

BBC Competition Assessment: Scotland

Summary of research findings

Produced by: Critical Research

Fieldwork: 4th December 2017 to 31st January 2018

Section 1

Background, objectives, methodology and respondent profile

Background and objectives

The BBC is proposing to launch a new Scottish television channel in Autumn 2018, which is intended to “reflect Scotland, its people and its culture, both to itself and to the wider world”.

In order to assess the potential impact of the proposal on competition, Ofcom required face to face consumer research with a representative sample of Scottish consumers.

The primary objective was to understand the potential impact of the proposed new BBC Scotland channel on consumption of other services providing Scottish content across TV, newspapers and online

Methodology

Sample

- 1,111 adults aged 16+ in Scotland
- Quotas set on region, gender, age, and socio-economic group from Census data

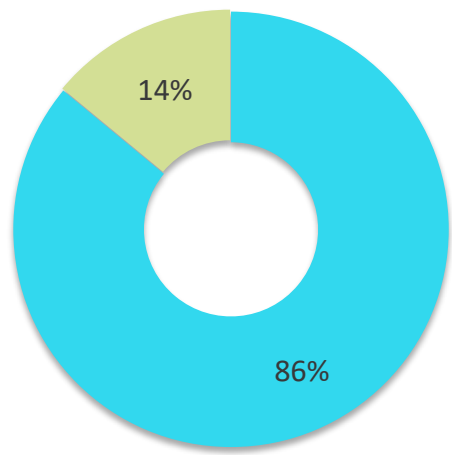
Data collection

- Face-to-face in-home interviews
- Conducted by Critical Research
- Fieldwork from 4th December 2017 to 31st January 2018

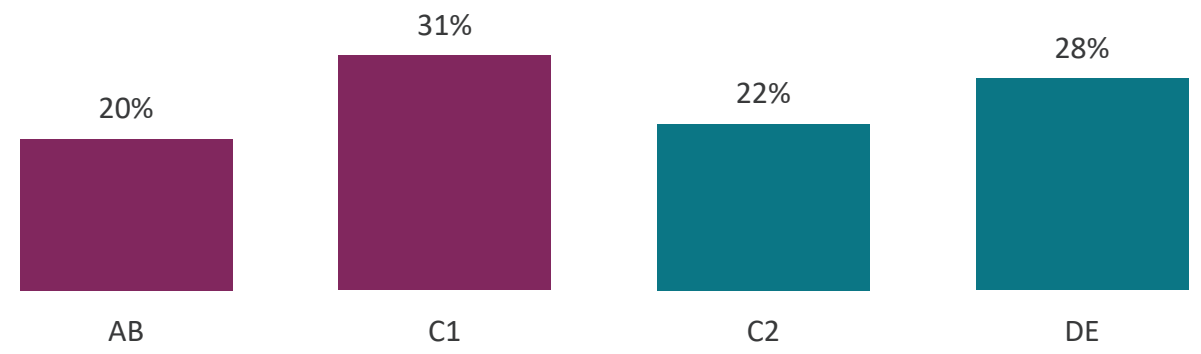
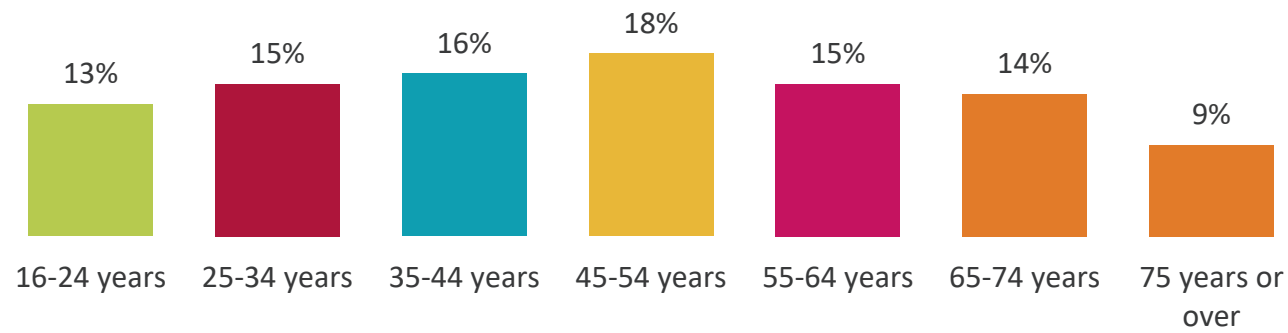
Data reporting

- Weighted to correct over-sampling in Scottish Highlands & Islands
- Data available in pdf tables (aggregated), SPSS and CSV (respondent level)
- Significance testing applied at the 95% confidence level

Respondent profile



Urban Rural



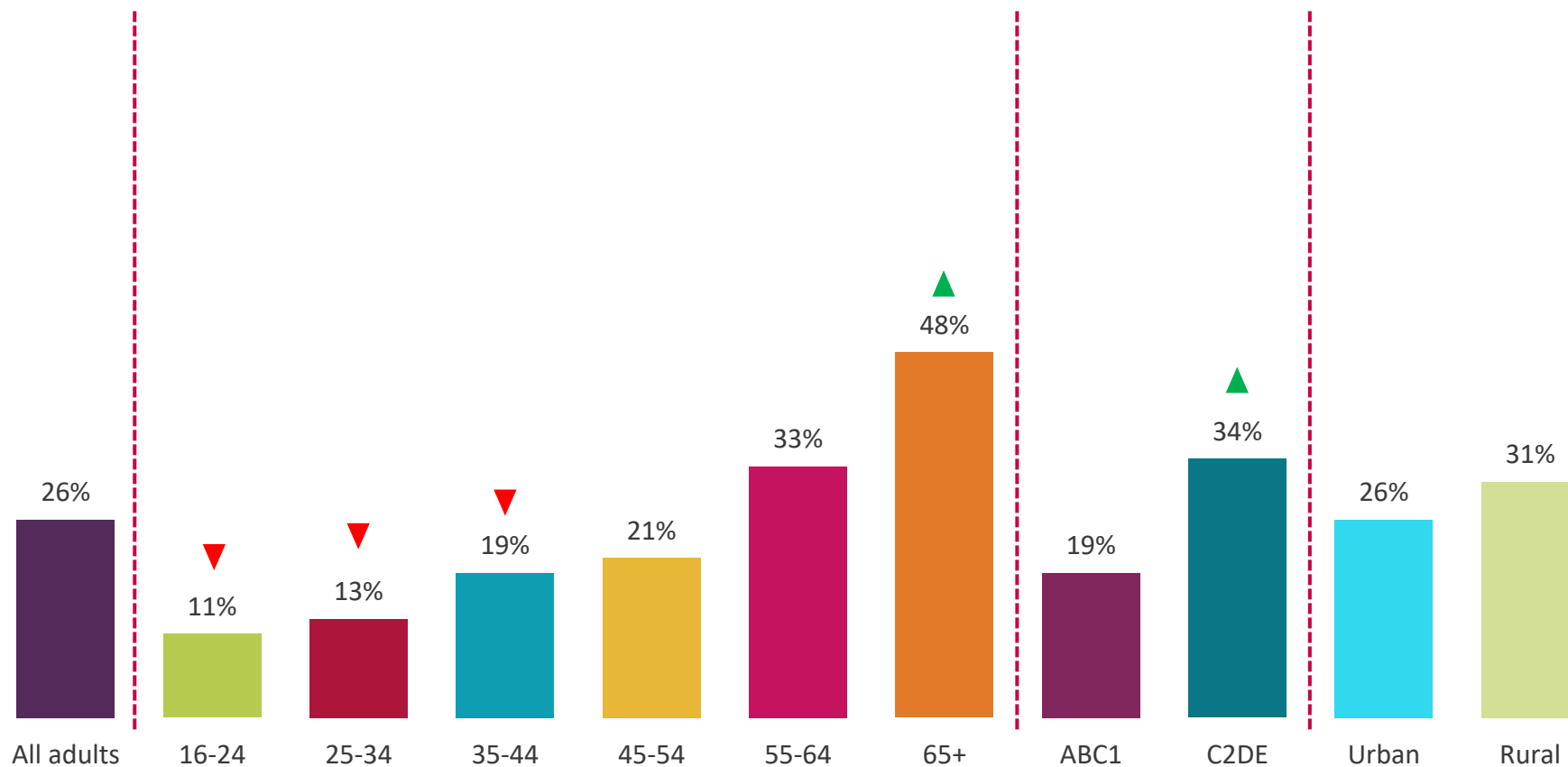
Source: Ofcom BBC Scotland
 S2/S3: What is your age? / What is the occupation of the main wage earner in your household?
 Base: All adults aged 16+ (n=1,111)

Section 2

Existing TV viewing and media consumption

Heavy TV viewers are more likely to be older and in C2DE households (96% of all adults in Scotland ever watch TV)

Incidence of Heavy TV users (defined as 5+ hours per day)



Source: Ofcom BBC Scotland

A4: On a day when you watch TV, for about how many hours do you view on average?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

Definitions used – TV viewing and media consumption

ANY BBC

- BBC One, BBC Two, BBC Three, BBC Four, BBC News channel, BBC ALBA, BBC iPlayer

ANY STV/ ITV*

- STV/ ITV*, STV 2, STV Player, ITV Hub*

ANY CATCH-UP

- BBC iPlayer, STV Player, ITV Hub, All 4, My 5

ANY ON-DEMAND/ STREAMING

- Netflix, Amazon Prime Video

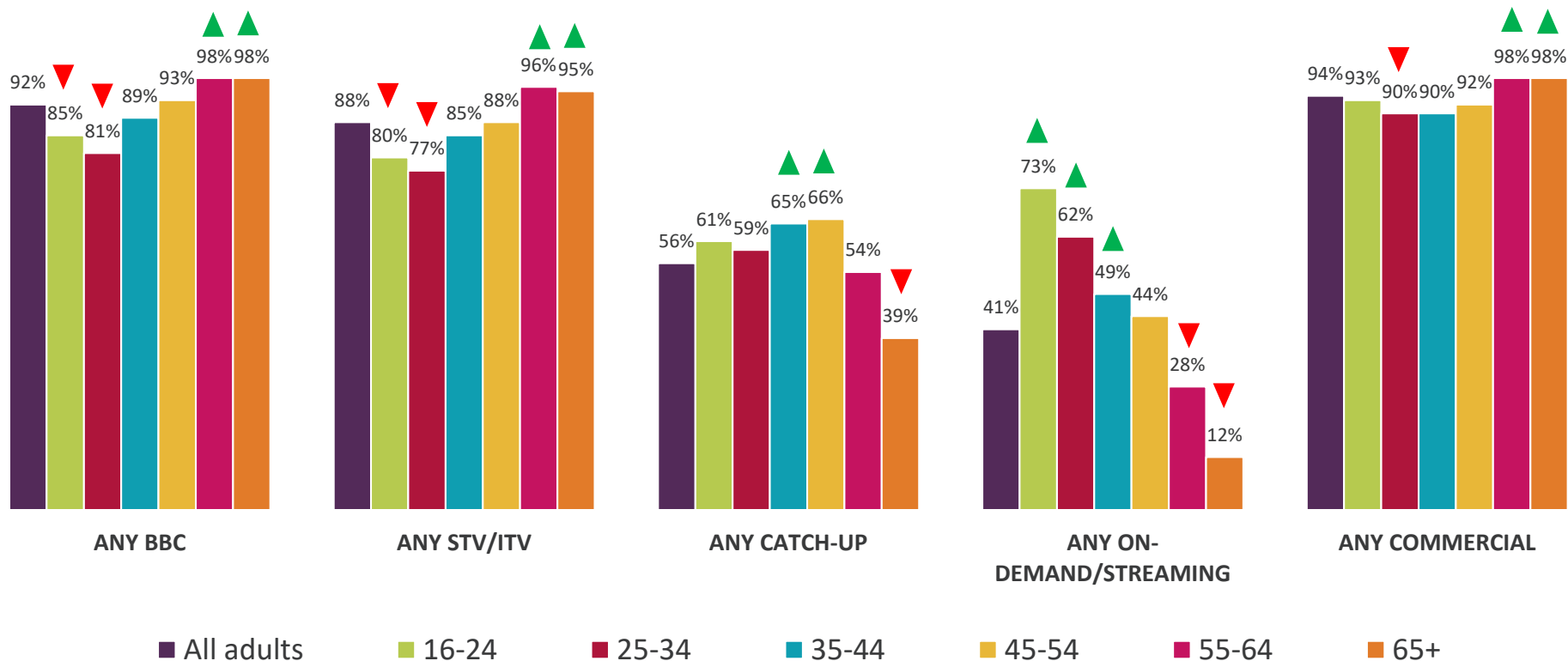
ANY COMMERCIAL

- STV/ ITV*, STV 2, STV Player, ITV Hub*, Channel 4, All 4, Channel 5, My 5, Sky channels, Netflix, Amazon Prime Video

*STV is the Channel 3 service in northern and central Scotland. ITV is the Channel 3 service in southern Scotland.

Older adults are more likely to be BBC and STV/ ITV viewers and less likely to watch on-demand/ streaming content

Ever watch TV channels or services - summary



Source: Ofcom BBC Scotland

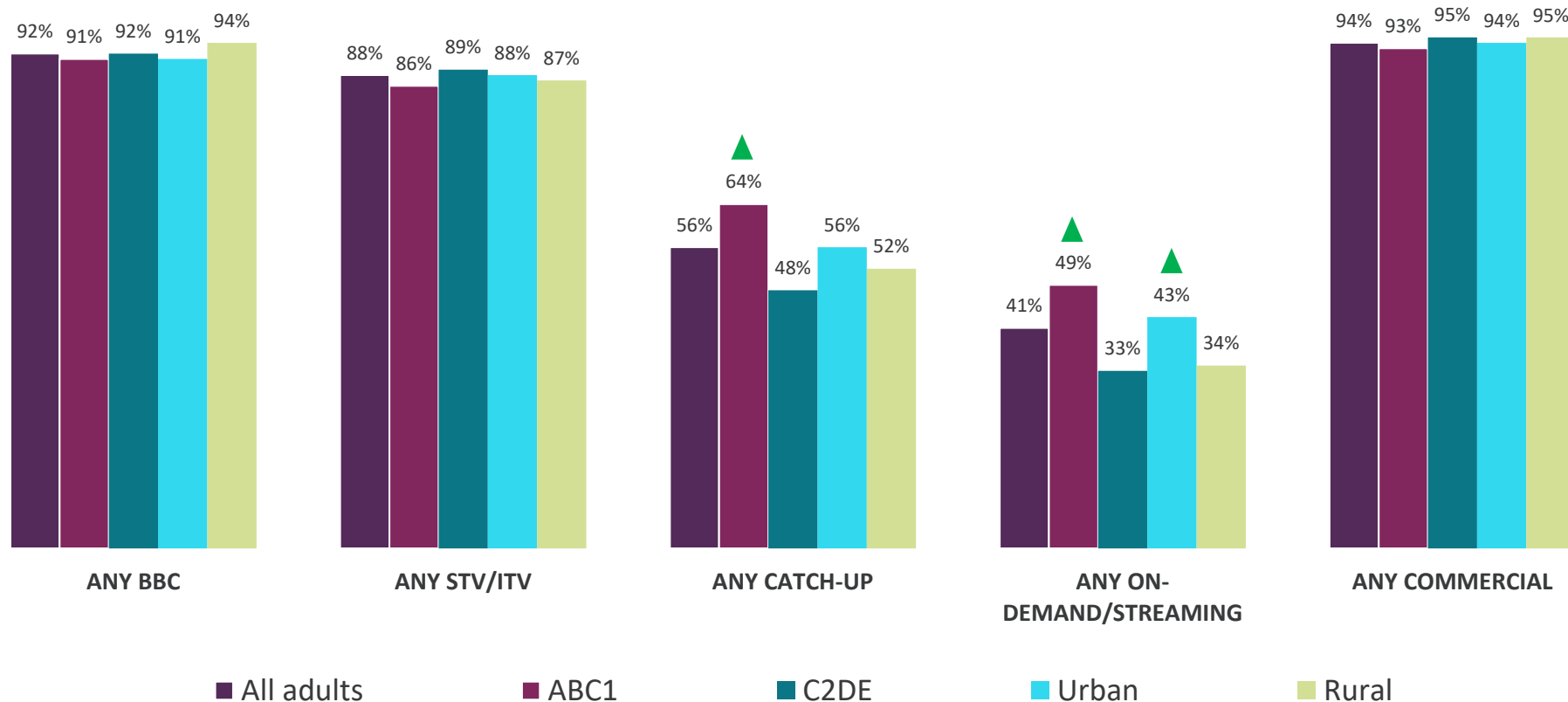
A5: How often, if ever, do you watch any of the following TV channels or services – using a TV set, a computer or tablet, or a mobile phone?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between all adults (Age)

Few differences in viewing by SEG* and location

Ever watch TV channels or services - summary



Source: Ofcom BBC Scotland

A5: How often, if ever, do you watch any of the following TV channels or services – using a TV set, a computer or tablet, or a mobile phone?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between socio-economic groupings (SEG) or locations (Urban/Rural)

*Socio Economic Group: a measure of social grade based primarily on occupation.

Section 3

BBC Scotland – consumption, impact and substitution

Introduction to the new BBC service

- I would now like you to listen to a description of a new TV channel for Scotland.
- The BBC is considering launching a new TV channel next year specifically for audiences in Scotland.
- The new channel would be on-air from 7pm to midnight every day and would show a mix of different types of programmes aimed at audiences in Scotland - including news, current affairs, documentaries, entertainment, lifestyle, Scottish sport, drama, music and comedy.
- Approximately 50% of its programmes would be new, the rest would be repeats of programmes previously shown on BBC channels.
- There would be an hour long news programme on Monday to Friday at 9pm covering Scottish, UK and international stories from a Scottish perspective, with shorter news bulletins at weekends

What could be on the new channel?

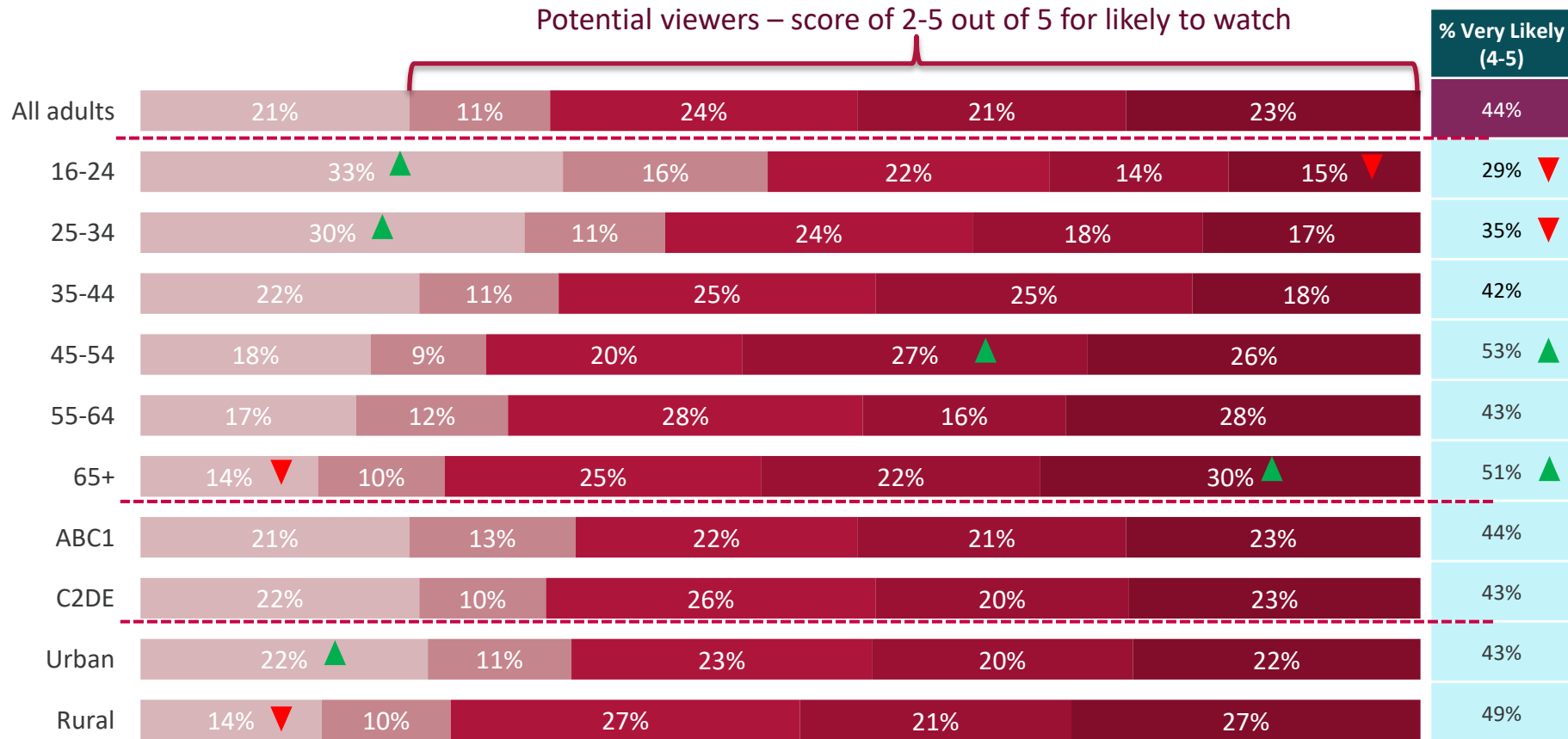
It would have programmes which are relevant to Scottish audiences. Nothing is decided so here is an indicative schedule, showing the **types of content** which the channel is likely to have on 2 typical mid-week evenings. 50% of the schedule will be new programmes and 50% will be repeats. Repeats may include another chance to see programmes shown on other BBC channels.

