Scottish Parliament Information Centre
Ionad Fiosrachaidh Pàrlamaid na h-Alba

Europe, External Affairs and Culture Committee
Tuesday 10 November 2026
10th Meeting, 2026 (Session 7)

Broadcasting and news

1. The Committee is undertaking a short piece of work over three weeks covering the broadcasting sector and news in Scotland, including local news provision. This week the committee will take evidence from two panels: the first with the National Union of Journalists (NUJ), the Broadcasting, Entertainment, Communications and Theatre Union (BECTU), and Professor Catherine Happer, Director of the Glasgow University Media Group; and the second with Ofcom.

2. The Committee may wish to explore the trends, challenges and opportunities facing broadcasters, as well as the implications for consumers/citizens of the changing broadcast markets.

3. These issues were also explored by the Session 6 Constitution, Europe, External Affairs and Culture Committee's inquiry in January of this year on Scottish Broadcasting and the BBC Charter renewal. Indeed, the Committee will be taking evidence from a similar set of witnesses as the predecessor Committee.

4. Policy on broadcasting and the regulation of online content and activities are reserved. However, there is an interaction between broadcasting and areas of devolved policy, such as support for the screen sector and print media.

Session 6 Constitution, Europe, External Affairs and Culture Committee inquiry on Scottish Broadcasting

5. The predecessor Committee undertook an inquiry into Scottish Broadcasting in early 2026.

6. This inquiry explored the "health and future vitality of Scottish broadcasting" as well as informing that Committee's consideration of the renewal of the BBC Charter. It also considered news provision.

7. The Constitution, Europe, External Affairs and Culture Committee's report was published on 20 March 2026, just prior to the close of Session 6. Recommendations were aimed at the Scottish Government, Screen Scotland, Ofcom, the BBC and the UK Government. Part 2 of the report formed that Committee's contribution to the Department of Culture, Media and Sport's consultation on the BBC Charter renewal. No responses have been received from any organisation addressing those recommendations. The conclusions and recommendations are reproduced in the annexe to this paper.

8. Broadly speaking, the report said that public service broadcasting remains vital, but the BBC and the wider regulatory system must become more devolved, more

representative of Scotland, better aligned with technological change, and supported by a sustainable long-term funding settlement for the BBC.

Submissions from witnesses

9. Each of the witnesses for this week contributed to the Constitution, Europe, External Affairs and Culture Committee's inquiry, both providing written evidence and appearing as witnesses.

National Union of Journalists

10. The NUJ's submission argued that the BBC remains one of the UK's most trusted news sources and is particularly important within the changing media environment.

11. NUJ supported the continuation of the licence fee and called for increased and more stable funding after years of real-terms cuts. According to the submission, reductions in funding have led to job losses, diminished training and pressure on journalism across the UK, including Scotland.

12. The submission stated:

> "The NUJ acknowledges that the BBC's universal funding is a privilege and comes with a responsibility to serve all audiences. While the BBC reaches 95% of the UK adult population each month, nations and regions have been underserved and underrepresented for years. The BBC should improve on- and off-screen diversity initiatives, offering training programmes and apprenticeships to people from diverse, working-class backgrounds who are traditionally denied entry to journalism."

13. NUJ expressed its opposition to the changes to STV's news output. It said, that there are low levels of competition for channel 3 licences and this means that companies with those licences have "significant power". NUJ warned of "a downwards ratchet: in years when STV and ITV face financial difficulties, they will seek to reduce their costs associated with news production, but in years when they make profits, those profits are returned to shareholders, executives and other areas – but rarely to increase their public service broadcasting provisions."

14. NUJ gave evidence on 8 January 2026. In this meeting, Nick McGowan-Lowe discussed the issues raised in the NUJ's submission as well as the changing market conditions both in relation to competition for advertising and the importance of news produced by PSBs competing in unregulated information spaces. Nick McGowan-Lowe also highlighted concerns around the use of AI in journalism.

Professor Catherine Happer

15. Professor Happer co-authored a submission from the Glasgow University Media Group (GUMG). She also provided the predecessor committee with a 2022 report, Scotland's Sustainable Media Future: Challenges and Opportunities.

