

## 2 Television and audio-visual content

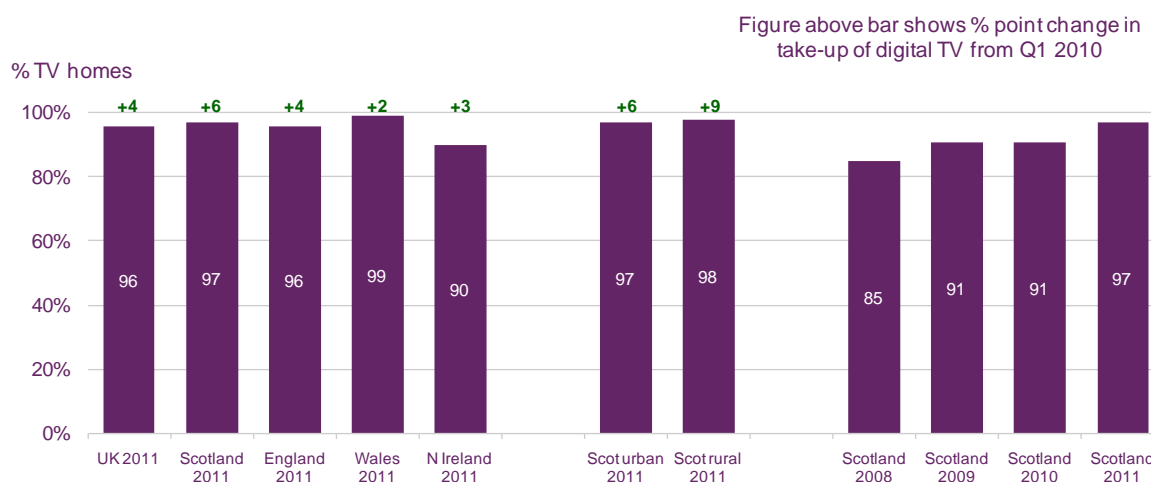
### 2.1 Digital television take-up in Scotland

#### Almost all homes in Scotland now have digital television

A year ahead of the completion of digital switchover in the UK, almost all (97%) TV homes in Scotland now have access to digital television. This increase, of six percentage points from 91% in Quarter 1 2010, includes a nine percentage point increase in Scotland's rural areas. This was driven by digital switchover in Scotland, which was underway at the time the fieldwork was undertaken.

Consumers in Scotland aged 55+ (94%) and in DE socio-economic groups (94%) are a little less likely to have converted to digital television at home.

**Figure 2.1 Digital television take-up in Scotland**



Source: Ofcom research, Q1 2011

Base: All adults aged 16+ with a TV in household (n = 3412 UK, 479 Scotland, 1941 England, 483 Wales, 509 Northern Ireland, 232 Scotland urban, 247 Scotland rural, 916 Scotland 2008, 1002 Scotland 2009, 1452 Scotland 2010, 479 Scotland 2011)

QH1a. Which, if any, of these types of television does your household use at the moment?

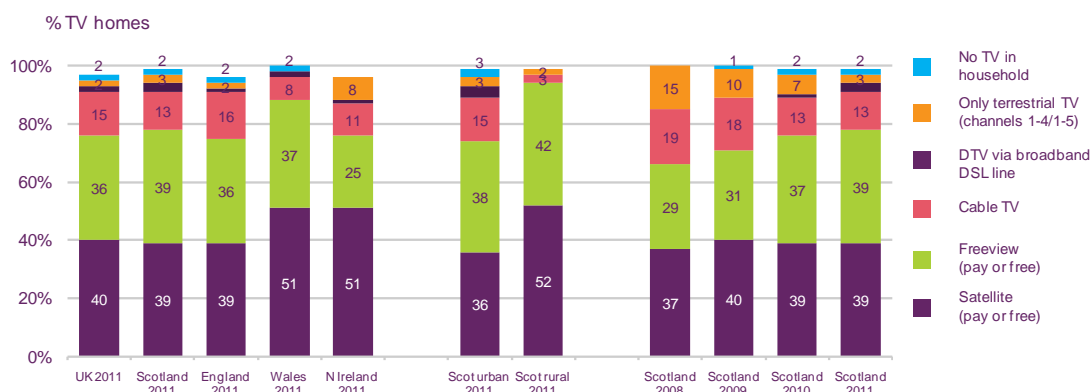
#### Satellite and DTT are the most widely used platforms on main TV sets in Scotland

The mix of platforms used to view digital television has remained broadly similar in Scotland over the last couple of years; though those using DTT has continued to creep up, driving analogue conversions during 2010.

