



Media nations: Scotland 2019



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Overview

This is Ofcom's second annual *Media Nations: Scotland* report. The report reviews key trends in the television and audio-visual sector as well as the radio and audio industry in Scotland. It provides context to the work Ofcom undertakes in furthering the interests of consumers and citizens in the markets we regulate.

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

The report provides updates on several datasets, including bespoke data collected directly from licensed television and radio broadcasters (for output, spend and revenue in 2018), Ofcom's proprietary consumer research (for audience opinions), and BARB and RAJAR (for audience consumption). It should be noted that our regulatory powers do not permit us to collect data directly from online video-on-demand and video-sharing services (such as Netflix, Amazon Prime Video and YouTube) for research purposes, and therefore we also use third-party sources for information relating to these services.

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Key points

On average, people in Scotland watched 3 hours 33 minutes of broadcast TV in 2018 – 13 minutes less than in 2017

- Average daily viewing minutes in Scotland declined by 5.6% between 2017 and 2018 compared to an average of 5.2% across the whole of the UK.
- Viewing of non-broadcast services on the TV set (such as streaming services like Netflix and Amazon Prime Video, or gaming) increased by eight minutes a day in 2018, to 48 minutes per person per day.
- Still Game was the most-viewed programme in Scotland in 2018.
- Three of the top 20 most-viewed programmes in 2018 were shown only in Scotland. Hogmanay Live was ninth while Hogmanay staple Only an Excuse? was the eleventh most popular programme; both were on BBC One Scotland.
- Four of the top 20 programmes were broadcast on STV, including two football matches from the men's World Cup in Russia, while the only Channel 4 programme to make the top 20 was The Great British Bake Off.

More than half of TV households in Scotland had a television connected to the internet in 2019

- Almost six in ten (56%) TV households in Scotland have some form of connected TV.
- Half of adults in Scotland (50%) claimed to use any type of on-demand service (whether paid-for or free) in 2019.
- Among these services, both Netflix and BBC iPlayer had the most claimed use among respondents in Scotland (at 32% and 28% respectively), followed by Amazon Prime Video (22%).

More than half of all broadcast TV viewing in Scotland in 2018 was to the main PSB channels

- In 2018, the main five PSB channels accounted for a combined 53.6% share of the total broadcast TV audience in Scotland. This was the highest combined share of any of the UK nations.
- Television is the most-used source of general news for people in Scotland, with BBC One and STV coming first and second in the list of most-used news sources.

Around three-quarters of PSB viewers in Scotland were satisfied with PSB provision in 2018 (73%)

- This compares with 74% for the UK average, 74% in England, 74% in Wales and 77% in Northern Ireland.
- When asked about PSBs' delivery of '*showing different parts of the UK, including England, Northern Ireland, Scotland and Wales*', 55% of viewers in Scotland rated this highly, compared to 63% of viewers in Northern Ireland, 55% in England and 52% in Wales.

BBC, STV and ITV combined spend on programming for viewers in Scotland declined in real terms by 3% in 2018 to £53.3m

- Spending by STV/ITV was down £0.5m to £10m, a fall of 4.7%, while spending by the BBC was £1.1m lower at £43.3m, a fall of 2.4% since 2017.
- Spend on news programming fell by 5.8% in real terms, from £20.4m in 2017 to £19.2m in 2018, in a year without a major political event.
- STV's first-run UK-originated hours in Scotland were five hours lower in 2018 at 894 hours.
- The BBC produced 740 hours of first-run Scottish content in 2018, a decline of 11 hours on 2017.

More than eight in ten adults listen to the radio each week, tuning in for nearly 20 hours every week

- In 2019, digital listening in Scotland accounted for more than half of all listening (55.1% in Q1 2019) across DAB, internet and DTV combined.
- More than two-thirds of adults in Scotland (70%) owned a DAB radio, either in the home or the car, at the end of Q1 2019. This was higher than in any other UK nation.
- Meanwhile, ownership of smart speakers, with uses including streaming music and listening to live radio, has increased to a fifth (21%) of households.



TV services and devices

Introduction

TV services are available in a variety of ways in Scotland. Freeview is available through digital terrestrial television (DTT) while Sky and Freesat offer satellite services and Virgin Media offers a cable TV service. Set-top boxes from providers including TalkTalk and BT offer a Freeview service, alongside pay-TV channels delivered through an internet connection (sometimes referred to as internet protocol television or IPTV).

There are also a growing number of on-demand and streaming services available to consumers online. These range from PSB services like BBC iPlayer, STV Player, ITV Hub, All4 and My5 to the subscription services offered by Netflix and Amazon Prime Video.

These platforms rely on differing infrastructure to deliver their services. Freeview uses a network of main and relay transmitters across Scotland to deliver television services into people's homes. These services are widely though not universally available across Scotland.

Satellite, which only requires a user to attach a dish to their home, is near-universally available across Scotland. Cable coverage, by comparison, is more limited as it requires a provider to have laid a cable past the premises in order for it to be connected.

Services such as Netflix, Amazon Prime Video and YouTube are delivered over the internet through connected TVs as well as mobile phones and tablets. Ofcom research shows that three-quarters (76%) of households in Scotland had a fixed internet connection in 2019. Seventy-six per cent of adults now own a smartphone, while 49% of households in Scotland have a tablet device.¹

98.7% of premises in Scotland had Freeview coverage in 2019²

Digital terrestrial television (DTT) services, which are delivered through a television aerial, are provided in Scotland through a combination of public service broadcasting (PSB) and commercial (COM) multiplexes. These multiplexes are the transmission infrastructure that delivers channels carried on the Freeview platform.

¹ Ofcom Technology Tracker 2019

² Ofcom analysis of DTT coverage and operator data, January 2019

Examples of services on the PSB multiplexes include BBC One, STV, Channel 4, Channel 5 and BBC Scotland, while the COM multiplexes provide access to services such as Dave, Sky News and E4.

As of January 2019, 98.7% of premises in Scotland had access to the core PSB services. Coverage of the commercial multiplexes, which are carried on the main transmitters only, reached 88.7% of premises.³

However, this varies across the country; the Shetland Islands (16%), Argyll and Bute (9%), Na h-Eileanan Siar (8%) and the Highlands (7%) have significantly higher proportions of premises with no coverage of PSB services.

A slightly lower proportion of households in Scotland had a TV set (94.5%) in 2019, compared to any of the other nations. More than a third of homes (35.7%) had a digital terrestrial TV service (DTT) as their only TV platform at the beginning of 2019. This was also a lower proportion of homes than in any other nation.⁴

More than a third of homes in Scotland have a satellite service

Satellite TV services provided by Sky and Freesat are available to around 98% of UK premises⁵, with broadly the same level of availability across Scotland.

Paid satellite was the most common pay-TV service in Scotland at the beginning of 2019, with 31.4% of homes having such a service, a 6pp decline since its peak in 2014. A further 6.6% had a free satellite service, meaning that at 38%, satellite TV take-up in Scotland was higher than the UK average (36.9%) at the beginning of 2019.⁶

One in ten homes have a cable TV service

Virgin Media's cable service was available to more than a million premises (41%) in Scotland in January 2019.⁷

At the beginning of 2019, 12.5% of households in Scotland had a cable TV service. This was a higher proportion than in Wales (8.1%) and Northern Ireland (11.4%), but not as high as England (14%).⁸

Broadband take-up provides further access to TV content

The proportion of homes that have internet protocol television (IPTV) only (either from BT TV, TalkTalk TV, Plusnet TV or YouView), and do not also have satellite, cable or other service, had been

³ Ofcom analysis of DTT coverage and operator data, January 2019

⁴ BARB Establishment Survey Q1 2019

⁵ Based on the availability of a line-of-sight path to the satellite. Does not include the impact of factors such as access in multi-dwelling units where it is not feasible to install a dedicated household satellite dish and where there is no internal wired distribution system for satellite, or the need for planning permission in some locations.

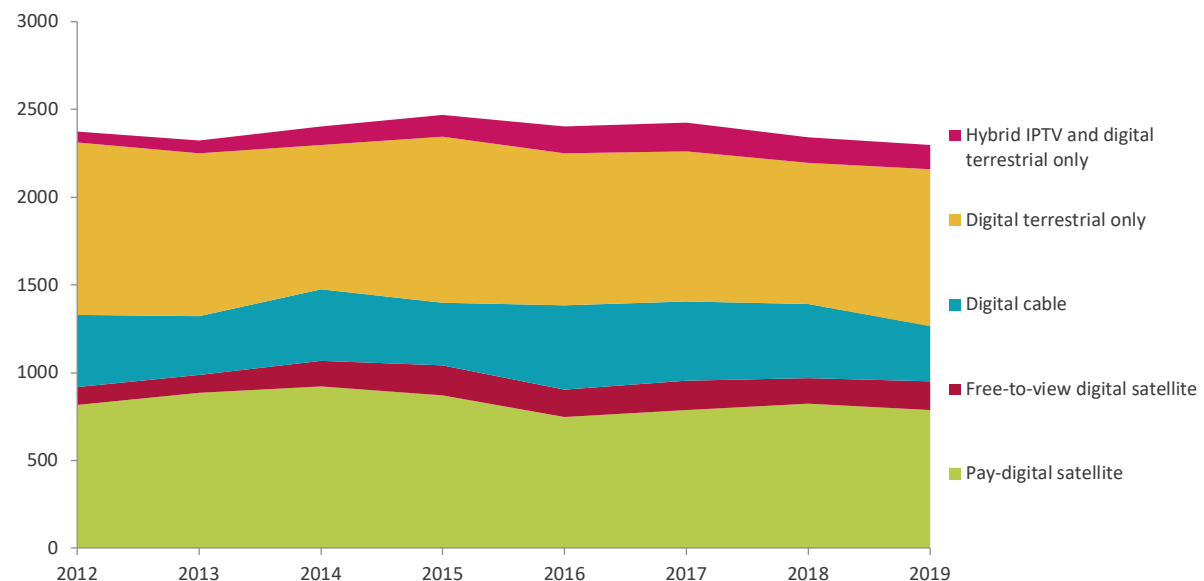
⁶ Source: BARB Establishment Survey Q1 2019

⁷ Ofcom analysis of operator data, January 2019

⁸ Source: BARB Establishment Survey Q1 2019

growing in Scotland but has stabilised since 2018; 5.4% of homes had such a service in Q1 2019, up from 2.5% in Q4 2012 and only marginally different from Q1 2018 (5.8%).⁹

Figure 1: Platform take-up in Scotland, households: 2012-2019 (000s)



Source: BARB Establishment Survey. BBC areas. Household-level data. All TV sets in the home included, so there may be platform overlaps. Notes: Data points are based on Q4 of each year until 2018, when it is Q1. From Q4 2015 the claimed usage element was removed, leading to an increase in the TV set homes population. Digital terrestrial only TV = receives digital TV through an aerial and not through digital satellite (DSAT) / digital cable (DCAB) or other platforms. Hybrid IPTV digital terrestrial only = receives digital terrestrial TV through either BT TV/TalkTalk TV/YouView/Plusnet TV and not DSAT/DCAB/other platforms.

Almost six in ten TV households in Scotland had a television connected to the internet

The number of households connecting their TV to the internet is increasing across the UK. As well as smart TVs, other devices (such as a set-top box, streaming stick, games console, etc) can be connected to a TV set, allowing online content to be viewed.

Almost six in ten (56%) TV households in Scotland had some form of connected TV in 2019, 57% in England, 48% in Wales and 67% in Northern Ireland.¹⁰

Half of adults in Scotland use video-on-demand services

Half of adults in Scotland (50%) claim to use any type of on-demand service (whether paid-for or free) in 2019. This was comparable to the other UK nations, and unchanged for each since last year.

Among these services, both Netflix and BBC iPlayer had the most claimed use among respondents in Scotland (32% and 28% respectively), followed by Amazon Prime Video (22%). Of these three,

⁹ Source: BARB Establishment Survey Q4 2012, Q1 2019

¹⁰ Ofcom Technology Tracker 2019

Amazon Prime Video was the only service whose use increased since 2018 (up 11pp). The STV Player was used by 11% of respondents.¹¹



Paying for on-demand content does not appear to be a deterrent to signing up, as half (52%) of households in Scotland had a paid-for subscription-video-on-demand (SVoD) service in Q1 2019, up from 46% since last year. This is a higher proportion than in any other UK nation. As with the other nations, of the measured SVoDs, Netflix is in the highest proportion of homes (46%).¹²

More SVoD services are on the way

Disney and WarnerMedia and Apple, and the BBC and ITV are set to launch their own SVoD services in 2019 and 2020, increasing the number of services in the SVoD market, currently led by Netflix and Amazon Prime Video.

