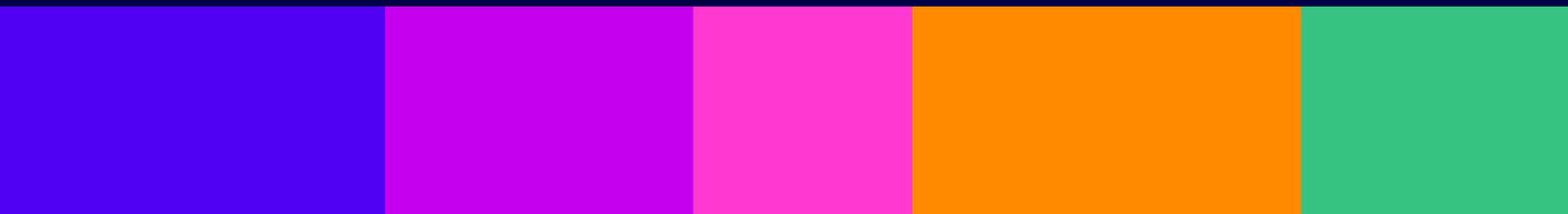




Media Nations

Scotland 2024

Published 31 July 2024



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Overview

Introduction

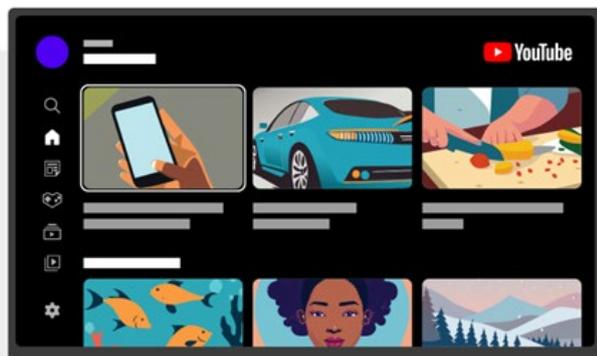
This *Media Nations: Scotland* report reviews key trends in the media sector and sets out how audiences are served in Scotland. We adopt a cross-platform perspective, reviewing broadcast TV and radio, as well as digital delivery including online video and audio streaming.

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

Audiences in Scotland spent 56 minutes a day watching video-sharing platforms, such as YouTube – more than the other UK Nations



68%
of those in Scotland who had watched a PSB channel in the past 6 months said they were **satisfied with PSBs overall**



Scotland had the highest level of interest in news about their nation
88% were ‘very interested’ or ‘quite interested’



Happy Valley was the most-watched programme in Scotland



The reach of podcasts has more than doubled in Scotland in the past six years
Up to 19.9% in 2024 from 9.4% in 2018



Source: Ofcom Public Service Media Tracker 2023, Ofcom News Consumption Survey 2024, Barb, RAJAR.

TV and video

Market developments

Proposed changes to BBC Scotland news provision

The BBC [announced](#) on 20 February 2024 that it intended to reshape its news provision for audiences in Scotland. This would involve a change to the BBC Operating Licence via a reduction in the amount of news broadcast at peak hours, from 250 hours to 125 hours per year, on the BBC Scotland channel. Ofcom opened a [consultation](#) on this request on 3 May 2024 with the provisional view of accepting the change to the Operating Licence. The consultation closed on 4 June 2024. Ofcom is currently considering the responses and will publish a final decision in due course.

STV Studios continues to increase production capacity

In 2023/24, STV's production business, STV Studios, continued to grow in scale. In July 2023, STV Studios and Greenbird Media [announced](#) a merged business deal which brought Greenbird's network of 15 independent production companies into the STV Studios label. Some notable shows produced by Greenbird Media labels include *The Hit List* and *Lego Masters*, with *The Fortune Hotel* from Tuesday's Child being announced shortly after the acquisition was confirmed. This acquisition boosts the number of labels within STV Studios from nine to 24 and marks a major investment to enlarge STV's production capacity. STV Studios received recognition by being named 'Production Studio of the Year' at Edinburgh TV Festival Awards on 24 August 2023.

STV Studios also secured its first Netflix commission in March 2024: a three-part drama series, *The Witness*, which has been confirmed to be delivered in 2025. STV's [trading update](#), published on 5 June 2024, highlighted that STV Studios had secured future revenues of £86m by the end of May, including major new orders from Netflix, Sky and Discovery.

Major Gaelic production *An t-Eilean (The Island)* announced

BBC ALBA, the channel operating in partnership between the BBC and MG ALBA, recently announced the commission of *An t-Eilean (The Island)*, a new four-part crime thriller set in the Outer Hebrides. This will be the biggest Gaelic drama series in the channel's history, with its budget exceeding £1m per episode. *An t-Eilean* is being produced by BAFTA-winning Black Camel Pictures, with the development supported by Screen Scotland. Filming for this series began in Spring 2024 across Harris, Lewis and Glasgow, and is due to air on BBC ALBA in winter 2024/2025.

This commission aligns with MG ALBA's strategic focus on producing high quality content. As MG ALBA highlights in its [Lèirsinn: A Route Map for Gaelic Media](#) (2022-2027), one way in which it will demonstrate investment is via building scale through long-form drama, as well as by creating new and innovative collaborations with high economic potential. In MG Alba's [2023/24 Annual Report](#), it highlights that, with support from the independent distributor, All3Media International, *An t-Eilean (The Island)* will broadcast to an international audience, with All3Media having the global distribution rights.

Studio space in Scotland set to expand further

Across Scotland, the studio space available to host productions has continued to grow over the past year. [Plans were revealed in April 2024](#) for the construction of the new Stirling Studios, intended to bring significant investment and job opportunities to the Stirling and Forth Valley area. Stirling Studios will add to the range of facilities already in operation across Scotland, which includes:

Figure 1: Overview of studios currently operating in Scotland

Studio Name	Location	Date opened	Owner(s)	Recent productions
BBC Pacific Quay	Glasgow	2007	BBC Scotland	<i>Saturday Mash-Up!</i> , <i>Mrs Brown's Boys</i> , <i>The Hit List</i> , <i>Popmaster TV</i>
Kelvin Hall	Glasgow	2022	BBC Studioworks	<i>Bridge of Lies</i> , <i>Frankie Boyle's New World Order</i>
FirstStage Studios	Edinburgh	2020	First Stage Studios Ltd	<i>The Rig</i> , <i>Anansi Boys</i>
Wardpark Film and Television Studio	Cumbernauld	2013	Hackman Capital Partners and Square Mile Capital Management	<i>Outlander</i>
BBC Dumbarton Studios	Dumbarton	2002	BBC Scotland	<i>Still Game</i> , <i>Shetland</i> , <i>Two Doors Down</i> , <i>Vigil</i> , <i>River City</i>
Pyramids Studios	Bathgate	Filming from 2017	London and Regional Properties and Hackman Capital Partners	<i>Outlaw King</i> , <i>T2 Trainspotting</i> , <i>Good Omens</i>
Studio Alba	Stornoway	1996	MG ALBA	<i>An Clò Mòr</i> , <i>Dùbhlain DIY</i>

Success for Firecrest Films

Glasgow's Firecrest Films won 'Multichannel Production Company of the Year' at the 2024 Broadcast Digital Awards. A number of its programmes were broadcast in 2023, including a co-commission for BBC Scotland and BBC Factual, *Highland Cops*, and the second series of *Rescue: Extreme Medics* for Channel 4. Its production *Murdertrial*, for the BBC, also won a Broadcast Digital Award for Best Documentary programme.

Earlier in 2024, Firecrest won an Impact award from RTS Scotland for its talent development programme, which aims to nurture production talent in documentary-making.

TV services and devices

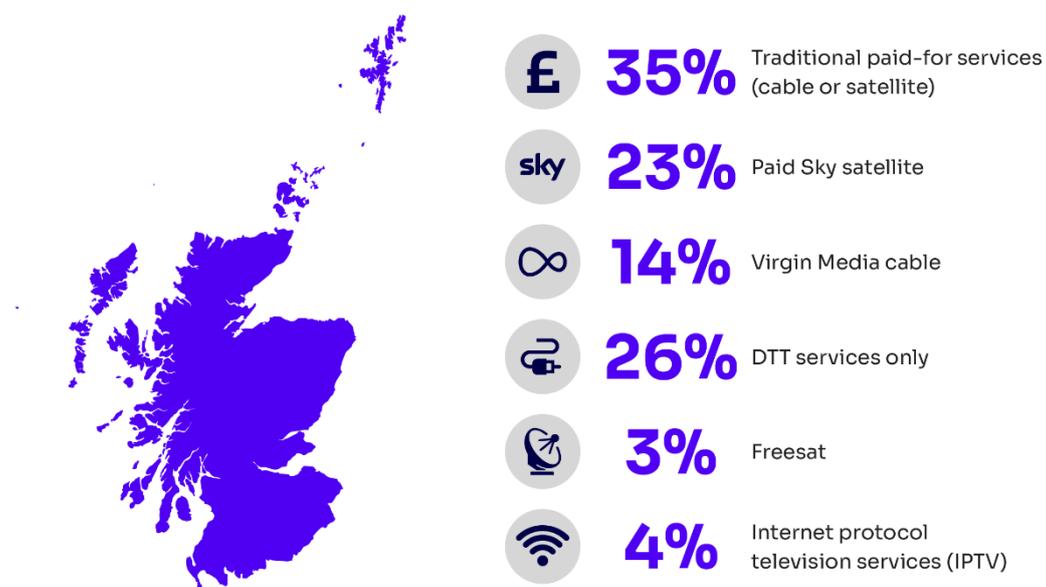
A quarter of Scottish households relied solely on DTT services in Q1 2024

In Q1 2024 the presence of TV sets in Scotland's households remained steady at 93%, not significantly different to the UK average of 94%. Traditional paid-for television services such as satellite and cable services were present in 35% of homes, similar to the previous year. The proportion of households receiving a paid-for Sky subscription fell from 27% to 23% in Q1 2023, while Virgin Media households remained fairly stable at 14%.

The proportion of households receiving *only* DTT services (delivered via aerial) also fell, dropping to 26% in Q1 2024, from 30% in Q1 2023, while 3% of households received free satellite services from Freesat or Sky. Despite the decline in paid-for satellite subscriptions, more households in Scotland received paid-for TV services than relied on Freeview or Freesat.

The use of internet protocol television (IPTV) services remained limited in Scotland, with only 4% of households receiving these services, down since Q1 2023 and returning to a similar level as in Q1 2022.

Figure 2: Take-up of TV platforms in Scotland: Q1 2024



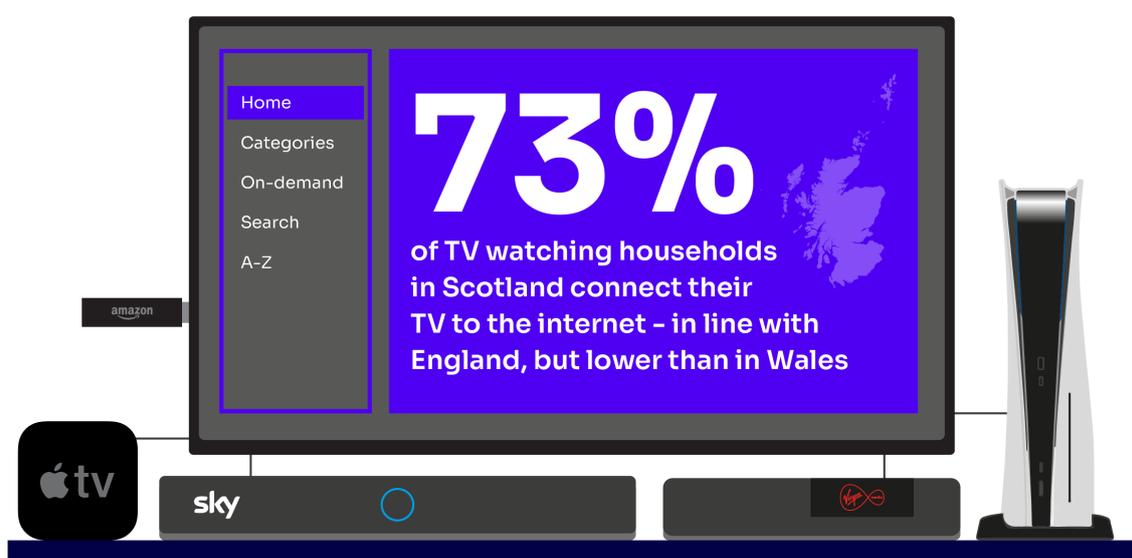
Source: Barb Establishment Survey Q1 2024. 'DTT services only' includes households with an aerial only and not cable, satellite or IPTV. IPTV includes BT Vision, TalkTalk or YouView. In the 2023 Media Nations report this included Plusnet, but this service is no longer available and has been removed from the survey.

Almost three in four TV users in Scotland with internet at home have connected TVs in 2024

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 (now EE TV). External devices such as streaming sticks and games consoles can also connect TV sets to the internet.

As measured in the first half of 2024, almost three-quarters (73%) of TV users in Scotland with internet at home had a connected TV using one of these methods. This was in line with the average across the UK, where 73% of TV homes had a connected TV.

Figure 3: Connected TVs in Scotland: 2024



Source: Ofcom Technology Tracker 2024. Question T6: Do you or does anyone in your household use the internet to watch content on your TV set using any of these methods? Base: TV-watching households with an internet connection that they use. Total UK (3,497), Northern Ireland (410), England (2,192), Scotland (453) and Wales (442).

