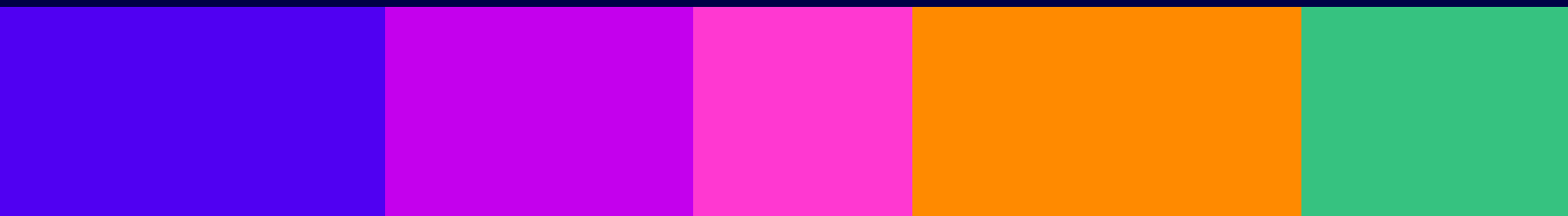




Media Nations

Scotland 2026

Published 29 July 2026



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Overview

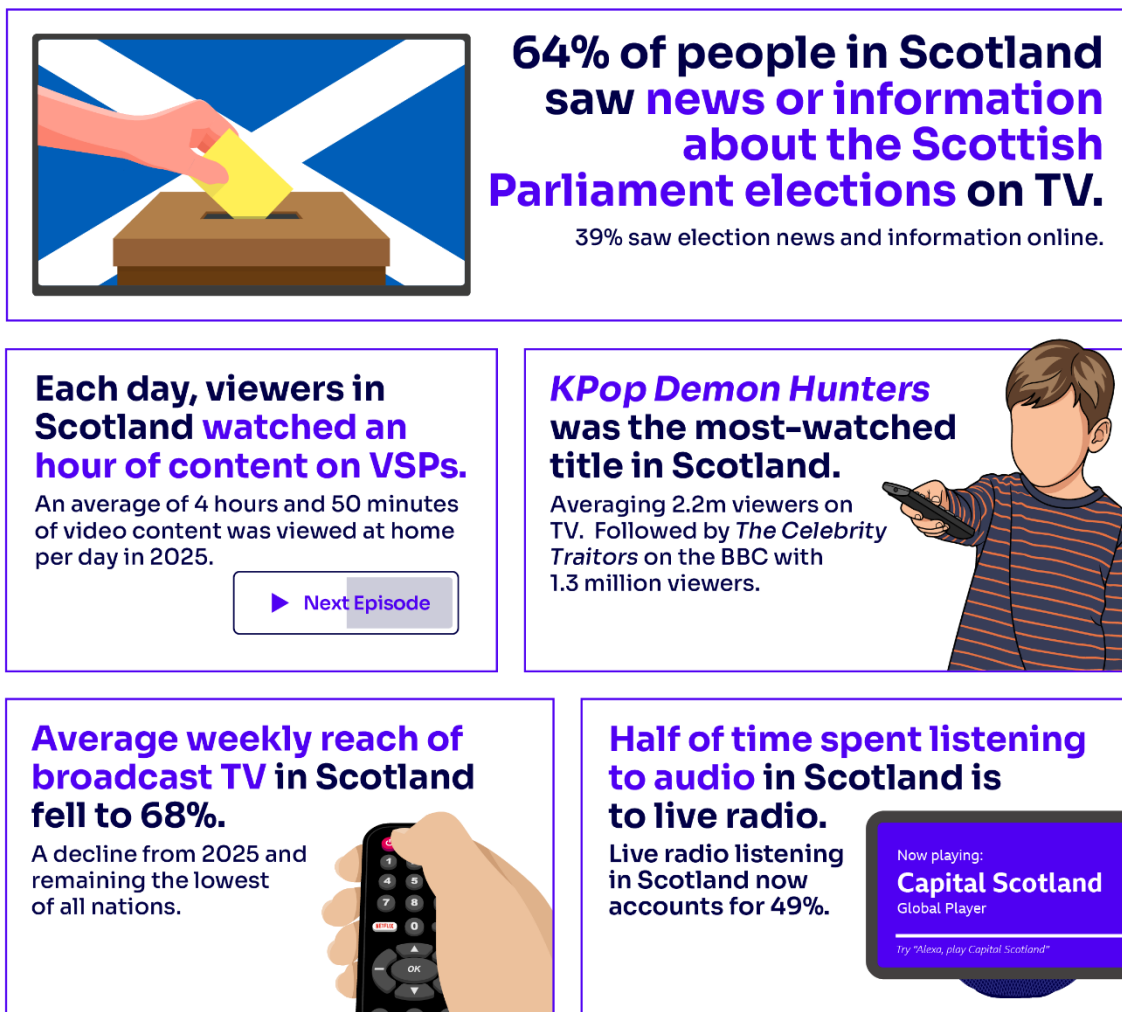
Introduction

This *Media Nations: Scotland* report examines key trends across the media sector and explores how audiences in Scotland are served. We take a cross-platform approach, covering broadcast TV and radio alongside digital services such as online video and audio streaming.

New this year, the report also includes analysis of device ownership and broader media consumption habits, providing context for our assessment of the TV & video and radio & audio sectors. The report draws on a range of data sources, including information collected directly from licensed television and radio broadcasters (covering output, spend and revenue), Ofcom's own consumer research, and Barb and RAJAR data (for audience consumption).

In addition to this Scotland report, separate Media Nations reports are published for the UK as a whole, Northern Ireland and Wales.

Key findings



Media in context

Introduction

People consume a wide range of media, across multiple formats and devices. In this section we draw from a range of data sources to examine device ownership and media consumption by people in Scotland, providing a background to our analysis of the TV & video and the radio & audio sectors.

News is essential for keeping people informed about their local area, Scotland, the UK and beyond. We explore the sources of news for people in Scotland and also present findings on people's use of news in relation to the 2026 Scottish Parliament elections.

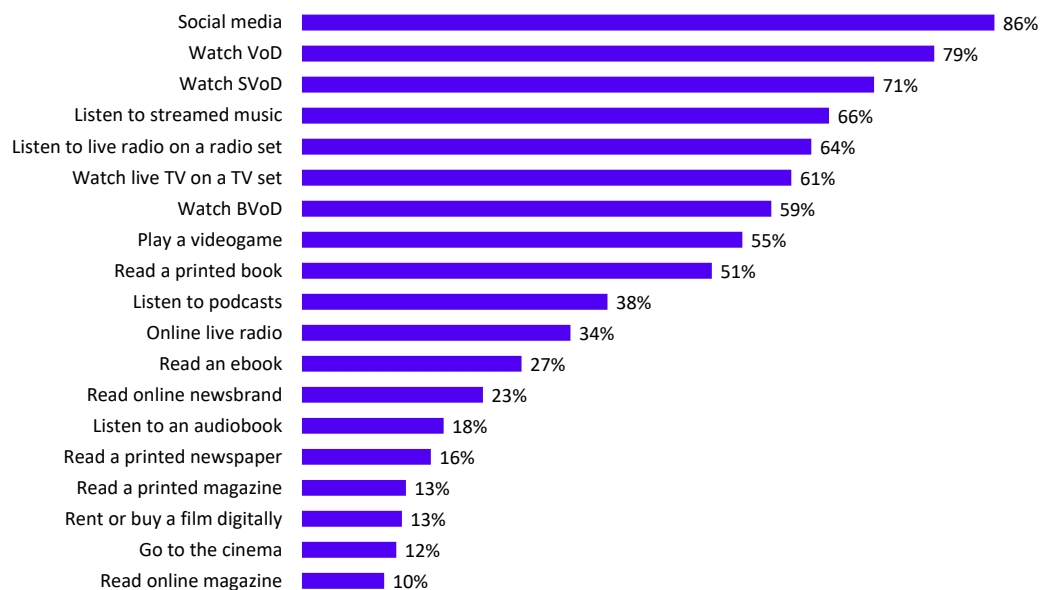
Media and devices

Social media and video on demand services are the most popular media activities among adults in Scotland

People engage in a wide range of media activities. Among our list of selected media activities, including broadcast media, printed media and media services delivered via the internet, social media has the highest reach, with 86% of adults in Scotland using it at least once a month.¹ Just under eight in ten (79%) watch any video-on-demand (VoD) service, with 71% watching a subscription video-on-demand (SVoD) service. Two-thirds of adults in Scotland listen to a music streaming service at least monthly, with 64% listening to live radio via a radio set. Over half of adults in Scotland play a videogame (55%) or read a printed book at least once a month (51%) – higher than the numbers listening to a podcast (38%).

¹ We use monthly reach figures here from the IPA Touchpoints survey as this enables us to compare reach between different types of media. These may differ from, and not be directly comparable to, other media-specific or industry reach figures in this report such as those for TV (Barb) and radio (RAJAR).

Figure 1: Monthly reach of selected media activities by adults in Scotland: 2026



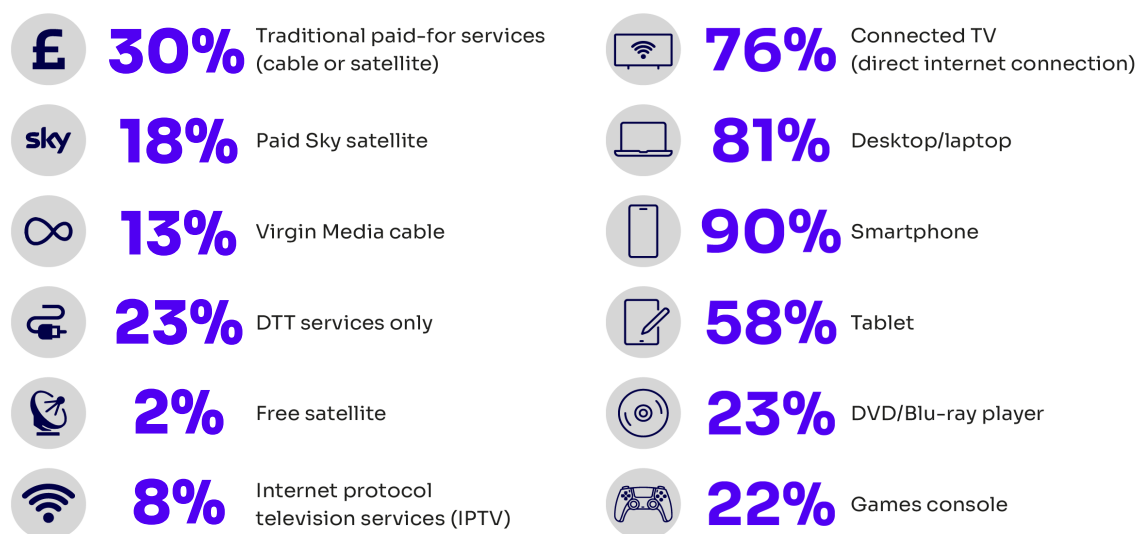
Source: IPA TouchPoints SuperHub 2026

The proportion of households in Scotland receiving paid-for cable or satellite services fell to 30%

In Q1 2026, at least one working TV set was present in 92% of households in Scotland, in line with the UK average of 93%. The proportion of households receiving traditional paid-for satellite or cable services fell from 38% in Q1 2025 to 30% in Q1 2026. Consequently, Scotland fell from its position as the UK nation with the highest proportion of households receiving these services and is now level with the UK average of 30%. The proportion of households receiving Sky satellite (18%) and those receiving Virgin Media (13%) both fell compared to the same period in 2025 (Sky: 23%, Virgin: 16%) but the proportion of homes receiving Virgin Media remained ahead of the UK average of 10%.

The proportion of households receiving IPTV services doubled from 4% in Q1 2025 to 8% in Q1 2026. EE TV (4%) and Freely (3%) were the most widely received IPTV services.

Figure 2: Take-up of TV platforms in Scotland: Q1 2026



Source: Barb Establishment Survey Q1 2026. 'DTT services only' means households with an aerial only and not cable, satellite or IPTV. IPTV includes EE TV, TalkTalk, YouView, Sky Stream and Freely.

Ownership of connected TVs and other connected devices

Nine in ten households (90%) in Scotland had a smartphone, broadly in line with the UK average of 92%. Three in four households (76%) had at least one TV connected directly to the internet,² also close to the UK average of 72%.

Games console ownership³ stood at 22%, behind the UK average of 25%, and PlayStation consoles were the most common, in 14% of households. DVD or Blu-ray players were also less widely owned than in the wider UK. They were present in just under a quarter of households (23%), compared with the UK average of 28%.

Broadband in Scotland

There continues to be sustained improvement in internet connectivity across Scotland, using a range of technologies, according to our [Connected Nations](#) reports. As of January 2026, 97% of residential premises in Scotland are in areas able to access superfast broadband with download speeds of at least 30 Mbit/s, up from 96% in January 2025. Full-fibre broadband – offering the fastest speeds – is now available to 75% of Scottish households (up from 67%), with a notable increase in take-up among these households in the past year (up from 39% to 47%). More Scottish households are also using satellite connectivity, particularly in harder-to-reach rural areas, with the number of Starlink subscribers rising to over 15,000 in 2025 (11,000 in 2024).

² This does not include TVs connected via other devices such as a dongle or games console.

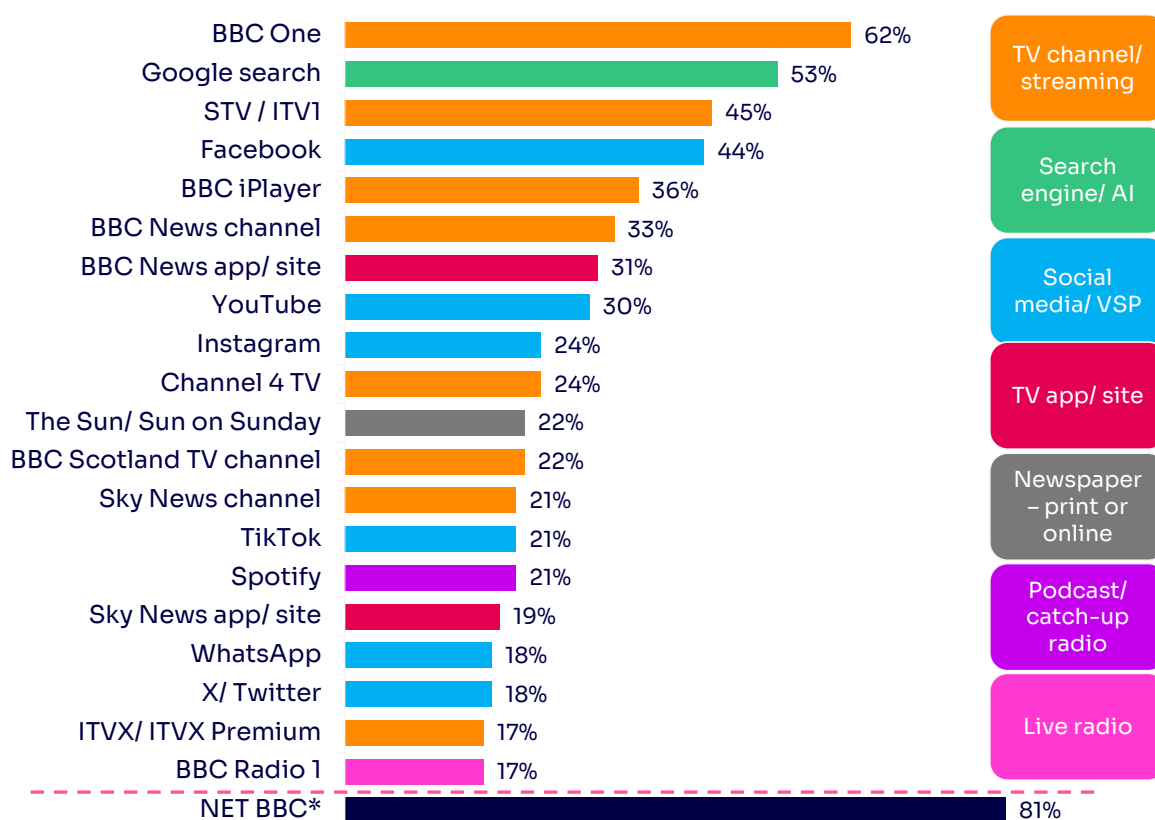
³ Includes PlayStation 2/3/4/5, XBOX/360/One/Series S/Series X, or Nintendo Wii/Wii U/Switch/other.

