



Media nations: Scotland 2021



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Overview

This *Media Nations: Scotland* report reviews the main trends in the television and audio-visual sector as well as in the radio and audio industry in Scotland.

The report provides updates on several datasets, including data collected directly from licensed television and radio broadcasters (for output, spend and revenue in 2020), as well as Ofcom's own consumer research and BARB data (for audience consumption).

Due to the Covid-19 pandemic, some of the usual data sources – RAJAR (radio listening) and PSB Tracker (audience opinions) were not available this year.

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

TV services and devices

- As of Q3 2020, paid-for satellite and cable television services from Sky and Virgin Media were present in just over four in ten homes in Scotland (43%).
- Nearly two-thirds of households in Scotland (60%) have a subscription video-on-demand (SVoD) service from companies such as Netflix, Amazon, Disney+ or Now TV.
- Netflix is still the largest, with more than half (55%) of households having a subscription, followed by Amazon Prime Video (33%) and Disney+ (13%).
- The BBC iPlayer is the most popular broadcast video-on-demand (BVoD) player in Scotland, watched in about six in ten Scottish homes (61%). The STV Player (50%) was the next most popular BVoD player, followed by All4 (40%) and My5 (21%).

Broadcast TV viewing

- People in Scotland spent an average of 5 hours 9 minutes per day watching something on the television screen in 2020, up by 48 minutes since 2019.
- In 2020, broadcast TV viewing in Scotland bucked the long-term trend of decline, increasing for the first time in a decade. This can largely be attributed to the pandemic.
- On average, people in Scotland spent 3 hours 39 minutes per day watching broadcast TV on the TV set in 2020, the most of any nation in the UK.
- In the week commencing 23 March, when the UK Prime Minister announced the first national lockdown and the First Minister held a subsequent press conference confirming restrictions in Scotland, average daily viewing of broadcast television peaked at 4 hours 26 minutes.
- Viewing declined as lockdown restrictions eased but began to increase again from September, climbing to a second peak in November and December, as restrictions were tightened and people in Scotland spent most of the holiday period at home.
- Older people in Scotland continue to watch more broadcast TV than younger viewers. Those aged 55+ watched 6 hours 8 minutes on average a day in 2020, up by 12% compared to 2019, while those aged 16-24 watched just 72 minutes of broadcast TV a day, down 8% compared to 2019.

TV programming for and from Scotland

- There was a 25% decrease in spending on first-run content for viewers in Scotland in 2020, with spend on non-news/non-current affairs decreasing the most at 37%. Non-news/non-current affairs accounts for the largest share of first-run spend (51%) in Scotland.
- BBC hours of first-run content in Scotland grew by 3% in 2020 to 2,071 hours. Overall, news content makes up the largest amount of the BBC's output for Scotland, comprising 52% of first-run hours (including BBC ALBA).
- Some 4.1% of qualifying network spend on the PSB channels was on Scotland-based productions in 2020.

Radio and audio

- About three-quarters of adults in Scotland tune into the radio every week.
- Just over half of homes in Scotland have smart speakers (54%). The Amazon Echo is by far the most popular smart speaker (in 70% of smart speaker homes).
- The most-cited use of smart speakers among users in Scotland was for listening to music via a streaming service such as Spotify, Apple Music or Deezer (67%) followed by live radio (56%).
- It was a challenging year for the commercial radio sector, with revenues per head down 20% in 2020.

TV services and devices

Introduction

Long-established television platforms such as Freeview, which is available through digital terrestrial television (DTT), satellite – either from Sky or Freesat – and cable (Virgin Media) are still the main channels for delivering entertainment services to people’s homes.

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 though not universally available across Scotland. Satellite is nearly universally available,¹ while cable coverage is available mainly in built-up urban areas.

However, the main trend in recent years has been the rapid rise of new subscription video-on-demand (SVoD) services such as Netflix, Amazon Prime Video and Disney+, and this continued throughout 2020.

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 viewing share 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 on mobile phones, tablets and PCs.

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 (97%) had a TV set in 2020.² But the services accessed on our televisions are 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 in Scotland (44%) in 2020. Paid-for satellite accounts for most of these, with Virgin Media’s cable service present in just 12% of Scottish households in Q3 2020, down from 16% in Q1.

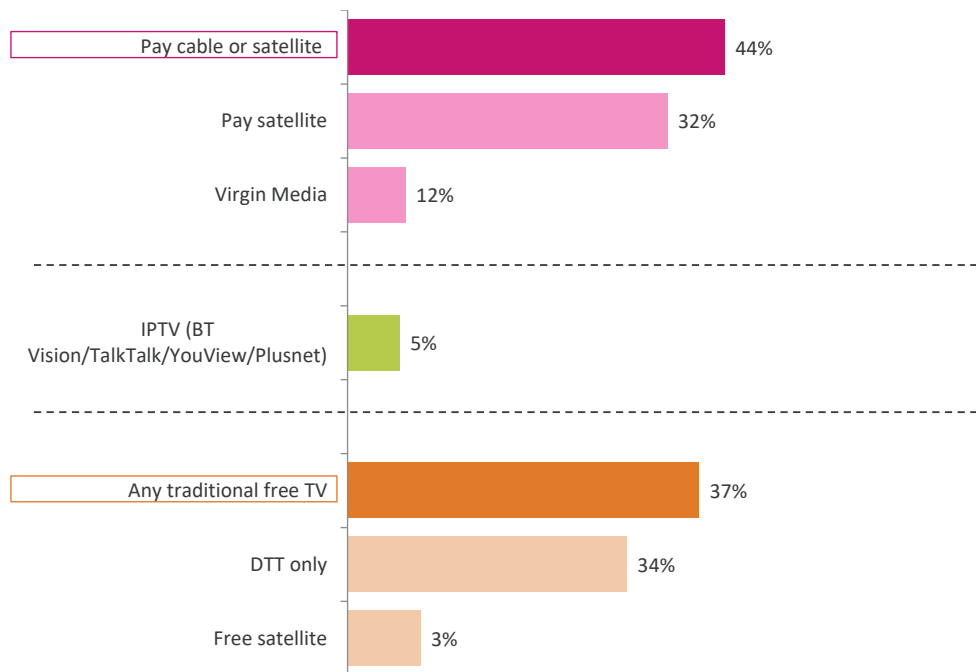
DTT services *only* (delivered through an aerial) account for most free TV viewing (34%), with free satellite present in just 3% of homes, probably through Freesat.

¹ Based on the availability of a line-of-sight path to the satellite

² BARB Establishment Survey Q3 2020.

Only a small proportion of homes in Scotland (5%) had an internet protocol television service (IPTV). These are delivered through set-top boxes from providers including TalkTalk and BT, and offer a Freeview service alongside pay-TV channels delivered through an internet connection.

Figure 1: Take-up of TV platforms in Scotland



Source: BARB Establishment Survey Q3 2020

Subscription video-on-demand

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

More than nine in ten (94%) homes in Scotland had an internet connection at the beginning of 2021 (88% have fixed broadband).³

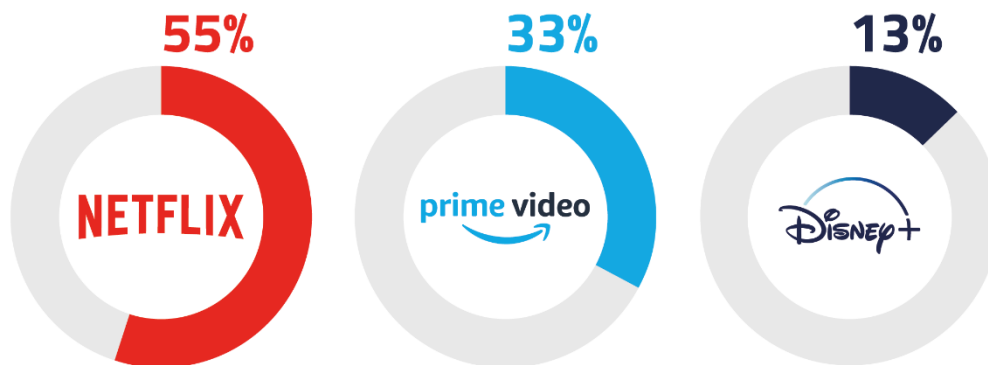
A combination of factors made 2020 a landmark year for subscription video-on-demand (SVoD), both in the UK and internationally; total global SVoD subscriptions increased by an estimated 300 million, passing the one billion threshold to reach 1.18 billion.

Disney+ has become the third most popular subscription video-on-demand service in Scotland

In Scotland, subscription video-on-demand services (SVoDs) saw an uplift in 2020, with 60% of households subscribing to at least one of them. Netflix is still the largest; more than half (55%) of households have a subscription, followed by Amazon Prime Video (33%) and Disney+ (13%).

³ Ofcom Technology Tracker 2021

Figure 2: Use of SVoD services in Scotland (% of households)



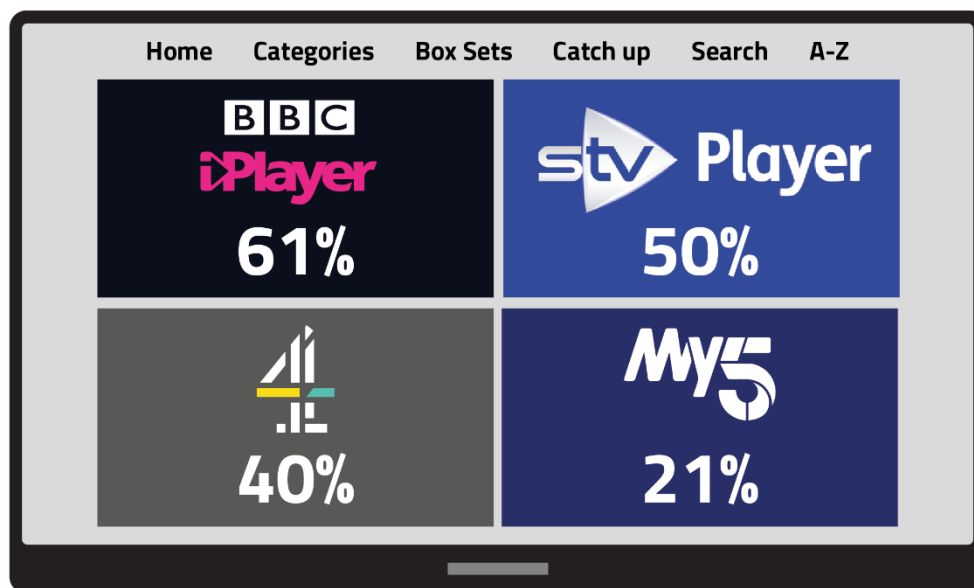
Source: BARB Establishment Survey Q3 2020

Broadcaster video-on-demand

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

The broadcaster video-on-demand (BVOD) players from the BBC, STV, ITV, Channel 4 and Channel 5 are also proving popular with viewers. The most popular, the BBC iPlayer, was watched in more than six in ten Scottish homes (61%). The STV Player (50%) was the next most popular BVOD player, followed by All4 (40%) and My5 (21%).

