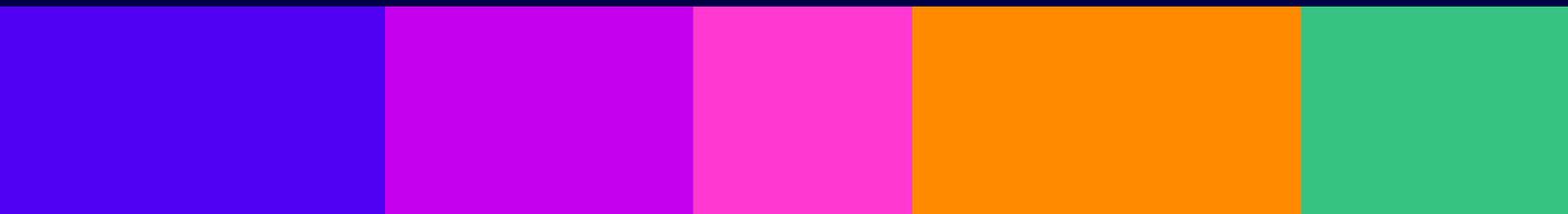




Media Nations

Scotland 2023

Published 3 August 2023



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1. Overview

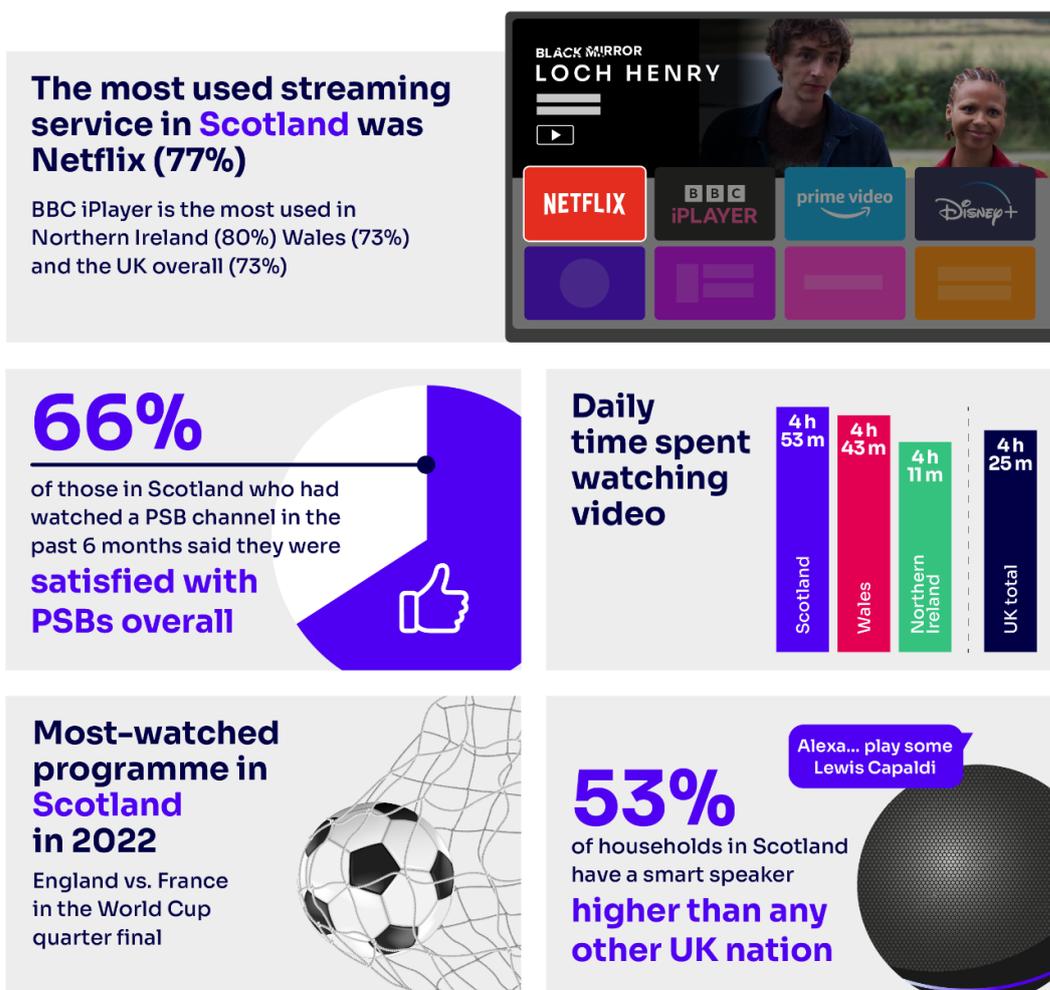
Introduction

This *Media Nations: Scotland* report reviews key trends in the media sector and sets out how audiences are served in Scotland. We adopt a cross-platform perspective, including broadcast TV and radio, as well as digital delivery including online video and audio streaming.

The report provides trends and analysis based on several datasets, including data collected directly from licensed television and radio broadcasters (for output, spend and revenue) as well as Ofcom's own consumer research and Barb and RAJAR data (for audience consumption).

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

Key findings



Sources used: Ofcom's VoD Survey 2023, Ofcom's Public Service Media Tracker 2022, Barb, Ofcom Technology Tracker 2023.

2. TV and video

Market developments

Draft Media Bill published

The UK Government published its [draft Media Bill](#) in March 2023, setting out its plans to modernise broadcasting legislation. It includes provisions for a new prominence regime, to ensure that PSBs' on-demand services such as BBC iPlayer and STV Player are prominent, available and easily accessible on online TV platforms (including smart TVs, set-top boxes and streaming sticks) against the backdrop of increased competition from global streaming services.

Scottish Affairs Committee report on broadcasting in Scotland

In March 2023, the Scottish Affairs Committee published [a report on public broadcasting](#) in Scotland. The report made a series of recommendations to the UK Government, including a recommendation that it commits to Freeview beyond 2034, given the role the committee sees Freeview continuing to play in serving rural households in Scotland. The UK Government reaffirmed its commitment to Freeview in [its response](#) and highlighted Ofcom's review of the sector, which it is due to carry out before 2025, as part of its evidence-gathering regarding the future of digital terrestrial television (DTT) beyond 2034.

The Committee also recommended the adoption of a prominence regime that would ensure that STV's on-demand service is featured prominently for audiences in Scotland. The UK Government pointed to the provisions in the Draft Media Bill, which include online prominence for STV.

New operating licence for the BBC

Ofcom published a new, modernised [BBC operating licence](#) in March 2023, setting out how Ofcom will hold the BBC to account for delivering its remit, while enabling it to adapt and innovate in how it delivers content to viewers and listeners, whose habits are dramatically shifting. The new licence came into effect on 1 April 2023 and includes requirements on the BBC's services in Scotland, including:

- The retention of quotas ensuring that at least 8% of the hours of, and spend on, television network programmes are made in Scotland.
- The requirement that the BBC's services in Scotland provide content of interest and relevance to audiences in Scotland that reflects Scotland's culture.
- The retention of quotas for news and current affairs content for BBC One Scotland.
- New transparency requirements for the BBC's services in Scotland regarding its plans to provide a range of content in other genres for audiences (replacing previous quotas).
- A new requirement for BBC ALBA to provide content aimed at people learning Gaelic (in place of the previous quota), supported by transparency requirements.

Channel 3 and Channel 5 licence renewal

In March 2023, the Secretary of State for Culture, Media and Sport wrote to Ofcom confirming she did not intend to prevent the renewal of the Channel 3 and Channel 5 licences, which will be in place for a ten-year period from 1 January 2025. These licences are currently held by ITV and STV (Channel 3) and Paramount Global (Channel 5). [In her letter](#), the Secretary of State noted the importance of news and current affairs programming that the licensees must produce in meeting their PSB obligations, particularly for the nations, and highlighted the significant contribution of the channels to the UK's out-of-London production sector. STV, ITV and Paramount Global have now applied for renewal, and Ofcom recently consulted on the proposed methodology for [a review of the financial terms](#) of the Channel 3 and Channel 5 licences.

Scottish TV production

There has been significant growth in the amount of studio space available in Scotland in recent years. Co-funded by the Scottish Government through Screen Scotland and Glasgow City Council, a state-of-the-art TV studio in Kelvin Hall, Glasgow opened in September 2022 to house entertainment productions. Operated by BBC Studioworks, the studio has already housed BBC One quiz show *Bridge of Lies*, produced by STV Studios, and BBC Two's *Frankie Boyle's New World Order*.

This year also saw the opening of Nightsky Studios in Coatbridge, and the return of *The Rig* to Leith, where the filming for season 2 of the Amazon production takes place at FirstStage Studios. And as a further boost for Scotland's TV and production industry, the UK Government recently chose Dundee to host one of four research and development centres specialising in the future of virtual production, using CGI, augmented reality and motion capture to create visual sets. [The CoSTAR lab](#), located at Waters' Edge Studios, is being led by Edinburgh and Abertay Universities and is co-funded by the UK Government and industry investment.

MG ALBA

MG ALBA delivers Gaelic-language media across a range of platforms, including programming for Gaelic speakers across Scotland through its partnership with the BBC. Last year, MG ALBA published its [Route Map for Gaelic Media](#), with a goal for Gaelic media to reach one million people per week by 2027. MG ALBA is delivering on this through its investment in new content, such as the much-anticipated drama *An Clò Mòr*, and short-form videos which have been successful in attracting younger audiences. Its focus this year is on the [digitisation of its media](#), to ensure that it is responding to the shift in audiences from linear to online, and on securing the statutory status and funding it believes is required to fulfil the *Route Map*.

TV services and devices

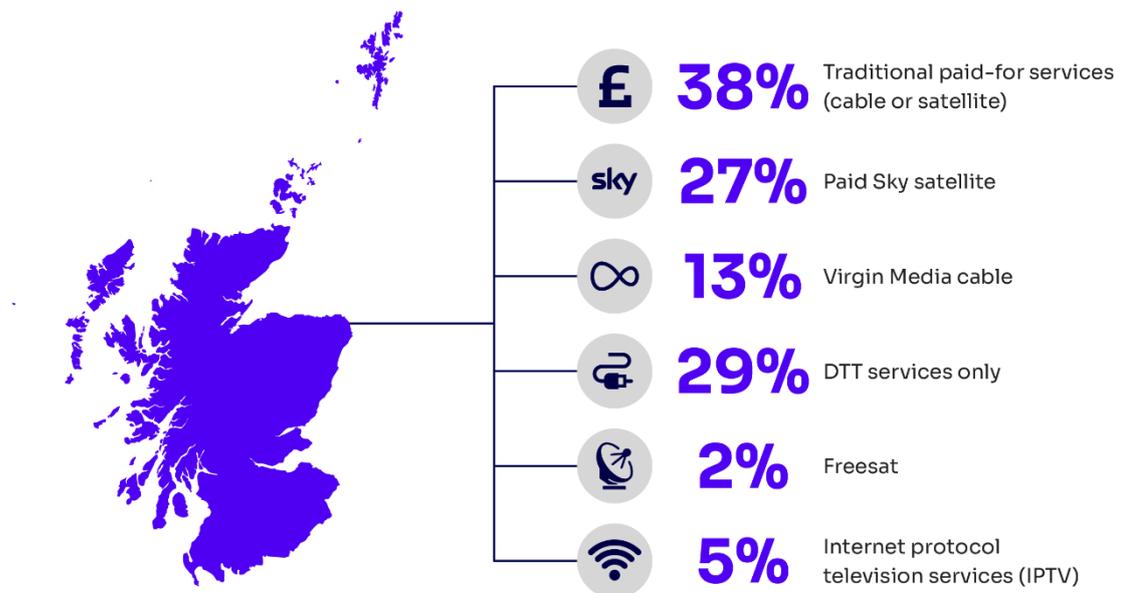
More homes in Scotland have a pay-TV service than rely on Freeview or Freest

More than nine in ten households in Scotland (93%) had a TV set in Q1 2023. Traditional paid-for television services such as satellite (primarily Sky) and cable services (Virgin Media) were present in 38% of homes in Scotland in Q1 2023. Paid-for satellite services account for the majority of these, with Virgin Media's cable service present in 13% of Scottish households in Q1 2023.

Households with DTT services only (delivered through an aerial) account for most of the free TV provision (29%), with free satellite present in just 2% of homes in Scotland, through Freesat or Freesat from Sky.

Only a small proportion of homes in Scotland (5%) have an internet protocol television service (IPTV). These are delivered through set-top boxes from providers such as TalkTalk and BT, and offer a Freeview service alongside pay-TV channels, delivered through an internet connection.¹

Figure 1: Take-up of TV platforms in Scotland: Q1 2023



Source: Barb Establishment Survey Q1 2023. 'DTT services only' includes households with an aerial and not cable, satellite or IPTV. IPTV includes BT Vision, TalkTalk, Youview or Plusnet. In the 2022 report 'traditional paid-for services' also included IPTV and is therefore not comparable with the figure above which includes paid cable and satellite only.

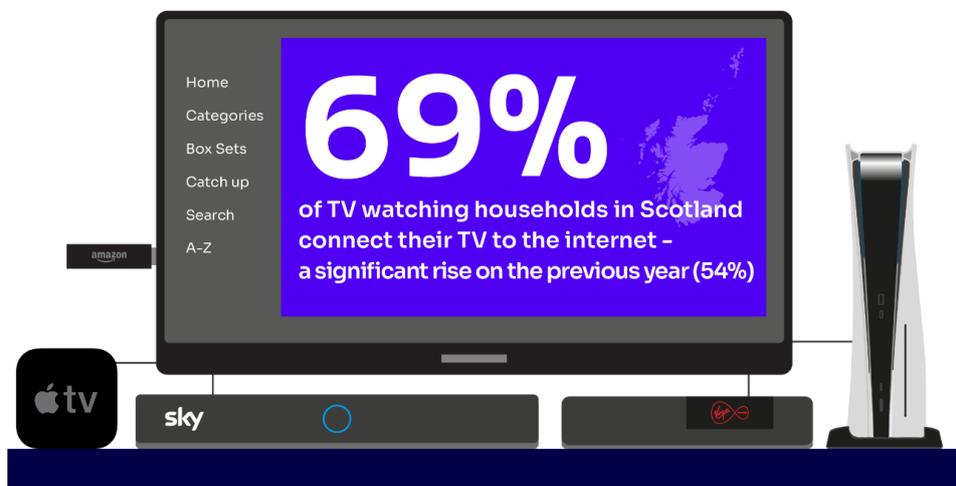
¹ Barb Establishment Survey Q1 2023

More than two-thirds of TV users in Scotland have connected TVs in 2023

There are several ways in which TV users in Scotland can connect their TVs to the internet. This can be through a 'smart' TV that connects directly to the internet, or through the set-top boxes provided by pay-TV providers like Sky, Virgin Media or BT. External devices such as streaming sticks and games consoles can also connect TV sets to the internet.