16. The GUMG submission highlighted the "significant structural issues" facing broadcasting in Scotland within an "increasingly globalised media system in which Scottish content competes with content from all over the world". She highlighted global streaming platforms such as Netflix which "produce programming on massive budgets with significant cross-media advertising campaigns" and YouTube. GUMG stated that these changes to the market "pose challenges in respect of capturing and holding audiences, especially young audiences." GUMG stated:

> "In this context where the role, relevance and status of domestically produced broadcasting is increasingly questioned, not all genres are impacted to the same degree or in the same way - for example, in entertainment and drama, increasing competition poses a major threat in respect of dwindling audiences for local content. In news and current affairs, whilst there are issues of trust … broadcast news content continues to reach significant audiences, albeit much reduced if viewed historically."

17. GUMG highlighted the following issues:

- Decline in trust of broadcast news from BBC Scotland and other professional news providers with a perception of a "political agenda of professional news which serves those in power and does not speak to the interests and priorities of normal people"

- Fragmented audiences with lower income groups and young people particularly losing faith in broadcast news. The submission warned that there is a risk of "a two tier model for broadcast news: where those who are in the higher income groups and/or more highly educated are well served, and the under-privileged go elsewhere for news and often to places where disinformation thrives".

- Increase in popularity of social media news influencers, particularly among younger audiences.

- Lack of regulation of 'news alternatives'.

- AI generated content.

18. In relation to PSBs, the GUMG argued that "license fee based on the principle of universality has been undermined in the digital era" and alternatives should be considered. It also discussed the need for greater visibility of PSB content on the electronic programme guide, particularly highlighting the lack of prominence of the BBC Scotland channel. The submission argued for greater autonomy for BBC Scotland and a need to rebuild trust. It said:

> "The key point is that news has to change: to include a greater diversity of voices, a need to counter the agenda of politicians, and to move to more accessible forms of language and presentation of news. It is not enough to simply direct people back to mainstream news for 'truth' or 'accurate information'. Audiences must believe news is serving their interests. Our research shows however that audiences still turn to broadcast news in times

> of crisis – for example, millions tuning into the BBC during the pandemic and there is much to be learned from the ways in which both mainstream audiences and those most disconnected were reached during this time."

19. Professor Happer gave evidence on 8 January 2026. She told the committee, that broadcasting is facing a structural crisis driven by changes in how audiences consume media, particularly news. She highlighted that people, especially younger audiences, increasingly access news through social media rather than traditional broadcasting. This has created challenges for PSBs' reach, visibility and funding. Echoing her submission, Professor Happer argued that BBC Scotland should have greater autonomy. She linked this to building trust in the BBC in Scotland.

BECTU

20. BECTU's submission highlighted the importance of PSBs, particularly the BBC and STV, to support the production sector in Scotland. However, it stated, "light touch regulation and commissioning practices do not offer sufficient protection to ensure Scottish based crews are employed as much as they should be."

21. BECTU noted the "increase in streaming, video on demand and social media". It stated:

> "While the centralisation and consolidation of news output at both the BBC and STV are largely attributed to these changes in viewing habits by the broadcasters, they will nonetheless significantly reduce plurality and local relevance across Scotland. This brings with it a resultant loss in regional identity and local employment opportunities."

22. BECTU's submission highlighted BectuVision, a programme of training and skills development. It also highlighted issues to do with Fair Work in the industry which has a high number of freelancers, saying that "unrealistic commissioning tariffs and intense budgetary pressures result in excessively long hours and poor employment practices being the norm for too many."

23. BECTU gave evidence to the Committee on 15 January 2026. Paul McManus from BECTU said that the BBC "has had many years of cuts and poor licence fee settlements, and on-going, year-on-year redundancies" and called for a "realistic licence fee settlement that allows the BBC to expand its programme making". He argued that "it is crucial for the culture and democracy of Scotland that we have a strong, independent, impartial BBC that is free from political interference and that the services that it provides are universal to all".

24. In relation to broadcast quotas[1]. Mr McManus said "we want Scotland to get its fair share of work, and we want a fair share of work to originate from within

[1] Different PSBs have different obligations on the percentage of hours/spend of network television are made out of London. BBC has Scotland specific quotas; Channel 4 has a quota for out of England productions (9%). The different quotas reflect the different funding and governance arrangements of the PSBs, the BBC and Channel 4, which are publicly owned, have more detailed and/or challenging targets than Channel 3 and Channel 5. Ofcom's website has more details.

Scotland". He suggested that there is complexity around this issue for example linked to skills development and training. Mr McManus stated;

> "It is too simplistic to say that it is a problem that a company has come up from London, because you might find out that the whole crew is from Scotland. Similarly, you might find that a Scotland-based company has a commission but is using people from London. Part of our role is to dig down into the detail of that and identify the specific challenges. There might be a fair quota, but we need to make sure that it is fair all the way through the process and that Scottish creatives and off-screen talent are getting the opportunity to work on or produce the programmes."