News

BBC One is the most used way to access news in Scotland

Ofcom's News Consumption Survey found that 62% of people aged 16+ in Scotland reported using BBC One for news, making it the most used way to access news. Facebook was the most popular social media platform used for accessing news, with 44% of people in Scotland reporting having used it for this reason in the past month. BBC News online was the most commonly used broadcaster app or site for accessing news, used by 31% in the past month, while The Sun / Sun on Sunday was the most used newspaper brand, used by 22% to access news in the past month. BBC Radio 1 was the only radio station to feature in the top 20 individual ways of accessing news in Scotland, used by 17% of adults. Overall, 81% of people in Scotland used at least one BBC source for news.

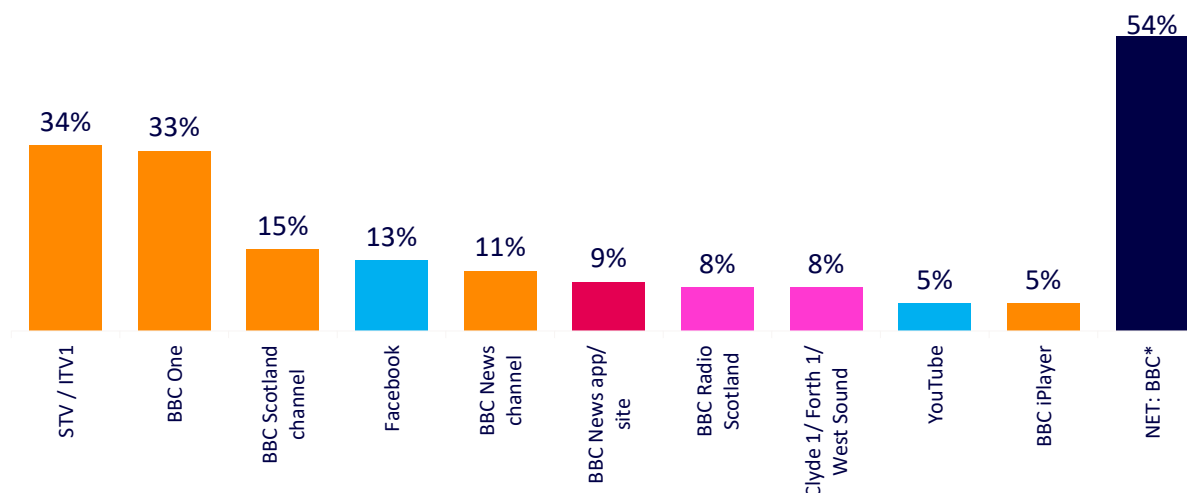
Figure 3: Top 20 ways to access news in the past month in Scotland: 2026



Source: Ofcom News Consumption Survey 2026. Question: D1-D22. Which, if any, of the following [MEDIA TYPE] have you seen or heard news on in the last month? *NET BBC includes BBC TV/ BBC iPlayer, BBC apps/ sites, BBC Radio, BBC Sounds. Base: All adults in Scotland (600).

When people were asked how they access news about Scotland, TV was the most cited. STV/ITV1 and BBC One were equally ranked as the top sources named by those in Scotland for news about Scotland. The BBC Scotland TV channel followed with 15% using it for news about Scotland. Fifty-four percent of people in Scotland used at least one BBC source for news about Scotland.

Figure 4: Top ten ways to access news about Scotland, in Scotland



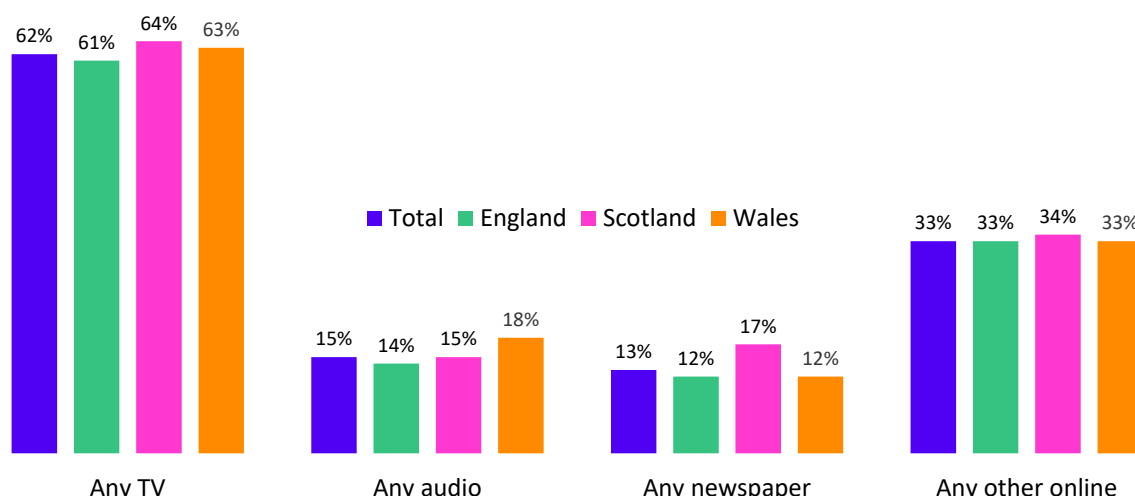
Source: Ofcom News Consumption Survey 2026. Question: F2. Looking at all of the sources of news that you have seen or heard news on in the last month, which of these have you seen or heard news about what is going on in Scotland? *NET BBC includes BBC TV/ BBC iPlayer, BBC apps/ sites, BBC Radio, BBC Sounds. Base: Scotland (600).

Over three in five people in Scotland aware of the 2026 elections had seen news or information about it on TV

On 7 May 2026, elections were held for the Scottish Parliament, the Senedd Cymru and 136 local authorities and five mayoralities in some parts of England, the largest set of elections in the UK since the 2024 General Election.

Scotland went to the polls to elect 129 Members of the Scottish Parliament (MSPs). Our research found that 97% of adults in Scotland were aware of the elections taking place for the Scottish Parliament. Overall, 64% of people in Scotland aware of the elections had seen news and information about the elections on TV, with 34% seeing election news and information online.

Figure 5: Platforms where news and information about elections on 7 May 2026 was seen

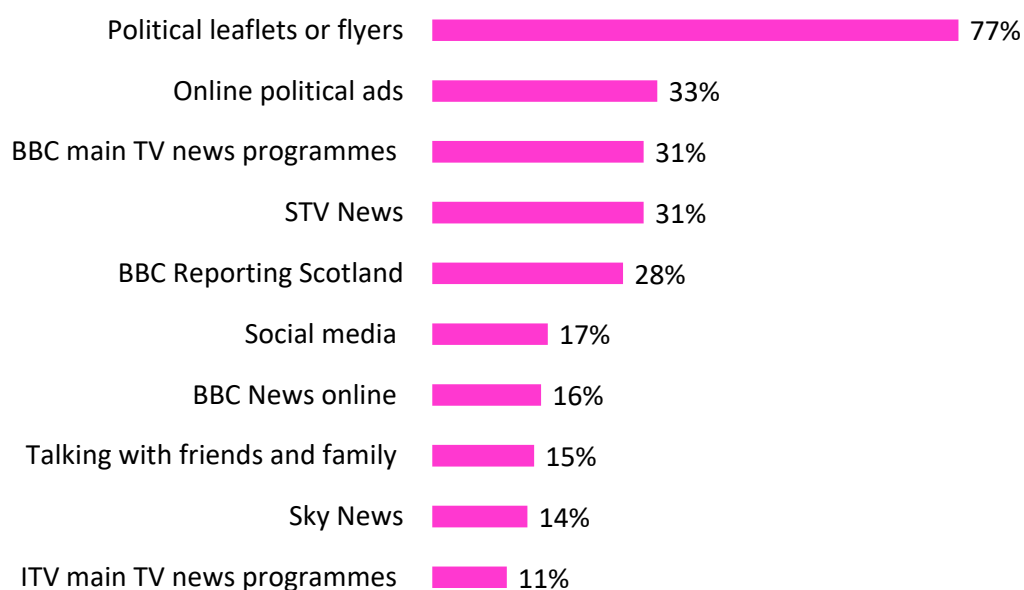


Source: Ofcom Local Election Survey. Question Q3A. Thinking about the weeks leading up to the [election] through which of the following sources, if any, did you see news and information about the election? Base: all aware of elections (5550), all aware of elections in England (3566), Scotland (1007), Wales (977).

Over three-quarters (77%) of people reported a political leaflet as a source of news or information. Online political ads were also a core part of the mix in informing people in Scotland about the May elections (33%). There were higher levels of awareness gained about the election in Scotland from online political ads than in Wales or the English regions undergoing elections.

News about the elections was prominent on television, seen by 64% of those in Scotland aware of the election, although viewing was fragmented across multiple TV news programmes, with viewing split between STV News (31%), BBC main TV news programmes (31%), *BBC Reporting Scotland* (28%) and others. Looking at other ways to access news, 17% had seen election news and information on social media, 16% through BBC News online, and 11% saying they had seen this in any Scottish newspaper (either printed or online).

Figure 6: Top ten ways of accessing news about the 7 May elections in Scotland



Source: Ofcom Local Election Survey. Question Q3A. Thinking about the weeks leading up to the Scottish parliament elections, through which of the following sources, if any, did you see news and information about the election? Base: all aware of the 7 May election in Scotland (1007).

TV and video

Market developments

Success and economic impact of *The Traitors*

In October 2025, the BBC published [an economic impact report on *The Traitors*](#) being filmed in Scotland. The programme has been one of the BBC's highest-performing shows since launching, with *The Celebrity Traitors* providing the most-viewed programme from public service broadcasters among viewers in Scotland in 2025.

Since 2022, the show has been filmed at Ardross Castle in the Highlands. The report, which includes contributions from Screen Scotland and VisitScotland, indicates that *The Traitors*, including the Celebrity edition and NBCUniversal's US version, contributed an estimated £21.8m in gross value added (GVA) to Scotland's economy between 2022 and 2025, with production supporting over 750 jobs. It also notes that for every £1 of GVA directly generated by production, £6.84 was put into Scotland's economy. The knock-on effects of this growth are also evident in local tourism, with Expedia reporting a 190% increase in searches for trips to the Highlands in the two weeks following the release of series two.

Licensing changes for STV

In October 2025, STV made a proposal to share all of its news programming across its two licence areas – STV North and STV Central – and remove the requirement to broadcast sub-regional opts.⁴ Ofcom consulted on a revised proposal in December 2025, which proposed that at least 30% of the flagship *STV News at Six* remained bespoke in each region, to ensure that regional distinctiveness would be maintained when audiences are highest for STV News on television.

Ofcom published its [decision to approve the changes](#) in June, with STV introducing changes to its news programming throughout July 2026. The context for the decision was the changing ways in which audiences are now getting their news alongside the significant financial headwinds STV and other public service broadcasters are facing.

Critical to the successful delivery of this new setup will be STV's maintenance of journalistic talent across both of its licensed areas, and its provision of news that is of genuine relevance to audiences in both the North of Scotland and Central Scotland. Underpinning these changes will be increased transparency from STV through its annual Statement of Programme Policy on how it will continue to serve audiences across Scotland with locally relevant news provision.

Scotland's screen sector

[A report commissioned and published by Screen Scotland](#) in October 2025 presented findings on the economic impact of the screen sector in Scotland in 2023. This is the third biennial report on the sector's economic value, produced by consultancies Saffery and Nordicity, following previous studies on the economic impact in 2019 and 2021.

⁴ Sub-regional opts refer to news segments providing content tailored to specific areas within each licence area.

The report highlights continued growth across Scotland's screen sector. Employment increased by 12.1%, from 10,940 full-time equivalents (FTEs) in 2021 to 12,260 FTEs in 2023. GVA also rose by 15%, from £627.1m in 2021 to £718.0m in 2023.

The report reiterates that Public Service Broadcasters (PSBs) continue to play a key role in Scotland's television production ecosystem, with BBC Scotland, STV, BBC/MG ALBA and Channel 4 having pre-existing and established bases in Scotland. The report estimates that in 2023, after excluding non-content costs, (e.g. marketing, advertising and tax-supported content), £222.4m was spent specifically on content production across genres including news, current affairs, sport, children's programming, arts and entertainment.

Comparatively, inward investment in film and HETV production, which more than doubled between 2019 and 2021 to £347.4m and overtook PSBs as the largest category of production, fell to £173.5m in 2023. As a result, PSBs regained their position as the largest category of TV and film production spend in Scotland in 2023.

Gaelic-language coverage of the Commonwealth Games

In July 2026, [the BBC announced that BBC ALBA](#) – the channel operating in partnership between the BBC and MG ALBA – would provide live coverage of the Commonwealth Games in Glasgow which runs from 23 July to 2 August. The deal is to provide nightly live coverage and highlights of the event broadcast throughout the Games alongside the live English-language coverage provided by TNT Sports across the UK. This will ensure there is live free-to-air coverage of the Games for audiences in Scotland, with BBC ALBA's coverage also available across the UK on BBC iPlayer.

Viewing trends

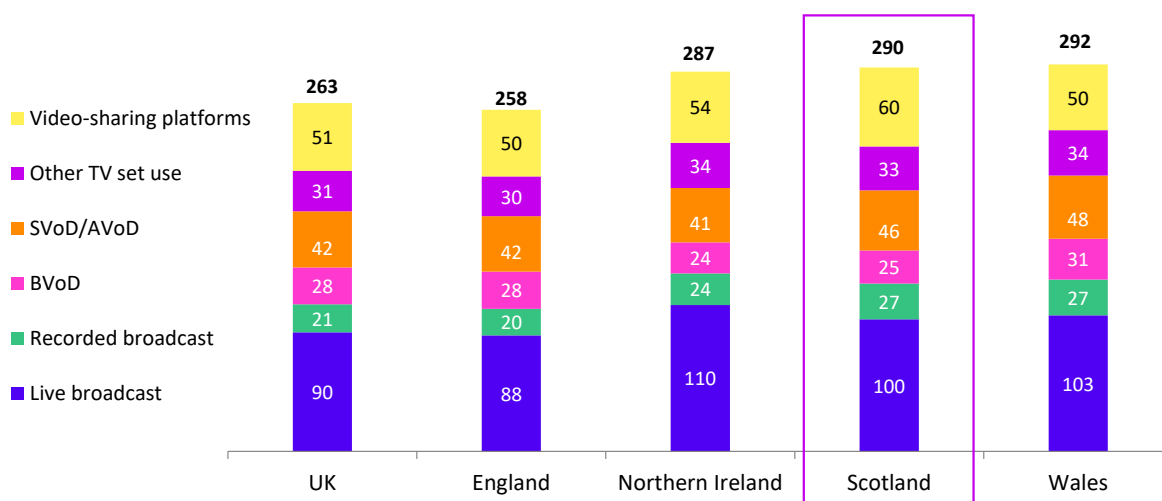
People in Scotland watched an hour of content on VSPs each day in 2025

In Scotland, people watched an average 4 hours 50 minutes of video content at home per day in 2025, once again the second highest of the UK nations after Wales, despite declining 14 minutes since 2024.

Audiences in Scotland watched the least broadcaster TV content – including live TV, recorded TV and broadcaster video-on-demand (BVoD) – out of the devolved nations, accounting for 52% of viewing (2 hours 31 minutes per day), an 18-minute decline year-on-year (11%). This decline was driven by a fall in live TV viewing, down by 17 minutes to 1 hour 40 minutes. Viewing of recorded TV fell by 1 minute to 27 minutes, while BVoD remained stable at 25 minutes. This marked the steepest drop among all nations, with an 8% (12 minute) decline across the UK as a whole.

Average viewing of video-sharing platforms (VSPs) increased by 2 minutes to 1 hour per day in 2025, more than any other nation. People in Scotland watched the second-largest amount of subscription video-on-demand (SVoD) services, e.g. Netflix, and advertising-supported video-on-demand (AVoD) services, e.g. Pluto TV, averaging 46 minutes a day, up 2 minutes year-on-year.