In the first half of 2023, more than two-thirds (69%) of TV users in Scotland had a connected TV using one of these methods. This was broadly in line with the average across the UK, where 65% of TV homes had a connected TV. TV users in Scotland are more likely to connect their TV to the internet via a games console (21%), compared to the UK average of 11%.

Figure 2: Connected TVs in Scotland: 2023



Source: Ofcom Technology Tracker 2023.

Broadband in Scotland

More than nine in ten (93%) homes in Scotland had an internet connection in the first half of 2023; 87% had fixed broadband.² Looking at the services available to consumers in Scotland, 94% of all homes in Scotland had access to superfast broadband (download speeds of at least 30 Mbit/s) as of September 2022. Of those households with availability, 71% were using a superfast (or faster) service, up from 68% in 2021. Full-fibre services were available in 41% of households in Scotland. Take-up in those homes was 23%.³

² Ofcom Technology Tracker 2023

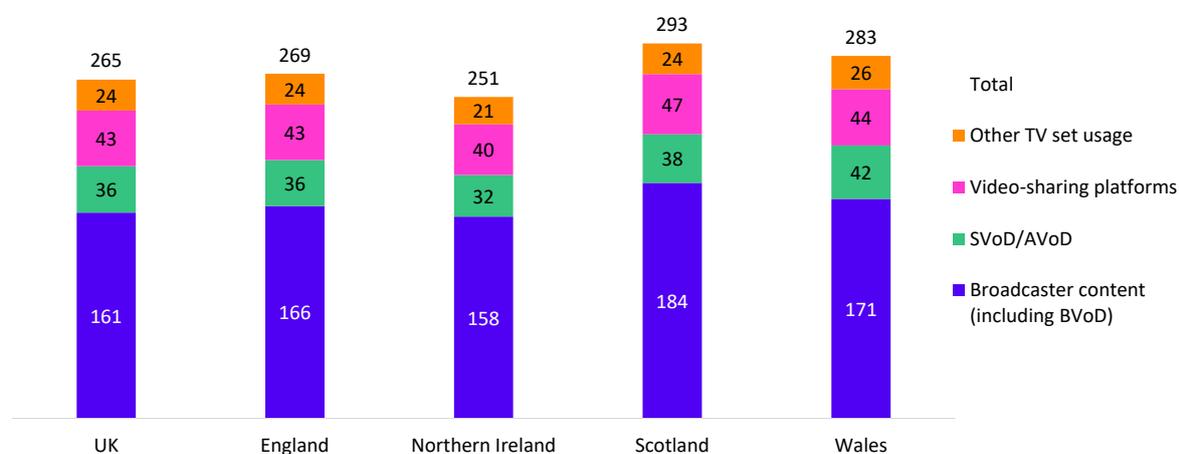
³ Ofcom analysis of provider data. Please refer to [Connected Nations 2022 UK report](#) and [Connected Nations 2022 Scotland report](#) for more information.

Viewing trends

Total in-home video viewing

On average, people in Scotland watched nearly 5 hours of video content per day in 2022, the most of any of the UK nations. Content from broadcasters – which includes live TV, recorded TV and broadcaster video-on-demand (BVoD) – accounted for 63% of this time (3 hours 4 minutes). The time spent viewing broadcaster content and content on video-sharing platforms (VSPs) were both highest in Scotland, out of all the nations, while viewing to subscription video-on-demand (SVoD – e.g., Netflix) and advertising video-on-demand (AVoD – e.g., Freevee) services was lower in Scotland than in Wales.

Figure 3: Total in-home daily video viewing minutes per person split by platform, by nation: 2022



Source: Barb, as viewed. Broadcaster content includes live TV, recorded playback and BVoD. The UK total minutes here is not the same as in the UK report; the UK report includes estimates for out-of-home viewing which are not included here. Due to rounding, the total minutes in the chart might be slightly different to summing the individual sections of each bar. 'Other TV set usage' includes viewing to some SVoD/AVoD/VSP that cannot be definitively measured. This category also includes some unmeasured broadcast channels, non-catch-up DVD/DVR viewing, some EPG/menu browsing, viewing when the audio is muted, piracy, unmeasured boxsets/pay-per-view content, and non-video internet activity through a PC or other device connected to the TV. SVoD excludes viewing of NOW, which is captured within BVoD along with Sky Go/Sky TV On Demand (these two services stream the same content, so measured viewing cannot be separated out).

Broadcast TV viewing in Scotland

Where our data comes from

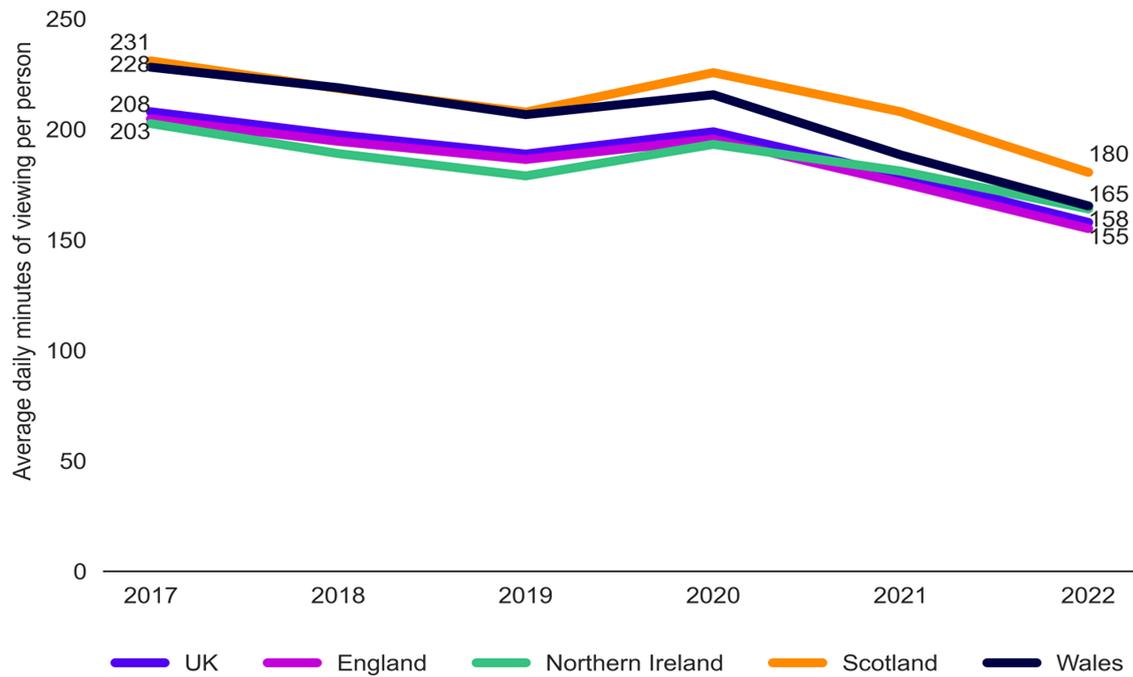
Most of the viewing data comes from Barb Audiences Ltd (Barb), the industry's standard for understanding what people watch. This includes viewing of broadcast TV through TV sets and via devices attached to TV sets, such as computers, streaming devices and set-top boxes. It also includes some viewing for online streaming services and for devices not connected to the TV being watched at home via WiFi. The number of households on the Barb panel in Scotland is around 550 homes. Barb does not capture out-of-home viewing to SVoD services or video sharing platforms.

Unless otherwise stated, Barb figures quoted for broadcast TV are for 28-day consolidated viewing on a TV set. Consolidated viewing includes viewing of programmes at the time they were broadcast (live viewing) as well as from recordings on digital video recorders (DVRs) and through online BVoD services (e.g. BBC iPlayer, ITVX and Sky Go/Sky TV On Demand) up to 28 days after the first broadcast (time-shifted).

People in Scotland watched the most broadcast TV of any UK nation in 2022

On average, people in Scotland spent 3 hours per day watching broadcast TV on the TV set in 2022, the most of any nation in the UK. This was down by 27 minutes compared to 2021. Proportionally, this represented a 13.2% decrease between 2021 and 2022, compared to the UK average decrease of 11.9%. Scotland had the largest decrease in daily viewing of all the UK nations compared to 2021, with viewing decreasing among all age groups.

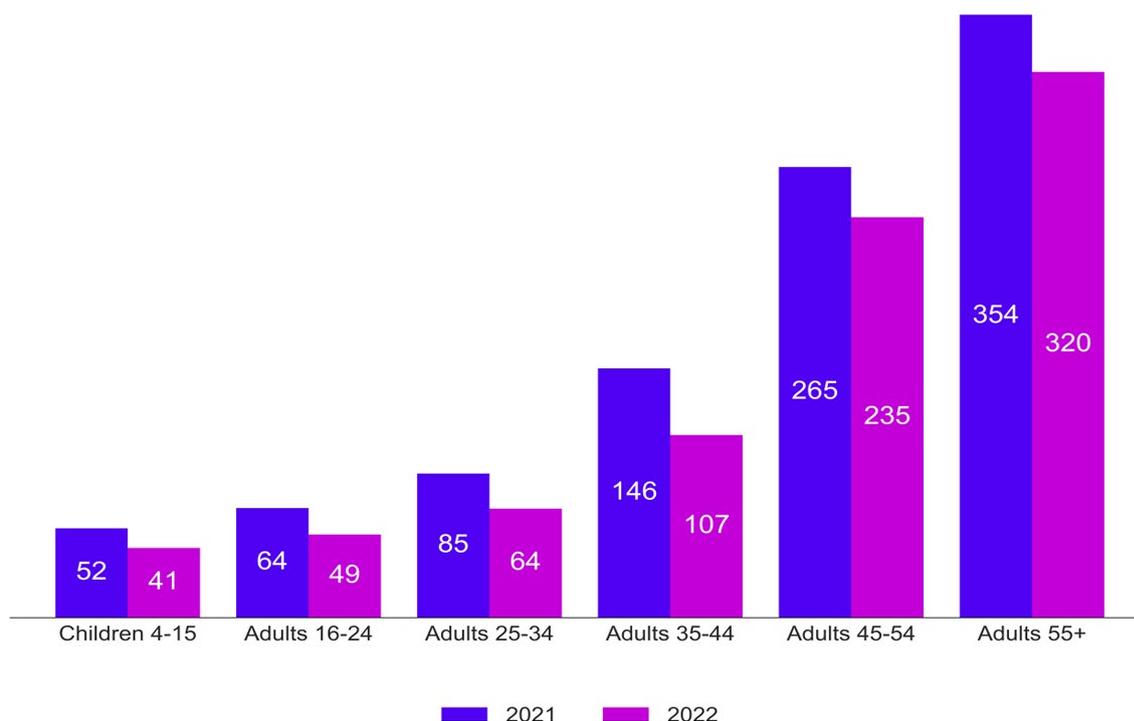
Figure 4: Average daily minutes viewed of broadcast TV per person, by nation: 2017-2022



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

In line with the general trend across the UK, older people in Scotland watched more broadcast TV on the television set than younger viewers. The over-54s watched more than any other age group, at an average of 5 hours 20 minutes per day, down by 9.5% since 2021. Children aged 4-15 watched the least, at an average of 41 minutes per day, down by 21.9% since 2021.

Figure 5: Average daily minutes of broadcast TV viewed in Scotland, by age group: 2021-2022



Source: Barb consolidated 28 days, tv set only. BBC areas.

France's victory over England in the quarter-finals of the World Cup was the most-viewed programme in Scotland in 2022

In line with the most-viewed programmes across the UK, England's defeat to France (1-2) in the quarter-finals of the men's football World Cup on STV/ITV1 was the most-watched programme in Scotland in 2022, with an average audience of 1.1 million.

Sports and national events make up more than half of the top-10 programmes list in 2022, with events such as *The State Funeral of HM Queen Elizabeth II* and the *Eurovision Song Contest* proving popular. However, Scotland was the only UK nation in which the Scottish crime drama, *Shetland*, appeared in the top-10 list. The episode, broadcast on BBC One on 10 August 2022, had an average audience of 846,000 – slightly less than the 1 million for the highest-performing episode in 2021.

Figure 6: Top 10 most-watched programmes in Scotland: 2022

Rank	Programme title	Channel	Date	Average audience (000s)	Programme share (%)
1	World Cup (England v France)	STV/ITV1	10/12/2022	1,085	59.5
2	The State Funeral of HM Queen Elizabeth II (part 1)	BBC One	19/09/2022	1,059	59.9
3	The Tourist	BBC One	01/01/2022	1,041	45.5

Rank	Programme title	Channel	Date	Average audience (000s)	Programme share (%)
4	I'm a Celebrity... Get Me Out of Here!	STV/ITV1	06/11/2022	973	48.2
5	The State Funeral of HM Queen Elizabeth II (part 2)	BBC One	19/09/2022	963	62.6
6	Eurovision Song Contest	BBC One	14/05/2022	945	55.3
7	The Queen's Platinum Jubilee	BBC One	04/06/2022	895	56.7
8	Strictly Come Dancing	BBC One	11/12/2022	851	48.7
9	FIFA World Cup Final	BBC One	18/12/2022	848	51.6
10	Shetland	BBC One	10/08/2022	846	42.6

Source: Barb 28-day consolidated across TV and other devices in the home. Highest occurring episode by channel, ranked by average audience. Channels include any relevant +1s channels.