Example A	Weekday schedule (example)	Example B	Weekday schedule (example)
7pm - 7.05pm	News Update & Welcome	7pm - 7.05pm	News Update & Welcome
7.05pm - 8pm	Quiz/ Family viewing	7.05pm - 9pm	Live Scottish sport Live Scottish sporting events such as shinty, hurling and bowls
8pm - 9pm	Factual (focus on people and lifestyles)/ Drama	9pm - 10pm	9pm News programme Scottish, UK-wide and international news from a Scottish perspective
9pm - 10pm	9pm News programme Scottish, UK-wide and international news from a Scottish perspective	10pm-11pm	Comedy/ Drama/ Factual
10pm - 11pm	Comedy/ Drama / Factual/ Arts/ Current Affairs or Live Scottish Sport Live Scottish sporting events such as shinty, hurling and bowls	11pm- midnight	Factual/ Comedy
11pm - midnight	Music/ Comedy		

Eight in ten adults in Scotland say they would be at all likely to watch the new BBC Scotland channel – higher for older and rural adults

Likelihood of watching the new BBC Scotland channel

Potential viewers – score of 2-5 out of 5 for likely to watch



■ 1 - I would definitely not watch the new BBC Scotland channel ■ 2 ■ 3 ■ 4 ■ 5 - I would definitely watch the new BBC Scotland channel

Source: Ofcom BBC Scotland

B1: On a scale of one to five, how likely do you think you would be to watch the new BBC Scotland channel?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

Definitions used – Consumers of the new channel

All Scottish adults

- Key charts are based on the full sample, representative of all Scottish adults aged 16+. This shows the incidence of responses across the whole adult population in Scotland.

Potential consumers

- Some charts are based on ‘potential consumers’ of either the proposed new channel, or the proposed 9pm news programme. This excludes those who said they would definitely not watch the new channel, for whom some of the questions in the survey were therefore not relevant.

Definitions used – Types of news consumers

At Least Daily news consumers

- Q. How often, if ever, do you read, watch, listen to or follow the news nowadays? This could be on TV, in newspapers, on the radio or online.
- A. Once a day or more

Non-news consumers

- Q. How often, if ever, do you read, watch, listen to or follow the news nowadays? This could be on TV, in newspapers, on the radio or online.
- A. Never – I do not follow the news

STV/ ITV news consumers

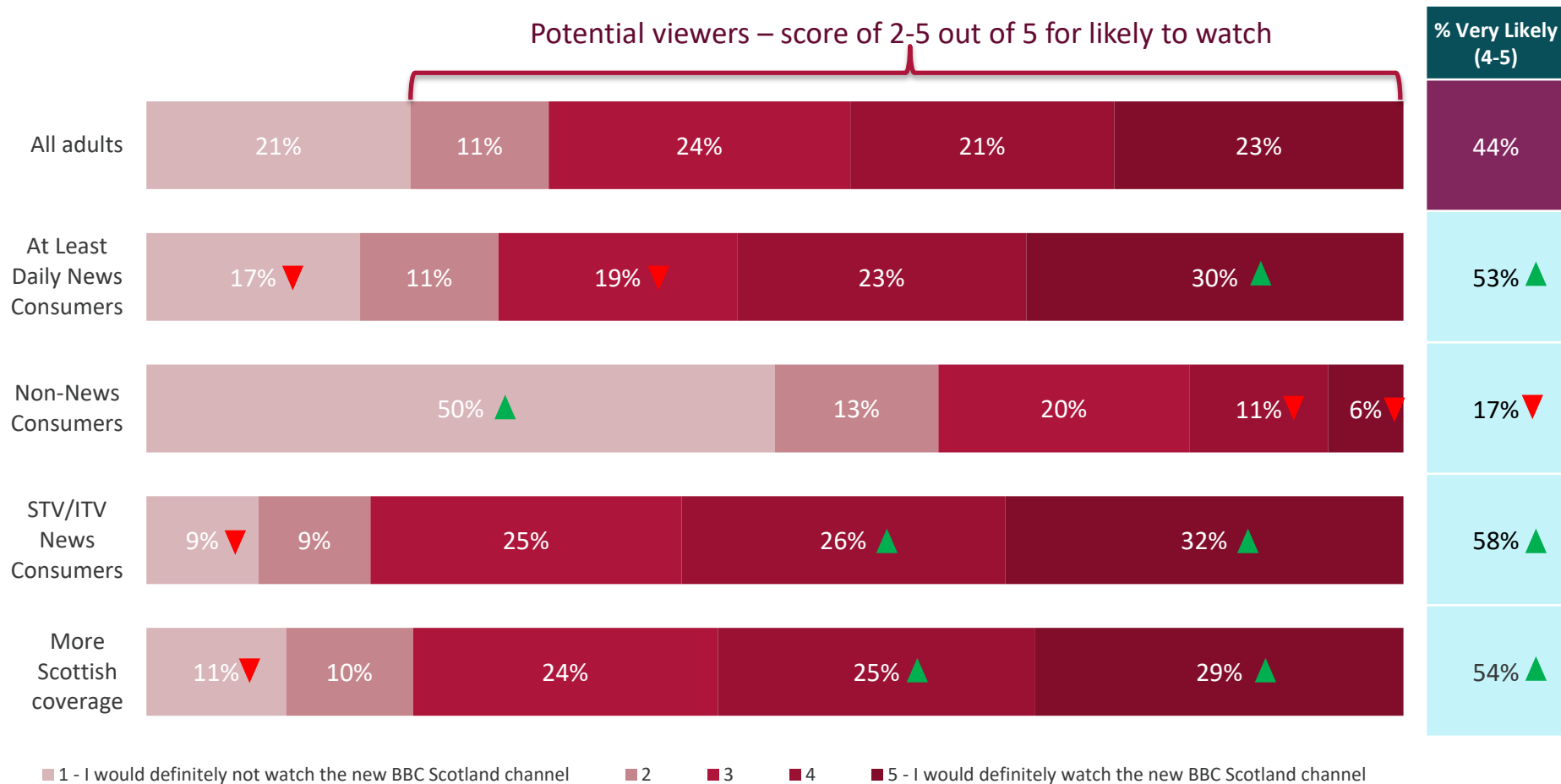
- Q. How often, if ever, do you watch any of the weekday news programmes available on STV, STV2 or ITV?
- A. Every weekday or Most weekdays

More Scottish coverage

- Agree – “I think Scottish issues should be given more attention in the news” OR
- Disagree – “I have enough access to news about Scotland” OR
- Agree – “I would like more coverage of UK and international news and events from a Scottish point of view”

Higher likelihood of watching among heavy news consumers, STV/ITV news consumers & those with an interest in more Scottish coverage

Likelihood of watching the new BBC Scotland channel



Source: Ofcom BBC Scotland

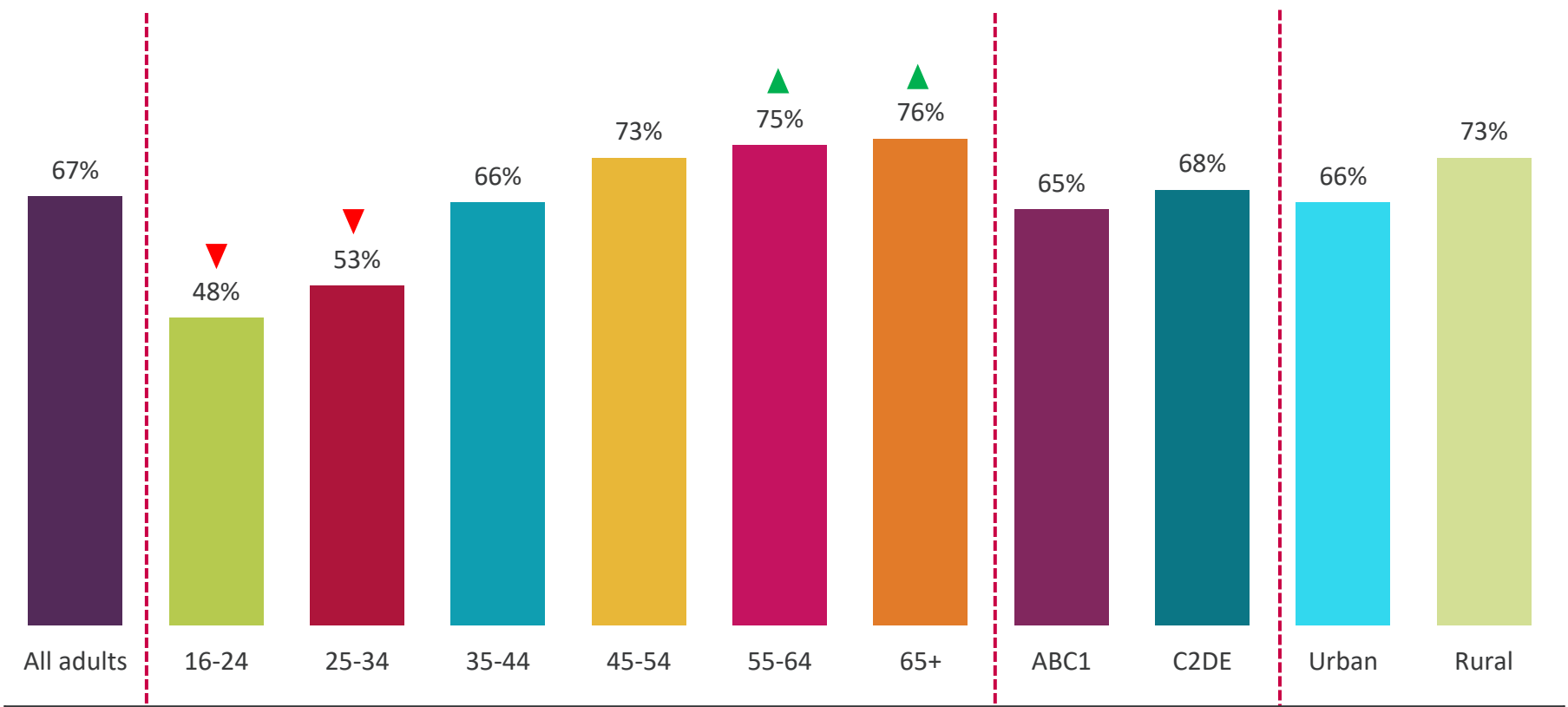
B1: On a scale of one to five, how likely do you think you would be to watch the new BBC Scotland channel?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between sub-groups shown and all adults

Two-thirds of all adults in Scotland say they would watch at least once a week – higher for older adults

% of adults in Scotland who say they would watch at least once a week



% of adults who say they would watch at least once a week, excluding those who say they definitely would not watch (n=878)										
85%	*	75% ▼	85%	89%	90%	89%	83%	87% ▲	85%	85%

Source: Ofcom BBC Scotland

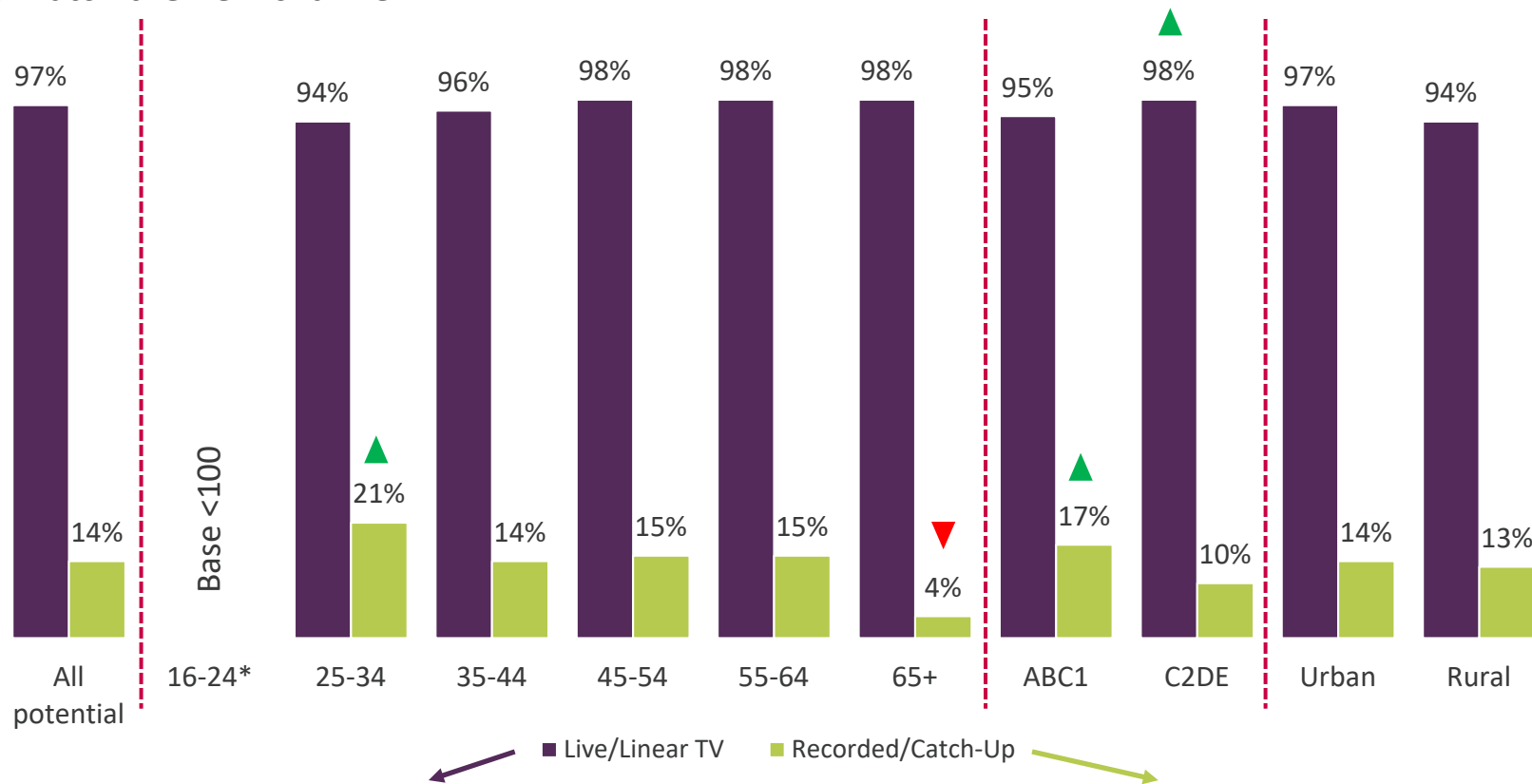
B2: How often do you think you would watch the new BBC Scotland channel?

Base: All adults aged 16+ (n=1,111), All potential viewers of the BBC Scotland channel (n=878) *Base for 16-24s below 100

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

Most people expect to watch the new channel through live/ linear viewing

How potential viewers of BBC Scotland (all excluding those who said they definitely would not watch) would watch the new channel



Watch live/ at the time of broadcast through my television service
 Watch live via the BBC iPlayer

Watch later, recorded through my set-top-box/ TV recorder
 Watch later, via the BBC iPlayer catch-up service

Source: Ofcom BBC Scotland

B3: And how do you think you would watch the new BBC Scotland channel?

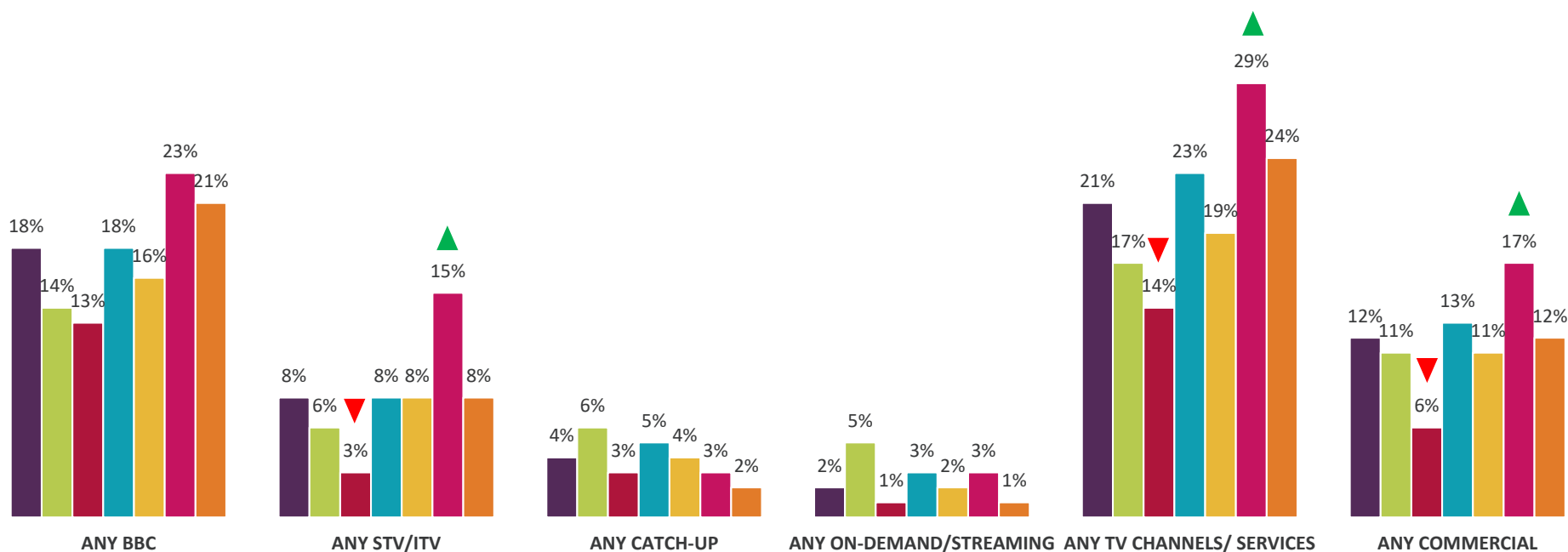
Base: All adults aged 16+ who would potentially watch the BBC Scotland channel at B1 (coded 2-5 at B1) (n=878) *Base for 16-24s below 100

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

Two in ten (21%) of all adults in Scotland say any TV channels or services would be watched less – biggest impact for BBC & among 55-64s

Incidence of watching TV channels/ services less if BBC Scotland launched

■ All adults ■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64 ■ 65+



Incidence of watching TV channels/ services less if BBC Scotland launched among potential viewers – score of 2-5 out of 5 for likely to watch

22%

10%

5%

3%

27%

15%

Source: Ofcom BBC Scotland

C1: Do you think you would watch any of these channels or services less if the new BBC channel launched?