The mix of platforms used in urban versus rural areas of Scotland differs, due to the lack of cable infrastructure in rural areas.

Fifty-six per cent of adults with a TV at home in Scotland have a pay TV service, which is an increase of four percentage points since Q1 2010, and on a par with the UK figure (57%).

**Figure 2.2 Main set TV share in Scotland, by platform**



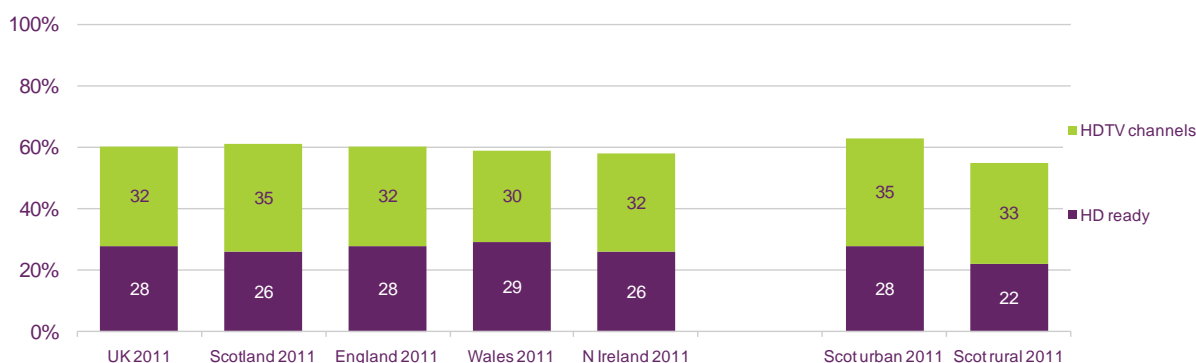
Source: Ofcom research, Q1 2011 Base: All adults aged 16+ (n = 3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural, 925 Scotland 2008, 1014 Scotland 2009, 1468 Scotland 2010, 487 Scotland 2011) QH1a. Which, if any, of these types of television does your household use at the moment?

## 2.2 Access to high-definition TV

### Over a third of people in Scotland have access to HDTV channels at home

Six in ten homes in Scotland have an HD-ready TV set, and over half of these also claim to have access to HDTV channels (via cable, satellite or DTT). This equates to 35% of adults in Scotland with access to HDTV channels, marginally above the UK average (32%)<sup>1</sup>. The most commonly used platform to access HDTV channels in Scotland is Sky (used by 71% of HDTV subscribers), followed by Freeview (15%) and Virgin Media (12%).

**Figure 2.3 Proportion of homes in Scotland with HD-ready TV sets and HDTV**



Source: Ofcom research, Q1 2011

Base: All adults aged 16+ (3474 UK, 487 Scotland, 1983 England, 493 Wales, 511 Northern Ireland, 239 Scotland urban, 248 Scotland rural)