Broadband in Scotland

More than nine in ten (93%) homes in Scotland had an internet connection, as measured in the first half of 2024, while 87% were using fixed broadband.¹ In September 2023 95% of all homes had access to superfast broadband with download speeds of at least 30 Mbit/s, and 73% of all households were using a superfast (or faster) service where available, up from 71% in 2022. Full-fibre services were available in 52% of all premises in Scotland in September 2023, and were being taken up in 28% of properties where they were available. Full-fibre availability increased to 58% of premises at the beginning of 2024.²

¹ Ofcom Technology Tracker 2024.

² Ofcom analysis of provider data. Please refer to [Connected Nations 2023 UK report](#), [Connected Nations: Scotland Report 2023](#) and [Connected Nations update: Spring 2024](#) for more information.

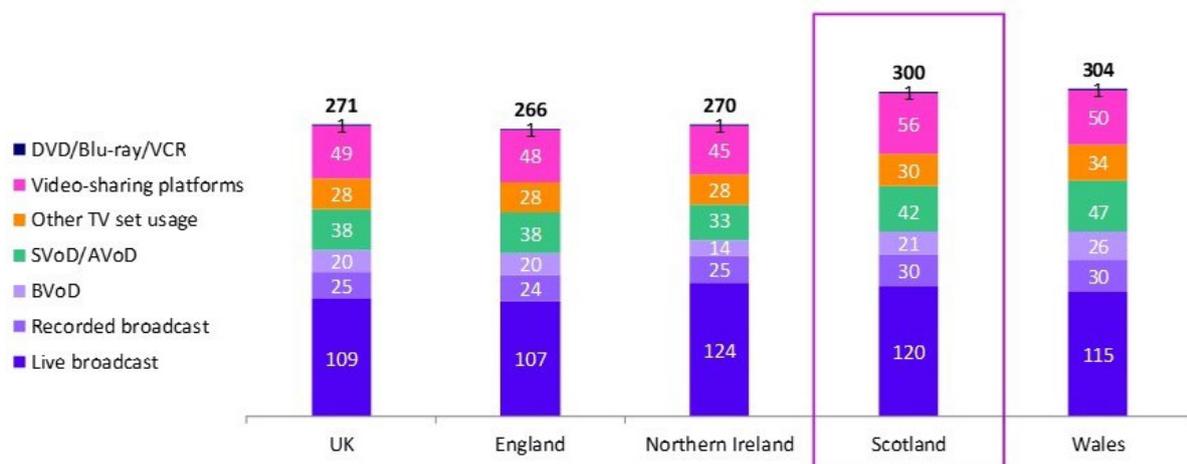
Viewing trends

Total in-home audiovisual viewing

Scotland watched the most content on VSPs such as YouTube in 2023

On average, people in Scotland watched just under 5 hours of video content per day in 2023 at home, the second highest in the UK nations. Audiences in Scotland watched the most content from broadcasters, jointly with Wales. This figure includes live TV, recorded TV and broadcaster video-on-demand (BVoD) and accounted for 57% of all viewing time (2 hours 51 minutes). Of this, two hours were live TV viewing, and 21 minutes were BVoD. The time spent viewing content on video-sharing platforms (VSPs) e.g. YouTube, was highest in Scotland, out of all the nations, while viewing of subscription video-on-demand (SVoD) services, e.g. Netflix, and advertising-supported video-on-demand (AVoD) services, e.g. Pluto TV, was lower in Scotland than in Wales.

Figure 4: Total in-home daily video viewing minutes per person, by platform and nation: 2023



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 usage' 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).

Broadcast TV viewing in Scotland

Where our data comes from

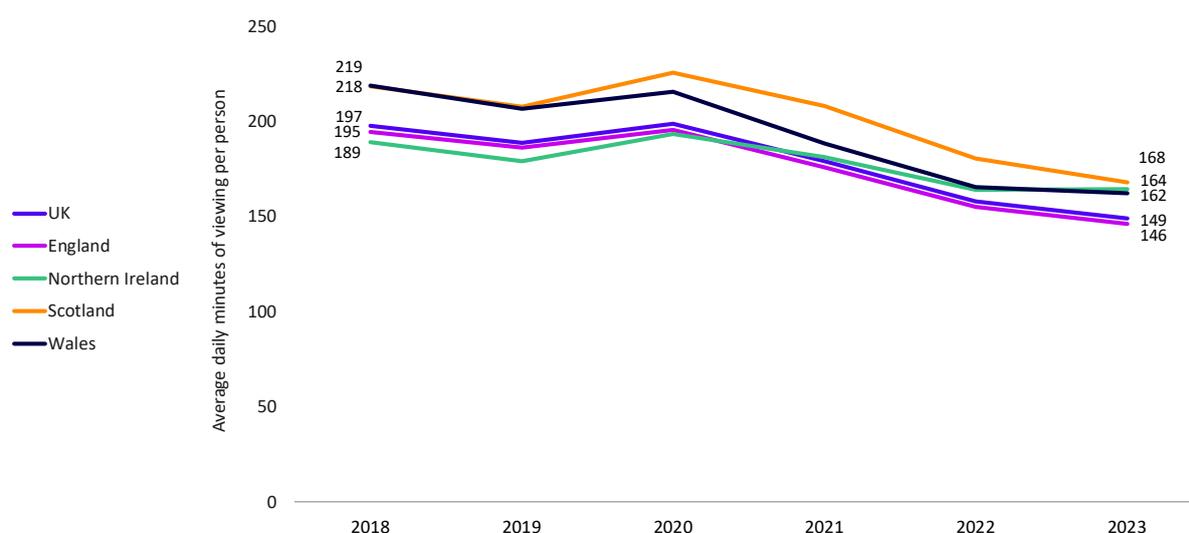
Most of the viewing data comes from Barb Audiences Ltd (Barb), the industry's standard for understanding what people watch. This includes viewing of broadcast TV through TV sets and via devices attached to TV sets, such as computers, streaming devices and set-top boxes. It also includes some viewing for online streaming services and for devices not connected to the TV being watched at home via WiFi only (any viewing via a mobile network is excluded). The number of households on the Barb panel in Scotland is about 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).

Broadcast TV viewing in Scotland declined by 7% in 2023

On average, people in Scotland spent 2 hours 48 minutes per day watching broadcast TV on the TV set in 2023, the most of any nation in the UK. This was down by 13 minutes compared to 2022. Proportionally, this represented a 7% decrease between 2022 and 2023: the largest decrease of any nation in the UK and the UK average of 5.8%.

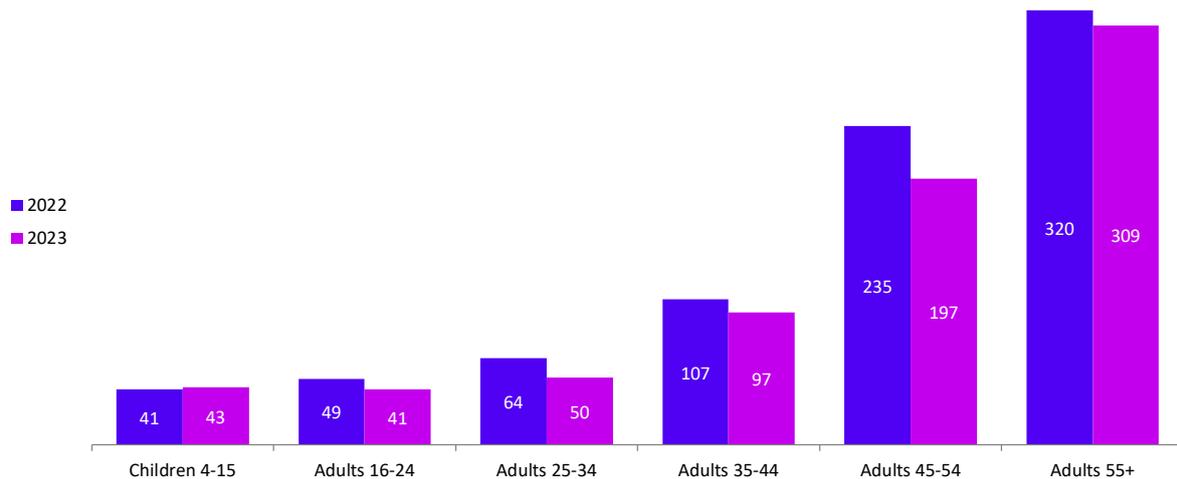
Figure 5: Average daily minutes viewed of broadcast TV per person, by nation: 2018-2023



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

In Scotland, viewing decreased among all adult groups. In line with the general trend across the UK, older people in Scotland watched more broadcast TV on the television set than younger viewers. Over-54s watched more than any other age group, at an average of 5 hours 10 minutes per day, down by 4% since 2022. Those aged 16-24 watched the least, at an average of 41 minutes per day, down by 17% since 2022.

Figure 6: Average daily minutes of broadcast TV viewed in Scotland, by age group: 2022-2023



Source: Barb 28 day consolidated, TV sets only. Small year-on-year differences in minutes are often not statistically significant.

Drama and entertainment rank top for Scotland viewing in 2023

The final episode of BBC One’s hit drama *Happy Valley* was the most-watched programme in Scotland in 2023, with an average audience of just under 1 million viewers. Entertainment and special events occupied the next four places in the top ten, with BBC One’s *Strictly Come Dancing* finale (890,000) and STV/ITV1’s *I’m A Celebrity...Get Me Out Of Here!* (832,000) taking second and third place respectively. In fourth and fifth places, BBC One’s coverage of the *Eurovision Song Contest* and the second part of *The Coronation of HM The King and Queen Camilla* averaged 809,000 and 773,000 viewers respectively.

Scotland was the only nation in which Channel 4 programming made the top ten most watched programmes list in 2023: coverage of an *International Football* friendly between Scotland and England, which averaged 759,000 viewers, was the sixth most-watched programme, and *The Great British Bake-Off* came eighth, with an average audience of 742,000 viewers.

Scottish crime drama *Shetland* was the seventh most-watched programme with an average of 751,000 viewers on BBC One. Scotland was the only nation in which BBC One’s *Doctor Who* achieved a place in the top ten programmes, taking ninth place with an average of 730,000 viewers.

Figure 7: Top ten most-watched programmes in Scotland: 2023

Rank	Title	Channel	Date broadcast	Average audience (000s)	Share* (%)
1	Happy Valley	BBC One	05/02/2023	965	40.9
2	Strictly Come Dancing	BBC One	16/12/2023	890	52.3
3	I'm a Celebrity... Get Me Out of Here!	STV/ITV1	20/11/2023	832	46.4
4	Eurovision Song Contest	BBC One	13/05/2023	809	60.7
5	The Coronation of The King and Queen Camilla (afternoon)	BBC One	06/05/2023	773	54.9
6	International Football	Channel 4	12/09/2023	759	46.4
7	Shetland	BBC One	22/11/2023	751	38.5
8	The Great British Bake Off	Channel 4	26/09/2023	742	42.5
9	Doctor Who	BBC One	25/11/2023	730	49.3
10	Death in Paradise	BBC One	27/01/2023	713	36.4

*Source: Barb 28-day consolidated including catch-up and on demand, on TV sets and other devices using the home's WiFi network, individuals 4+. Highest-performing episode of each title only, so does not include the second most-watched episode of Happy Valley (29 January on BBC One), for example. Includes +1 channels where applicable. *Share denotes the programme's audience as a percentage of the total audience for broadcast TV in the slot that the programme was on.*

The main five PSB channels lost share of total broadcast viewing

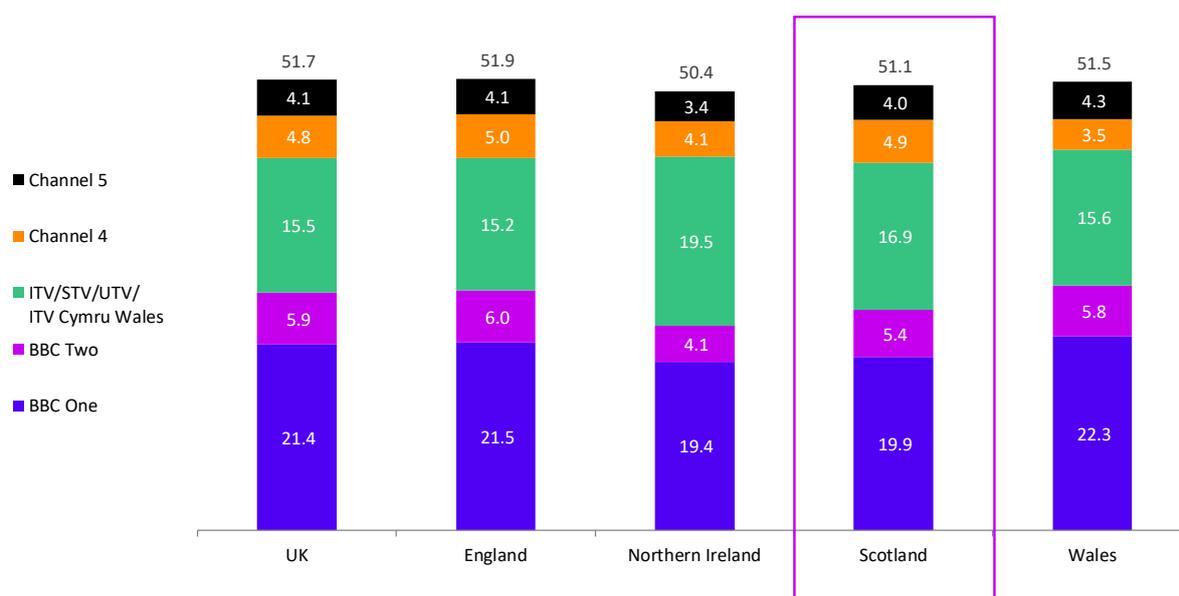
What is public service broadcasting?

