Two in five homes in Scotland use YouTube

Research carried out for Ofcom's Online Nation 2020 report¹⁹ found that viewers are spending a significant amount of time watching video content online on sites like YouTube. Indeed, a third of adults (32%) across the UK who are online reported spending more time watching live TV (not including recorded playback or BVOD viewing), rising to 57% among 18-24 year olds.²⁰ Over two in five households in Scotland (42%) used YouTube to watch programmes, films or other video content at the beginning of 2020.²¹



¹⁸ STV, [STV Player to launch UK-wide on Virgin Media](#), 11 June 2020.

¹⁹ Ofcom, [Online Nation](#), 2020.

²⁰ [Ofcom video-sharing platforms research 2020 \(adults\)](#)

²¹ Ofcom Technology Tracker 2020

Broadcast TV viewing

Introduction

People in the UK still spend hours watching TV every day, but over the past decade new services and new ways of watching have appeared, driven largely by improved broadband networks²² and new on-demand services delivered over the internet. The ability for viewers to watch what they want when they want through online players from the likes of the BBC, STV, Channel 4 and others has proved especially popular with younger people.

Having TV sets that can be connected to the internet has also paved the way for major global players like Netflix, Amazon Prime Video and others to launch new subscription video-on-demand (SVoD) services in markets right around the world, providing yet more choice for viewers and increased competition for domestic broadcasters.

The consequences of this increasingly fragmented TV landscape can be seen throughout this chapter. Daily viewing of broadcast television in Scotland fell again in 2019 but remains the largest component of TV set viewing at an average of 3 hours 22 minutes a day, while the amount of time spent watching other content such as SVoD services has increased, although it is still modest by comparison.

Significant numbers still tune in for blockbuster television series with the top four most-watched programmes in Scotland last year attracting more than a million viewers. Elsewhere, Ofcom's News Consumption Survey research underlines the importance of public service broadcasting, with BBC One and STV remaining the two most popular news sources for people in Scotland.

Data included in this section are for the calendar year 2019 (pre-Covid) and do not reflect different viewing patterns from that period, outlined earlier in this report.

²² Ofcom, [Connected Nations Update: Spring 2020](#)

Where our data comes from

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 (with more than 500 homes in Scotland) 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.

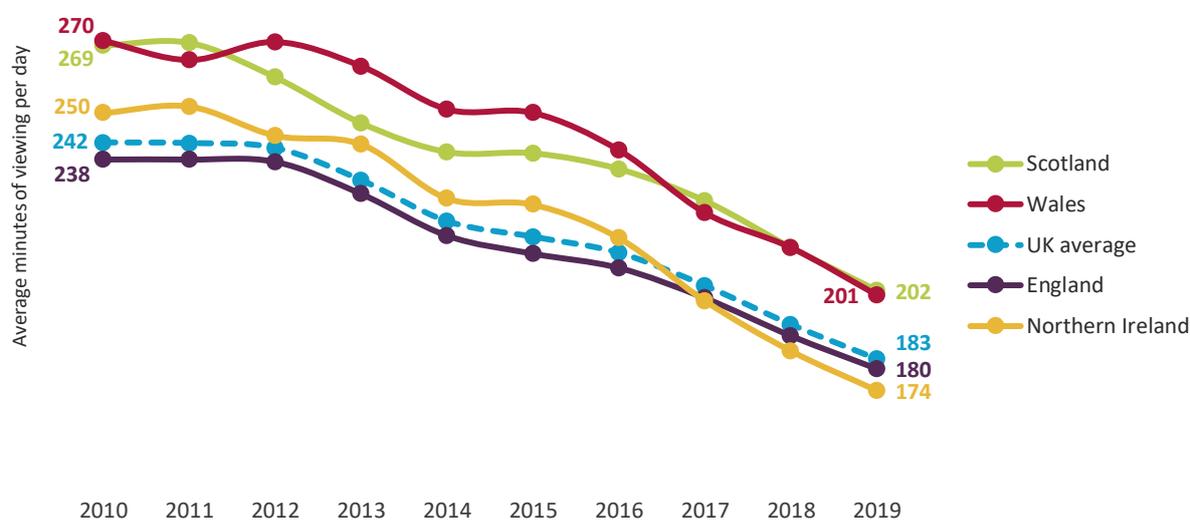
Unless otherwise stated, figures quoted are for seven-day consolidated viewing on a TV set. Consolidated viewing includes viewing of programmes at the time they were broadcast on TV (live viewing) as well as from recordings on digital video recorders (DVRs) and through catch-up player services (e.g.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

People in Scotland watched the most broadcast TV in the UK in 2019

On average, people in Scotland spent 3 hours 22 minutes per day watching broadcast TV on the TV set in 2019, the most of any nation in the UK. This was an 11-minute decline from 3 hours 33 minutes in 2018 and over an hour less than at the start of the decade.

Proportionally, daily viewing in Scotland declined by 5.5% between 2018 and 2019, which was slightly higher than the 4.9% seen across the UK as a whole.

Figure 5: Average daily minutes viewed per person, by nation: 2010-2019

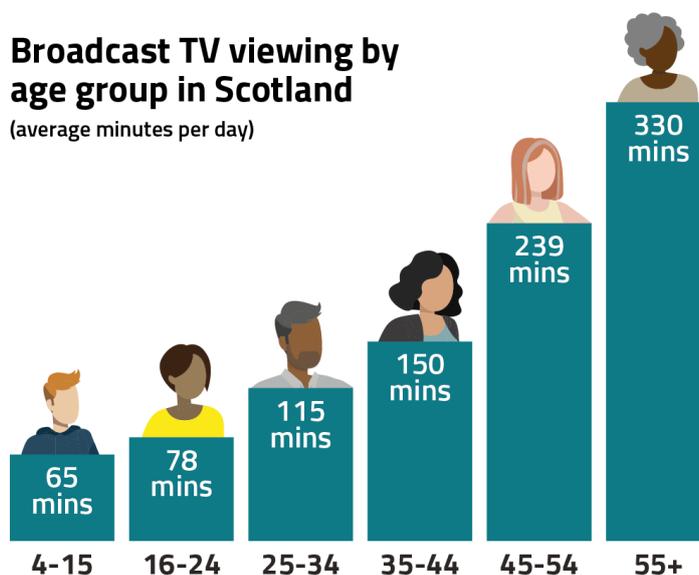


Source: BARB. BBC areas, all individuals (4+).

Older viewers drive broadcast TV viewing in Scotland

Looking at the viewing habits of different age groups in Scotland, older people watch more broadcast TV than younger viewers. In 2019, the over-54s watched an average of 5 hours 30 minutes per person per day in 2019, which dropped to just under four hours for the 45-54 age group.

In contrast, children aged 4-15 watched just over an hour (65 minutes) on average per day, with 16-24s watching only slightly more at 78 minutes per day in 2019. The greatest proportional decline in viewing year-on-year was among 25-34-year-olds, whose average viewing time of 1 hour 55 minutes was 16% less than in 2018.²³



The final episode of *Line of Duty* series five was the most-viewed show in Scotland in 2019

BBC One provided the top three most-viewed shows in Scotland in 2019 with *Line of Duty*, *Gavin & Stacey* and *Strictly Come Dancing*. The final series of *Still Game* premiered on the first night of broadcast for the BBC Scotland channel and was the fourth most-viewed show across the year.

Led by *I'm a Celebrity Get Me Out of Here!*, six of the top 20 were broadcast on STV/ITV in Scotland, while *The Great British Bake-Off* was the only Channel 4 programme to make this list.

Figure 6: Top 20 most-watched programmes in Scotland: 2019

Rank	Programme Title	Channel	Date	Average 000s	Share %
1	Line Of Duty	BBC One	05/05/2019	1,201	51.1
2	Gavin And Stacey	BBC One	25/12/2019	1,111	45.5
3	Strictly Come Dancing	BBC One	14/12/2019	1,042	57.4
4	Still Game	BBC Scotland	24/02/2019	1,033	38.0
5	Only An Excuse?	BBC One	31/12/2019	991	55.5
6	I'm A Celebrity Get Me Out Of Here!	STV/ITV	17/11/2019	979	44.9
7	Britain's Got Talent	STV/ITV	06/04/2019	925	48.2
8	Shetland	BBC One	12/03/2019	919	33.0
9	Hogmanay 2019	BBC One	31/12/2019	838	48.3
10	Coronation Street	STV/ITV	02/01/2019	831	42.7

²³ Source: BARB. BBC Scotland area, all individuals (4+)

11	The Great British Bake Off	Channel 4	29/10/2019	798	36.8
12	Seven Worlds, One Planet	BBC One	27/10/2019	797	39.5
13	Manhunt	STV/ITV	06/01/2019	776	35.3
14	Call the Midwife	BBC One	17/02/2019	775	35.3
15	Emmerdale	STV/ITV	31/01/2019	751	39.3
16	Silent Witness	BBC One	21/01/2019	735	32.7
17	His Dark Materials	BBC One	03/11/2019	726	36.7
18	Selling Scotland	BBC One	31/12/2019	724	40.7
19	The Victim	BBC One	08/04/2019	720	30.8
20	Vera	STV/ITV	20/01/2019	717	31.2

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

As live viewing continued to decline in 2019, time-shifted and unmatched viewing grew

Although people in Scotland watched less broadcast television overall in 2019, they were spending slightly more time watching catch-up and recorded viewing up to seven days after broadcast, with average minutes per person per day increasing slightly by one minute year on year to 32 minutes in 2019.