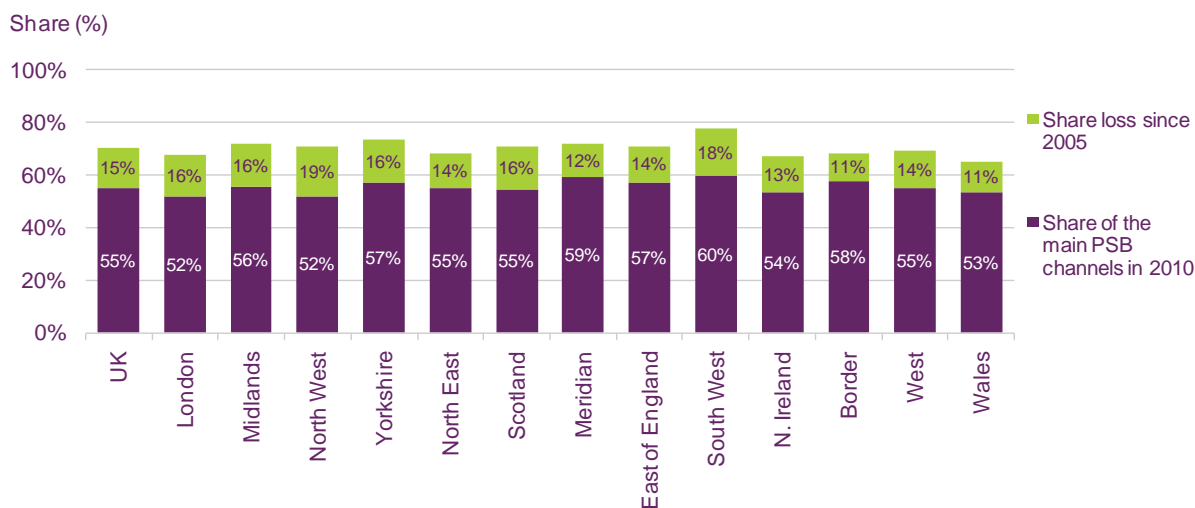
QH53. Is the main TV in your household an HDTV set or HD ready? / QH54. For the main TV set, does your household have an HD TV service – from either Sky, Virgin Media, Freesat or Freeview?

<sup>1</sup> This figure may be prone to over-claim, as some consumers may believe that having an HD-ready TV set means that HD channels are being received.

## 2.3 Broadcast television viewing

There was a 16 percentage point (pp) reduction during 2010 in the combined share of the five main PSB channels in Scotland (reaching 55%). This reduction was marginally higher than the average reduction across the UK (15pp) and greater than those experienced in the other nations and English regions, with the exception of the South West and North West of England.

**Figure 2.4 Reduction in combined share of the five PSB channels, all homes: 2005 and 2010**



Source: BARB

Across Scotland, BBC One's early evening regional news bulletin attracted an 29% share of viewing – the same as the UK average. STV's counterpart bulletin attracted a lower average share (24%); but this was higher than the UK average for the local Channel 3 bulletins elsewhere (18%). In the Border area, ITV's bulletin had a 38% share – well above the UK average, and higher than the BBC share of 27% in that region.

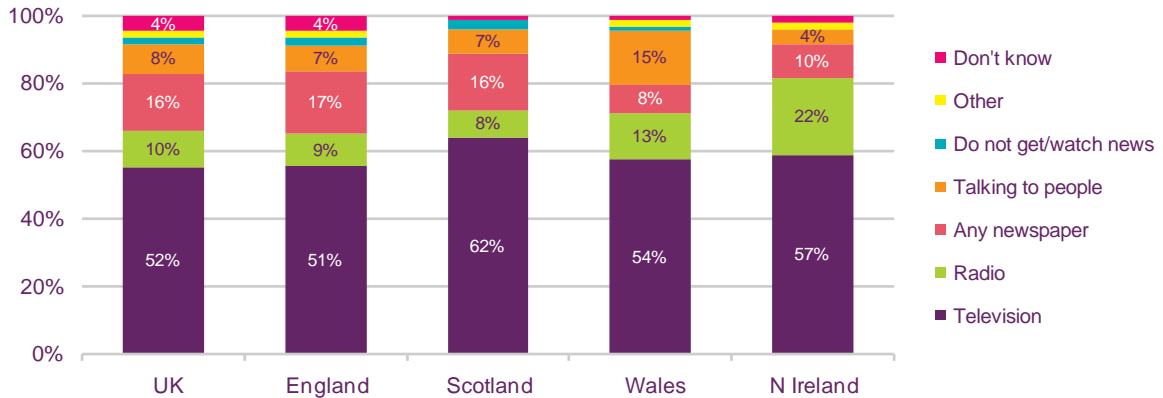
**Figure 2.5 BBC One and ITV1/STV/UTV/ITV Wales early evening news bulletin shares, all homes: 2010**



Source: BARB

In 2010, 62% of adults in Scotland claimed that TV was their main source of local news, significantly higher than the UK average of 52%. Newspapers were second most mentioned at 16%, the same as the UK average, followed by radio (8% vs. 10% UK average) and 'talking to people' (7% vs. 8% UK average).