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 2023, the main five PSB channels accounted for a combined 51.1% share of the total broadcast TV audience in Scotland; this was a decrease of 3.6 percentage points from 54.7% in 2022. BBC One had the highest audience share of any individual PSB channel, at 19.9% in Scotland; lower than the UK share of 21.4% and also lower than shares in England or Wales. The audience share for Scotland’s Channel 3 services from STV and ITV was 16.9%, 1.4 percentage points greater than the UK average, and second largest (after Northern Ireland) among the UK nations.

Figure 8: Share of broadcast TV viewing for the five main PSB channels, by nation: 2023 (%)



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

Audience attitudes and sentiments to PSBs

Overall, two-thirds of audiences in Scotland continue to say they are satisfied with PSBs

Ofcom’s Public Service Media (PSM) Tracker found that in Scotland, two-thirds (68%) of PSB viewers³ said they were satisfied with PSBs overall, remaining in line with the UK total (67%) and previous years. About one in ten (12%) said they were dissatisfied, in line with the UK total (12%) and previous years.

³ Ofcom Public Service Media Tracker 2023 defines PSB viewers as all who have watched a PSB channel/service in the past six months.

Figure 9: Satisfaction with PSBs overall, UK total and by nation: 2023

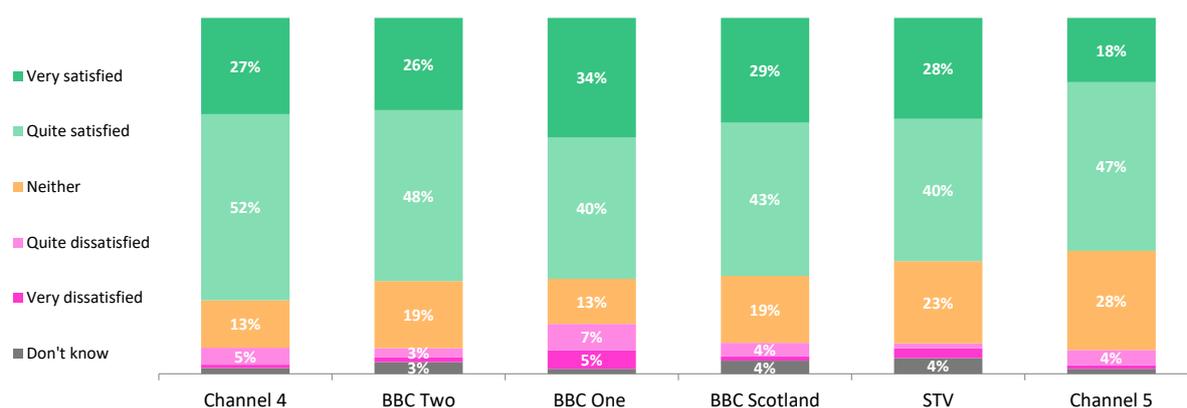


Source: Ofcom Public Service Media Tracker 2023. Question 28. And now, if you think about ALL the public service broadcaster channels combined, how satisfied are you that combined, they provide the different elements asked about in the previous question? Base: All who have watched PSB channel/service in past 6 months, Total UK (2,841), Northern Ireland (230), England (2,029), Scotland (293) and Wales (289). Note, not showing percentage labels under 4%.

A majority of PSB viewers in Scotland are satisfied with Channel 4, BBC Two, BBC One and BBC Scotland

When asked to consider PSB channels individually, about four in five (79%) viewers in the past six months said they were satisfied with Channel 4, followed by around three-quarters for BBC Two (74%), BBC One (73%) and BBC Scotland (72%). Slightly lower proportions said the same for STV (68%) and Channel 5 (65%).

Figure 10: Satisfaction with individual channels: 2023



Source: Ofcom Public Service Media Tracker 2023. Question 23. Thinking about some of the specific channels you have watched in the past 6 months, overall, how satisfied or dissatisfied are you with these TV channels? Base: All who have watched... in last 6 months, Channel 4 (253), BBC Two (224), BBC One (266), BBC Scotland (189), STV (243), Channel 5 (213). Note, not showing percentage labels under 3%.

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

In 2023, the PSM Tracker asked respondents⁴ to consider the three most important attributes for PSBs to deliver to society overall. Half (50%) of audiences in Scotland ranked *'trusted and accurate UK news'* in their top three, followed by *'a wide range of different types of programmes'* (46%) and *'programmes that help me to understand what is going on in the world today'* (30%).

There have been improvements in how viewers perceive PSB delivery of programmes that feature Scotland and local areas

Seven in ten PSB viewers in Scotland said PSBs overall performed *'well'*⁵ in providing *'programmes made for UK audiences'* (70%), *'appeal[ing] to a wide range of different audiences'* (69%), and *'a wide range of different types of programmes, such as drama, comedy, entertainment or sport'* (69%), all broadly in line with the other nations.

When looking at PSB attributes relating to representation, about three in five (59%) viewers said that PSBs delivered *'well'* on *'programmes that are relevant to me'* and more than half (53%) said that PSBs delivered *'programmes that feature people like me'*.

In 2023 there were improvements in perceptions relating to programming featuring Scotland and people's local area. Positive views on *'regional programmes that keep me informed about my area'* were up from 48% in 2022 to 57% in 2023, and on *'programmes that feature Scotland'* the score has increased steadily over the past three years (2021 42%; 2022 47%; 2023 56%). In 2023 on this measure, Scotland was higher than the UK total (49%).

Scotland differed from the UK overall in people's attitudes towards individual PSB channels. For example, viewers in Scotland were more likely to say that ITV and STV's TV channels delivered *'well'* on *'programmes that feature Scotland'* compared to the UK total (64% vs 46%).⁶

Video-on-demand viewing trends

Viewers in Scotland are using a wide range of subscription services

In Scotland, the proportion of households who received SVoD services was 69% in Q1 2024, having remained stable since the previous year.⁷

Ofcom's VoD survey showed that Netflix was the most popular SVoD service in Scotland, followed by Amazon Prime Video and Disney+, but many other SVoD services are also used in Scotland. These include Apple TV+ and Paramount+, and genre specialist services such as Hayu (reality TV) and Shudder (horror).

⁴ This question was asked of all respondents who completed the survey online, excluding those who completed it over the telephone.

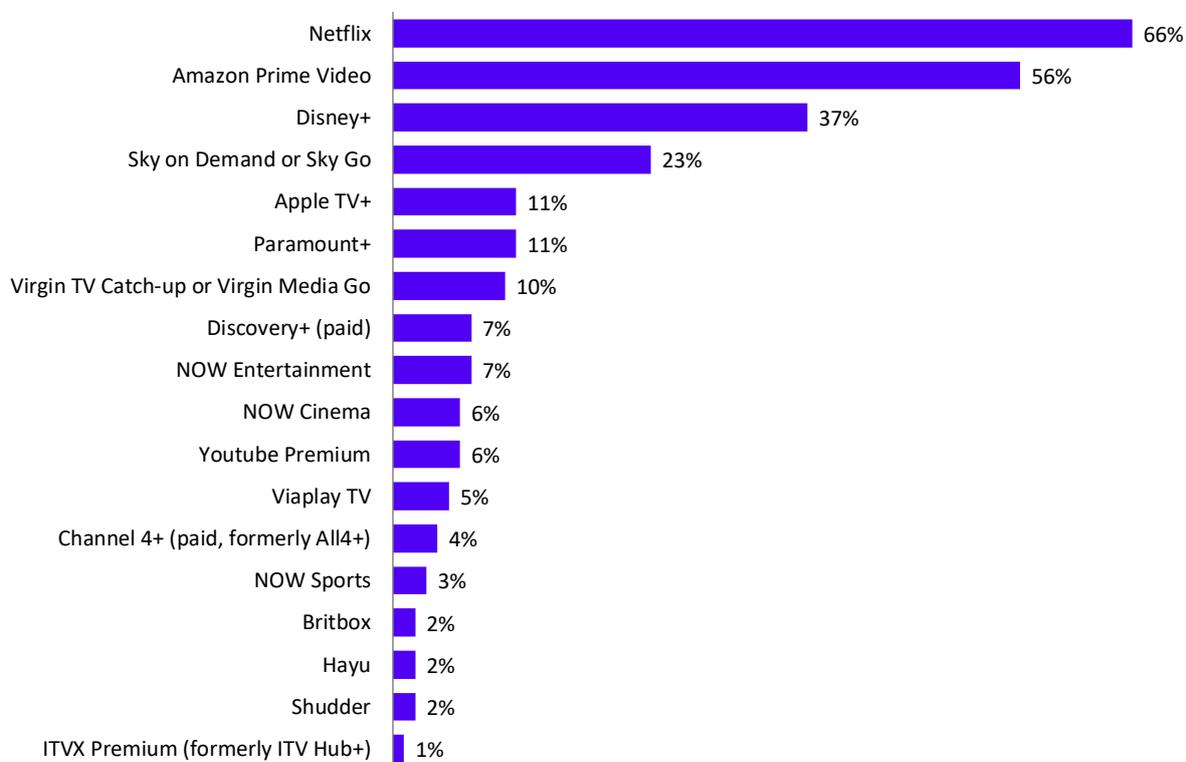
⁵ The Ofcom Public Service Media Tracker uses questions asking respondents to say how *'well'* or *'badly'* different elements are being provided, using a 1-10 scale where 1 means extremely badly and 10 means extremely well. When referring to *'well'* throughout this report, it is a NET of scores 7 to 10.

⁶ Ofcom Public Service Media Tracker 2023.

⁷ Barb Establishment Survey Q1 2024. This includes households who have an SVoD service on a free trial or access via a bundle or family account, as well as those who actively subscribe. Following changes to the Barb Establishment Survey questionnaire, household penetration of Discovery+ and Paramount+ rose sharply; this change captures households with passive subscriptions such as those with certain Sky packages.

Ofcom’s PSM Tracker shows that levels of satisfaction with SVoD services remain high; about nine in ten viewers in Scotland say they are satisfied with Netflix (86%), followed by Disney+ (80%) and Amazon Prime (77%).⁸

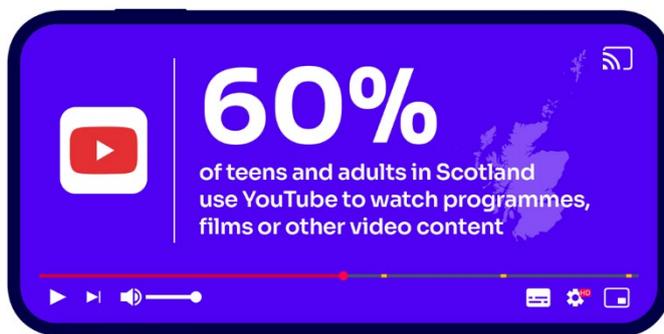
Figure 11: Claimed usage of SVoD services used to watch programmes, films or other video in Scotland: 2024



Source: Ofcom VoD Survey 2024 (combined online and CATI adults/teens aged 13+, Scotland. Services personally used in the last three months (fieldwork February – March 2024). Note: in the 2023 Media Nations reports we reported the claimed reach figures for these services using only the online sample. This year’s figures are therefore not comparable due to using the fuller online and CATI sample.

Sixty per cent of teens and adults in Scotland claimed to have used YouTube to watch programmes, films or other video content in the three months before the fieldwork.⁹

Similar to the other UK nations, in Scotland the most popular form of content viewed on YouTube was videos under 15 minutes (66%), while 45% reported that they watched content lasting longer than 15 minutes.



⁸ Ofcom Public Service Media Tracker 2023.

⁹ Ofcom VoD Survey 2024 (combined online and CATI sample). Note: some YouTube figures appear different between the nations, but the figures are not significantly different to each other.

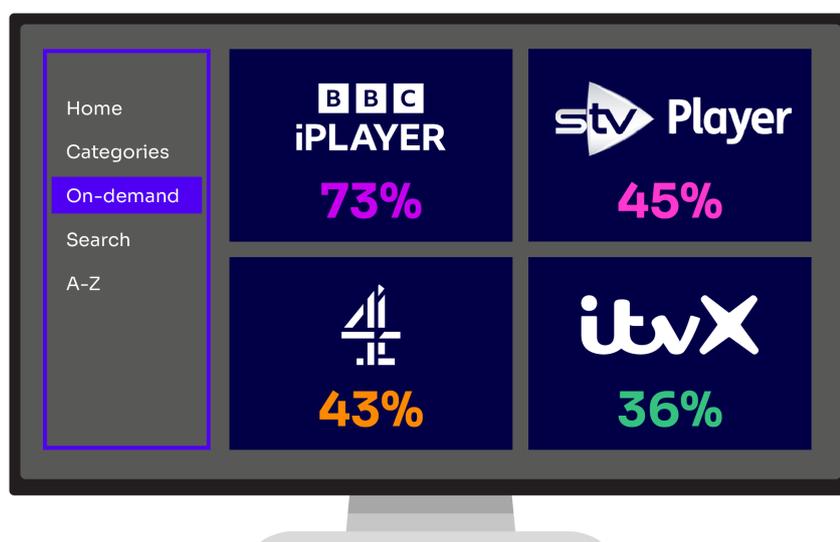
'YouTube Shorts' were only slightly less popular, with 41% reporting watching them, and 18% reported watching full-length programmes or films on YouTube.¹⁰

BBC iPlayer is the most popular PSB VoD service in Scotland

More than nine in ten (91%) of adults and teens in Scotland claim to have used a free-to-view service (any streaming service not behind a paywall, including YouTube), slightly lower than the other UK nations.

BBC iPlayer was the only PSB VoD to grow year on year, with nearly three-quarters of adults and teens in Scotland (73%) claiming to have used it in the three months before the fieldwork, up from 60% in 2023. Claimed use of STV Player was 45%, while 43% had used Channel 4 streaming over the same period. Thirty-six per cent said they had used ITVX in the three-month period, and 22% had used My5.