Apple TV+ is set to launch in autumn 2019, and globally shortly after. The app will be also available on non-Apple devices. The service will provide original content ad-free; Apple currently has 30 original web series and movies in preparation.

Britbox is a joint BBC and ITV venture due to be launched in Q4 2019 at £5.99 per month. ITV will control the venture with a 90% share, with the BBC having the option to increase its holding to 25%. The service will contain archive content as well as Britbox original content commissioned from UK production companies, planned to be available in 2020.

Disney+ is set to launch in the US in November 2019 and then globally shortly after. Disney+ will exclusively stream content from its popular brands Marvel, Lucasfilm and Pixar, offering 500 movies and access to 7,500 episodes.

WarnerMedia is also set to launch the HBO Max service in Spring 2020. The service will include HBO, Turner as well as WarnerMedia content.

¹¹ Ofcom Technology Tracker 2019

¹² Source: BARB Establishment Survey Q1 2019



Screen viewing

Introduction

In recent years there has been a significant rise in the number of new TV services delivered over the internet. At the same time, viewers have started using new devices, such as smartphones and tablets, to view this and other content. Younger viewers especially are avid adopters of these services and devices.

This is inevitably having an impact on our TV watching habits. However, Ofcom's research shows that this trend is gradual rather than precipitous. Take-up of what might be called 'traditional' TV platforms and services, such as Freeview, satellite and cable, remains strong. And while there has been a further drop in the amount of live TV viewing in 2018 in all the nations of the UK, this activity still accounts for a significant majority of people's screen time.

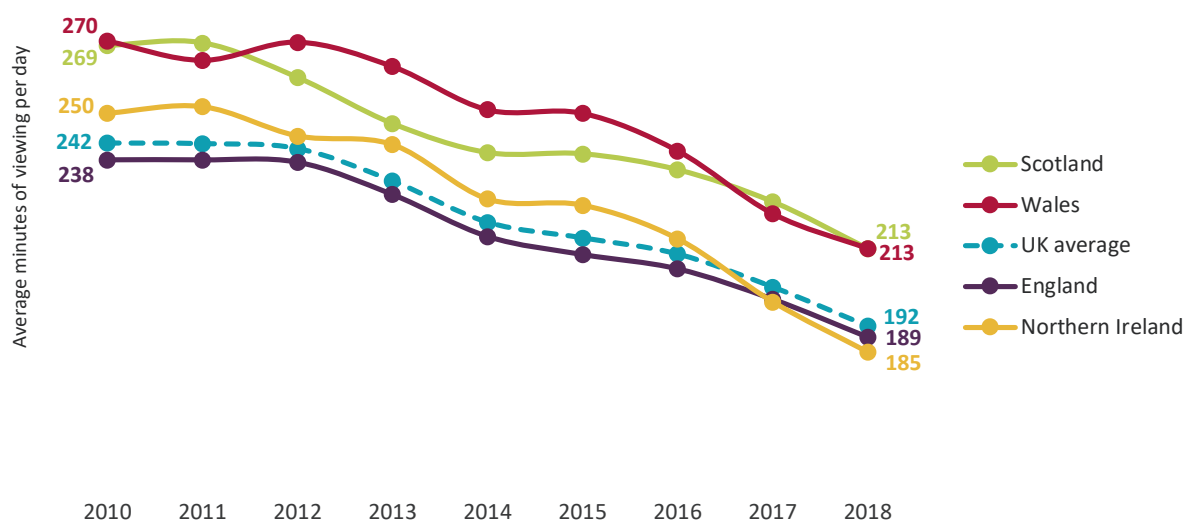
Where our data comes from

This section uses data provided by the Broadcasters' Audience Research Board (BARB), a nationally representative panel of 5,300 homes across the UK (with over 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. BARB has also started to measure what people are watching on PCs/laptops, tablets and smartphones not connected to the TV set, to monitor viewing of broadcaster-video-on-demand (BVOD) services. However, this newer measurement of other devices is not complete and is not yet the industry standard. 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). See the [methodology annex](#) for more information.

People in Scotland, along with those in Wales, watched the most broadcast TV in the UK in 2018

On average, people in Scotland spent 3 hours 33 minutes per day in 2018 watching broadcast television on the TV set; 13 minutes less than in 2017. This was a 5.6% year-on-year decline, compared to an average of 5.2% across the whole of the UK.

Figure 2: Average daily minutes viewed per person, by nation: 2010-2018

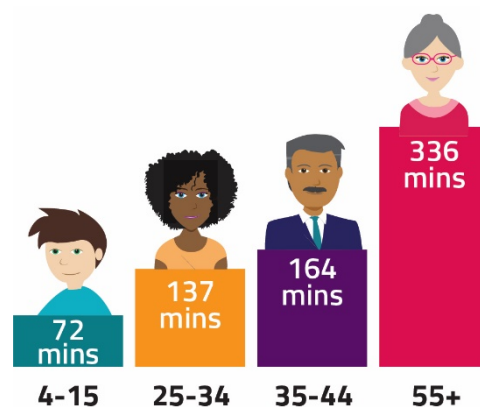


Source: BARB. BBC areas, all individuals (4+).

Young adults are driving the decline of broadcast TV viewing

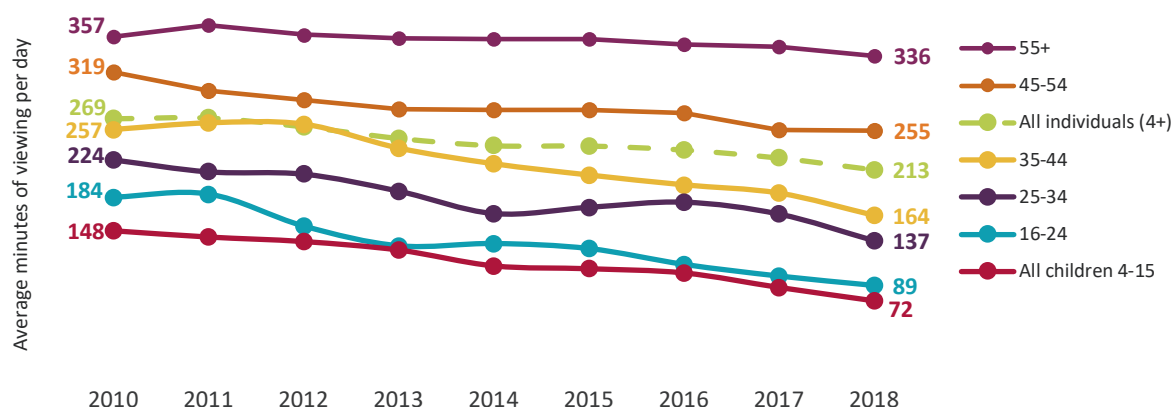
The falling level of viewing by young adults is driving the overall decline in TV consumption in Scotland.

Viewing among 25-34 year olds had the greatest year-on-year decline in 2018, at 17.3%, down to 2 hours 17 minutes. This was also the highest decline in minutes among all age groups (down 29 minutes year on year). Viewing by 35-44 year olds also went down, by 24 minutes. Children aged 4-15 also showed a large percentage decline of 16.6%, down to 1 hour 12 minutes on average per day.



Viewing among 45-54s has remained fairly stable since 2017, with a decline of just 0.5%. As in the rest of the UK, over 54s watch the most TV in Scotland (5 hours 36 minutes on average per day), but their viewing also declined year on year, down by 10 minutes (2.9%).

Figure 3: Average daily minutes viewed per person in Scotland, by age



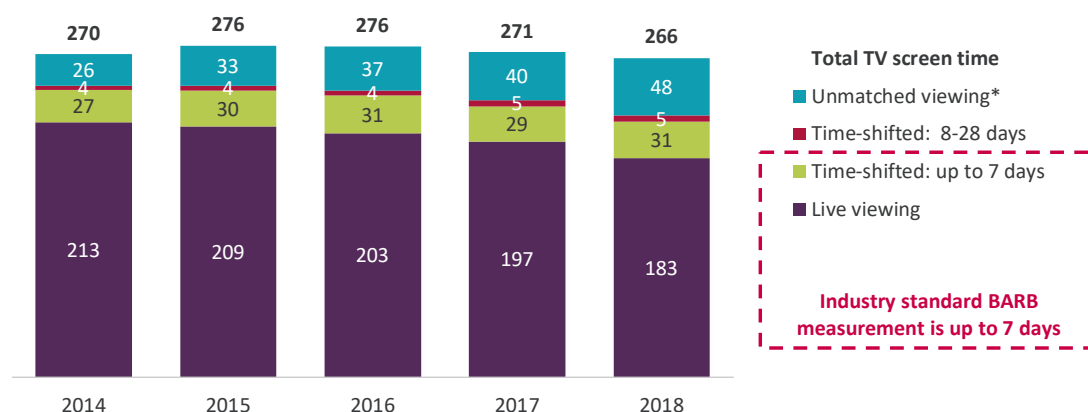
Source: BARB. BBC Scotland area.

Non-broadcast viewing on the TV screen continues to increase

Although people in Scotland are watching less broadcast television overall, they are spending slightly more time watching catch-up and recorded viewing up to seven days after broadcast, with average minutes per person per day increasing slightly by two minutes year on year to 31 minutes in 2018.

Viewing of non-broadcast services on the TV set (such as streaming services like Netflix and Amazon Prime Video, or gaming) increased by eight minutes a day in 2018, to 48 minutes per person per day. This increase did not totally offset the overall decline in use of the television set, which decreased by five minutes to 4 hours 26 minutes.

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



Source: BARB. BBC Scotland area, all individuals (4+). * Note: Unmatched viewing refers to when the TV is in use, but content cannot be audio-matched or otherwise identified. It includes gaming, viewing DVDs/box sets/archives, subscription-video-on-demand (SVoD), 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.

What is public service broadcasting?

Public service broadcasting (PSB) is currently provided in Scotland by the BBC, Channel 4 Corporation (C4C), STV, ITV and Channel 5. While all of 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 Two 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. The analysis relates to 2018 and the preceding years and does not include the recently launched BBC Scotland channel.

More than half of all broadcast TV viewing in Scotland in 2018 was to the main five PSB channels

In 2018, the main five PSB channels accounted for a combined 53.6% share of the total broadcast TV audience in Scotland – the highest of the UK nations. BBC One, STV/ITV and Channel 5 had slightly larger shares of viewing in Scotland than the UK averages. For context, there are more than 270 BARB-reported channels in the UK, available to view via digital terrestrial television, satellite, cable and other platforms.

Figure 5: Percentage share of total TV viewing in the nations of the UK for the five main PSB channels: 2018



Source: BARB. BBC areas, all individuals (4+). Channels include HD variants but exclude +1 channels.

BBC Scotland channel launches

BBC Scotland launched on 24 February 2019, kicking off a nightly broadcast which runs from 19:00-00:00. The centrepiece of the channel is a nightly hour of news – *The Nine* – which covers stories from across Scotland, the UK and the world five nights a week. An initial budget of £32m has been dedicated to the new channel.¹³

Across the first four months of broadcast, the channel had a viewing share of 2.7% in Scotland during its broadcast hours. This placed it behind only the main five PSB channels in Scotland. Among the difficult-to-reach 16-34 demographic, the channel's share was 2.3% in Scotland during its broadcast hours. This put it behind the main five PSB channels, ITV2 and E4.¹⁴

The BBC Scotland channel is available in HD on channel 115 on Freeview/YouView/Sky, 106 on Freesat and 108 on Virgin Media, as well as on SD on Freeview's channel 9. Viewers across the rest of the UK can view the channel through BBC iPlayer where much of the programming is available on catch-up.

A new future for public service broadcasting

In June 2019, Ofcom announced a range of measures to ensure that public service broadcasters (PSBs) continue to deliver high-quality content for UK viewers and listeners.