**Figure 2.6 Sources of local news in each nation: 2010**



'Can you tell me what, if anything, is your main source of news about what is going on in your own local area?'

Source: Ofcom Media Tracker Survey 2010

Base: All adults 15+. n = 2,141 (UK), 1,726 (England) 194 (Scotland), 113 (Wales), 108 (NI)

Only responses ≥ 4% labelled

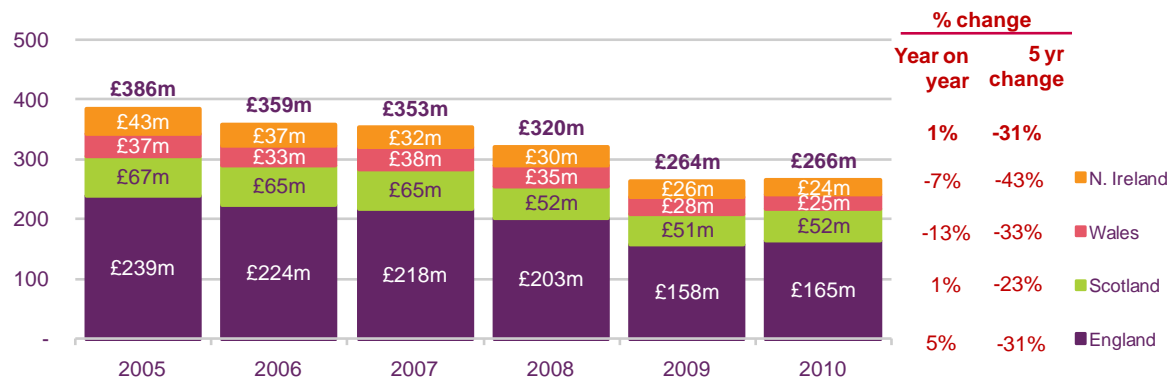
## 2.4 Spending by PSBs on TV content for viewers in Scotland

A total of £266m was spent by the BBC and ITV/STV/UTV on producing programmes specifically for viewers in Wales, Scotland, Northern Ireland and the English regions in 2010. This was up by £2m (1%) on 2009.

Year-on-year spend in Scotland was up by 1% from 2009 to £52m, although there was a reduction in spending of 23% in five years, with investment decreasing by £15m over the period.

**Figure 2.7 Spend on originated nations' and regions' output by the BBC/ITV1/STV/UTV**

Spend (£m, 2010 prices)



Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC.

## Change in spend by genre

Figure 2.8 shows change in spend by the BBC and STV, by genre, over one- and five-year periods. On total spend Scotland was the least affected over the five-year period, with investment decreasing by a fifth (23%) compared to England's 31% reduction. Scotland's-23% was lower than the total UK average decrease in spend of 31%, a reduction in Wales of 33% and a fall in Northern Ireland of 43%.

**Figure 2.8** Change in spend by genre and nation, 2005 - 2010

	England		Scotland		Wales		N. Ireland	
	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)	1yr (£m)	5yr (£m)
News	4	-48	0	-3	2	-3	-1	-7
Current affairs	1	-3	0	-1	0	-1	-0	-1
Non-news/non-current affairs	1	-22	0	-11	-6	-9	-1	-11
<b>Total Spend in 2010</b>	<b>£165m</b>		<b>£52m</b>		<b>£25m</b>		<b>£24m</b>	

	England		Scotland		Wales		N. Ireland	
	1yr	5yr	1yr	5yr	1yr	5yr	1yr	5yr
<b>Change in Spend</b>	5%	-31%	1%	-23%	-13%	-33%	-7%	-43%

Source: Broadcasters. All figures expressed in 2010 prices.

Note: Spend excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. Annual reductions in spending by genre are all below £0.5m, with the result that the each is shown as a zero in the table above.