Figure 12: PSB video-on-demand services used to watch programmes, films or other video in the past three months: 2024



Source: Ofcom VoD Survey 2024 combined online and CATI adults/teens aged 13+, Scotland. Claimed reach for services personally used in the last three months (fieldwork February – March 2024). Note: in the 2023 Media Nations reports we reported the claimed reach figures for these services using only the online sample. This year's figures are therefore not comparable due to using the fuller online and CATI sample.

Overall, audiences in Scotland continue to say they are satisfied with BVoD services

When asked to consider their satisfaction with each BVoD service, just under nine in ten (87%) viewers in Scotland said they were satisfied with BBC iPlayer, followed by three-quarters who said the same for Channel 4 or the Channel 4+ streaming service (74%) and My5 (74%). Slightly lower proportions said they were satisfied with STV Player or STV Player+ (65%) and ITVX or ITVX Premium (63%).

¹⁰ Ofcom VoD Survey 2024 (online sample). Note: the 'short videos' category does not include 'YouTube Shorts'. YouTube Shorts are videos of 60 seconds or less. Similarly, long videos do not include full-length programmes and films.

In Scotland, BVoD viewers¹¹ said they used BVoD services ‘to catch up on programmes that I have missed on TV’ (63%), and so they could ‘watch what I want, when I want’ (46%). The most frequently cited reasons for not using BVoD services were preferring other services, not being interested in the programmes available, or not having access to the service.

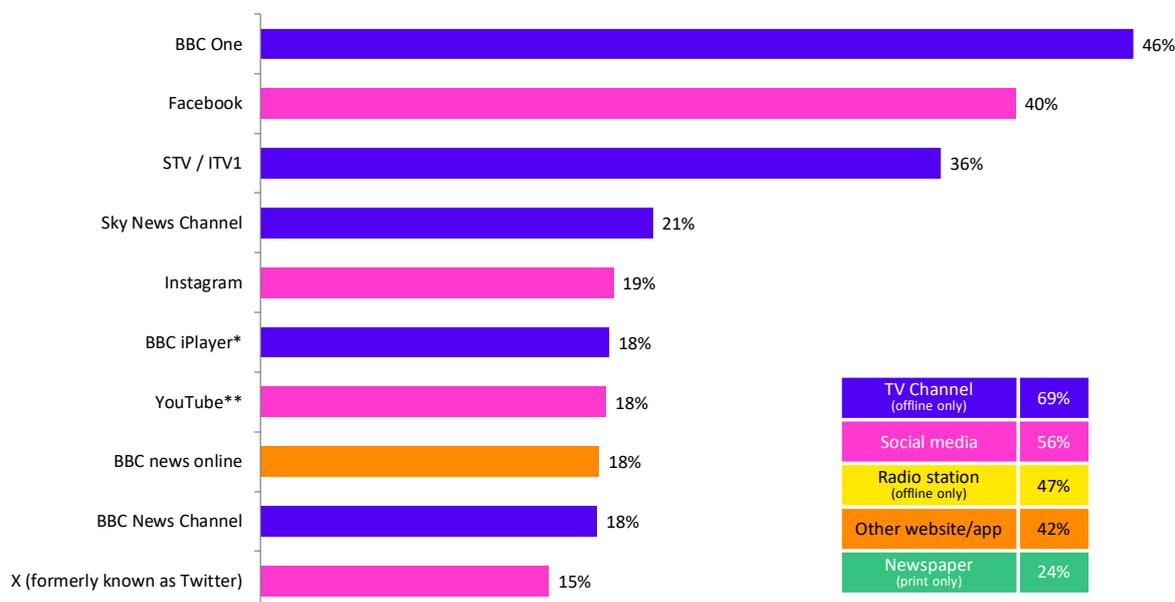
News sources

Most-used news sources in Scotland

Ofcom’s News Consumption Survey found that just under half of all people aged 16+ in Scotland (46%) use BBC One for general news, making it the most-used news source for people in Scotland. This is followed by Facebook (40%) and Scotland’s Channel 3 providers STV and ITV1 (36%); Sky News Channel (21%) and BBC News Channel (18%) are the other TV channels making up the top ten. Beyond Facebook, Instagram (19%) and X (formerly Twitter) (15%) are the other social media sites appearing in the top ten, while BBC news online is the highest-ranking news-specific website or app (18%).

In terms of using video-on-demand services for news, the most popular of these was BBC iPlayer (18%); the joint sixth most popular news source in Scotland, with 11% using STV Player and 10% using Channel 4.

Figure 13: Top ten sources of news in general in Scotland: 2024

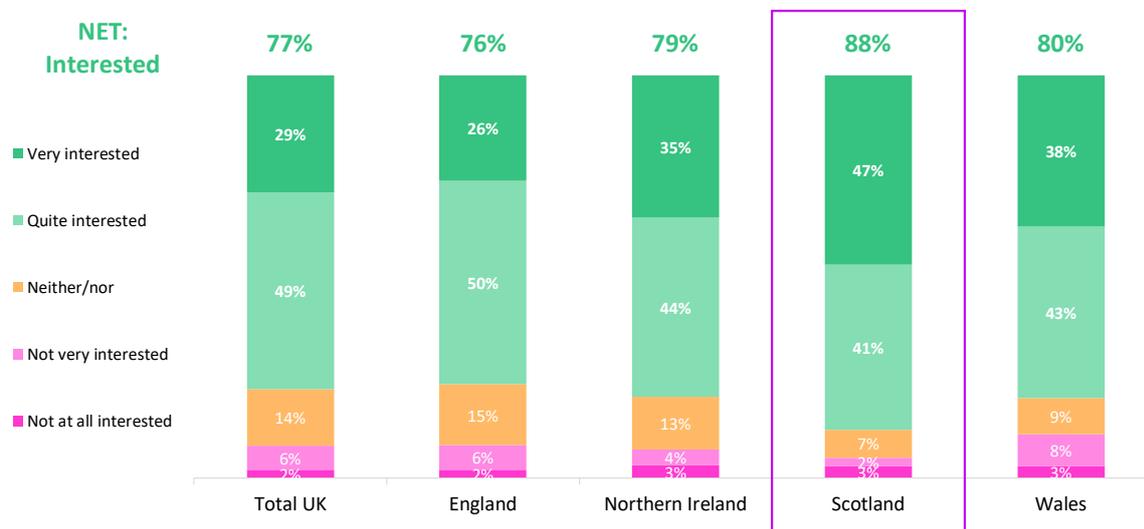


Source: Ofcom News Consumption Survey 2024 – Combined F2F and ONLINE sample. Question: C1. Which of the following platforms do you use for news nowadays? D2a-8a. Thinking specifically about <platform>, which of the following do you use for news nowadays? Base: All people 16+ in Scotland – 2024=664. *BBC iPlayer added in 2023. **YouTube moved from ‘other online’ to ‘social media’ in 2024 and figures are therefore not comparable with 2023.

¹¹ BVoD viewers are defined as those who have watched at least one BVoD service in the past six months.

There continues to be a significant amount of interest in news about Scotland. Just under half of all people aged 16+ in Scotland who follow news claim to be ‘very interested’ in news about Scotland (47%) – this is higher than the equivalent figures for other UK nations and rises to 88% for those who are either ‘very’ or ‘quite’ interested.

Figure 14: Level of interest in news about own nation, by nation: 2024



Source: Ofcom News Consumption Survey 2024 – Combined F2F and ONLINE sample Question: F3. How interested are you in news about your NATION/REGION? Base: All people 16+ who follow news 2024 - Total=5,250, England=3,404, Scotland=647, Wales=635, Northern Ireland=564.

Looking at the individual sources that people in Scotland use to access news about their own nation, Scotland's most popular public service broadcast services are also the most popular here. About a quarter (27%) use BBC One and STV, through programmes such as *Reporting Scotland* and *STV News at Six*, and for the BBC, the figure rises to 32% when BBC One and BBC Scotland’s news output are taken together.

Only 3% of people in Scotland say they don’t follow news about Scotland, less than those who claim to follow local news in England (11%) and Wales (9%).

Figure 15: Sources used to access news about own nation: 2024

England		Northern Ireland		Scotland		Wales	
BBC One	26%	BBC One	36%	BBC One	27%	BBC One	31%
Facebook	16%	UTV	34%	STV	27%	ITV WALES	23%
ITV1	16%	BBC Radio Ulster/ Foyle	19%	Facebook	21%	Facebook	18%
BBC news online	7%	Facebook	15%	BBC news online	10%	Any Wales based news sites/apps	11%
Instagram	6%	Cool FM	13%	BBC Scotland TV	8%	BBC news online	11%
BBC News Channel	5%	BBC news online	11%	Instagram	7%	BBC Radio Wales	6%
WhatsApp	5%	X (formerly Twitter)	8%	Clyde 1/ Forth 1/ West Sound/ Tay FM/ Northsound/ MFR	7%		
X (formerly Twitter)	5%	Any NI based news sites/apps	6%	BBC Radio Scotland	6%		
YouTube	5%	RTE Channels/Virgin Media One	6%	X (formerly Twitter)	6%		
		The Belfast Telegraph	5%	Sky News Channel	6%		
		U105	5%	BBC News Channel	5%		
				YouTube	5%		
Don't follow region news	11%	Don't follow Nation news	2%	Don't follow Nation news	3%	Don't follow Nation news	9%

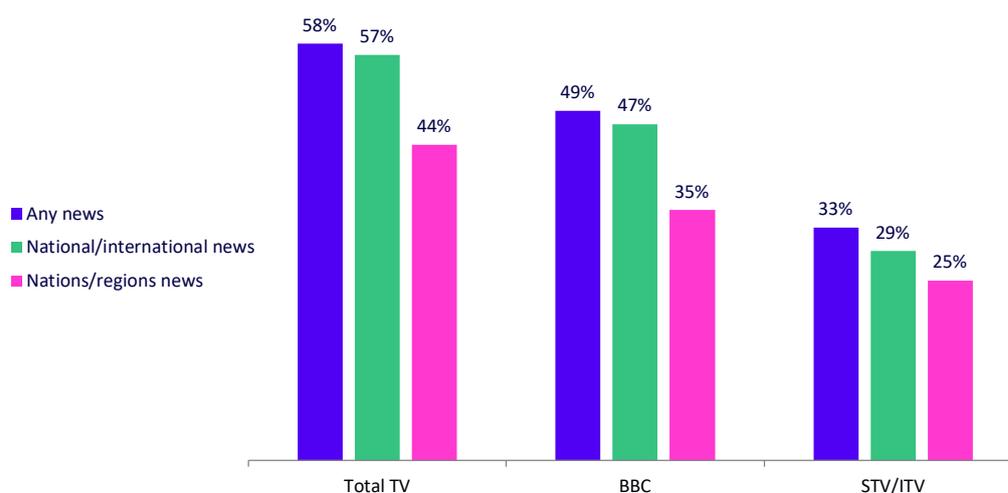
Source: Ofcom News Consumption Survey 2024 – COMBINED F2F & ONLINE sample Question: F6. From which of the following sources do you get news about what is going on in NATION/REGION nowadays? Base: All people 16+ using TV/newspapers/radio/online/magazine for news 2024 – England=3,340, Scotland=632, Wales=627, Northern Ireland=545. Only sources with an incidence of 5%+ in each nation are shown.

Viewing of news from the nations/regions was above the UK average in Scotland

Looking now at the way news viewing was split between b and news types, nations/regions news viewing in Scotland was slightly ahead of average. Forty-four per cent of people (the second highest of the UK nations) viewed this type of news, compared to 40% for the UK as a whole. Overall news viewing in Scotland was in line with the UK average in 2023, with 58% of those aged 16+ viewing any news content on any TV channel (UK average: 57%).

Viewers in Scotland are more likely to turn to the BBC rather than STV/ITV for their TV news, by a margin of 16 percentage points. In contrast with this, and with the trend in England and Wales, the weekday early evening news on STV/ITV at 6pm is typically viewed by more people aged 16+ than the BBC’s regional evening news at 6:30pm, with audiences 23% higher, on average.¹²

Figure 16: Average weekly reach for news in Scotland, by broadcaster: 2023



Source: Barb, all transmissions, 28-day consolidated, average weekly reach 3+ mins %, people 16+. Genre: nations/regions news; UK/international news. National/international news refers to network news programmes which contain the same content UK-wide. Nations/regions news refers to news programmes that are broadcast from and to England, Northern Ireland, Scotland or Wales, or regions within those nations. Programme examples include BBC Reporting Scotland and STV News at Six.

¹² Barb, all transmissions, 28-day consolidated, average audience 1800-1859, weekdays only. Region: BBC Scotland.

TV programming 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.