Figure 7: Total in-home daily video viewing minutes per person, by platform and nation: 2025

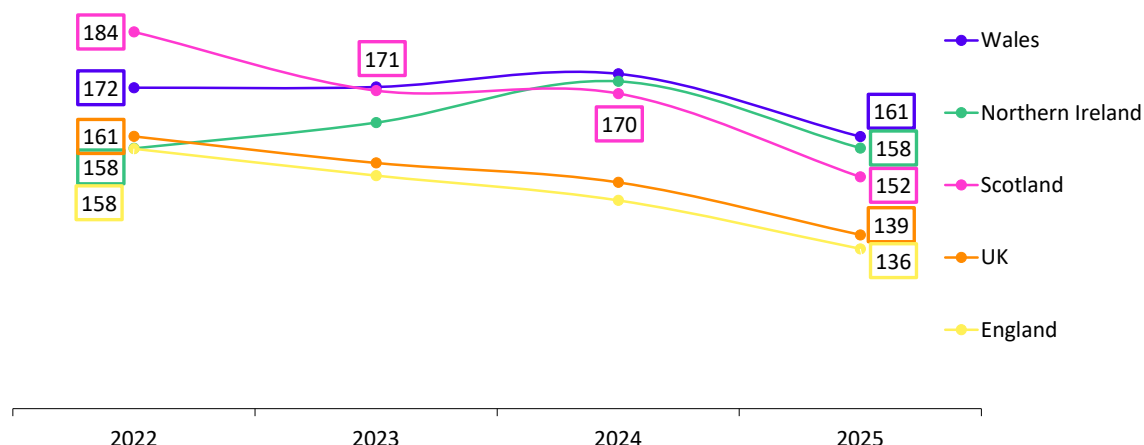


Source: Barb as-viewed on TV sets and other devices using the home's WiFi network. 'Broadcaster content' includes live TV, recorded playback and BVoD. 'Other TV set use' includes viewing to some SVoD/AVoD/VSP that cannot be definitively measured, as well as some unmeasured broadcast channels, some EPG/menu browsing, viewing when the audio is muted, piracy, unmeasured box-sets/pay-per-view content, and non-video internet activity through a PC or other device connected to the TV. 'SVoD/AVoD' 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).

Broadcaster TV viewing in Scotland declined by a greater extent than the UK average

Declines in average daily viewing to broadcaster TV – including linear, recorded and on broadcaster video-on-demand (BVoD) services - among all individuals aged 4+ were observed across the UK, with the UK average falling by 12 minutes in 2025 compared with 2024, representing an 8% decrease. Scotland experienced a more significant decline in 2025 compared to 2024, with its 18-minute fall in broadcaster TV viewing the largest drop of any UK nation. Looking further back, Scotland was the highest-viewing nation in 2022, averaging 3 hours 4 minutes of viewing per day. However, it now records lower viewing levels than both Wales and Northern Ireland. Between 2022 and 2025, average daily viewing to broadcaster TV in Scotland declined by 32 minutes, equivalent to an 18% decrease.

Figure 8: Average daily minutes viewed of broadcaster TV per person, by nation: 2022-2025



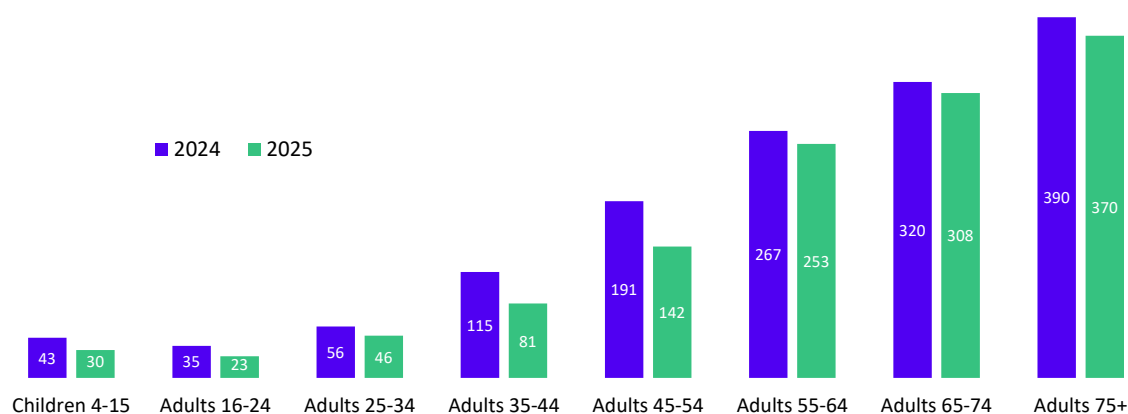
Source: Barb as-viewed. All individuals 4+, BBC areas. Live + recorded playback and BVoD.

BVoD viewing increased by 87% in older adults (75+)

All age groups in Scotland spent less time watching broadcaster TV in 2025, although the steepest drop was among younger adults (16–24), with viewing down 32% year-on-year to just 23 minutes per person per day. In contrast, adults aged 65-74 experienced the smallest decline, at 4%, with average viewing still high at 5 hours 8 minutes per day. The largest absolute decrease was among those aged 45-54, whose viewing fell by 49 minutes (-26%) to 2 hours 22 minutes per day.

Most of the overall decline was driven by reductions in viewing of linear TV (live and recorded), which fell by 13% across all individuals in 2025 compared with 2024. Meanwhile, BVoD viewing increased slightly, up 1% year-on-year. Among those aged 75+, linear TV declined by 9%, but this was partially offset by an 87% increase in BVoD viewing, rising to 28 minutes per person per day – the largest increase across all age groups.

Figure 9: Average daily minutes of broadcaster TV viewed in Scotland, by age group: 2024 vs. 2025



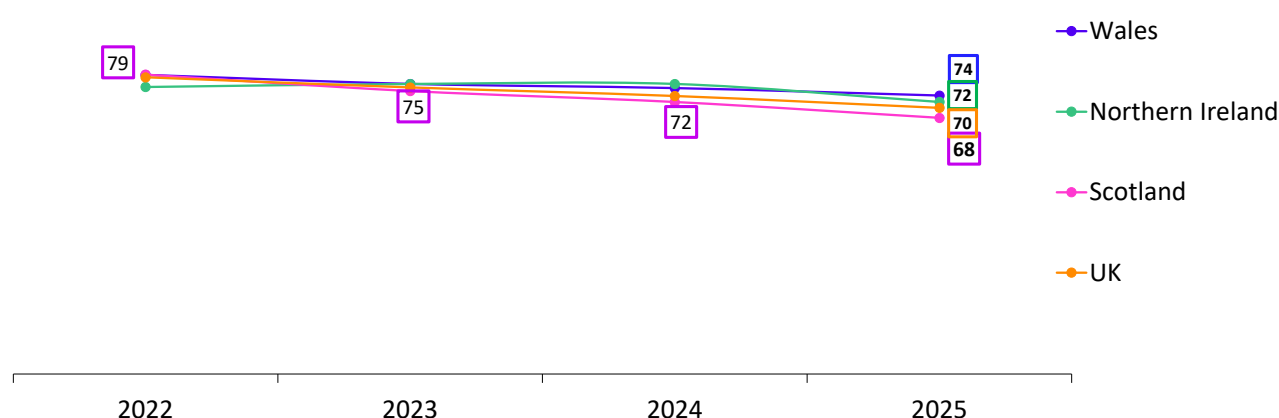
Source: Barb as-viewed. Live + Recorded Playback and BVoD.

Reach of broadcast TV in Scotland declined in 2025, and remains the lowest of all nations

The average weekly reach⁵ of broadcaster TV in Scotland declined by four percentage points in 2025 compared with 2024, falling to 68%. This represents one of the steepest declines across the nations, just behind Northern Ireland, and is higher than the UK average decline of three percentage points. Audiences in Scotland have consistently recorded the lowest reach among the devolved nations since 2023, and the level is now below the UK average of 70%.

Scotland was the only nation not to see an increase in BVoD reach, which remained stable at 42% in 2025 compared with 2024. In contrast, the reach of linear TV declined by six percentage points year-on-year, falling to 55% in 2025.

Figure 10: Average weekly reach % of broadcaster TV, by nation: 2022-2025



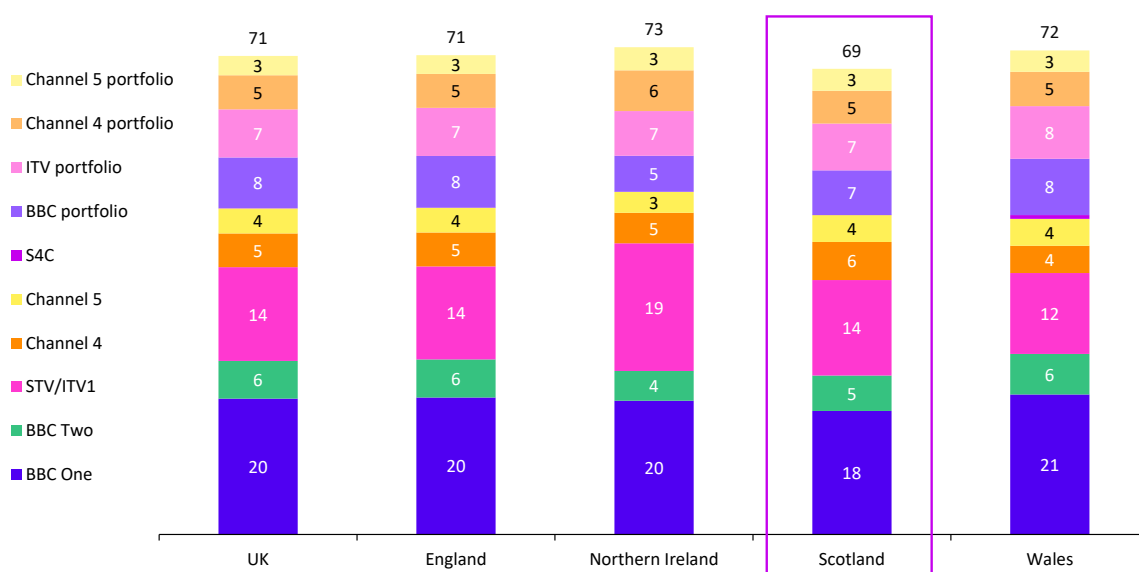
Source: *Barb as-viewed*. All individuals 4+, BBC areas, live + recorded playback and BVoD. Reach criteria 15+ consecutive minutes. Note: England figures not shown on the chart – they match the data for the UK as a whole.

Scotland again had the lowest PSB share of broadcast viewing among the UK nations

In 2025, the PSBs and their portfolio channels, including BVoD services, accounted for 69% of all broadcast TV viewing in Scotland, the lowest proportion among the UK nations. The BBC remained the largest PSB broadcaster, attracting a 30% share of the broadcast audience. However, this was below the UK average of 34% and lower than the corresponding shares recorded in both England and Wales. STV and ITV channels accounted for 21% of broadcast viewing in Scotland, matching the UK average. Among the nations, only Northern Ireland recorded a higher share for ITV services, at 26%.

⁵ Average weekly reach is defined as the percentage of all individuals 4+ watching 15 consecutive minutes or more in an average week.

Figure 11: Share (%) of broadcaster TV viewing for the PSBs' channels, by nation: 2025



Source: Barb as-viewed (all individuals 4+). Main channels include +1 channels where relevant. Portfolio groups include all other channels besides the main channel. Includes BVoD services.

SVoD adoption holds steady in Scotland

In Scotland, 71% of households subscribed to at least one SVoD service in Q1 2026, unchanged since the previous year.⁶

Subscription levels across the major platforms were broadly stable year-on-year. Netflix remained the leading SVoD service, available in 63% of households in Scotland, the same proportion as in Q1 2025. Amazon Prime Video remained the second most subscribed service, with household penetration increasing slightly from 47% to 48%, while Disney+ remained steady at 24%.

Among the smaller providers, Discovery+ and Apple TV+ recorded growth, rising from 9% to 12%, and 7% to 9% of households respectively. In contrast, Paramount+ saw a slight decline in penetration, falling from 12% to 11% over the same period.

The BBC accounts for the largest share of in-home video viewing among the broadcasters

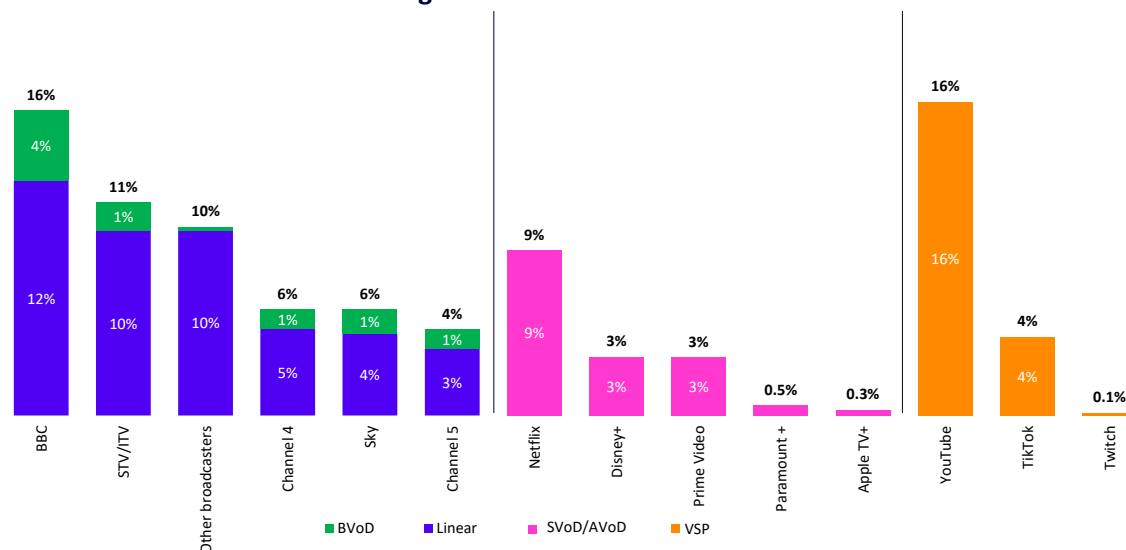
In 2025, BBC accounted for 16% of all in-home video viewing across all devices. Most of this viewing came from linear television (12%), down two percentage points year-on-year, with a further 4% generated by BVoD viewing, up one percentage point.

STV/ITV accounted for 11% of total viewing, down one percentage point since 2024, due to BVoD declining one percentage point to 1%. Channel 4, Sky and Channel 5 all remained stable year-on-year.

Netflix accounted for 9% of total in-home video viewing in 2025, up two percentage points year-on-year, while Disney+ and Amazon Prime Video remained level. YouTube increased two percentage points, accounting for a 16% share, while TikTok remained flat at 4%.

⁶ Barb Establishment Survey Q1 2025 & Q1 2026, includes households receiving free and paid subscriptions.

Figure 12: Share of total video viewing for individual services in Scotland: 2025



Source: Barb as-viewed on TV sets and other devices using the home's WiFi networks, all individuals 4+. 'Linear' includes broadcast content watched live or via recorded playback. Broadcaster services include all portfolio channels.

People in Scotland spent the most time on YouTube in the UK

Individuals in Scotland spent 47 minutes per day on average viewing YouTube across all devices in the home in 2025, the highest of all four nations. The average time spent viewing YouTube in Scotland on a TV set increased by 15%, from 20 minutes in 2024 to 23 minutes per day in 2025. Across the whole of 2025, among all individuals, 49% of in-home YouTube viewing in Scotland was via a TV set, up from 45% in 2024.⁷

Figure 13: Average daily minutes viewed of YouTube per person, by nation: 2025



Source: Barb as-viewed on TV sets and other devices using the home's WiFi network. All individuals 4+.

In 2025, 62% of individuals 4+ in Scotland watched at least three minutes of YouTube per week in the home, across all devices. This figure increased to 67% among adults aged 16-34.

⁷ Barb as-viewed.

Figure 14: Average weekly reach (%) of YouTube, by nation: 2025



Source: Barb as-viewed, all devices using the home's WiFi network. Reach criteria: 3+ consecutive minutes.