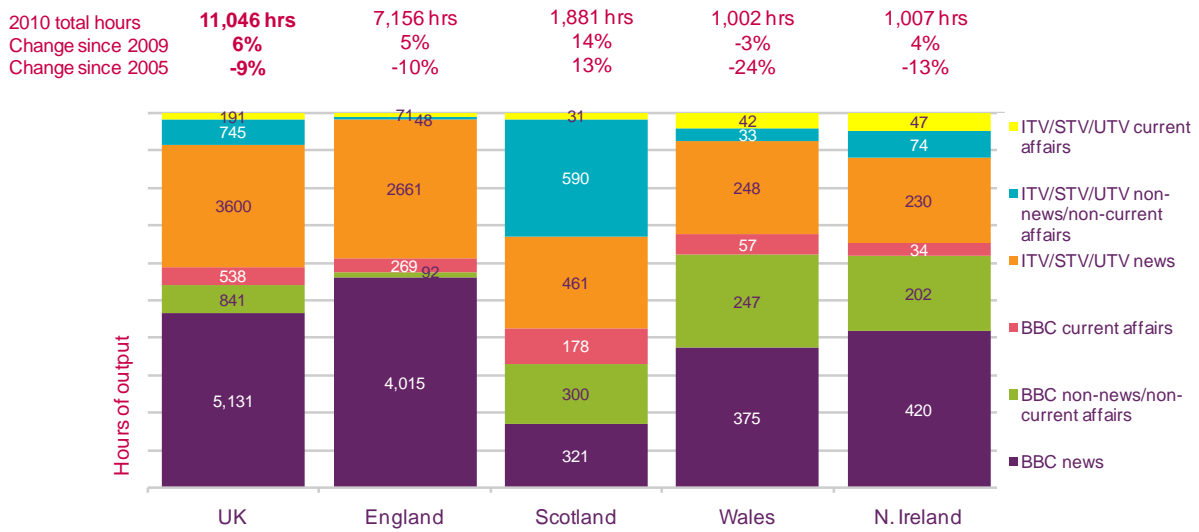
## 2.5 Hours of output of content for viewers in Scotland

The BBC and ITV1/STV/UTV produced a total of 11,046 hours of programmes for the English regions, Scotland, Wales and Northern Ireland in 2010, up 6% from 10,439 hours in 2009.

The number of hours produced specifically for viewers in Scotland was up 14% from 2009 to 1,881 hours compared to a 13% increase since 2005. This compares to a UK-wide average decline of 9% over this five-year period.

The number of hours for non-news/non-current affairs in Scotland was up by 26%, from 2009. The sizeable increase in non-news/non-current affairs output is likely to be explained by STV opting out of more networked content on Channel 3.