PSB has been a powerful cultural force for more than 80 years, and remains central to innovation and investment in broadcasting, helping to underpin the UK's wider creative economy.

But public service broadcasting is now at a crucial juncture, as broadcasters face competition from global on-demand and internet services such as Netflix, Amazon Prime Video and YouTube.

- So Ofcom has set out a package of measures, including recommendations to government, to support PSB now and in the years ahead. These include:
- updating rules to ensure that traditional PSB TV channels are prominent and easy to find within programme guides;
- making recommendations to government for new legislation to help ensure that PSB programmes and players are also clearly visible on internet-connected devices, such as smart TVs, set-top boxes and streaming sticks;
- endorsing a range of commitments by ITV, Channel 4 and Channel 5 to increase their focus on high-quality children's programmes; and
- launching **Small Screen: Big Debate** – a national forum to discuss the future of public service broadcasting on TV and online. This will call for Parliament, regulators, broadcasters and viewers to be involved in developing a new framework for public service media in future.

¹³ <https://www.bbc.co.uk/mediacentre/latestnews/2019/highlights-new-bbc-scotland-channel>

¹⁴ Source: BARB. BBC Scotland area. Channels include their +1 channels where appropriate

Still Game was the most-viewed programme in Scotland in 2018

The second episode from the eighth and penultimate series of *Still Game* was the most-viewed programme in Scotland in 2018.

Three of the top 20 most-viewed programmes in 2018 were shown only in Scotland. *Hogmanay Live* was ninth, while Hogmanay staple *Only an Excuse?* was the 11th most popular programme; both were on BBC One Scotland. At 16th, the BBC's *Reporting Scotland* from 28 February proved popular as viewers looked for the latest weather updates as the 'Beast from the East' caused mass disruption.

Four of the top 20 programmes were broadcast on STV/ITV, including two World Cup games, while the only Channel 4 programme to make the top 20 was *The Great British Bake Off*.

Figure 6: Top 20 most-watched programmes in Scotland: 2018

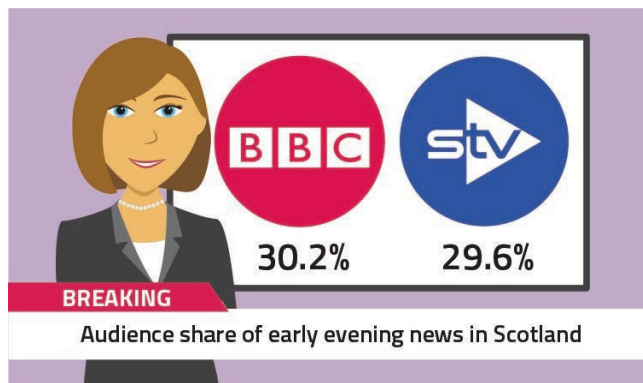
Rank	Programme Title	Channel	Date	Average 000s	% TVR	% Share
1	Still Game	BBC One Scotland	15/03/2018	1,373	28.3	55.8
2	Bodyguard	BBC One Scotland	23/09/2018	1,296	26.4	56.1
3	World Cup 2018: Cro V Eng	STV/ITV	11/07/2018	1,260	25.8	61.1
4	Strictly Come Dancing: The Final	BBC One Scotland	15/12/2018	1,224	24.7	60.2
5	I'm A Celebrity - Get Me Out Of Here!	STV/ITV	22/11/2018	1,184	23.9	52.7
6	World Cup 2018: Tun V Eng	BBC One Scotland	18/06/2018	1,162	23.8	57.6
7	Strictly Come Dancing	BBC One Scotland	24/11/2018	1,124	22.7	53.2
8	World Cup 2018: Col V Eng	STV/ITV	03/07/2018	1,070	21.9	56.6
9	Hogmanay Live	BBC One Scotland	31/12/2018	994	20.0	55.0
10	World Cup 2018: Swe V Eng	BBC One Scotland	07/07/2018	958	19.6	74.2
11	Only An Excuse?	BBC One Scotland	31/12/2018	953	19.2	52.9
12	Strictly Come Dancing: The Results	BBC One Scotland	18/11/2018	950	19.1	45.2
13	Six Nations: Scotland V England	BBC One Scotland	24/02/2018	948	19.6	55.3
14	World Cup 2018: Fra V Cro	BBC One Scotland	15/07/2018	915	18.7	54.7
15	World Cup 2018: Fra V Bel	BBC One Scotland	10/07/2018	910	18.6	45.4
16	Reporting Scotland	BBC One Scotland	28/02/2018	902	18.6	40.7
17	World Cup 2018: Bra V Bel	BBC One Scotland	06/07/2018	901	18.4	49.8
18	Coronation Street	STV/ITV	22/01/2018	898	18.4	42.9
19	The Great British Bake Off	Channel 4	30/10/2018	890	18.1	37.5
20	Shetland	BBC One Scotland	20/03/2018	887	18.3	41.8

Source: BARB. BBC Scotland area, all individuals (4+). The TVR (television rating) is the measure of the popularity of a programme, daypart, commercial break or advertisement by comparing its audience to the population as a whole. One TVR is numerically equivalent to 1% of a target audience.

BBC One and STV's early evening news bulletins each reach around three in ten viewers every night

Reporting Scotland, BBC One Scotland's early-evening news bulletin, attracted a 30.2% share of the slot's viewing in Scotland, slightly lower than in 2017 (30.9%). STV's counterpart, *STV News at Six*, attracted a lower share at 29.6% (26.4% in 2017) albeit higher than the Channel 3 UK average share (22.9%) for the slot.¹⁵

Figure 7: Audience share of BBC One Scotland and STV early evening news: 2018



Source: BARB. All individuals (4+). Note: Early evening ('local') news bulletin figures based on 'regional news' BARB genre programmes, start time 17:55-18:35, 10mins+ duration, weekdays and include the HD and +1 channels where applicable. BBC One's early evening news bulletin, *Reporting Scotland*, is transmitted between 18:30-19:00 and based on BBC areas. STV's *News at Six* is transmitted between 18:00-18:30 and is based on ITV areas.

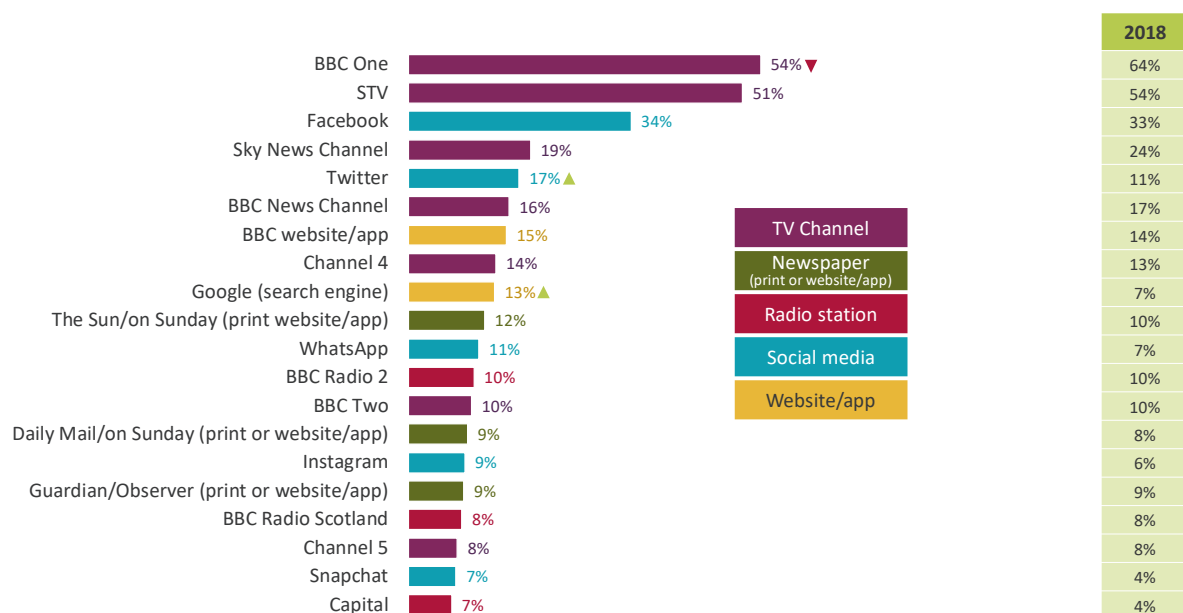
¹⁵ Source: BARB. Individuals (4+). UK averages based on share to respective early-evening news bulletin time slots. STV news is based on BARB's ITV Scotland area, and therefore excludes viewing to *ITV's News Lookaround* in the BARB ITV Border area that includes part of Scotland and part of England. *ITV News Lookaround* had an average share of 47% in all of the BARB ITV Border area in 2018.

BBC One and STV are the most-used sources of news for people in Scotland

Television remains the most-used platform for news consumption for people in Scotland, with BBC One and STV coming first and second in the list of most-used news sources. Television channels, which include Sky News, the BBC News Channel and Channel 4, make up five of the top ten most-used news sources in 2019.

Online sources including social media platforms also feature strongly in the most-used news sources list; Facebook, Twitter, the BBC website/app, Google search engine and the Sun/Sun on Sunday website/app make up the rest of the top ten.¹⁶

Figure 8: Top 20 sources of news in general in Scotland: 2019



Source: Ofcom News Consumption survey 2019.

Question: Thinking specifically about <platform>, which of the following do you use for news nowadays?

Base: All adults 16+ in Scotland – 2019=551, 2018=540. Green/red triangles indicate statistically significant differences between 2019 and 2018. Green/red triangles indicate statistically significant differences between 2018 and 2019.

¹⁶ Ofcom News Consumption survey 2019

STV is the most-used source of news for people in Scotland looking for news about their own nation

In terms of news *about their own nation*, the main TV channels, STV and BBC One Scotland, and Facebook, are the main sources of news for people in Scotland. Nearly half of adults (44%) use STV while slightly less (39%) use BBC One. A fifth of adults (19%) say they use Facebook to get news about their nation.¹⁷

Figure 9: Sources used to access news about own nation: 2019

England		Scotland		Wales		Northern Ireland	
BBC One	39% ▼	STV	44%	BBC One	44% ▼	UTV	52%
ITV	22%	BBC One	39% ▼	ITV WALES	35%	BBC One	50% ▲
Facebook	15%	Facebook	19%	Facebook	25% ▲	Facebook	25%
BBC website/app	8%	BBC website/app	7%	South Wales Echo	12%	BBC Radio Ulster	20% ▲
BBC News Channel	5%	Twitter	6%	The Western Mail	6%	Cool FM	15%
Twitter	4%	BBC Radio Scotland	6%	BBC website/app	5%	The Belfast Telegraph	5%
BBC local/regional radio station	4%	The Sun	6%	Any Wales based news site/app	5%	Twitter	5%
Google (search engine)	4%	The Daily Record	5%	Local daily newspaper	5%	RTE Channels / Virgin Media One / TG4	5%
		Local commercial radio station	4%			BBC Radio 1	5%
		Google (search engine)	4%			Local commercial radio station	4%
						The Irish News	4%
						Sunday Life	4%
Don't follow Nation news	12%	Don't follow Nation news	4%	Don't follow Nation news	7%	Don't follow Nation news	2%

Source: Ofcom News Consumption survey 2019.

Question: From which of the following sources do you get news about what is going on in your nation nowadays? Base: All adults 16+ using TV/newspapers/radio/internet/magazines for news. Scotland=544. Green/red triangles indicate statistically significant differences between 2018 and 2019.