25. Later Mr McManus said BECTU "would like more thought to be given to how Ofcom quotas operate to deliver outcomes".

26. Mr McManus highlighted the importance of the BBC in supporting skills development in Scotland.

Ofcom

27. Ofcom gave evidence to the Committee during the Scottish Broadcasting inquiry on 15 January 2026; the Committee also explored the then proposed changes to STV News at that meeting.

28. Ofcom highlighted the changing media landscape and it said, "our regulation should not stifle innovation or prevent broadcasters from adapting; rather, regulation should support them so that they can continue to serve audiences in this increasingly challenging and constantly evolving environment". Cristina Nicolotti Squires also stated:

> "As far as I can tell, audiences have never had it so good. There is a huge range of content to watch on many different platforms at the time that they want and in the manner that they want, whether that is on their iPad in a hotel room or on the TV in their sitting room. However, that gives the broadcasting industry challenges, particularly in the PSB sector and in the commercial PSB sector, whose financial model is based on advertising. As the audience fragments, that creates a real challenge. The biggest challenge to the broadcasting industry in Scotland is to ensure that great content is still being made that represents people across this nation and is available on a platform that people are accessing and using."

29. Glenn Preston highlighted growth in the Screen Sectors in Scotland. He said, "local and global companies that see Scotland as a place where they can make high-quality programmes across the range of genres". He also highlighted the popularity of radio in Scotland and that commercial radio has particularly strong reach across Scotland.

30. Ofcom followed up with a submission to the Committee on 11 February 2026. This reiterated some of the points highlighted above.

31. Ofcom's submission also noted that "there have undoubtedly been challenges for production companies across the UK and Scotland is not immune to that". Ofcom stated that broadcasters are "increasingly focussing on fewer commissions with a higher impact" to meet challenges in relation to financial pressures.

32. Ofcom also discussed the regional quotas. It said "criteria currently in place are designed to support a mixed ecology and the benefits this can provide to both homegrown producers and the wider creative economy of Scotland". Ofcom said it had no plans to review these quotas.

33. Ofcom's submission discussed the BBC's commitment to represent and accurately portray different groups of society. It highlighted a recent independent thematic review of portrayal and representation in BBC content which the BBC commissioned and was published in January 2026 which, Ofcom said, "recognised that although improvements have been made in representations of the devolved nations, it needs to better consider geography when making improvements in diversity."

Key market developments

34. A number of developments have occurred in the in the broadcasting markets in Scotland in the past year.

BBC Charter renewal process

35. The BBC is constituted through a Royal Charter. The current BBC Charter began on 1 January 2017 and ends on 31 December 2027.

36. The Department for Culture Media and Sport published Britain's Story: The Next Chapter - the BBC Royal Charter Review, a Green Paper and public consultation on the charter renewal process. There is a role for the Scottish Government and Scottish Parliament in this process. The Green Paper was structured around four chapters:

- A trusted institution – how to improve public trust in the BBC
- Delivering services for the public good – how to "futureproof the BBC … enhancing its digital capabilities, providing a counterpoint to false narratives and disinformation, and ensuring it has the highest editorial standards"
- Driving growth across the UK
- Sustainable and fair funding

37. In her foreword to the Green Paper, Lisa Nandy MP, the Secretary of State for Culture Media and Sport said—

> "Our vision is for a BBC that is trusted, loved and belongs to us all, providing those shared spaces and places that have become so rare and so precious in recent decades. Sustainably funded, with a strong presence in every nation

> and region so that all of us can see ourselves reflected in our national story. A broadcaster known for its unique strengths, from the highest quality children's programmes to impartial and trusted news and documentaries, the world over."

38. A White Paper is expected to be published in 2026.

BBC cost reductions

39. The BBC is undertaking a significant cost-reduction programme intended to deliver around £500 million of savings by 2028. In June 2026, Director-General Matt Brittin announced the first phase of the programme, involving approximately 550 role reductions across the BBC's News, Nations and Content divisions and delivering around £160 million of savings by the end of the financial year. The BBC also announced reductions in commissioning expenditure and reviews of television and radio services.