**Figure 2.9 Hours of regionalised output by genre and broadcaster, 2010**



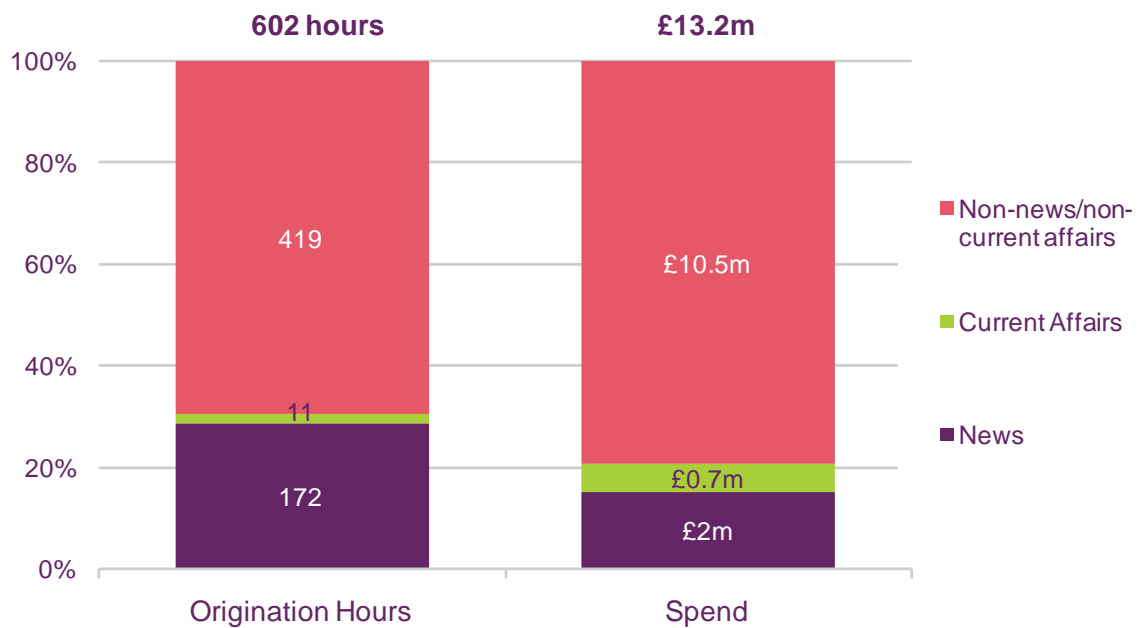
Source: PSB returns

Note: Hours data for first-run originations only. Hours excludes Gaelic and Welsh language programming but includes some spend on Irish language programming by the BBC. In terms of scheduled output on BBC services in 2010, the 2,567 hours on BBC Alba.

## BBC ALBA

BBC ALBA is the Gaelic-language service backed by the BBC and MG Alba. The channel spent £13.2m on original programming in 2010, in line with its Service Licence Commitment. This represents an annual decrease of 25%. However in 2009 the cost of programmes transmitted peaked as stock had been built up in the pre-launch period for transmitting in the early days of the channel. This stock of programmes was completely used up by 2010. In 2010 BBC ALBA broadcast 2,567 hours, of which 602 (23%) were originations.

**Figure 2.10 BBC ALBA originations, by hours and spend: 2010**



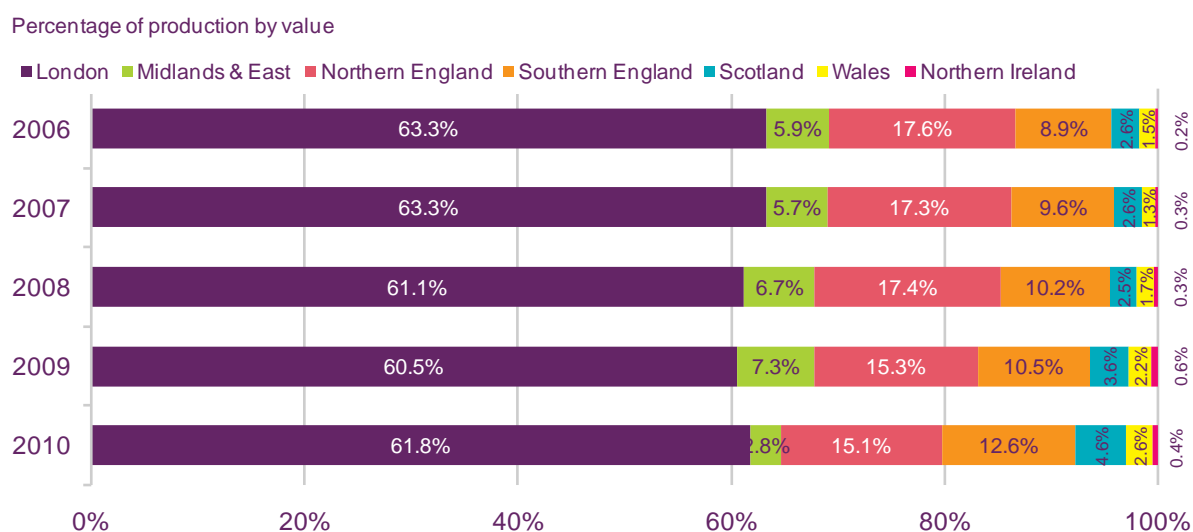
Source: BBC

## 2.6 PSB television quota compliance

Figure 2.11 illustrates the distribution of spend on qualifying first-run commissioned content in 2010 by PSB channels. Just over 60% of qualifying expenditure (61.8%) was devoted to productions made within the M25 area. This figure was a little higher (1.3 percentage points mostly as a result of the transfer of spending from the English regions to London)) than in 2009 (60.5%), but down from 63.3% in 2006. A further 15% of first-run spending was captured by producers based in the North of England (on a par with 2009) and 12.6% in Southern England (up from 10.5% in 2009).