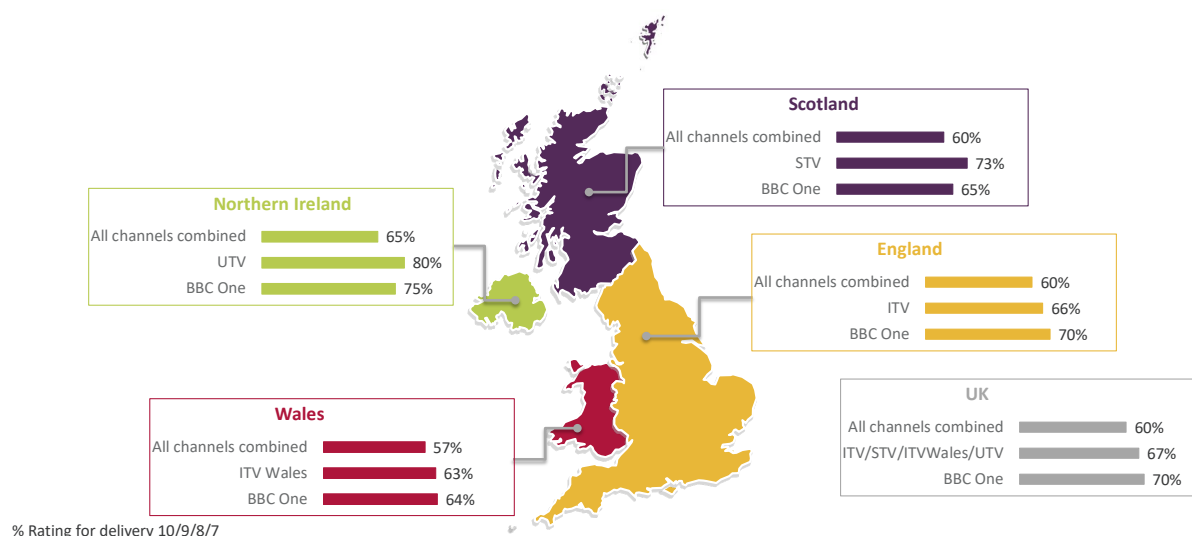
¹⁷ Ofcom News Consumption survey 2019

How viewers in Scotland rate PSB services

About three-quarters of PSB viewers in Scotland were satisfied with PSB provision in 2018 (73%). This compares with 74% for the UK average, 74% in England, 74% in Wales and 77% in Northern Ireland.¹⁸

In terms of regional news provision, audiences in Scotland rated STV (73%) higher than BBC One (65%).¹⁹

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



Source: Ofcom PSB tracker 2018. Q16 - Extent to which the channel is rated as 7-10 out of 10 in relation to the following statement - *Its regional news programmes provide a wide range of good quality news about my area*
 Base for individual channels: Self-reported viewers of each in each nation (BBC One = 2069, 1411, 211, 230, 187; ITV1 = 1776, 1211, 192, 188, 185). Base for 'All channels combined': All respondents who ever watch any PSB channels in each nation (2780, 1944, 274, 283, 279).

When asked about PSBs' delivery of 'showing different parts of the UK, including England, Northern Ireland, Scotland and Wales', 55% of viewers in Scotland rated this highly, compared to 63% of viewers in Northern Ireland, 55% in England and 52% in Wales.²⁰

Less than half of audiences in Scotland (45%) rated the performance delivery of 'It portrays my region/nation fairly to the rest of the UK'. However, this was rated relatively low across all the nations: England (47%), Northern Ireland (44%) and Wales (43%).²¹

In terms of representing diversity in the nations, 58% of audiences in Scotland rated highly the delivery of 'programmes that show different kinds of cultures within the UK'. This compared to 57% in England, 56% in Wales and 51% in Northern Ireland.²²

¹⁸ Ofcom PSB Tracker 2018

¹⁹ Ofcom PSB Tracker 2018

²⁰ Ofcom PSB Tracker 2018

²¹ Ofcom PSB Tracker 2018

²² Ofcom PSB Tracker 2018

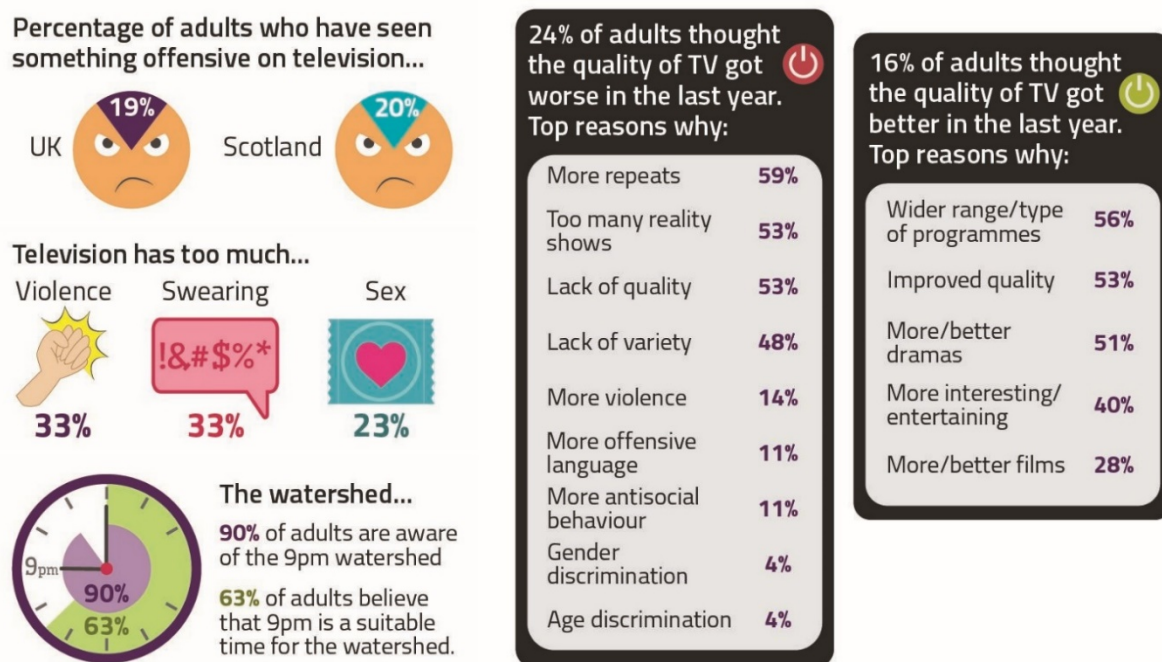
Attitudes to TV in Scotland

One of Ofcom's duties under the Communications Act 2003 is to ensure that people who watch television and listen to the radio are provided with appropriate protection from harmful or offensive material. The annual Ofcom cross-platform media tracker survey looks at attitudes to offensive language, sex and violence.

Among viewers in Scotland, there is no difference in their feelings about sex, swearing and violence on TV compared to the UK overall.

When asked if they felt that TV programmes had improved, got worse or stayed the same in the last 12 months, a quarter of viewers in Scotland (24%) said it had got worse, similar to the UK overall (23%).²³

The reasons given for saying this were: more repeats (59%), general lack of quality, too many reality shows and lack of variety (all at 53%).²⁴



Source: Ofcom cross-platform media tracker 2018. Base: All with any TV sets in 2018; UK (2321), Scotland (254)

²³ Ofcom cross-platform media tracker 2018

²⁴ Ofcom cross-platform media tracker 2018



TV programming for and from Scotland

Introduction

The BBC, STV and ITV provide programming specifically for viewers in Scotland across a range of genres, but most notably news and current affairs output.

Both spend in real terms, and hours of content produced by the BBC and STV/ITV for viewers in Scotland, were down slightly in 2018; total spend was £53.3m.

Spend by STV/ITV was down by £0.5m to £10m, a fall of 4.7%, while spend by the BBC was £1.1m lower at £43.3m, a fall of 2.4% since 2017. News programming declined by 5.8% in real terms, following a year with a general election in 2017.

STV and ITV's combined first-run UK-originated hours in Scotland were 11 hours lower in 2018, at 975 hours, while the BBC produced 740 hours of first-run Scottish content in 2018, also down by 11 hours since 2017.

Scotland is an important source of production for PSB content shown across the UK. Just under 8% of qualifying network content across the PSB channels was produced in Scotland in 2018, on par with the previous year. The percentage of network content hours produced in Scotland by the BBC rose in 2018, but fell at Channel 4, ITV and Channel 5.

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.

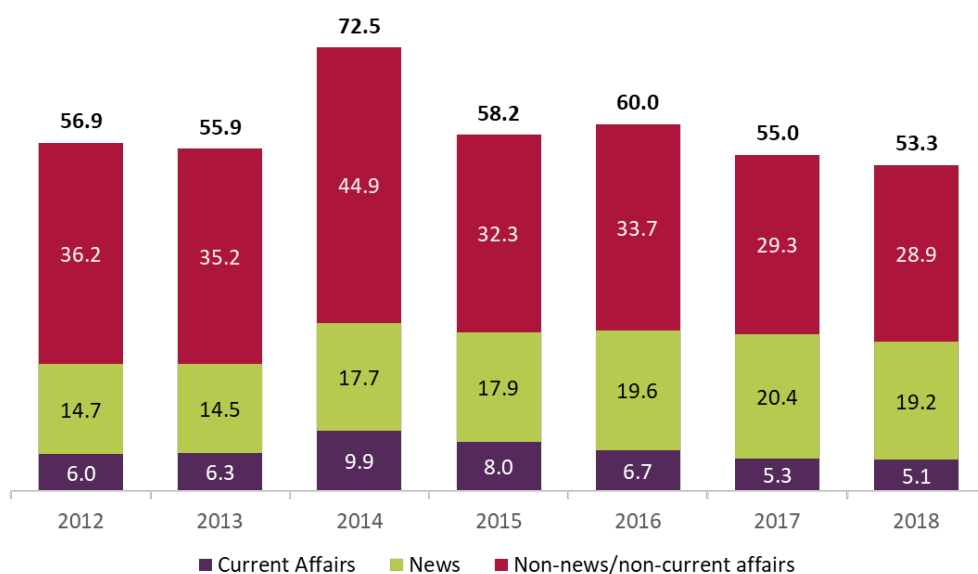
Spend on this content includes all costs incurred by the broadcaster associated with making programmes. These include both direct and indirect production costs for in-house productions, and licensing costs for commissioned programmes, but exclude costs related to marketing and distribution. All spend figures are in **real terms**, which mean they are adjusted for inflation using the consumer price index (CPI) and are listed in 2018 terms.

PSBs' combined spend on programming for Scotland declined by 3% in 2018, led by a decrease in spend on news content

In real terms, spending declined in 2018 on new content for viewers in Scotland, at £53.3m combined across BBC, STV and ITV.

The largest decline was in news programming, which fell by 5.8% from £20.4 in 2017 to £19.2m in 2018.

Figure 11: PSB spend on first-run UK-originated content for Scotland, by genre (£m)

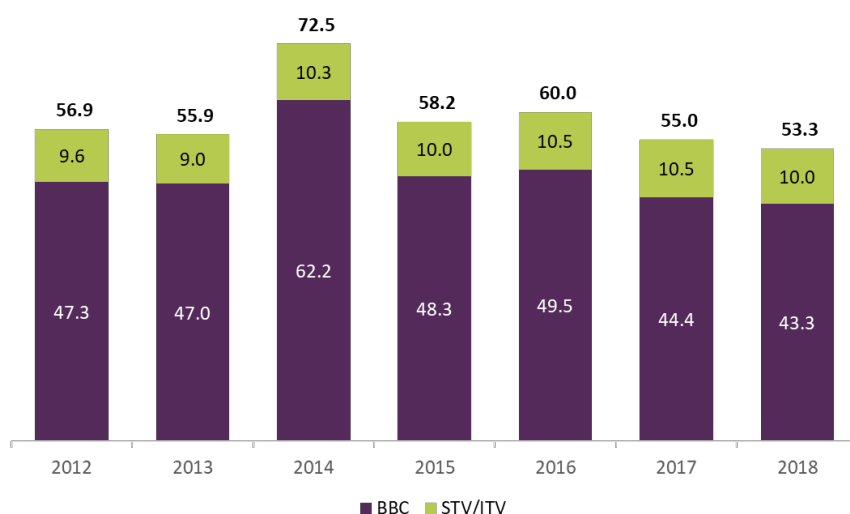


Source: Ofcom/broadcasters. Note: Figures are expressed in 2018 prices. Note: excludes BBC Alba.

The decrease in first-run spend is driven by both BBC and STV/ITV

Combined STV/ITV real terms spending was £0.5m (4.7%) lower in 2018 than in the previous year. The BBC's spend on content for Scotland also decreased, dropping to £43.3m for BBC One Scotland and BBC Two Scotland combined. This represents a smaller 2.4% decline in spend but a larger decline of £1.1m in monetary terms.