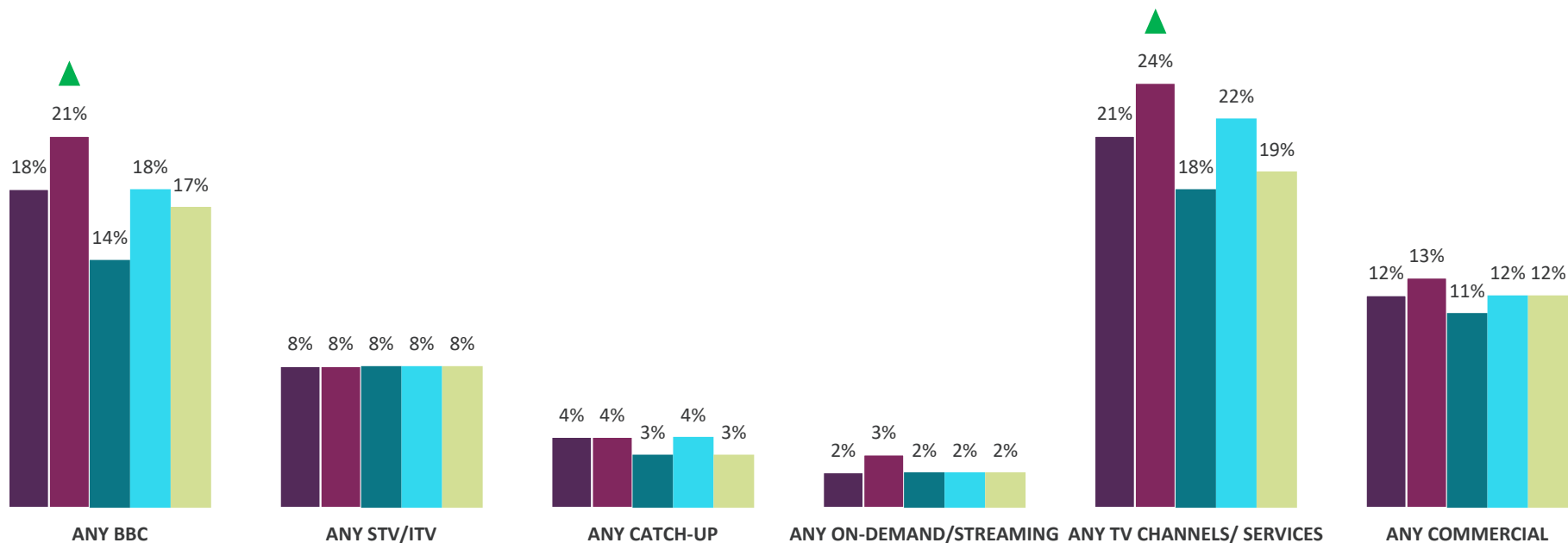
Base: All adults aged 16+ (n=1,111), All adults aged 16+ who would potentially watch the BBC Scotland channel (coded 2-5 at B1) (n=878)

Arrows show any significant difference (95% level) between all adults (Age)

Substitution for TV channels/ services and any BBC service is higher among ABC1s, with no difference by location

Incidence of watching TV channels/ services less if BBC Scotland launched

■ All adults ■ ABC1 ■ C2DE ■ Urban ■ Rural



Incidence of watching TV channels/ services less if BBC Scotland launched among potential viewers – score of 2-5 out of 5 for likely to watch

22%

10%

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3%

27%

15%

Source: Ofcom BBC Scotland

C1: Do you think you would watch any of these channels or services less if the new BBC channel launched?

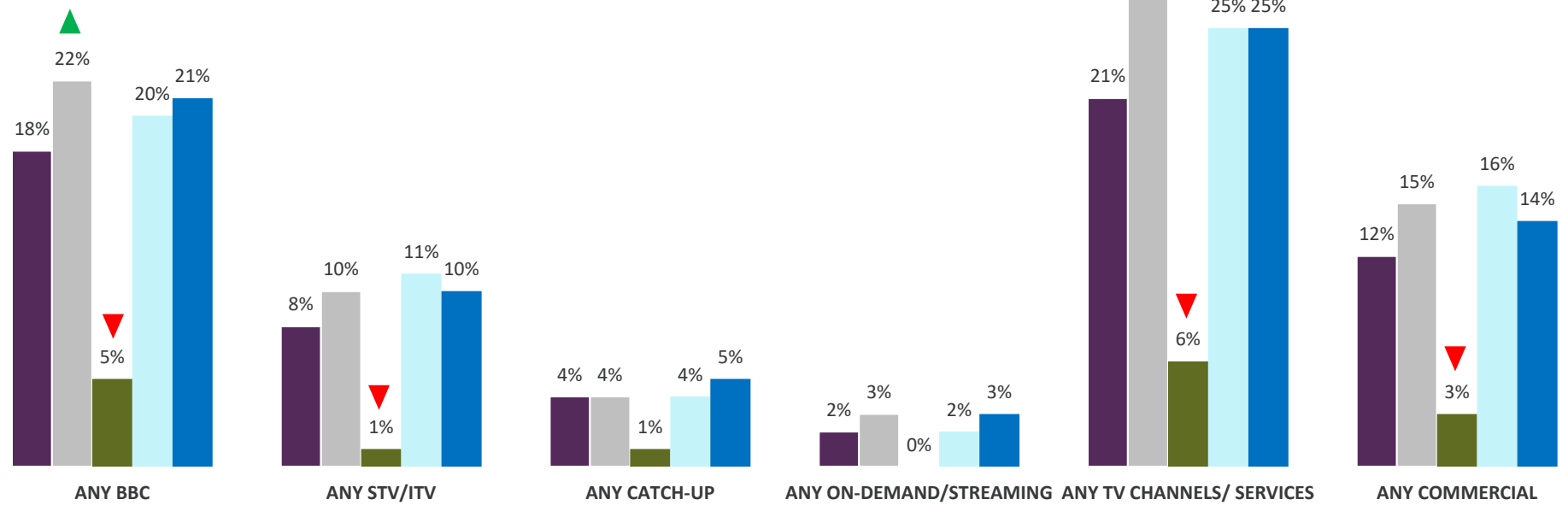
Base: All adults aged 16+ (n=1,111) , All adults aged 16+ who would potentially watch the BBC Scotland channel (coded 2-5 at B1) (n=878)

Arrows show any significant difference (95% level) between socio-economic groupings (SEG) or locations (Urban/Rural)

Substitution for any TV channels/ services and for BBC TV channels/ services is more likely among heavy news consumers (daily)

Incidence of watching TV channels/ services less if BBC Scotland launched

■ All adults
 ■ Heavy News Consumers (Daily)
 ■ Non-News Consumers
■ STV/ITV News Consumers
 ■ More Scottish coverage



Incidence of watching TV channels/ services less if BBC Scotland launched among potential viewers – score of 2-5 out of 5 for likely to watch

22%	10%	5%	3%	27%	15%
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Source: Ofcom BBC Scotland

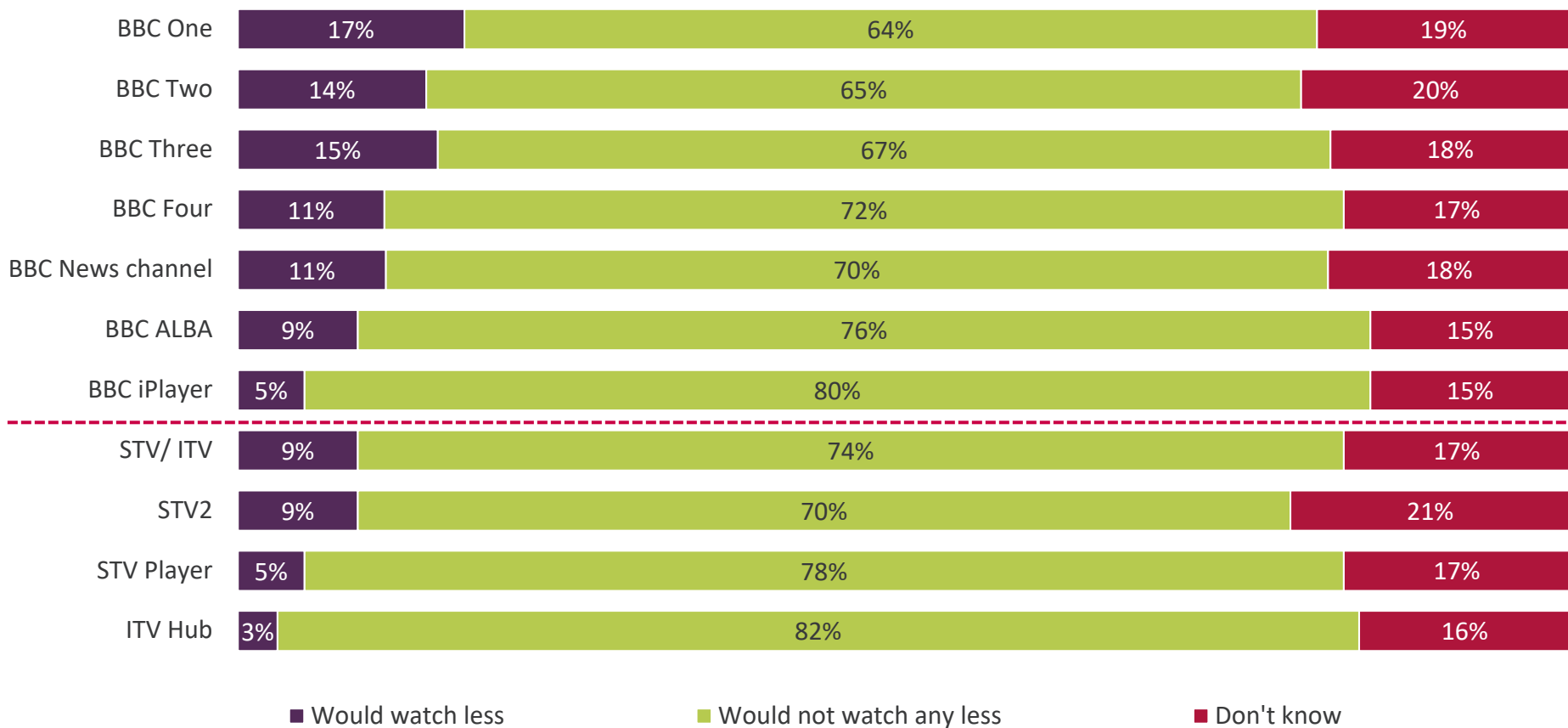
C1: Do you think you would watch any of these channels or services less if the new BBC channel launched?

Base: All adults aged 16+ (n=1,111) , All adults aged 16+ who would potentially watch the BBC Scotland channel (coded 2-5 at B1) (n=878)

Arrows show any significant difference (95% level) between sub-groups shown and all adults

Substitution is more likely to relate to BBC One viewing than other BBC channels/ services. Lower substitution for catch-up services.

Incidence of current TV channel/ service viewers watching less if BBC Scotland launched



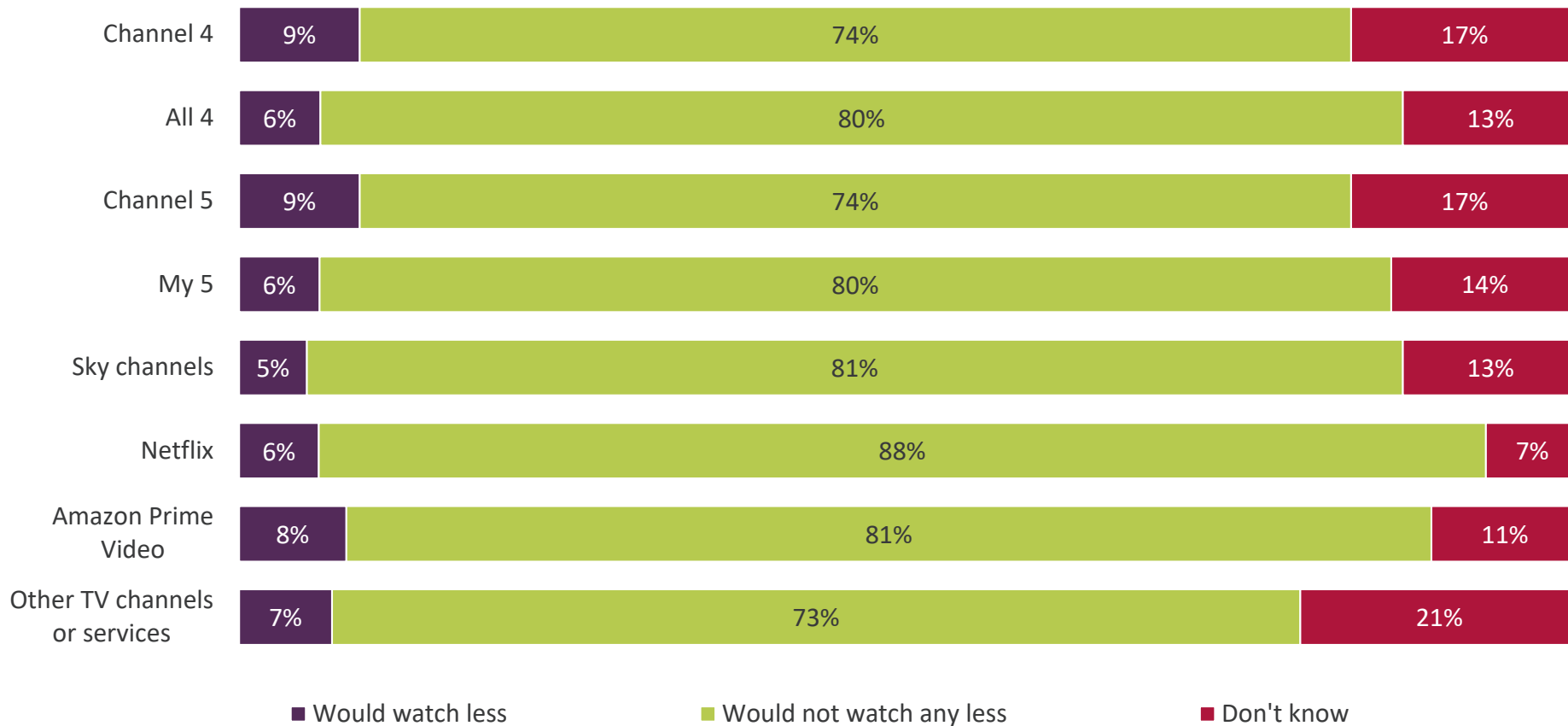
Source: Ofcom BBC Scotland

C1: Do you think you would watch any of these channels or services less if the new BBC channel launched?

Base: All adults aged 16+ who ever watch the TV channel/ service in question and are potential BBC Scotland viewers (BBC One n= 840, BBC Two n=707, BBC Three n=282, BBC Four n=385, BBC News channel n=508, BBC ALBA n=268, BBC iPlayer n=458, STV/ ITV n= 819, STV2 n=367, STV Player n=311, ITV Hub n=245)

Substitution is no higher than one in ten among viewers of non-BBC TV channels and services.

Incidence of current TV channel/ service viewers watching less if BBC Scotland launched



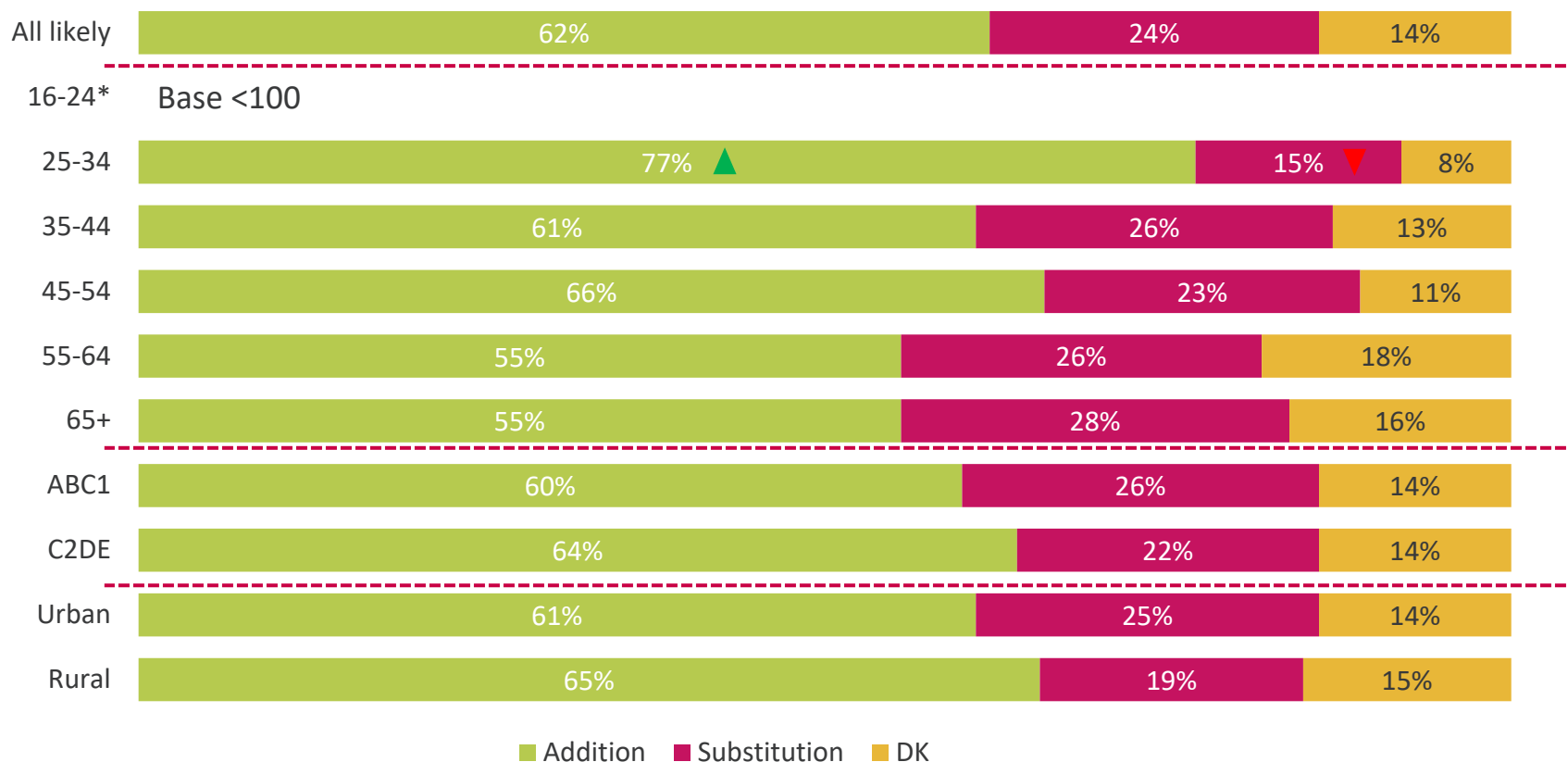
Source: Ofcom BBC Scotland

C1: Do you think you would watch any of these channels or services less if the new BBC channel launched?