Figure 3: Use of main broadcaster video-on-demand (BVOD) services in Scotland (% of households)



Source: Ofcom Technology Tracker 2021

STV Player goes UK-wide

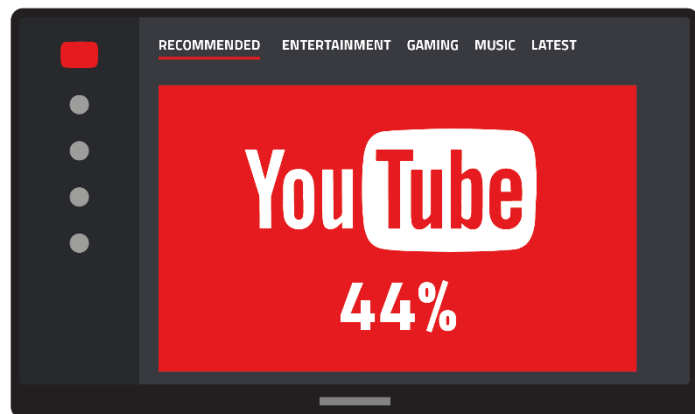
STV's online video-on-demand service, STV Player, was launched across the whole of the UK in 2020 and is now available on all major platforms. The service is now pre-installed in about 70% of the UK's connected TV homes, as it was launched on Freeview Play in August 2020, and on Sky+, Sky Q and Now TV by the end of 2020. It is also available on YouView and Freesat.

STV Player's viewers base rose significantly in 2020 with online viewing up by 68%, video-on-demand viewing up 57% and live simulcast viewing up 97%.⁴ Early in 2021, it announced the launch of a new rewards programme, becoming the first BVOD platform to introduce such a scheme in the UK.⁵

The Player had its highest-ever viewing figures throughout the delayed 2020 European Championships; STV's coverage of the Denmark vs England semi-final on 7 July 2021 was streamed 494,000 times through STV Player, becoming its most-watched live event since its launch in 2009.⁶

More than two in five homes in Scotland use YouTube

Research carried out for Ofcom's *Online Nation 2021* report⁷ showed that UK adult internet users spent an average of 3 hours 37 minutes a day online on computers, tablets and smartphones in 2020; 9 minutes more than in 2019⁸. Most of this was due to time spent using connected TVs – whether for video-on-demand viewing, online gaming, or watching YouTube or TikTok. Ofcom's estimates suggest that UK individuals, including children, spent 81 minutes per day watching these services on the TV set in 2020.



Over two in five households in Scotland (44%) used YouTube to watch programmes, shows or films at the beginning of 2021.⁹ This figure could therefore exclude other types of content such as short clips.

⁴ STV, [Annual Report and Accounts 2020](#).

⁵ STV, [STV Player becomes first UK BVOD to launch VIP rewards scheme](#), 17 June 2021.

⁶ STV, [Back of the Net – Euro 2020 tournament breaks viewing records for STV](#), 12 July 2021.

⁷ https://www.ofcom.org.uk/_data/assets/pdf_file/0013/220414/online-nation-2021-report.pdf

⁸ Comscore MMX Multi-Platform, Total Internet, Age 18+, monthly average 2019 and 2020, UK.

⁹ Ofcom Technology Tracker 2021.

TV viewing trends

The pandemic led to increases in all forms of TV viewing in Scotland

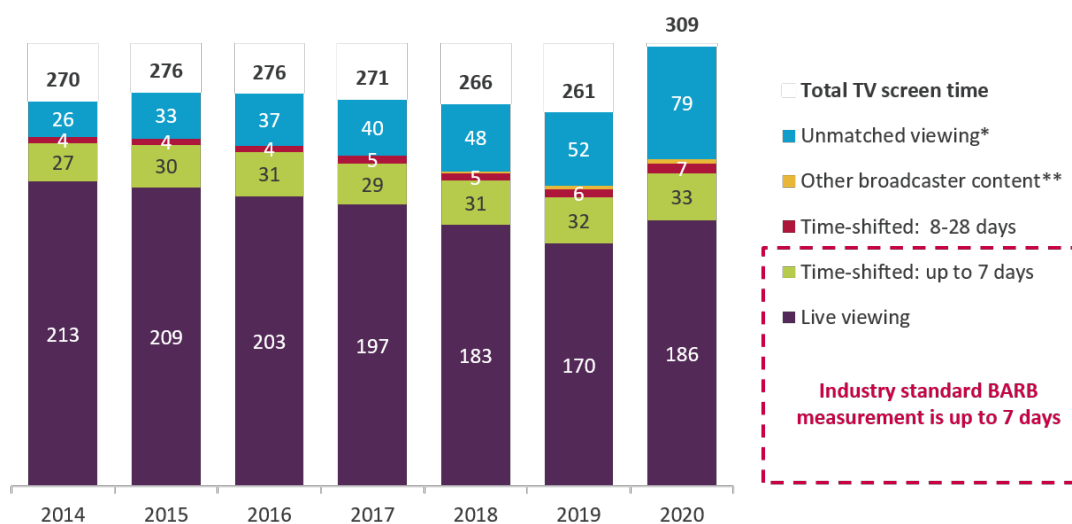
Government lockdown restrictions in response to Covid-19 affected all aspects of the broadcasting sector in Scotland in 2020. As the public stayed at home, they turned to their television to keep them entertained and updated with news about the pandemic.

Total viewing on the television screen in Scotland was up by 48 minutes compared to 2019, at an average of 5 hours 9 minutes per person per day. The bulk of this was still spent watching broadcast TV (3 hours 39 minutes), up by 17 minutes compared to 2019. This increase reversed a long-term trend of decline in broadcast TV viewing and can largely be attributed to the pandemic.

However, much of the rise in total viewing came from non-broadcast services on the TV set (classified as ‘unmatched’ by television measurement agency BARB and including YouTube, gaming, and streaming services like Netflix and Amazon Prime), which increased by 52% since 2019 to 1 hour 19 minutes in 2020.

And yet, despite the increase in total broadcast TV viewing time during 2020, the proportion of people who watched broadcast TV on average in a week (average weekly reach¹⁰) remained below 2019 levels for every month of 2020. The average weekly reach for all measured broadcast TV in Scotland in 2020 was 83.7%, compared to 86.2% in 2019.

Figure 4: Average daily minutes of TV screen time, per person, in Scotland



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

¹⁰ Reach criteria for all broadcast TV: 15+ consecutive minutes.

AVoDs that has not broadcast on linear television channels. For example, BVoD exclusives and historical box sets. Note: this was included within unmatched viewing in previous Ofcom reports.

Trends in TV viewing during the year largely mirrored Covid-19 restrictions

Viewing figures from the end of March 2020 onwards reflected the changing behaviour of viewers as the UK moved through the pandemic.

In the week commencing 23 March, when the UK Prime Minister announced the first national lockdown and the First Minister held a subsequent press conference confirming restrictions in Scotland, average daily viewing of broadcast television peaked at 4 hours 26 minutes.

Viewing remained relatively high throughout April (up by 23% on April 2019) but declined as lockdown restrictions eased and viewing of news programming reduced, although it remained higher than 2019 levels for every remaining month of 2020. Viewing began to increase again from September, climbing to 3 hours 58 minutes per day in December, as restrictions were tightened and people in Scotland spent most of the holiday period at home. Viewing peaked in January 2021, at four hours per day, when schools and colleges were moved to online learning and other strict restrictions were put in place in Scotland. As some restrictions were lifted, viewing decreased and fell below 2020 levels in March, April and May 2021. Viewing remained above 2019 levels in these months.

Unmatched viewing retained much of the uplift it had achieved in the first lockdown, and remained consistently higher in 2020 than in 2019. This was largely due to the increased popularity of subscription streaming services such as Disney+ and Netflix. Unmatched viewing peaked in January 2021, with people in Scotland watching an average of 1 hour 53 minutes per day (up 78% on the previous January). Unmatched viewing remained higher than in previous years until April 2021, when it then dropped below 2020 levels.

Figure 5: Total broadcast TV and unmatched viewing (daily minutes per person) in Scotland



Source: BARB 7-day consolidated viewing. All individuals (4+). BBC Scotland area

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.

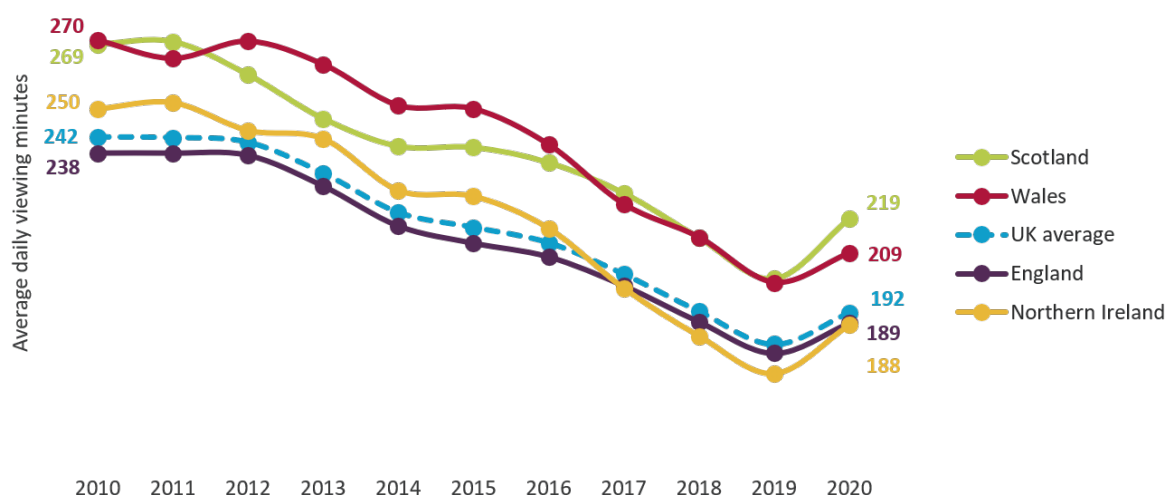
Unless otherwise stated, figures quoted are for seven-day consolidated viewing on a TV set. Consolidated viewing includes viewing of programmes at the time they were broadcast on TV (live viewing) as well as from recordings on digital video recorders (DVRs) and through catch-up player services (e.g.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

Scotland watched the most broadcast TV of any UK nation in 2020

On average, people in Scotland spent 3 hours 39 minutes per day watching broadcast TV on the TV set in 2020, the most of any nation in the UK. This was a 17-minute increase on 2019, up from 3 hours 22 minutes.

Proportionally, daily viewing in Scotland increased by 8.5% between 2019 and 2020, compared to the UK average of 5%. Scotland experienced the largest increase in daily viewing for all of the UK nations. This is the first year-on-year increase in Scotland since 2011 and can be attributed to the pandemic.