Viewing of non-broadcast services on the TV set (such as streaming services like Netflix and Amazon Prime Video, or gaming) increased by four minutes a day in 2019, to 52 minutes per person per day.

This increase did not totally offset the overall decline in use of the television set, which decreased by 5 minutes to 261 minutes in 2019 from 266 minutes in 2018.

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



Source: BARB. BBC Scotland area, all individuals (4+). Average minutes of viewing/day.

*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.

***Other broadcaster content = content viewed on measured broadcasters' BVoDs and AVoDs that has not broadcast on linear television channels. For example, BVoD exclusives or historical box sets. Note: this was included within unmatched viewing in previous Ofcom reports.*

What is public service broadcasting?

Public service broadcasting (PSB) is currently provided in Scotland by the BBC, Channel 4 Corporation (C4C), STV, ITV, S4C and Channel 5. While 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 and BBC Scotland 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.

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

In 2019, the main five PSB channels accounted for a combined 51.8% share of the total broadcast TV audience in Scotland – the highest of the UK nations. This was a decline from 53.6% in 2018, although BBC One, STV/ITV and Channel 4 had slightly larger shares of viewing in Scotland than the UK averages.

Figure 8: Percentage share of the total TV viewing in the nations for the five main PSB channels



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

BBC Scotland

The BBC Scotland channel had an average viewing share of 2.1% between April 2019 and March 2020 during its broadcast hours between 7pm and midnight, with a reach²⁴ of 15.5% over the same period. This is within the range predicted by Ofcom when it issued its determination that the service could launch in 2018.²⁵

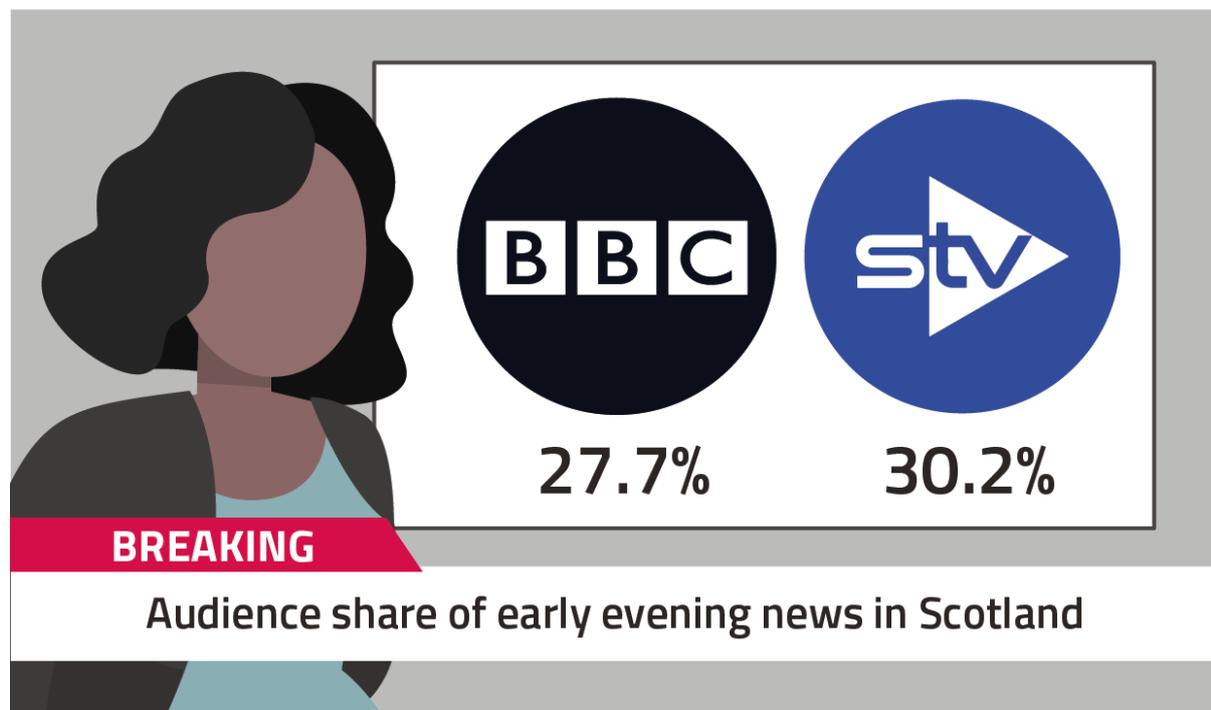
Among the harder-to-reach 16-34 demographic, the channel had an average viewing share of 1.5% over the same period, ranking 11th behind the main five PSB channels and other channels such as Dave and E4.

We will provide more detail on how BBC Scotland has contributed to the delivery of the BBC's mission and public purposes in our third annual report on the BBC, which will be published later in 2020.

STV's news bulletin attracts a greater share in Scotland than the UK Channel 3 average for the same slot

Reporting Scotland, BBC One Scotland's early-evening news bulletin, attracted a 27.7% share of the slot's viewing in Scotland, slightly lower than in 2018 (30.2%). STV's counterpart, *STV News at Six*, attracted a higher audience share at 30.2% (29.6% in 2018). This was also higher than the Channel 3 UK average share (23.6%) for that time slot.

Figure 9: Audience share of BBC One Scotland and STV early evening news: 2019



Source: BARB. All individuals (4+). Note: Early evening ('local') news bulletin figures based on 'regional news' BARB genre programmes, start time 17:55-18:35, 10mins+ duration, weekdays and include the HD and +1 channels where applicable. BBC One's early evening news bulletin, *Reporting Scotland*, is transmitted between

²⁴ Reach criteria: 15+ minutes consecutive

²⁵ Ofcom, [BBC Scotland Competition Assessment](#), 26 June 2018.

18:30-19:00 and based on BBC areas. STV's News at Six is transmitted between 18:00-18:30 and is based on ITV areas.

Small Screen: Big Debate

Ofcom has launched *Small Screen: Big Debate* to seek ideas and prompt discussion on how to make sure the UK has a resilient public service broadcasting system that continues to meet audience needs. To support this, in February 2020 we published [a five-year review of Public Service Broadcasting](#) (from 2014-2018).

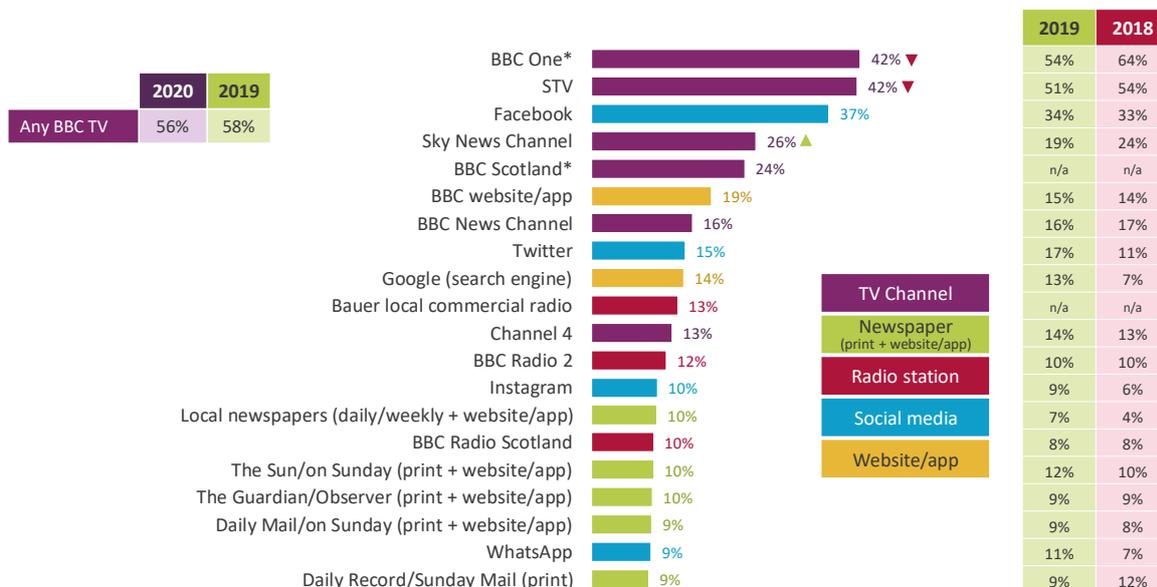
Earlier in 2020, we held events in Aberdeen, Stirling and Stornoway to gather views from industry and audiences about the future of public service broadcasting, and we aim to continue our public engagement on this topic over the coming months. There is further opportunity to feed into this project on the [Small Screen: Big Debate website](#) ahead of a consultation being published later in the year.

Two in five adults in Scotland use BBC One or STV for news

BBC One and STV remain the two most-used news sources for people in Scotland, with 42% of adults using each service in 2020. However, for both services there has been a decrease since 2019 in the proportion of people claiming to use them for news.

There has been a significant increase in the proportion of respondents who claim to use Sky News for news, rising to over a quarter of adults in Scotland (26%) in 2020. We also asked about the local commercial radio services provided by Bauer in Scotland, and found that 13% of adults used a service like Clyde 1 or Northsound 1 for news in 2020.