Base: All adults aged 16+ who ever watch the TV channel/ service in question and are potential BBC Scotland viewers (Channel 4 n= 754, All 4 n=260, Channel 5 n=655, My 5 n=162, Sky channels n=449, Netflix n=345, Amazon Prime Video n=139, Other TV channels or services n=317)

Among potential viewers, around one quarter think they would watch the new channels instead of existing viewing

Whether potential viewers think they would watch in addition to or instead of their existing viewing



Source: Ofcom BBC Scotland

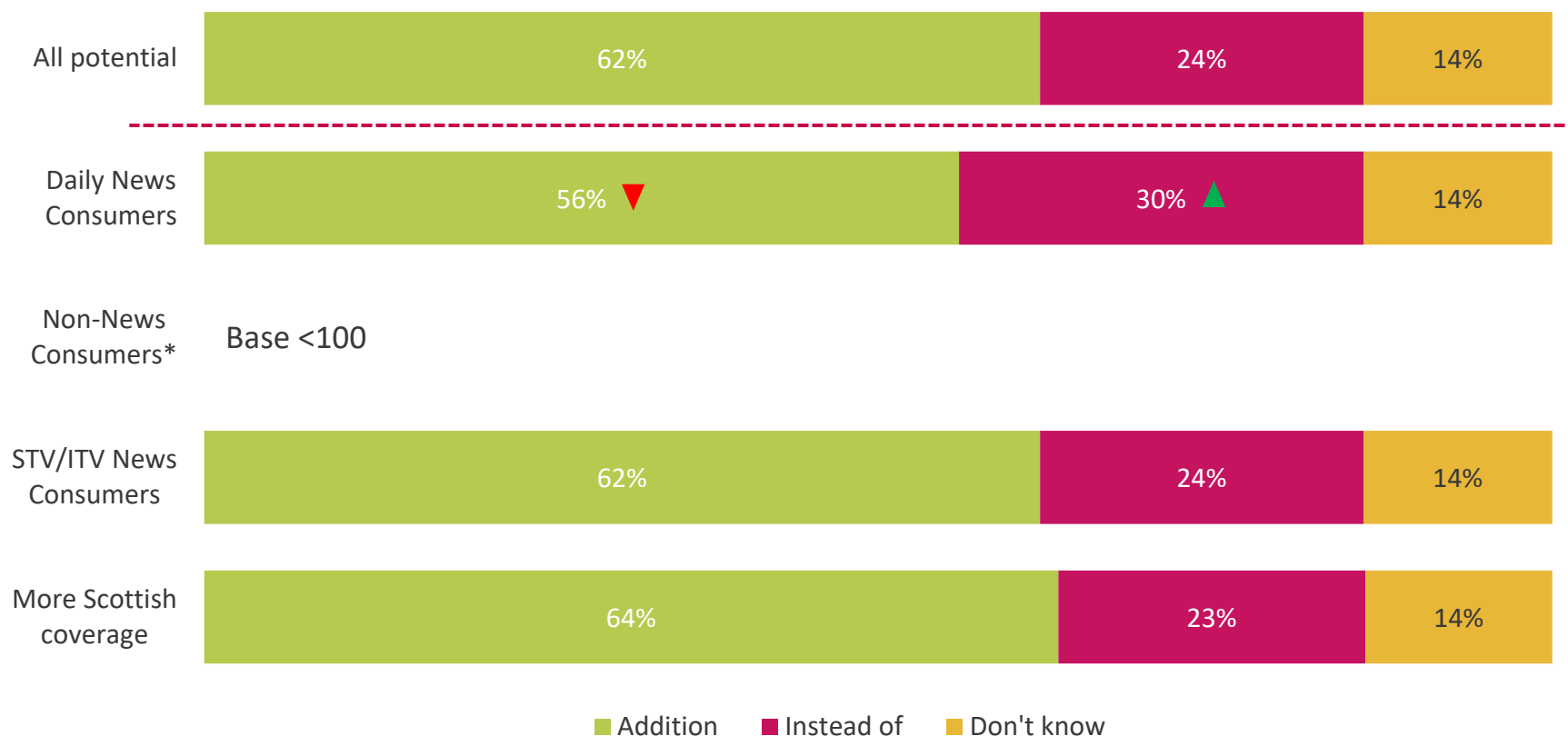
C2: Do you think you would watch BBC Scotland in addition to or instead of your existing television viewing?

Base: All adults aged 16+ who would potentially watch the BBC Scotland channel (coded 2-5 at B1) (n=878) *Base for 16-24s below 100

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

Daily news consumers are more likely than the average to watch BBC Scotland instead of, rather than in addition to, existing viewing.

Whether potential viewers think they would watch in addition to or instead of their existing viewing



Source: Ofcom BBC Scotland

C2: Do you think you would you watch BBC Scotland in addition to or instead of your existing television viewing?

Base: All adults aged 16+ who would potentially watch the BBC Scotland channel (coded 2-5 at B1) (n=878) *Base for non-news consumers below 100

Arrows show any significant difference (95% level) between sub-groups shown and all adults

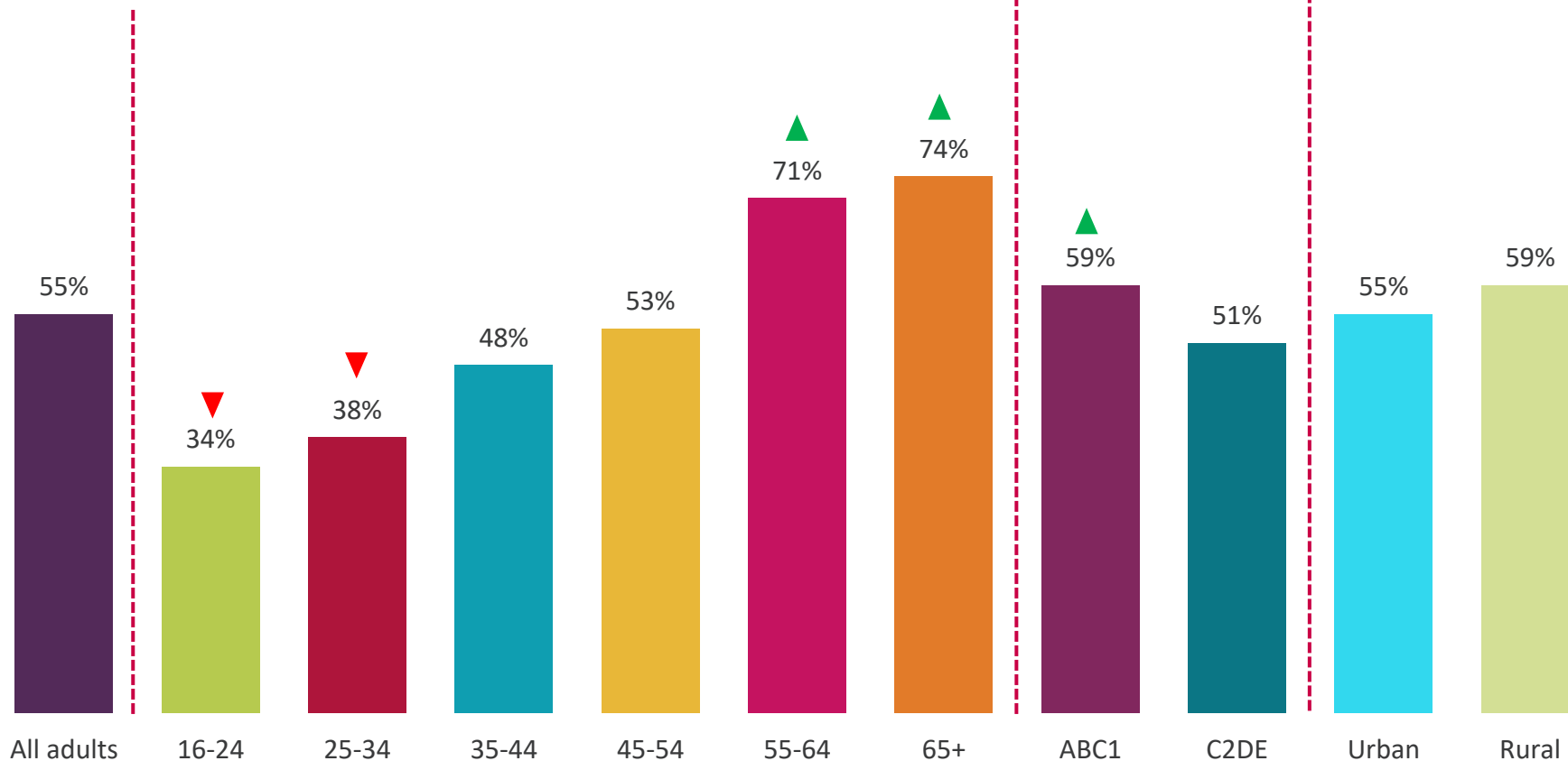
Section 4

News consumption, impact and substitution

Daily consumers of news (once a day or more) are more likely to be older and in ABC1 households

Incidence of at least daily news consumption

Ever consume news: 88%



Source: Ofcom BBC Scotland

D1: How often, if ever, do you read, watch, listen to or follow the news nowadays?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

Definitions used – news consumption

ANY TV

- BBC Channels (BBC 1/2/3/4), STV and ITV Channels (STV/ STV2/ ITV), Channel 4/ Channel 5, BBC News Channel, Other 24-hour rolling news (e.g. Sky News, CNN), Any other TV channels

ANY RADIO

- UK-wide BBC Radio (e.g. BBC Radio 1/2/3/4/5), BBC Radio Scotland or BBC Radio Gàidheal, National Commercial Radio – so radio stations with advertisements (e.g. Classic FM< Capital Scotland, Heart Scotland, talkSPORT), Commercial radio for your local area – so radio stations with advertisements, Any other radio stations

ANY PRINTED NEWSPAPERS

- National newspapers (printed) (e.g. The Scottish Sun, Daily Record, Metro, Scottish Daily Mail, The Times), Newspapers for your local area (printed), Any other printed newspapers

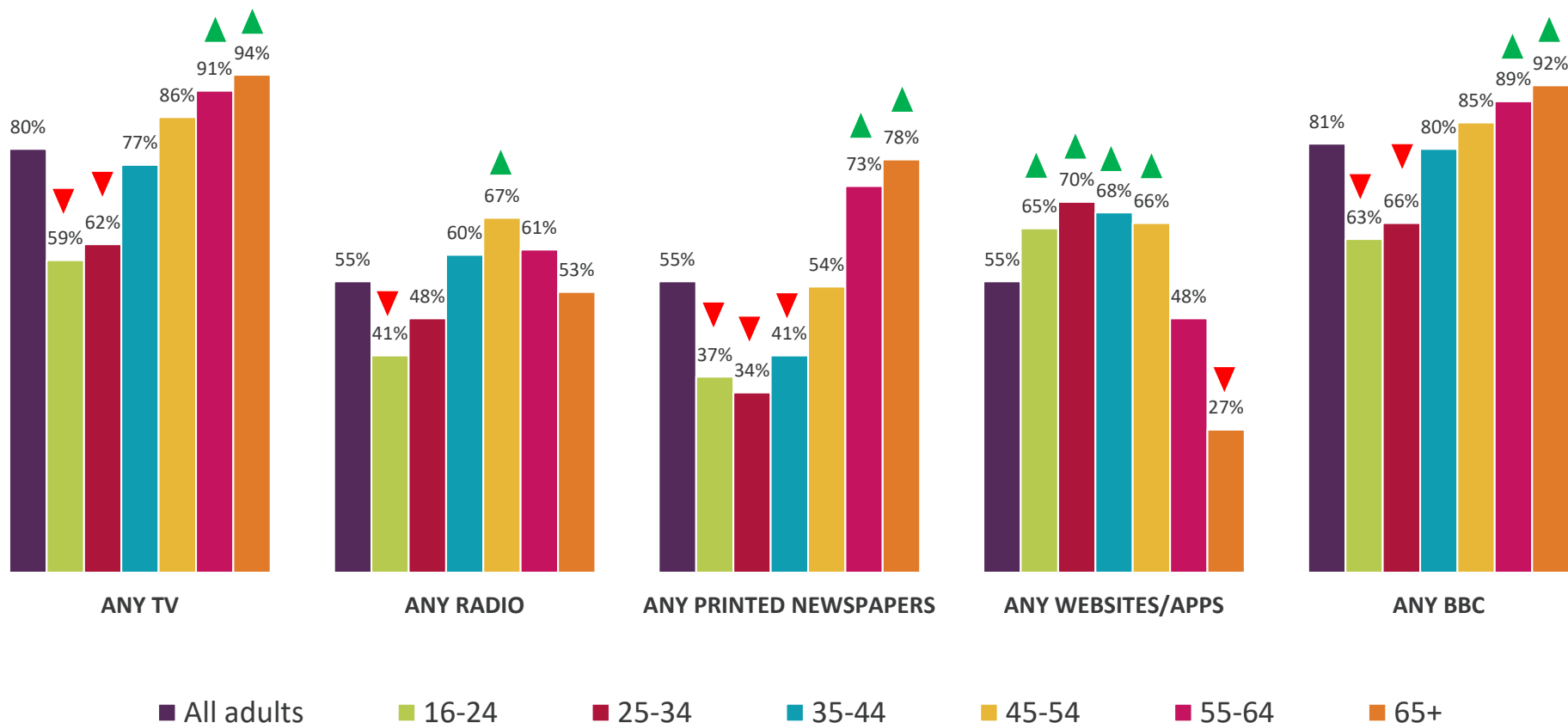
ANY WEBSITES/ APPS

- National newspaper websites or apps, Newspaper websites or apps for your local area, BBC News website or app, Other national news websites or apps (e.g. BuzzFeed, Huffington Post, STV News), Other news websites or apps for your local area, Any other websites or apps, Social media sites or apps (e.g. Facebook, Twitter)

ANY BBC

- BBC Channels (BBC 1/2/3/4), BBC News Channel, UK-wide BBC Radio (e.g. BBC Radio 1/2/3/4/5), BBC Radio Scotland or BBC Radio Gàidheal, BBC News website or app

Older adults are more likely to consume news through TV (including the BBC) and newspapers, while younger adults are more likely to use websites and apps



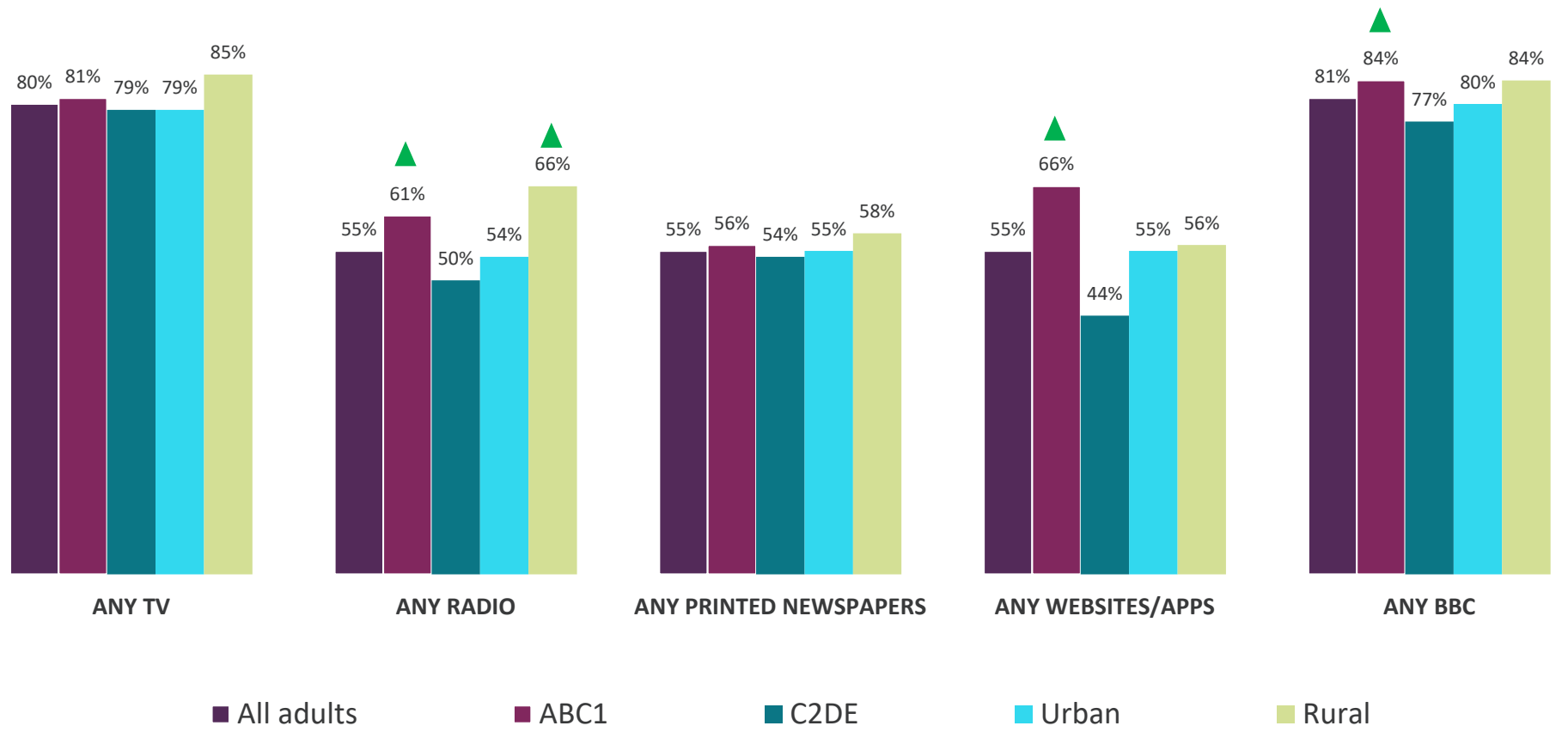
Source: Ofcom BBC Scotland

D2: How often, if ever, do you use any of the following for news?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between all adults (Age)

ABC1 adults are more likely to consume news through radio and sites/ apps (and BBC). Higher use of radio among adults in rural areas.



Source: Ofcom BBC Scotland

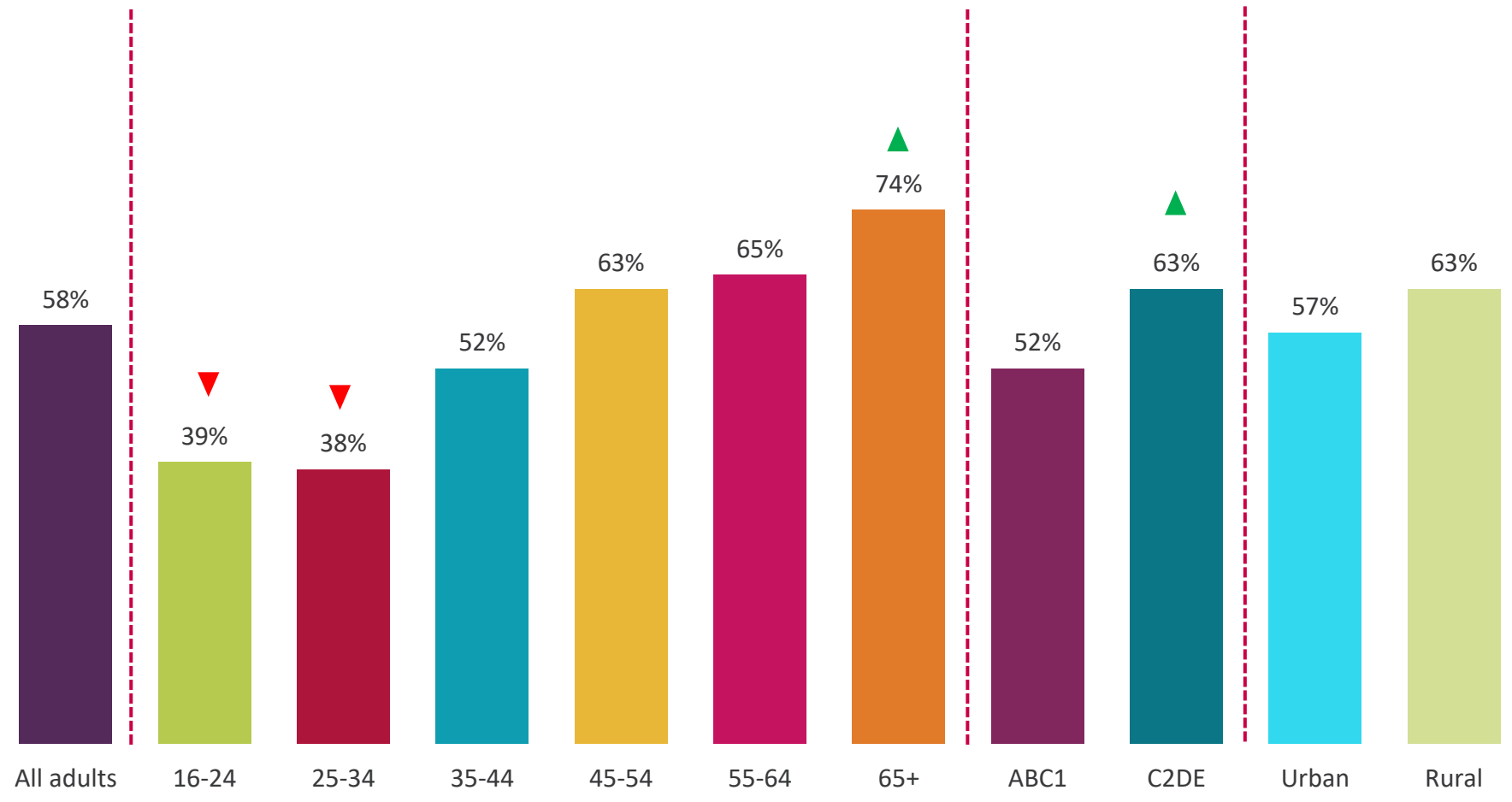
D2: How often, if ever, do you use any of the following for news?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between socio-economic groupings (SEG) or locations (Urban/Rural)

Six in ten adults in Scotland watch STV/ ITV news programmes at least once a week – higher for older and C2DE adults

Watch any weekday news programmes on STV, STV2 or ITV at least once a week



Source: Ofcom BBC Scotland

D3: And how often, if ever, do you watch any of the weekday news programmes available on STV, STV2 or ITV?