In Scotland, first-run productions accounted for 4.6% of expenditure, up from 3.6% of total expenditure in 2009. In Wales, the figure rose from 2.2% to 2.6%. In Northern Ireland, the figure fell from 0.6% of total spending on first-runs to 0.4%.

**Figure 2.11 Expenditure on out-of-London productions**

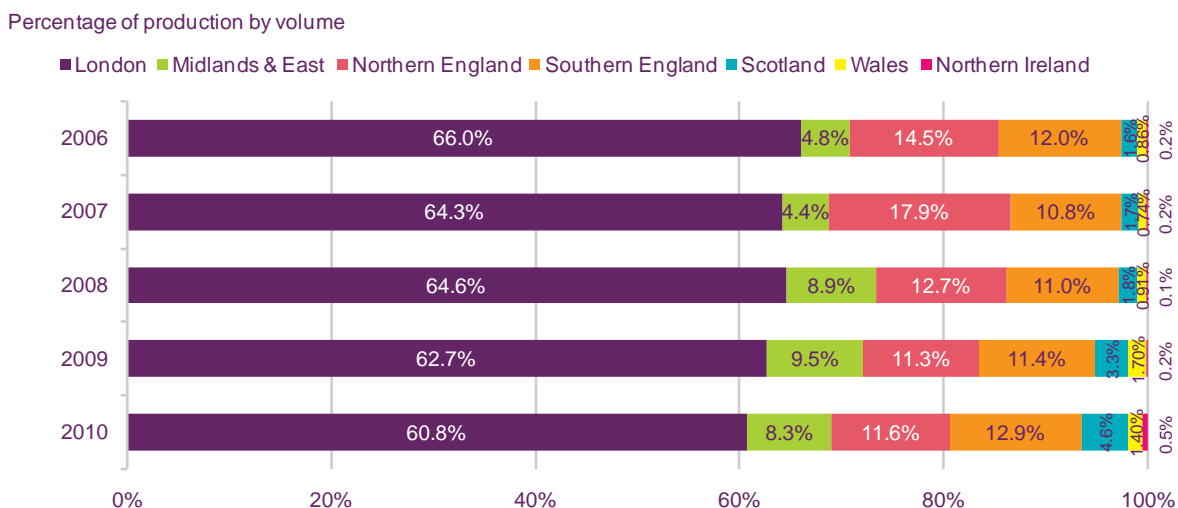


Source: Broadcasters

In terms of volume, 60.8% of first-run programmes made in the UK in 2010 were produced within the M25, down from 62.7% in 2009 and 66% in 2006. A further 11.6% was produced in Northern England, 12.9% in Southern England and 8.3% in the Midlands and East.

Producers in Scotland delivered 4.6% of all first-run hours during 2010, up from 3.3% twelve months earlier (and up from 1.6% in 2006), while the comparable figure for Wales was 1.4% (down from 1.7% in 2009 but still up on the 0.9% figure for 2006). First-run hours produced in Northern Ireland rose from 0.2% in 2009, to 0.5% in 2010 (Figure 2.12).

**Figure 2.12 Volume of out-of-London productions**



Source: Broadcasters



## 2.7 Production chains

BBC network TV spend in Scotland rose to over 7% of the total in 2010, with network TV hours produced in Scotland also increasing networked dramas including *Lip Service*, *The Deep*, *Single Father*, *Zen* and *Garrow's Law*.

Ofcom has also noted ITV's decision, reported in May of this year, not to re-commission *Taggart*. STV is reported to be exploring a range of options for the programme with a number of broadcasters and is committed to the *Taggart* brand. The decision did not affect Ofcom's out-of-London production figures in this report.

The MG ALBA/BBC partnership continues to hold commissioning rounds for BBC ALBA, which is now being carried on Freeview and cable. Commissioning includes volume supply deals with independent production companies.

## 2.8 Creative industries

In March 2011 Creative Scotland published its corporate plan: *Investing in Scotland's Creative Future*<sup>2</sup>. One of its aims is to have a sustainable film and TV sector with a digital network, and the BBC expanding its role in Scotland. One of the main strands is a programme driven by economic objectives to deliver more film and TV production capacity. Creative Scotland has pledged to establish partnerships with broadcasters.

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<sup>2</sup> <http://www.creativescotland.com/about/our-plans/corporate-plan>