Figure 10: Top 20 sources of news in general in Scotland: 2020



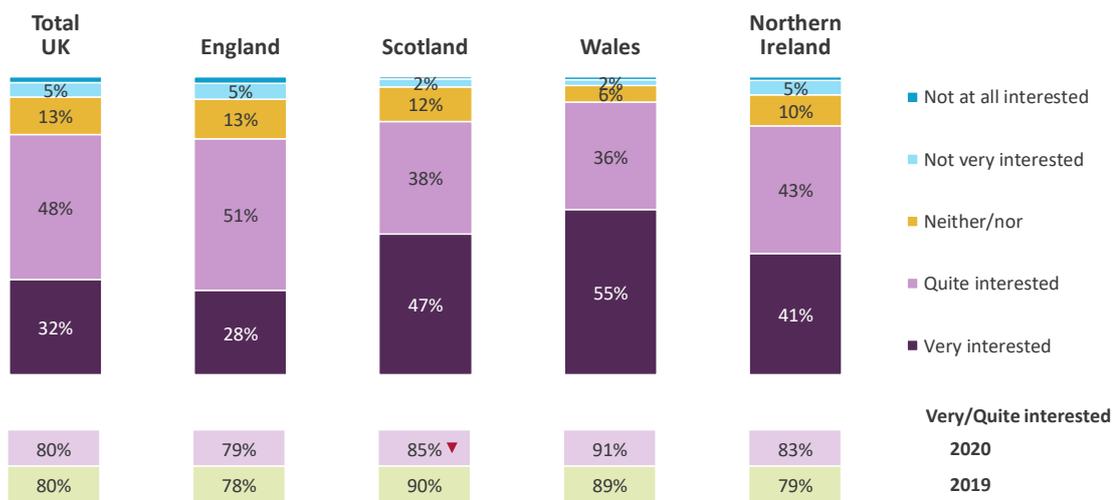
Source: Ofcom News Consumption Survey 2020. Base: All adults 16+ in Scotland – 2020=541, 2019=551, 2018=540. Green/red triangles indicate statistically significant differences between 2020 and 2019. *BBC Scotland new this year. BBC Scotland and BBC One Scotland figures may be affected by respondent confusion about BBC Scotland branding

Nearly half of adults in Scotland say they are ‘very interested’ in news about their nation

There is a significant amount of interest in news about Scotland by people who live there. Nearly half of the adults who follow news claim to be ‘very interested’ in news about Scotland (47%) and that figure rises to 85% when counting people who are ‘very’ or ‘quite’ interested.

As shown in Figure 11, the responses of people claiming to be ‘very interested’ in news about their nation is greater in Scotland, Wales and Northern Ireland than it is in England.

Figure 11: Level of interest in news about own nation, by nation



Source: Ofcom News Consumption Survey 2020. Base: All adults 16+ who follow news 2020/2019 – Total=4379/4524, England=3082/3150, Scotland=526/544, Wales=420/435, Northern Ireland=351/395
Green/red triangles indicate statistically significant differences between 2020 and 2019.

Over a third (34%) of people in Scotland use STV for news about their own nation

For news about their own nation, television is popular with people in Scotland. Over a third of people (34%) use STV, with just under a quarter (24%) claiming to use BBC One. However, both have declined since 2019.

With the introduction of the BBC Scotland channel this year, there may have been some confusion among respondents about the branding of the channel.²⁶ The proportion of respondents who used either BBC One or BBC Scotland for news about Scotland in 2020 was 39%.

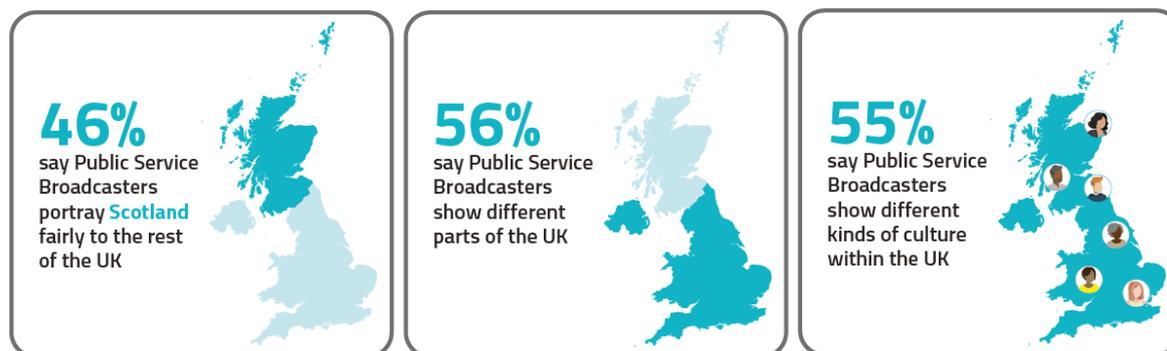
²⁶ We will look to make the distinction between BBC One and the BBC Scotland channel clearer in future research.

Figure 12: Sources used to access news about own nation: 2020

England	%	Scotland	%	Wales	%	Northern Ireland	%
BBC One	38%	STV	34% ↓	BBC One	51%	UTV	47%
ITV	24%	BBC One*	24% ↓	ITV WALES	33%	BBC One	46%
Facebook	15%	BBC Scotland*	18%	Facebook	19%	Facebook	21%
BBC website/app	7%	Facebook	17%	BBC Radio Wales/Cymru	8% ↑	BBC Radio Ulster/Foyle	16%
Twitter	4%	BBC website/app	10%	Local daily newspaper	6%	Cool FM	15%
BBC local/regional radio station	4%	Bauer local commercial radio	9%	BBC website/app	5%	BBC website/app	8% ↑
Google (search engine)	4%	Twitter	6%	South Wales Echo	5% ↓	RTE Channels/Virgin Media One	7%
Sky News Channel	4%	The Daily Record	5%	The Western Mail	4%	Twitter	7%
		Google (search engine)	5%	Wales based news site/app	4%	The Belfast Telegraph	6%
		BBC Radio Scotland	4%			Google (search engine)	5%
		BBC One / BBC Scotland NET	39%			Any NI based news site/app	5% ↑
						Local commercial radio station	4%
Don't follow Nation news	5% ↓	Don't follow Nation news	1% ↓	Don't follow Nation news	3% ↓	Don't follow Nation news	2%

Source: Ofcom News Consumption Survey 2020. Base: All adults 16+ using TV/Newspapers/Radio/Internet/Magazine for news – England=3032, Scotland=521, Wales=415, Northern Ireland=346. Only sources with an incidence of 4%+ in each Nation are shown. ↑ and ↓ indicate statistically significant differences between 2020 and 2019. *BBC Scotland new this year. BBC Scotland and BBC One Scotland figures may be affected by respondents' confusion about BBC Scotland branding.

How viewers in Scotland rate the public service broadcasters



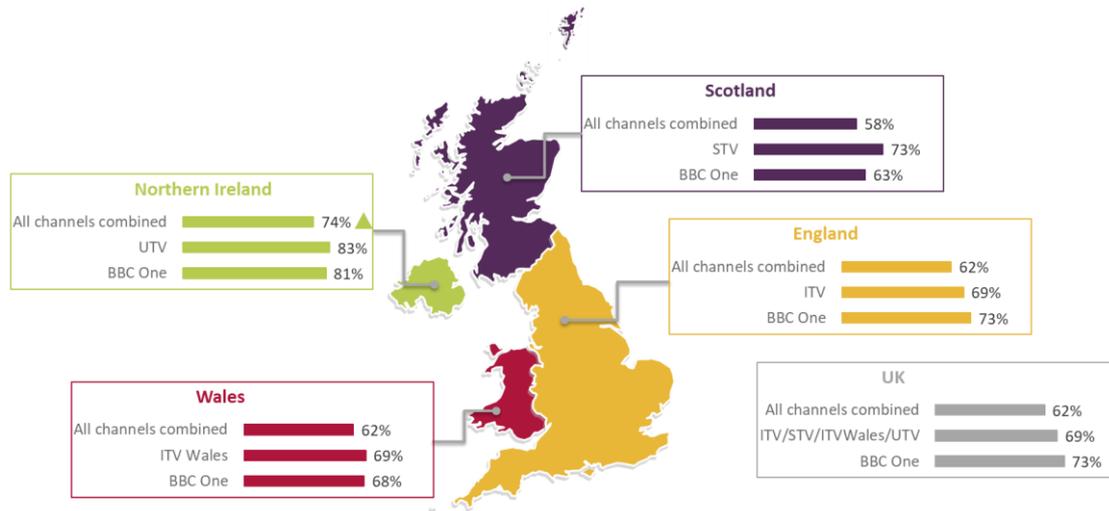
Source: Ofcom PSB Tracker 2019

In Scotland, just under seven in ten (68%) PSB viewers say they are satisfied with PSB provision. This compares to 73% in England, 75% in Wales and 76% in Northern Ireland.²⁷

²⁷ Ofcom PSB Tracker 2019

And viewers in Scotland also have the lowest rating for news provision specifically provided for Scotland, with less than three in five (58%) rating it as 7-10 on the 10-point scale. However, STV has a higher rating at 73%, compared to BBC One at 63%.²⁸

Figure 13: Provision of high-quality news within nation, by provider (7-10 rating)



% Rating for delivery 10/9/8/7

Source: Ofcom PSB Tracker 2019. Q16- Extent to which the channel is rated as 7-10 out of 10 in relation to the following statement: *Its regional news programmes provide a wide range of good quality news about my area*
 Base for individual channels: Self-reported viewers of each in each nation (BBC One = UK: 2062; Eng: 1443; Scot: 208; Wales: 214; Northern Ireland: 197), (ITV1 = UK: 1774; Eng: 1224; Scot: 173; Wales: 188; Northern Ireland: 189). Base for 'All channels combined': All respondents who ever watch any PSB channels in each nation (UK: 2993; Eng: 2103; Scot: 303; Wales: 294; Northern Ireland: 293)

²⁸ Ofcom PSB Tracker 2019

TV programming for and from Scotland

Introduction

In addition to the PSB provision available UK-wide, the BBC, STV and ITV provide programming specifically for viewers in Scotland across a range of genres, but most notably news and current affairs output.