According to Ofcom's VoD Survey, YouTube Shorts and videos up to 15 minutes long were the most popular forms of content viewed on YouTube in Scotland, with 53% of adults and teens aged 13+ in Scotland reporting watching these forms of content in the past three months. However, 50% claimed to have watched videos longer than 15 minutes, in line with trends across the other nations, indicating that although short-form content continues to be popular, longer videos still appeal to many viewers.⁸

Most-watched genres, programmes and films in Scotland

Between 2024 and 2025 the children's genre recorded the steepest decline in viewing among individuals aged 4+ in Scotland, with total broadcaster TV viewing falling by 29% year-on-year to an average of 10 hours 48 minutes per person across 2025. This was driven by a 40% decline in live and recorded viewing, while BVoD viewing fell by 11%.

In contrast, the religion & ethics genre had the largest overall increase, with viewing rising 15% to an average of 3 hours 44 minutes in 2025. Growth was driven by a 15% increase in live and recorded viewing and a substantial 72% rise in BVoD viewing – the highest BVoD growth of any genre. However, BVoD viewing still accounted for just over 3 minutes of total viewing.

The next largest increase in BVoD viewing was for national/international news, which grew by 62% year-on-year. Despite this, total broadcaster TV viewing for the genre declined by 6% to an average of 79 hours 21 minutes in 2025. Music also performed strongly on BVoD, with viewing increasing by 53% to an average of 49 minutes in 2025, contributing to an overall 9% increase in viewing of music on broadcaster TV.

In 2025, Netflix's animated family film *KPop Demon Hunters* was the most-watched title in Scotland, averaging 2.2 million viewers on TV sets. The top ten titles were split evenly between Netflix and BBC, though only one BBC title made the top five: *The Celebrity Traitors* averaged 1.3 million viewers, nearly 500,000 more viewers than its original counterpart *The Traitors* (936,000 viewers).

British drama featured prominently on the list, including on Netflix, with the first episodes of psychological crime drama *Adolescence* (1.3 million) and Edinburgh based crime thriller *Dept.Q* (1.1

⁸ Ofcom VoD Survey 2026.

million) ranking as the third and fourth most-viewed programmes of the year. Further down the list was long-running Scottish crime drama *Shetland* (851,000 viewers) and *Death in Paradise* (805,000 viewers).

The World Cup Qualifier: Scotland vs Denmark match was the only sporting event to make the top ten, watched by 856,000 viewers.

Figure 15: Top ten most-watched programmes/films in Scotland (highest-performing episode per title): 2025

Rank	Title	Genre	Broadcaster/ Service	Episode	Audience (000s)
1	KPop Demon Hunters	Films	Netflix	Film (2025)	2,173
2	The Celebrity Traitors	Entertainment	BBC	Series 1, Episode 6	1,327
3	Adolescence	Drama	Netflix	Series 1, Episode 1	1,317
4	Dept. Q	Drama	Netflix	Series 1, Episode 1	1,116
5	The Thursday Murder Club	Films	Netflix	Film (2025)	1,101
6	Ms. Rachel	Children	Netflix	Series 1, Episode 2	1,027
7	The Traitors	Entertainment	BBC	Series 3, Episode 1	936
8	Sportscene: International Football	Sport	BBC	World Cup Qualifier: Scotland v Denmark	856
9	Shetland	Drama	BBC	Series 10, Episode 1	851
10	Death in Paradise	Drama	BBC	Series 14, Episode 1	805

Source: Barb as-viewed, all individuals aged 4+. TV sets only. Highest-performing episode per title based on total cumulative viewing across the whole year. The broadcaster figures include live viewing, recorded playback and BVOD. Only TV set analysis has been used because SVOD/AVOD programme figures are only available for TV sets.

The FIFA World Cup 2026 demonstrates how live viewing remains central to sports consumption. Scotland's group stage loss to Morocco averaged 1.1 million viewers with a peak 1.3 million viewers across STV and STV Player⁹, giving the broadcaster its highest peak audience since June 2024 (Scotland v Germany, Euro 2024) and a 75% share of TV viewing¹⁰. Meanwhile [the BBC reported](#) a peak audience across the UK of 2.8 million viewers on BBC One and BBC iPlayer for Scotland's opening match v Haiti despite kicking off at 2am, attracting a 92% audience share in Scotland.

Around a quarter of adults in Scotland are most likely to say they would turn to the BBC first when thinking about what to watch

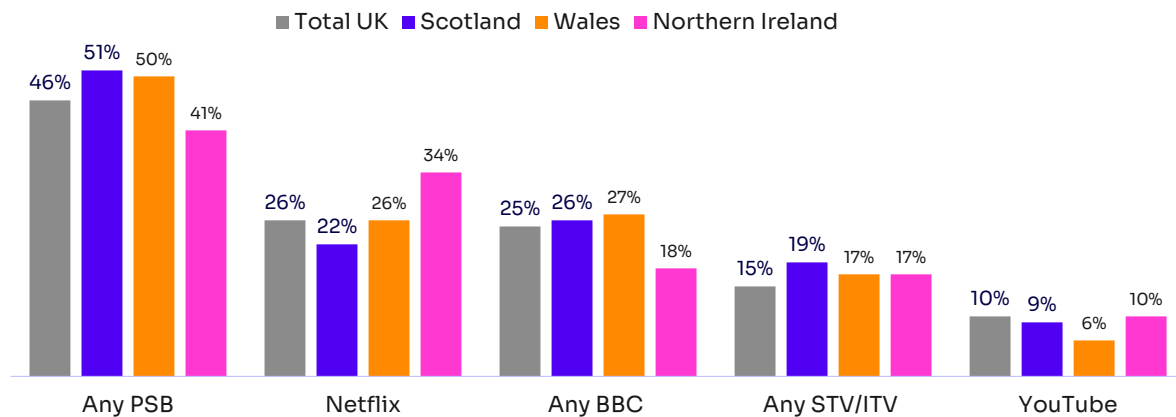
We asked respondents where they usually turned to first when they were thinking about what they wanted to watch. Half of online adults in Scotland said they usually turn to a public service

⁹ Barb as-broadcast. Live+VOSDAL (viewed on same day as live). STV and STV Player on TV sets only.

¹⁰ STV.

broadcaster first, with 26% saying any BBC service. Around one in five said they would turn to Netflix first (22%) or STV/ITV (19%).

Figure 16: Where audiences turn to first when thinking about what to watch



Source: Ofcom Adults' PSM Tracker 2025/6. Supplementary Survey. QA11. When thinking about what to watch, which one of these TV and video services do you usually turn to first? Base: All respondents (3050), Scotland (281), Wales (253), Northern Ireland (260).

Audience attitudes towards PSBs and BVoDs

Around seven in ten PSB viewers in Scotland say they are satisfied with them

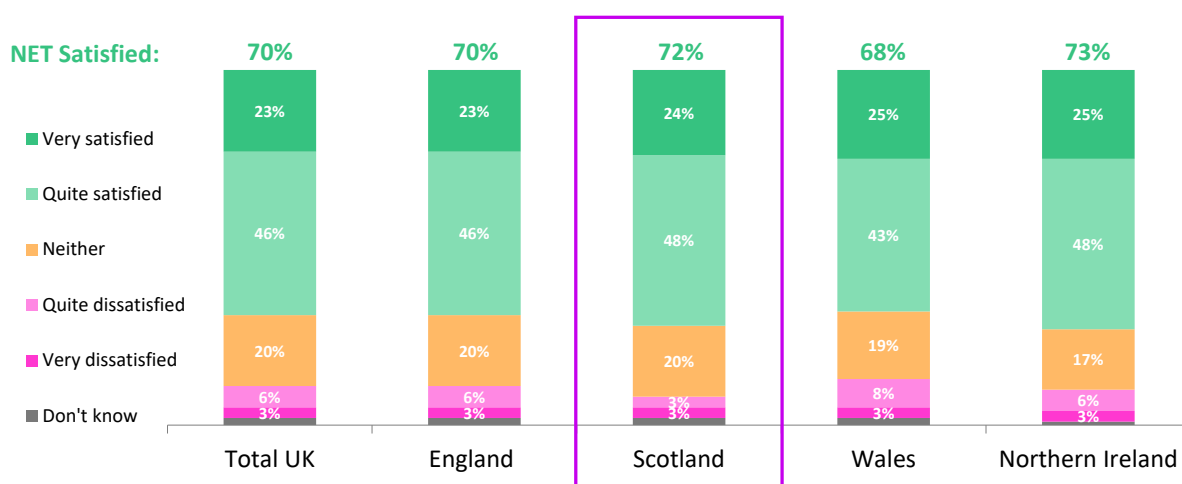
According to Ofcom's Adult's PSM Tracker 2025/26,¹¹ around seven in ten (72%) of PSB viewers¹² in Scotland said they were satisfied with PSBs overall, with 6% saying they were dissatisfied. This is roughly in line with last year's findings.¹³ All nations are in line with the UK average.

¹¹ In 2025, following a review of the PSM Tracker and the BBC Performance Tracker, Ofcom combined them into one survey – the new Adults' PSM Tracker. As a result of this merger, changes were made to the methodology and questionnaire. For further information, please see the [Technical Report](#) for the new tracker.

¹² Ofcom's Adults' PSM Tracker 2025/26 defines PSB viewers as all who have watched a PSB channel/service in the past six months.

¹³ Trends are indicative due to changes in methodology.

Figure 17: Adults' satisfaction with PSBs overall, UK total and by nation: 2025/26

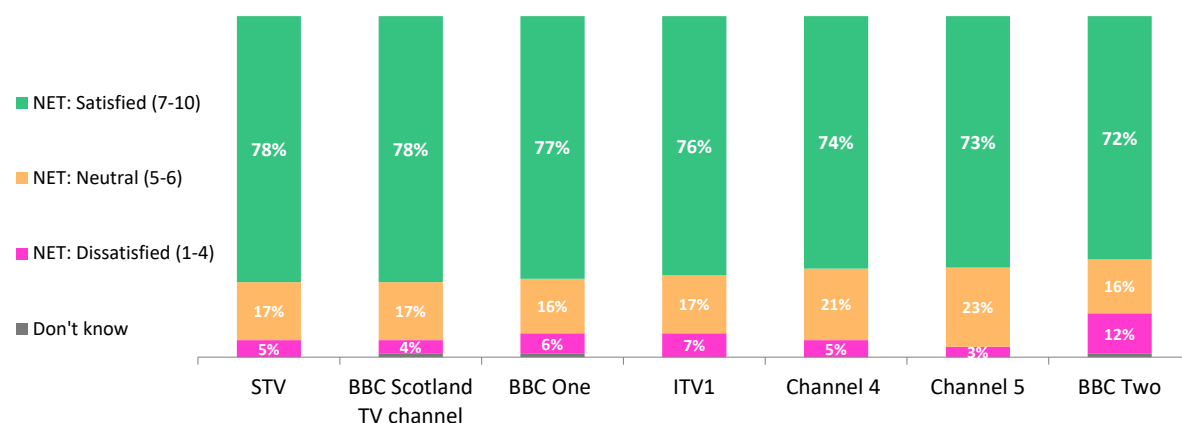


Ofcom Adults' PSM Tracker 2025/26. Main Survey. QC15. And now, if you think about ALL the public service broadcasters combined - in other words, the BBC, ITV (ENGLAND) STV/ ITV (SCOTLAND) ITV Cymru Wales/ ITV (WALES) UTV/ ITV (NORTHERN IRELAND), Channel 4, Channel 5, and S4C... How satisfied are you that combined they provide the different areas asked about in the previous questions? Base: Those who have watched any PSB channels or on-demand services in the last 6 months, Total UK (4684), England (3530), Scotland (450), Wales (385) and Northern Ireland (319).

When asked to consider PSB channels individually, around three quarters of viewers in Scotland said they were satisfied with STV (78%), BBC Scotland TV channel (78%), ITV1 (76%), BBC One (77%), Channel 4 (74%), Channel 5 (73%) and BBC Two (72%).¹⁴

Looking at BVoD services, a large majority of viewers in Scotland said they were satisfied with BBC iPlayer (85%) and STV Player or STV Player VIP (84%). Around three-quarters said they were satisfied with 5 streaming (78%), Channel 4 or Channel 4+ streaming (77%) or ITVX or ITVX Premium (75%).

Figure 18: Adults' satisfaction with individual PSBs: 2025/26



Ofcom Adults' PSM Tracker 2025/26. Main Survey. Question QB1. On a scale of 1 to 10, where 1 means extremely dissatisfied and 10 means extremely satisfied, overall how satisfied or dissatisfied are you with these TV channels? Base: Those who have watched [broadcaster] in the last 6 months: STV (320), BBC Scotland TV channel (143), BBC One (342), ITV1 (225), Channel 4 (268), Channel 5 (213) and BBC Two (178).

¹⁴ The base size for viewers of BBC Alba in Scotland is too low to report on.

Ofcom's Children's Public Service Media Tracker 2025/26 asked children aged 8-16 and the parents/guardians of younger children (aged 3-7) answering on the child's behalf,¹⁵ whether they 'like' different TV channels. Among children in Scotland who are viewers of PSB TV channels, over half say they 'like' BBC TV channels (57%) while around half say they like ITV TV channels (including STV TV channels) (50%) and Channel 5 TV channels (47%). Just over two-fifths (43%) say they like Channel 4 TV channels.

When looking at individual BVoD services just under two-thirds (63%) of children in Scotland say that they like BBC iPlayer. Around half say they like ITVX (52%), Channel 4 streaming (48%) and STV Player (47%). Just under two-fifths (37%) of children say they like 5 streaming.

Trusted and accurate UK news remains one of the most important elements of PSB in Scotland

In 2025/26 the Adults' PSM Tracker asked all adults to consider what were the top three most important features for PSBs to delivery to society overall. Half of all adults in Scotland (50%) ranked *'trusted and accurate news'* in their top three, followed by *'high quality and creative programmes and content'* (45%) and *'a wide range of different types of programmes and content'* (40%). These findings are broadly similar to the findings of the previous iteration of the PSM Tracker in 2023, when *'trusted and accurate UK news'* was also seen as the most important attribute of PSBs in Scotland.¹⁶

PSBs are perceived to deliver well on programmes made for UK audiences, and a wide range of different types of programmes

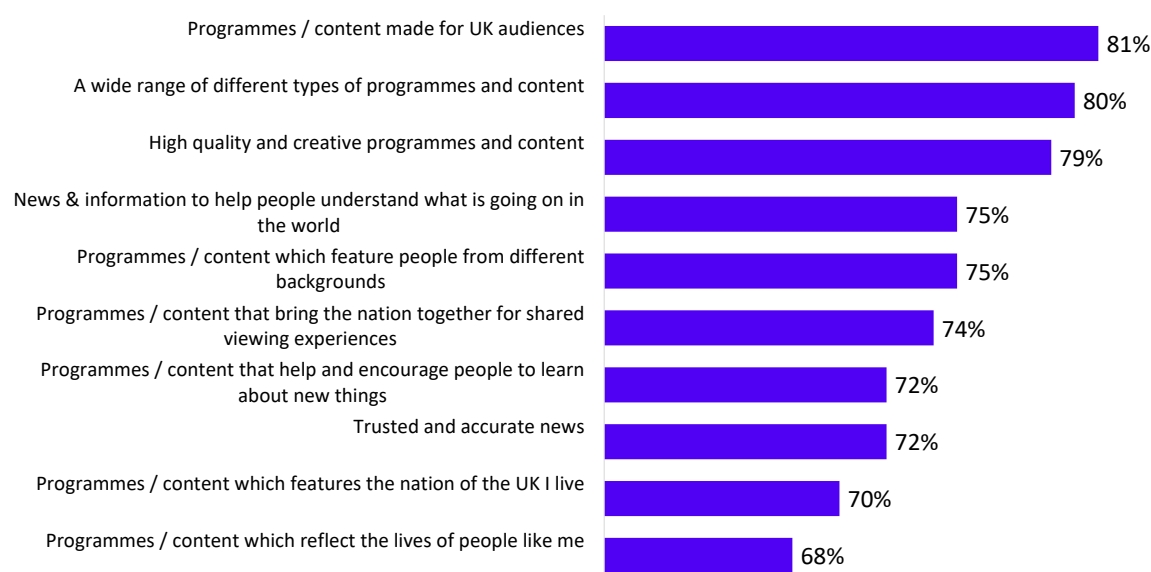
In terms of performance, PSBs overall are seen to deliver *'programmes and content made for UK audiences'* (81%), *'a wide range of different types of programmes and content'* (80%) and *'high quality and creative programmes and content'* (79%) well by PSB viewers in Scotland.¹⁷ When looking at PSB programming relating to representation and the local area, seven in ten (70%) viewers in Scotland said that PSBs delivered *'programmes and content which features the nation of the UK I live in'*.