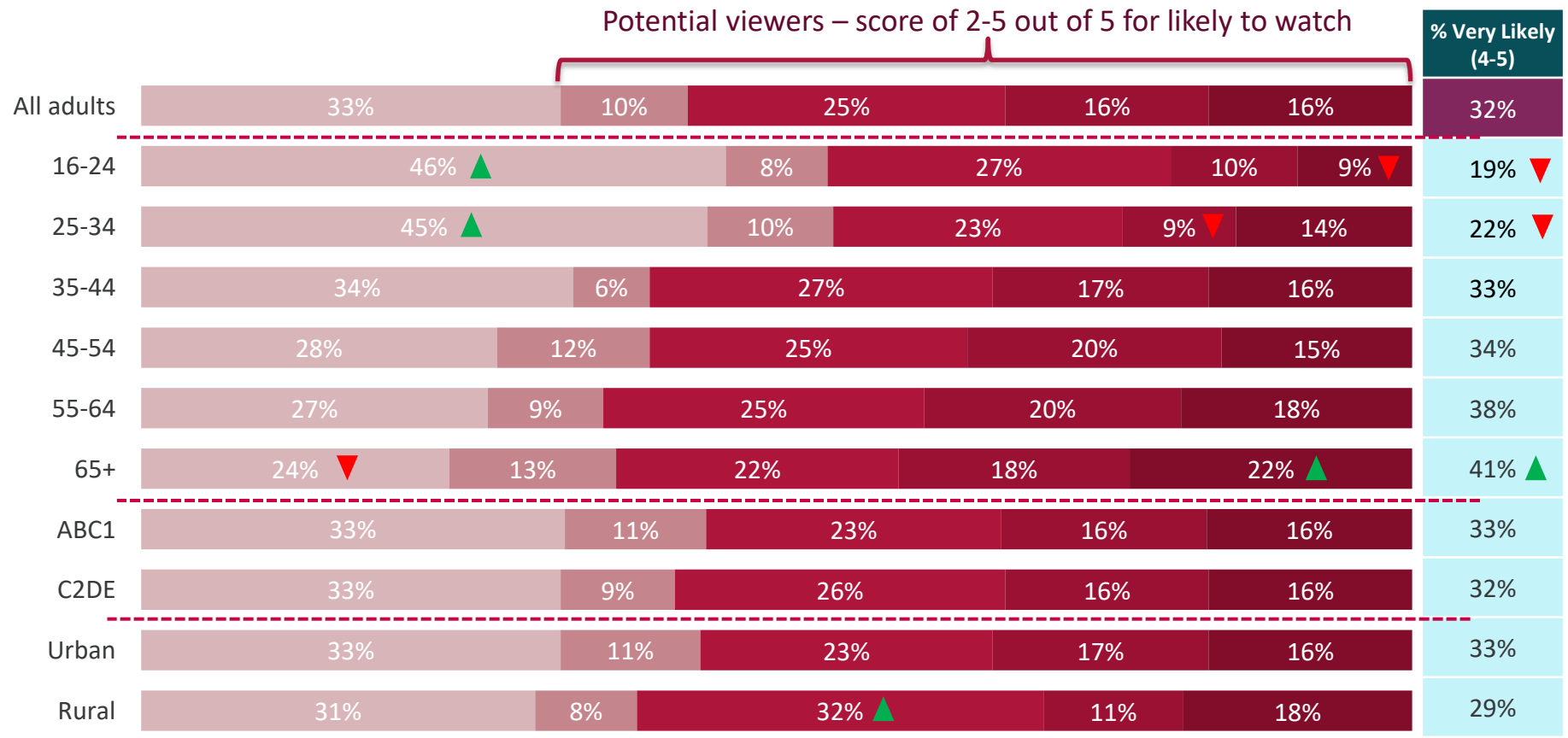
Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

A third of adults in Scotland say they would be very likely to watch the 9pm news programme; a third say they definitely would not watch



Likelihood of watching the 9pm news programme on the new BBC Scotland channel



■ 1 - I would definitely not watch the 9pm news on the BBC Scotland channel ■ 2 ■ 3 ■ 4 ■ 5 - I would definitely watch the 9pm news on the BBC Scotland channel

Source: Ofcom BBC Scotland

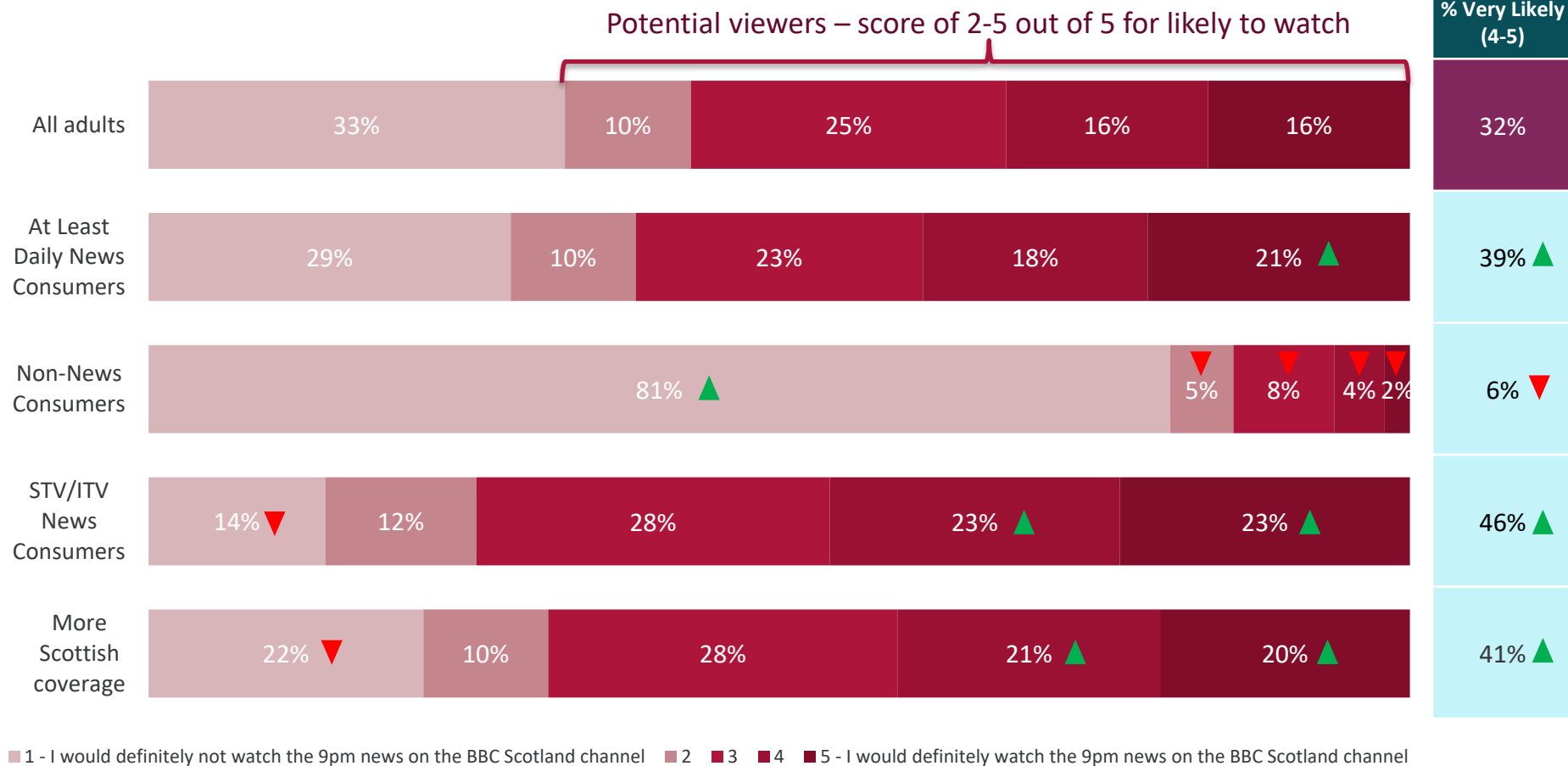
D4: On a scale of one to five how likely do you think you would be to watch the 9pm news programme on the new BBC Scotland channel?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

Higher appeal among at least daily news consumers, STV/ITV news consumers and those with an interest in more Scottish coverage

Likelihood of watching the 9pm news programme on the new BBC Scotland channel



Source: Ofcom BBC Scotland

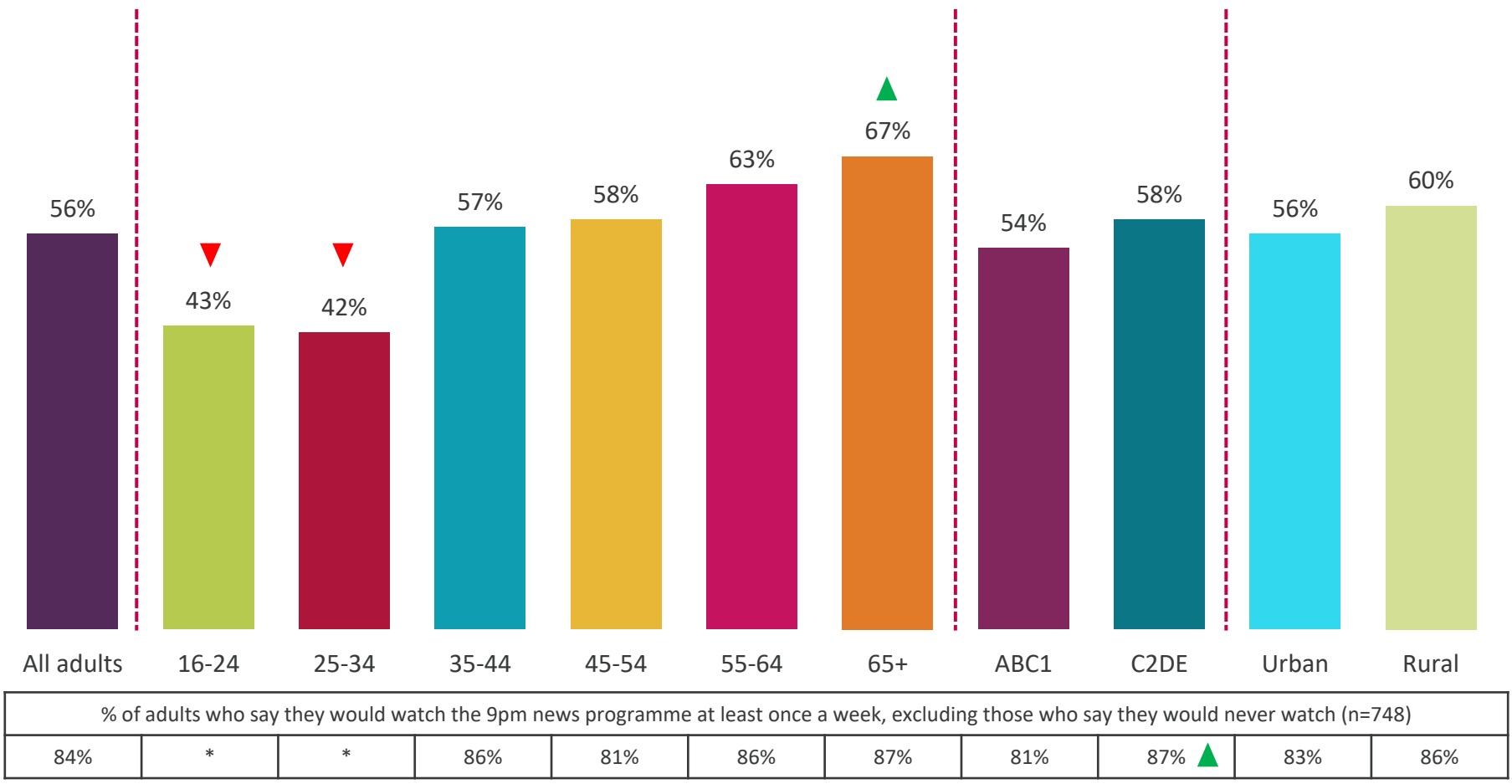
D4: On a scale of one to five how likely do you think you would be to watch the 9pm news programme on the new BBC Scotland channel?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between sub-groups shown and all adults

Over half of all adults in Scotland say they would watch the 9pm news at least once a week – higher for older adults

% of adults in Scotland who say they would the 9pm news programme watch at least once a week



Source: Ofcom BBC Scotland

D5: How often do you think you would watch the 9pm weekday news on the new BBC Scotland channel?

Base: All adults aged 16+ (n=1,111), All adults aged 16+ who would potentially watch the 9pm news programme on the BBC Scotland channel (coded 2-5 at D4) (n=748)

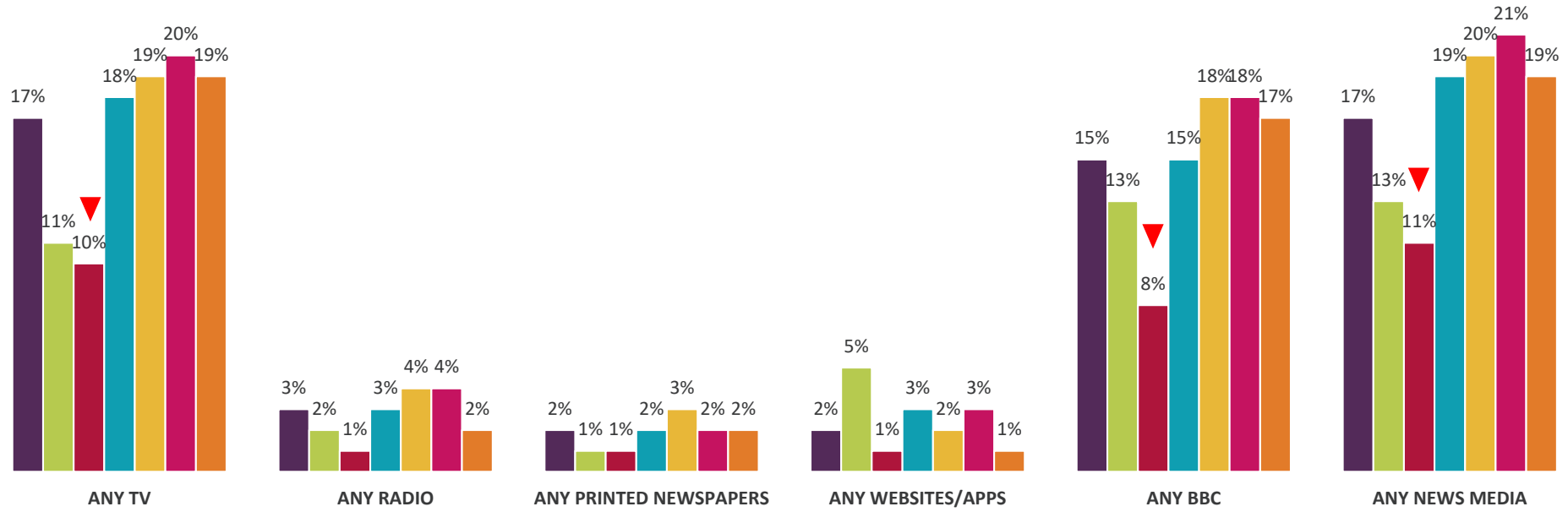
Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)



Two in ten (17%) Scottish adults say they would consume other TV news less if the BBC Scotland 9pm news programme was launched. Few anticipated consuming less non-TV news.

Incidence of consuming less news if BBC Scotland launched with 9pm news programme

■ All adults ■ 16-24 ■ 25-34 ■ 35-44 ■ 45-54 ■ 55-64 ■ 65+



Incidence of consuming less news if BBC Scotland launched with 9pm news programme among potential viewers – score of 2-5 out of 5 for likely to watch

25%	4%	3%	3%	22%	26%
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Source: Ofcom BBC Scotland

D6: Do you think you would consume less news as a result on any of the following?