Spend on programming for viewers in Scotland rose significantly, by £26.3m to £80.6m in 2019, largely due to the launch of the new BBC Scotland channel in February 2019. There was a 45% real-terms increase in spending on news programming, while spending on genres other than news and current affairs increased by 61%.

The combined STV and ITV spend on first-run content fell below £10m for the first time since 2013 last year, with STV continuing to account for the majority of Channel 3 spend on programmes specifically for viewers in Scotland.

As with spend, the launch of BBC Scotland led to a large increase in the number of hours produced by the BBC for viewers in Scotland, rising by 81% to 1,342 hours in 2019.

Since 2019, the BBC's output has been predominantly through BBC One Scotland and BBC Scotland, although additional output is available online and through *The Social*. STV has also begun commissioning content to premiere on the STV Player, such as *Vote 99 – Birth of a New Scotland*.

Scotland is also an important source of production for PSB content shown across the UK. Some 8% of qualifying network spend on the PSB channels was on Scotland-based productions in 2019, similar to 2018. This chapter focuses on content shown on the linear PSB services available in Scotland, with analysis of the latest trends across the UK available in [Media Nations 2020](#).

Spend on programming for Scotland

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 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. All spend figures are in real terms, which mean they are adjusted for inflation using the consumer price index (CPI) and are listed in 2019 terms.

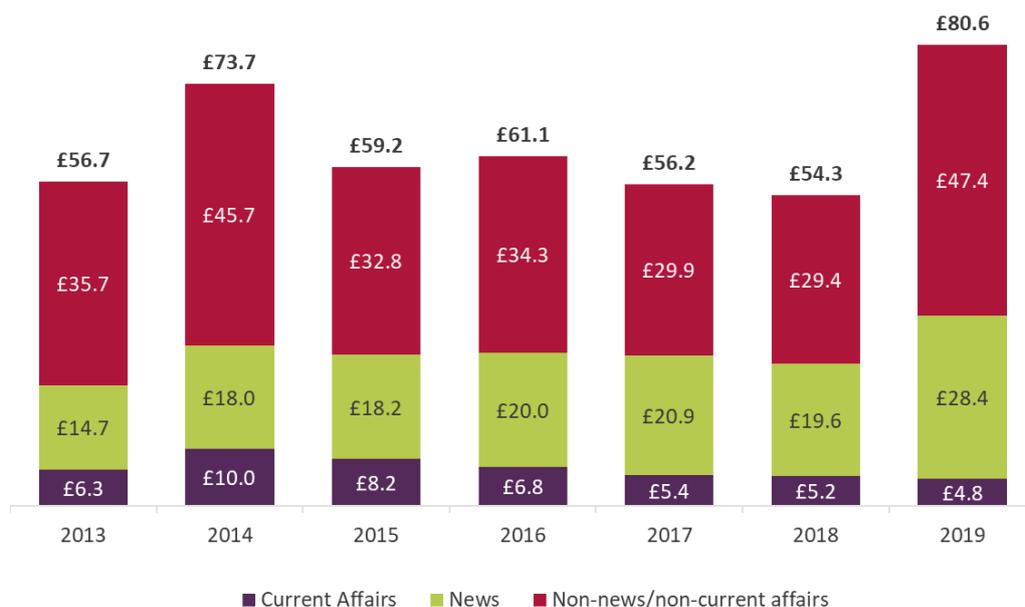
With the launch of BBC Scotland, spend increased by 48% in real terms to £80.6m in 2019

Following two years of decline, spend on programming for viewers in Scotland reached £80.6m in 2019, an increase of £26.3m in real terms on the previous year. Such an increase can be put down to the launch of BBC Scotland in February 2019 and the range of new programming broadcast on the channel.

In 2019, the majority of PSB first-run investment in Scotland went toward non-news/non-current affairs programming, increasing by 61% in real terms year on year to £47.4m. A wide range of first-run programmes were broadcast on BBC Scotland throughout the year, such as *Scotland's Home of the Year* and *Inside Central Station*.

Spend on news programming also rose substantially year on year, up 45% in real terms to £28.4m. Again, this was driven by the launch of BBC Scotland and its nightly news programme *The Nine*. PSB first-run spend on current affairs content was the only genre to decline in 2019, down by 7.7% in real terms to £4.8m, mainly due to there being fewer episodes of *Disclosure* broadcast on the BBC in 2019.

Figure 14: PSB spend on first-run UK-originated content for Scotland, by genre (£m)



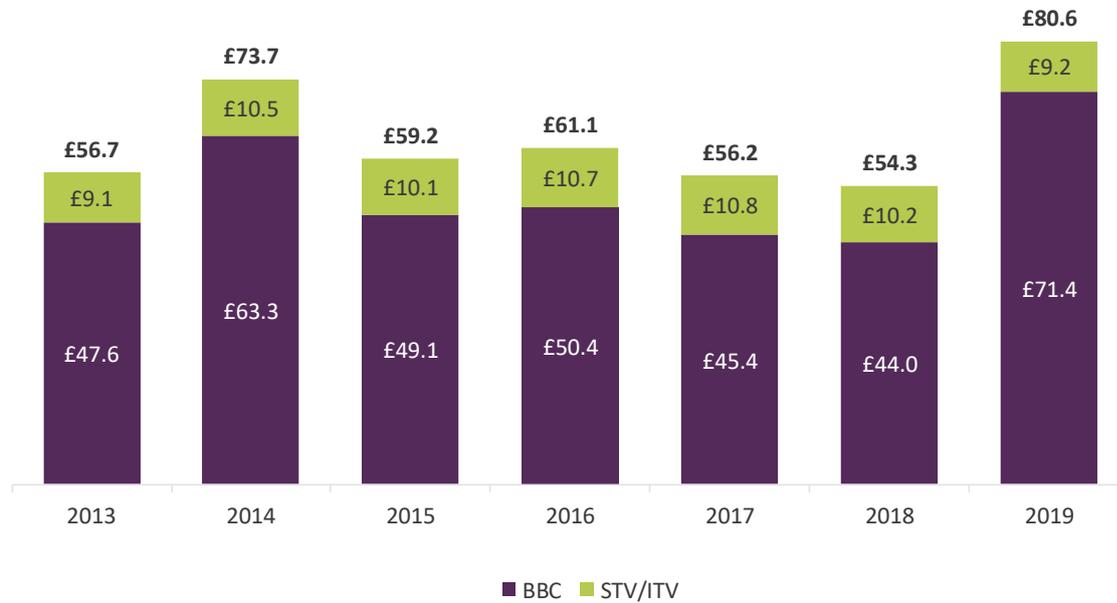
Source: Ofcom/broadcasters. Note: Figures are expressed in 2019 prices. Note: excludes BBC ALBA.

The BBC's spend increased by £27.4m in 2019

The chart below shows the full impact of the BBC's increased spend in Scotland across 2019. Across BBC One Scotland, BBC Two Scotland (before it closed in February 2019) and BBC Scotland, spend increased by 62% in real terms in 2019. This figure includes the BBC Scotland contribution to co-commissions such as *Guilt* and *Still Game* which premiered on the channel before being shown across the UK on other BBC services.

In 2019 the combined STV and ITV spend on first-run content fell below £10m for the first time since 2013, with STV continuing to account for the majority of Channel 3 spend on programmes specifically for viewers in Scotland. STV is currently going through a 3-year creative and digital growth plan that launched in 2018.²⁹

Figure 15: BBC and STV/ITV spend on non-network first-run UK-originated content for Scotland (£m)



Source: Ofcom/broadcasters. Note: Figures are expressed in 2019 prices. Note: excludes BBC ALBA.

Spend on original content for BBC ALBA rose for the third consecutive year

BBC ALBA, the Gaelic-language channel run in partnership between MG ALBA and the BBC, spent £17.3m on first-run programming in 2019, an increase of approximately £300,000 in real terms compared to 2018. It broadcast 670 hours of first-run content in 2019, a small increase on 2018 (650 hours), including coverage of Scotland at the *Women's World Cup* in France over the summer.

²⁹ STV, [STV sets out strategy for creative and digital growth](#), 16 May 2018

Figure 16: BBC ALBA spend on first-run UK-originated content (£m)



Source: Ofcom/broadcasters. Note: figures are expressed in 2019 prices.

Hours of programming produced for viewers in Scotland

Local programming requirements / commitments

The BBC, STV and ITV are required to produce programming for viewers in Scotland. This is done through quotas for news and non-news/current affairs programmes.