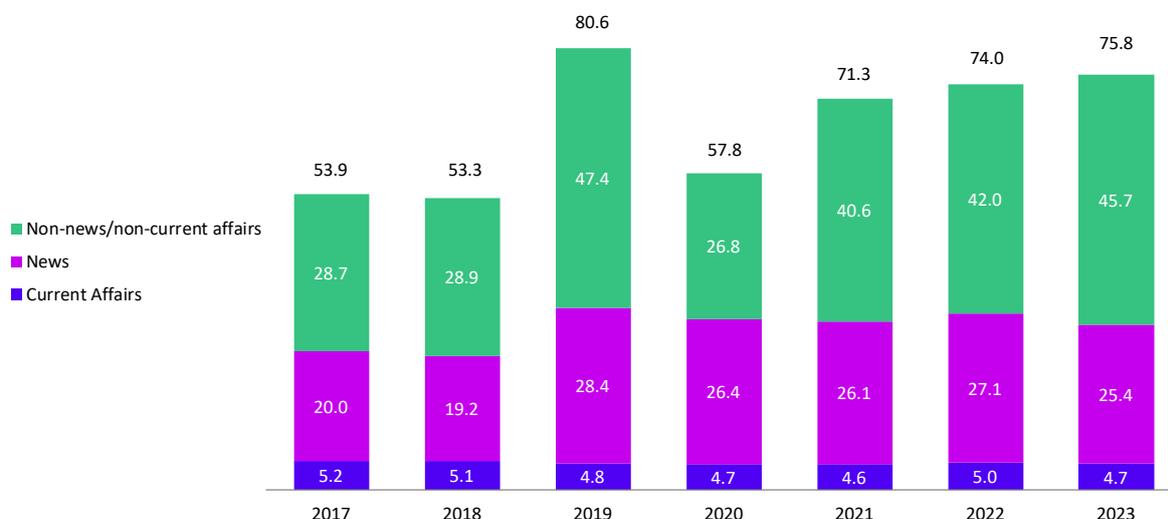
How we present financial data

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 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 rose

The BBC and STV provide programming specifically for viewers in Scotland across a range of genres, and spend on such content increased by 2.4% in 2023, to £75.8m. The majority (60.3%) went towards non-news/non-current affairs programmes, an increase of 9.0% (£3.8m) year on year. Meanwhile, the PSBs collectively spent less on current affairs (-5.2%) and news (-6.4%) than in 2022.

Figure 17: PSB spend on first-run UK-originated content for Scotland, by genre: 2017-2023 (£m)

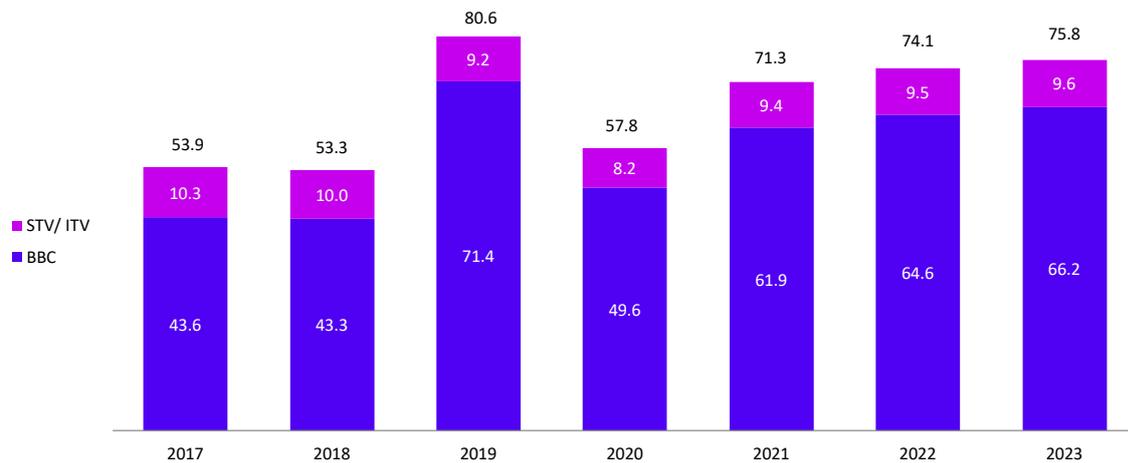


Source: Ofcom/broadcasters.

BBC Scotland and STV/ITV both increased their spend

The vast majority of PSB spend on first-run programming for viewers in Scotland in 2023 was from BBC Scotland, rising to £66.2m in 2023 (+2.6%). Meanwhile, spend by the Channel 3 services, STV and ITV1, increased to £9.6m (+1.4%).

Figure 18: BBC and STV/ITV spend on non-network first-run UK-originated content for Scotland: 2017-2023 (£m)

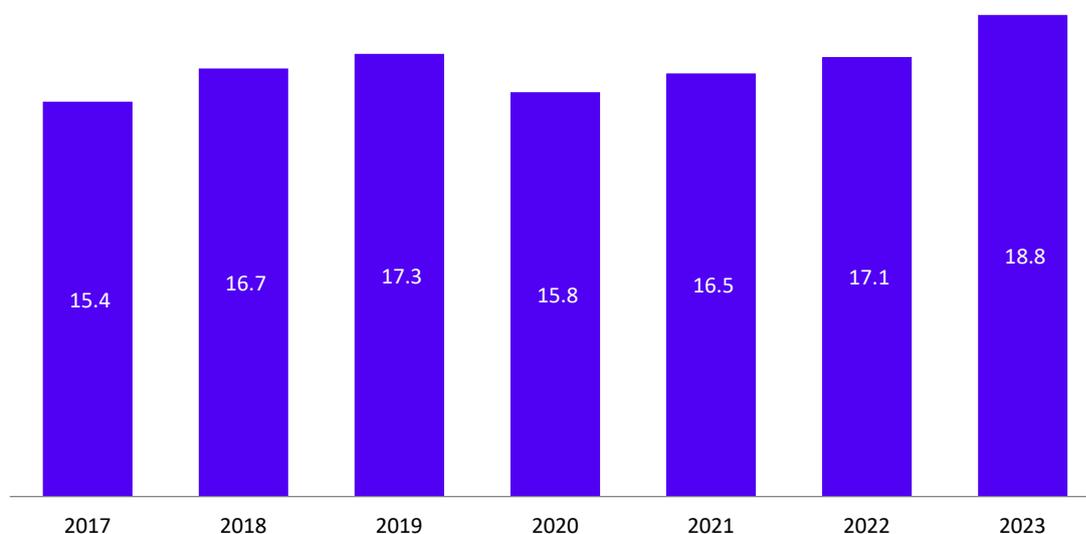


Source: Ofcom/broadcasters.

BBC ALBA increased spend on first-run content

BBC ALBA, the Gaelic-language channel run in partnership between MG ALBA and the BBC, spent £18.8m on first-run programming in 2023, an increase of £1.6m compared to 2022. This increase was driven by the scheduling and broadcasting dates of the programmes on BBC ALBA; the channel broadcast more high-value programmes in 2023 than in 2022. These included drama and comedy programmes, which are the most expensive types of programmes that it funds. BBC ALBA broadcast 650 hours of first-run content in 2023, also an increase on 2022 (592 hours).

Figure 19: BBC ALBA spend on first-run UK-originated content: 2017-2023 (£m)



Source: Ofcom/broadcasters.

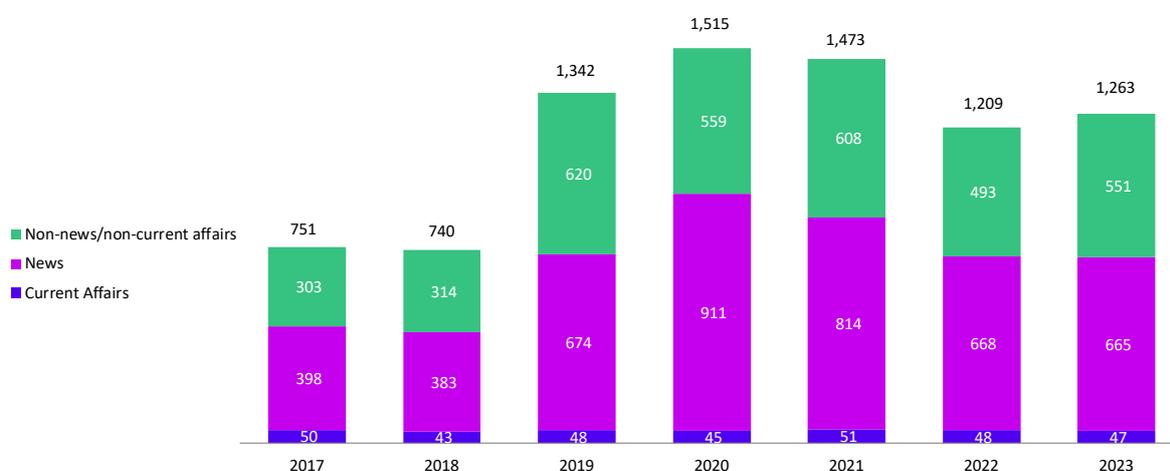
First-run BBC output in Scotland rose by 5% to 1,263 hours

The largest increase in hours by the BBC was for non-news/non-current affairs, which rose by 58 hours to 551 hours (12.9%).

BBC Scotland’s programme hours have fluctuated in past years. Non-news/non-current affairs output significantly increased in 2019 due to BBC Scotland’s first year of launch, and levels of output rose further in 2020 due to additional Covid-related programmes, which ended in 2022. More modest increases in 2023 included new programmes *Ballers: Ball or Nothing* and *Island Crossings*.

Overall, news content makes up the largest amount of the BBC’s output for Scotland, comprising 53% of first-run hours. The hours of news content have held steady at pre-Covid levels (665 hours in 2023, compared to 674 hours in 2019) following their expansion during the pandemic.

Figure 20: BBC hours of first-run UK-originated content for Scotland, by genre: 2017-2023

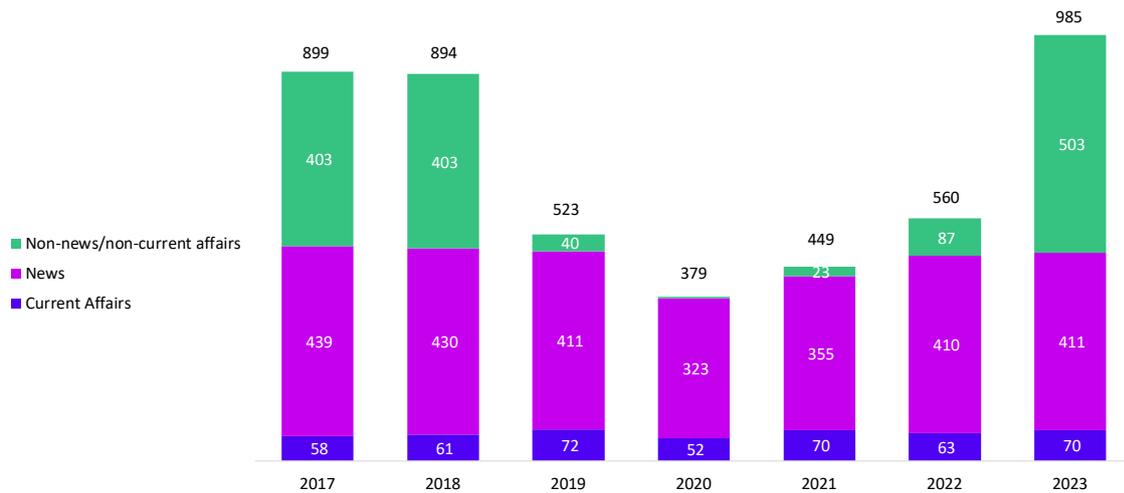


Source: Ofcom/broadcasters.

STV hours of first-run content for Scotland grew year on year, with 985 hours of programme output

The overall increase in hours was driven by non-news/non-current affairs programming, which grew by 416 hours to reach 503 hours (up 479%) in 2023. This rise was due to a full year of the new overnight information programme *Night Vision*, introduced in November 2022. News hours broadcast by STV, which comprise 42% of the total output, stayed flat at 411 hours (410 in 2022).

Figure 21: STV hours of first-run UK-originated content for Scotland, by genre: 2017-2023



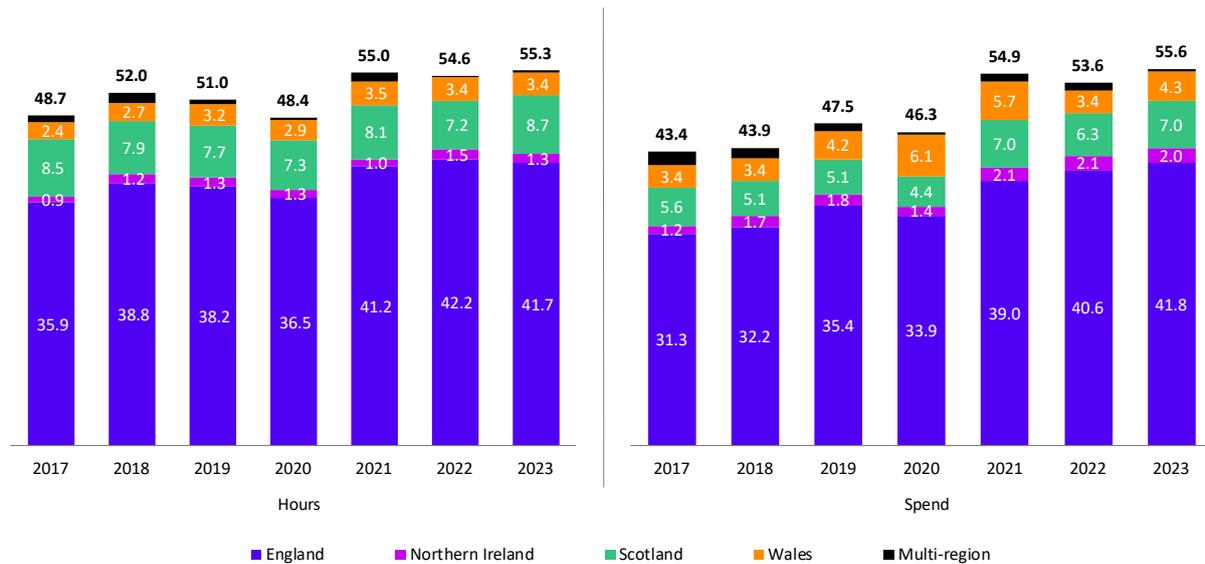
Source: Ofcom/broadcasters.

Network content produced in Scotland

Public service broadcasters must make programmes in a range of places around the UK for broadcast 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 attributable to areas 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 England.