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

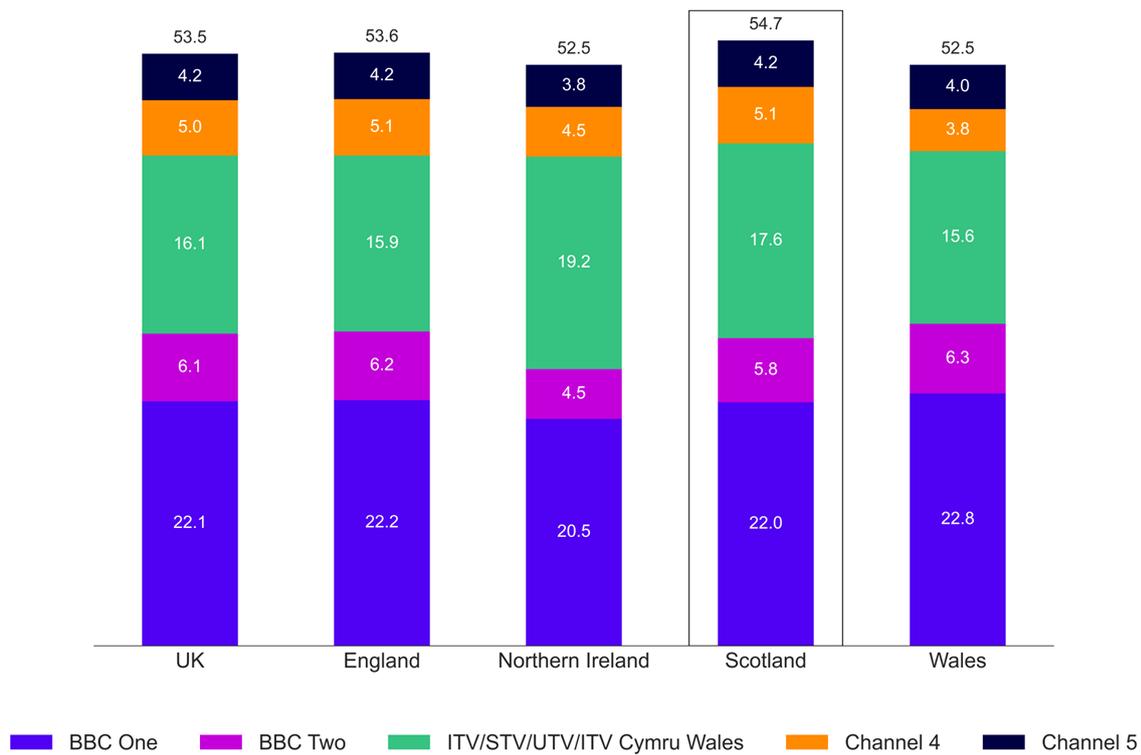
What is public service broadcasting?

Public service broadcasting (PSB) is currently provided in Scotland by the BBC, Channel 4 Corporation (C4C), STV, ITV, and Channel 5. Although all the BBC TV services are PSB channels, only the main channels of the other broadcasters are. In return for providing PSB services such as news and original productions, these broadcasters receive certain benefits: access to spectrum (the radio waves that support wireless communication) to broadcast their services; prominence on electronic programme guides on television (EPGs); and in the BBC's case, the licence fee.

BBC One Scotland and BBC Scotland are available across the country, while STV and ITV1 provide bespoke news programmes for those who live in the north of Scotland, central Scotland, and the south of Scotland. Channel 4 and Channel 5 provide their public service content on a pan-UK basis.

In 2022, the main five PSB channels accounted for a combined 54.7% share of the total broadcast TV audience in Scotland; this was a slight increase from 53.6% in 2021. BBC One had the highest audience share of any individual PSB channel, at 22%, broadly in line with the pan-UK figure. At 17.6%, the audience share for Scotland's Channel 3 services from STV and ITV was 1.5 percentage points greater than the UK average, and second only to Northern Ireland among the UK nations.

Figure 7: Share of total TV viewing for the five main PSB channels, by nation: 2022 (%)



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

Overall, two-thirds of audiences in Scotland are satisfied with PSBs

Ofcom’s Public Service Media Tracker (PSM)⁴ found that in Scotland, two-thirds (66%) of those who had watched a PSB channel in the last six months said they were satisfied with PSBs overall. Fourteen per cent said they were dissatisfied, higher than the UK average (10%), but consistent with 2021 findings.

⁴ Ofcom Public Service Media Tracker 2022

Figure 8: Satisfaction with PSBs overall – UK total and by nation: 2022

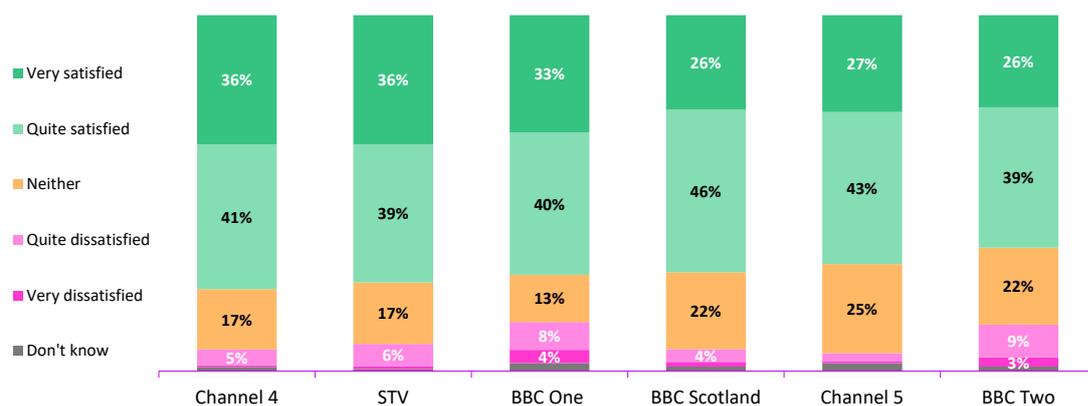


Source: Ofcom’s Public Service Media Tracker 2022. Question 28. And now, if you think about ALL the public service broadcaster channels combined, how satisfied are you that combined they provide the different elements asked about in the previous question? Base: All who have watched PSB channel/service in last 6 months, Total UK (2,826), England (1,850), Northern Ireland (366), Scotland (303), Wales (307). Note, not showing percentages under 5%.

About three-quarters of PSB viewers in Scotland are satisfied with Channel 4, STV, BBC One and BBC Scotland

When asked to consider PSB channels individually, about three-quarters of viewers in Scotland said they were satisfied with Channel 4 (77%), STV (75%), BBC One (73%) and BBC Scotland (72%). Slightly lower proportions said the same for Channel 5 (70%) and BBC Two (65%).

Figure 9: Satisfaction with individual channels: 2022



Source: Ofcom’s Public Service Media Tracker 2022. Question 23. Thinking about some of the specific channels you have watched in the last 6 months, overall, how satisfied or dissatisfied are you with these TV channels? Base: All who have watched ... in last 6 months, Channel 4 (257), STV (250), BBC One (268), Channel 5 (234), BBC Scotland (183), BBC Two (224). Note, not showing percentages under 3%.

For viewers in Scotland, PSBs are seen to deliver well on programmes made for UK audiences

Seven in ten PSB viewers⁵ in Scotland said PSBs overall performed well in providing *'programmes made for UK audiences'* (70%), while about two-thirds said the same for *'programmes that help me to understand what is going on in the world today'* (65%), and *'a wide range of different types of programmes, such as drama, comedy, entertainment or sport'* (63%), all largely in line with other nations. Compared to 2021, there was an increase in the proportion of viewers in Scotland saying that PSBs delivered well on *'programmes which feature people from different backgrounds'* (61%), up 9 percentage points year on year.

More than half said that PSBs delivered well on *'programmes that are relevant to me'* (54%) and *'programmes that feature people like me'* (51%), and a slightly lower proportion felt that PSBs did well in providing *'programmes that feature Scotland'* (47%). In addition, viewers in Scotland were less likely than the UK average to feel that PSBs overall delivered well on *'regional programmes that keep me informed about my area'* (48% vs 52%).

However, there was variation in attitudes towards individual PSB channels. For example, viewers in Scotland were more likely to say that BBC TV channels performed badly at delivering *'regional programmes that keep me informed about my area'* compared to the UK total (17% vs 10%), whereas for ITV and STV's PSB channels, viewers were more likely to say they delivered well on *'programmes that feature Scotland'* (69% vs 49%).⁶

⁵ Ofcom's Public Service Media Tracker 2022 defines PSB viewers as all who have watched a PSB channel/service in the last six months.

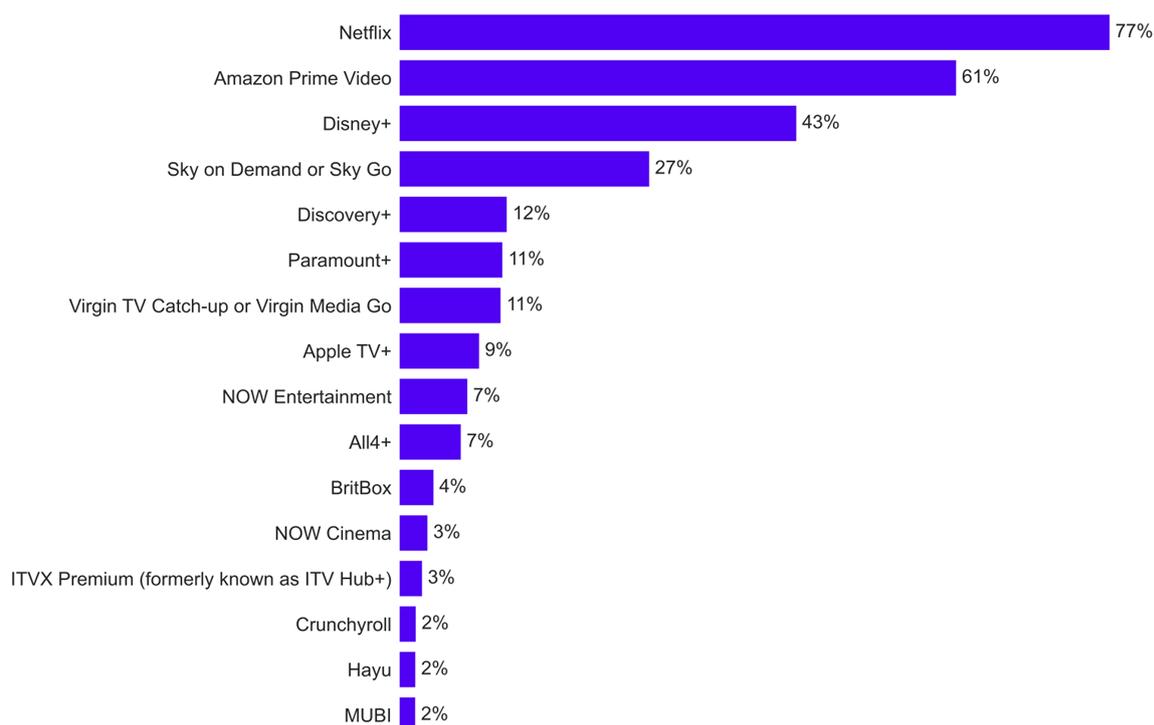
⁶ Ofcom's Public Service Media Tracker 2022.

Video-on-demand viewing trends

Viewers in Scotland are using a wide range of subscription services

Netflix is the most popular SVoD service in Scotland, followed by Amazon Prime Video and Disney+, but there are also many smaller SVoD services in Scotland which collectively have significant reach. These include services such as Apple TV+, and genre specialist services such as Hayu (reality TV) and Crunchyroll (anime).

Figure 10: SVoD services used in Scotland to watch programmes, films or other video: 2023



*Source: Ofcom VoD Survey 2023. Online adults/teens aged 13+, Scotland. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 162. Fieldwork conducted 22nd – 27th February 2023. *Payment of licence fee required to use BBC iPlayer.*

YouTube was the most popular video-sharing platform in all the nations, with 58% of online teens and adults in Scotland saying they used it to watch programmes, films or other video content in the three months before the fieldwork, slightly higher than Wales and Northern Ireland, but slightly below England.



In Scotland the most popular form of content viewed on YouTube were videos under 15 minutes (53%) while 46% reported that they watched content longer than 15 minutes. ‘YouTube Shorts’ were less popular, with only 29% reporting watching them, and 20% reported watching full-length programmes or films on YouTube.⁷

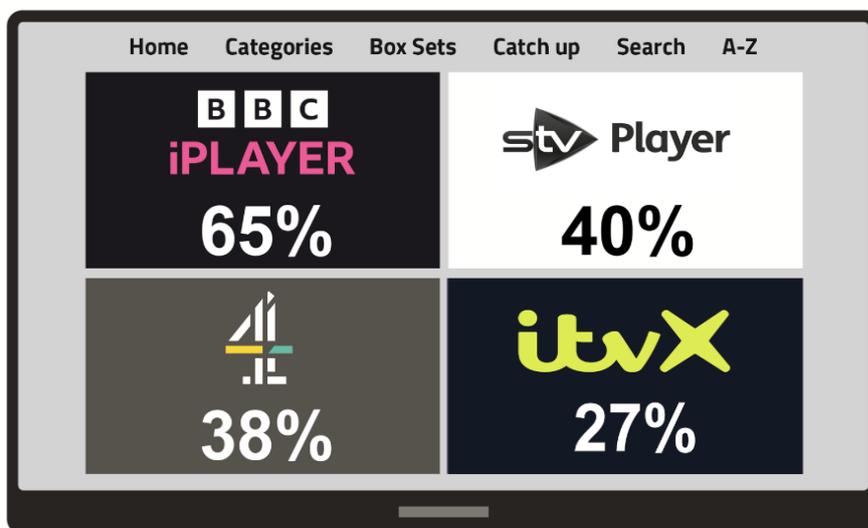
Ofcom’s PSM Tracker shows that levels of satisfaction with SVoD services remain high; about eight in ten viewers in Scotland say they are satisfied with Disney+ (82%) and Netflix (81%), while three-quarters say the same for Amazon Prime (75%).⁸

BBC iPlayer is the most popular PSB VoD service in Scotland

Ofcom’s VoD survey found that 90% of online adults and teens in Scotland used a free-to-view service (any streaming service not behind a paywall, including YouTube), slightly lower than the other UK nations.