40. In Scotland, the most significant development has been the BBC's decision to close the linear broadcast version of BBC Scotland in spring 2027. The service will continue on BBC iPlayer, with programmes also remaining available on BBC One Scotland and BBC Two Scotland. The announcement formed part of a wider package of measures that also included the closure of the linear versions of BBC Three and BBC Radio 4 Extra. In communications to staff, the Director-General described these as "tough choices" and that the BBC needed to "make every pound work harder for audiences as we respond to the immediate cost pressures and reinvent the BBC for a changing world."

41. The BBC Scotland channel is part of the operating licence of the BBC agreed with Ofcom. The licence was renewed in July 2025. The operating licence states:

> "In relation to each of BBC iPlayer, BBC Sounds, the BBC Website, BBC One Scotland, BBC Scotland, BBC Alba, BBC Radio Scotland and BBC Radio nan Gàidheal, the BBC must provide content of interest and relevance to audiences in Scotland, including a broad range of content which reflects Scotland's culture. …
>
> "In respect of BBC Scotland, the BBC must ensure that:
>
> - in each Calendar Year at least 90% of First-Run UK Originations are made in Scotland;
> - in each Calendar Year, at least 125 hours are allocated to news in Peak Viewing time; and
> - it provides programmes other than news and current affairs including some First-Run UK Originations."

42. Ofcom has written to the BBC asking the BBC to provide a "consolidated account" of the proposed savings across the BBC, covering:

> "The savings measures announced or under consideration and implementation timetable; the services, programming and commissioning activity affected, including any planned closures, reductions or significant changes to services; an assessment of the expected impact on audiences, including particular audience groups and audiences across the Nations and Regions of the UK; the mitigations the BBC is proposing, given the likely impact on the amount, range and nature of content available to audiences; and how the BBC intends to monitor whether audience needs continue to be met."

43. The letter stated:

> "[It is] the role of the [BBC] Board to take responsibility for the BBC's governance, budgets, editorial policy, and strategic and creative direction. Ofcom's role, as the independent regulator, is to hold the BBC to account for delivering its Mission and promoting the Public Purposes, and to ensure that audiences across the UK are well served. Ofcom does not have a role in deciding which services the BBC should operate."

STV changes to news

44. On 25 September 2025 STV published interim financial results for the 6-months ended 30 June 2025. STV's half year results in the first half of 2025 showed the operating profit was down 49% compared to the first half of 2024. STV set out a cost savings plan with the aim of delivering additional cost savings of £3m per annum. STV stated—

> "Management is implementing a comprehensive cost savings programme to protect profitability and provide balance sheet flexibility in response to the deterioration in the advertising and content commissioning markets, and ensure the business is well set for growth as market conditions improve."

45. It was reported that this cost savings programme may result in the loss of around 60 jobs across the organisation. Part of the initial cost saving plan was to replace the current news programmes for STV North and STV Central with one news programme covering both areas. The new programme would be broadcast from Glasgow.

46. Changes to operating licences requires approval from the regulator, Ofcom. Ofcom opened a consultation on changes to STV's licences on 16 December 2025. The proposal would include a new STV News at 6 programme with shared or co-produced output across the STV Central and STV North licences. The proposal included:

> "[STV] to share up to 70% of material in its 6pm weekday programmes, STV News at Six, where it is of particular relevance to audiences in both licence areas, with the rest of the material to remain bespoke for each region."

47. The initial proposal did not include the 30% of bespoke output for each region. In a letter to the predecessor Committee, Ofcom explained that STV made a revised

request following “a period of engagement between Ofcom and STV, as well as STV’s own internal consultation process”.

48. Ofcom published its decision to approve the changes in June, with STV introducing changes to its news programming throughout July 2026. Ofcom’s statement accompanying the decision said.

> “Trusted and accurate news remains highly valued and the lifeblood of a healthy democracy but viewing habits of UK audiences have changed. Individuals are consuming more news through websites, apps, or social media while viewing of news on traditional television is in decline. In response, the UK’s public service broadcasters (“PSBs”) must evolve their news strategies to address audience need while still fulfilling their linear licence obligations.
>
> “It is in this context that STV requested to make changes to the licence conditions relating to its regional news requirements. Viewing to *STV News at Six* declined for the fifth consecutive year in 2025, while audiences are increasingly engaging with STV News online. As a wider business, STV is facing financial challenges which may affect its ability to deliver Public Service Media (“PSM”) content, as seen in its 2025 results and broader outlook for 2026. Given the importance of regional news to audiences, STV told us it is seeking to put its regional news provision on a sustainable footing going forward.”