Across all the PSBs in 2023, 7.0% of qualifying first-run network spend was allocated to programmes qualifying as Scotland productions, and 8.7% of hours. Both increased compared to 2022, and were driven by proportional increases from both the BBC and Channel 4.

Figure 22: Proportion of qualifying network hours and spend outside London, all PSBs combined: 2017-2023 (%)



Source: Ofcom/broadcasters.

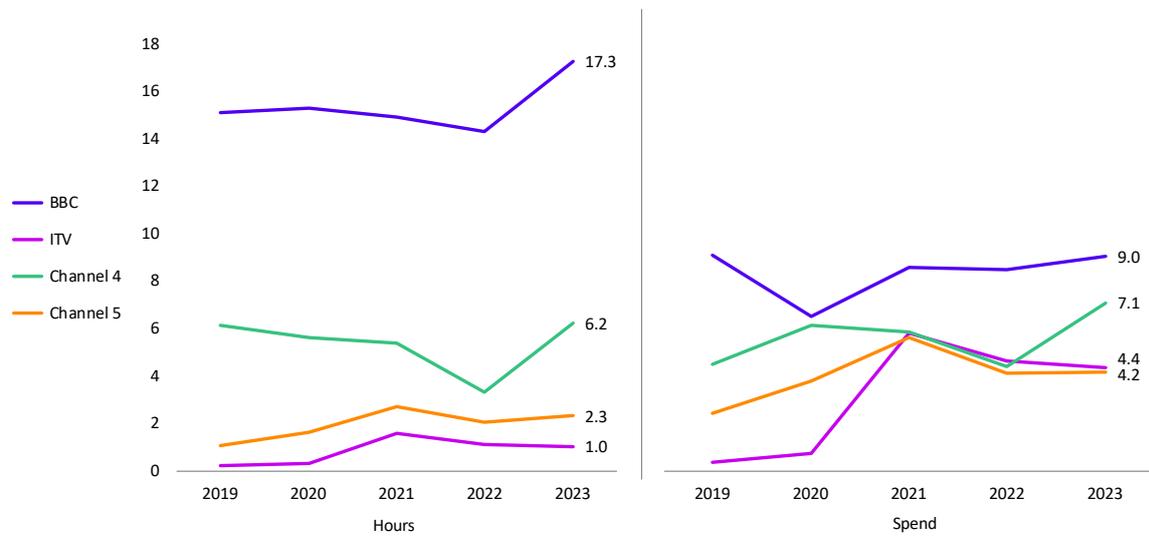
The amount of network content made in Scotland stayed level in 2023, although proportionally, spend increased

The BBC, which accounts for the majority of qualifying network content made in Scotland, maintained similar levels of hours and spend for productions made in Scotland between 2022 and 2023. However, Scottish hours rose proportionally, as a result of lower spend in the English regions. The proportion of hours rose by 3 percentage points to 17.3% in 2023, and the proportion of spend rose by 0.6 percentage points to 9.0%.

BBC network programmes produced in Scotland in 2023 were across a broad range of genres, including drama (e.g. the second series of *Vigil*), factual entertainment (e.g. the long-running *Money for Nothing*) and children’s (e.g. the RTS Scotland award-winning *Ranger Hamza’s Eco Quest*).

ITV’s proportions of spend and hours made in Scotland reduced by a small amount. Meanwhile, at 7.1%, Channel 4’s proportion of spend was the highest level on record in 2023, with programmes such as drama series *Screw* and factual entertainment programme *Tool Club* contributing to the figure.

Figure 23: Proportion of qualifying network production in Scotland, by PSB: 2017-2023 (%)



Source: Ofcom/broadcasters.

Radio and audio

Market developments

Clyde 1 celebrates its 50-year anniversary

Scotland's first commercial radio station, Clyde 1, celebrated its 50th birthday in December 2023. The station debuted at 10:30pm on Hogmanay in 1973, broadcasting from studios at Anderston in Glasgow. The station now broadcasts from studios in Clydebank on FM, DAB and online across Glasgow and West Central Scotland.

Clyde 1 marked this anniversary with a concert at Glasgow's OVO Hydro on 31 May 2024. The celebration featured a line-up of artists including Emile Sandé, Tom Walker and Amy Macdonald joining the Clyde 1 presenters. In the Radio Academy Audio and Radio Industry Awards (ARIAS) 2024, Clyde 1 won a silver award for Best Coverage of an Event, winning this for their '*Clyde 1 - the first 50 years*' event. This follows previous successes at the awards, with the station winning the John Myers Station of the Year Award in both 2022 and 2023, making Clyde 1 the first station to win this award back-to-back in 30 years.

Community Radio Fund

The Community Radio Fund supports the costs of running Ofcom-licensed community radio stations in the UK.¹³ 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 2023-24 rounds of awards, £15,000 was awarded to Radio Saltire SCIO in East Lothian for a volunteer support worker, and £16,000 was awarded to Nevis Radio in Fort William for a sales and fundraising co-ordinator.

Small-scale DAB

Small-scale DAB (SSDAB) sends audio from several different radio stations on one frequency, known as a multiplex. SSDAB differs from DAB as it only broadcasts to small areas, such as a particular town or community. Some of the benefits of SSDAB are its affordability and local reach. By broadcasting to smaller areas, SSDAB allows radio stations to tailor their content to local audiences, while still being able to provide audiences with extra choice through expanded station options.

Ofcom is responsible for awarding small-scale DAB multiplex licences. For Scotland, Ofcom has so far awarded licences covering Berwickshire and North Roxborough, East Fife, Inverclyde, Stirling and Falkirk, Glasgow, Edinburgh and Aberdeen. Of those awarded licences, Glasgow, Edinburgh, Stirling and Falkirk, and most recently Aberdeen, have all launched their SSDAB multiplexes. Five further licences for Scotland were advertised by Ofcom earlier this year.

¹³ The Community Radio Fund is administered by Ofcom on behalf of the DCMS, which provides the fund.

Success in Scotland’s podcast sector

Scotland’s podcast industry has grown considerably in past years, with new Scottish podcasts spanning a wide range of genres including sports, current affairs, history and comedy. Notably, a Scottish podcast won an award in the ARIAS 2024: BBC Scotland’s true crime podcast *Shiny Bob: The Devil’s Advocate* won a gold award for Best News Coverage. Another Scottish true crime podcast, *Murder in the Granite City*, produced by The Scottish Sun, won Podcast of the Year at the 2023 Scotland Professional Publishers Association Awards.

Radio availability and coverage

Radio services in Scotland are provided by the BBC and by the commercial and community radio sectors. The BBC’s UK-wide stations are available throughout Scotland on analogue and DAB radio. In addition, the BBC operates two Scotland-wide services, BBC Radio Scotland¹⁴ and BBC Radio nan Gàidheal, which are broadcast on AM/FM as well as on DAB.

As of March 2024, there were two national commercial stations, 29 local commercial stations (a decline of five following the closure of some AM medium wave services) and 28 community radio stations broadcasting on AM/FM in Scotland. Fifty-six national commercial and 65 local commercial services broadcast on DAB in Scotland, an overall increase of ten DAB services since last year.

Figure 24: Number of commercial and community radio services in Scotland, by broadcast technology: March 2024

	AM/FM	DAB
UK-wide commercial	2	56
Local commercial	29	65
Community	28	N/A

Source: Ofcom. Note: these include all commercially-licensed services carried on each multiplex, so a service may be counted more than once. Community radio licences are analogue licences, but holders of these licences may also hold a commercial DSP (digital sound programme) licence to simulcast on a DAB multiplex. The data 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.

¹⁴ BBC Radio Scotland includes local content opts for parts of Scotland at certain times of the day e.g. BBC Radio Shetland.

Figure 25: DAB coverage as of March 2024

		BBC	Commercial			Small-scale
			Digital One	Sound Digital	Local DAB	
UK	Homes	97.4%	91.7%	82.6%	92.0%	25.6%
	Major roads	87.4%	80.2%	72.6%	76.8%	NM
England	Homes	98.4%	94.8%	86.7%	93.4%	25.2%
	Major roads	94.5%	93.9%	89.8%	87.4%	NM
Northern Ireland	Homes	87.3%	85.4%	56.8%	87.5%	32.1%
	Major roads	79.3%	86.9%	55.0%	87.8%	NM
Scotland	Homes	95.3%	81.7%	69.0%	85.4%	32.1%
	Major roads	69.1%	45.5%	33.6%	45.6%	NM
Wales	Homes	92.2%	67.5%	56.9%	82.6%	17.6%
	Major roads	78.1%	53.3%	37.7%	60.9%	NM

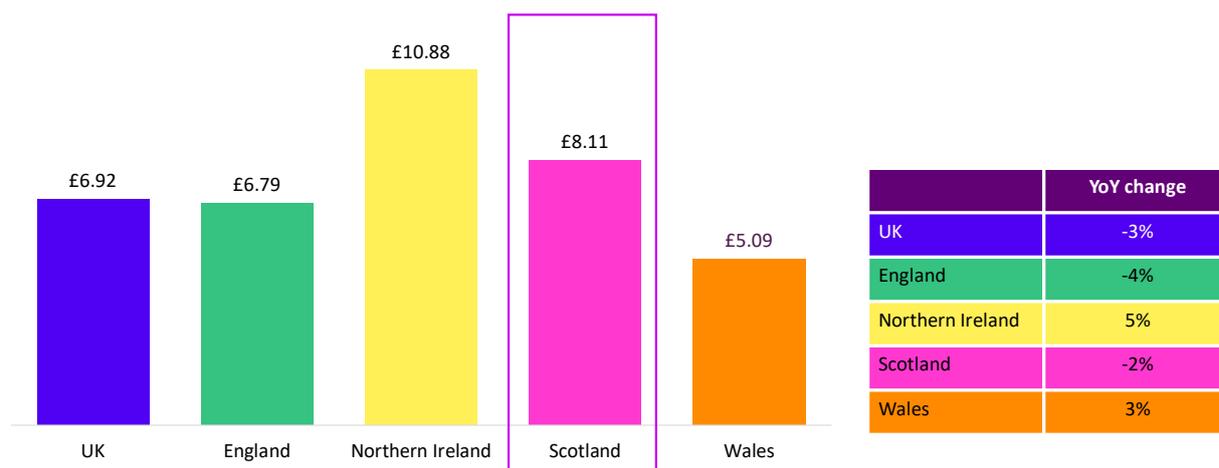
Source: Arqiva, BBC, Ofcom. Note: Coverage of small-scale DAB is measured on a homes-only basis. 'NM' denotes levels are not measured.

Commercial radio revenues

Per-capita commercial radio revenues fell in Scotland between 2022 and 2023

Per-capita commercial local radio revenues in Scotland fell by 2% between 2022 and 2023. Despite this, at £8.11 per person, per-capita revenues in Scotland continued to be higher than the UK average, and higher than England and Wales.

Figure 26: Per-capita commercial radio revenues, by nation: 2023 (£)



Source: Ofcom, broadcaster returns. These figures relate only to total relevant turnover reported against AL licences (local analogue commercial) and in relation to advertising include both local and national advertising revenues, i.e., not only the revenues which relate to adverts aimed at the specific nation. As mid-year 2023 population estimates were not available at the time of publication, 2022 mid-year population data has been used for both 2022 and 2023.

Live radio listening in Scotland

Where our data comes from

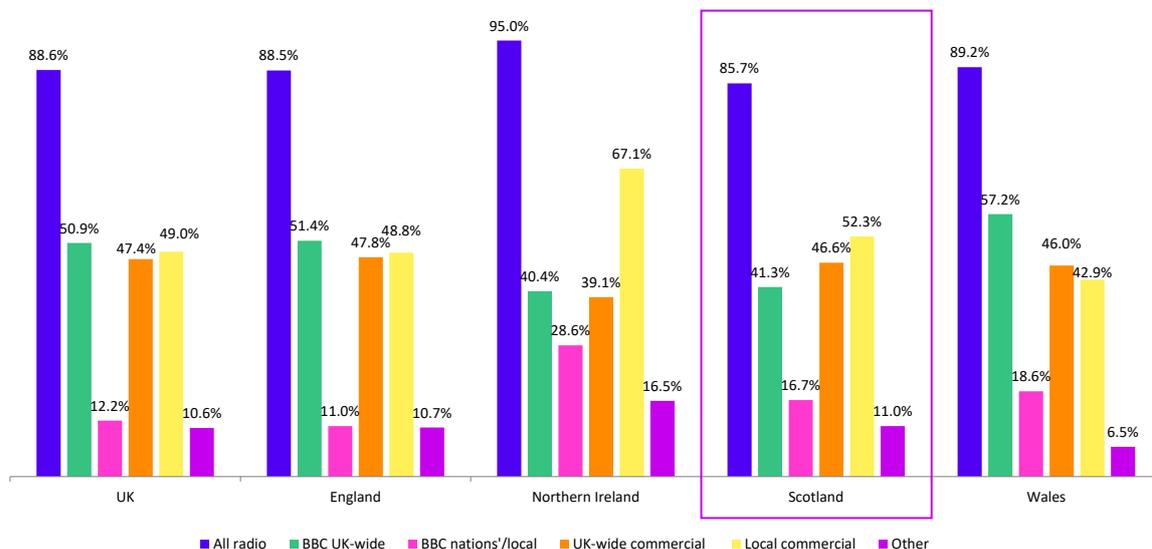
Our figures for reach and share of listening to different audio types come from IPA TouchPoints, and figures on live radio listening come from RAJAR. Both sources refer to adults as those aged 15+ so we have used this terminology here.