Nearly two-thirds of people in Scotland (65%) used the BBC iPlayer in 2023, with about two in five used the STV Player (40%) and Channel 4’s VoD service (38%) over the same period. Following its launch at the end of 2022, just over a quarter of people in Scotland said they used ITVX in early 2023.

Figure 11: PSB video-on-demand services used to watch programmes, films or other video in the past three months



Source: Ofcom VoD Survey 2023. Online adults/teens aged 13+, Scotland. Question: Q1a. Can you tell us which of the following services you have personally used to watch programmes, films or other video content in the past 3 months? Base: 162. Fieldwork conducted 22nd – 27th February 2023. *Payment of licence fee required to use BBC iPlayer.

⁷ Ofcom’s VoD Survey 2023.

⁸ Ofcom’s Public Service Media Tracker 2022.

Overall, audiences in Scotland are satisfied with BVoD services

When asked to consider their satisfaction with each BVoD services, more than four in five (83%) viewers in Scotland said they were satisfied with BBC iPlayer, and about three-quarters said the same for All 4⁹ (77%). Seven in ten (70%) were satisfied with STV Player, while lower proportions of viewers said they were satisfied with ITV Hub (66%) and My5 (64%).

In Scotland, BVoD viewers¹⁰ said they used BVoD services *'to catch up on programmes that I have missed on TV'* (71%) ahead of that they could *'watch what I want, when I want'* (51%). Viewers in Scotland are more likely to use BVoD services to *'watch specific programmes or box-sets'* (49%) compared to the UK total (40%). The most frequently-cited reasons for not using BVoD services related to preferring other services, not being interested in the programmes available or not having access to the service.

News sources

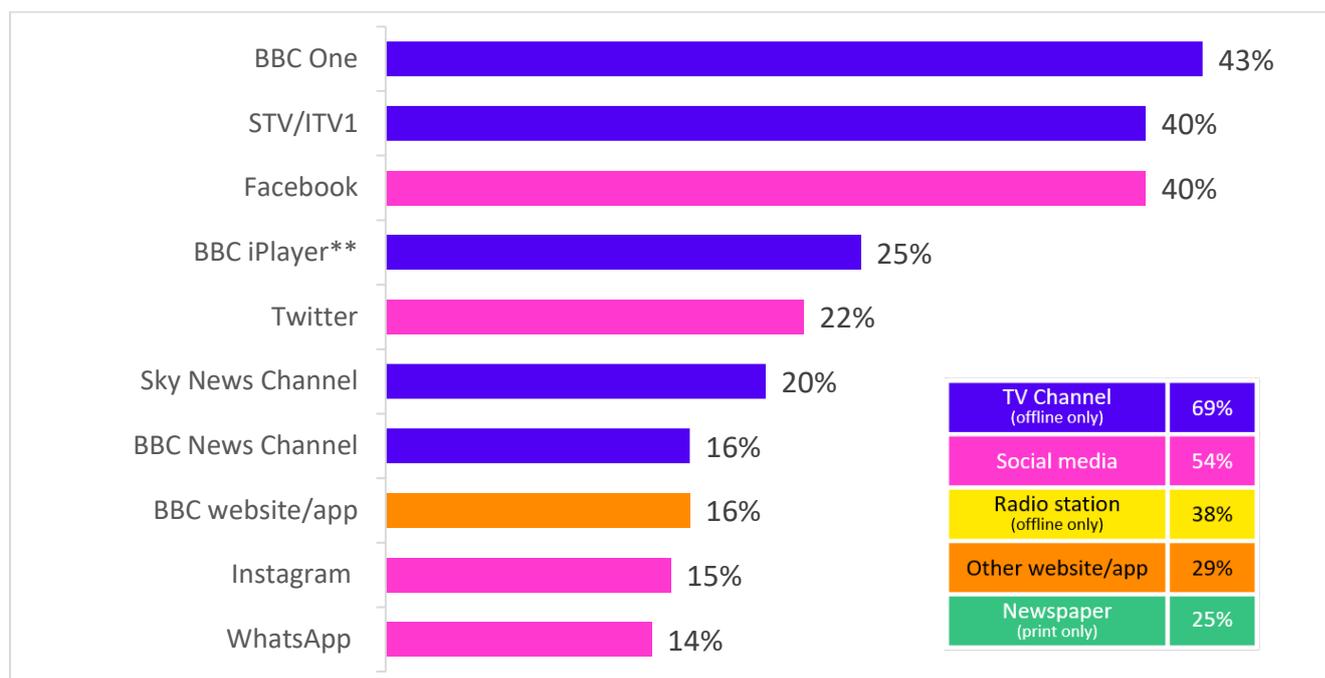
BBC One is the most-used news source in Scotland

Just under half of all adults in Scotland (43%) use BBC One for news in general, making it the most-used news source, followed by Scotland's Channel 3 providers STV and ITV1 (40%) and Facebook (also 40%). Other TV channels in the top ten include Sky News Channel and BBC News Channel. Social media other than Facebook also rank highly too, with Twitter fifth (22%) and Instagram ninth (15%). The BBC website/app was the highest-ranking news-specific website or app (16%).

⁹ At the time of fieldwork for the Public Service Media Tracker, Channel 4's BVoD service was called All 4 or All 4+ and ITV's BVoD was ITV Hub or ITV Hub+.

¹⁰ BVoD viewers are defined as those who have watched at least one BVoD service in the last six months

Figure 12: Top ten sources of news in general in Scotland: 2023

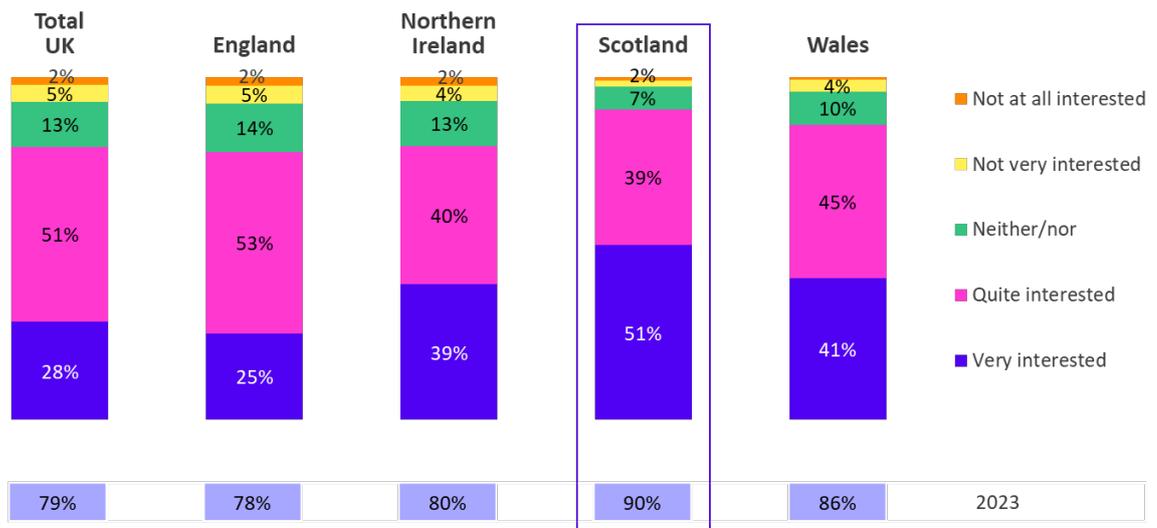


Source: Ofcom News Consumption Survey 2023 – Combined F2F and ONLINE sample. Question: C1. Which of the following platforms do you use for news nowadays? D2a-8a. Thinking specifically about <platform>, which of the following do you use for news nowadays? Base: All adults 16+ in Scotland - 2023=691 **BBC iPlayer added in 2023.

Ofcom’s News Consumption Survey this year also collected figures relating to the use of video-on-demand services. The most popular of these was BBC iPlayer; a quarter of adults in Scotland use this service for news, with 9% using ITVX and 7% using STV Player.

There continues to be a significant amount of interest in news about Scotland. Half of adults in Scotland who follow news claim to be ‘very interested’ in news about Scotland (51%) – this is higher than the equivalent figures for other UK nations and rises to 90% for those who are either ‘very’ or ‘quite’ interested.

Figure 13: Level of interest in news about own nation, by nation: 2023



Source: Ofcom News Consumption Survey 2023 – Combined F2F and ONLINE sample. Question: F3. How interested are you in news about your NATION/REGION? Base: All adults 16+ who follow news 2023 - Total=4371, England=2516, Scotland=665, Wales=627, Northern Ireland=563.

STV is the most-used source for news about Scotland

Looking at the individual sources that people in Scotland use to access news about their own nation, a third of people (33%) use STV through programmes such as *STV News*, making it the most-used individual news source about Scotland for people in Scotland. About a quarter (26%) say they use BBC One, but when looking at BBC One and the BBC Scotland channel together, this rises to 34% across programmes such as *Reporting Scotland* and *The Nine*.

Figure 14: Sources used to access news about own nation: 2023

England		Northern Ireland		Scotland		Wales	
BBC One	30%	UTV	41%	STV	33%	BBC One	38%
ITV1	18%	BBC One	34%	BBC One	26%	ITV Wales	28%
Facebook	16%	Facebook	17%	Facebook	22%	Facebook	25%
BBC website/app	9%	BBC Radio Ulster/Foyle	15%	BBC Scotland TV	10%	BBC website/app**	13%
BBC News Channel	5%	Cool FM	9%	Twitter	9%	Any Wales based news sites/apps	10%
Instagram	5%	U105	7%	BBC website/app	8%	Twitter	6%
Twitter	5%	BBC website/app	6%	Clyde 1/ Forth 1/ West Sound/ Tay FM/ Northsound 1/ MFR	7%	BBC Radio Wales	6%
		BBC iPlayer	5%	BBC News Channel	5%		
		Twitter	5%	Sky News Channel	5%		
				NET: BBC One/BBC Scotland	34%		

Source: Ofcom News Consumption Survey 2023 – Combined F2F and ONLINE sample. Question: F6. From which of the following sources do you get news about what is going on in NATION/REGION nowadays? Base: All adults 16+ using TV/Newspapers/Radio/Internet/Magazine for news 2023 – England=2466, Scotland=655, Wales=617, Northern Ireland=541 **Includes Welsh language version.

TV programming for and from Scotland

The BBC and STV provide programming specifically for viewers in Scotland across a range of genres, but most notably news output. There was a 4% increase in spending on first-run content for viewers in Scotland in 2022, with spend on current affairs increasing the most, up 7%. Non-news/non-current affairs accounts for the largest share of first-run spend (57%) in Scotland.

BBC hours of first-run content in Scotland dropped by 18% in 2022 to 1,209 hours. Overall, news content makes up the largest amount of the BBC's output for Scotland, comprising 55% of first-run hours.

Scotland is also an important source of production for PSB content shown across the UK. Some 6.3% of qualifying network spend on the PSB channels was on Scotland-based productions in 2022.

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 UK 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.

How we present financial data

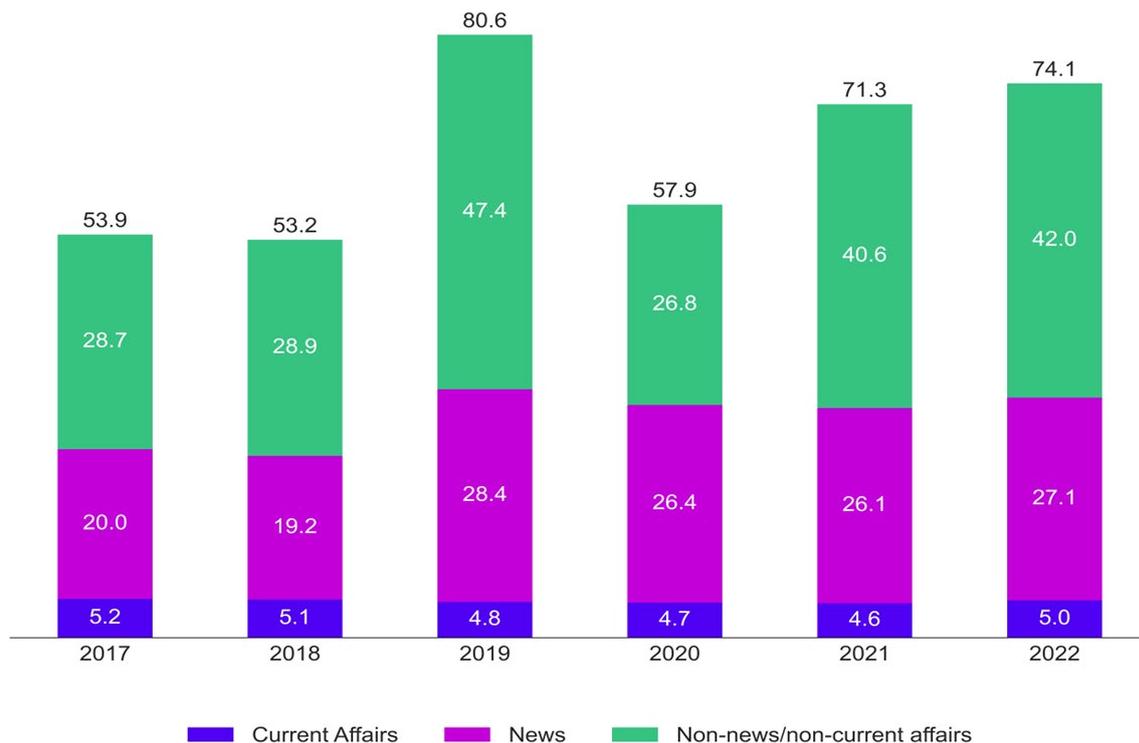
Financial data quoted in this report is presented in nominal terms, meaning that historical data has not been adjusted to account for inflation. In our interactive report, users can view financial data in either nominal or 'real' (CPI-adjusted) terms, with users easily able to switch between the two.