Figure 6: Average daily minutes viewed per person, by nation: 2011-2020



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

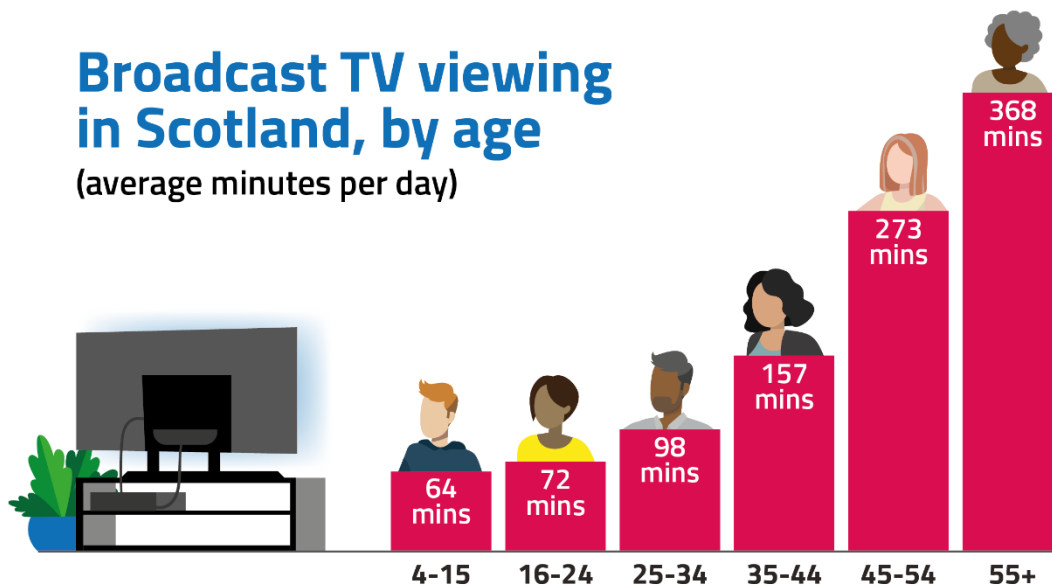
Older viewers drove the increase in broadcast TV viewing in Scotland – but unmatched viewing increased among all age groups

As in the rest of the UK, older people in Scotland continue to watch more broadcast TV than younger viewers.

The over-54s watched an average of 6 hours 8 minutes per person per day in 2020, up by 12% on 2019. Viewing also increased among 45-54 year-olds, up by 14% to 4 hours 33 minutes. Those aged 35-44 increased their viewing by an average 5%.

In contrast, broadcast viewing declined by 15% among 25-34 year-olds, dropping to 1 hour 38 minutes on average per day. Young people continued to watch less broadcast television in general, with 16-24 year-olds watching 72 minutes (a decrease of 8% on 2019) and those aged 4-15 watching 64 minutes per day, a one-minute drop since 2019.

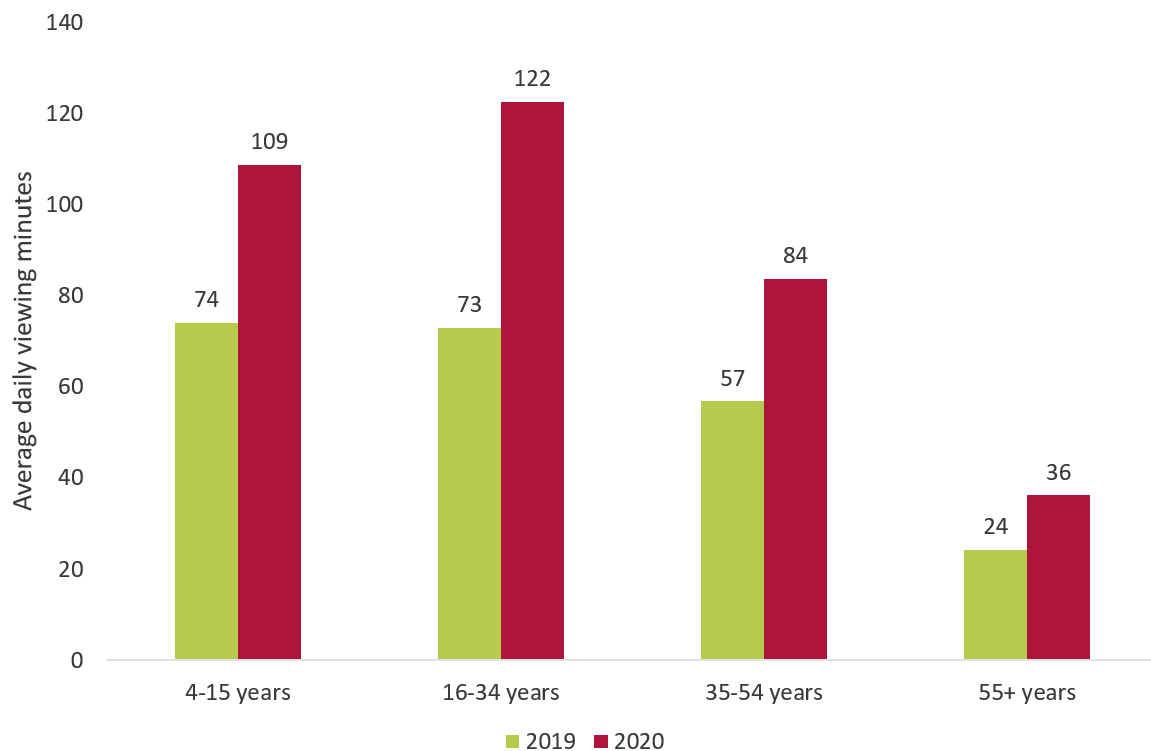
Figure 7: Average daily minutes viewed, by age group



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

Younger people in Scotland watched more non-broadcast TV on the television set than older viewers, although viewing increased among all age groups in 2020. Those aged 16-34 watched more than any other age group at 2 hours 2 minutes per day, up by 67% compared to 2019. Over-54s watched the least, at 36 minutes per day, although viewing also increased significantly among this age group, up by 50% on 2019.

Figure 8: 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.

Only an Excuse? was the most-viewed TV programme of 2020

The hour-long special-edition final of *Only an Excuse?* was the most-watched television programme in Scotland in 2020. Airing on BBC One on Hogmanay, the show achieved an average audience of just under 1.17 million (a 48.6% share of the viewing).

Broadcast on the same night, *Hogmanay* on BBC One was also among the top five programmes of the year.



BBC One and STV/ITV dominated the rankings, taking all but one of the top 20 spots – the exception was Channel 4’s *The Great British Bake Off*.

Figure 9: Top 20 most-watched programmes in Scotland: 2020

Rank	Programme Title	Channel	Date	Average 000s	Share %
1	Only an Excuse?	BBC One	31/12/2020	1,167	48.6
2	I'm a Celebrity... Get Me Out of Here!	STV/ITV	15/11/2020	1,139	49.4
3	Strictly Come Dancing	BBC One	19/12/2020	1,111	51.8
4	Hogmanay	BBC One	31/12/2020	1,069	54.7
5	The Great British Bake Off	Channel 4	24/11/2020	1,054	42.7
6	Des	STV/ITV	14/09/2020	1,053	45.8
7	Reporting Scotland	BBC One	19/12/2020	1,043	52.1
8	BBC News Special	BBC One	23/03/2020	1,017	36.1
9	Prime Ministerial Statement	BBC One	10/05/2020	1,007	45.9
10	Ant and Dec's Saturday Night Takeaway	STV/ITV	21/03/2020	990	48.6
11	The Nest	BBC One	05/04/2020	990	35.7
12	Britain's Got Talent	STV/ITV	11/04/2020	954	48.3
13	An Address by Her Majesty The Queen	BBC One	05/04/2020	892	33.8
14	Coronation Street	STV/ITV	30/03/2020	844	42.7
15	The Salisbury Poisonings	BBC One	14/06/2020	834	44.6
16	Emmerdale	STV/ITV	24/03/2020	802	37.9
17	Silent Witness	BBC One	07/01/2020	796	34.1
18	Still Game	BBC One	31/12/2020	796	56.7
19	Van der Valk	STV/ITV	26/04/2020	775	33.7
20	BBC News at Six	BBC One	10/04/2020	769	42.2

Hogmanay programming in Scotland

The edition of *Only an Excuse?* on 31 December 2020 was its final episode after 27 years on air and featured snippets from previous editions as well as new sketches and celebrity appearances. The programme, which was usually in a half-hour slot, starred the comedian Jonathan Watson alongside a range of celebrity guests. It had featured in the top 20 most-watched programmes in Scotland in each Media Nations report, attracting an audience of over 950,000 viewers in 2017, 2018 and 2019.

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. 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 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 2020, the main five PSB channels accounted for a combined 51.9% share of the total broadcast TV audience in Scotland. This was a small increase from 51.8% in 2019. BBC One had the highest audience share of any individual PSB channel, at 20%, although this was lower than BBC One's share in the other nations.

Figure 10: Percentage share of total TV viewing for the five main PSB channels, by nation: 2020

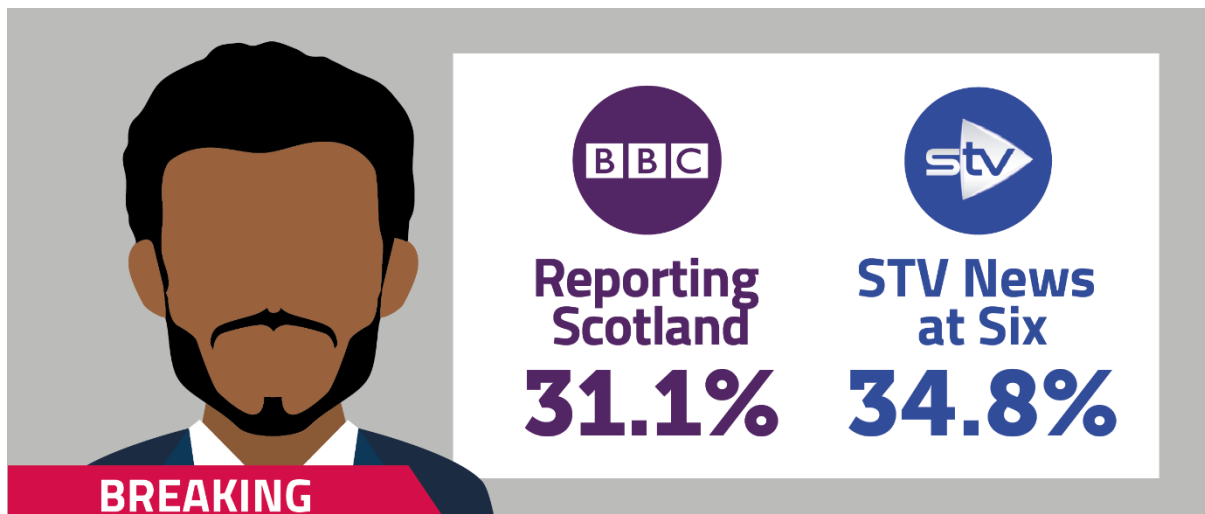


Source: BARB. BBC areas, all individuals (4+). Excludes any +1 channels.

The pandemic led to a surge in news viewing

News viewing across the UK increased in 2020 as the public sought information on the unfolding pandemic and changing government restrictions. In Scotland, the average audience share of BBC One Scotland's early evening news bulletin, *Reporting Scotland*, was 31.1%, up from 27.7% in 2019. The average audience share of viewing of *STV News at Six* was higher still, at 34.8%, up from 30.2% in 2019.