Figure 12: BBC and STV/ITV spend on non-network first-run UK-originated content for Scotland (£m)



Source: Ofcom/broadcasters. Note: Figures are expressed in 2018 prices. Note: excludes BBC Alba.

Local programming requirements / commitments

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

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

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

The BBC, through its operating licence which came into effect on 1 January 2018, must also fulfil regulatory conditions specific to Scotland.

Among other things, this operating licence stipulates that in each financial year the BBC must ensure that:

- in respect of **BBC One Scotland** and **BBC Scotland** taken together, the BBC must provide a range of genres in its programming that reflect Scotland's culture;
- in respect of **BBC One Scotland**, at least 290 hours must be allocated to news and current affairs programmes; and at least 155 hours to non-news programmes; and

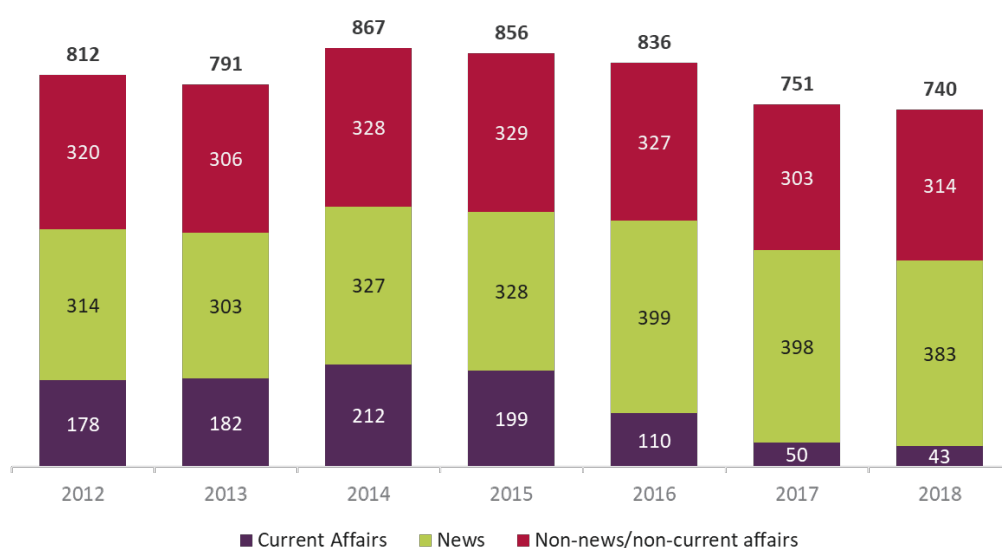
- in respect of the **BBC Scotland** channel,
- there must be at least 212 hours of news shown in peak viewing time in 2019 (and 250 hours after 2019);
- at least 90% of first-run UK originations must be made in Scotland; and
- the BBC must ensure a suitable range of programmes, including news programmes which contain news from across Scotland or reflecting a Scottish perspective.

BBC hours of first-run content for Scotland fell marginally in 2018

In 2018, the 740 hours of first-run Scottish content represented a decline of 11 hours on 2017. The biggest fall by genre was in current affairs, with the BBC broadcasting 43 hours of first-run current affairs programming in Scotland in 2018, a 14% decrease on 2017.

Additionally, BBC first-run news content in Scotland has decreased by 3.7% since 2017. In 2018, non-news and non-current affairs programming increased by 11 hours compared to 2017.

Figure 13: BBC hours of first-run UK-originated content for Scotland (BBC One and BBC Two), by genre



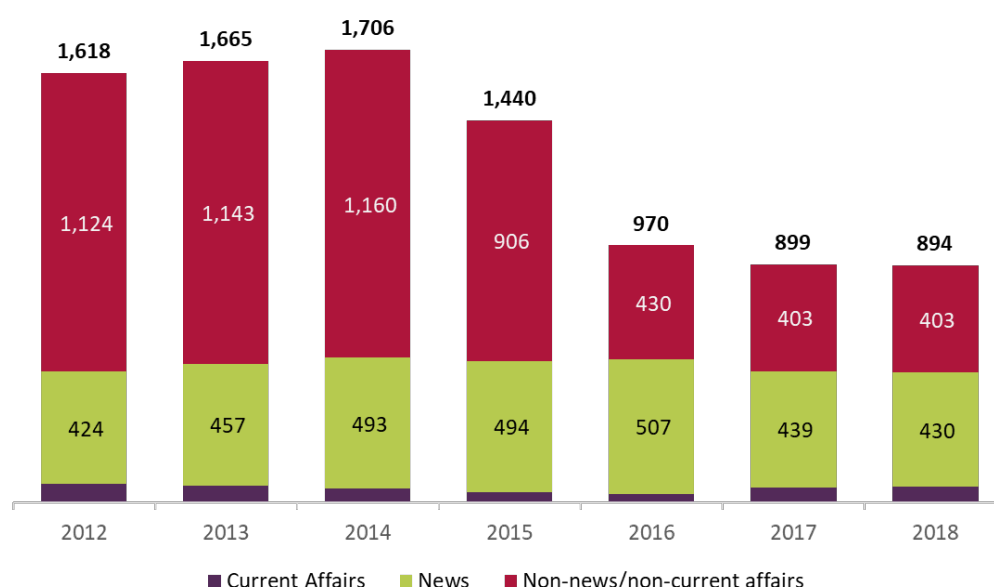
Source: Ofcom/broadcasters. Note: excludes BBC Alba.

STV's first-run UK-originated hours in Scotland remained steady in 2018 at 894 hours

First-run hours of news programming made up 430 hours of the total, a 2% decrease on 2017, while current affairs increased by 5% to 61 hours.

In 2018, ITV broadcast 81 hours of first-run current affairs content specifically for viewers in the south of Scotland; down from 87 hours in 2017.

Figure 14: STV hours of first-run UK-originated content for Scotland, by genre



Source: Ofcom/broadcasters.

Channel 4 to set up a creative hub in Glasgow

In October 2018, Channel 4 announced that Glasgow would be home to one of its new creative hubs, alongside the new national HQ in Leeds and another creative hub in Bristol. More than 30 bids were made by cities and regions across the UK for the three new offices, with Glasgow's "well established and vibrant independent production sector" a factor in Channel 4's decision.

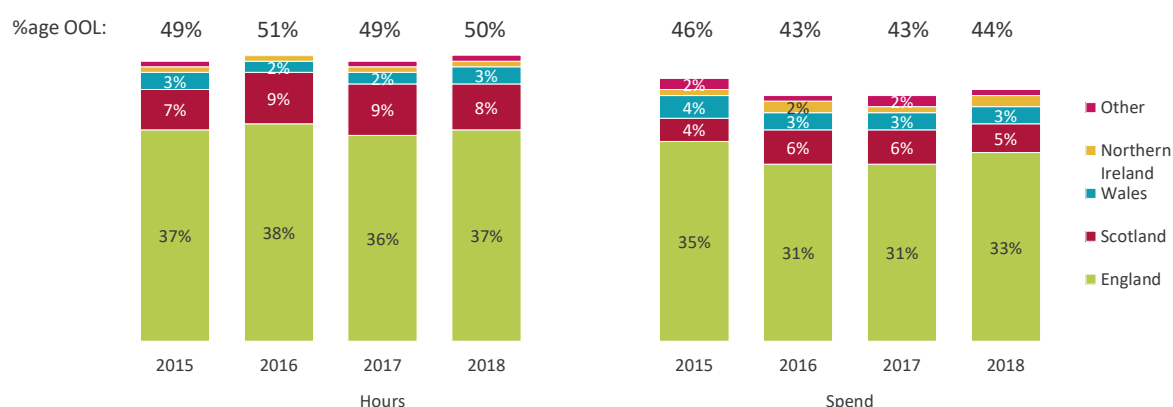
It is hoped that the new Glasgow base will also allow for stronger partnerships with the production sector in Northern Ireland, an increase in on-screen representation and the opportunity to work more closely with educational partners in the area to nurture young talent. The new office will open later in 2019, with entertainment and live events, factual, news and current affairs and popular factual among the genres that will have a commissioning presence in Glasgow.

Just under 8% of qualifying network content across the PSB channels were Scotland-based productions in 2018

Public service broadcasters have to make programmes that are broadcast for the first time on their network TV channels in a range of places around the UK that are not London. The broadcasters have quotas relating to this, in terms of the proportion of qualifying hours that must be made outside London, and the proportion of qualifying spend that has to be outside London. The BBC has individual quotas for each of the UK nations, which came into effect this year, and Channel 4 also has an out-of-England quota²⁵.

²⁵ For further information, see the [PSB compliance pack](#) and the [regional programming guidance](#)

Figure 15: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2015-2018



Source: Ofcom / broadcasters.

BBC hours and spend on networked programming from Scotland increased in 2018

The BBC remains the broadcaster with the largest proportion of its qualifying network hours and spend being assigned to Scotland, helped by its long-running daytime strand *Homes under the Hammer*, new drama commissions such as *The Cry* and its coverage of the major snooker tournaments each year.²⁶

The proportion of Channel 4's qualifying hours and spend for Scotland fell in 2018. This was driven by the absence of *Man Down* and *Eden* on the network, both of which were assigned to Scotland in 2016 and 2017.

Figure 16: Proportion of qualifying network production in Scotland, by PSB: 2015-2018

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

Source: Ofcom/broadcasters. Note: Figures do not include network news production.

²⁶ Ofcom published revised guidance on regional TV production in June 2019, bringing more rigour and accountability to the regional production regime. Full details can be found at https://www.ofcom.org.uk/data/assets/pdf_file/0024/152466/statement-review-of-regional-tv-production-and-programming-guidance.pdf

STV Productions increases network output

One of STV's strategic aims for creative and digital growth in 2018 was for STV Productions to become one of the UK's leading production companies.²⁷ In 2018, STV Productions increased its year-on-year revenue by 60%, to £16.3m and has secured more than 60% of its 2018 revenue in the first quarter of 2019 alone.

This growth has been made possible by a series of recommissions from the BBC for *Antiques Road Trip* and *Celebrity Antiques Road Trip*, as well as STV's first BBC drama commission, *The Victim*. Broadcast across April 2019 on BBC One, *The Victim* proved to be particularly popular on the BBC iPlayer, with the average audience for the series increasing by 82% across all platforms in the seven days after transmission, with episode one viewed by more than 7.2 million people.²⁸

Spending by BBC Alba on first-run UK-originated content increased by £1m to £16.7m in 2018

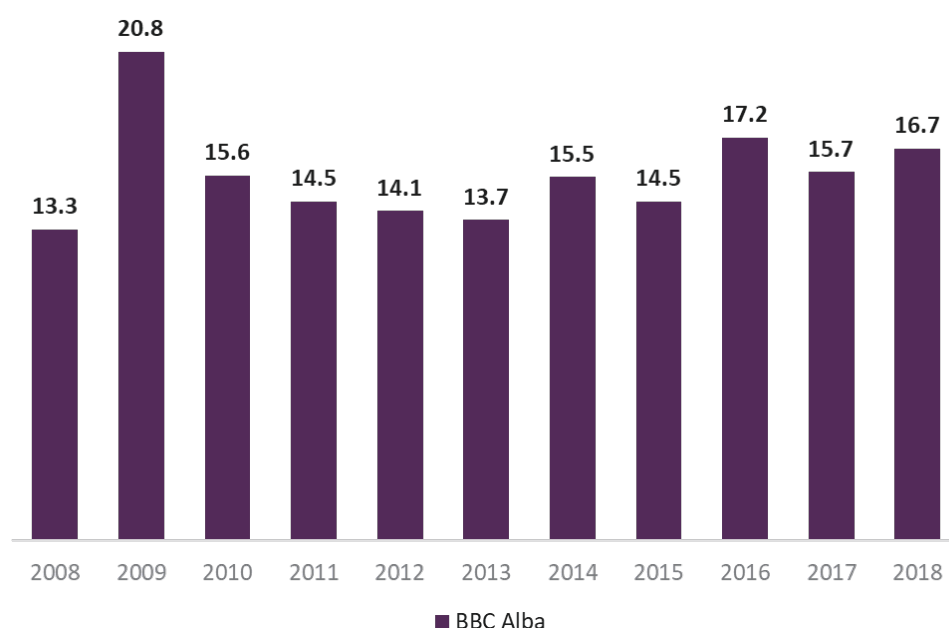
BBC Alba broadcast 650 hours of first-run content in 2018, a similar amount as in 2017 (648 hours). Despite the similar number of hours, spending rose by 6.3% on 2017, with approximately £1m of additional first-run UK-originated spend, bringing 2018 spend to £16.7m. The growth in first-run spend for BBC Alba is partly from increased investment in content, including weekend news broadcasts and comedy programmes such as the sketch show *Func*.