STV has two services that serve most of Scotland: STV Central and STV North. Under the terms of their licences, which were both renewed on 1 January 2015 for ten years, STV is required to provide at least 5 hours 30 minutes of programming per week, including four hours of news and 33 minutes of current affairs. Both STV services have two sub-regions (Aberdeen and Dundee for STV North, and Edinburgh and Glasgow for STV Central), which have at least 25 minutes of bespoke news programming per week.

ITV Border serves the south of Scotland and Cumbria, splitting its output to provide programming focusing on issues relevant in the south of Scotland. In 2014, the licence was amended to require ITV Border to provide 3 hours 5 minutes of news per week and an additional 90 minutes of non-news programming specifically for the south of Scotland.

The BBC, through its operating licence which came into effect on 1 January 2018, must also fulfil regulatory conditions specific to Scotland. Among other things, this operating licence stipulates that in each financial year the BBC must ensure that in respect of BBC One Scotland and BBC Scotland taken together:

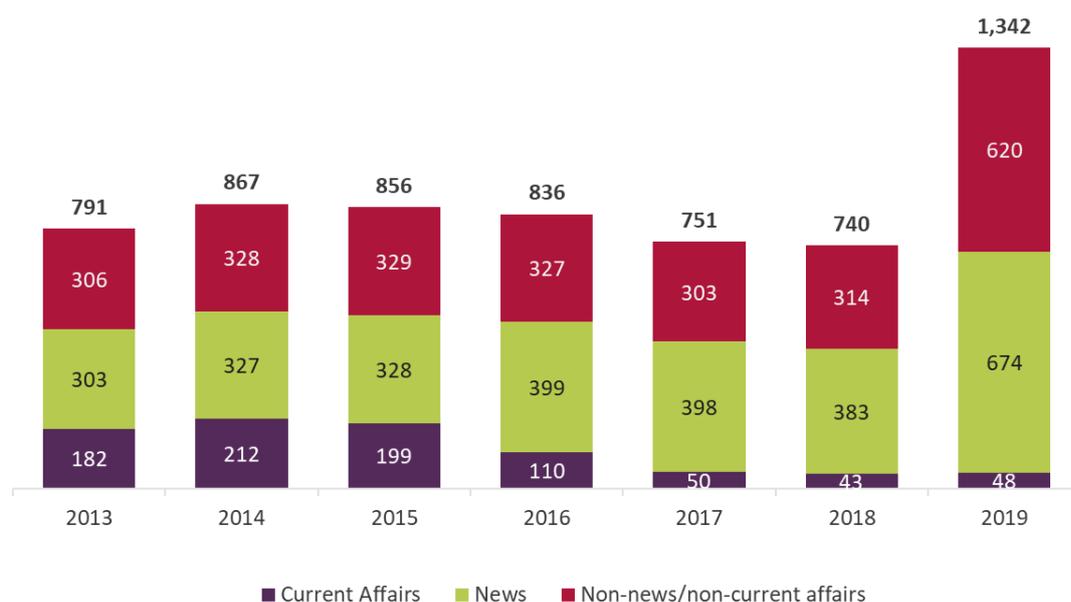
- the BBC must provide a range of genres in its programming that reflect Scotland’s culture;
- in respect of BBC One Scotland, at least 290 hours must be allocated to news and current affairs programmes; and at least 155 hours to non-news programmes;
- in respect of the BBC Scotland channel, there must be at least 212 hours of news shown in peak viewing time in 2019 (and 250 hours after 2019);
- at least 90% of first-run UK originations must be made in Scotland; and
- the BBC must ensure a suitable range of programmes, including news programmes which contain news from across Scotland or reflecting a Scottish perspective.

First-run hours from the BBC increased by 81% in 2019

As with spend, the launch of BBC Scotland led to a large increase in the number of hours produced by the BBC for viewers in Scotland, rising by 81% to 1,342 hours in 2019.

The hours of non-news/non-current affairs output nearly doubled year on year to 620 hours, driven by further Scottish football coverage and new commissions like *A View from the Terrace*. News provision also increased by 76%, with BBC Scotland’s *The Nine* complementing BBC One Scotland’s *Reporting Scotland*.

Figure 17: BBC hours of first-run UK-originated content for Scotland, by genre



Source: Ofcom/broadcasters. Note: excludes BBC ALBA.

The number of hours produced by STV for viewers in Scotland declined by 41% in 2019

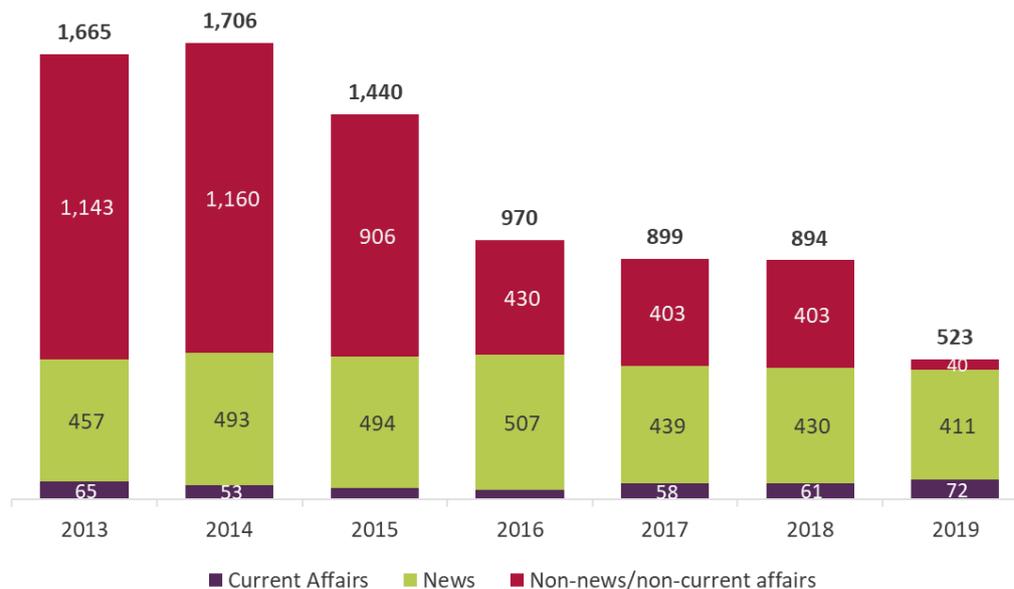
STV produced 523 hours of first-run UK-originated content for viewers in Scotland in 2019, a reduction of 41% compared to 2018.

The decline in first-run content is primarily in the non-news/non-current affairs genre with only 40 hours of first-run content broadcast in 2019, compared to 403 hours in 2018 (a decrease of 90%).

This was driven by a reduction in external productions, with all of these hours now coming in-house from STV Productions, such as *Sean's Scotland*.

Hours of first-run news has remained relatively stable at 411 hours, a decrease of 19 hours from 2018. Despite the overall decrease in output, hours of first-run current affairs programming increased by 11 hours to 72 hours, in the year that *Scotland Tonight* was placed in the peak-time schedule.³⁰

Figure 18: STV hours of first-run UK-originated content for Scotland, by genre



Source: Ofcom/broadcasters.

Network content produced in Scotland

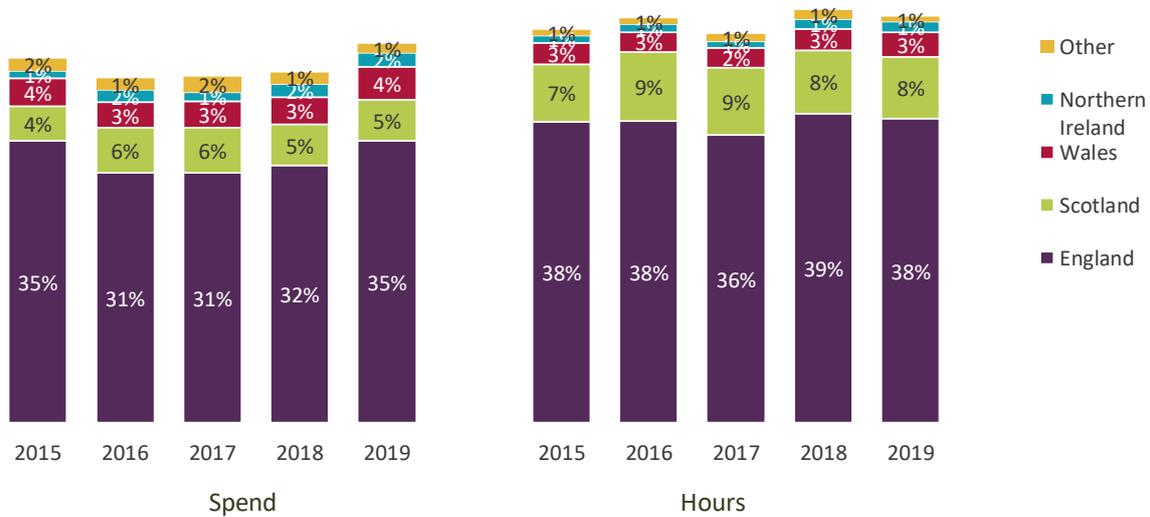
The out-of-London proportion of PSB network spend increased to 47% in 2019

Public service broadcasters have to make programmes that are broadcast for the first time on their network TV channels in a range of places around the UK that are not London. 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 also has an out-of-England quota. ITV and Channel 5 saw are not specifically required to make content outside England.