¹⁵ The sample for Ofcom's Children's PSM Tracker is children aged 3-16. For children aged 3-7 their parents/guardians answer the questions on their behalf while children aged 8-16 answer the questions themselves. Where we discuss the responses of children aged 3-16 throughout this report, we are referring to the answers of both the older children themselves (8+) and the parents/guardians of younger children (3-7).

¹⁶ Trends are indicative due to changes in methodology.

¹⁷ The Ofcom Adults' PSM Tracker uses questions asking respondents to say how 'well' or 'badly' different attributes are being provided, using a 1-10 scale where 1 means extremely badly and 10 means extremely well. When referring to 'well' throughout this report, it is a NET of scores 7 to 10.

Figure 19: Delivery of PSB features among adult PSB viewers: 2025/26



Ofcom Adults' PSM Tracker. Main Survey. QC13. Thinking about public service broadcasters combined - so the BBC, ITV (ENGLAND) STV/ ITV (SCOTLAND) ITV Cymru Wales/ ITV (WALES) UTV/ ITV (NORTHERN IRELAND), Channel 4, Channel 5, and S4C... How well or badly do the public service broadcasters combined provide... Base: Those who have watched any PSB channels or on-demand services in the last 6 months in Scotland (450). Net rating 7-10.

When looking at the delivery of features by individual PSBs, combining their TV channels and streaming services,¹⁸ around eight in ten viewers in Scotland rated BBC TV and STV/ITV highly for 'programmes and content made for UK audiences' and 'high quality and creative programmes and content'.

¹⁸ When asking respondents to rate PSBs for each statement, we ask them to think about their TV channels and BVoD service combined (e.g. BBC TV channel *and* BBC iPlayer). In previous iterations of the PSM Tracker, respondents rated PSB TV channels separately to their BVoD service, so each PSB effectively had two different ratings for each attribute. The change in format of this question, alongside the methodology changes, means time series is not available, even indicatively.

Figure 20: Perceptions of PSBs (TV channels and BVoD) among adults in Scotland: 2025/26

	BBC TV	STV/ITV	CHANNEL 4	CHANNEL 5
Programmes and content made for UK audiences	79%	80%	76%	69%
High quality and creative programmes and content	77%	77%	74%	67%
A wide range of different types of programmes and content	76%	76%	73%	72%
Programmes and content which feature people from different backgrounds	73%	75%	74%	66%
News and information to help people understand what is going on in the world	72%	72%	68%	63%
Programmes and content that bring the nation together for a shared viewing experience	70%	72%	66%	61%
Programmes and content that help and encourage people to learn about new things	69%	68%	66%	54%
Trusted and accurate news	65%	71%	67%	56%
Programmes and content which features the nation of the UK I live in	65%	77%	62%	59%
Programmes and content which reflects the lives of people like me	61%	73%	64%	60%

Source: Ofcom Adults' PSM Tracker 2025/26. Main Survey. Question NC1-6. Thinking of [broadcaster] overall... How well or badly does [broadcaster] provide... Base: Those in Scotland who have watched ... in last six months: BBC TV (400), ITV/STV (400), Channel 4 (300) and Channel 5 (245). Net rating 7-10.

According to our Children's PSM Tracker, children in Scotland who watch PSBs agreed that overall, they are delivering across different features. This includes just over seven in ten saying that PSBs provide 'programmes for children their age' (73%) and 'high quality programmes they enjoy' (71%).

However, there are differences when looking at the PSBs individually. The BBC is rated highest across all aspects of delivery; most notably three-quarters (75%) of children say that the BBC provides 'programmes and content that helps them learn' and over seven in ten (73%) said that it provides 'programmes for children their age'.

Figure 21: Perceptions of PSBs (TV channels and BVoD) among children in Scotland: 2025/26

	BBC	STV/ITV	CHANNEL 4	CHANNEL 5
Programmes and content that helps them/ me learn	75%	53%	50%	48%
Programmes for children their/ my age	73%	56%	51%	52%
High quality programmes they/ I enjoy	68%	55%	54%	51%
A wide range of programmes they/ I enjoy	68%	53%	48%	53%
News and information that helps them/ me to understand what is going on in the UK and the world	64%	51%	45%	45%
Programmes that show children that live in the same part of the country as them/ me	62%	51%	46%	48%

Source: Ofcom Children's PSM Tracker 2025/26. Question C8a-d. Now thinking just about [PSB NAME], how much do you agree or disagree it provides the following things for your child/ for you? Base: Users of each service in Scotland. BBC (754), ITV/ STV (702), Channel 4 (630), Channel 5 (630).

Satisfaction with SVoD and VSPs

Viewers in Scotland are highly satisfied with SVoD services and VSPs

Ofcom's Adults' PSM Tracker shows that levels of satisfaction with SVoD services are high. A large majority of viewers in Scotland were satisfied with Netflix (92%) and Disney+ (92%). Slightly less than nine in ten (87%) said they were satisfied with NOW, and 82% said the same for Amazon Prime Video.

Similarly, the Children's PSM Tracker showed that just over nine in ten children in Scotland (aged 3-16) who watch each service said they 'like' Netflix (92%) and Disney+ (91%). This is followed by around four in five (79%) who said they like Amazon Prime Video. Just under seven in ten said they like Paramount+ (68%) and Sky On Demand or Sky Go or Sky Kids (68%). Around six in ten said they like Apple TV+ (62%) and NOW (59%).

The Adults' PSM Tracker also asks adults to choose the broadcasters or streaming services they think best provide different types of content. In Scotland, the BBC tends to be selected most for best providing different types of content, similar to other nations and the UK overall. For example, around three quarters (73%) of adults in Scotland selected the BBC for best providing 'news', followed by STV/ITV (55%) and Channel 4 (41%). Around two thirds selected the BBC for best providing 'Current Affairs programmes' (66%) and 'British drama' (65%). PSBs perform well in this question for most of the genres we ask about, although Netflix, Amazon Prime Video and Disney+ are seen to best provide 'USA comedy' and 'USA drama' content for viewers in Scotland and the wider UK.

Figure 22: Proportion of online adults in Scotland associating a particular service with each genre

Genre	BBC	STV / ITV	Channel 4	Netflix	Channel 5	YouTube	Amazon Prime Video	NOW	Disney+
News	73%	55%	41%	5%	26%	8%	3%	3%	3%
British drama	65%	50%	38%	24%	30%	10%	13%	8%	6%
Current affairs programmes	66%	39%	35%	9%	23%	8%	4%	5%	3%
Documentaries	58%	33%	47%	35%	30%	18%	16%	9%	10%
British comedy	57%	33%	34%	21%	20%	14%	14%	7%	6%
Live sport	56%	42%	18%	9%	10%	9%	23%	9%	4%
Science & nature	53%	22%	28%	15%	19%	15%	10%	5%	9%
Children's programmes	49%	27%	15%	28%	17%	19%	16%	6%	41%
Quizzes/ game shows	49%	57%	31%	9%	20%	10%	4%	7%	7%
Arts & music	44%	19%	28%	15%	15%	32%	10%	8%	10%
Religion	29%	13%	11%	7%	9%	7%	3%	5%	3%
USA drama	16%	10%	21%	44%	25%	15%	32%	10%	25%
USA comedy	15%	10%	22%	41%	22%	13%	26%	8%	24%

Source: Ofcom Adults' PSM Tracker 2025/26. Supplementary Survey. Question C1A. For each description, please select the logos of the broadcasters and services that you think each description applies to. Base size: All respondents in Scotland (281).

First place

Second place

Third place

In addition, we showed adults a range of features that PSBs are typically associated with and asked them to select which broadcasters and services they thought each description applied to. Respondents were able to choose as many broadcasters and services as they liked for each description. Overall, the BBC featured in the top three across all descriptions. The BBC is ranked first in Scotland for 'offer[ing] a range of points of view' (48%)¹⁹ and 'offer[ing] a different point of view from my own' (34%).²⁰ Netflix also does well, being associated with a majority of descriptions including 'offer[ing] a wide range of different types of content' (60%)²¹, 'high quality' (58%)²² and 'offer[ing] creative content' (46%).²³

¹⁹ Followed by STV/ITV (38%) and Channel 4 (35%).

²⁰ Followed by Channel 4 (31%), and YouTube (22%), Netflix (22%) and STV/ITV (22%).

²¹ Followed by BBC (49%), and YouTube (43%) and STV/ITV (43%).

²² Followed by BBC (53%) and STV/ITV (40%).

²³ Followed by BBC (42%) and YouTube (41%).

Figure 23: Proportion of online adults in Scotland associating a particular service with the content descriptions

Statement	BBC	STV/ITV	Channel 4	Channel 5	Netflix	YouTube	Amazon Prime Video	NOW	Disney+
High quality	53%	40%	36%	25%	58%	28%	33%	16%	32%
Offers creative content	42%	34%	38%	26%	46%	41%	26%	10%	25%
Innovative (introduces new ideas, programmes or formats)	33%	26%	32%	28%	45%	33%	25%	10%	17%
Offers a different point of view from my own	34%	22%	31%	21%	22%	22%	9%	6%	11%
Offers a range of points of view	48%	38%	35%	25%	25%	25%	15%	5%	10%
Is impartial (not favouring one side over another)	33%	26%	25%	16%	22%	18%	14%	6%	10%
Content that is relevant to me	50%	47%	38%	28%	51%	40%	31%	10%	22%
Takes risks with content	27%	17%	37%	27%	30%	22%	17%	7%	11%
Offers a wide range of different types of content	49%	43%	35%	32%	60%	43%	39%	18%	29%
Offers something unique that I can't find elsewhere	29%	21%	22%	13%	43%	30%	22%	6%	18%
Trustworthy	47%	41%	36%	25%	40%	29%	25%	9%	21%
Inspires me to try new activities, hobbies or interests	22%	17%	18%	11%	19%	32%	11%	4%	8%

Source: Ofcom Adults' PSM Tracker 2025/26. Supplementary Survey. Question C1A. For each type of programme, please select the logos of the broadcasters or services you think best provide that type of content. Please select as many or as few as you think that description applies to, or none. Base size: All respondents in Scotland (281).

First place
Second place
Third place

According to Ofcom's Adults' PSM Tracker 2025/26, the majority (85%) of viewers of YouTube in Scotland said they were satisfied with the service, in line with the UK average.²⁴ Similarly, Ofcom's Children's PSM Tracker found that 93% of children in Scotland who used YouTube (including YouTube Kids) say they liked the service.

²⁴ Viewers in the past six months.

TV and video content for and from Scotland

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.

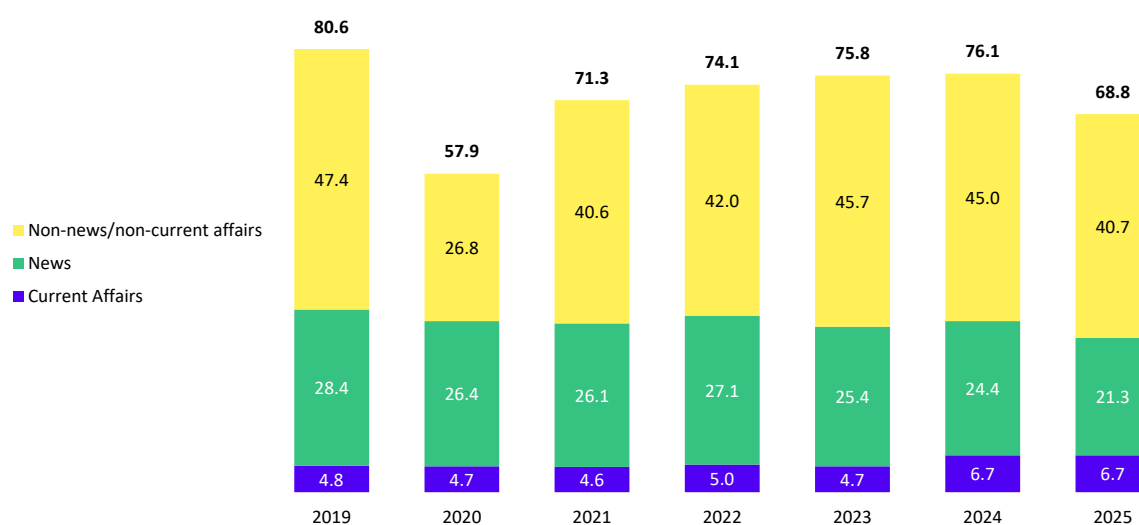
How we present financial data

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 [Communications Market Report](#), users can view financial data in either nominal or 'real' (CPI-adjusted) terms, with users easily able to switch between the two.

Overall, PSB spend on first-run content for Scotland fell in 2025

The BBC and STV/ITV provide programming specifically for viewers in Scotland across a range of genres, and spend on such content decreased by 9.7% in 2025, to £68.8m. The majority (59.2%) went towards non-news/non-current affairs programmes, a decrease of 9.6% (£4.3m) year on year. In the year after the 2024 General Election, total PSB spending on news reduced by 12.6% (-£3.1m), while current affairs spending was maintained at £6.7m, unchanged from 2024.

Figure 24: PSB spend (£m) on first-run UK-originated content for Scotland, by genre: 2019-2025

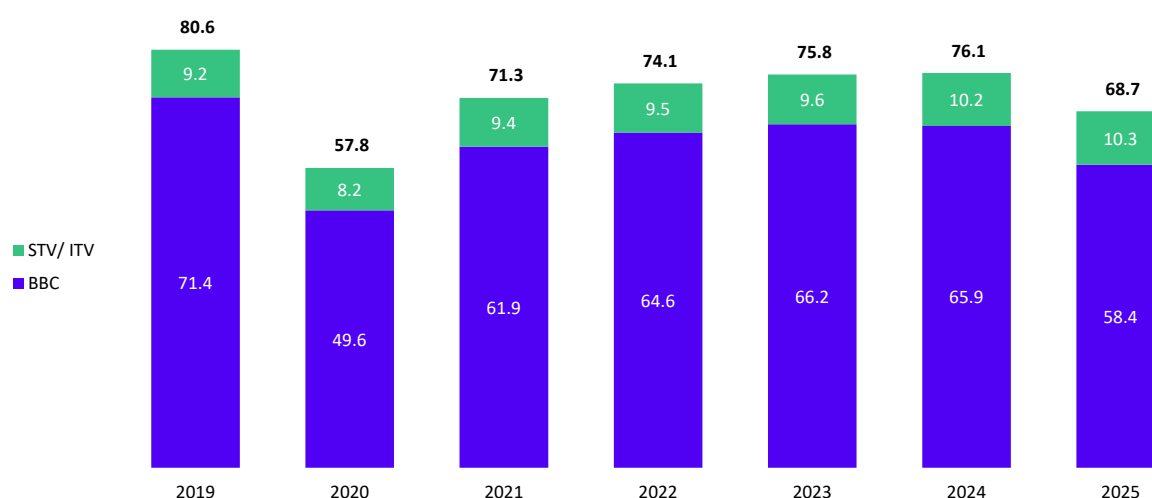


Source: Ofcom/broadcasters.

The overall decline in spend for Scotland came from the BBC

The vast majority of PSB spend on first-run programming for viewers in Scotland in 2025 was from the BBC, which decreased by £7.5m (-11.4%) to £58.4m.²⁵ Alongside 2024 being a General Election year, resulting in a lower news spend figure for 2025, other factors included a shift in BBC spending from linear services to online, reflecting changing audience behaviour, and some key 2024 titles (including *Dinosaur*, *Only Child* and *Granite Harbour*) not due to return until 2026. Meanwhile, combined spend by the Channel 3 services, STV and ITV1, increased very slightly to £10.3m (+1%).