2018 had the third-highest recorded spend by BBC Alba, in real terms, since its launch in 2008: in 2016 its spend was £17.2m and 2009 it was £20.8m.

²⁷ <http://www.stvplc.tv/blog/2018/05/stv-sets-out-strategy-for-creative-and-digital-growth>

²⁸ <https://www.stvplc.tv/blog/2019/05/stv-productions-drama-the-victim-breaks-catch-up-viewing-records>

Figure 17: BBC Alba spend on first-run UK-originated content (£m)



Source: Ofcom/broadcasters. Note: figures are expressed in 2018 prices.

Screen Scotland aims to boost Scotland's production sector

In August 2018, Screen Scotland was launched to promote and develop Scotland's screen sector. Screen Scotland's Broadcast Content Fund allocates money to TV projects in all genres, giving priority to productions which have the potential to generate lasting benefits to build companies of scale; to reflect or promote Scottish culture, creativity and diversity; and to offer significant opportunities to people currently under-represented in the screen sector.

The fund had an initial allocation of £3m for 2018/19; this money has so far been used to support drama productions from Blazing Griffin, factual productions from Caledonia TV and returning series from Firecrest Films.

Screen Scotland sits within Creative Scotland and is a partnership between Scottish Enterprise, Highlands and Islands Enterprise, Skills Development Scotland and the Scottish Funding Council, with funding from the Scottish Government and the National Lottery.



Radio and audio

Introduction

Radio remains popular across the UK and in Scotland, where more than eight in ten adults listen to the radio each week, tuning in for nearly 20 hours every week.

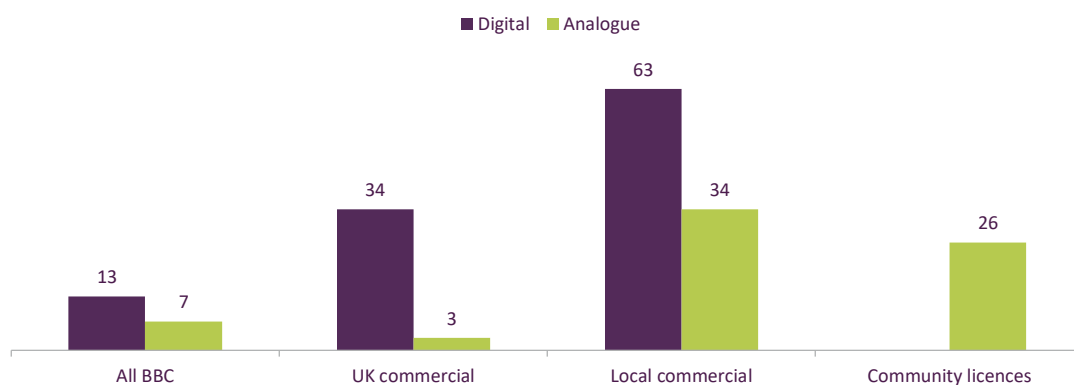
It has been a big year for digital radio in Scotland. For the first time, digital listening has accounted for more than half of all listening (55.1% in Q1 2019), up from 46.9% in 2018 and only slightly lower than the UK-wide figure of 56.4%. More than two-thirds of adults in Scotland (70%) owned a DAB radio at the end of Q1 2019, higher than in any other UK nation.

Meanwhile, ownership of smart speakers, with uses including streaming music and listening to live radio, has increased to a fifth (21%) of households.

There were 110 stations broadcasting on DAB in Scotland in March 2019

This compares with fewer than 70 stations that were broadcasting on DAB five years ago.²⁹ There are now 70 stations broadcasting on analogue, including 26 community radio stations.

Figure 18: Radio station availability in Scotland



Source: BBC / Ofcom, March 2019

Note: This chart shows the maximum number of stations available; local variations and reception issues mean that listeners may not be able to access all of them. The local commercial digital figure refers to the number of services carried by local DAB multiplexes in Scotland. Not all services will contain local content, and some services may be broadcast on a number of different multiplexes (but are still counted for these purposes as individual services).

²⁹ There may be some duplication in the services counted here where services broadcast on more than one Scottish local multiplex

Community radio expands

A number of new community radio stations have launched across Scotland in recent months including Buchan Radio (Peterhead), Paisley FM, Revival FM and Radio Ramadan 365 (both in Glasgow). Over the next year, Caithness FM, Cumbernauld FM and Groove City Radio in Glasgow are set to begin broadcasting, offering further choice for listeners in those communities.

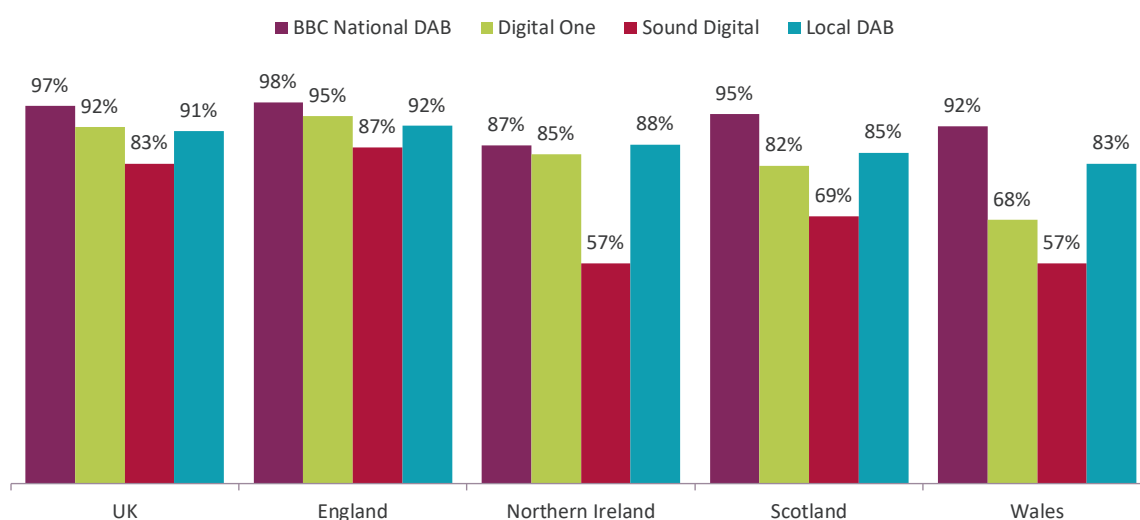
UK-wide BBC services are available to 95% of households in Scotland

Coverage of the majority of radio multiplexes, the transmission infrastructure used to broadcast DAB radio stations, was unchanged in 2019.

However, coverage of the second national commercial multiplex, operated by Sound Digital, increased over the year from 65% to 69% of households in Scotland with the addition of extra transmitters to its network.³⁰

Figure 19: Household coverage of DAB

Proportion of households (%)



Source: BBC, Arqiva, Ofcom, March 2019

More than eight in ten adults in Scotland listened to the radio every week in Q1 2019

The reach of radio in Scotland remained strong in 2019 with more than 85% of adults tuning in every week during Q1. Radio listeners in Scotland listened to an average of 19 hours 42 minutes of radio each week during this period.

³⁰ <https://www.arqiva.com/news/press-releases/sound-digital-announces-imminent-completion-of-dab-radio-network-expansion/>

Figure 20: Average weekly reach and listening hours

	England	Scotland	Wales	Northern Ireland	UK TOTAL
Average weekly listening (hrs:mins)	21:36	19:42	22:12	18:54	20:54
Weekly reach	89.2%	85.1%	90.4%	93.0%	89.4%

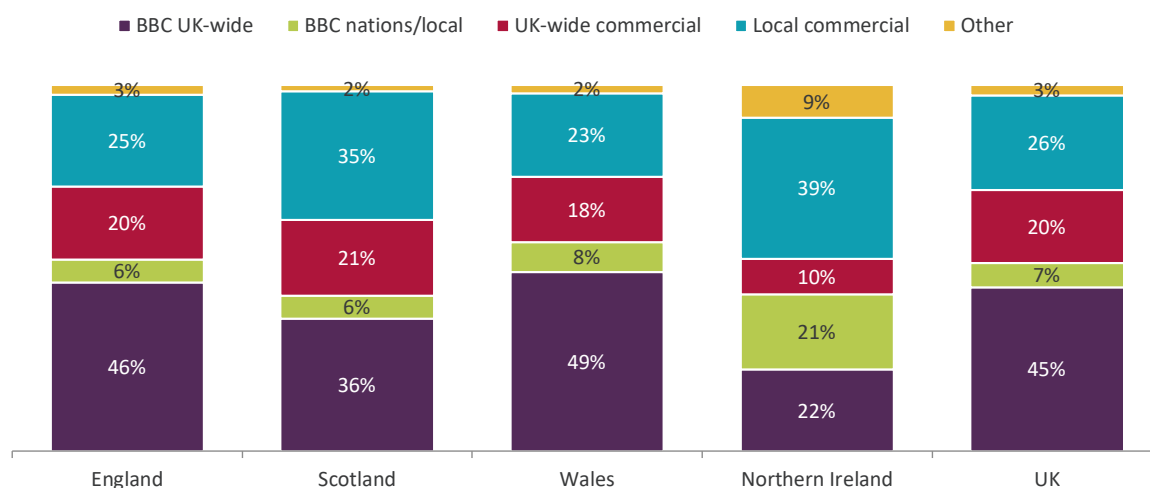
Source: RAJAR, All adults (15+), Q1 2019.

England = BBC Local Radio in England TSA; Scotland = BBC Radio Scotland TSA; Wales = BBC Radio Wales TSA; Northern Ireland = BBC Radio Ulster TSA. Reach is defined as a percentage of the area's adult population who listen to a station for at least 5 minutes in an average week.

Local commercial radio made up nearly 35% of all radio listening in Scotland in Q1 2019

Local commercial radio and BBC Radio Scotland combined accounted for 41% of total listening in Scotland in 2019. Only in Northern Ireland (60%), among the four UK nations, did BBC nations'/local services and local commercial command a higher share of total listening.

Figure 21: Share of listening hours, by nation



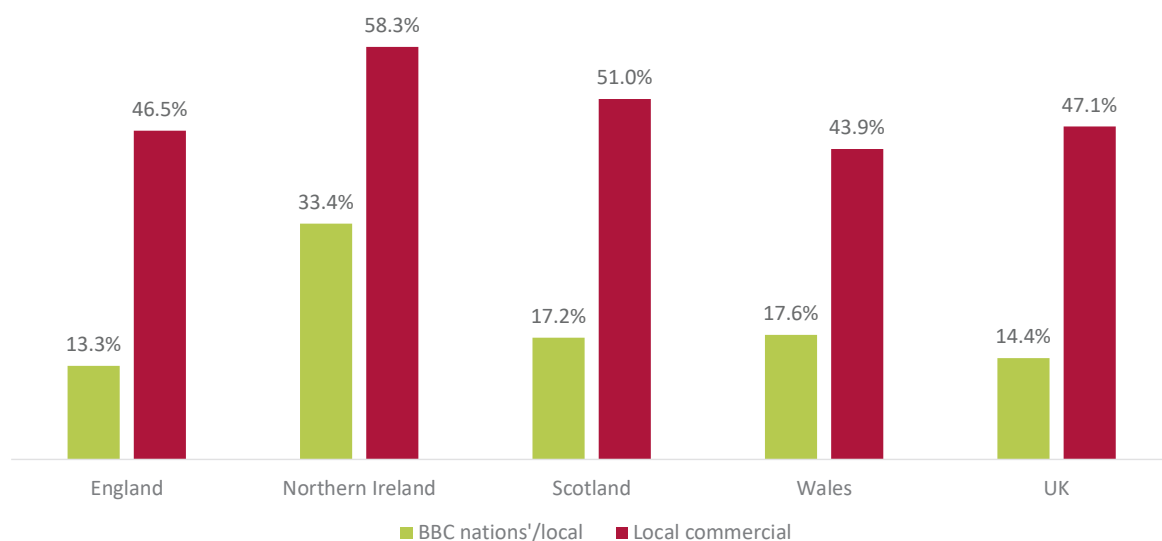
Source: RAJAR, all adults (15+), Q1 2019.