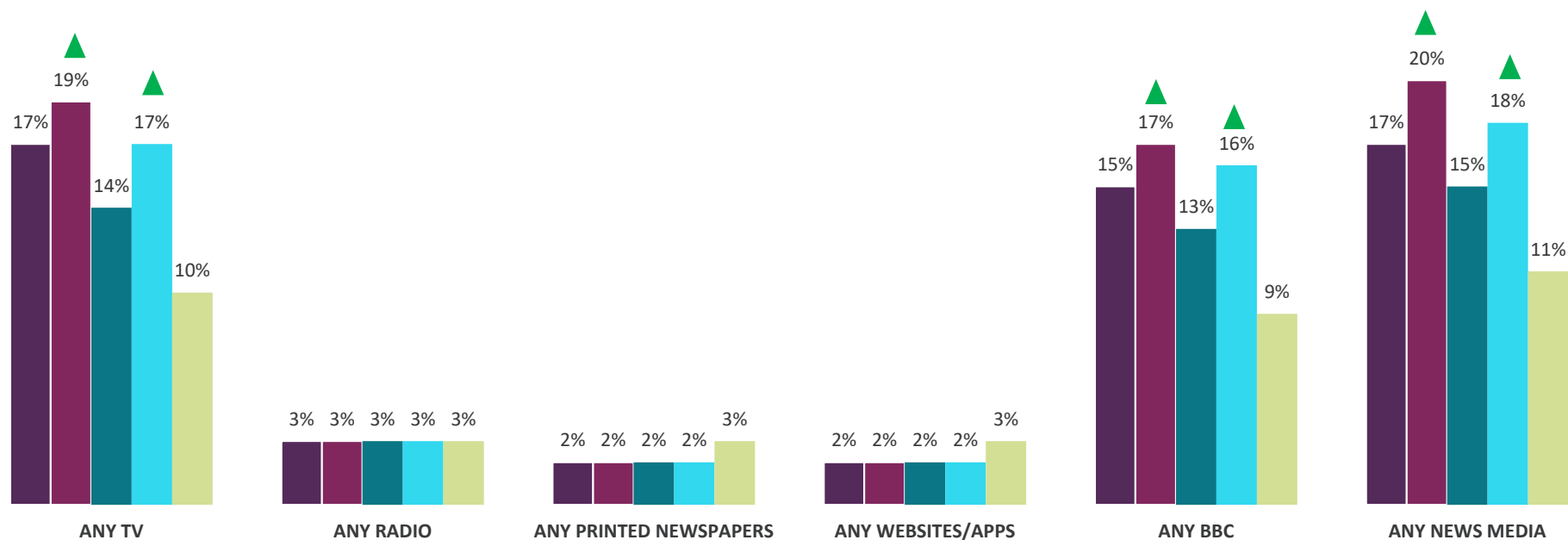
Base: All adults aged 16+ (n=1,111) All adults aged 16+ who would potentially watch the 9pm news programme on the BBC Scotland channel (coded 2-5 at D4) (n=748)

Arrows show any significant difference (95% level) between all adults (Age)

News source substitution is more likely among ABC1 and urban adults in Scotland

Incidence of consuming less news if BBC Scotland launched with 9pm news programme

■ All adults ■ ABC1 ■ C2DE ■ Urban ■ Rural



Incidence of consuming less news if BBC Scotland launched with 9pm news programme among potential viewers – score of 2-5 out of 5 for likely to watch

25%

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3%

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22%

26%

Source: Ofcom BBC Scotland

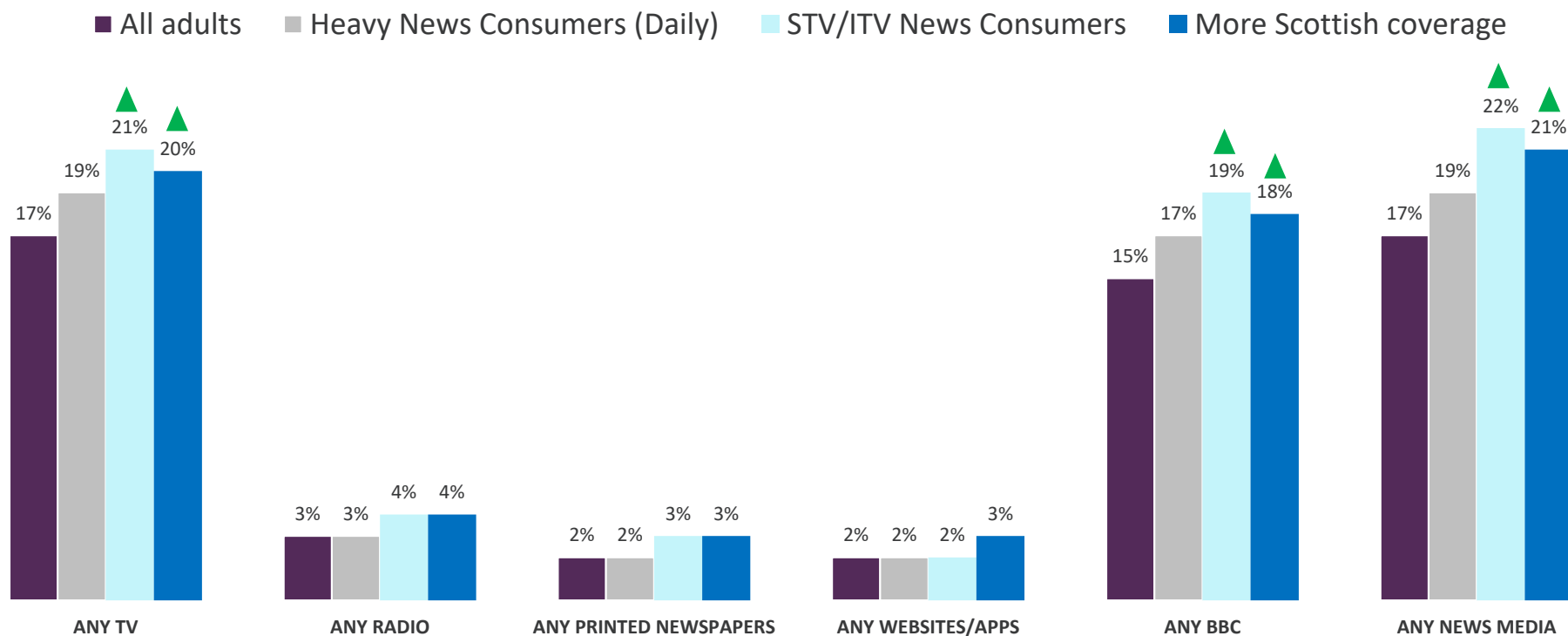
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Arrows show any significant difference (95% level) between socio-economic groupings (SEG) or locations (Urban/Rural)

Substitution of any news source is more likely among STV/ITV news consumers and those with an interest in more Scottish coverage

Incidence of consuming less news if BBC Scotland launched with 9pm news programme



Incidence of consuming less news if BBC Scotland launched with 9pm news programme among potential viewers – score of 2-5 out of 5 for likely to watch

25%

4%

3%

3%

22%

26%

Source: Ofcom BBC Scotland

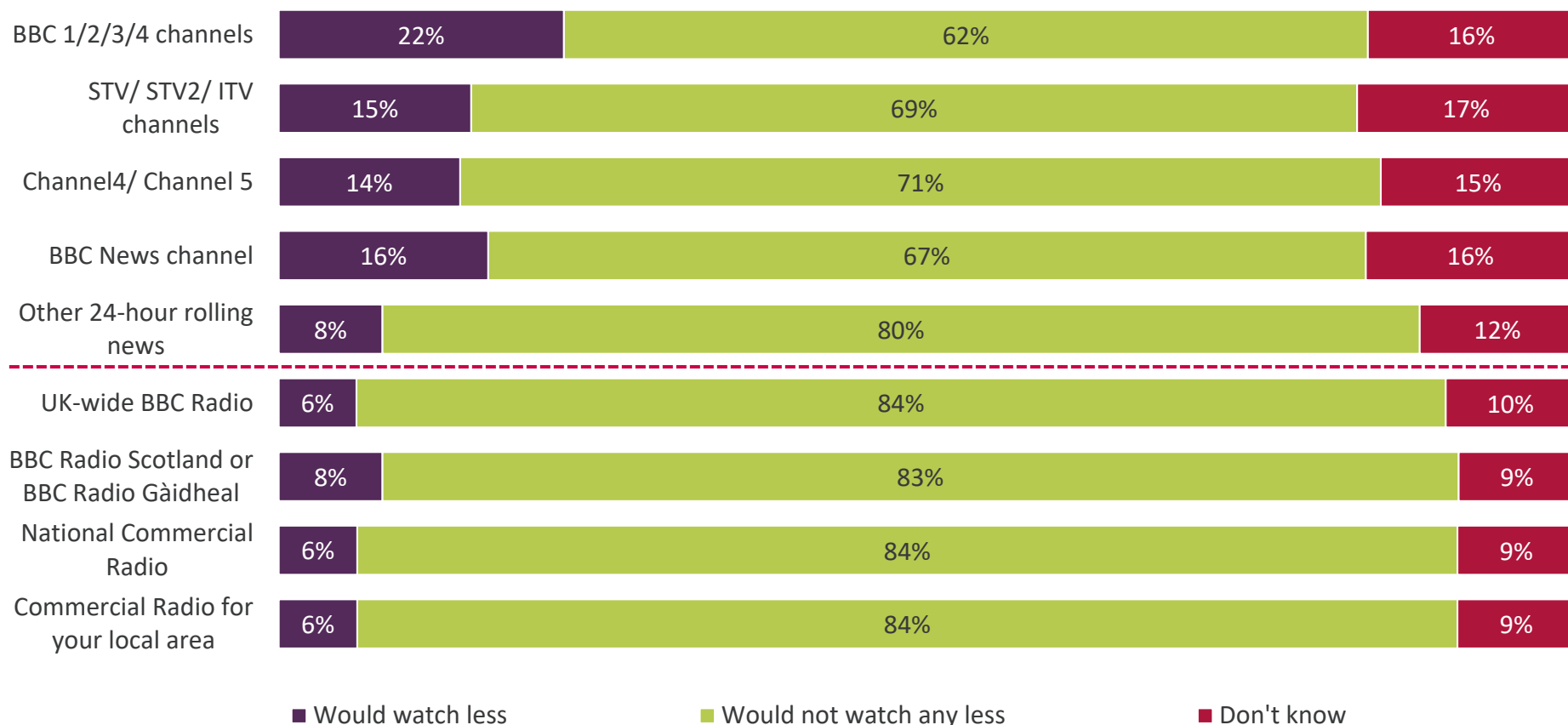
D6: Do you think you would consume less news as a result on any of the following?

Base: All adults aged 16+ (n=1,111) All adults aged 16+ who would potentially watch the 9pm news programme on the BBC Scotland channel (coded 2-5 at D4) (n=748)

Arrows show any significant difference (95% level) between sub-groups shown and all adults

Most potential viewers of the 9pm news programme say they would not reduce consumption of their current news sources. Those who say they would consume less are most likely to say they would reduce BBC TV news.

Incidence of consuming less news from current news sources if 9pm news programme launched



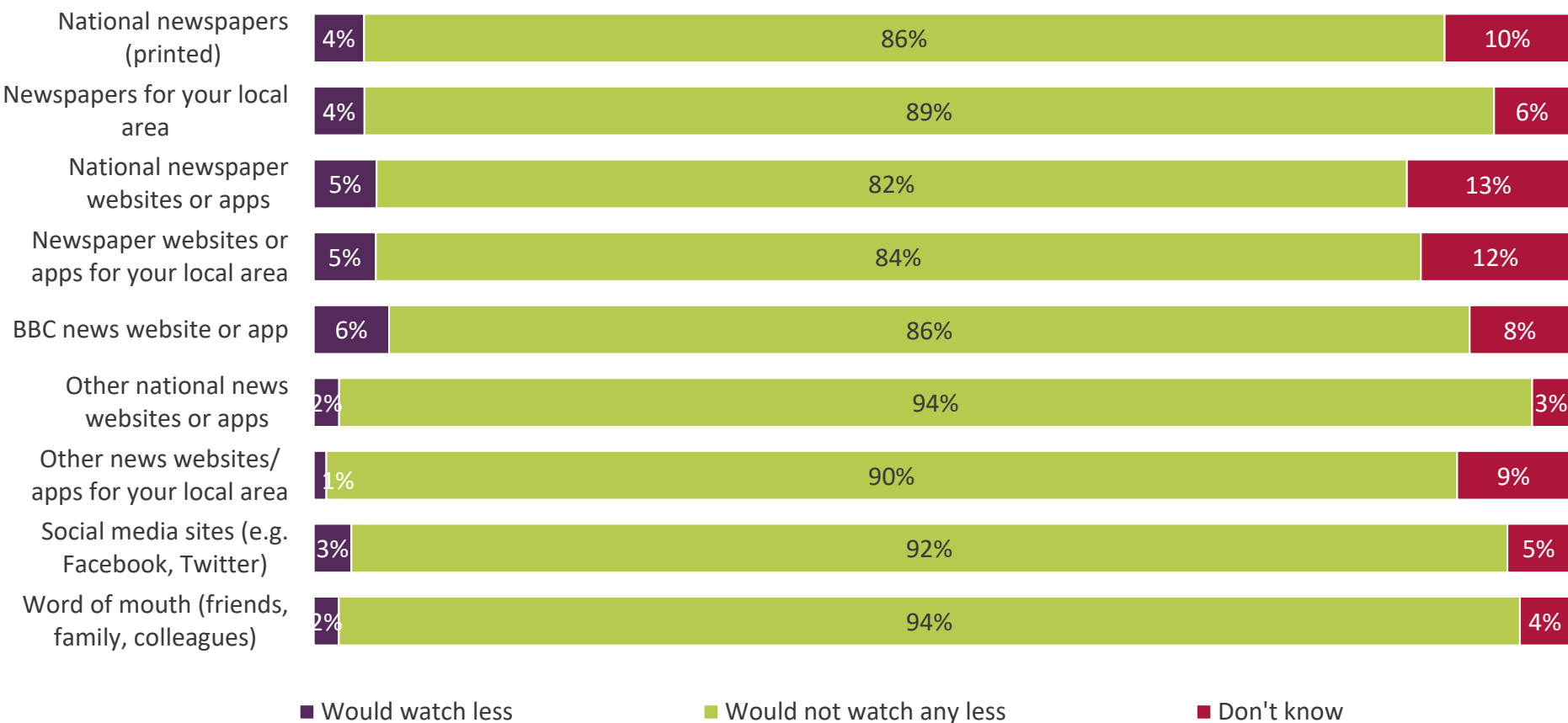
Source: Ofcom BBC Scotland

D6: You said you would watch the 9pm weekday news on BBC Scotland. Do you think you would consume less news as a result on any of the following?

Base: All adults aged 16+ who use each of the news sources in question and are potential 9pm news programme viewers (BBC 1/2/3/4 n= 664, STV & ITV channels n=606, Channel 4/5 n=309, BBC News channel n=448, Other 24-hour rolling news n=278, UK-wide BBC Radio n=291, BBC Radio Scotland or BBC Radio Gàidheal n= 192, National Commercial Radio (230), Commercial Radio for your local area (271))

Few potential viewers of the 9pm news programme using newspapers, websites or apps or other sources for news say they will use these less.

Incidence of consuming less news from current news sources if 9pm news programme launched



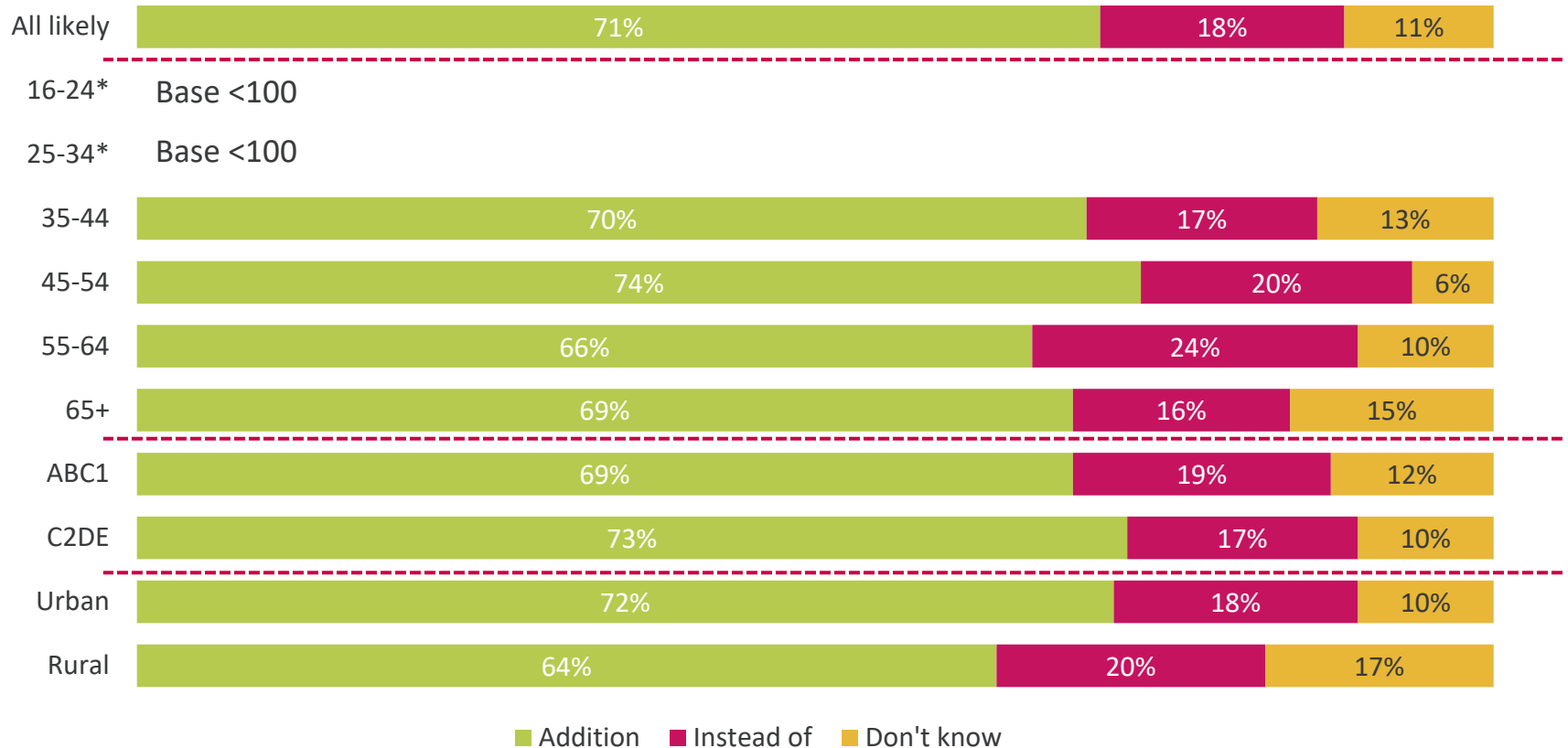
Source: Ofcom BBC Scotland

D6: You said you would watch the 9pm weekday news on BBC Scotland. Do you think you would consume less news as a result on any of the following?

Base: All adults aged 16+ who use each of the news sources in question and are potential 9pm news programme viewers (BBC 1/2/3/4 n= 664, STV & ITV channels n=606, Channel 4/5 n=309, BBC News channel n=448, Other 24-hour rolling news n=278, UK-wide BBC Radio n=291, BBC Radio Scotland or BBC Radio Gàidheal n= 192, National Commercial Radio (230), Commercial Radio for your local area (271))

Overall, among potential viewers of the 9pm news programme, around one fifth think they would watch instead of existing news consumption

Whether potential viewers think they would watch in addition to or instead of their existing news consumption



Source: Ofcom BBC Scotland

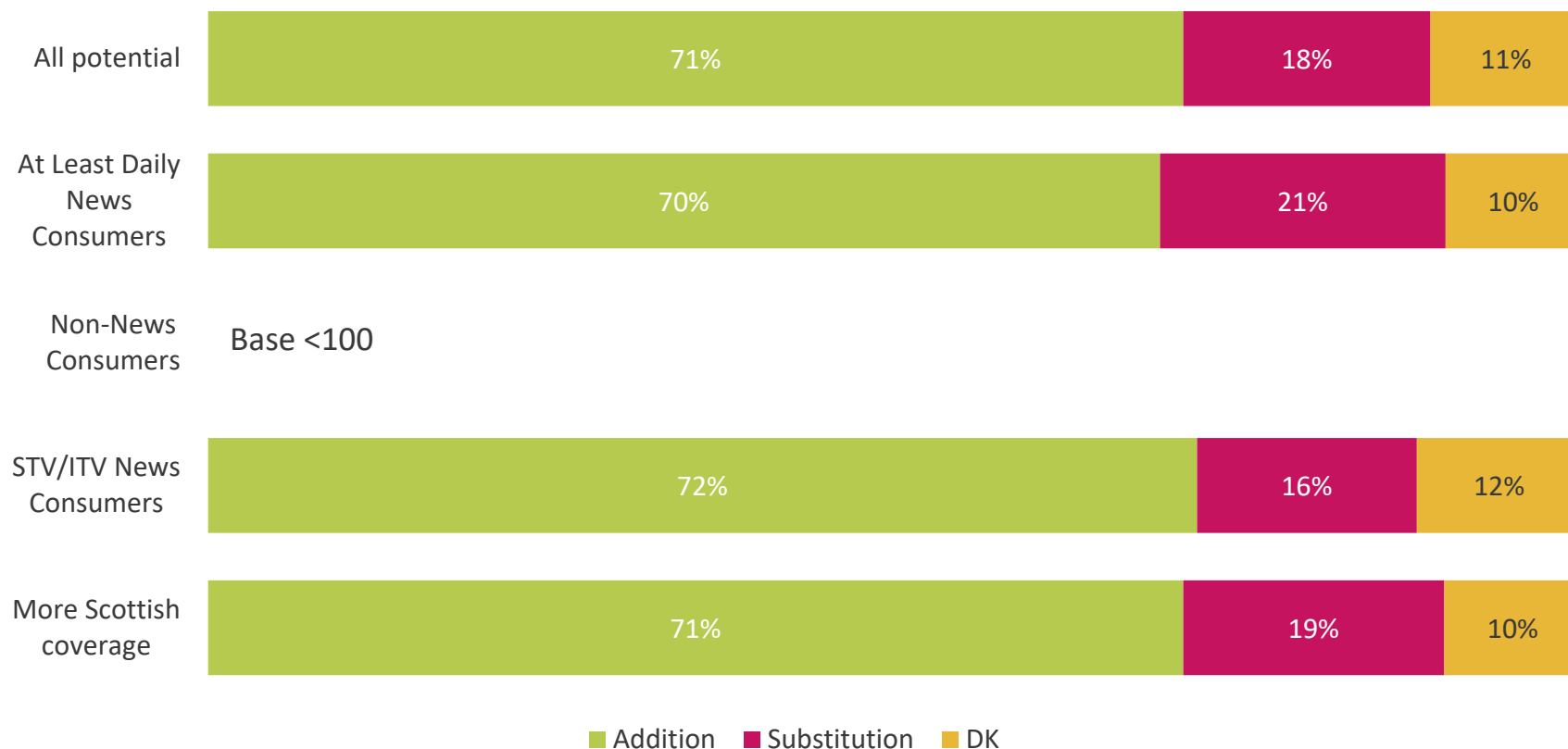
D8: Do you think you would watch it in addition to or instead of your existing news consumption from other sources?