PSB spend on first-run content for Scotland rose across all genres in 2022

There was a 4% increase in spending by PSBs on first-run content for viewers in Scotland in 2022. Of the total £74.1m spend, the majority went towards non-news/non-current affairs, at £42m, a year-on-year rise of £1.3m.

Current affairs had the largest relative growth in first-run spend, increasing by 7% year on year to £5m. PSB spend on news programming for Scotland increased by 4%.

Figure 15: PSB spend on first-run UK-originated content for Scotland, by genre: 2017-2022 (£m)



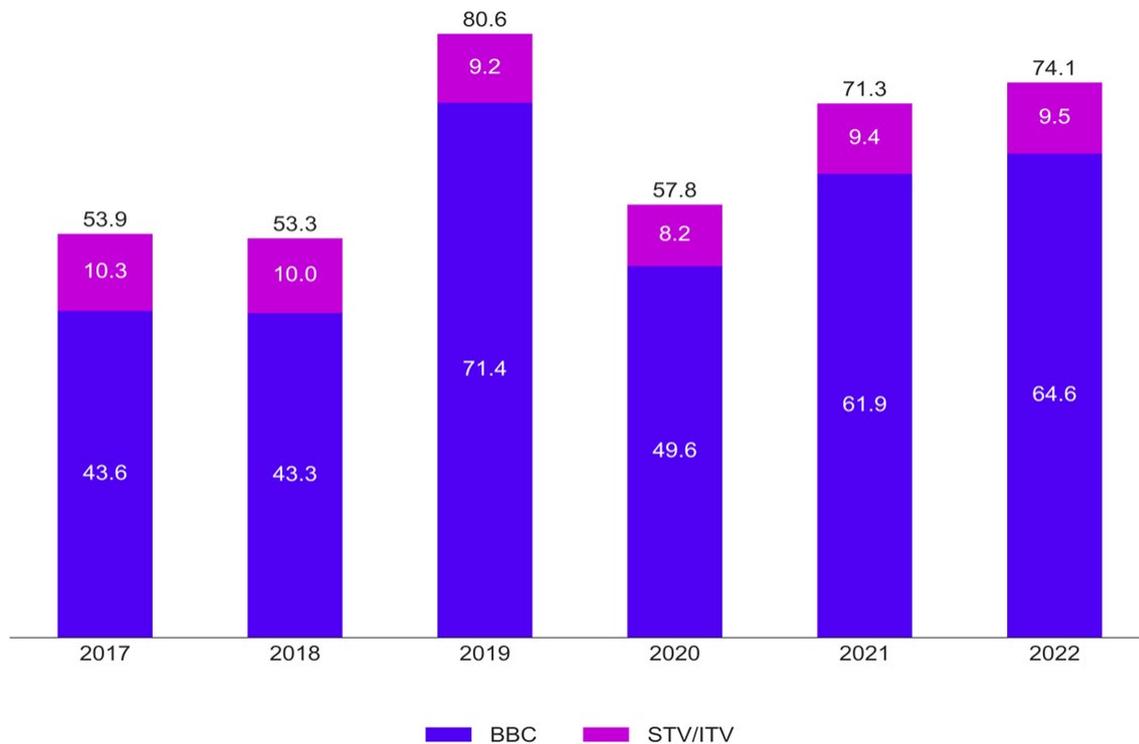
Source: Ofcom/broadcasters.

This increase in spend was driven by BBC Scotland in 2022

The vast majority of the spend on first-run programming for viewers in Scotland in 2022 was from BBC Scotland, at 87% of the £74.1m total. At £64.6m, BBC Scotland's spend for Scotland rose by 4% when compared to 2021.

The remaining £9.5m was spent on first-run programming across the Channel 3 services from STV and ITV1 for audiences in Scotland. This was a 1% increase on the 2021 figure of £9.4m.

Figure 16: BBC and STV spend on non-network first-run UK-originated content for Scotland: 2017-2022 (£m)

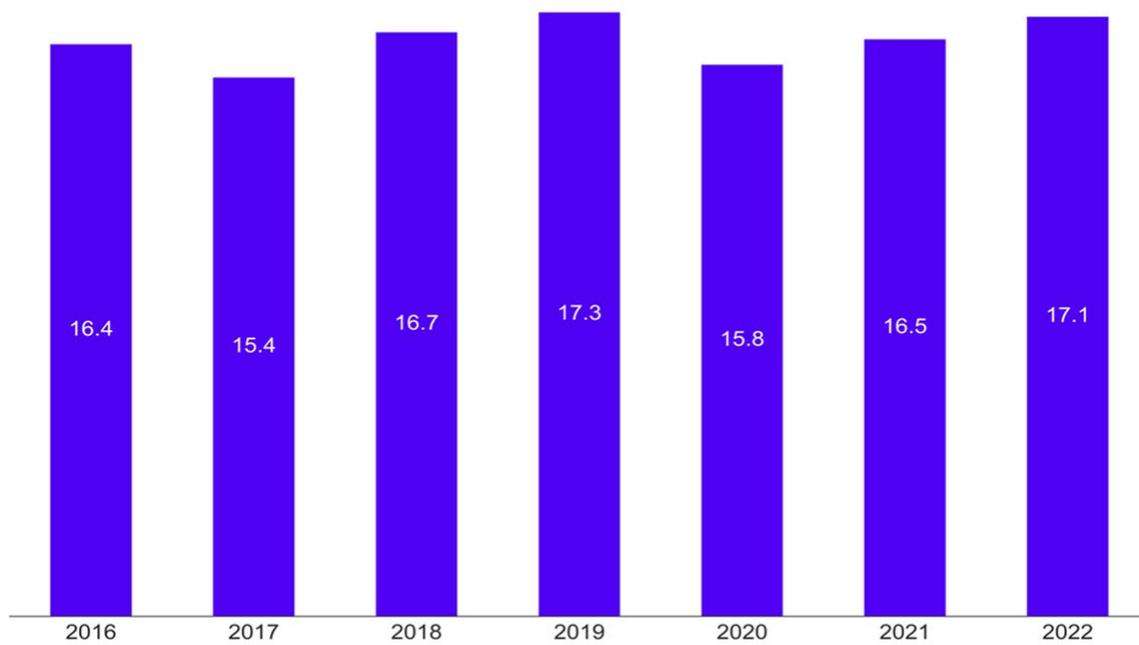


Source: Ofcom/broadcasters.

BBC ALBA spend on first-run content rose in 2022

BBC ALBA, the Gaelic-language channel run in partnership by MG ALBA and the BBC, spent £17.1m on first-run programming in 2022, an increase of approximately £0.6m compared to 2021. It broadcast 592 hours of first-run content in 2022, a decrease on 2021 (610 hours). Highlights included award-winning children's comedy *Triur aig Tri*; the documentary feature *Dùthchas*; and an evening of music from Celtic Connections with Niteworks and The BBC Scottish Symphony Orchestra: *Cuirm @ Celtic: Niteworks & SSO*.

Figure 17: BBC ALBA spend on first-run UK-originated content: 2016-2022 (£m)



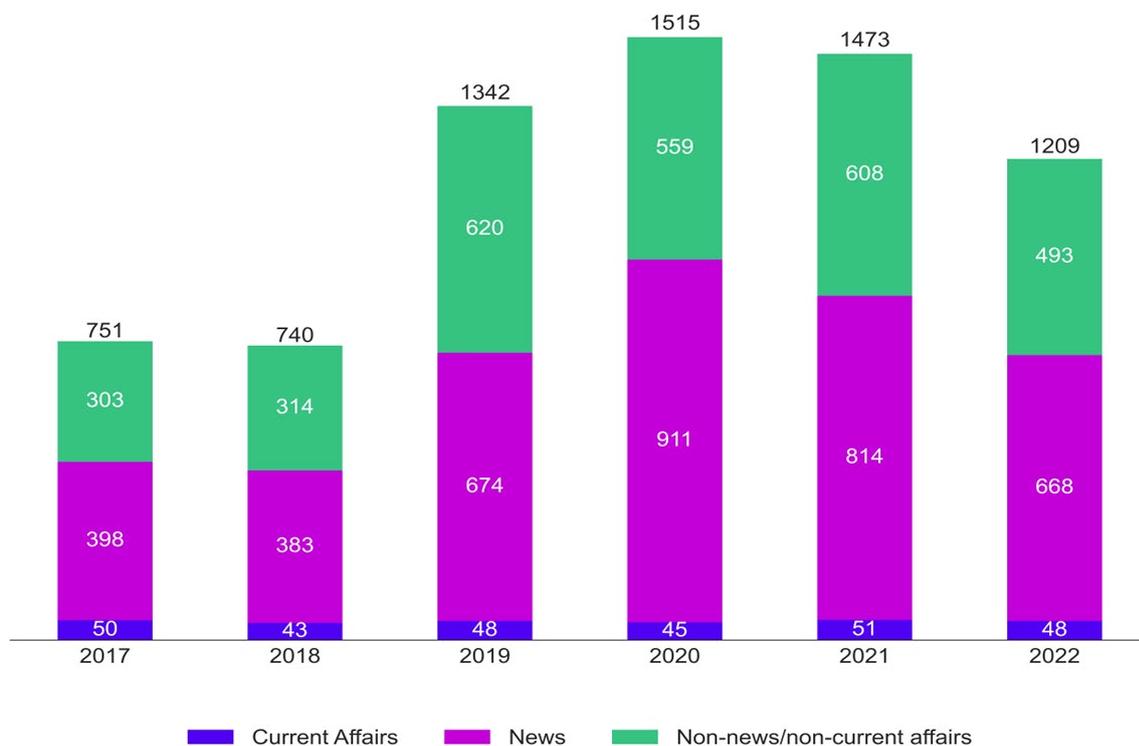
Source: Ofcom/broadcasters.

BBC hours of first-run content in Scotland dropped by 18% in 2022 to 1,209 hours

The largest proportional decrease has been for non-news/non-current affairs, dropping by 115 hours to 493 hours (19%). BBC Scotland saw a substantial rise in non-news/non-current affairs content broadcast in 2019 - 21 due to the showcasing of new content in BBC Scotland's first year of launch, and the broadcasting of *Bitesize Daily* across both 2020 and 2021, its week-day school curriculum programme that was shown during the lockdown. During the Covid pandemic, religious services were also broadcast on BBC Scotland through programmes such as *Reflections at the Quay* and *The Service*. The decline in hours in 2022 is largely a result of these programmes coming to an end.

Overall, news content makes up the largest amount of the BBC's output for Scotland, comprising 55% of first-run hours, which is unchanged since 2021. The hours of news content have also now returned to pre-Covid levels, following the end of the regular Covid news briefings that took place during the pandemic.

Figure 18: BBC hours of first-run UK-originated content for Scotland, by genre: 2017-2022



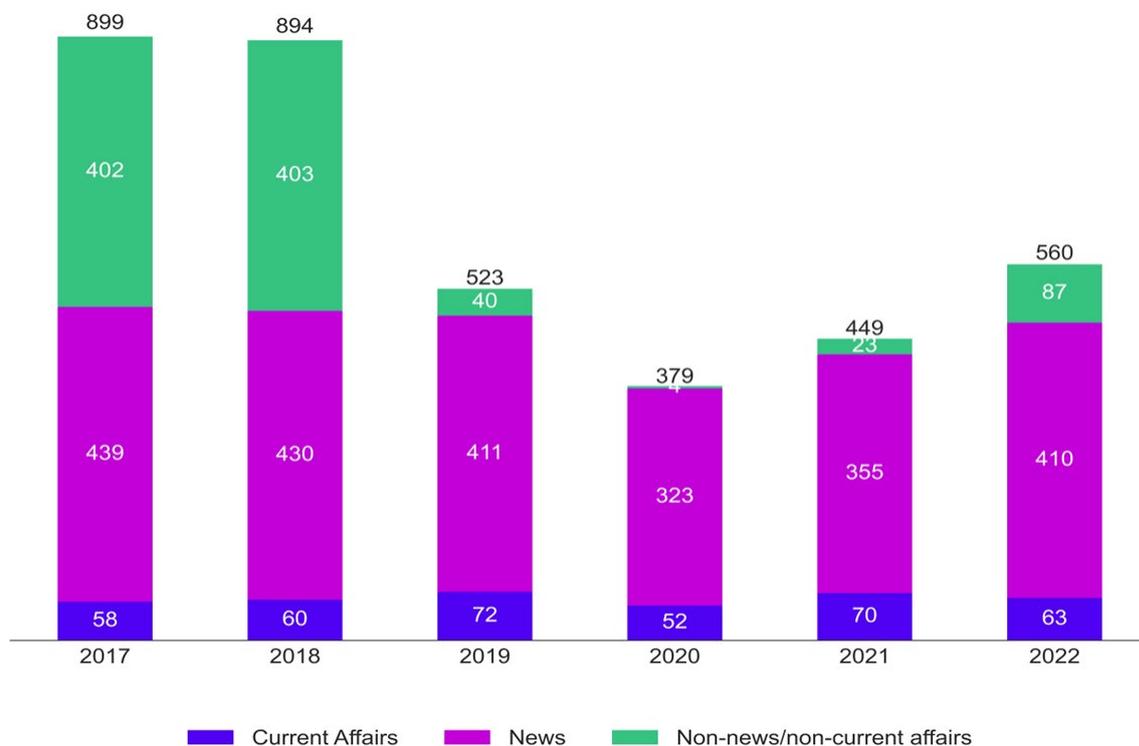
Source: Ofcom/broadcasters.