The overall proportion of hours and spend of network programming made in Scotland for all of the PSBs was the same in 2019 as in 2018.

³⁰ STV, [STV to place current affairs show, Scotland Tonight, in peak](#), 30 October 2019

Figure 19: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2015-2019



Source: Ofcom/Broadcasters

There was an increase in the proportion of Scottish productions broadcast on Channel 4 and Channel 5 in 2019

While continuing to be the PSB with the most network hours and spend produced in Scotland, there was a decline in both these figures from the BBC in 2019, to 15.1% and 9.1% respectively. The BBC’s productions in Scotland span a wide -range of programmes, including in 2019 new entertainment format *The Hit List*, the BAFTA-nominated mini-series *The Victim* and long-running series like *Eggheads*.

Both Channel 5 and Channel 4 increased their proportion of spend and hours produced in Scotland in 2019, with Channel 5 seeing their proportion of spend in Scotland more than treble to 2.4%, as programmes including shows like *Secret Scotland* were being broadcast across the UK. Channel 4’s figures were boosted by the launch of *Year of the Rabbit*, which is set to return for a second series.

Channel 4 in Glasgow

In October 2019, Channel 4 officially opened its new creative hub in Scotland, located in Glasgow’s Merchant City. Glasgow was selected as the location due to its ‘well established and vibrant independent production sector’ and it is hoped that this move will enable Channel 4 to develop stronger links with the creative sector across the whole of Scotland, as well as the North of England and Northern Ireland.

Figure 20: Proportion of qualifying network production in Scotland, by PSB: 2015-2019

		2015	2016	2017	2018	2019
BBC	Spend (%)	7.7	10.3	9.1	10.4	9.1
	Hours (%)	13.2	16.6	16.3	16.7	15.1
ITV	Spend (%)	0.04	0.02	0.9	0	0.4
	Hours (%)	0.1	0.03	0.2	0	0.2
Channel 4	Spend (%)	5.0	5.2	6.8	3.3	4.5
	Hours (%)	6.3	6.3	8.7	4.8	6.1
Channel 5	Spend (%)	0.6	0.2	0.5	0.7	2.4
	Hours (%)	0.4	0.1	0.6	0.3	1.1

Source: Ofcom/Broadcasters. Note: figures do not include network news production.

Screen Scotland

In March 2020, Screen Scotland announced that First Stage Studios Ltd had been appointed to run a large-scale film and TV studio space in Edinburgh.³¹ It is hoped that the new space will lead to further high-end film and TV production coming to Scotland in the future.

Screen Scotland is also partnering with BBC Scotland and BBC Three, offering the chance for a Scotland-based indie production company to win a four-part series commission that reflects the life experiences of 16-24-year-olds. The series will be broadcast on both BBC Scotland and the BBC iPlayer.³²

³¹ Screen Scotland, [Green light for Scottish film and TV studio](#), 10 March 2020.

³² BBC Media Centre, [BBC Three partners with BBC Scotland and Screen Scotland for a new collaboration](#), 25 June 2020.

Radio and audio

Introduction

Radio continues to be popular with people in Scotland with more than eight in ten adults listening to it every week. And alongside TV screen viewing and online activities, radio continues to account for a considerable amount of time spent on entertainment services, with listeners tuning in for an average of 18 hours every week.

As in previous years, the popularity of commercial radio continues to be a feature of the radio market in Scotland.

Local commercial stations, such as Clyde 1, Capital Scotland and Original 106, accounted for 34% of listening in Scotland; more than half of all listening was to commercial stations, when UK-wide services are included.

Digital listening continues to grow, rising 1.6pp year on year to 57% (Q1, 2020), behind only England of the UK's nations.

The listening figures presented here are for January to March 2020 (Q1 2020). Given the challenges in recruiting panellists for the RAJAR survey data as a result of the pandemic, fieldwork has been suspended and RAJAR has announced that a new measurement system will be developed for the remainder of 2020.³³

Radio listening in Scotland

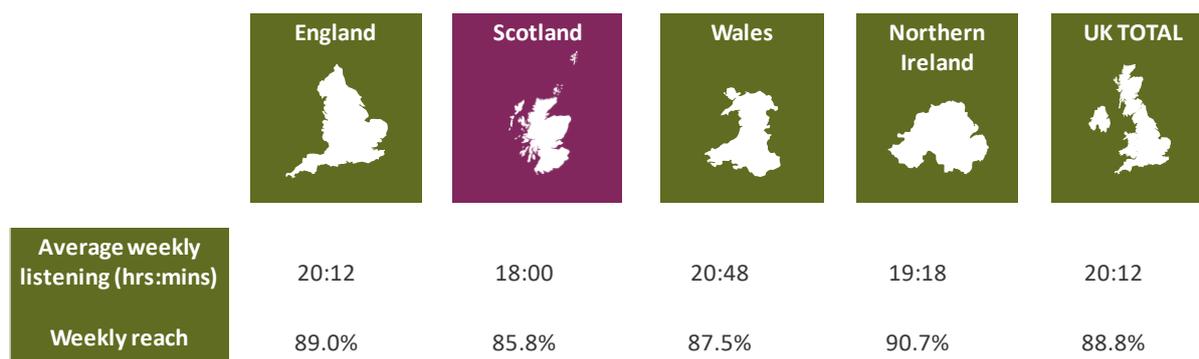
On average, radio reached more than eight in ten adults in Scotland every week in Q1 2020

The weekly reach of radio remained strong in 2020, with 85.8% of adults listening every week during Q1 2020. This was slightly lower than the UK average (88.8%), with Northern Ireland having the highest reach of the UK nations at 90.7%.

Radio listeners in Scotland listened to an average of 18 hours of radio each week over the same period, just over two hours less on average from the UK overall.

³³ RAJAR, [RAJAR Announces Changes Due To COVID-19](#), 20 July 2020

Figure 21: Average weekly reach and listening hours



Source: RAJAR, All adults (15+), Q1 2020

England = BBC Local radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA

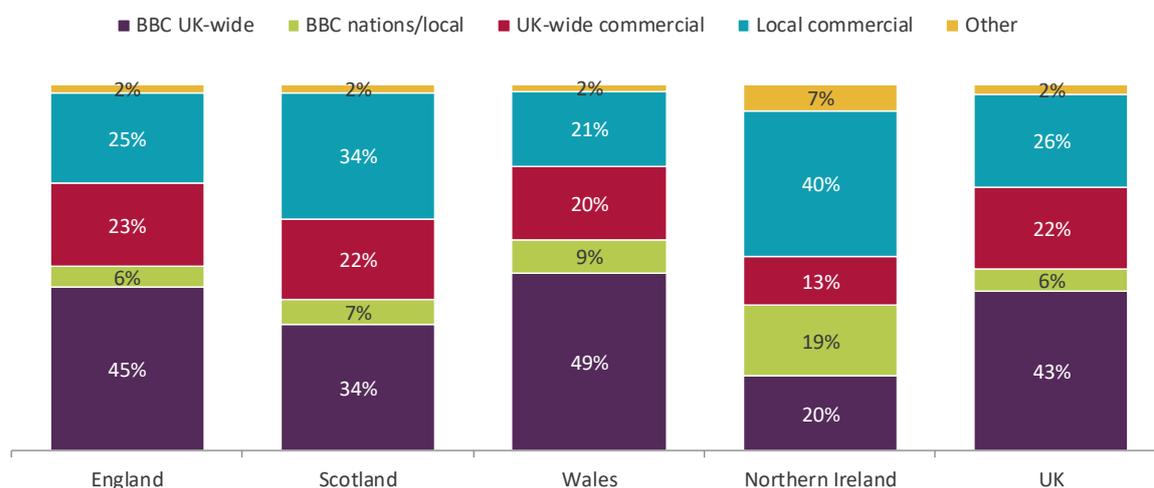
Reach is defined as a percentage of the area's adult population who listen to a station for at least 5 minutes in the course of an average week.

The majority of radio listening was to commercial radio in Q1 2020

Commercial radio – whether local stations targeted at specific parts of Scotland or those available across the UK – made up 57% of all radio listening in Q1 2020. This compares to 48% across the UK as a whole.

Local commercial stations were the most popular commercial stations in Q1 2020, making up over a third of total radio listening over that period. BBC services accounted for 41% of total listening; over a third of total listening was to UK-wide services like BBC Radio 2 and BBC Radio 5 Live.