Base: All adults aged 16+ who would potentially watch the 9pm news programme on the BBC Scotland channel (coded 2-5 at D4) (n=748) *Base for 16-24s and 25-34s below 100

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

Among potential viewers of the 9pm news programme, there are no differences between the sub-groups of news consumers

Whether potential viewers think they would watch in addition to or instead of their existing news consumption



Source: Ofcom BBC Scotland

D8: Do you think you would watch it in addition to or instead of your existing news consumption from other sources?

Base: All adults aged 16+ who would potentially watch the 9pm news programme on the BBC Scotland channel (coded 2-5 at D4) (n=748) *Base for non-news consumers below 100

Arrows show any significant difference (95% level) between sub-groups shown and all adults

Section 5

Content for and about Scotland

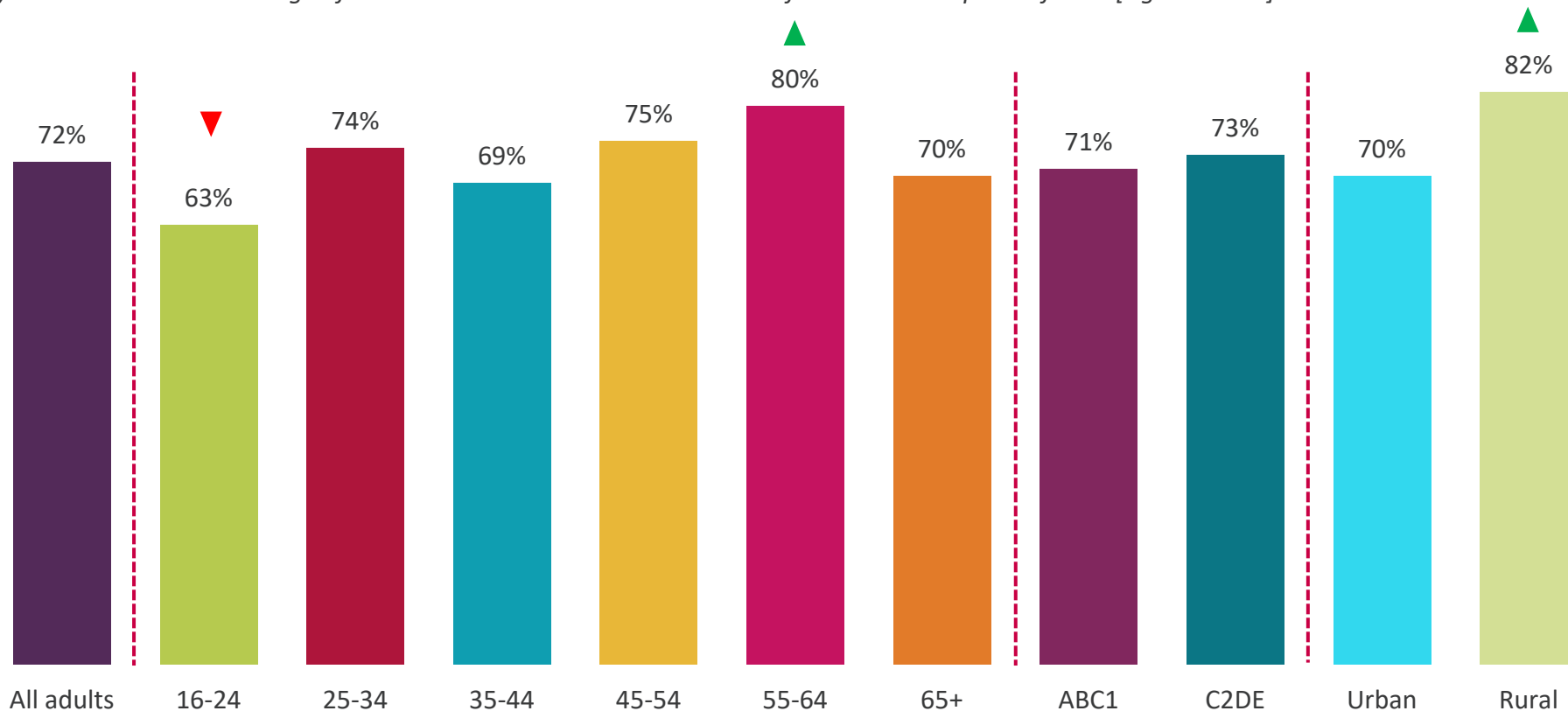
Seven in ten of all adults in Scotland have an interest in more Scottish coverage – higher among older and rural adults

Incidence of interest in for more Scottish coverage

a) I think Scottish issues should be given more attention in the news [Agree = 65%]

b) I have enough access to news about Scotland [Disagree = 24%]

c) I would like more coverage of UK and international news and events from a Scottish point of view [Agree = 58%]



Source: Ofcom BBC Scotland

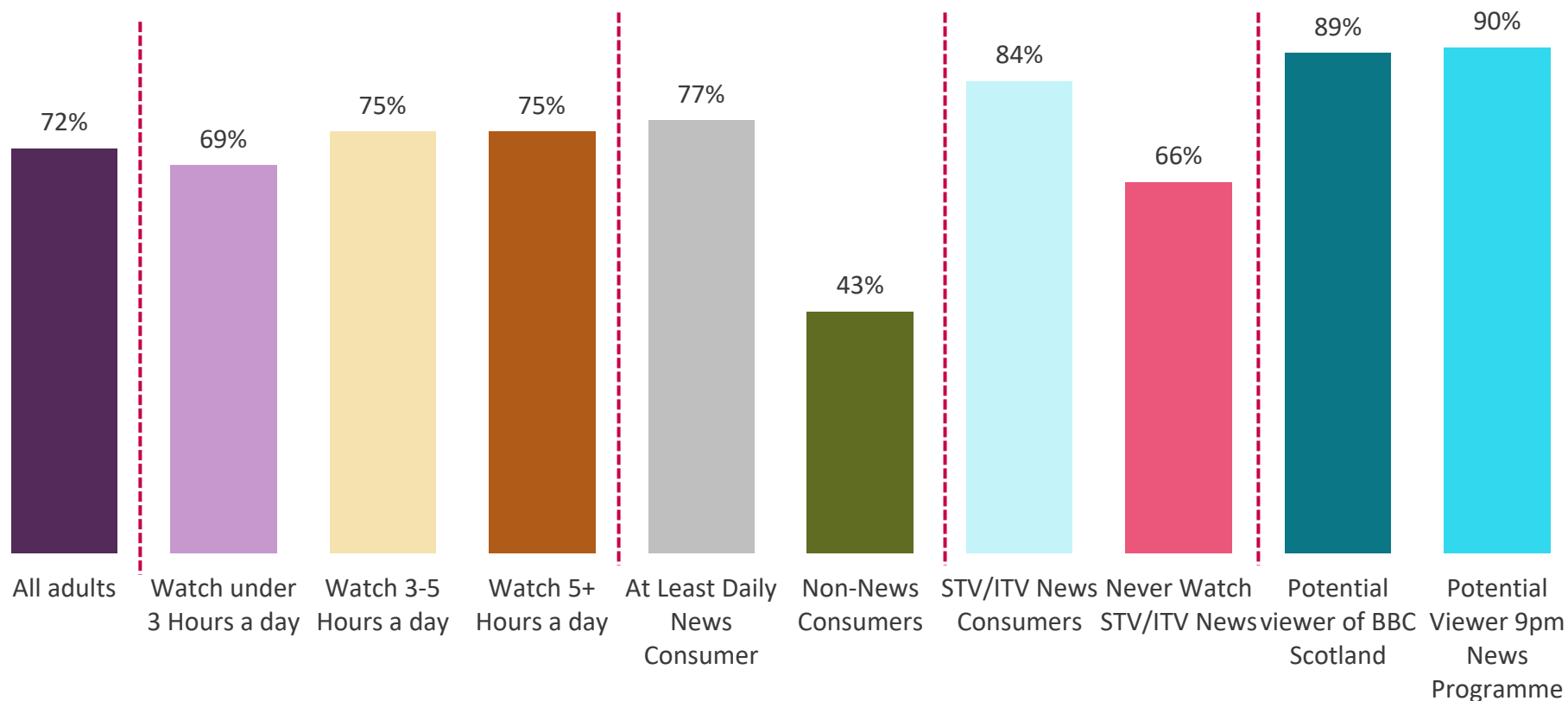
D7: And how much do you agree or disagree with the following statements?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

Interest in more Scottish coverage is higher among heavy TV & heavy news consumers, STV/ITV viewers and likely BBC Scotland viewers

Incidence of interest in for more Scottish coverage



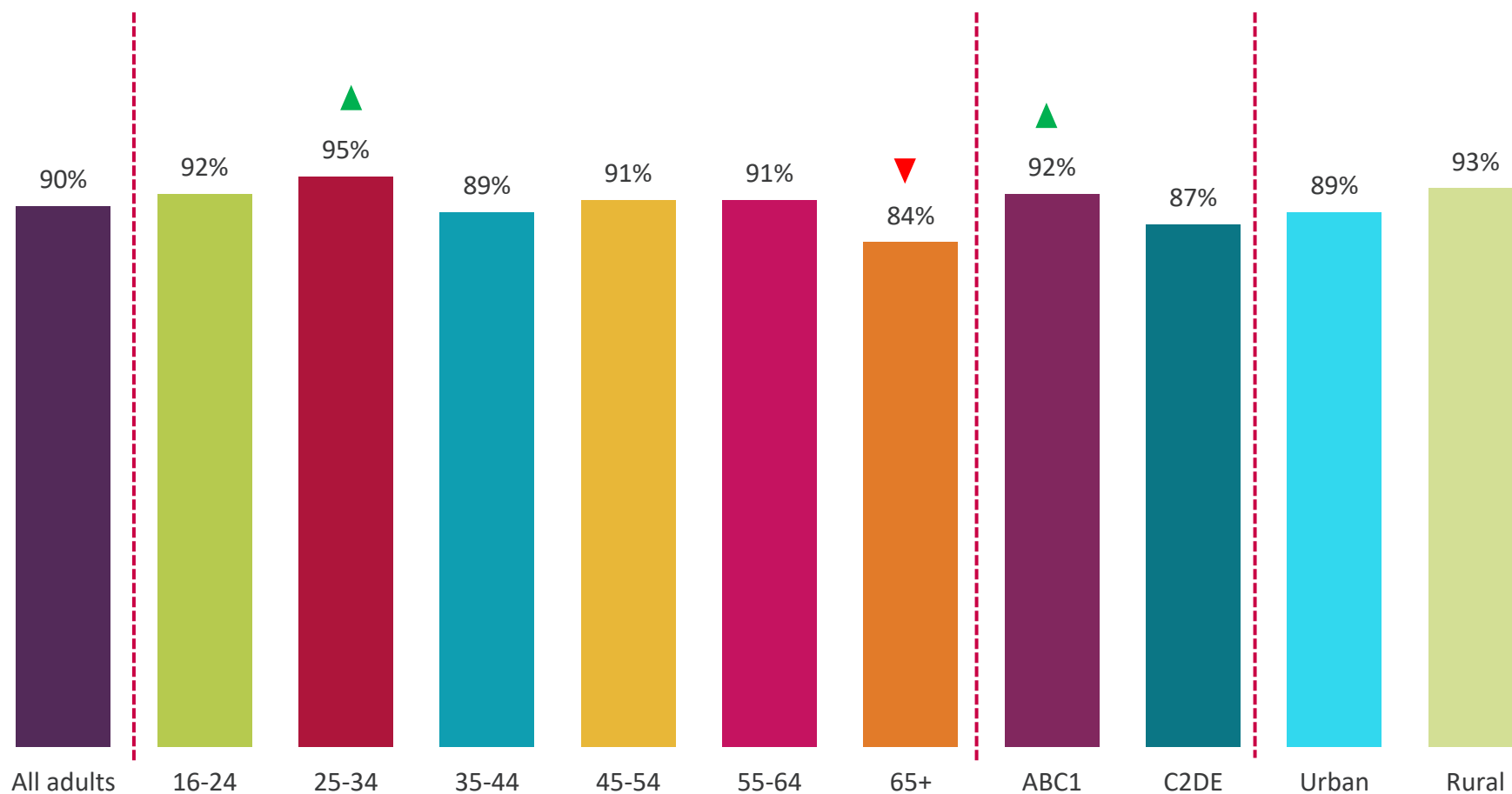
Source: Ofcom BBC Scotland

D7: And how much do you agree or disagree with the following statements?

Base: All adults aged 16+ (n=1,111)

Nine in ten adults in Scotland use any non-TV source for content for and about Scotland (press for older adults, social media for younger)

Incidence of using sources other than TV to consume content for and about Scotland



Source: Ofcom BBC Scotland

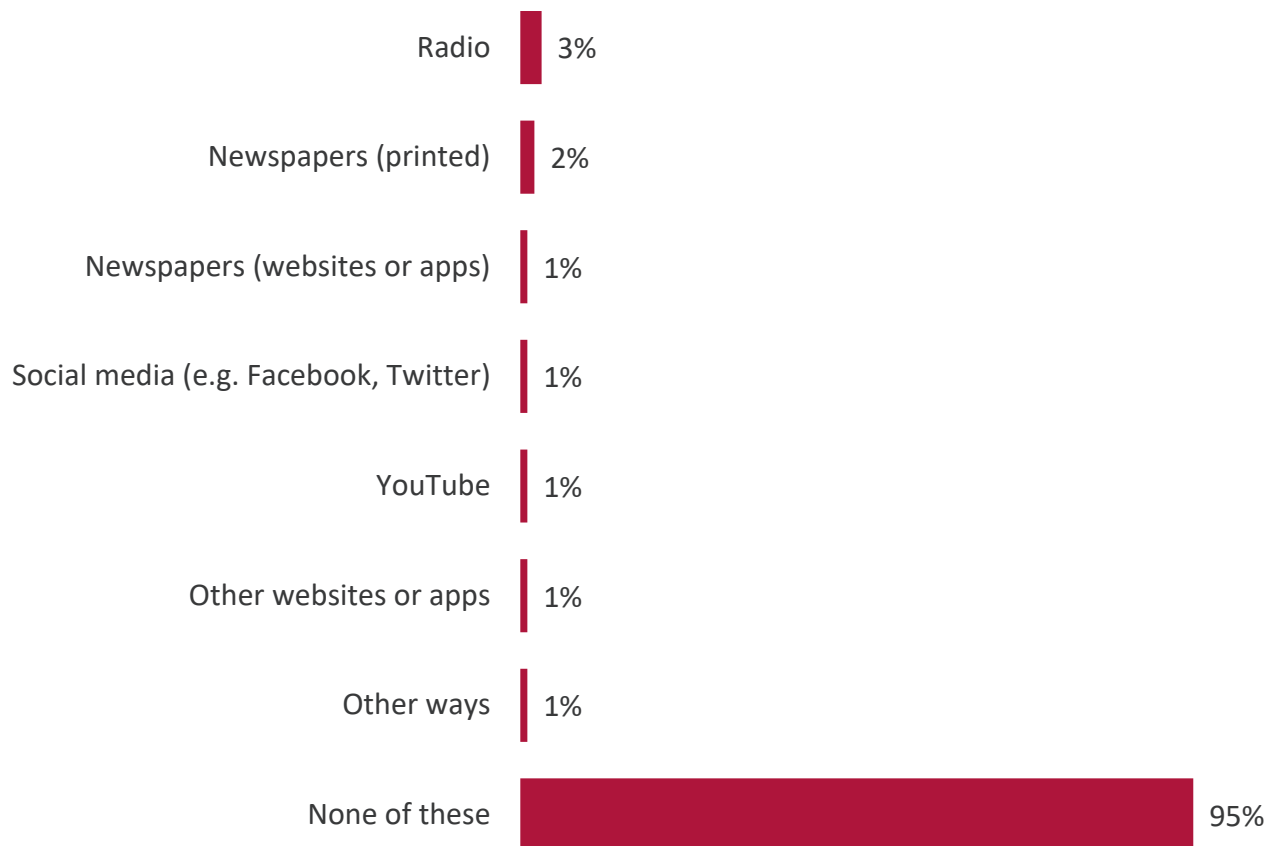
E1/E2: Thinking about all of these kinds of programmes, how often do you currently use any of the following sources, other than television, for any of these types of content for and about Scotland?

Base: All adults aged 16+ (n=1,111)

Arrows show any significant difference (95% level) between all adults (Age), or between socio-economic groupings (SEG) or locations (Urban/Rural)

Few potential viewers think they would use the new BBC Scotland channel instead of their existing non-TV sources for content for and about Scotland

Incidence of using non-TV sources less for content for and about Scotland if BBC Scotland launched



Source: Ofcom BBC Scotland

E2: Do you think you would consume content for and about Scotland via the new BBC Scottish channel in addition to or instead of your existing consumption from these other sources?

Base: All adults aged 16+ who use any non-TV sources for types of content for and about Scotland who are potential viewers of the new BBC Scotland channel (n=998)

Conclusions

Conclusions (1)

One in five (21%) adults in Scotland say they would definitely not watch the new BBC Scotland channel, 44% say they would be very likely to watch.

Older adults are more likely to say they are very likely to watch

Those who watch news at least daily, STV/ITV news viewers and those with an interest in more Scottish coverage are more likely to say they would be very likely to watch

Two-thirds (67%) of Scottish adults say they would watch the new channel at least once a week.

Potential viewers are most likely to say they would watch via live/linear viewing (97%) rather than recorded/catch-up viewing (14%)

One in five (21%) Scottish adults say they would watch less of any other TV channels or services if the new channel was launched

22% say they would watch the new channel instead of BBC channels or services (based on potential viewers who watch BBC channels). This is higher than the 10% who say they would watch instead of STV/ITV (based on potential viewers who watch ITV/STV).

Conclusions (2)

Two-thirds (67%) of adults in Scotland say they would be at all likely to watch the 9pm news programme on the BBC Scotland channel

This is more likely among older adults

It is also more likely among those who are at least daily news consumers, STV/ ITV news consumers and those with an interest in more Scottish news coverage

Over half (56%) of all Scottish adults say they would watch the 9pm news programme at least once a week

One in five (17%) of all adults in Scotland say they would consume other news sources less as a result of watching the 9pm news programme

Potential viewers are much more likely to substitute TV news sources (25%) than radio (4%), press (3%) or websites/ apps (3%) (based on potential viewers who use each news source).