Figure 25: BBC and STV/ITV spend (£m) on non-network first-run UK-originated content for Scotland: 2019-2025



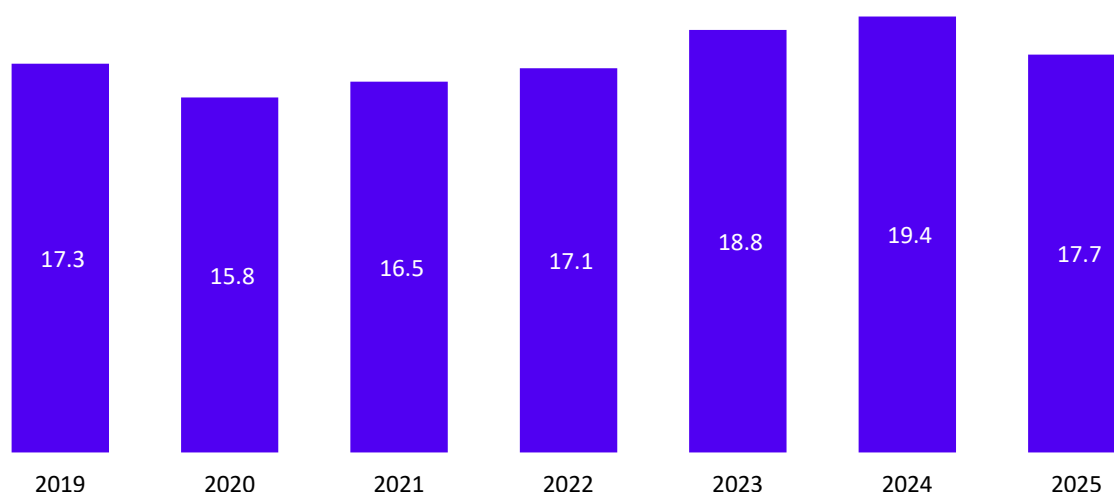
Source: Ofcom/broadcasters.

BBC ALBA decreased its spend on first-run content

BBC ALBA, the Gaelic-language channel run in partnership between MG ALBA and the BBC, spent £17.7m on first-run programming in 2025, a decrease of £1.7m (8.8%) compared to 2024. This decrease in spend was accompanied by a sharper decline in first-run hours (14.6%), from 638 in 2024 to 545 in 2025, indicating an increased cost per hour for BBC ALBA's first-run programming in 2025.

²⁵ This may include some co-commissions between BBC network and non-network services. From 2022 onwards, if such programmes were broadcast on regional opt-outs first, the spend is captured as part of the BBC's regional programming spend.

Figure 26: BBC ALBA spend (£m) on first-run UK-originated content: 2019-2025



Source: Ofcom/broadcasters.

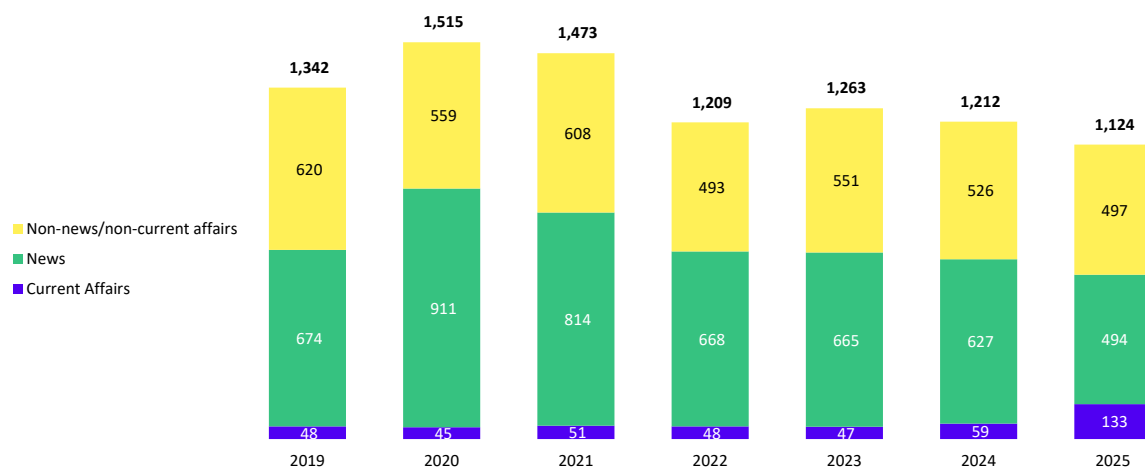
First-run BBC output in Scotland fell by 7% to 1,124 hours

BBC first-run output in Scotland totalled 1,124 hours in 2025, a decrease of 88 hours (7.3%) from 2024. This represents the lowest annual total since the BBC Scotland channel launched in 2019.

The largest reduction was in news output, which fell by 133 hours to 494 hours (down 21.2%). This decline reflects several factors, including the absence of the previous year's General Election coverage and the end of *The Nine* on BBC Scotland, which was replaced by *Reporting Scotland: News at Seven*. Despite this fall, news still accounted for 44% of the BBC's first-run hours in 2025.

In contrast, first-run current affairs output more than doubled, increasing by 74 hours to 133 hours. This marks the highest annual total for the genre since 2015 (199 hours). The growth was driven primarily by the launch of BBC Scotland's *Scotcast*, which alone contributed over 84 hours in 2025, as well as an expansion of hours for the series *Disclosure*. Current affairs accounted for 12% of first-run BBC output in Scotland in 2025—the highest proportion since 2016 (13%).

Figure 27: BBC hours of first-run UK-originated content for Scotland, by genre: 2019-2025



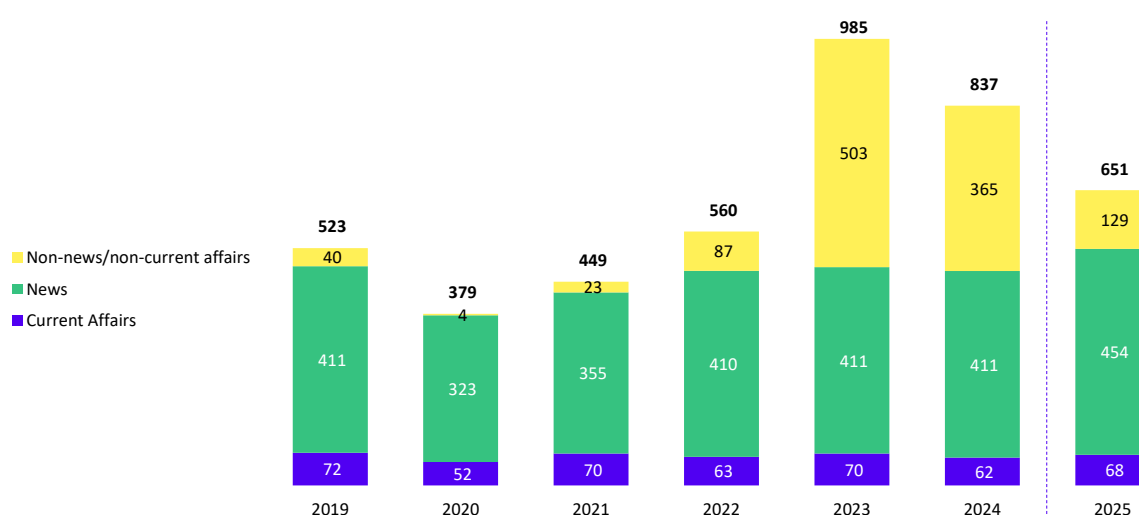
Source: Ofcom/broadcasters.

STV broadcast 651 hours of first-run content for Scotland in 2025

News programming accounted for 70% (454 hours) of STV's first-run output in 2025. Current affairs accounted for 10% (68 hours), while non-news and non-current affairs programming represented 20% of output (129 hours). Due to a methodological change introduced this year, STV's 2025 output is not directly comparable with previous years.

News remained the largest component of STV's first-run output. Non-news and non-current affairs programming represented the second-largest category, although a reduction in hours for the overnight information programme *Night Vision* resulted in a smaller share of output than in previous years. Current affairs programming accounted for 10% of first-run output, with the scheduling of *Scotland Tonight* returning to a more typical pattern following disruption caused by UEFA Euro 2024 coverage in the previous year.

Figure 28: STV hours of first-run UK-originated content for Scotland, by genre: 2019-2025



Source: Ofcom/broadcasters. As of 2025 there were adjustments in STV methodology for calculating nations and regions output – as a result 2025 is not directly comparable to previous years.

Network content produced in Scotland

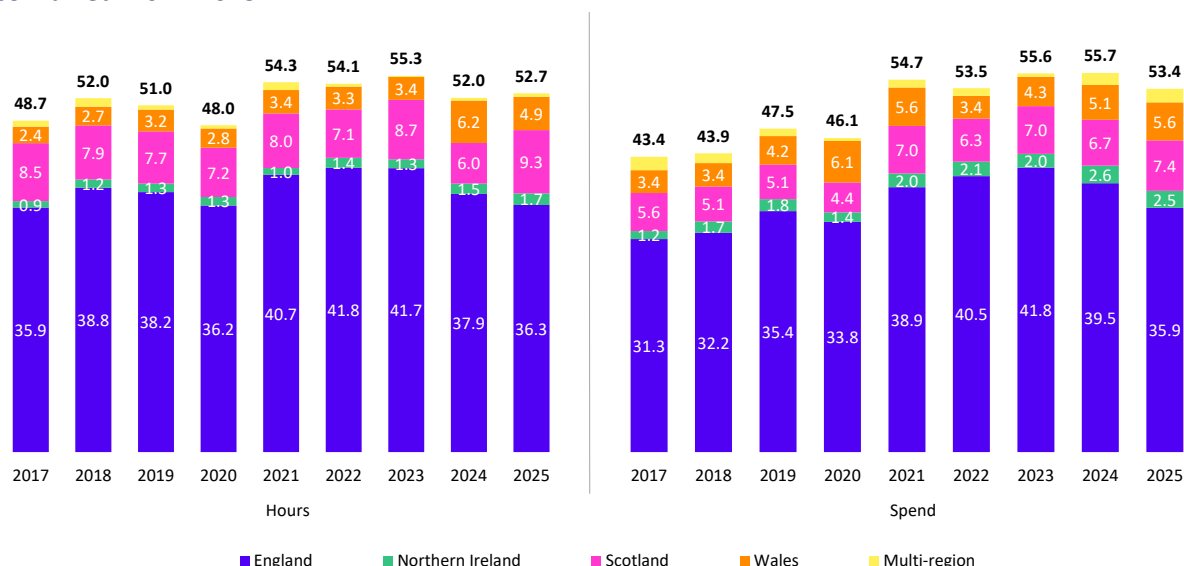
Some public service broadcasters are required to make programmes in a range of places around the UK for broadcast on their network TV channels. The broadcasters have quotas relating to the proportion of qualifying hours and the proportion of qualifying spend that must be attributable to areas outside London.²⁶ The BBC has individual quotas for each of the UK nations, and Channel 4 also has an out-of-England quota. ITV and Channel 5 are not specifically required to make content outside England.

Across all PSBs in 2025, 7.4% of qualifying first-run network spend was on programmes allocated to Scotland, alongside 9.3% of qualifying hours. Spend increased slightly from 6.7% in 2024, reflecting steady investment in programmes qualifying as made in Scotland by the BBC and ITV. The proportion

²⁶ 'Qualifying' hours and spend refer to the total output and investment considered towards quotas. In the case of regional production quotas, this refers to first-run UK-originated programming, excluding news programming, acquisitions and self-promotional content.

of hours increased by 3.7 percentage points year on year, driven by higher output from the BBC, ITV and Channel 4.

Figure 29: Proportion (%) of qualifying network hours and spend outside London, all PSBs combined: 2017-2025



Source: Ofcom/broadcasters.

Spend from BBC programmes allocated to Scotland remained steady, while that of other PSBs declined

The BBC, which accounts for the majority of qualifying network content made in Scotland, increased its proportion of spend in 2025 by 0.7 percentage points to 10.4%. Its proportion of hours grew by 8.6 percentage points to 19.8%.

Much of this increase in hours comes from sport managed from Sunset+Vine Productions' Glasgow base. This included the Women's Euros 2025, coverage of which won a [BAFTA](#), and the Snooker World Championship. In addition, more hours came from hobbies and leisure titles such as *The Bidding Room* and *The Travelling Auctioneers*.

ITV's proportion of hours allocated to Scotland increased marginally, and its proportion of spend rose from 3.7% in 2024 to 5.5% in 2025. Contributions to this included detective drama *Karen Pirie* and thriller *Coldwater*. Meanwhile, Channel 4's proportion of spend fell from 5% to 4.2%, while its proportion of hours rose from 4.1% to 4.6%. The cancellation of comedy-horror series *Generation Z* contributed to Channel 4's spend decrease, although this was partially offset by the introduction of drama series *Summerwater* and knitting competition show *Game of Wool*. Channel 5's proportion of spend qualifying as made in Scotland slipped from 4.6% to 2.9% in 2024, mainly from no new episodes of documentary series *The Motorway* and *Sunshine Getaways with Amanda Lamb* in 2025.

Figure 30: Proportion (%) of qualifying network production allocated to Scotland, by PSB: 2020-2025



Source: Ofcom/broadcasters.

Radio and audio

Market developments

Investment in commercial radio across Scotland

In January 2026, STV launched STV Radio, a Scotland-focused national commercial radio service aimed primarily at adults aged 35-54. Based at Pacific Quay in Glasgow but with presenters based across Scotland, the service is available on DAB as well as online. The company positioned the station as part of its broader 'FastFwd to 2030' strategy, combining broadcast, streaming and audio in a new "Audience" division and promising advertisers a multiplatform and hyper-targeted commercial proposition.

Earlier in 2026, Bauer added local news, traffic and weather content to its nationwide Hits Radio station which is available on DAB in Scotland. Bauer also announced further investment in its services in Scotland, with Clyde 1 set to move its studios from Clydebank to Bauer's new city centre Queen Street offices which will be the new home of popular shows such as *Bowie at Breakfast*.

First Scottish Podcast Awards

The first Scotland-specific Podcast Awards took place in Glasgow on 25 June 2026, in partnership with Spotify. Founders Sixty Steps Productions said the awards were created to showcase and elevate the wealth of Scottish talent and creativity within the country's podcasting scene, while also recognising work that highlights Scotland's rich cultural output.

Nominations were open not only to Scottish creators but also globally, reflecting the organisers' recognition that Scottish audiences consume content from around the world. The prize for 'Podcast of the Year' was awarded to *The Ford & Shelby Show*, and the Emerging Talent category was won by *The Reading Café*. The Reading Café is hosted by Scottish high school students who interview authors of young adult and children's fiction in the hope of encouraging young people to read.

Small-scale DAB

Over the past year, small-scale DAB licensing and rollout has continued to take place around Scotland, with Round 7 awards for Oban and the Western Isles being made in the second half of 2025, and the North Ayrshire multiplex coming on air in January this year, carrying stations such as Lomond Radio, Wild Country and Rock Scot. As part of our 8th and final round of planned licensing we awarded SSDAB licences for South West Fife, Ullapool and Skye and Lochalsh. Licence award decisions were published on our website in the financial year 25/26 with invitations for applications having been posted in the previous financial year.

Radio availability and coverage

National and local DAB coverage across Scotland in March 2026 was at the same level as in the previous year. However, following the launch of additional small-scale DAB multiplexes (for example in Ayrshire), small-scale DAB coverage increased to 40.1% of homes in Scotland.

Figure 31: DAB coverage as at March 2026

		BBC	Commercial			Small-scale
			Digital One	Sound Digital	Local DAB	
UK	Homes	97.4%	91.7%	82.6%	92.0%	52.7%
	Major roads	87.4%	80.2%	72.6%	76.8%	Not Measured
England	Homes	98.4%	94.8%	86.7%	93.4%	55.8%
	Major roads	94.5%	93.9%	89.8%	87.4%	Not Measured
Scotland	Homes	95.3%	81.7%	69.0%	85.4%	40.1%
	Major roads	69.1%	45.5%	33.6%	45.6%	Not Measured
Wales	Homes	92.2%	67.5%	56.9%	83.1%	31.1% ²⁷
	Major roads	78.1%	53.3%	37.7%	61.9%	Not Measured
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%	39.1%
	Major roads	79.3%	86.9%	55.0%	87.8%	Not Measured

Source: Arqiva, BBC, Ofcom. Note: Coverage of SSDAB is measured on a homes basis only.