Figure 22: Share of listening hours, by nation



Source: RAJAR, all adults (15+), Q1 2020

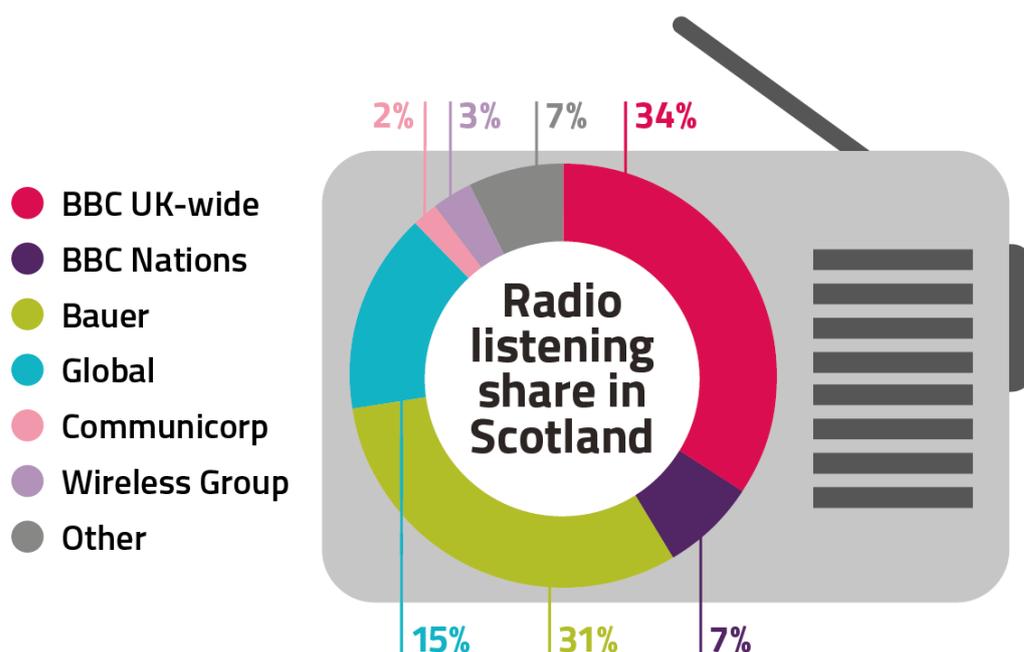
England = BBC Local Radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA

Radio stations from Bauer are the most popular commercial services in Scotland

Looking at individual radio groups, Bauer Radio, the owner of Clyde 1, Forth 1 and Northsound 1, had the largest proportion of the market among commercial radio providers, providing 31% of total radio listening in Q1 2020.

The next largest commercial radio provider, by share of listening, was Global Radio, the owner of Heart and Smooth, with a share of 15% in Q1 2020.

Figure 23: Share of listening in Scotland, by radio group



Source: RAJAR, All adults (15+), Q1 2020, BBC Radio Scotland TSA

DC Thomson launches Pure Radio

In November 2019, DC Thomson launched Pure Radio on DAB across Central Scotland. Based in Glasgow, the station aims to play 'Scotland's best music' and provides local travel information. It does not have a regular news bulletin, opting to let presenters update listeners on developments as they see fit.

In July 2020, Pure Radio expanded its coverage in Scotland by launching on FM in Dundee and Perth, replacing Wave FM.

BBC Radio 2 was the most popular radio station in Scotland in Q1 2020

Across Scotland as a whole, BBC Radio 2 was the most listened-to station across Scotland in Q1 2020 with a reach of 24%. This was followed by BBC Radio Scotland at 18%.

When looking at local areas in Scotland, local commercial stations perform particularly well. Across Scotland's central belt, Clyde 1 had broadly the same reach as BBC Radio 2 in Q1 2020 (19.2% vs.

19.4%) while in Aberdeenshire, Northsound 1 was the most popular station during the same period with a reach of 38%.

Figure 24: Top three radio stations, by region

	UK		Scotland*		Central belt**		Aberdeenshire***	
Rank	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)
1	BBC Radio 2	26%	BBC Radio 2	24%	BBC Radio 2	19.4%	Northsound 1	38%
2	BBC Radio 4	20%	BBC Radio Scotland	18%	Clyde`1	19.2%	BBC Radio 2	29%
3	BBC Radio 1	16%	BBC Radio 1	13%	BBC Radio Scotland	17%	Original 106	23%

Source: RAJAR, All adults 15+, Q1 2020

* BBC Radio Scotland TSA

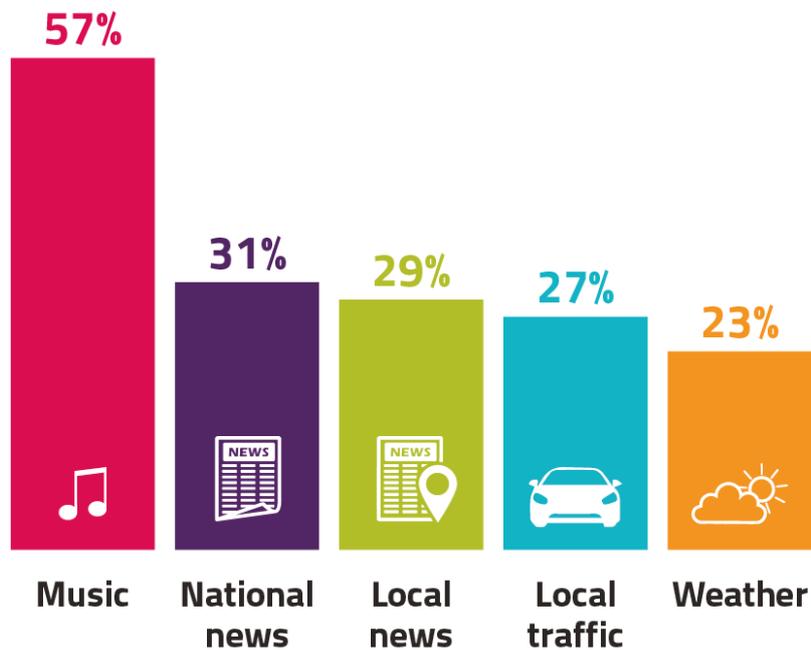
** Capital Scotland TSA

***Northsound 1 TSA

Radio listeners state music as the main reason they tune in to the radio

Music is the most valued type of content for radio listeners across Scotland, followed by national (31%) and local news (29%) content. Further types of local information such as local traffic (27%) and weather (23%) are also valued.

Figure 25: Most valued types of content on the radio



Source: TouchPoints 2019
Base: Weekly radio listeners aged 15+
Ranked by adults in Scotland

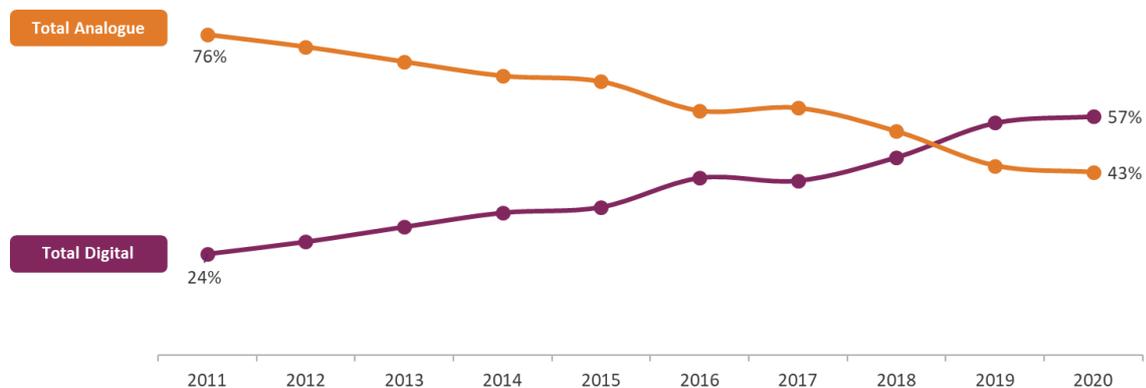
Digital listening in Scotland

Radio listening through digital platforms made up 57% of all listening in Q1 2020

For the second consecutive year, digital listening – whether through DAB radio, digital television or online (including through smart speakers) – made up a majority of all listening in Scotland. This figure rose to 57% in Q1 2020.

Although declining, the share of listening to analogue platforms such as FM or AM stations remained significant in Q1 2020 at 43%.

Figure 26: Share of listening hours via digital and analogue platforms in Scotland: 2011-2020

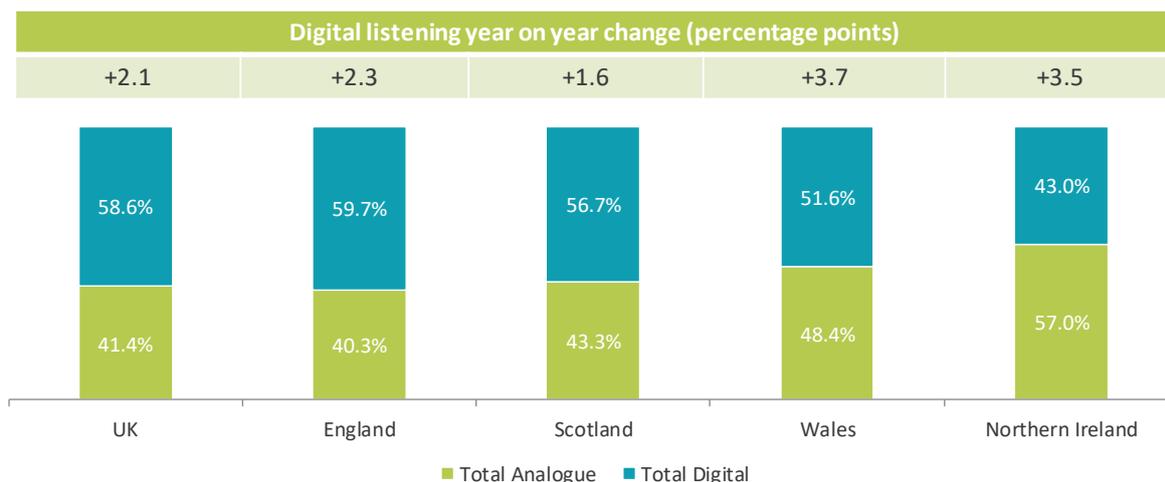


Source: RAJAR, all adults aged 15+, Q1 of each year, BBC Radio Scotland TSA

Scotland’s digital listening proportion is lower than that across the UK as a whole

With a year-on-year increase of 1.6 percentage points, digital listening in Scotland ranks behind England but ahead of Wales and Northern Ireland as a proportion of total listening. Across the UK in its entirety, digital listening made up 58.6% of total listening in Q1 2020.