Figure 11: Audience share of BBC One Scotland and STV early evening news: 2020



Audience share of early evening news in Scotland

Source: BARB. All individuals (4+). Note: Early evening ('local') news bulletin figures run by programme title, weekdays and include the +1 channels where applicable. BBC One's early evening news bulletin, Reporting Scotland, is transmitted between 18:30-19:00 and analysis is based on BBC areas. STV's News at Six is transmitted between 18:00-18:30 and analysis is based on the ITV Scotland area (note STV has the Channel 3 licenses for Central and North Scotland areas).

The ITV network news bulletin has a higher audience share in Scotland than the UK average

The average audience share of the national *BBC News at Six* in Scotland was 27%, below the UK average of 32.2%. The average audience share of the UK-wide *ITV Evening News* was 26.9%, higher than the UK average of 21.5%.

Ofcom calls for stronger system of public service media fit for the digital age

Ofcom is [recommending a radical overhaul of laws](#) to ensure that public service media survives and thrives in the digital age.

Our recommendations to the UK Government mark the conclusion of [Small Screen: Big Debate](#) – an in-depth review on the future of public service media (PSM). The report calls for the renewal of the PSM system to ensure it can flourish for the next decade and beyond.

During the course of the review, we spoke to audiences of all ages and backgrounds right across the UK, including at events held in Aberdeen, Stirling and Stornoway in early 2020. We also met broadcasters, streaming services, academics and analysts at home and abroad. Our consultation received over 100 responses, with consensus on two fundamental issues – the importance of PSM for UK viewers, and the urgent need to update the system to ensure its future sustainability.

Public service content matters to people and society... but it's under increasing threat

Our review makes clear that public service programming remains highly valued by UK audiences, and the pandemic has only served to reinforce its role in society.

Our research findings emphasise the special importance viewers place on high-quality, trusted and accurate news. It reveals a passion for soaps, drama and live sports, which bring us together, as well as programmes which reflect the diversity of the UK's nations and regions. Public service media is also central to the UK's creative economy, with about £3bn spent each year on new commissions across a broad range of genres.

But with global competition intensifying, viewers are no longer bound by television schedules and can pick and choose content from a range of online providers and platforms. Given these changes, the UK's broadcasting industry is facing its greatest ever challenge.

A step-change in broadcasters' digital plans – and an overhaul of legislation

To secure the future of PSM, broadcasters must accelerate their digital plans if they are to maintain a strong link with audiences, and the regulatory system also needs to be urgently updated.

So, we are recommending that the UK Government brings forward primary legislation to:

- **Modernise the PSM objectives.** New legislation should secure and strengthen PSM's most important features: a broad range of programming that reflects all parts of the UK, and the ability to engage the widest possible audiences. There should also be a new objective to support the UK's creative economy.
- **Update availability and prominence rules to include digital platforms.** Broadcasters and connected-TV platforms are struggling to reach commercial agreements, making it harder for audiences to find PSM content on digital platforms than on traditional TV. So new rules are needed to require PSM providers to offer their on-demand services to popular TV platforms. In turn, platforms should be required to include and give appropriate prominence to PSM content. Ofcom should be given monitoring and enforcement powers, including the ability to resolve commercial disputes.

- **Update production rules for PSM content.** If PSM providers are to reach all audiences, they need to be able to commission content which they can deliver flexibly - both online and on broadcast TV. So we recommend that commissioning rules, designed to support independent productions, should apply to all PSM content, regardless of whether it is commissioned for broadcast TV or online. This would include programmes exclusively shown on online services.
- **Update the rules for PSM providers.** Broadcast licences need modernising to cover content produced across broadcast TV and online. PSM providers should be given the flexibility to innovate and respond to technological and market changes. Quotas should remain, to secure important PSM programming, like news, and to safeguard the quality of traditional broadcast TV for those audiences who continue to rely on them. PSM providers should be required to set out clear plans to deliver against their objectives, and report annually on their performance, with Ofcom holding them to account.

Transform and collaborate to compete

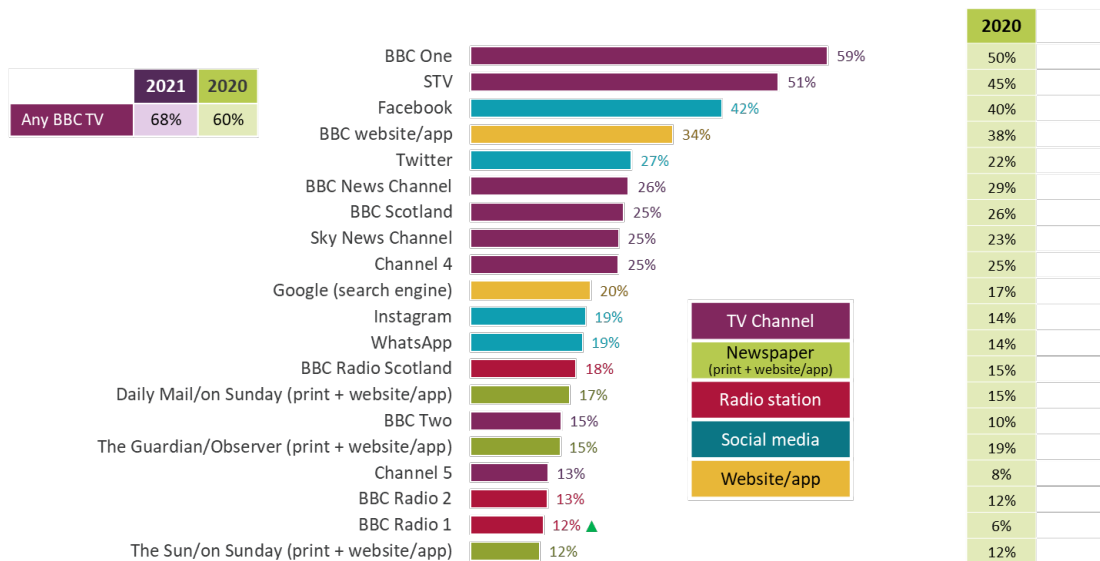
Legislative change to the existing framework alone is not likely to be enough to preserve the vital benefits of public service media; further radical approaches are required:

- **PSM providers must forge more ambitious strategic partnerships.** Deeper relationships between PSBs and other companies – particularly on platforms and distribution – could help them compete more effectively with global players and reach wider audiences. Channel 4 and Sky, for example, have recently expanded their existing partnership to cover content, technology and innovation.
- **Other companies should be encouraged to produce PSM programming.** The Government should consider how to encourage new providers to help deliver public service media in future. That could mean harnessing the broad range of high-quality, UK-based original news, drama and arts programming offered by existing commercial providers, such as Sky and Discovery. Or encouraging new providers of PSM or PSM-like content – for example, on social media platforms – to target audiences who don't connect with broadcasters on traditional TV platforms. Updated legislation should allow for complementary PSM providers to be added to the regulatory framework to maximise flexibility into the future.
- **Economic incentives to broaden PSM provision.** The Government should assess the case for financial support to add value for audiences in certain areas such as regional programming. This could be done through a range of incentives such as contestable funding or tax relief.

TV is the most-used source of news for people of Scotland

Three in five adults in Scotland (59%) use BBC One for news in general and half use STV (51%). Other TV channels, including BBC News Channel, BBC Scotland, Sky News Channel and Channel 4 made the top ten. Social media ranked highly too, with Facebook the third most-popular source of news (42%) and Twitter the fifth most-popular (27%). The BBC website/app was the highest-ranking website or app (34%) and BBC Radio Scotland was the top radio station cited (18%). Three newspapers made the top 20: Daily Mail/on Sunday, The Guardian/Observer and The Sun/on Sunday.

Figure 12: Top 20 sources of news in general in Scotland: 2021



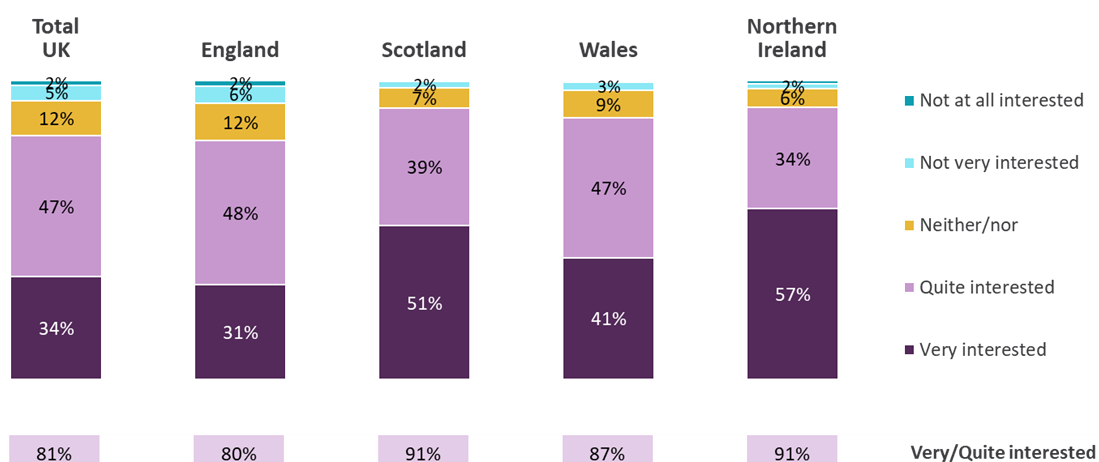
Source: Ofcom News Consumption Survey 2021 - ONLINE sample only. Base: All adults 16+ in Scotland – 2021=303, 2020=182. Green/red triangles indicate statistically significant differences between 2021 and 2020 online only samples. Note: data is not comparable to data in previous nations reports, due to Covid-19 enforced methodological changes.

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 (51%), rising to 91% who are ‘very’ or ‘quite’ interested.

As shown below, adults in Northern Ireland and Scotland are the most likely to say they are ‘very interested’ in news about their nation, whereas those in England and Wales are more likely to be ‘quite interested’.