Live radio listening in Scotland

Where our data comes from

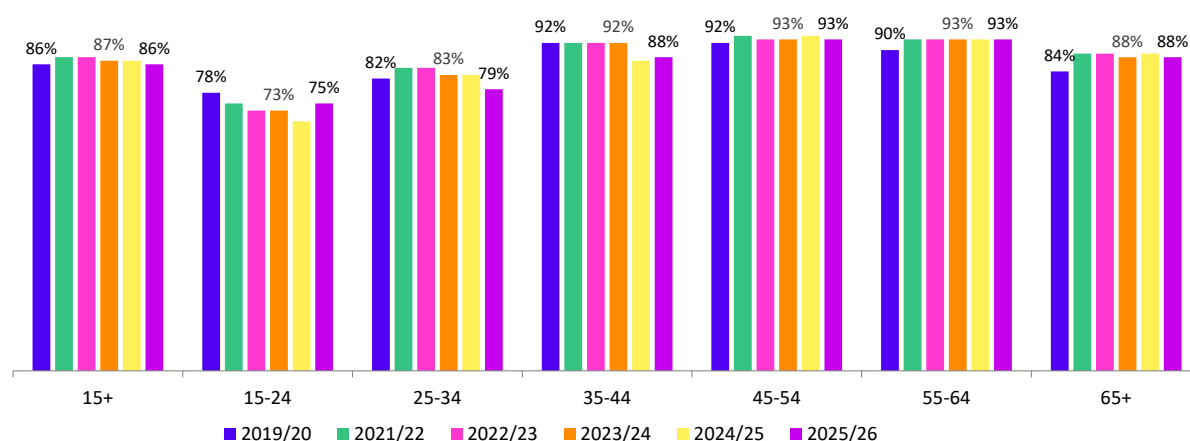
Our figures for reach of audio services come from our Audio Survey, whose participants are aged 16 and above. Figures on share of listening to different audio types come from IPA TouchPoints, and figures on live radio listening come from RAJAR, which use participants aged 16+ and 15+, respectively. We have used the term ‘adults’ here when referring to all three sources. See the [Annex](#) for more detail on data sources and methodology.

Overall radio listening

Weekly reach of radio in Scotland for 2025/26 was 86% of adults, a figure which has been broadly consistent for a number of years. The RAJAR survey suggests some fluctuation in the proportion of 15-24 -year-olds in Scotland listening to the radio over the past few years, dipping to 70% in 2024/25, although it increased to 75% in 2025/6. The listening patterns across the other age groups in Scotland are relatively stable, but it will be interesting to monitor the reach to 25-44 year-olds in future reports following a dip in 2025/6.

²⁷ The figure for small-scale DAB coverage in Wales was incorrectly reported in the Media Nations 2025 report as 35.1%. The correct figure for March 2025 is 30.7%. Although no further multiplexes launched between 1 April 2025 and 31 March 2026, there has been a slight increase in coverage in Wales from multiplexes situated in England.

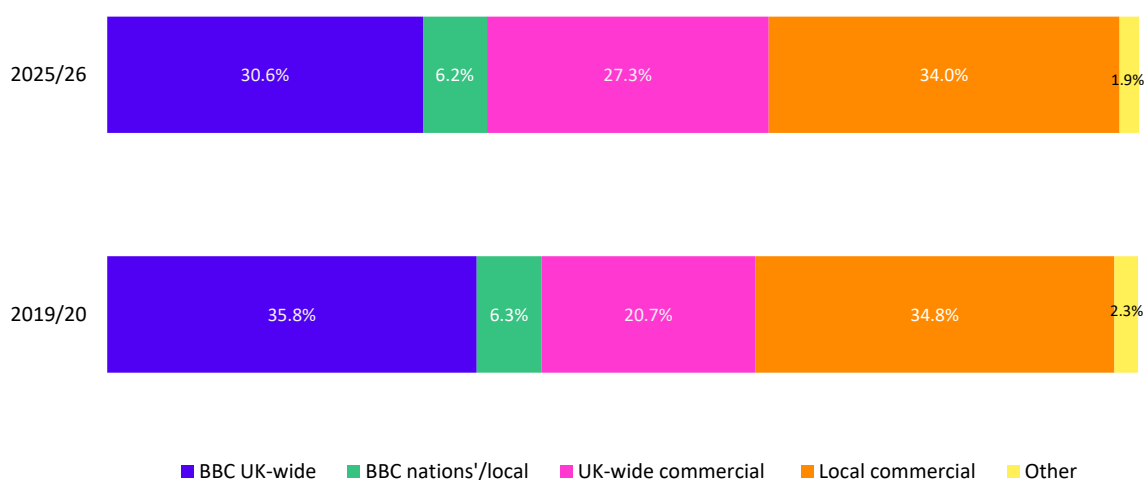
Figure 32: Weekly reach of radio in Scotland, by age: 2019/20 – 2025/26



Source: RAJAR; BBC Radio Scotland TSA; Q1 with 12-month weighting.

Comparing listening by sector within Scotland, BBC UK-wide stations have fallen from 36% market share in 2019/20 to 31% over the past year. In contrast, commercial UK-wide stations have increased their market share to over 27% from less than 21% six years ago. The other sectors have remained stable over that period.

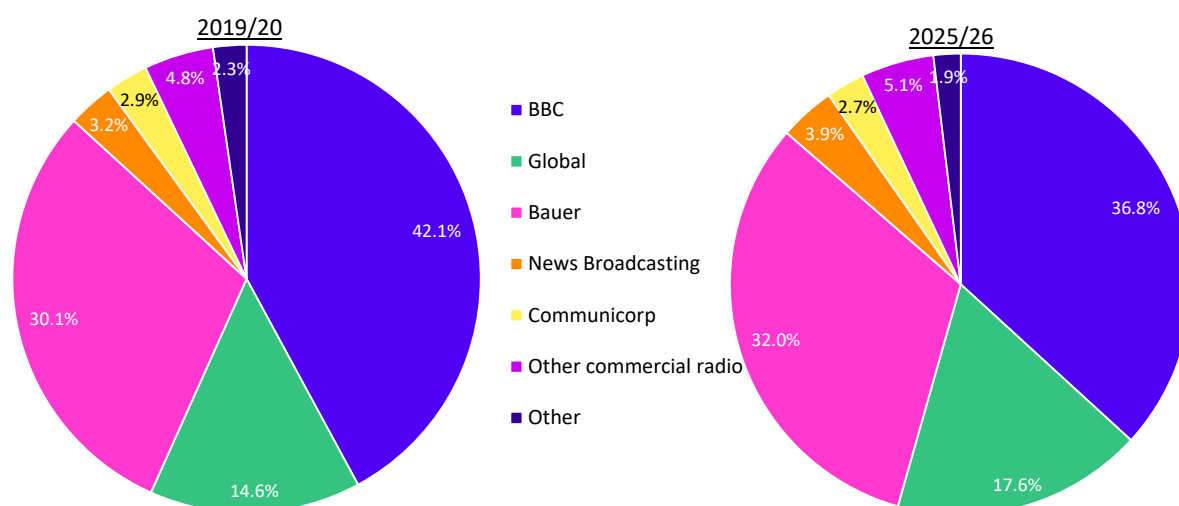
Figure 33: Share of listening in Scotland, by sector: 2019/20 vs 2025/26



Source: RAJAR; BBC Radio Scotland TSA; Q1 with 12-month weighting.

Looking at how listening in Scotland varies across commercial broadcaster groups, there have been increases across the board over the past six years, but in particular for Global (14.6% to 17.6%). The number of radio stations available has expanded listener choice by offering a range of different music genres on digital platforms.

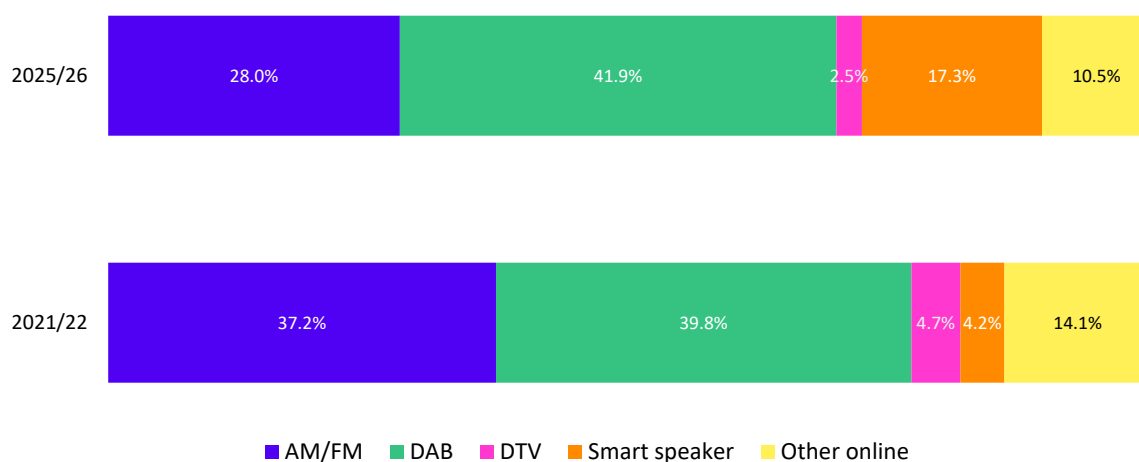
Figure 34: Share of listening by broadcaster group, in Scotland: 2019/20 vs 2025/26



Source: RAJAR; BBC Radio Scotland TSA; Q1 with 12-month weighting.

How people in Scotland listen to radio has shifted significantly, even over the past four years since smart speakers were added to the RAJAR survey. In 2021/22, almost two-fifths (37.2%) of listening was through an AM/FM radio set, on a par with listening through DAB sets (39.8%), and 18.3% was online. In the most recent twelve-month period, DAB accounts for over two fifths of listening (41.9%), with online and analogue listening now on a par with each other (27.8% and 28.0% respectively).

Figure 35: Share of listening by platform in Scotland: 2019/20 vs 2025/26



Source: RAJAR; BBC Radio Scotland TSA; Q1 with 12-month weighting.

Localness continues to appeal across Scotland

Across Scotland as a whole and in the Central Belt area, where the majority of the population lives, the top five stations are shared between BBC stations, UK-wide and BBC Radio Scotland, and Bauer's Clyde 1 and Forth 1. While these two are part of Bauer's Hits Radio Network, these stations continue to broadcast under the original heritage banners, and feature local news, traffic and travel and breakfast shows. In contrast, in the North East of Scotland, while BBC Radio 2 has a strong market share at 15.3%, Original 106 - the DC Thomson local station - holds a very strong second

position with a share of 12.7%. And as seen with Clyde 1 and Forth 1 in other parts of Scotland, Northsound 1, part of the Hits Radio Network, retains its heritage branding and with it, the third-place spot.

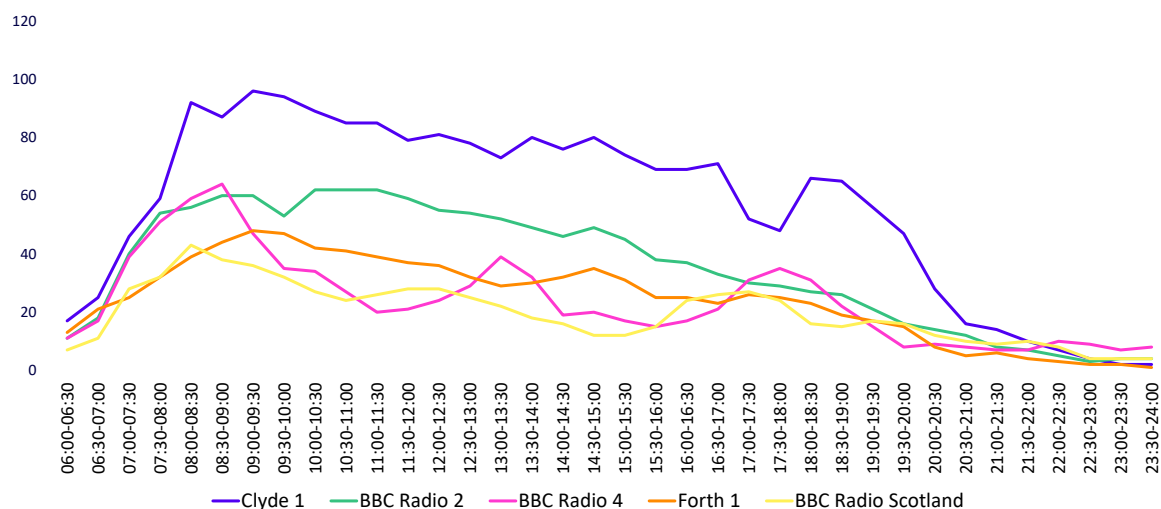
Figure 36: Top five stations across Scotland, the Central Belt and the North East of Scotland, ranked by market share: Q1 2026

Area	Rank	Station	Market share %	Broadcaster
Across Scotland	1	BBC Radio 2	11.9	BBC
	2	Clyde 1	8.8	Bauer
	3	BBC Radio 4	6.8	BBC
	4	BBC Radio Scotland	6.3	BBC
	5	Forth 1	3.7	Bauer
Central Belt	1	Clyde 1	13.3	Bauer
	2	BBC Radio 2	9.2	BBC
	3	BBC Radio 4	6.2	BBC
	4	Forth 1	5.9	Bauer
	5	BBC Radio Scotland	5.8	BBC
North East Scotland	1	BBC Radio 2	15.3	BBC
	2	Original 106	12.7	DC Thomson
	3	Northsound 1	9.8	Bauer
	4	Greatest Hits Radio (NE Scotland)	5.1	Bauer
	5	BBC Radio Scotland	5.0	BBC

Source: RAJAR Q1 2026; BBC Radio Scotland TSA; Capital Scotland TSA; Greatest Hits Radio North East Scotland TSA; Automatic weighting.

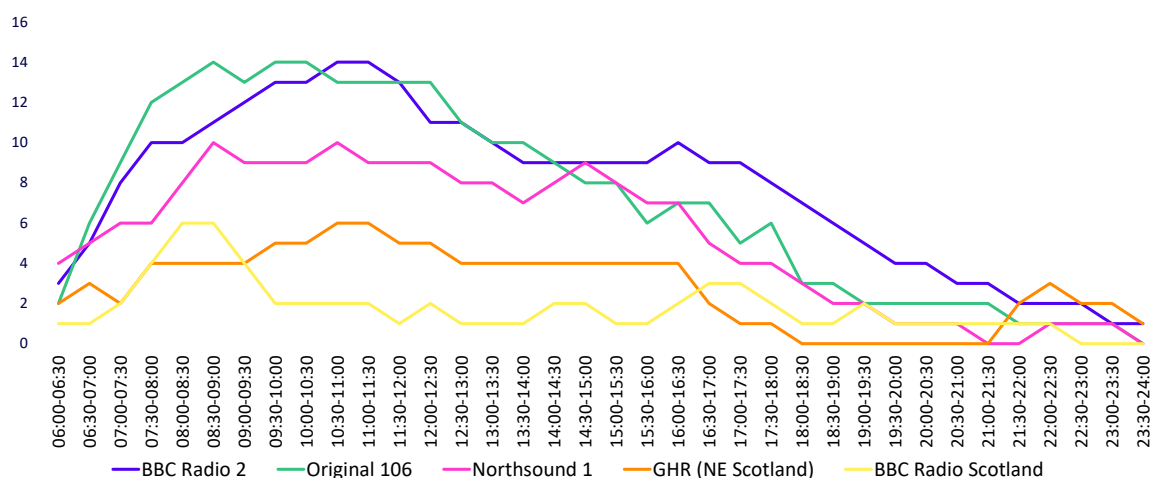
The two charts below show the pattern of listening to each of these top five stations across weekdays. In the Central Belt region, Clyde 1 maintains a lead across the whole day, starting with its locally-made *Bowie at Breakfast*, with a further spike at 6pm when the long-running *Superscoreboard* begins. In the North East of Scotland, DC Thomson's station for Aberdeen and the surrounding area, Original 106, holds steady alongside BBC Radio 2 for much of the working day.