The biggest impact was on BBC news sources (22%)

Among STV/ ITV news viewers who would be at all likely to watch the 9pm programme, 12% say they would watch STV/ ITV news less as a result

Conclusions (3)

Over seven in ten (72%) of adults in Scotland have an interest in more Scottish coverage (more attention in the news/ more access to news about Scotland/ more from a Scottish point of view)

This is higher among older adults and those living in rural areas

It is also higher among at least daily news consumers, STV/ ITV news consumers - and potential viewers of the new BBC Scotland channel

Most adults in Scotland (90%) say they use any sources other than TV for content for and about Scotland

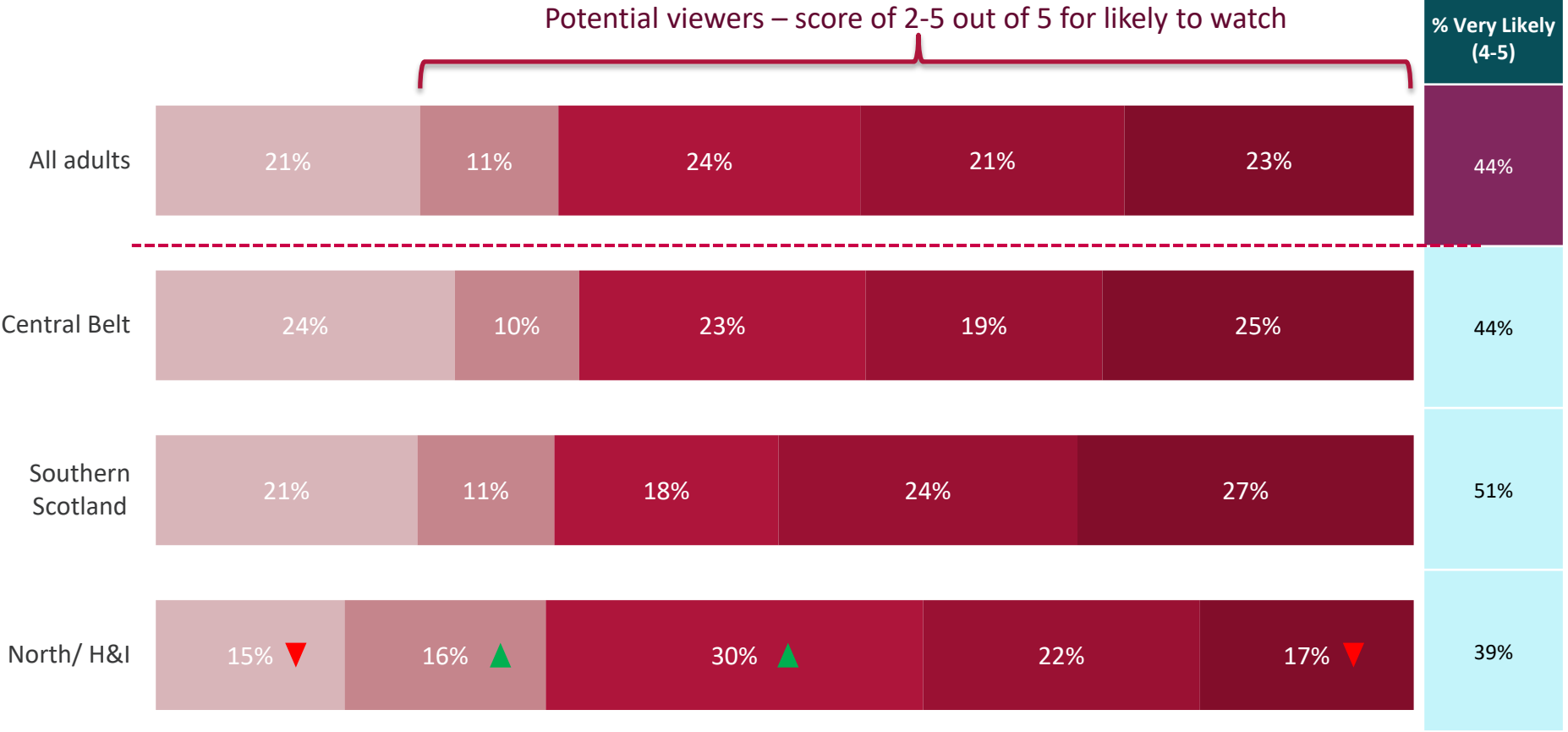
Around half say they use newspapers, radio or social media

Very few (5%) potential viewers of BBC Scotland think they would use the new channel instead of the non-TV sources they currently use

Annex – findings from key questions by geographical areas

Eight in ten adults in Scotland (79%) say they would be at all likely to watch the new BBC Scotland channel – higher for North/ H&I (85%)

Likelihood of watching the new BBC Scotland channel



■ 1 - I would definitely not watch the new BBC Scotland channel ■ 2 ■ 3 ■ 4 ■ 5 - I would definitely watch the new BBC Scotland channel

Source: Ofcom BBC Scotland

B1: On a scale of one to five, how likely do you think you would be to watch the new BBC Scotland channel?

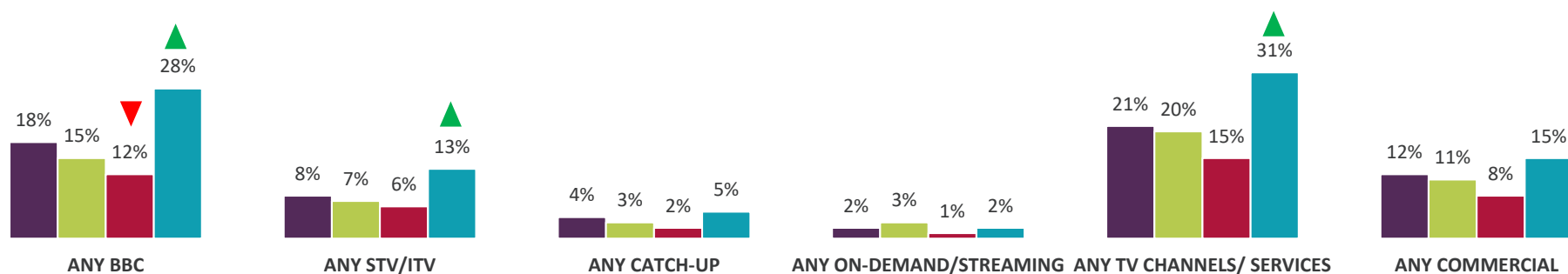
Base: All adults aged 16+ (n=1,111), those in the Central Belt (673), Southern Scotland (165), North Scotland/ Highlands & Islands (273)

Arrows show any significant difference (95% level) between all adults and those in a particular region

Two in ten (21%) of all adults in Scotland say any TV channels or services would be used less – higher for North/ H&I (31%)

Incidence of watching TV channels/ services less if BBC Scotland launched

■ All adults ■ Central Belt ■ Southern Scotland ■ North/ H&I



Incidence of watching TV channels/ services less if BBC Scotland launched among potential viewers – score of 2-5 out of 5 for likely to watch

22%

10%

5%

3%

27%

15%

Source: Ofcom BBC Scotland

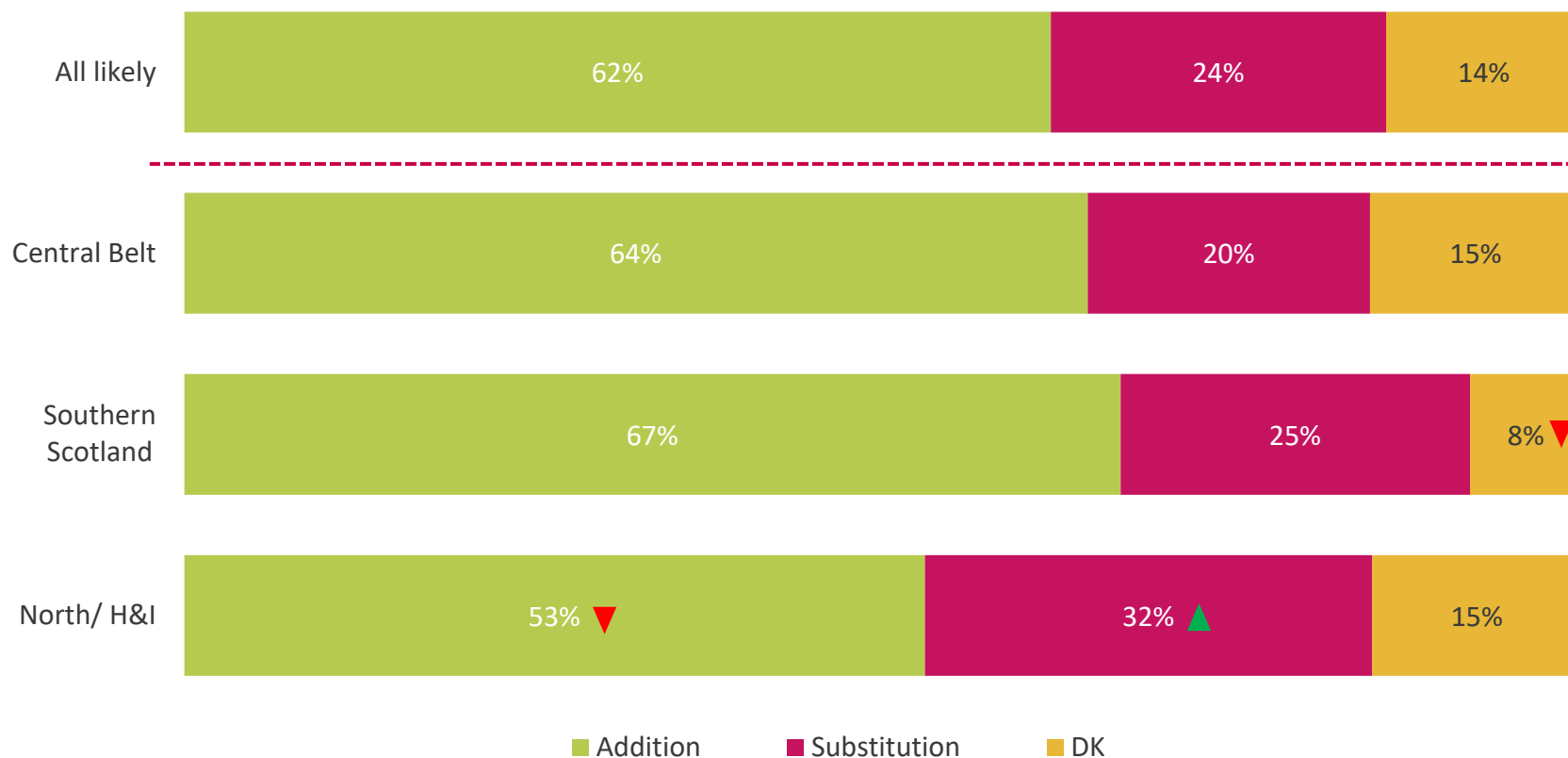
C1: Do you think you would watch any of these channels or services **less** if the new BBC channel launched?

Base: All adults aged 16+ (n=1,111), those in the Central Belt (673), Southern Scotland (165), North Scotland/ Highlands & Islands (273), All adults aged 16+ who would potentially watch the BBC Scotland channel (coded 2-5 at B1) (n=878)

Arrows show any significant difference (95% level) between all adults and those in a particular region

Among potential viewers, one quarter (24%) think they would watch the new channels instead of existing viewing, higher for North/ H&I (32%)

Whether potential viewers think they would watch in addition to or instead of their existing viewing



Source: Ofcom BBC Scotland

C2: Do you think you would you watch BBC Scotland in addition to or instead of your existing television viewing?

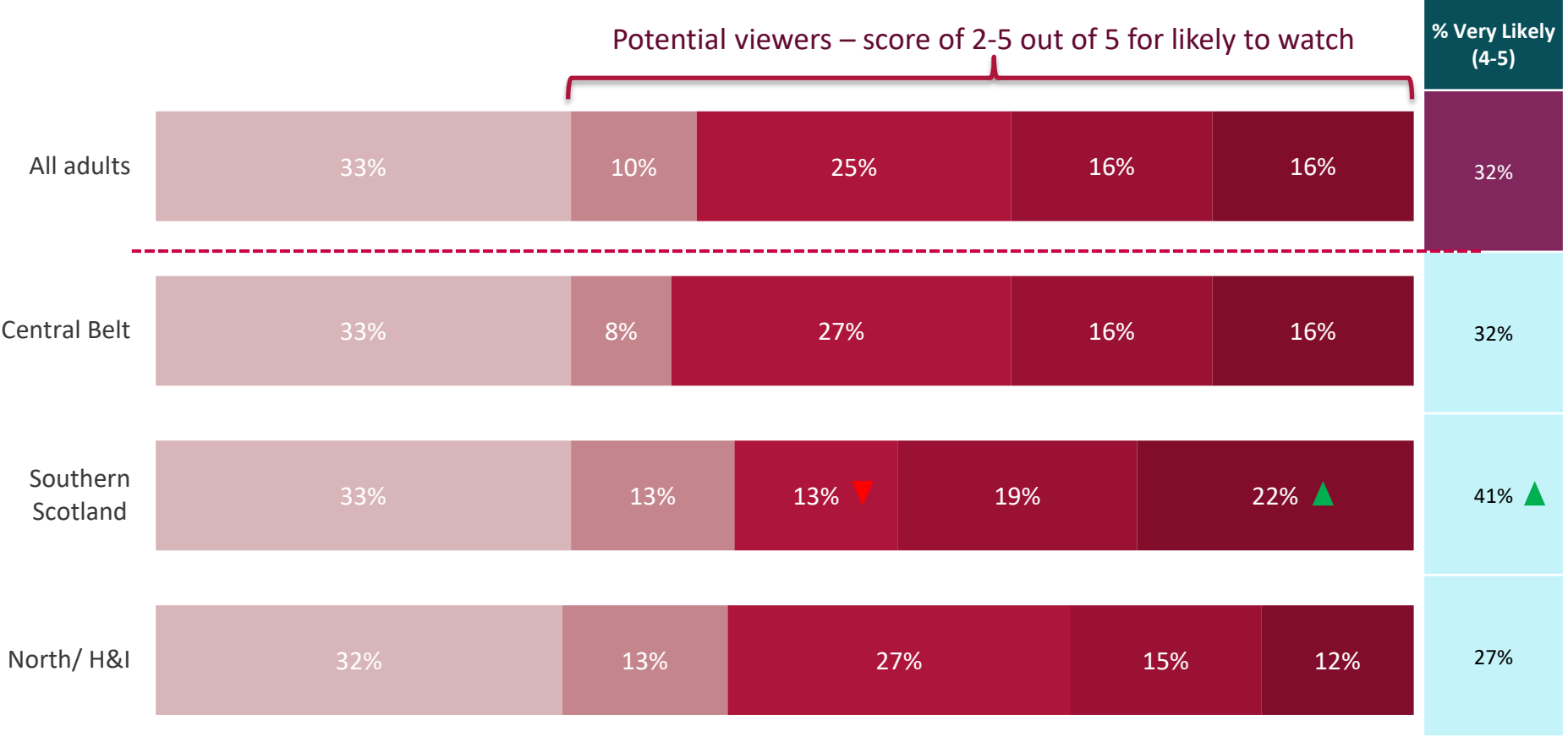
Base: All adults aged 16+ who would potentially watch the BBC Scotland channel (coded 2-5 at B1) (n=878), those in the Central Belt (514), Southern Scotland (131), North Scotland/ Highlands & Islands (233)

Arrows show any significant difference (95% level) between all adults and those in a particular region



One-third of adults in Scotland (32%) say they would be very likely to watch the 9pm news programme, higher in Southern Scotland (41%)

Likelihood of watching the 9pm news programme on the new BBC Scotland channel



■ 1 - I would definitely not watch the new BBC Scotland channel ■ 2 ■ 3 ■ 4 ■ 5 - I would definitely watch the new BBC Scotland channel

Source: Ofcom BBC Scotland

D4: On a scale of one to five how likely do you think you would be to watch the 9pm news programme on the new BBC Scotland channel?

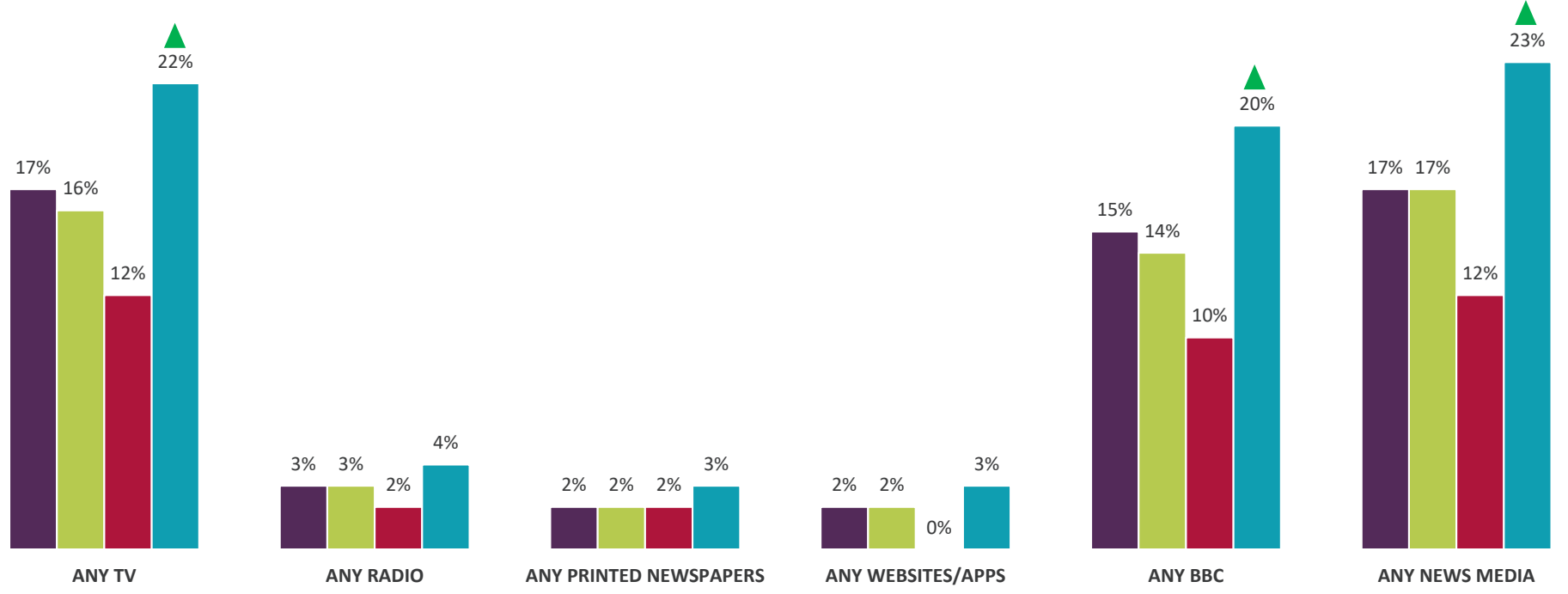
Base: All adults aged 16+ (n=1,111), those in the Central Belt (673), Southern Scotland (165), North Scotland/ Highlands & Islands (273)

Arrows show any significant difference (95% level) between all adults and those in a particular region

Two in ten (17%) of all adults in Scotland say they would use any news sources less, higher for North/ H&I (32%)

Incidence of consuming less news if BBC Scotland launched with 9pm news programme

■ All adults ■ Central Belt ■ Southern Scotland ■ North/ H&I



Incidence of consuming less news if BBC Scotland launched with 9pm news programme among potential viewers – score of 2-5 out of 5 for likely to watch

25%	4%	3%	3%	22%	26%
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Source: Ofcom BBC Scotland

D6: Do you think you would consume less news as a result on any of the following?

Base: All adults aged 16+ (n=1,111), those in the Central Belt (673), Southern Scotland (165), North Scotland/ Highlands & Islands (273), All adults aged 16+ who would potentially watch the 9pm news programme on the BBC Scotland channel (coded 2-5 at D4) (n=748)

Arrows show any significant difference (95% level) between all adults and those in a particular region