Figure 13: Level of interest in news about own nation, by nation: 2021

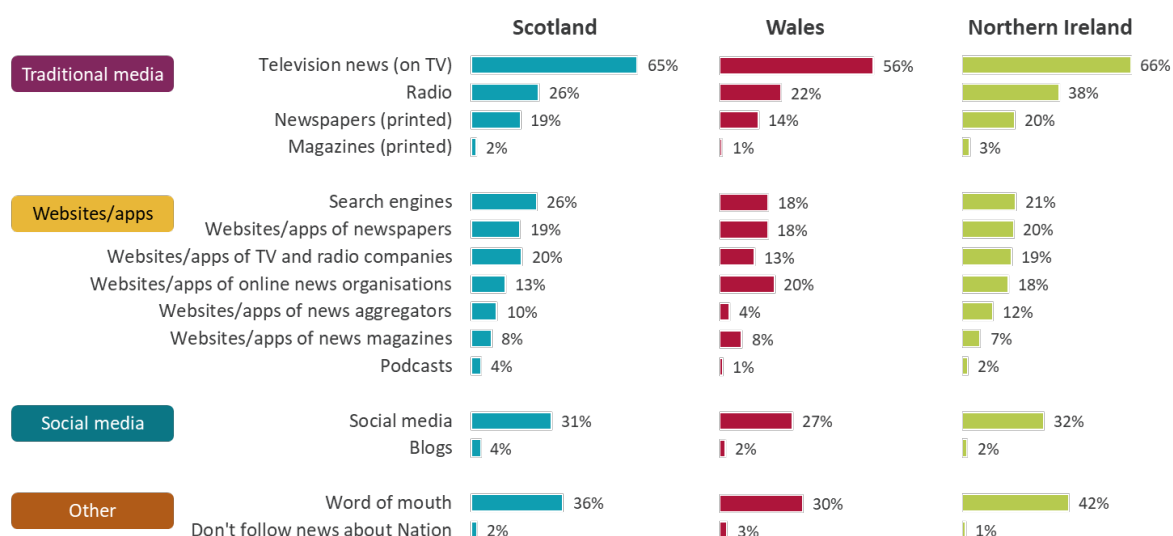


Source: Ofcom News Consumption Survey 2021 – combined CATI and online sample. Base: All adults 16+ who follow news in 2021 - Total=4499, England=3046, Scotland=518, Wales=466, Northern Ireland=469. Note: data is not comparable to data in previous nations reports, due to Covid-19 enforced methodological changes.

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; 26% of adults in Scotland reported using the radio as a news source, compared to 38% in Northern Ireland.

Figure 14: Platforms used to access news about own nation, by nation: 2021



Source: Ofcom News Consumption Survey 2021 – combined CATI and online sample. Base: All adults 16+ who follow news – Scotland=518, Wales=466, N Ireland=469. Note: data is not comparable to data in previous nations reports, due to Covid-19 enforced methodological changes.

More than a third 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. More than a third of people (36%) use STV, with about a quarter (26%) saying they use BBC One. This is followed by the BBC website/app (22%) and Facebook (20%).

Figure 15: Sources used to access news about own nation: 2021

England		Scotland		Wales		Northern Ireland	
BBC One	33% ▼	STV	36%	BBC One	33%	UTV	50%
ITV	20% ▼	BBC One	26%	ITV WALES	25%	BBC One	45%
Facebook	15%	BBC website/app	22%	Facebook	18%	BBC website/app	26%
BBC website/app	13% ▲	Facebook	20%	BBC website/app	17%	Facebook	26%
		Twitter	15% ▲	Any Wales based news site/app	11%	BBC Radio Ulster/Foyle	14%
		BBC Scotland TV	12% ▼	BBC Radio Wales/Cymru	8%	Any NI based daily newspaper	13%
		Google (search engine)	11%	Twitter	8%	Cool FM	13%
		BBC Radio Scotland	9%			U105	12%
		Any Scotland based daily paper	8%			Any NI based news website/app	12%
						Twitter	10%
						BBC News Channel	9%
						The Belfast Telegraph	7%
						Google (search engine)	7%
Don't follow Nation news	6%	Don't follow Nation news	3%	Don't follow Nation news	3%	Don't follow Nation news	0%

Source: Ofcom News Consumption Survey 2021 – online sample only. Base: All adults 16+ using TV/newspapers/radio/internet/magazine for news - England=2408, Scotland=290, Wales=242, Northern Ireland=243. Only sources with an incidence of >6% in each nation are shown. Green/red triangles indicate statistically significant differences between 2021 and 2020 online-only samples. Note: data not comparable to data in previous nations reports, due to Covid-19-enforced methodological changes.

Broadcasters adapt coverage of the Scottish Parliament election results

Due to the Covid-19 pandemic, broadcasters had to change the way they reported the results of the Scottish Parliament election in May 2021. Instead of the results being announced overnight, declarations were spread out – 48 constituencies declared on Friday and 25 constituencies and 56 list seats declared on Saturday.

BBC One Scotland hosted *Election 2021 Scotland* on Friday from midday until 8pm, featuring the latest developments along with a graphic explainer. Its coverage continued again throughout Saturday afternoon and evening, before an election-focused edition of *The Sunday Show* on Sunday morning¹¹. STV aired a *STV News Election Special* on both Friday and Saturday afternoons, presented from outside Holyrood and in STV's Glasgow studios, with key declarations brought to viewers live on air.¹² There was an hour-long special of *An Taghadh* on BBC ALBA on Friday, followed by a review of the results once they had all come in on Sunday.

On radio, BBC Radio Scotland simulcasted the BBC One Scotland coverage across the weekend, along with special analytical radio-only update shows. BBC Radio nan Gàidheal provided election news coverage throughout Friday and Saturday. There were also 12 bonus episodes of the weekly politics podcast, *Podlitical*, presented by BBC Scotland journalists.

¹¹ BBC, [Unrivalled coverage of the Scottish Parliament Election results over three days from BBC Scotland](#), 5 May 2021.

¹² STV, [STV announces Leaders' Debate programme and Election 2021 coverage](#), 6 April 2021.

TV programming for and from Scotland

Introduction

The pandemic has had marked effects on content investment and production across the UK. Social distancing restrictions first stopped content production, and then increased costs once production resumed. This has had an impact both on broadcasters and on commissioners seeking to maintain content pipelines, and on producers ensuring productions can continue in a Covid-safe manner.

Unsurprisingly, growth in the production sector slowed in 2020, but overall the industry looks well-placed to recover. However, the pandemic is likely to exacerbate some already existing trends in the sector, such as inflationary production costs, revenue challenges for the UK's public service broadcasters, and consolidation in the independent production sector.

For production in the nations and regions, restrictions meant that some productions could not take place during lockdown measures, or were delayed. This impacted some of the broadcasters' regional production targets for 2020, such as the BBC's spend quota on networked programming made in Scotland, and weekly hours of non-network programming for the Scotland Central and Scotland North Channel 3 licences. More information on broadcaster performance against these quotas can be found in Ofcom's PSB Annual Compliance Report.¹³

The BBC and STV/ITV provide programming specifically for viewers in Scotland across a range of genres, but most notably news output. There was a 25% decrease in spending on first-run content for viewers in Scotland in 2020, with spend on non-news/non-current affairs decreasing most, at 37%. Non-news/non-current affairs accounts for the largest share of first-run spend (51%) in Scotland.

BBC hours of first-run content in Scotland grew by 3% in 2020 to 2,071 hours. Overall, news content makes up the largest amount of the BBC's output for Scotland, comprising 52% of first-run hours (including BBC ALBA).

Scotland is an important source of production for PSB content shown across the UK. Some 4.1% of qualifying network spend on the PSB channels was on Scotland-based productions in 2020.

¹³ <https://www.ofcom.org.uk/tv-radio-and-on-demand/information-for-industry/public-service-broadcasting>

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 2020 terms.

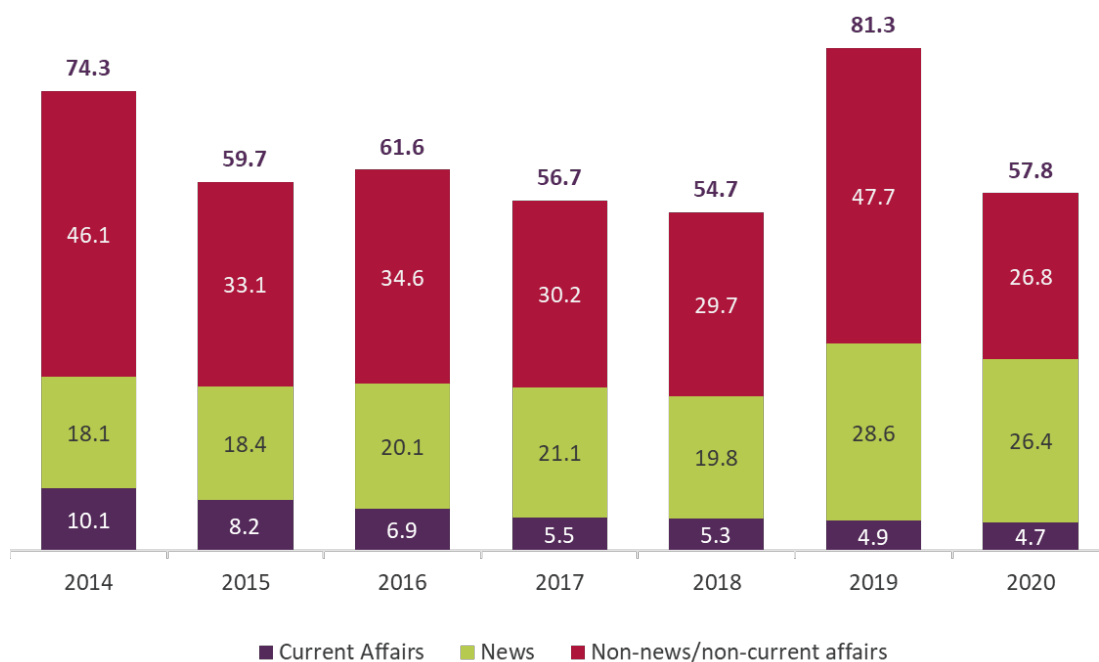
Spend on programming for Scotland

PSB spend on first-run content for Scotland fell across all genres in 2020

There was a 29% decrease in spending on first-run content for viewers in Scotland in 2020. Of the total £57.8m spend, 46% went towards non-news/non-current affairs, at £26.8m; a year-on-year fall of £21m.

Non-news/non-current affairs had the largest relative decline in first-run spend, down by 44% year on year. In contrast, PSB spend on news programming for Scotland fell by 8%.

Figure 16: PSB spend on first-run UK-originated content for Scotland, by genre (£m)

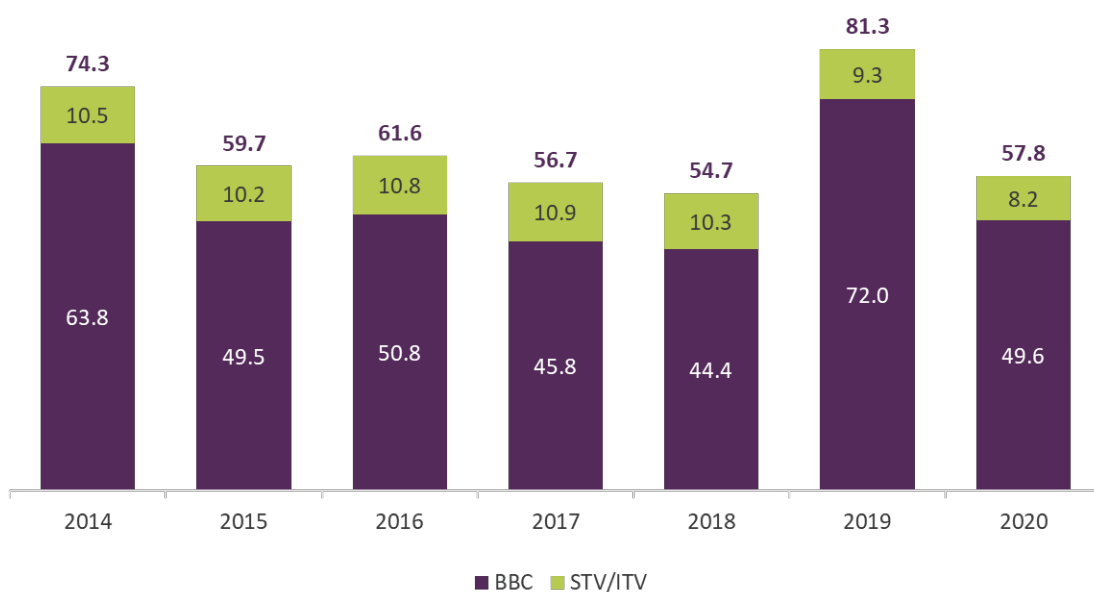


Source: Ofcom/broadcasters. Note: Figures are expressed in 2020 prices. Note: excludes BBC ALBA.