Figure 27: Share of listening hours via digital and analogue platforms



Source: RAJAR, All adults (15+), Q1 2020; within the BBC Radio TSA for each nation.

Two-thirds of adults in Scotland owned a DAB radio in Q1 2020

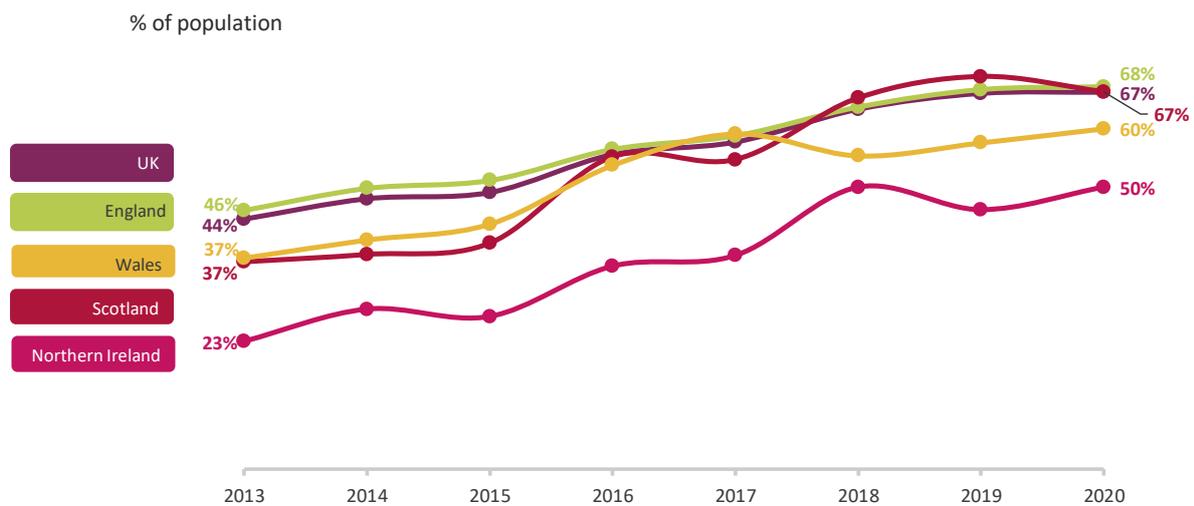
When including ownership both at home and in the car, two-thirds of adults in Scotland owned a DAB radio at the start of 2020, the same proportion as across the UK as a whole (see Figure 28).³⁴

Among radio listeners in Scotland, 42% had an active DAB radio in the home which was comparable to 2019. When asked about their intentions, 7% of radio listeners in Scotland who don’t yet own a DAB set said they were likely to purchase one in the next 12 months.³⁵

³⁴ RAJAR, Q1 2020

³⁵ Ofcom Technology Tracker 2020

Figure 28: DAB ownership



Source: RAJAR, All adults 15+, Q1 in each year England = BBC Local Radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA.

Ofcom sets out licensing plans for small-scale DAB radio

Small-scale DAB will expand local digital radio coverage and ensure that listeners will be able to tune into a diverse range of radio services across the UK on the digital audio broadcasting platform.

This platform uses freely available software and computer technology to transmit digital radio services and broadcast them to a relatively small geographic area. It allows stations to use inexpensive equipment to get on air for far less money than was previously possible.

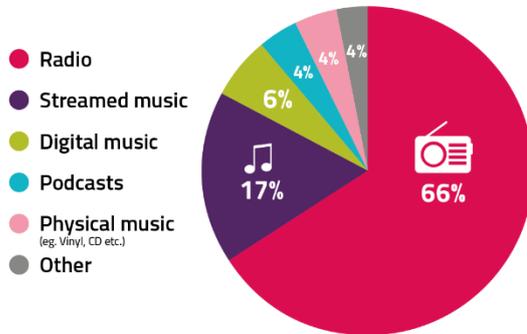
Ofcom will advertise multiplex licences for small-scale DAB in batches, starting in September 2020 with 25 local areas across the UK, including Edinburgh, Glasgow and Inverclyde.

Community radio applications, in the form of the new Community Digital Sound Programme ('C-DSP') licences, will open for each local area at the same time as the publication of multiplex licence advertisements.

Small-scale DAB will give community radio, smaller commercial radio stations and new entrants an affordable pathway to terrestrial digital radio, ensuring the continued availability of a diverse range of radio services across Scotland.

Audio trends

Live radio is the most popular listening activity in Scotland

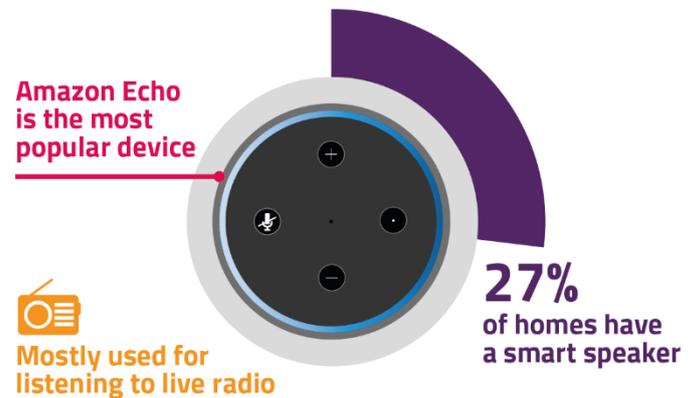


Of all the time spent each week listening to any type of audio, 66% was to radio, including live, listen-again and radio podcasts in 2019. This is lower than the proportion of time spent on radio across Great Britain (72%). Adults in Scotland spent more of their listening time on streamed music – such as Spotify and Apple Music – (17%) compared to adults across Great Britain (13%).³⁶

More than a quarter of Scottish homes have smart speakers

A significant amount of new digital listening is done through smart speakers. Just over a quarter of homes in Scotland have smart speakers (27%).

The Amazon Echo is by far the most popular smart speaker (in 89% of smart speaker homes). The most-cited use of smart speakers among users in Scotland was for listening to live radio (65%).³⁷



³⁶ Source: TouchPoints 2019. Base: Government Office Region: Scotland. Figures don't add up to 100% due to rounding.

³⁷ Ofcom Technology Tracker 2020

UK government's digital radio and audio review

The UK Department for Digital, Culture, Media & Sport (DCMS) has announced a review of digital radio and audio to ensure that radio is fit for the future, given changing listener trends. The review will:

- assess future scenarios for the consumption of UK radio and audio content on all radio and online platforms, and assess the impact of these scenarios on access to UK radio services;
- assess the impact of likely models of future listener trends on current and future distribution strategies for UK radio groups and industry; and
- make recommendations on further measures and collaborative actions to strengthen the UK radio and audio industry for the benefit of all listener groups and to promote innovation.

DCMS expects to publish its report on this by March 2021.

One in six adults in Scotland listen to podcasts each week

One in six people aged 15+ in Scotland (16%) listen to podcasts each week; 3% doing so daily.³⁸ Almost half of podcast listeners³⁹ (47%) use their mobile phone for this audio activity, with half this proportion using either a smart speaker (28%) or DAB radio (22%).⁴⁰

There is no clear favourite type of podcast among listeners in Scotland. Similar proportions⁴¹ listen to: catch-up versions of BBC radio programmes (41%), such as *Desert Island Discs*; non-BBC radio stations (38%), such as *The Frank Skinner Show*; podcasts that have video versions (26%), such as TED talks; other podcasts from the BBC (24%),⁴² such as *That Peter Crouch Podcast*; podcasts linked to TV programmes (22%); and podcasts made by newspapers or magazines (21%).

Podcasts in Scotland

In February 2020, *The Big Light* launched as Scotland's first podcast network. Founded by broadcaster Janice Forsyth and former TV producer Fiona White, the network has launched a range of podcast series, including *Talk Media* with Stuart Cosgrove and Eamonn O'Neill and *The Tartan Noir Show* which celebrates Scotland's crime fiction authors.

The popular football website *Open Goal* was able to capitalise on the success of podcasts like *Si Ferry meets...* and *Keeping the Ball on the Ground* by selling out a live event at the Hydro in Glasgow for May 2020, although this was subsequently postponed due to the Covid-19 pandemic.

Visit Scotland partnered with Bauer to launch *100,000 Welcomes* in September 2019, a five-part series to promote tourism in Scotland.

³⁸ RAJAR Q1 2020, UK

³⁹ Note that the sample size for podcast listeners in Scotland is below 100, therefore the data is indicative only and should be treated with caution

⁴⁰ Ofcom Technology Tracker 2020

⁴¹ Although the proportions of podcast types listened to vary here, they are not statistically significantly different due to the low sample size

⁴² Other podcasts from the BBC are those that were not originally broadcast on radio and not linked to TV programmes