49. Ofcom’s decision also highlighted that:

> “Critical to the successful delivery of this new setup will be STV’s maintenance of journalistic talent across both of its licensed areas and the 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 on how it will continue to serve audiences across Scotland with locally relevant news provision through its annual Statement of Programme Policy.”

Ofcom Research

50. Ofcom’s research and output provide key public resource of data in these areas. Ofcom has duties under the Communications Act 2003 to provide an annual factual and statistical report on the TV and radio sectors as well as to undertake consumer research. Every year, Ofcom publishes its Media Nations reports and it also publishes addition research from time to time.

Transmission critical

51. Ofcom has produced several reports on the future of public service broadcasters and, more broadly, public service media. The most recent, Transmission Critical: The future of Public Service Media was published in July 2025. This said—

> “The UK media landscape is undergoing rapid transformation. Traditional broadcasters are in a fierce battle for audience attention, while global tech giants flood the market with an ever-growing range of content. These

> pressures are not unique to the UK. Services like Netflix and YouTube offer hyper-personalised experiences that are hugely popular with viewers and advertisers. Algorithms, tailored recommendations and instant accessibility are reshaping how a growing number of audiences discover and consume media. Emerging technologies, such as generative artificial intelligence ("GenAI"), are revolutionising how content is created, distributed and consumed. These seismic shifts are well underway and the next few years will be critical in determining the future of UK broadcasting."

52. The report described UK PSM as being "under threat" and made six recommendations:

- Prominence and discoverability for PSM content on the third-party platforms that audiences increasingly turn to. This can be achieved by a range of measures, such as action by the PSBs themselves working with those platforms and/or regulatory action.
- Stable and adequate funding to sustain a broad range of PSM content.
- Urgent clarity on how TV will be distributed in the future.
- More ambitious partnerships amongst the PSBs.
- Investment in media literacy is vital for everyone's ability to use digital services and to understand and critically engage with news and content.
- Streamlined regulation which strips away any outdated unnecessary restrictions.

Market at a UK level

53. At a UK level the 2026 Media Nations report set out the overall financial climate for broadcasters and radio providers.

54. In relation to broadcasters, Ofcom reported that there has been a "structural shift in TV advertising". The advertising revenue in 2025 for broadcasters' video on demand (BVoD) services was 29% of their advertising revenues. It said "BVoD revenues increased to £1.15bn in 2025 (up 9% year on year)" and this somewhat offset linear TV advertising revenues which "declined from £3.13bn to £2.81bn (down by 10%)." Ofcom stated:

> "These trends underline the increasing importance of BVoD to commercial broadcasters' advertising strategies. However, while digital growth continues to offset some linear declines, it has not stabilised overall broadcaster advertising revenues."

55. Ofcom reported that revenues from pay TV and subscription video on demand (SVoD) grew in 2025. It said, "total subscription revenues (pay TV and SVoD combined) increased further in 2025, up by over £1bn to £11.4bn. Growth continues to be driven primarily by SVoD, which accounted for 45% of total TV subscription revenues."

56. Ofcom reported that there is evidence of services collaborating more "as fully standalone platform strategies become harder to sustain". It said:

> "Partnerships are being used to address common challenges around discovery, affordability and distribution scale, with a growing number of services opting to work together rather than compete in isolation. This is reflected in the rise of content-sharing agreements and broader distribution deals, which aim to extend reach and make content easier to find across platforms."

57. These partnerships include with video sharing platforms, such as Youtube.

58. Ofcom also noted that the market is seeing a period of consolidation both internationally and in the UK market for example, Sky's agreed acquisition of ITV's Media & Entertainment (M&E) division (note that DCMS have said that the Secretary of State is 'minded' to refer the acquisition to the Competition and Markets Authority). Ofcom stated:

> "Recent transactions reflect ongoing changes in the structure of media markets, as companies adapt to evolving audience behaviour, distribution models and commercial pressures. These changes are likely to shape how content is bundled, distributed and surfaced to audiences, with implications for choice, pricing and access over time."

59. In relation to radio revenues, Ofcom stated:

> "Commercial radio revenues increased in 2025 to £674m, up from £651m in 2024. This modest growth points to the relative resilience of the radio sector despite ongoing economic uncertainty. National advertising revenues continued to outperform local, extending a longer-term structural shift in the market. This trend reflects both advertiser preferences for larger-scale, nationally packaged campaigns, and the continued centralisation of programming and sales across national networks by major groups such as Bauer and Global."