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

In Scotland in Q1 2019 three times as many adults tuned in to local commercial radio every week as to BBC Radio Scotland

Around half of adults in Scotland listened to local commercial stations (51%), with 17% listening to BBC Radio Scotland in Q1 2019. Across the UK, less than half of adults listened to local commercial radio and less than 15% listened to BBC nations'/local stations.

Figure 22: Weekly reach to local radio, BBC vs. commercial



Source: RAJAR, Q1 2019

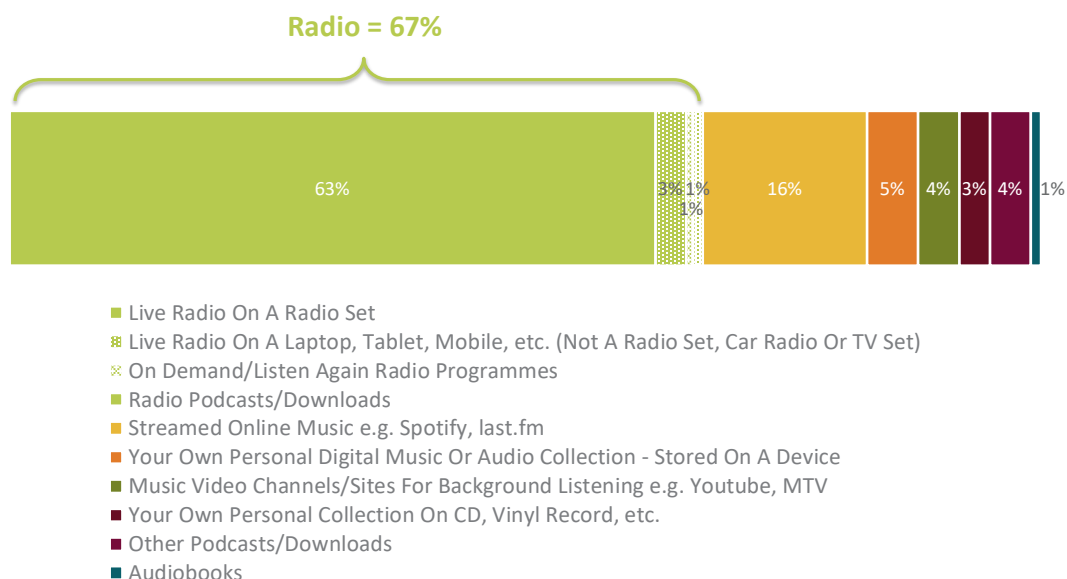
Live radio is the most popular listening activity in Scotland

Of all the time spent each week listening to any type of audio, 67% was to any radio, including live, listen-again and radio podcasts. This is lower than the proportion of time spent on radio across Great Britain (73%).³¹ Adults in Scotland spend more of their listening time on streamed music (16%) compared to adults across Great Britain (12%). This is reflected in the fact that adults in Scotland are more likely than adults in Great Britain (33% vs. 30%) to subscribe to a music streaming service.

³¹ The TouchPoints sample only covers Great Britain and so does not include Northern Ireland

Figure 23: Share of ear, Scotland, age 15+

For adults, the majority of time listening to content is to live radio

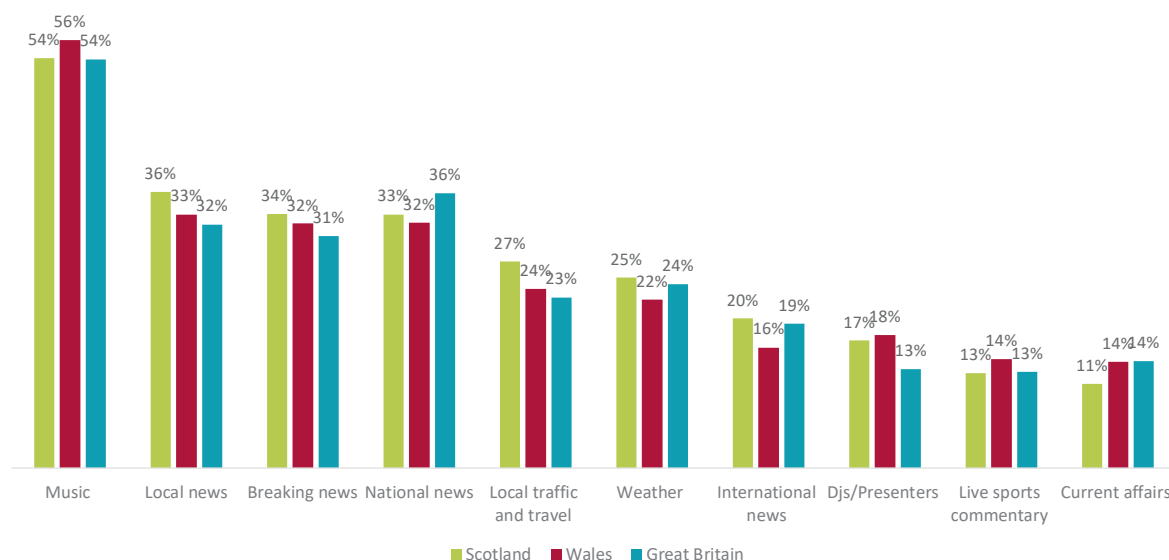


Source: TouchPoints 2018

Base: Government Office Region: Scotland

Music is the most valued type of content for radio listeners across Great Britain, followed by national news. But for listeners in Scotland, local news coverage is the second most valued type of content; it is more likely to be valued by Scotland listeners (36%) than by those in Wales (33%) or across Great Britain as a whole (32%).

Figure 24: Top ten most valued types of content on the radio



Source: TouchPoints 2018

Base: Weekly radio listeners aged 15+

Smart speaker ownership has nearly doubled in the last year

The use of smart speakers has increased in the home, with uses from streaming music and listening to live radio, to accessing weather reports or setting personal alarms. A fifth (21%) of homes in Scotland owned a smart speaker in 2019 – up from 12% in 2018.³²

One in four adults have listened to podcasts and listen-again services

In 2019, respondents were asked if they ever used listen-again services or podcasts from various providers. A quarter (25%) of respondents in Scotland said they ever used these services, lower than the proportion for the UK overall (33%).³³

The services which respondents claimed to have used most in Scotland were from the BBC (17%), along with other UK-based providers (excluding commercial radio) (12%). One in ten (10%) claimed to use either UK commercial radio or non-UK based providers.³⁴

Scotland podcasts

The BBC produces podcasts in Scotland which draw from material broadcast from its nations' radio services, with content in English from Radio Scotland, and Gaelic podcasts from Radio nan Gàidheal. In the latter case, learners of the language can download podcasts designed to help increase their knowledge of the language. In addition to this, BBC Scotland now produces exclusive content only available as a podcast, such as the weekly current affairs show *Podlitical*.

As in Wales and Northern Ireland, news brands including The Herald and The National produce a range of podcasts whose topics include current affairs and sport. Some commercial radio stations such as Clyde 1 also offer podcasts based on programming such as the [Superscoreboard](#) podcast.

Examples of independently-produced podcasts from Scotland include *A Scottish Podcast*, horror/drama podcast, music podcast [Podcart](#) and politics and current affairs podcasts from [Feisty Productions](#).

Scotland has the highest rate of DAB radio ownership in the UK

More than two-thirds of adults in Scotland (70%) owned a DAB radio, either in the home or the car, at the end of Q1 2019. This was higher than in any other UK nation; the average UK ownership figure was 67% in Q1 2019.³⁵

Among radio listeners in Scotland, almost half (47%) had an active DAB radio in the home, no significant difference from 2018.³⁶ One in ten (9%) radio listeners in Scotland who did not have a

³² Ofcom Technology Tracker 2019

³³ Ofcom Technology Tracker 2019

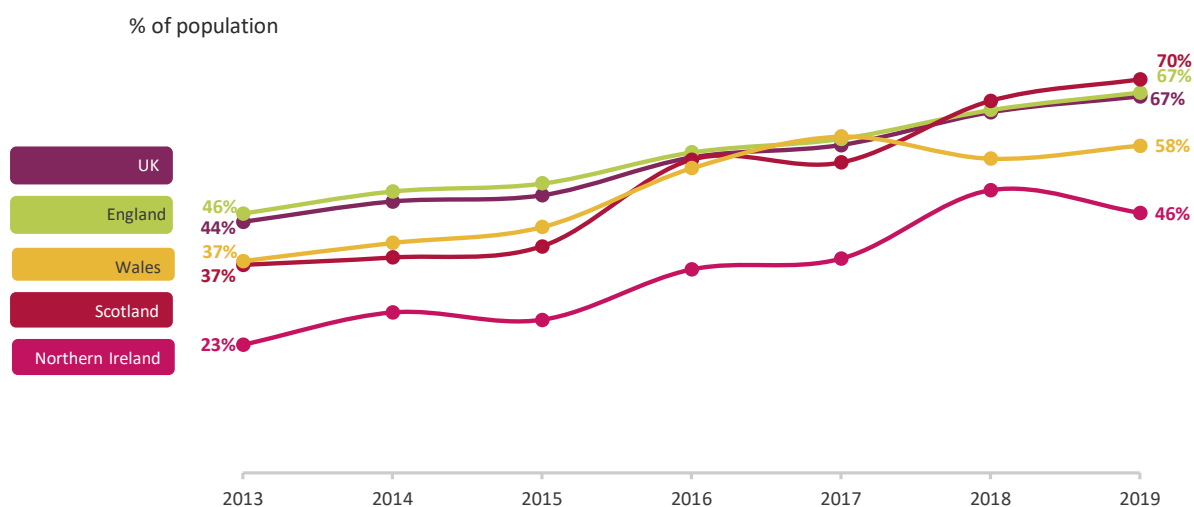
³⁴ Ofcom Technology Tracker 2019

³⁵ RAJAR, Q1 2019

³⁶ Ofcom Technology Tracker 2019

DAB set in the home said they were likely to purchase one in the next 12 months – comparable to the UK overall.³⁷

Figure 25: DAB ownership

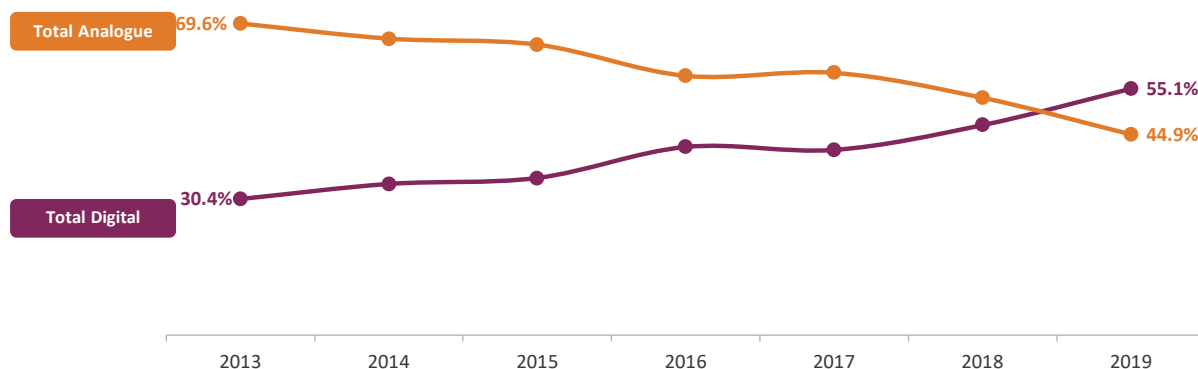


Source: RAJAR, Q1 in each year

Digital listening in Scotland now accounts for more than 50% of all listening

There has been a significant increase in digital listening, through DAB radio, DTT and online (including smart speakers) over the past year. In Q1 2019, digital listening continued to increase its share of total listening, widening the gap with analogue; it reached 50% for the first time in Q3 2018. Digital listening rose by 8.2pp over the year; the biggest increase was through online platforms, up by 25% on the previous year.