STV hours of first-run content for Scotland grew year on year, with 560 hours of programme output in 2022

The large majority of STV’s first-run output for viewers in Scotland is news content, comprising 73% (410 hours) of total output across both STV Central and STV North in 2022.

The overall increase in hours was driven by both news and non-news/non-current affairs programming. The largest rise was in non-news/non-current affairs output, which grew by 64 hours to reach 87 hours (up 278%) in 2022. This rise can largely be explained by the launch of overnight information programme *Night Vision*, while a return to pre-pandemic levels of the *STV News at Six* across both of STV’s licences accounted for the rise in news programming (15%).

Figure 19: STV hours of first-run UK-originated content for Scotland, by genre: 2017-2022



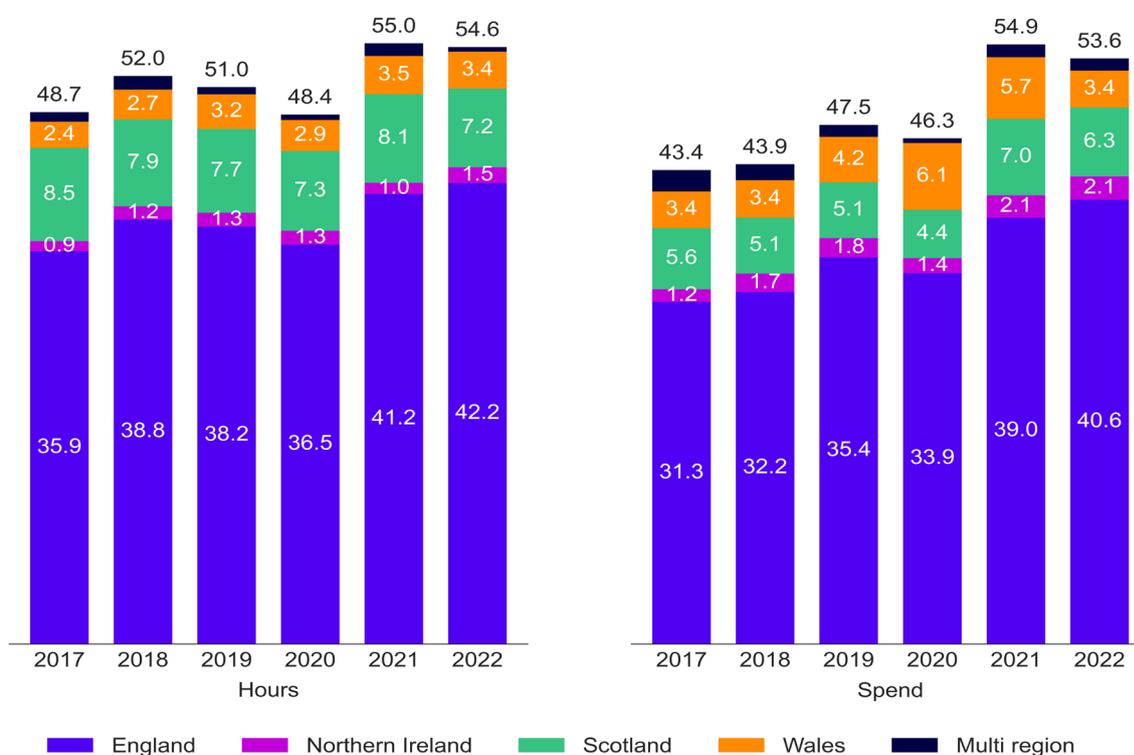
Source: Ofcom/broadcasters.

Network content produced in Scotland

Public service broadcasters must make programmes in a range of places around the UK that are broadcast for the first time on their network TV channels. The broadcasters have quotas relating to this, in terms of the proportion of qualifying hours and the proportion of qualifying spend that must be outside London. The BBC has individual quotas for each of the UK nations, and Channel 4 also has an out-of-England quota. ITV and Channel 5 are not specifically required to make content outside of England.

Across all the PSBs in 2022, 6.3% of qualifying first-run network spend was allocated to programmes qualifying as Scotland productions, and 7.2% of hours. This contributed to an overall drop in the proportion of both hours and spend produced outside London by the PSBs in 2022 – although absolute qualifying hours and spend figures for Scotland remained flat year on year.

Figure 20: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2017-2022 (%)



Source: Ofcom/broadcasters.

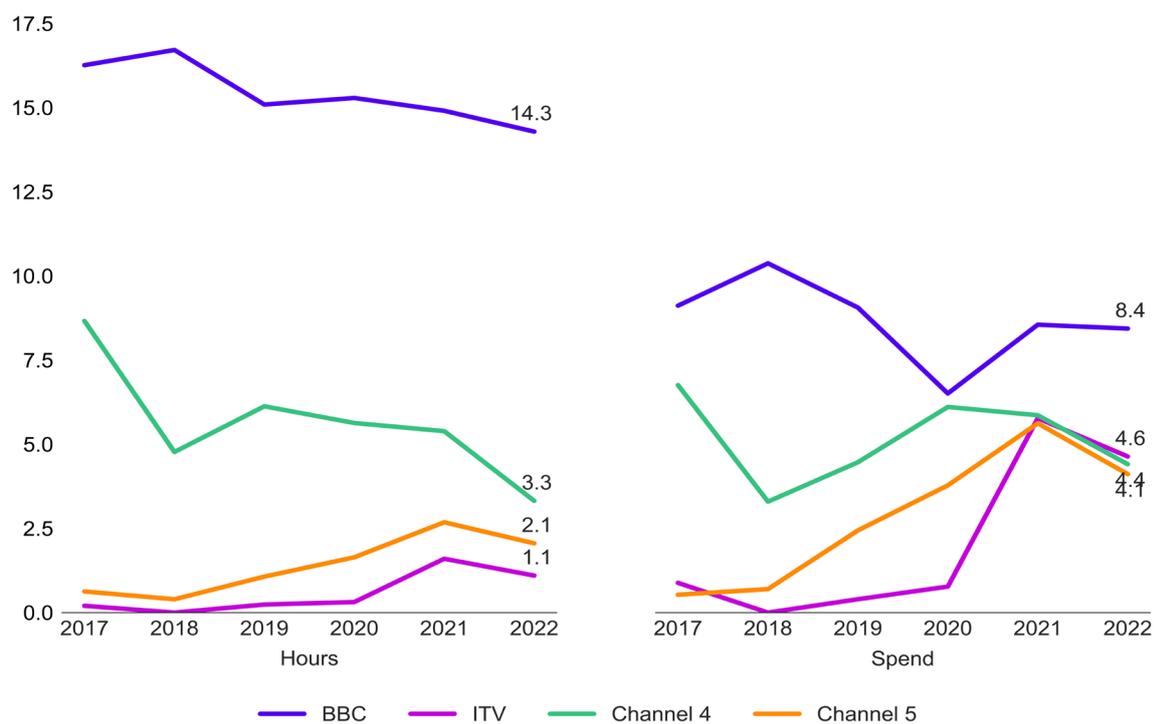
PSBs reduced the proportion of their network content made in Scotland in 2022

The BBC, which is responsible for the majority of qualifying network content made in Scotland, maintained levels of hours and spend for productions made in Scotland in 2022. However, this reduced as a proportion of total qualifying network hours and spend, with the proportion of spend falling by 0.2 percentage points to 8.4% in 2022, and the proportion of hours down by 0.6 percentage points to 14.3%.

The BBC network hours made in Scotland were generally well spread in terms of genre, although sports, entertainment and factual programming were particularly prevalent. Titles broadcast in 2022 included popular gameshows *Richard Osman's House of Games* and *Unbeatable*, filmed at the BBC's Pacific Quay in Glasgow, and new dramas *Control Room* and *Mayflies*. Hours of children's programming assigned as Scotland productions also increased in 2022, largely coming from the production of *Saturday Mash-Up!* moving to Pacific Quay.

Each of the commercial PSBs also reduced the proportion of their network spend and hours of Scotland-produced content in 2022. Titles on these channels included *Celebrity Catchphrase* on ITV1, documentary series *How Do They Really Do It?* on Channel 5, and *Screw* on Channel 4, which was filmed in Glasgow's Kelvin Hall and is [returning for a second series](#).

Figure 21: Proportion of qualifying network production in Scotland, by PSB: 2017-2022 (%)



Source: Ofcom/broadcasters.

3. Radio and audio

Market developments

Community Radio Fund

The Community Radio Fund supports the costs of running Ofcom-licensed community radio stations in the UK. Eligible stations broadcasting on AM, FM, or via a [C-DSP licence](#) on a digital radio multiplex can make an application for review by the [Community Radio Fund Panel](#). In the 2022-23 round of awards, £16,255 was awarded to Glasgow's Awaaz FM to recruit a business development manager, £13,874 to CamGlen in South Lanarkshire for an events worker, and Jambo! Radio was granted £23,188 for a growth manager to serve audiences across Glasgow, Edinburgh and Aberdeen.

Small-scale DAB (SSDAB)

The Glasgow SSDAB multiplex launched in August 2022 carrying 19 services, including Awaz FM Glasgow, Celtic Music Radio, BFBS Scotland, and Jambo! Radio. This was the second SSDAB multiplex to launch in Scotland; the first was the Edinburgh SSDAB multiplex, on 4 July 2022. Ofcom has also awarded SSDAB multiplex services for Inverclyde, Stirling & Falkirk, North Aberdeen, Glenrothes & Kirkcaldy, Berwickshire & North Roxburgh and East Fife, which all have 18 months in which to launch from the date of the award.

New local schedule for Global Radio

In May 2023 Global re-introduced a local network schedule for Heart Scotland and Capital Scotland. For the first time since 2019, both stations will broadcast full daytime schedules and weekend programming from Scotland, coming live from Global's broadcast centre on West Regent Street in Glasgow. Listeners in the Central Belt can tune in on FM and DAB with both services being available online across Scotland.

Greatest Hits Radio launches in Scotland

From April 2023, Bauer Radio rebranded seven of its heritage Scottish stations to form Greatest Hits Radio across Scotland. Tay 2 (Tayside), Forth 2 (Edinburgh, The Lothians, Fife and Falkirk), Clyde 2 (Glasgow and West Central Scotland), MFR 2 (Moray, Highland and Orkney), Northsound 2 (North East Scotland), West Sound (Ayrshire), and West Sound (Dumfries & Galloway) have all merged to form the new service with listeners still able to access the station through a mixture of AM, FM and DAB, as well as online, across the country. Greatest Hits Radio Scotland provides a mix of UK and Scottish programming alongside local news, weather and advertising.

The BBC celebrates 100 years in Scotland

This year marks 100 years of the BBC in Scotland, with its first radio broadcast having taken place on 6 March 1923. Aired from the attic of a building on Bath Street, Glasgow, listeners heard a pipe band playing the folk tune 'Hey, Johnnie Cope' before being told "*The Glasgow station of the BBC is calling*". To mark the centenary occasion, the BBC released a landmark documentary, held events across Scotland, and re-opened the 5SC call-sign. 1923 was also the year of the first Scottish

broadcast in Gaelic, when a fifteen-minute address was made by Reverend John Bain on 2 December 1923, recorded in the United Free Church in Aberdeen.

Availability and coverage of radio services

Radio services in Scotland are provided by the BBC and by the commercial and community radio sectors. The BBC’s UK-wide services are available throughout Scotland on terrestrial analogue and DAB radio. In addition, the BBC operates two Scotland-wide services, BBC Radio Scotland¹¹ and BBC Radio nan Gàidheal, which are broadcast on AM and FM. These services are also available via DAB in Scotland.

As of March 2023, there are two national commercial stations, 34 local commercial stations and 32 community radio stations broadcasting on AM/FM in Scotland. Forty-six national commercial and sixty-five local commercial services broadcast on DAB in Scotland, unchanged since last year.

Figure 22: Number of commercial and community radio services in Scotland, by broadcast technology as of March 2023

	AM/FM	DAB
UK-wide commercial	2	46
Local commercial	34	65
Community	32	N/A

Source: Ofcom. Note: the number of services on commercial multiplexes listed here includes all commercially-licensed services carried on each multiplex, so a service may be counted more than once. Not all services are available in each location. Community Radio licences are analogue licences, but holders of these licences may also hold a commercial DSP (digital sound programme) licence to simulcast their licensed Community Radio service on a DAB multiplex. The data in the table relates to UK-wide and local multiplexes only. Community-DSP (C-DSP) licences allow for a community radio service to be broadcast on a designated small-scale DAB multiplex.

¹¹ BBC Radio Scotland includes local content opts for parts of Scotland at certain times of the day e.g. BBC Radio Shetland.