BBC and STV/ITV spend on first-run content for Scotland fell in 2020

The decrease in spend on first-run content is driven by the BBC, whose spend for Scotland was 31% lower than in 2019. In monetary terms, this is a decline of £22.4m to £49.6m. Spend by STV/ITV on first-run content for Scotland also decreased in 2020, down by 11%.

Figure 17: BBC and STV/ITV spend on non-network first-run UK-originated content for Scotland (£m)

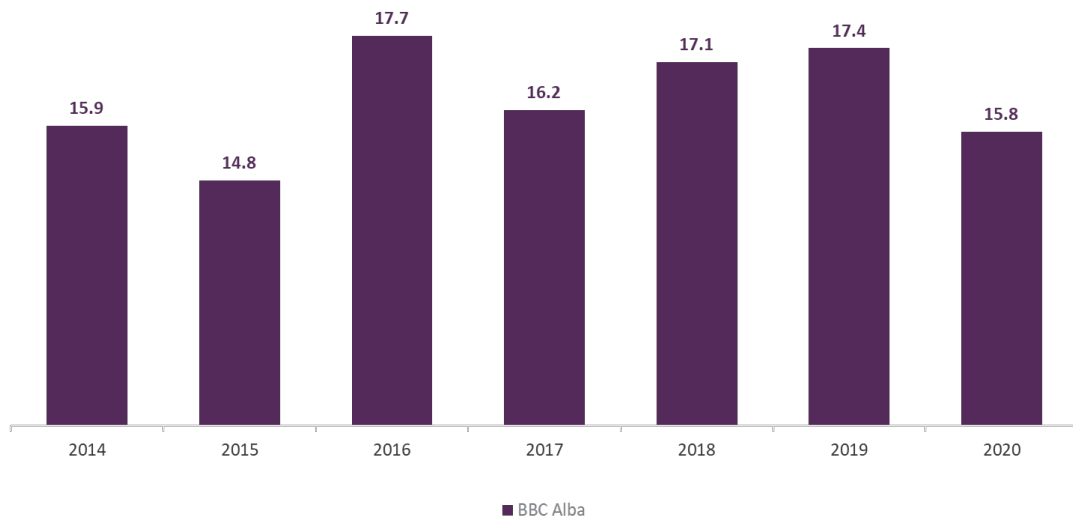


Source: Ofcom/broadcasters. Note: Figures are expressed in 2020 prices. Note: excludes BBC ALBA.

BBC ALBA spend on first-run content fell in 2020

BBC ALBA, the Gaelic-language channel run in partnership by MG ALBA and the BBC, spent £15.8m on first-run programming in 2020, a decrease of approximately £1.5m in real terms compared to 2019. It broadcast 556 hours of first-run content in 2020, down from 670 hours in 2019.

Figure 18: BBC ALBA spend on first-run UK-originated content (£m)



Source: Ofcom/broadcasters. Note: Figures are expressed in 2020 prices.

BBC ALBA supports learning during the pandemic

BBC ALBA, a Gaelic-language channel delivered in partnership between the BBC and MG ALBA, has provided a range of programming in Gaelic to support learning during the pandemic. Programmes such as Baile Mhuilinn, A' Bhùth, Leugh le Linda and Aithne air Ainmhidhean were screened daily and were available to watch later on the iPlayer. An additional learning collection was available on BBC ALBA's iPlayer channel in early 2021, including video content produced in Gaelic for primary literacy, mathematics, science and social studies¹⁴.

Throughout 2020/21, BBC ALBA's iPlayer views increased 3.5% year on year and Gaelic audience reach increased 3% to 59%. Time spent viewing the channel was also up 7% on the previous year¹⁵.

August will see the publication of MG ALBA's *Lèirsinn: Route Map for Gaelic Media*. The plans are expected to include analysis of how Gaelic public service media will play its part as a catalyst for the Gaelic language and cultural development over the next five years.

BBC ALBA a' toirt taic do dh'ionnsachadh tron mhòr-ghalair

Tha BBC ALBA, seanail a tha air a lìbhrigeadh ann an com-pàirteachas eadar am BBC agus MG ALBA, air raon de phrògraman a thabhann sa Ghàidhlig gus taic a thoirt do ionnsachadh tron mhòr-ghalair. Bha prògraman mar Baile Mhuilinn, A' Bhùth, Leugh le Linda agus Aithne air Ainmhidhean air an sgrionadh gach latha agus bha e comasach am faicinn an dèidh làimh air an iPlayer. Bha cruinneachadh a bharrachd de phrògraman ionnsachaidh rim faotainn air seanail iPlayer BBC ALBA aig toiseach 2021, a' gabhail a-steach susbaint bhidio a chaidh ullachadh sa Ghàidhlig airson litearrachd bun-sgoil, matamataig, saidheans agus eòlas-sòisealta.

Tro 2020/21 mheudaich àireamh luchd-amhairc iPlayer BBC ALBA 3.5% bliadhna air bhliadhna agus tha ruigsinn luchd-amhairc na Gàidhlig air meudachadh 3% gu 59%. Bha an ùine a bhathar a' cur seachad a' coimhead an t-seanail cuideachd suas 7% air a' bhliadhna ron sin.

San Lùnastal, foillsichidh MG ALBA *Lèirsinn: Mapa Slighe airson nam Meadhanan Gàidhlig*. Thathar a' sùileachadh gum bi na planaichean a' gabhail a-steach sgrùdadh air an dòigh sam bi seirbheis poblach nam meadhanan Gàidhlig a' cluich a phàirt mar chatailist airson na Gàidhlig agus leasachadh cultarail thar nan còig bliadhna ri teachd.

¹⁴ MG ALBA, [BBC ALBA to offer educational support during lockdown](#), 7 January 2021 / MG ALBA, [BBC ALBA a' tabhann taic ionnsachaidh tro àm a' ghlasaidh](#), 7 Faoilleach 2021

¹⁵ MG ALBA, [Annual report & statement of accounts 20/21](#) / MG ALBA, [Aithisg bhliadhnail & aithris nan cunntasan 20/21](#).

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 at least 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 must 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.

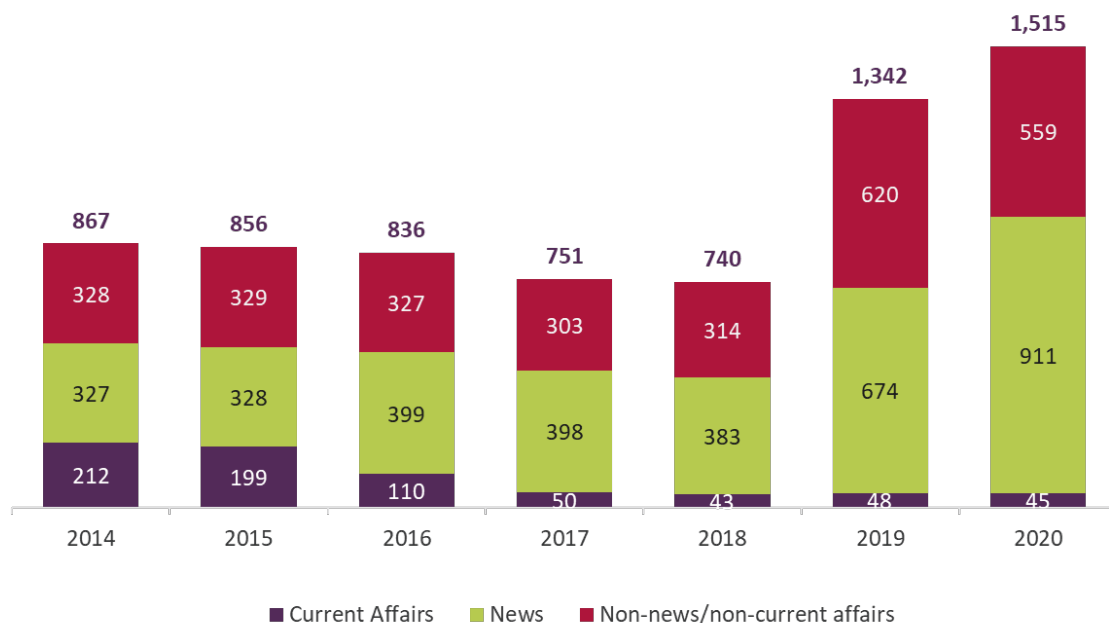
The BBC, through its operating licence which came into effect on 1 January 2018, must also fulfil regulatory conditions specific to Scotland. Among other things, this operating licence stipulates that in each financial year the BBC must ensure that in respect of BBC One Scotland and BBC Scotland taken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

BBC hours of first-run content in Scotland grew by 13% in 2020 to 1,515 hours

This growth in hours was driven by news content, for which hours increased by 35%, but was also the result of a full year of broadcast for BBC Scotland, which launched in February 2019. Overall, news content makes up the largest proportion of the BBC’s output for Scotland, comprising 60% of first-run hours in 2020 (excluding BBC ALBA).

Figure 19: BBC hours of first-run UK-originated content for Scotland, by genre



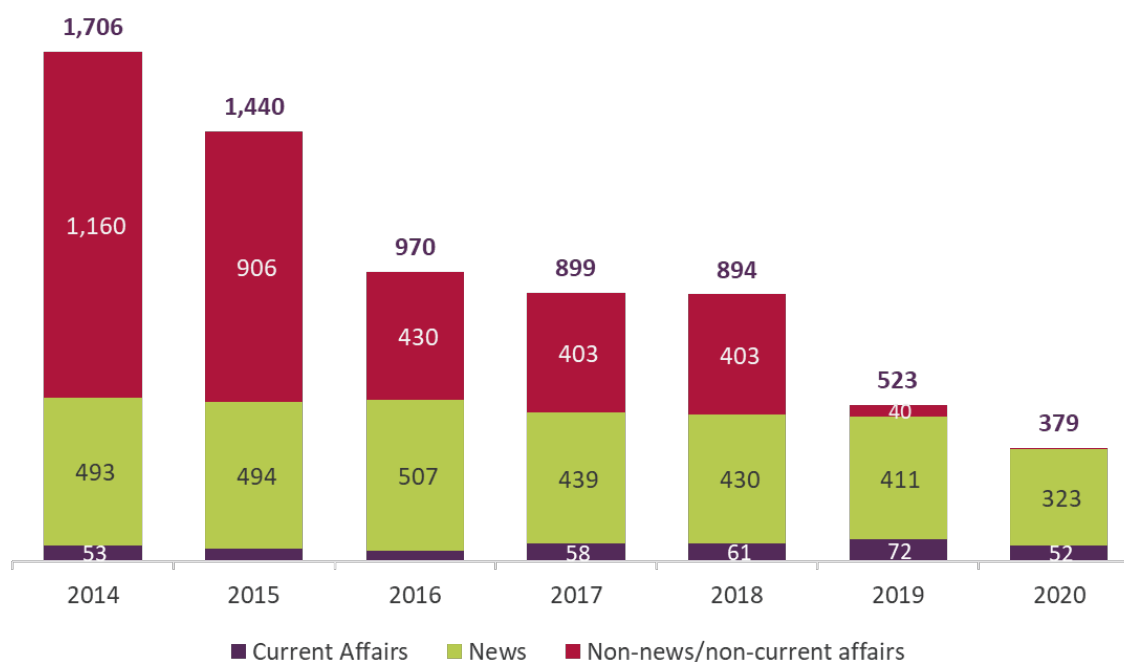
Source: Ofcom/broadcasters. Note: excludes BBC ALBA.