Fewer people are tuning in for longer: 86% of adults listen to live radio across Scotland, for an average of 19.4 hours each week

Figure 27 shows the reach of the different radio sectors and how they vary by nation. Eighty-six per cent (85.7%) of people aged 15+ in Scotland (4 million) listen to the radio each week, marginally lower than in the rest of the UK. However, total listening increased from 74.2 million to 77.4 million hours, meaning that fewer people are tuning in, but for longer each week.

Over half of people (52.3%) listened to local commercial stations each week in Q1 2024, a higher proportion than the UK overall (49.0%), while less than a fifth (16.7%) listened to BBC nations'/ local stations. This was higher than the UK average of 12.2% but much lower than in Northern Ireland, where three in ten adults listen to BBC Radio Ulster each week.

Figure 27: Weekly reach of radio, by sector and nation: Q1 2024

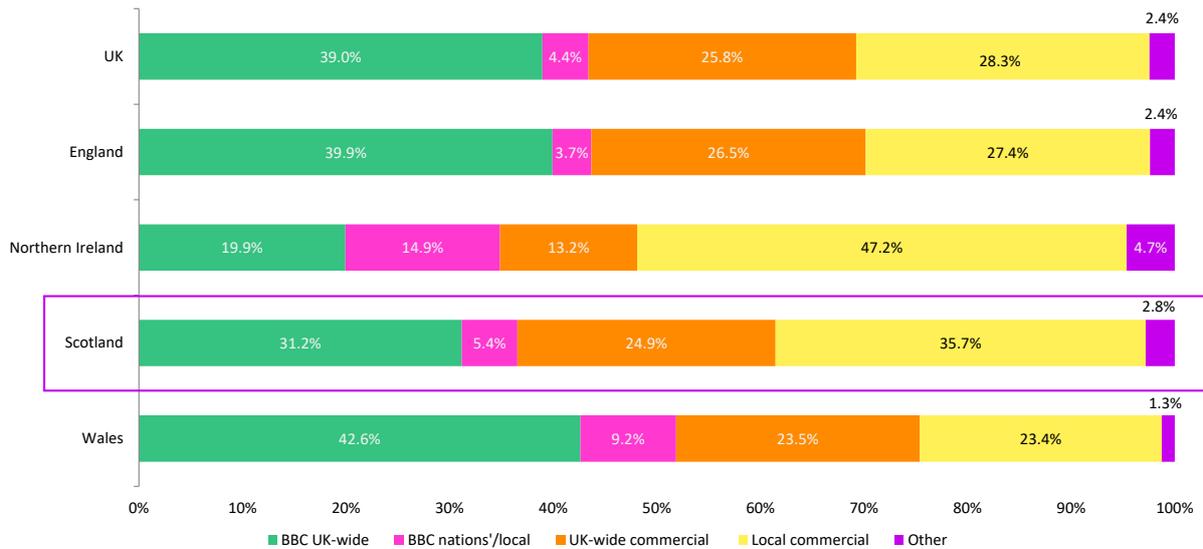


Source: RAJAR; All Radio TSA, BBC Radio Ulster TSA, BBC Radio Scotland TSA, BBC Radio Wales TSA, BBC Local Radio in England TSA. Weight: Automatic weighting.

Commercial radio listening continues to increase year on year, accounting for more hours in Scotland than across the UK

Commercial radio accounted for the majority (60.6%) of total radio listening across Scotland in Q1 2024, 3.7 percentage points higher than a year ago, and 6.7 higher than across the UK as a whole (53.9%). 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 28).

Figure 28: Share of radio listening, by sector and nation: Q1 2024



Source: RAJAR Q1 2024; All Radio TSA, BBC Radio Ulster TSA, BBC Radio Scotland TSA, BBC Radio Wales TSA, BBC Local Radio in England TSA. Automatic weighting.

Drilling down to a regional and station level, we see some variation in what people are listening to in different areas. Across the Central Belt, Bauer’s Clyde 1 and Forth 1 take the number one and number three spots respectively. Both stations are part of Bauer’s Hits Radio Network and share some simulcast content, but retain local news, traffic and travel, and some programming – most notably breakfast shows with George Bowie and Cassi on Clyde 1 and Boogie, Arlene and Marty on Forth 1. BBC UK-wide stations featured much more prominently in the North of Scotland.

Figure 29: Top five stations / networks in selected Scotland TSAs, ranked by market share: Q1 2024

Area	Rank	Station	Market share %	Broadcaster
Across Scotland	1	BBC Radio 2	11.3	BBC
	2	Clyde 1	8.9	Bauer
	3	BBC Radio 4	6.4	BBC
	4	Greatest Hits Radio	6.2	Bauer
	5	BBC Radio Scotland	5.8	BBC
Central Belt	1	Clyde 1	13.3	Bauer
	2	BBC Radio 2	10.3	BBC
	3	Forth 1	6.9	Bauer
	4	Smooth Radio	6.1	Global
	5	BBC Radio 4	5.6	BBC
North of Scotland	1	MFR	13.8	Bauer
	2	BBC Radio 2	13.4	BBC
	3	BBC Radio 4	9.4	BBC
	4	BBC Radio 1	9.2	BBC
	5	BBC Radio Scotland	7.9	BBC

Source: RAJAR; BBC Radio Scotland TSA; Capital Scotland TSA; Greatest Hits Radio North Scotland TSA (Inverness); Automatic weighting.

Figure 30: Map of selected Scotland Total Survey Areas (TSAs)



Source: Mediatel.

A year after re-introducing a new local network schedule, Capital and Heart are reaching more listeners in Scotland

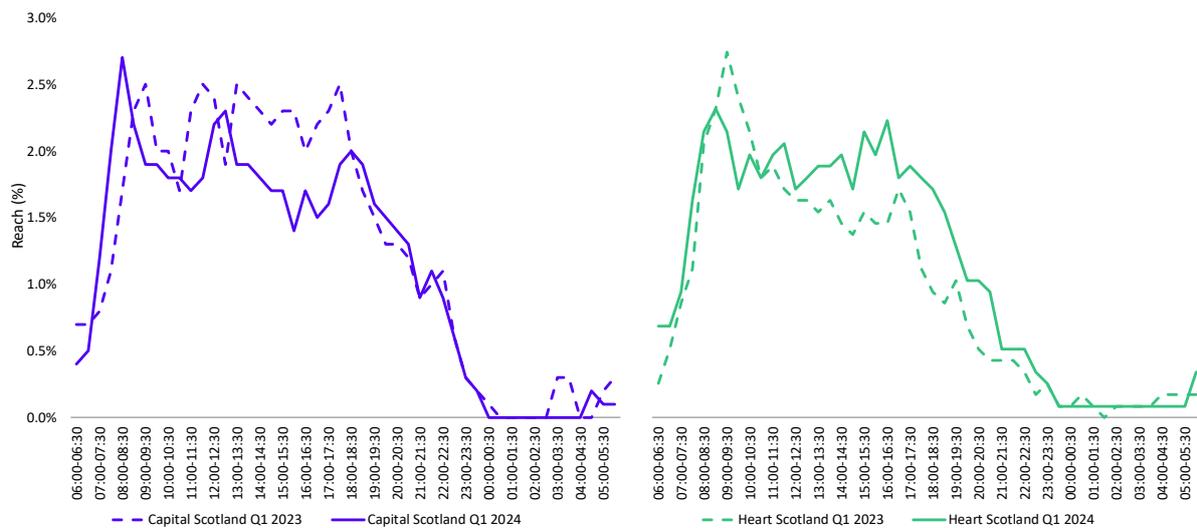
In May 2023 Global re-introduced a [local network schedule for Heart Scotland and Capital Scotland](#), with both stations broadcasting full daytime schedules and weekend programming live from Global's broadcast centre on West Regent Street in Glasgow. One year on, we can see if and how listening to these stations has changed since these new schedules were implemented.

In Q1 2024, Capital Scotland's reach was up by 0.2 percentage points; from Q1 2023 to 13.2%. This was a greater increase than for Capital's UK network (which was up by 0.1pp). However, listening to Capital Scotland decreased by 15.7% from 1.41 million hours to 1.19 million hours in the same period, indicating that more people across the Central Belt are tuning in, but for a shorter time each week. Heart Scotland's reach and hours both increased, from 12.1% to 13.5% and from 1.52 million to 1.71 million hours respectively, in line with Heart's performance across the UK as a whole.¹⁵

The reach of both stations follows a similar pattern across the day as before, but there are certain timeslots where reach has increased in the past year (as indicated in the charts below). For Heart Scotland, reach was higher from mid-morning onwards in Q1 2024 compared to Q1 2023, while Capital Scotland had higher reach during the early breakfast slot but lower levels in the afternoon.

¹⁵ RAJAR Q1 2024 vs Q1 2023; Individual Station TSAs; Automatic weighting.

Figure 31: Reach across the day, Capital Scotland and Heart Scotland, Q1 2023 vs Q1 2024



Source: RAJAR; Individual Station TSAs; Automatic weighting; Mon-Fri 6am-6am.

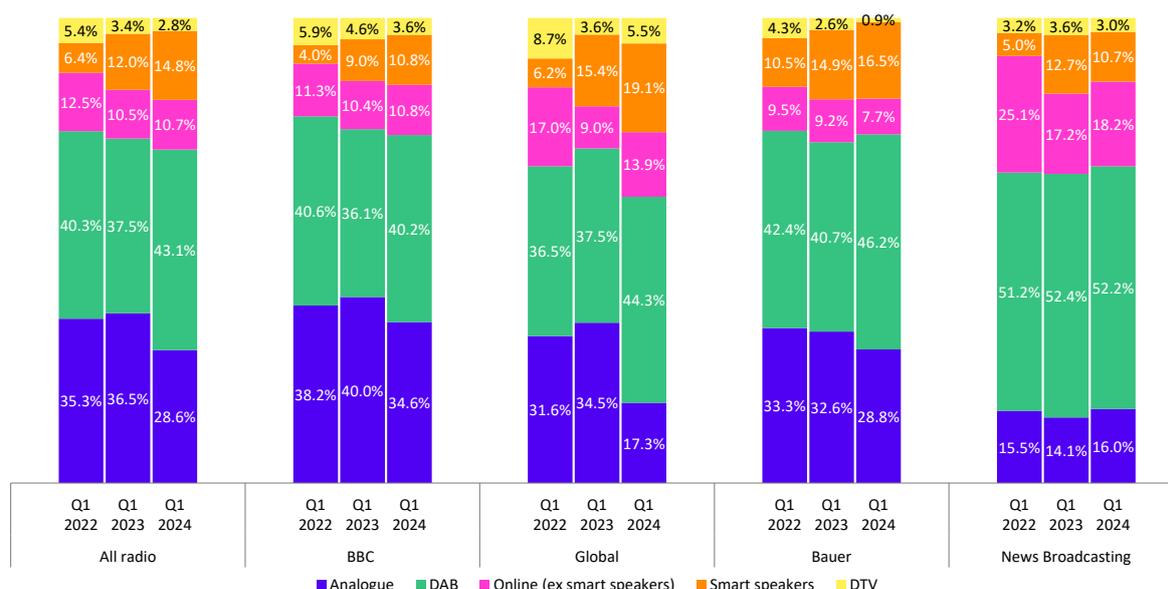
Online listening continues to increase in Scotland, with smart speakers driving growth

The way people listen to radio is shifting. The number of hours spent listening on AM/FM has declined by a fifth each year for the past couple of years, and listening in this way now accounts for 28.6% of all hours. But listening through a radio set is still important; DAB hours have increased by a fifth over the past year, and this platform now accounts for 43.1% of overall hours.

The move to online listening is also continuing, with smart speakers, smartphones and other internet-enabled devices now accounting for over a quarter (25.5%) of all radio listening in Scotland: a five percentage point increase year on year. Listening via smart speakers, as opposed to through apps or browsers, accounts for 14.8% of all listening.

Looking at specific broadcasters, Global’s online listening increased to a third of all Global station hours in Scotland in Q1 2024 (33%), while Bauer and BBC shared a similar pattern of steady growth in their online and DAB share of listening. Listening via smart speakers is higher for the largest commercial broadcasters (Global at 19.1% and Bauer at 16.5%) and lower for the BBC, at 10.8%.

Figure 32: Share of radio listening by platform and broadcast group: Scotland



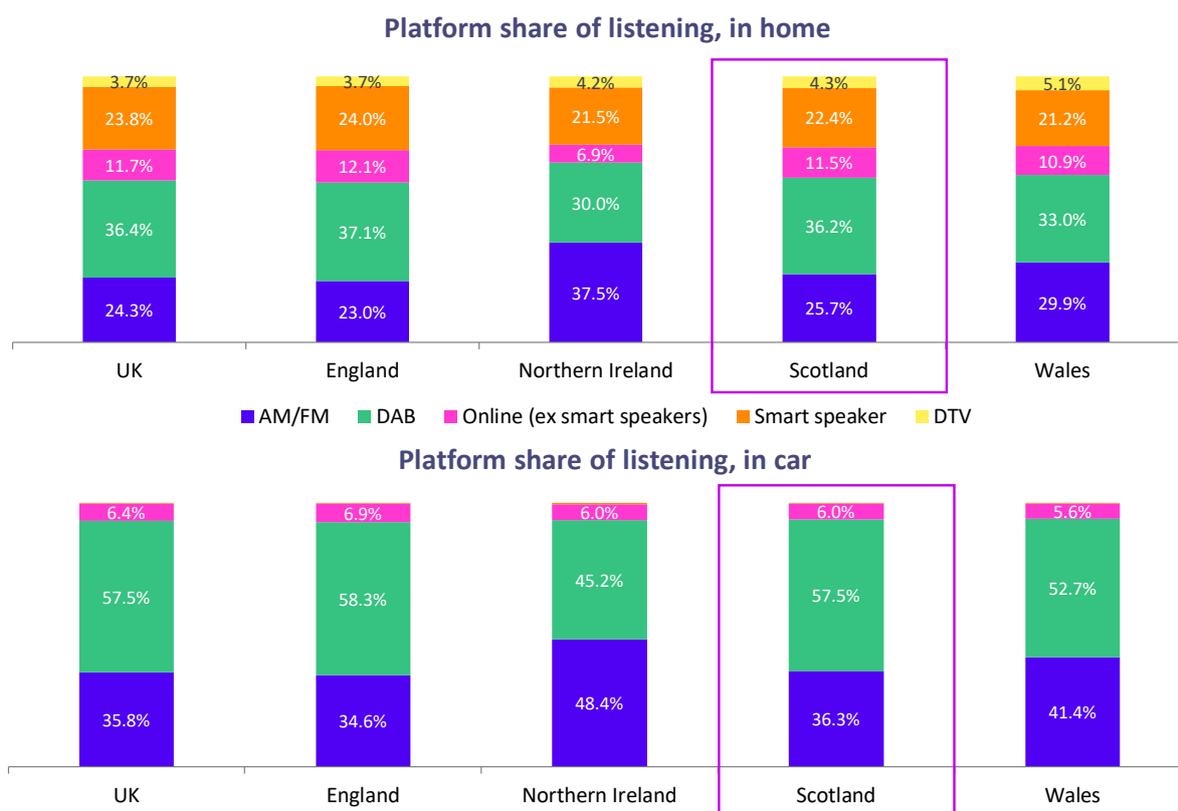
Source: RAJAR, BBC Radio Scotland TSA.