Figure 23: DAB coverage as of March 2023

		BBC		Commercial		Small-scale
			Digital One	Sound Digital	Local DAB	
UK	Homes	97.4%	91.7%	82.6%	92.0%	13.8%
	Major roads	87.4%	80.2%	72.6%	76.8%	NM
England	Homes	98.4%	94.8%	86.7%	93.4%	12.8%
	Major roads	94.5%	93.9%	89.8%	87.4%	NM
Scotland	Homes	95.3%	81.7%	69.0%	85.4%	24.9%
	Major roads	69.1%	45.5%	33.6%	45.6%	NM
Wales	Homes	92.2%	67.5%	56.9%	82.6%	15.5%
	Major roads	78.1%	53.3%	37.7%	60.9%	NM
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%	5.6%
	Major roads	79.3%	86.9%	55.0%	87.8%	NM

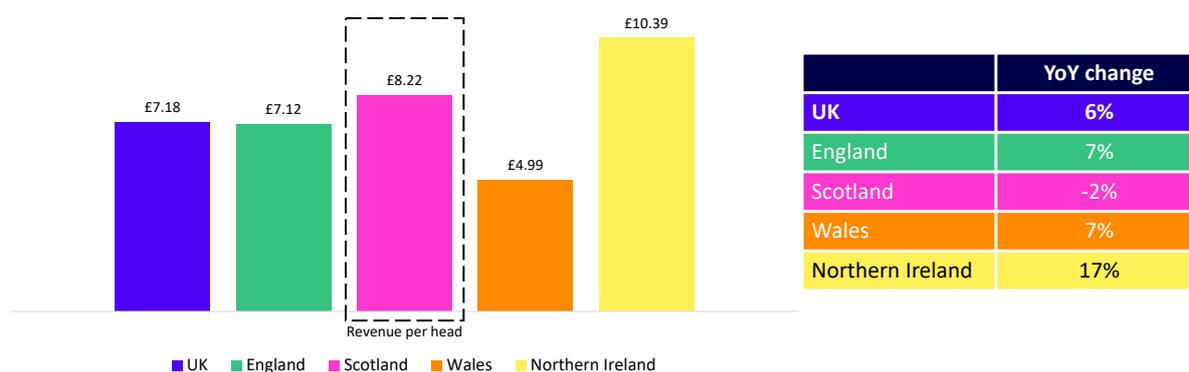
Source: Arqiva, BBC, Ofcom. Note: Coverage of SSDAB is measured on a homes basis only. 'NM' denotes levels are not measured.

Commercial radio revenues

Per-capita commercial radio revenues fell in Scotland between 2021 and 2022

Per-capita commercial local radio revenues in Scotland fell by 2% between 2021 and 2022. Despite this, at £8.22 per person, per-capita revenues in Scotland continued to be higher than the UK average, and higher than England and Wales.

Figure 24: Per-capita commercial radio revenues, by nation: 2022 (£)



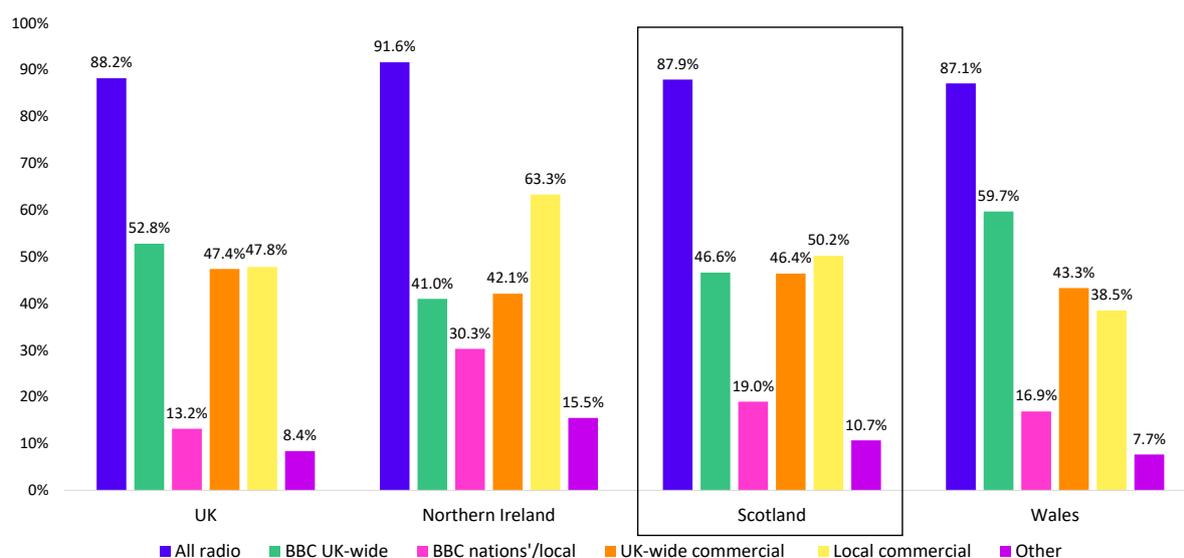
Source: Ofcom, Broadcaster returns. These figures solely relate to relevant turnover reported against AL licences (local analogue commercial) and include local and national revenues and sponsorship, i.e., these revenues do not relate to adverts aimed only at the specific nation. As mid-year 2022 population estimates for were not available at the time of publication, 2021 mid-year population data has been used for both 2021 and 2022.

Radio listening in Scotland

Almost nine in ten adults tune into live radio across Scotland, for an average of 18.8 hours each week

Figure 25 shows the reach of the different broadcast sectors and how they vary by nation. Eighty-eight per cent of people aged 15+ in Scotland (4 million) listen to the radio each week: lower than in Northern Ireland but in line with the UK overall. Half (50.2%) listened to local commercial stations each week in Q1 2023, a higher proportion than the UK overall (47.8%), while just under a fifth (19%) listened to BBC nations'/local stations. This was higher than the UK average of 13.2% but much lower than Northern Ireland, where about a quarter of the population listen to BBC Radio Ulster each week.

Figure 25: Weekly reach of radio, by sector and nation: Q1 2023

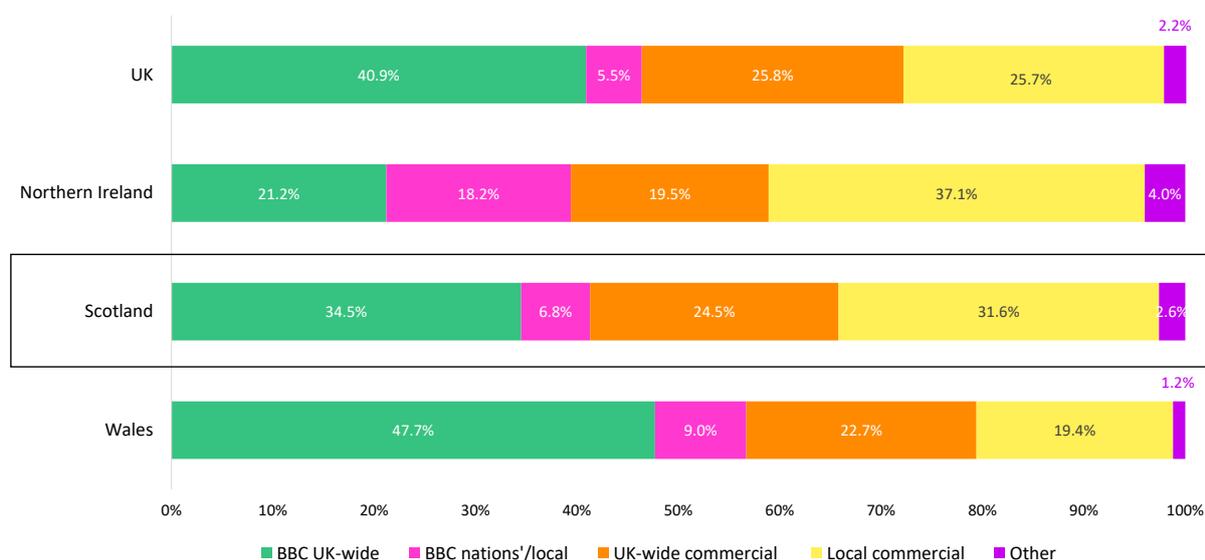


Source: RAJAR Q1 2023; All radio TSA, BBC Radio Ulster TSA, BBC Radio Scotland TSA, BBC Radio Wales TSA.

Commercial radio continues to perform well in Scotland

Commercial radio accounted for the majority (56.1%) of total radio listening across Scotland in Q1 2023, five percentage points higher than across the UK as a whole. Of this listening, the majority was to local commercial stations such as Tay FM, Original 106 and Nation Radio Scotland, with UK-wide commercial services faring less well by comparison (as illustrated in Figure 26).

Figure 26: Share of radio listening, by sector and nation: Q1 2023



Source: RAJAR Q1 2023; All Radio; BBC Radio Ulster TSA, BBC Radio Scotland TSA; BBC Radio Wales TSA; six-month weighting.

Drilling down to a regional level, there is variation across Scotland in the services people listen to. Across the Central Belt, local commercial stations made up three of the top five most-listened-to

services in Q1 2023, while BBC UK-wide stations featured much more prominently in the North of Scotland.

Figure 27: Top five stations in selected Scotland TSAs, ranked by market share: Q1 2023

Rank	Across Scotland		Central Belt		North of Scotland	
	Station	Market share %	Station	Market share %	Station	Market share %
1	BBC Radio 2	14.3	Clyde 1	11.1	BBC Radio 2	25.1
2	Clyde 1	7.2	BBC Radio 2	10.3	MFR	14.8
3	BBC Radio 4	7	Forth 1	7.8	BBC Radio 4	9.9
4	BBC Radio Scotland	6.7	BBC Radio Scotland	6.1	BBC Radio 1	9.5
5	Forth 1	4.9	Greatest Hits Radio (Glasgow & the West)*	3.4	BBC Radio Scotland	8.2

Key	BBC UK-wide	BBC nations / local	UK-wide commercial	Local commercial

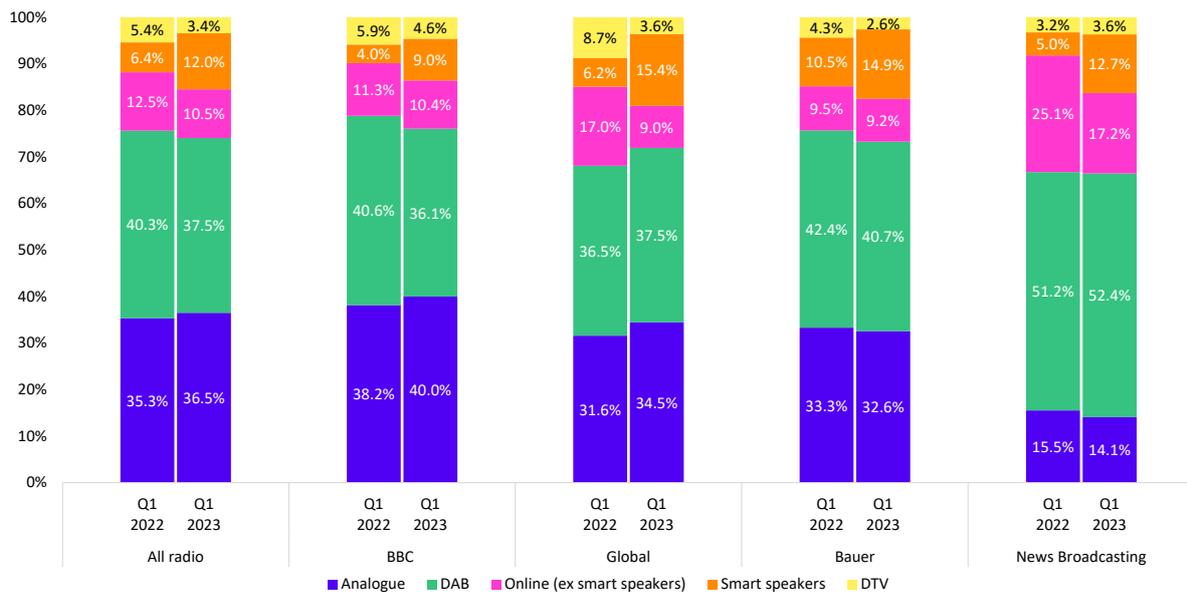
Source: RAJAR Q1 2023; BBC Radio Scotland TSA; Capital Scotland TSA; Greatest Hits Radio North Scotland TSA (Inverness); six-month weighting. *formerly Clyde 2.

Radio listening via smart speakers in Scotland has doubled in the past year to 12% of all radio hours

The gradual shift to online listening continues, with smart speakers, smartphones and other internet-enabled devices now accounting for a fifth (20.5%) of all radio listening in Scotland. Over half of all online listening to radio is via smart speakers, which have nearly doubled their overall share in the past year from 6.4% to 12%. This figure is higher for the commercial broadcasters Global (15.4%), Bauer (14.9%) and News Broadcasting (12.7%), and lower for the BBC at 9%.

However, amidst this growth in online listening, analogue radio remains widely listened to in Scotland: AM/FM accounted for 36.5% of listening in Q1 2023, with similar shares for the BBC, Global and Bauer stations. The figure was much lower for the News Broadcasting group, as most of its stations are not available on analogue. DAB continues to account for the majority of listening to Times Radio and Virgin Radio, although again it is worth noting that smart speakers' share of listening to these stations has more than doubled in the past year (from 5.0% to 12.7%).