Figure 26: Share of listening hours via digital and analogue platforms in Scotland: 2013-2019

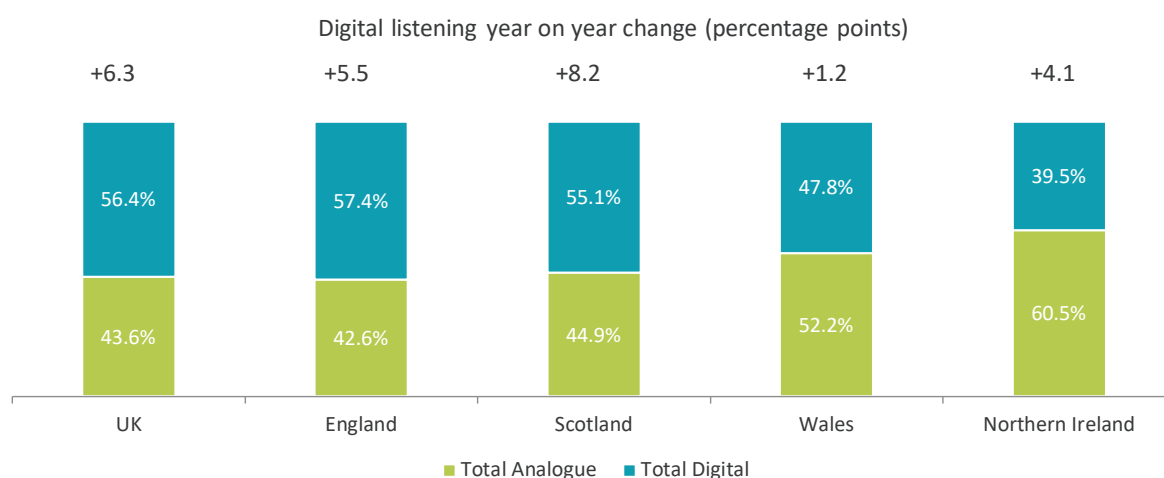


Source: RAJAR, Q1 of each year, BBC Radio Scotland TSA

³⁷ Ofcom Technology Tracker 2019

Scotland now ranks behind only England in digital listening, and ahead of Wales and Northern Ireland, where digital listening is considerably lower at 47.8% and 39.5% respectively.

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



Source: RAJAR, Q1 2019; within the BBC Radio TSA for each nation

Preparing for small-scale DAB

Small-scale DAB is a new way of transmitting digital radio that uses advances in software and low-cost computer technology to provide a flexible and inexpensive approach to the terrestrial broadcasting of digital radio services to a relatively small geographic area.

The concept was first tested by Ofcom engineer Rashid Mustapha in 2012 and subsequently the UK government funded a series of trials, licensed and facilitated by Ofcom, to test the feasibility of the technology. The trials demonstrated that small-scale DAB can provide a robust and reliable means for small analogue stations to broadcast on digital, as well as for entrants wishing to launch new radio services on a digital terrestrial platform.

In July 2019, Ofcom set out how it plans to license small-scale DAB, using new powers the UK government is proposing, through Parliament, to give us. This will enable a significantly wider range of commercial and community radio stations to broadcast on the UK's DAB digital radio platform.

Following the [consultation](#), Ofcom plans to publish a statement early in 2020.

BBC Radio 2 is the most popular radio station in Scotland

BBC Radio 2 was the most listened-to station across Scotland in Q1 2019, with a reach of 25%, followed by BBC Radio Scotland with 17.1%.

While BBC services rank highly for reach across Scotland, in the central belt local commercial stations Capital and Clyde 1 are popular, reaching 18.4% and 17.6% of adults in this area every week, behind BBC Radio 2.

In Aberdeenshire³⁸, Bauer's Northsound 1 is the most popular station, reaching almost two-fifths (37.7%) of adults in the area, while Original 106 is the third most popular station, reaching a quarter of adults.

Figure 27: Top three radio stations, by region

Rank	UK		Scotland*		Central belt**		Aberdeenshire***	
	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)	Station	Weekly reach (%)
1	BBC Radio 2	28.0%	BBC Radio 2	25.0%	BBC Radio 2	20.5%	Northsound 1	37.7%
2	BBC Radio 4	20.1%	BBC Radio Scotland	17.1%	Capital Scotland	18.4%	BBC Radio 2	27.4%
3	BBC Radio 1	17.0%	BBC Radio 1	15.8%	Clyde 1	17.6%	Original 106	25.1%

Source: RAJAR, Q1 2019

* BBC Radio Scotland TSA

** Capital Scotland TSA

Commercial radio developments

In 2019 there have been high-profile programming changes to the schedules of radio stations owned by Global and Communicorp in Scotland. In April, *Capital Breakfast* with Roman Kemp became the new breakfast show on Capital in Scotland, while in June, Amanda Holden and Jamie Theakston became the new hosts of *Heart Breakfast*, with Des Clarke hosting a new programme between 4pm and 7pm during the week. These changes followed the publication in 2018 of Ofcom's revised localness guidelines for local analogue commercial radio stations.

In April 2019, DC Thomson announced further investment in Scotland's commercial radio sector with the purchase of Aberdeenshire's Original 106 and Fife's Kingdom FM. This follows its 2017 acquisition of Wave 102, which broadcasts across Dundee and Perth.

In Glasgow, Nation Radio Scotland posted its first listening figures since it launched, which showed that 50,000 people tuned in during the first quarter of 2019.

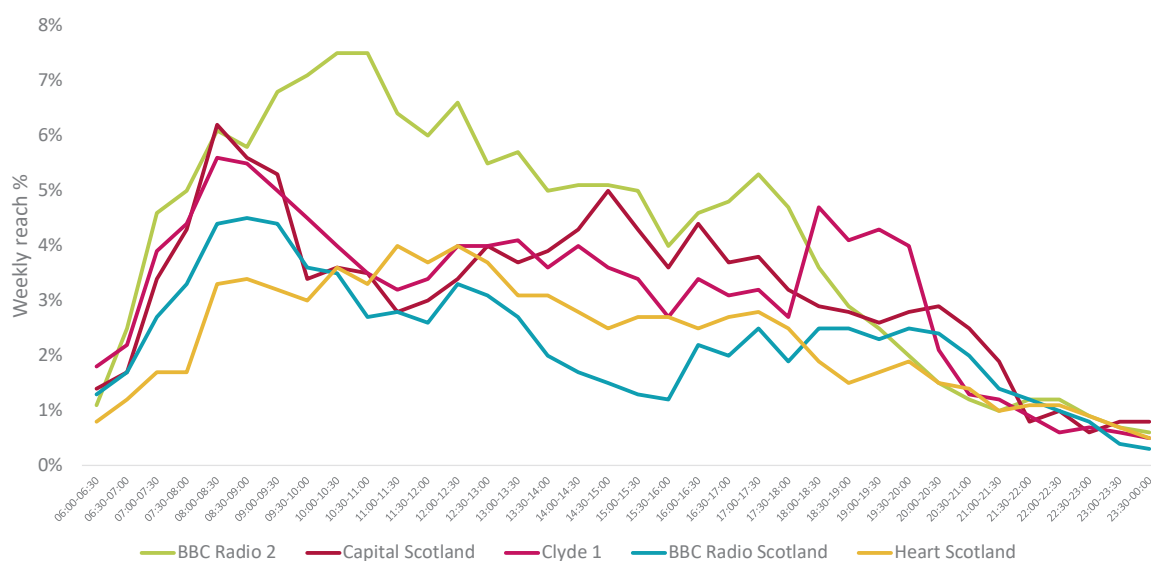
The peak time to listen to the radio during the week in the central belt is between 10am and 10.30am

In the central belt region, peak listening time during the week was between 10am and 10.30am, when the most listened-to programme was BBC Radio 2's *The Ken Bruce Show*. Across its duration, the show³⁹ reached 11% of the central belt region, although this was lower than across the UK (16%).

³⁸ RAJAR's Northsound 1 TSA, with a population of 350,000 adults

³⁹ 09:30-12:00 Monday-Friday

Figure 28: Average audience across the day, central belt region, Mon-Fri

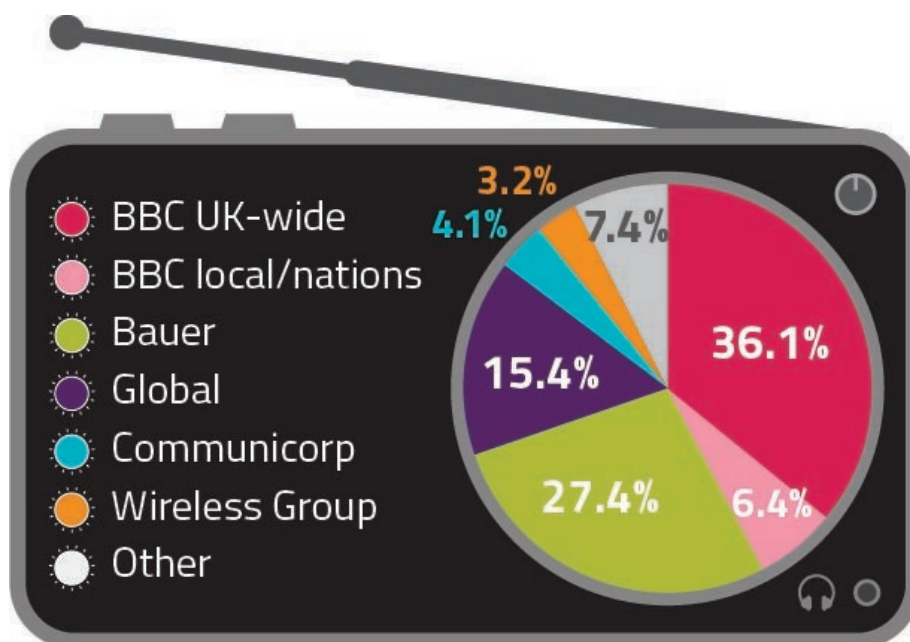


Source: RAJAR, all adults 15+, Q1 2019
Capital Scotland TSA

Bauer stations accounted for more than a quarter of all listening in Q1 2019

In Scotland, the BBC had a 42.5% share of the radio market in Q1 2019. Of the commercial radio groups, Bauer Radio – which owns stations including Forth 1, Clyde 1 and Northsound 1 – has the largest proportion of the market, at 27.4%, followed by Global Radio – the owner of Heart and Smooth – with 15.4%.

Figure 29: Share of listening in Scotland, by radio group

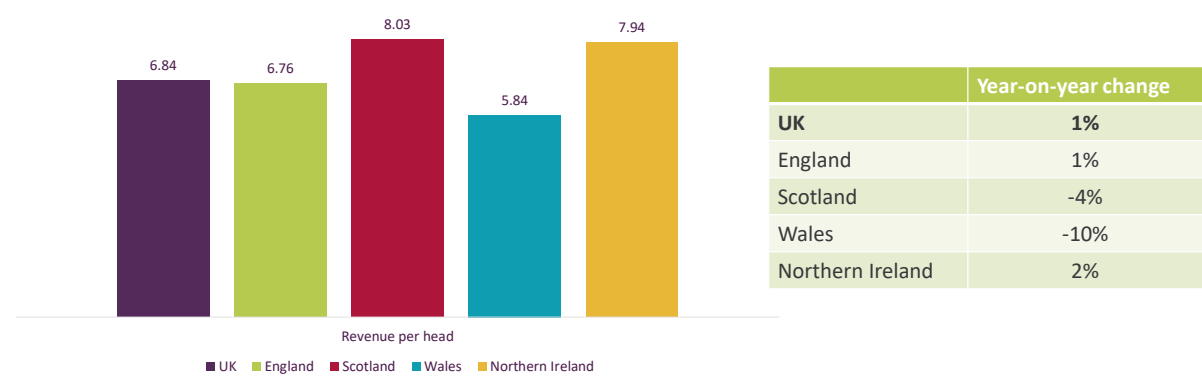


Source: RAJAR, All adults (15+), Q1 2019, BBC Radio Scotland TSA

Commercial radio revenue for local stations decreased by 4% in 2018

Local commercial radio stations in Scotland generated £8.03 per head of population in 2018. This was the highest of the UK nations.

Figure 30: Local / commercial radio revenue per head: 2018 (£)



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