STV’s hours of first-run content for Scotland have fallen, with 379 hours of programme output in 2020

The vast majority of STV output is news content, comprising 85% (323 hours) of first-run programming on the channel. In response to the Covid-19 pandemic and during periods of lockdown, STV temporarily broadcast a pan-Scottish version of STV News, featuring reporters and technical staff from both STV North and STV Central licence areas, in order to sustain regional news coverage. This change resulted in the 21% decrease in first-run news hours, although it is expected that first-run news hours will recover.

The decrease in first-run STV hours overall has been across all genres; the largest fall has been for non-news/non-current affairs, dropping by 36 hours to reach 4 hours (90%) in 2020. The decline in STV first-run hours across genres is a result of the ongoing restrictions due to the pandemic.

Figure 20: STV hours of first-run UK-originated content for Scotland, by genre



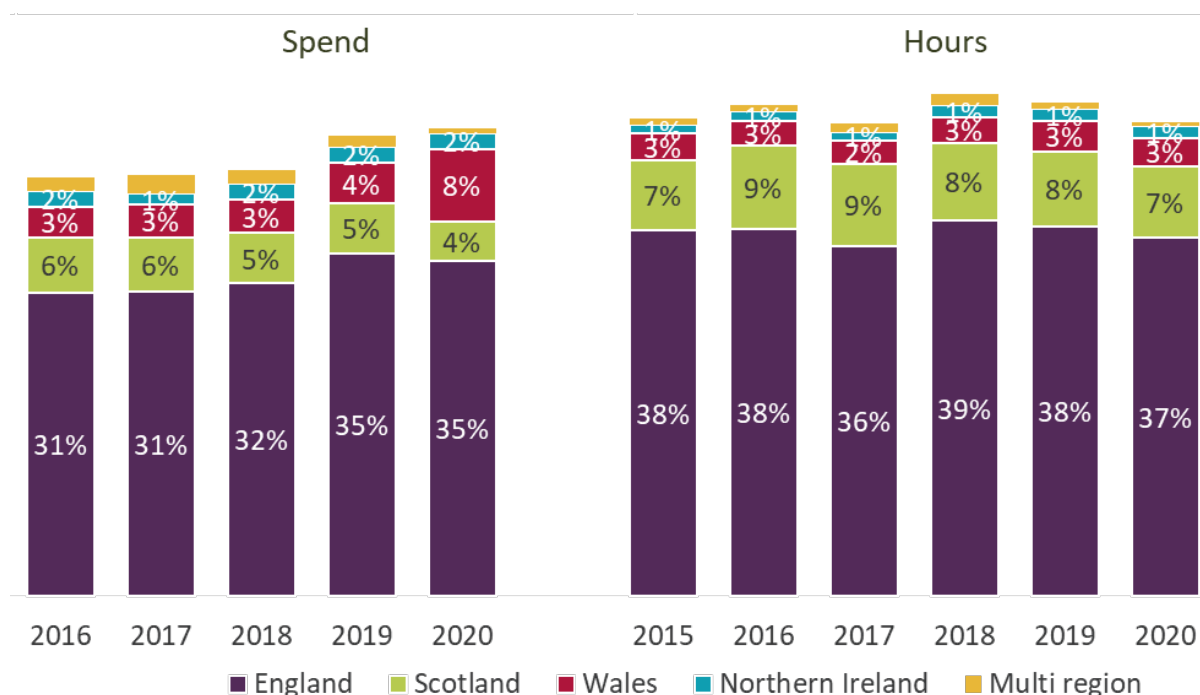
Source: Ofcom/broadcasters.

Network content produced in Scotland

Public service broadcasters producing and commissioning programmes to be first broadcast on their network TV channels must make sure these programmes are made in a range of places 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 also has an out-of-England quota. ITV and Channel 5 are not specifically required to make content outside England.

Across all the PSBs, 4.1% of qualifying first-run network spend in 2020 was allocated to programmes qualifying as Scotland productions, down from 5.1% in 2019. The proportion of hours was also slightly down on 2019, by 0.4pp, to 7.3% of hours.

Figure 21: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2016-2020



Source: Ofcom/broadcasters

New TV and film studio for Glasgow

In January 2021, Glasgow City Council announced the creation of a major television and film studio based in the city’s historic Kelvin Hall.¹⁶ The £11.9m production facility hopes to boost Glasgow’s dynamic screen and creative sectors at a time of increased demand for UK-based production facilities. Up to £7.9m of the funding will come from the Scottish Government, through Screen Scotland. The first part of the new screen hub could be ready to open later this year.

This will increase the studio space available in Glasgow and bring further investment to Glasgow’s creative sector, following Channel 4’s announcement in early 2021 that its features commissioning will move to its Creative Hub, based in Glasgow’s Merchant City, which opened in 2019.¹⁷

PSBs have decreased the proportion of their network content made in Scotland

The BBC, which is generally responsible for the majority of qualifying network content made in Scotland, reduced the proportion of its network spend in Scotland to 6.5% in 2020, but the proportion of hours increased, to 15.3%. The BBC continues to make drama series in Scotland, although the only title in 2020 in this category was new series *The Nest*.

¹⁶ Glasgow City Council, [Glasgow reveals studio plans for Kelvin Hall](#), January 2021.

¹⁷ Channel 4, [Channel 4 reconfigures Exec responsibilities to deliver new Future4 strategy](#), 27 January 2021.

The proportion of spend on qualifying productions in Scotland increased for Channel 4 and Channel 5 in 2020, with titles including Channel 4 drama series *Deadwater Fell* and Channel 5's factual title *Secret Scotland with Susan Calman*.

Figure 22: Proportion of qualifying network production in Scotland, by PSB: 2016-2020

		2016	2017	2018	2019	2020
BBC	Spend (%)	10.3	9.1	10.4	9.1	6.5
	Hours (%)	16.6	16.3	16.7	15.1	15.3
ITV	Spend (%)	0.02	0.9	0	0.4	0.8
	Hours (%)	0.03	0.2	0	0.2	0.3
Channel 4	Spend (%)	5.2	6.8	3.3	4.5	6.1
	Hours (%)	6.3	8.7	4.8	6.1	5.6
Channel 5	Spend (%)	0.2	0.5	0.7	2.4	3.8
	Hours (%)	0.1	0.6	0.3	1.1	1.6

Source: Ofcom/broadcasters

Broadcasters partner with National Film and Television School

The National Film and Television School (NFTS), which has a campus in Glasgow, has set up partnerships with the BBC and Channel 4 in recent months.

A three-year deal between the BBC and NFTS will strengthen skills development across the nations and regions, with NFTS providing 60 free short-course training opportunities for the BBC's small indie fund companies¹⁸. The BBC will sponsor 10 NFTS courses and 100 NFTS short course places.

A partnership with Channel 4 will enable virtual open days across the UK for production companies and freelancers, as well as a series of training and development programmes in the nations and regions to include masterclasses, presentations and workshops.¹⁹

¹⁸ NFTS, [BBC Announces Major New Partnership With NFTS To Support UK Creative Sector](#), 12 October 2020.

¹⁹ NFTS, [Channel 4 and NFTS Announce Partnership To Support Nations And Regions With Series of Training & Development Programmes](#), 3 March 2021.

Radio and audio

Introduction

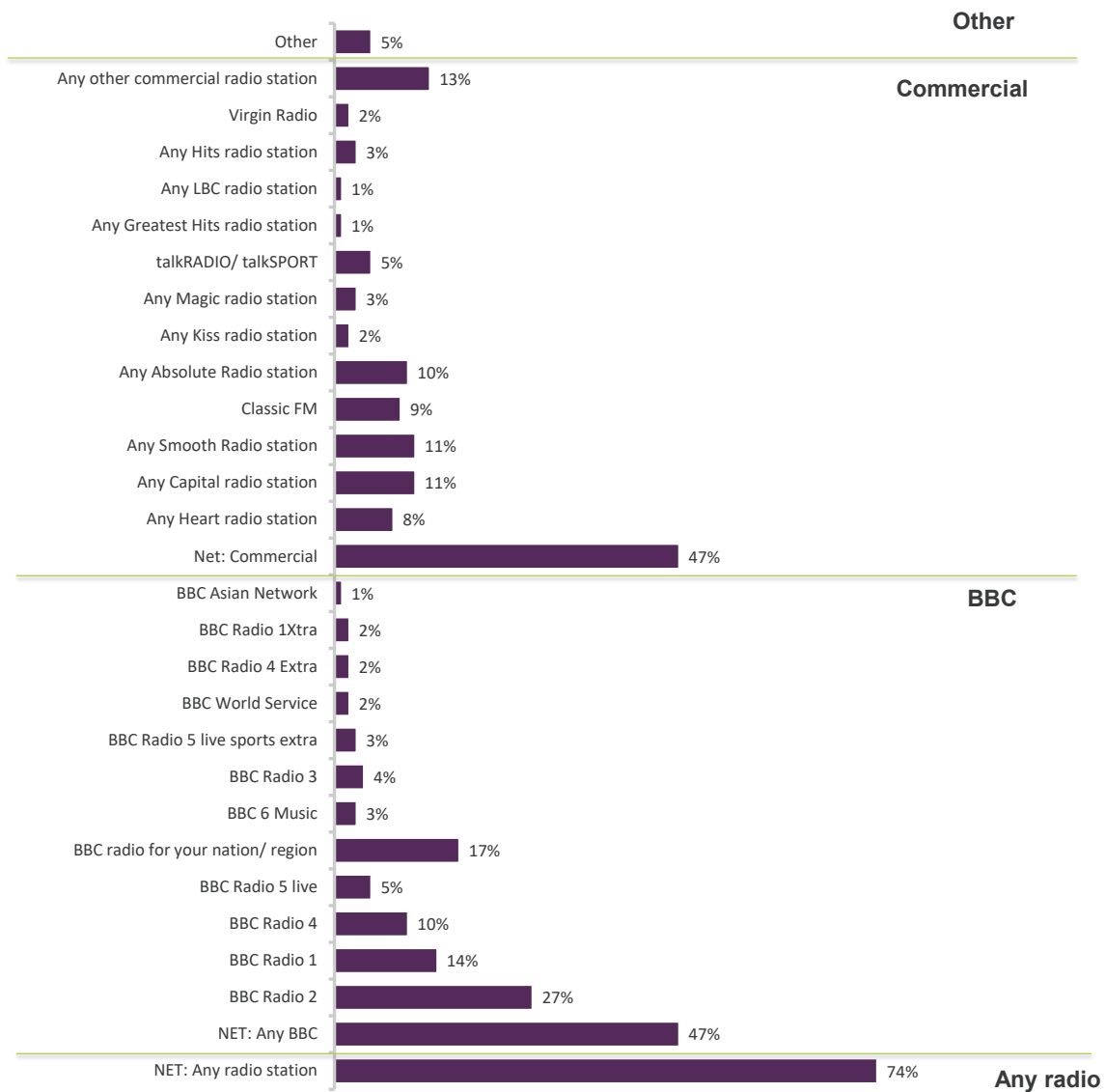
Due to the coronavirus pandemic and ensuing restrictions, the radio industry measurement body RAJAR suspended its fieldwork from the end of Q1 2020. As a result, we are unable to present the same extent of radio consumption data as in previous years. Instead, we have drawn from a range of Ofcom's own, syndicated and third-party consumer research to provide a snapshot of audio consumption in 2020, although these are not directly comparable with RAJAR.