Figure 37: Average audience (000s) across the day for the top five stations in the Central Belt region, Mon-Fri: Q1 2026



Source: RAJAR Q1 2026; Capital Scotland TSA; 6-month weighting

Figure 38: Average audience (000s) across the day for the top five stations in North East Scotland, Mon-Fri: Q1 2026

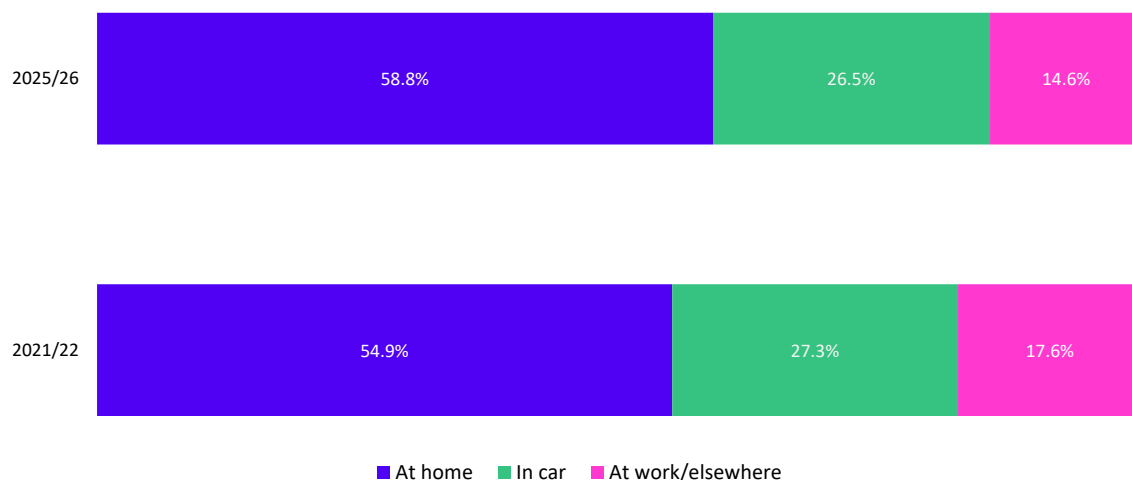


Source: RAJAR Q1 2026; Greatest Hits Radio (NE Scotland) TSA; 12-month weighting

Looking at where people in Scotland listen to the radio, the majority of this time is at home, accounting for 59% of all weekly hours. The proportion of time spent listening to the radio at work has decreased, perhaps reflecting the shift for some people to work from home. Time spent listening to the radio in a car or other vehicle has remained relatively steady over the past four years, accounting for around a quarter of listening hours. Around a quarter (24%) of radio listeners in Scotland only listen to the radio in a vehicle; in 2019/20 this figure was 18%, demonstrating the importance of in-car listening to the radio industry.

However, as people become more used to accessing audio in other ways in their cars, this could shift over time. In our latest Audio Survey, we asked people if they had used a voice assistant in the past three months, and 53% of adults in Scotland said they had (52% across UK). Among those who had used voice assistants in Scotland, 19% said they had used it to listen to radio through their smartphone in the car (vs. 12% across the UK) and 18% said they had used it to listen to music streaming through their phone in the car (vs. 15% across the UK).

Figure 39: Share of listening, by location in Scotland: 2019/20 vs 2025/26



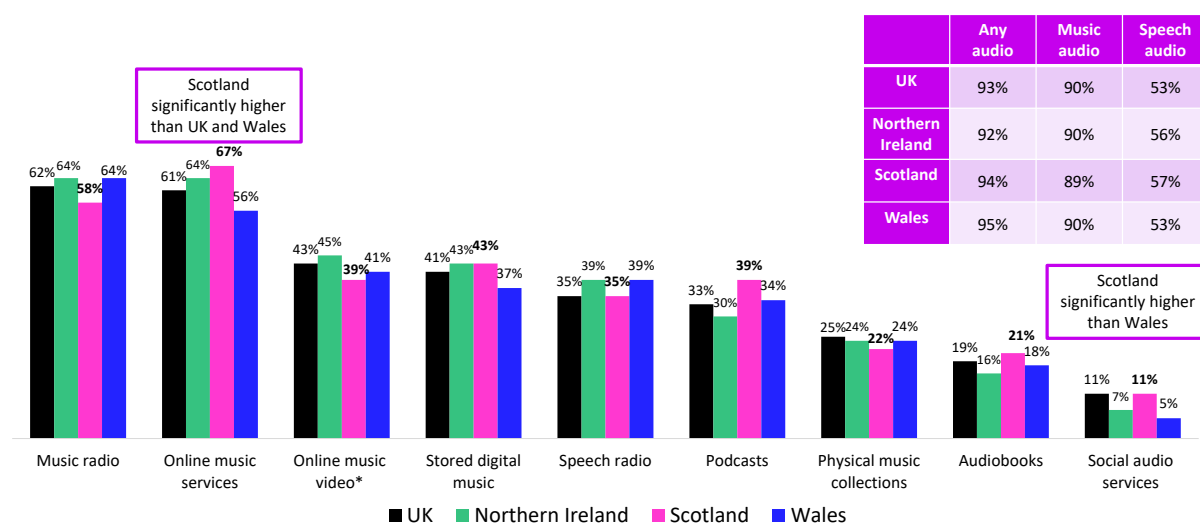
Source: RAJAR; BBC Radio Scotland TSA; Q1 with 12-month weighting.

Online listening in Scotland

Over two-thirds of adults in Scotland listen to music streaming each week

Almost all (94%) of adults in Scotland listen to some type of audio content in a week, listening to an average of 3.6 different audio types from the selection in Figure 40. The most listened to audio type is online music services, reaching 67% of adults in Scotland, significantly higher than the UK as a whole. The most used service for streaming music is Spotify, with 52% of adults in Scotland listening each week to music through the premium or free version.

Figure 40: Weekly reach of different types of audio, by nation: 2026



Source: Ofcom Audio Survey 2026. Q1 How often, if at all, do you listen to any of the following? Base: All adult respondents NET: Weekly. *For background listening

Figure 41: Weekly reach of online music streaming services, by nation: 2026

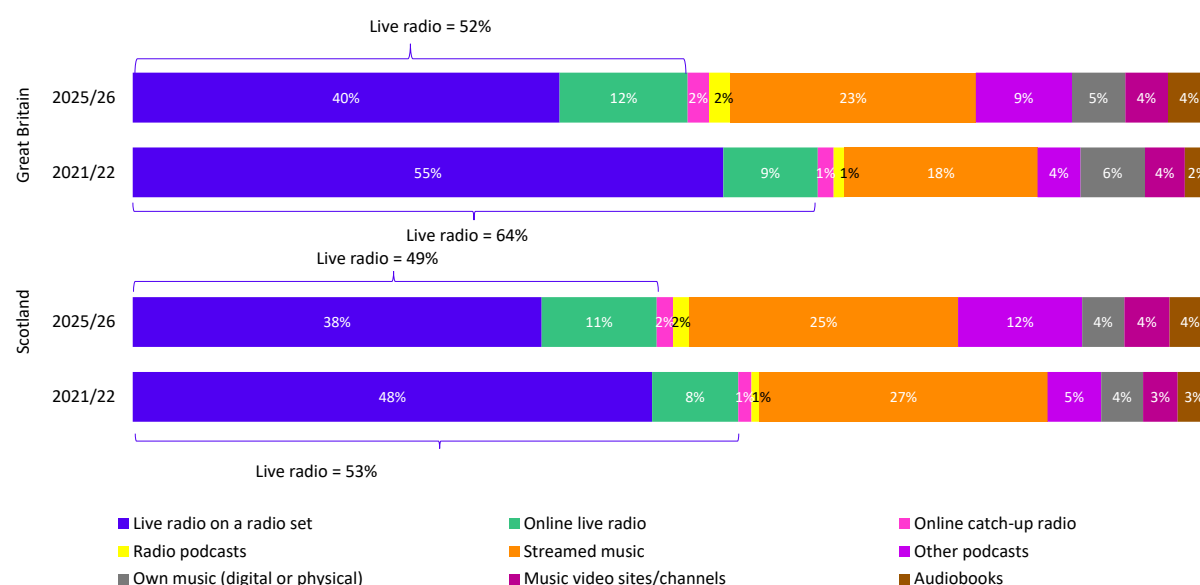
	UK	Northern Ireland	Scotland	Wales
Spotify (net)	49%	49%	52%	44%
YouTube (net)	38%	44%	40%	31%
Amazon Music (net)	19%	19%	18%	20%
BBC Sounds	15%	14%	15%	14%
Apple Music	15%	12%	15%	13%

Source: Ofcom Audio Survey 2026. Q1 How often, if at all, do you listen to any of the following? Base: All adult respondents NET: Weekly. YouTube is asked in terms of when it is used for 'background listening'.

Half of all time spent listening to audio in Scotland is to live radio

There has been a gradual shift in the type of audio people spend their time listening to. However, this shift has not been as marked in Scotland over the past four years compared to Great Britain²⁸ as a whole. Live radio listening in Scotland now accounts for 49% of weekly audio time compared to 53% in 2021/22 while the fall across the UK has been more marked over the same period (64% to 52%). The biggest shift over that period in Scotland is the amount of time given to podcasts (both radio podcasts and other podcasts), accounting for just 6% of audio time each week in 2021/22 and now representing 14% of all time spent on any audio service.

Figure 42: Share of time spent each week on any audio: Scotland vs Great Britain



Source: IPA TouchPoints SuperHub

²⁸ The IPA TouchPoints survey is across Great Britain only (excluding Northern Ireland) whereas RAJAR is surveyed across the whole of the UK.

Podcasts

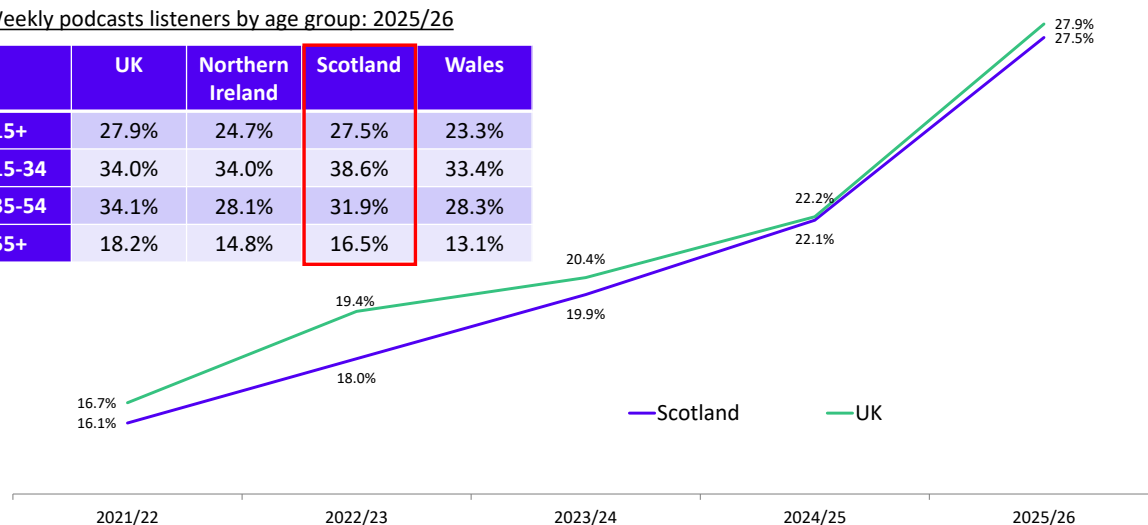
More people in Scotland listen to podcasts than in Wales or Northern Ireland

Twenty-eight per cent of adults in Scotland now listen to podcasts each week, up from 16% four years ago. This is a higher proportion than in either Northern Ireland or Wales, and is driven in particular by almost two-fifths of 15-34 year olds in Scotland listening to this audio type (39%), the highest proportion of any nation for this age group.

Figure 43: Weekly reach of podcasts over time: 2021/22 vs 2025/26

Weekly podcasts listeners by age group: 2025/26

	UK	Northern Ireland	Scotland	Wales
15+	27.9%	24.7%	27.5%	23.3%
15-34	34.0%	34.0%	38.6%	33.4%
35-54	34.1%	28.1%	31.9%	28.3%
55+	18.2%	14.8%	16.5%	13.1%



Source: RAJAR; BBC Radio Scotland TSA; Q1 with 12-month weighting.

At least four in ten regular podcast listeners in Scotland listen to a news and current affairs or politics podcast each week

Podcasts in the News and Current Affairs genre have the highest weekly reach in Scotland, with 47% of regular podcast listeners listening to a podcast in this genre each week, in line with the UK average. Entertainment podcasts, listened to by 44% of weekly podcast listeners across the UK as a whole, have a 37% weekly reach in Scotland. People in Scotland were less likely than those in the UK as a whole to listen to podcasts each week on health and well-being (27% in Scotland vs. 35% UK average) and discussion and talk shows (31% in Scotland vs. 40% for the UK).

Figure 44: Top ten types of podcasts listened to at least weekly, by adults in Scotland: 2026

	Genre	Reach
1	News and Current Affairs	47%
2	Politics	40%
3=	Comedy / Entertainment	37%
3=	Entertainment	37%
4	Society and Culture	35%
5=	Discussion and Talk Shows	31%
5=	Music	31%
6	Football	29%
7=	Health and Wellbeing	27%
7=	True Crime	27%
8	Science and Technology	26%
9=	Arts & Culture	25%
9=	Hobbies	25%
10=	Fiction / Drama	24%
10=	Food	24%

Source: Ofcom 2026 Podcast Survey Base: All regular podcast listeners in Scotland n=201.

Scottish sport features in the top ten podcasts listened to by people in Scotland

The *Open Goal Football Show*, which covers Scottish football, reached 4.0% of people 15+ in Scotland in 2025/6 - the highest reach of any podcast with a focus on Scottish content and ranking fifth overall for reach among audiences in Scotland. The next highest ranked podcast with content about or targeted towards audiences in Scotland was BBC's Radio Scotland's *Scotcast* podcast, which reached 2.4% listeners (ranked 14th).

Figure 45: Top 10 podcasts in Scotland with the largest weekly reach: twelve months to Q1 2026

	Title	Producer	Reach	Genre
1	The Joe Rogan Experience	Spotify	8.7%	Comedy
2	The Rest is Politics	Goalhanger Podcasts	4.9%	News
3	The Rest is History	Goalhanger Podcasts	4.9%	History
4	Newscast	BBC Radio	4.7%	News
5	Open Goal - Football Show	Independent	4.0%	Sports
6	The Diary of A CEO with Steven Bartlett	The Diary of A CEO	3.9%	Business
7	Americast	BBC	3.7%	News
8	The Rest Is Football	Goalhanger Podcasts	3.2%	Sports
9	Sh**ged Married Annoyed	Independent	3.1%	Comedy
10	That Peter Crouch Podcast	Tall or Nothing	2.7%	Sports

Source: Edison Podcast Metrics UK, Q2 2025 – Q1 2026. Base: Weekly podcast listeners aged 15 and older in Scotland (656). Genres reflect the broad primary genre category chosen by the podcast creator on Apple Podcasts, as defined by Apple. Percentage refers to percent of weekly podcast listeners who listen to the podcast.

Podcasts in Gaelic

A range of organisations and individuals produce podcasts in the Gaelic language, although our analysis of Podcast Index data²⁹ suggests these are far fewer in number than those in Welsh and Irish with 13 titles having at least two episodes.³⁰ Examples of these include several podcasts from BBC Radio nan Gàidheal such as music podcast *Òran Ùr* and independent podcasts such as discussion podcast *Big Gaels Don't Cry*, as well as podcasts from church organisations.

²⁹ We identified podcasts in the Podcast Index data set whose RSS feed identified the language as Gaelic with the tag <gd>. We then manually checked this to remove podcasts where the <gd> code for Gaelic did not appear consistent with other aspects of the podcast such as language spoken or the podcast description or title. We note in particular that some podcasts in Welsh and Irish appeared to use the <gd> tag for language. We also note that it is possible that there are other podcasts in Gaelic which do not use the <gd> tag in their RSS feed, meaning the total numbers could be understated.