DAB now accounts for the majority of in-car radio listening in Scotland

The location of listeners also affects what platforms they use to listen. In cars, the majority of listening is now via DAB (57.5%) – up from 49% a year ago – with 36.3% to AM/FM and 6% online. These figures are broadly in line with the average across the UK and reflect the number of new vehicles on the road as well as the increased availability and choice of DAB services.

With more devices and ways of listening to the radio at home, including fixed internet connections and in-home WiFi, it is not surprising that the DAB and AM/FM figures have dropped to 36.2% and 25.7% respectively, with smart speakers and other online devices accounting for just over a third (33.9%) of in-home radio listening in Scotland.

Figure 33: Platform share of in-home and in-car listening, by nation: Q1 2024



Source: RAJAR Q1 2024; All Radio TSA; BBC Local Radio in England TSA; BBC Radio Ulster TSA, BBC Radio Scotland TSA; BBC Radio Wales TSA; six-month weighting.

Online listening in Scotland

Just under half of all households in Scotland have a smart speaker

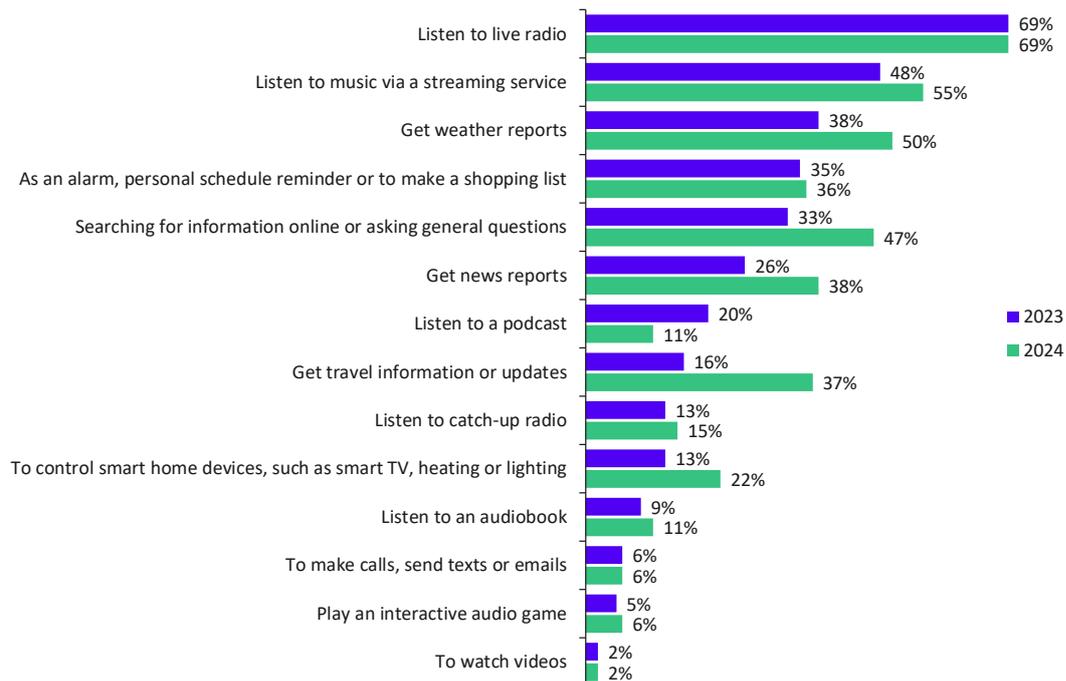
Just under half of households (47%) in Scotland have a smart speaker, a 6pp decline year on year.¹⁶ Amazon continues to be the most-used brand; just over four in five homes (82%) with smart speakers have an Amazon Echo, followed by the Google Home/ Google Nest at 11%. The most usual place to have a smart speaker is the living room, with two-thirds of all smart speaker owners having one here (66%), followed by the kitchen (40%) and the bedroom (38%).¹⁷

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, 12pp higher than the UK average of 57%, and over half (55%) used it for listening to music via a music streaming service, a 7pp increase year on year. The next most common uses of smart speakers were for getting weather reports (50%), again an increase on last year's figure of 38%, and searching for information (47%).

¹⁶ Ofcom Technology Tracker 2024; QS1. Do you or does anyone in your household have a smart speaker or smart display... Base: All respondents (UK unweighted base: 4,000, Scotland unweighted base: 502).

¹⁷ Ofcom Technology Tracker 2024; Base: Where have a smart speaker or smart display (UK unweighted base: 1,649, Scotland weighted base: 227).

Figure 34: Smart speaker activities in Scotland: 2024 vs 2023

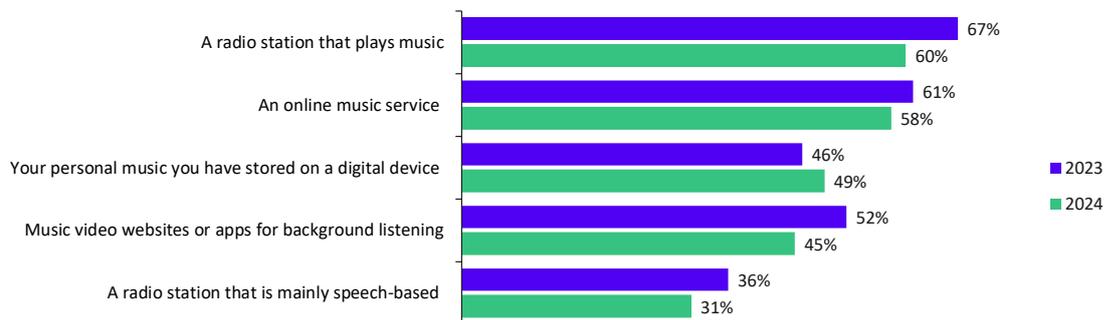


Source: Ofcom Technology Tracker 2024. Q57. Thinking of your household's smart speaker, which of the following functions do you personally use your smart speaker for? Base: Where personally use a smart speaker or smart display (Scotland unweighted base 2023: 227. Scotland unweighted base 2024: 196).

Music radio still reaches more people in Scotland than music streaming – but only just

Looking more broadly at all forms of audio across devices, online music services (such as Spotify, Apple and Amazon) now have similar levels of weekly reach among adults in Scotland as music radio. Six in ten adults in Scotland listen to music radio (60%) while 58% listen to an online music service at least once a week.

Figure 35: Top five weekly audio activities, adults age 15+ in Scotland, by reach: 2024 vs 2023

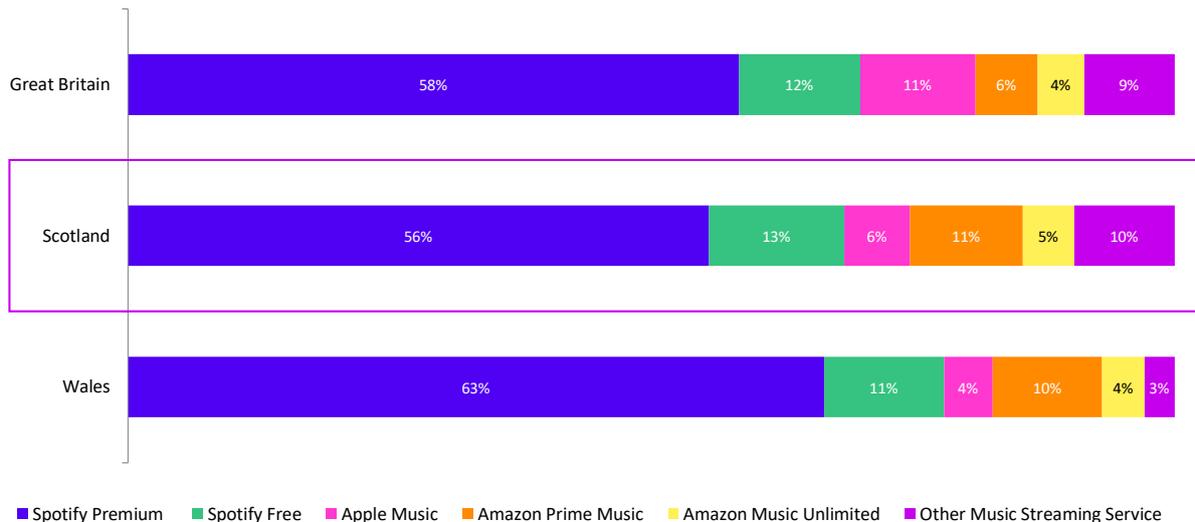


Source: Ofcom Audio Survey. Q1: How often, if at all, do you listen to any of the following? Base: All adult respondents (Scotland weighted based 2023: 188. Scotland weighted based 2024: 278) NET: weekly.

Spotify has the largest share of time spent streaming music

Over two-thirds of time spent streaming music is to Spotify (69%) and the majority of that is to Spotify Premium (56% of total time spent). Apple Music's proportion of music streaming time for adults aged 15+ in Scotland was almost half the average for Great Britain as a whole (6% vs 11%) while Amazon's share, in particular listening to Amazon Prime Music, was higher in Scotland than the GB average (16% vs 10%). A tenth of music streaming time was spent on other platforms, including services such as Soundcloud, TuneIn, Deezer and Tidal, as well as the YouTube main site.

Figure 36: Share of time spent music streaming by platform: adults in GB, Scotland and Wales

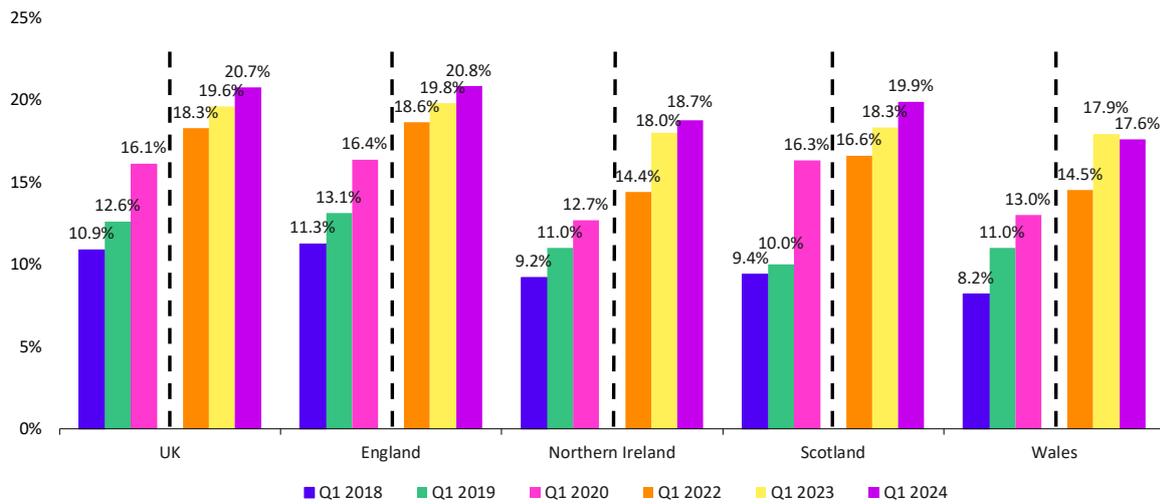


Source: IPA TouchPoints Superhub 2023/24; Adults 15+.

The reach of podcasts continues to grow slowly but steadily, with a fifth of adults in Scotland now listening to one each week

Podcasts are slowly but surely becoming part of the audio diet, with approximately one in five (19.9%) adults in Scotland listening to them once a week in Q1 2024. This is fractionally lower than the UK reach figure of 20.7%, but still more than double the 2018 figure (9.4%) and 1.6 percentage points higher than a year ago. With more crossover between podcasts and traditional media (e.g. podcasts supplementing TV viewing for specific programmes, and in some cases even being broadcast on TV), we can expect to see this overall trend continue over the next couple of years. Scottish podcasts *Holyrood Sources* and *The Terrace* are examples of shows embracing video content across social media and YouTube to further build their audience.

Figure 37: Weekly reach of podcast listeners, by nation: 2018-2024



Source: RAJAR; dotted lines indicate suspension of fieldwork due to the Covid-19 lockdowns. This led to subsequent changes in methodology, so comparison with previous quarters should be made with caution.