Nearly three-quarters of adults tune into the radio every week

Radio continues to be popular in Scotland; 74% of people in Q1 2021 said they had listened to the radio in the past week. BBC and commercial services are equally popular, each reaching just under half of all adults. UK-wide stations continue to fare well, with BBC Radio 2 the most popular, according to research carried out in March 2021. The popularity of BBC nations' and regions' services, which includes BBC Radio Scotland, was again underlined this year; almost one in five respondents (17%) had used these services in the past week.

These findings are consistent with figures from previous years provided by RAJAR but which are unavailable this year for the reasons outlined above.

Figure 23: Weekly radio station reach in Scotland: 2021

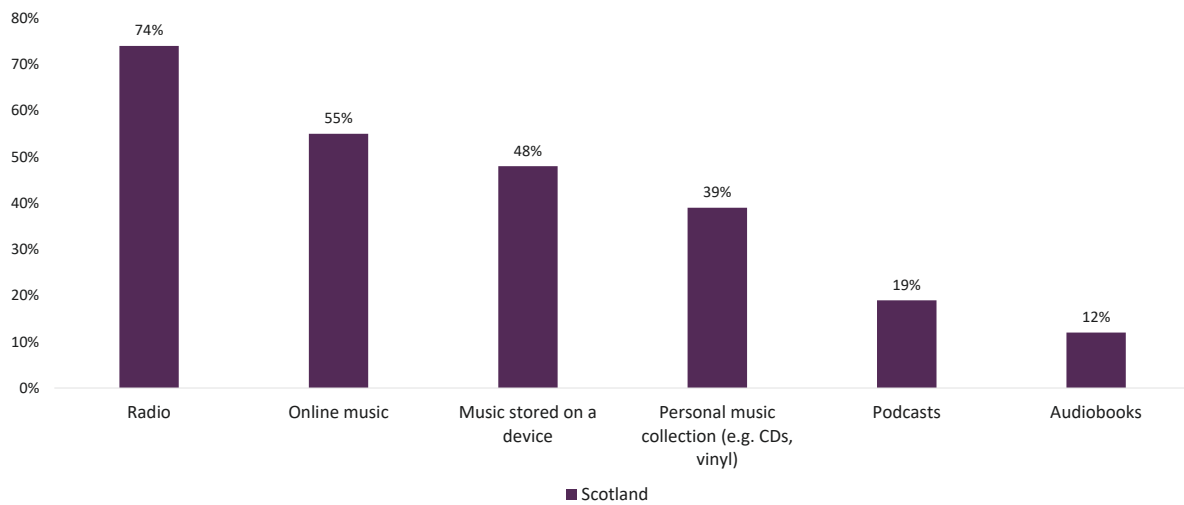


Source: Ofcom Audio Survey 2021. Q2. Which, if any, of these radio stations have you listened to in the last seven days? n=2287. Base: UK online adults 16+, fieldwork 3-7 March 2021.

More than half of adults in Scotland listen to online music services

While three-quarters of adults in Scotland listen to the radio each week, more than half listen to online music services.

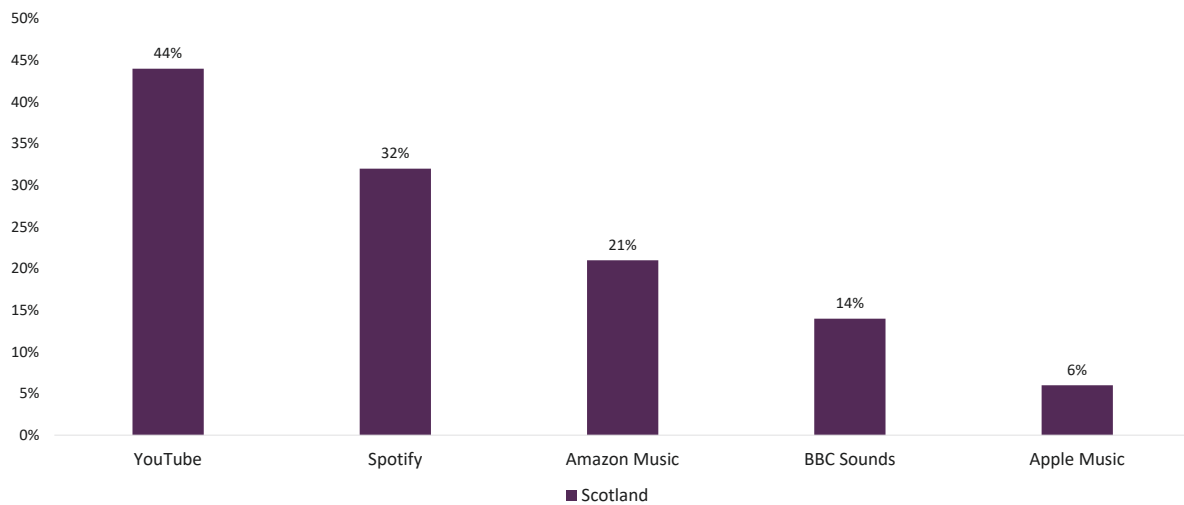
Figure 24: Audio listened to each week: Scotland



Source: Ofcom Audio Survey, March 2021. Q1. How often, if at all, do you do any of the following? Q2. Which, if any, of these radio stations have you listened to in the last seven days?

The most popular platform in Scotland for listening to online audio is YouTube, used by more than two-fifths of adults in Scotland each week.

Figure 25: Platforms used weekly for any audio in Scotland



Source: Ofcom Audio Survey, March 2021

Ofcom awards first small-scale DAB radio multiplex licences for Scotland

Edinburgh, Glasgow, and Inverclyde will now be able to have a range of new radio services, following Ofcom's award of small-scale radio multiplex licences to Edinburgh DAB Ltd, Nation Digital Investments Ltd and UK DAB Networks Ltd.

Small-scale DAB will expand local digital radio coverage and ensure that listeners in the area can tune into a diverse range of radio services on the digital audio broadcasting platform.

It 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 on the digital platform, which accounts for an increasing amount of radio listening.

Nation Digital Investments Ltd was awarded the licence to operate the multiplex for the Glasgow area in March 2021, UK DAB Networks was awarded the licence to operate the multiplex for Inverclyde in March 2021, and Edinburgh DAB Ltd was awarded the licence to operate the multiplex for Edinburgh in May 2021. Successful applicants have 18 months from the date of the award to launch the service.

Following a second round of licensing covering the north west of England and north east Wales, multiplex licences will be advertised towards the end of the year for a further 25 locations across the UK, including Dundee, North Aberdeen and South Aberdeen.

A small-scale radio multiplex service can provide about ten stereo radio stations (and about 20 stereo services if DAB+ is used).

Audio trends

More than half of Scottish homes have smart speakers

A significant amount of digital listening is now done through smart speakers; just over half of homes in Scotland have them (54%). The Amazon Echo is by far the most popular smart speaker, found in 70% of smart-speaker homes.

The most-cited use of smart speakers by users in Scotland was for listening to music via a streaming service such as Spotify, Apple Music or Deezer (67%) followed by live radio (56%).

DAB radios are another important way for people to listen to radio – 39% of households in Scotland have a DAB set in their home, compared to 40% in Wales and 36% in Northern Ireland.²⁰



²⁰ Ofcom Technology Tracker 2021

C-DSP licensing in Scotland

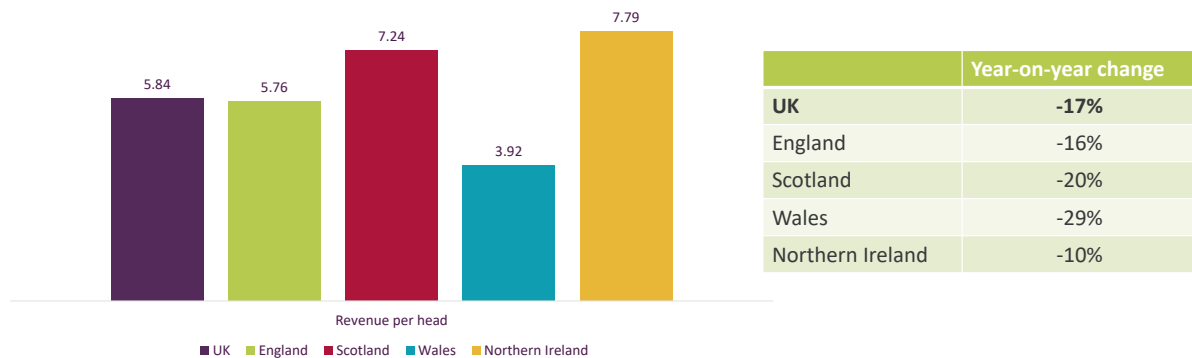
In 2020, Ofcom introduced a new form of community radio station licence for those wishing to broadcast on DAB digital radio. While they are primarily for broadcast via small-scale radio multiplex services, they also allow for broadcast on local radio multiplex services. Licence holders could be existing analogue community radio services wishing to make themselves available to local people on DAB digital radio as well as analogue, or brand new services wanting to broadcast on DAB only.

Ofcom has received three applications to date for C-DSP licences which intend to broadcast on the Glasgow small-scale DAB multiplex: Awaz FM, Jambo! Radio and Paisley FM. A small-scale radio multiplex service is also set to launch in Edinburgh, following Ofcom’s award in May this year of a multiplex licence to Edinburgh DAB Limited.

Commercial radio revenue for local stations decreased by 20% in 2020

Local analogue commercial radio stations in Scotland generated £7.24 per head of population in 2020.

Figure 26: Local/commercial radio revenue: 2020



Source: Ofcom/broadcasters. NB: These figures relate solely to relevant turnover reported against analogue licences (local analogue commercial) and include local and national revenues and sponsorship i.e. not only revenues that relates to adverts aimed at the specific nation. YoY figures adjusted for CPI at 2020 prices.