Figure 28: Share of radio listening by platform of each main broadcaster group: Scotland



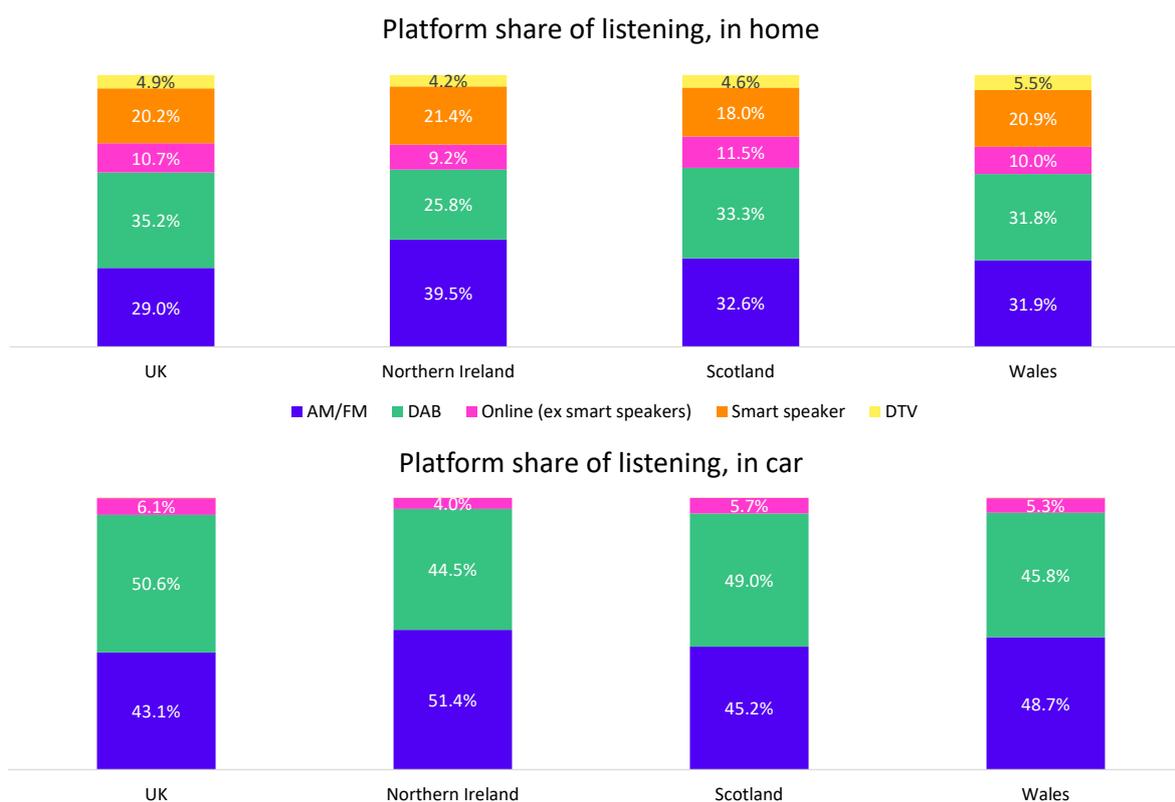
Source: RAJAR, BBC Radio Scotland TSA.

Almost a quarter of time spent listening to the radio in Scotland is in cars or vans, but the majority is within the home

The location of listeners also affects what platforms they use to listen. Almost two-thirds of radio listening in Scotland takes place at home (62%), while about a quarter (24%) is in cars or vans and a smaller amount (15%) is at work.

In cars, just under half (49%) of listening is via DAB, 45% is AM/FM and 6% is online – broadly in line with the figures for the UK overall. With more devices and ways of listening to the radio at home, it is not surprising that the DAB and AM/FM figures drop to about a third each, with smart speakers and other online devices accounting for just over a third (34%) of in-home radio listening in Scotland.

Figure 29: Platform share of in-home and in-car listening, by nation: Q1 2023



Source: RAJAR Q1 2023; All radio TSA, BBC Radio Ulster TSA, BBC Radio Scotland TSA, BBC Radio Wales TSA.

Online listening in Scotland

Just over half of all households in Scotland have a smart speaker, higher than any other UK nation

Just over half of households (53%) in Scotland have a smart speaker – the highest of the UK nations.¹² The Amazon Echo is by far the most popular brand, with just over four in five homes (82%) with smart speakers having one of these, followed by the Google Home / Google Nest at 15%.¹³ The most popular place to have a smart speaker is the living room, with 62% of all smart speaker owners having one here, followed by the kitchen (39%) and bedroom (35%).¹⁴

The location of devices can influence how people use them, and vice versa. Over two-thirds of smart speaker users in Scotland (69%) said they used it to listen to live radio, higher than the UK average of 58%, and just under half (48%) used it for listening to music via a music streaming service. The next

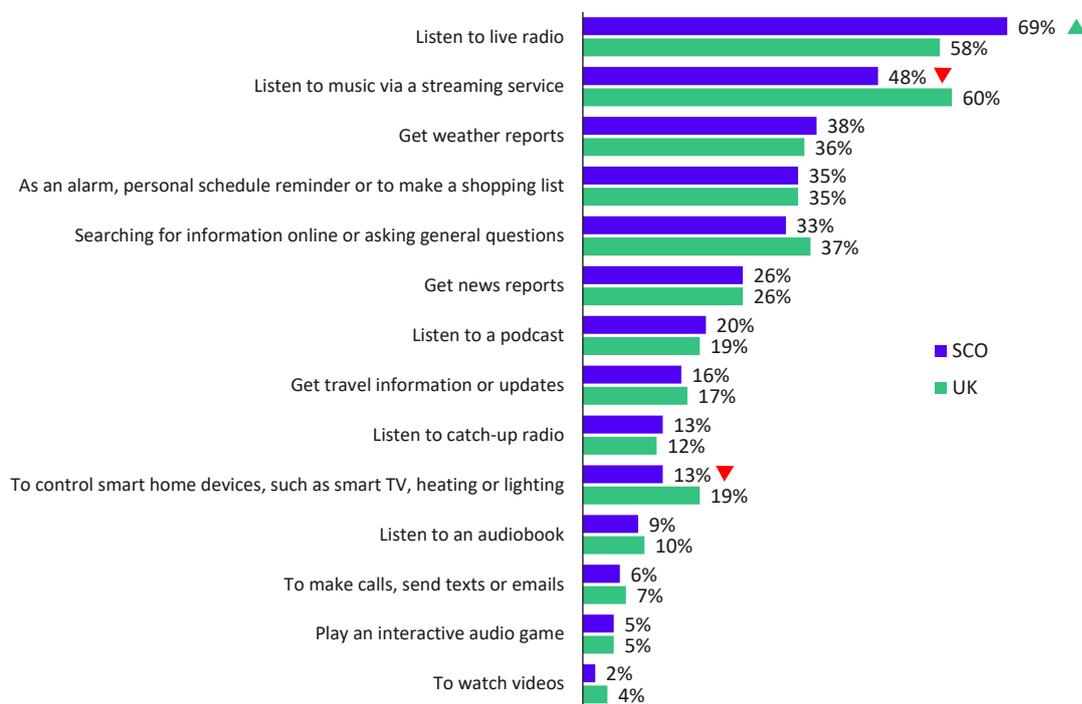
¹² Ofcom [Technology Tracker 2023](#); Base: All Respondents (UK weighted base: 3997, Scotland weighted base: 360)

¹³ Ofcom [Technology Tracker 2023](#); Base: Where have a smart speaker or smart display (UK weighted base: 1679, Scotland weighted base: 192)

¹⁴ Ofcom [Technology Tracker 2023](#); Base: Where have a smart speaker or smart display (UK weighted base: 1679, Scotland weighted base: 192)

most common uses of smart speakers were for getting weather reports (38%), using them as an alarm or personal reminder (35%) and searching for information (33%).

Figure 30: Smart speaker activities in Scotland: 2023



Source: Ofcom Technology Tracker 2023 QS7: Thinking of your household’s smart speaker, which of the following functions do you personally use your smart speaker for? Base: Where personally use a smart speaker or smart display (Scotland weighted base: 168) Arrows indicate statistically significant differences compared to the UK figures at the 95% confidence level.

More than a third (36%) of households in Scotland have a DAB radio at home and 57% have one in the car, taking total household penetration of DAB radios to 68%.¹⁵ Ofcom will soon be publishing findings from quantitative research commissioned to assess the penetration and use of DAB+ radio in home and in cars. DAB+ is the latest technology for digital audio broadcasting and is more efficient than standard DAB.

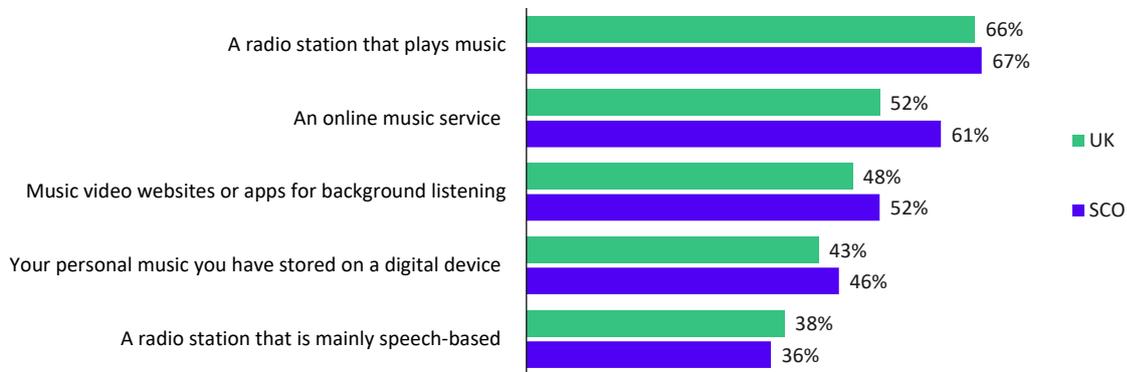
Six in ten adults in Scotland listen to an online music service each week

Looking more broadly at all forms of audio across devices, we see that online music services (such as Spotify, Apple and Amazon) are the next most popular audio format after listening to music radio. Just over two-thirds of adults in Scotland listen to music radio (67%) and six in ten (61%) listen to an online music service at least once a week. Although there are slight variations, there are no

¹⁵ Ofcom [Technology Tracker 2023](#); Base: All Respondents (UK weighted base: 3997, Scotland weighted base: 360)

statistically significant differences in weekly audio listening in Scotland compared to the UK as a whole.

Figure 31: Top five weekly audio activities by reach, adults age 15+ in the UK vs Scotland: 2023

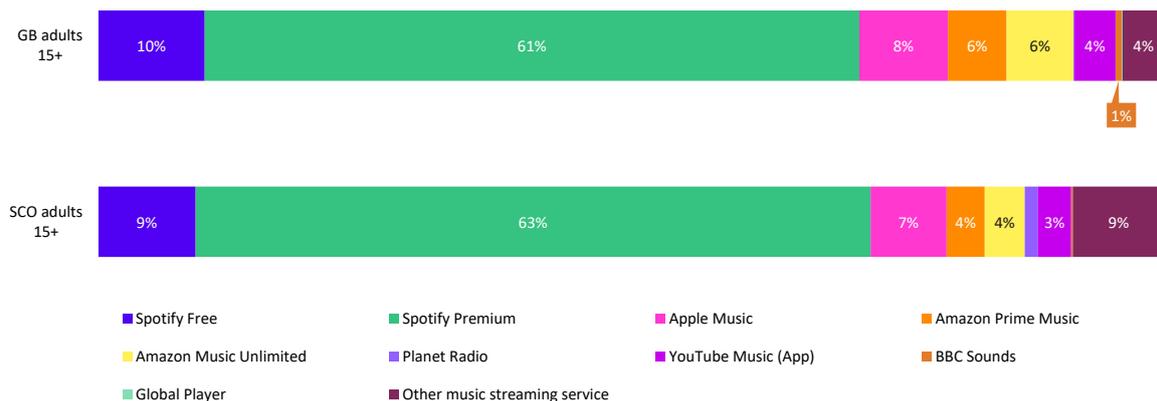


Source: Ofcom Audio Survey 2023. Q1 How often, if at all, do you listen to any of the following? Base: All Adult respondents 2259 (UK) 188 (Scotland) NET: Weekly.

Spotify has the largest share of time spent streaming music

Nearly two-thirds of time spent streaming music is spent listening to Spotify (72%) and the majority of that is to Spotify Premium. Adults in Scotland also spend more of their time listening to non-mainstream music streaming services, shown below under 'Other', than the average across Great Britain. This includes services such as Soundcloud, TuneIn, Deezer and Tidal, as well as the YouTube main site.

Figure 32: Share of time spent music streaming, by platform, adults 15+ in Scotland vs. GB adults: 2023



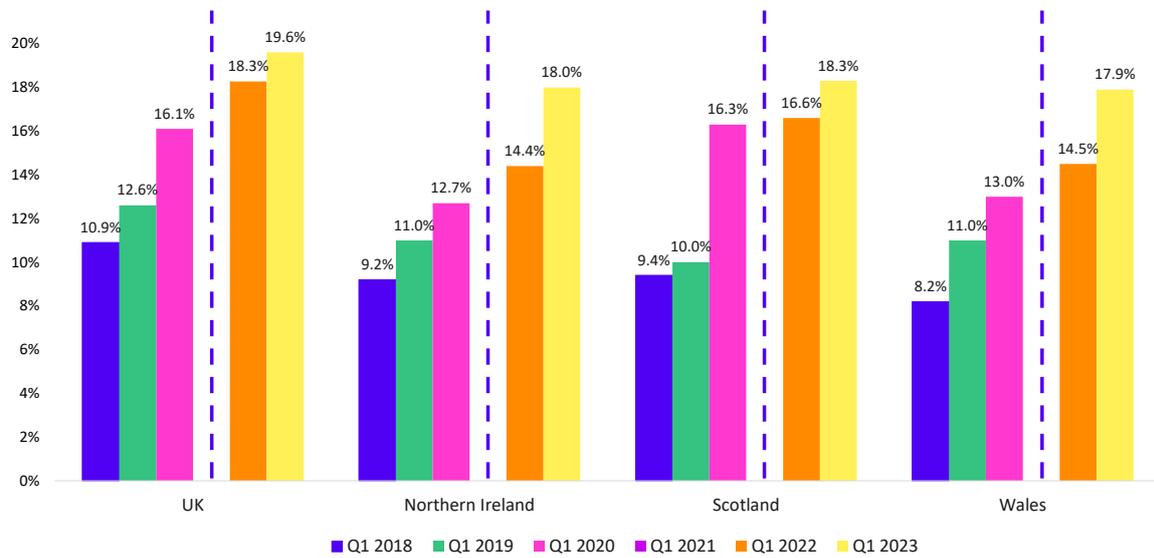
Source: IPA TouchPoints wave 1 2023 (Jan-April).

More people are listening to podcasts, but less than one in five adults listen each week

Podcasts are slowly but surely becoming part of the audio diet, with nearly one in five (18.3%) adults in Scotland listening to them once a week in Q1 2023. This is slightly less than the UK reach figure of

19.6%, but still approximately double the 2018 figure (9.4%) and 1.7 percentage points higher than a year ago.

Figure 33: Weekly reach of podcast listeners, by nation: 2018-2023



Source: RAJAR; dotted lines indicate suspension of fieldwork and change in methodology. Comparison with previous quarters should be made with caution.