Media Nations Scotland

60. The Media Nations Scotland report sets out trends across the media sector in Scotland and data on audiences' consumption of news and other media.

61. People in Scotland access media in a wide range of ways (percentages are the proportion of adults in Scotland that access these services at least once a month):

- Social media – 86%
- Any video-on-demand – 79%
    - 71% of adults access SVoD
    - 59% of adults access BVoD

- Streamed music – 66%
- Listen to live radio on a radio set – 64%
- Watch live TV on a TV set – 61%
- Play a videogame – 55%
- Read a printed book – 55%
- Listen to podcasts – 38%
- Read online newsbrand – 23%
- Read a printed newspaper – 16%
- Read a printed magazine – 13%

Consumption patterns of video

62. In 2025 people in Scotland watched an average 4 hours 50 minutes of video content at home per day. There is a trend of declining use of broadcasters' services (linear TV, recorded TV and BVoD). This decline is evident across the UK as a whole but in Scotland the trend is steepest of the four nations. In 2022, Scots watched an average of 184 minutes a day of broadcasters' output and in 2025 this was 152 minutes. In that period, Scotland has gone from the nation with the highest figure to the second lowest (after England).

63. In 2025, the Public Service Broadcasters (BBC, STV/ITV, Channel 4 and Channel 5) and their portfolio channels, including BVoD services, accounted for 69% of all broadcast TV viewing in Scotland. This was the lowest proportion among the UK nations.

64. The age of the viewer is strongly associated with the amount of broadcasters output people watch: generally, the older the viewer, the more they watch. Adults aged 16-24 watched an average of 23 minutes in 2025 and adults aged 75 watching an average of 370 minutes.

65. 71% of households have a SVoD subscription. Netflix is the largest service by subscriptions in Scotland (63% of households), followed by Amazon Prime Video (48% of households), and Disney+ (24% of households).

66. Both the BBC and Youtube accounted for 16% of all in-home video viewing in Scotland. STV/ITV accounted for 11% of total viewing followed by Netflix (9%), Channel 4 and Sky (both 6%), and Channel 5 and TikTok (both 4%). People in Scotland spent the most time on YouTube in the UK.

67. In terms of satisfaction with Public Service Broadcasters, Ofcom said:

> "Around seven in ten (72%) of PSB viewers 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. All nations are in line with the UK

> average. … 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%)."

68. Ofcom reported that PSBs are seen to deliver a range of outcomes. 81% of adults agree that PSBs deliver 'programmes and content made for UK audiences', 80% that PSBs provide 'a wide range of different types of programmes and content' and 80% agree that PSBs provide 'high quality and creative programmes and content'. 70% of viewers in Scotland said that PSBs delivered 'programmes and content which features the nation of the UK I live in'.

News

69. Ofcom reported that PSBs providing trusted and accurate news is seen to be one of the most important feature of these services. The percentage of viewers that rated each PSBs highly for this output were: BBC TV - 65%; STV/ITV - 71%; Channel 4 - 67%; and Channel 5 - 56%.

70. Ofcom reports that 34% of adults said they accessed news about Scotland from STV/ITV1 and 33% said BBC1. 54% accessed news about Scotland from the BBC as a whole (including TV, online and radio). 13% accessed news about Scotland via Facebook.

Radio and audio

71. Consumption patterns of audio have also been changing. Streaming music services are accessed by two thirds of Scots at least once a month and podcasts are becoming increasingly popular with 28% of Scots listening to podcasts weekly (up from 16% four years ago). Nevertheless, radio remains resilient. Ofcom stated:

> "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."

The table below shows the amount share of listening by types of service.

BBC UK-wide	31%
BBC Scotland/Local	6%
Commercial UK-wide	27%
Commercial Local	34%

Other	2%

72. There has been a shift from listening to radio on AM/FM towards online listening and DAB. In 2021-22 AM/FM accounted for 37.2% of radio listening. This reduced to 28.0% in 2025-26. Online listening increased from 23.0% to 30.3% and DAB grew 2.1 ppts to 41.9% in that period.

Ofcom review of local media 2024

73. In 2024 Ofcom undertook a review of local media in the UK. The purpose of the review was to examine the "provision, role and value of local media in the UK, including how providers are adapting to changing audience behaviours." Ofcom published two reports as part of this review in 2024. The first was published in July 2024 and included "initial findings … providing a snapshot of the availability of local media, particularly local news, across the UK and giving insights into how people are using it." The second was published in November 2024 and this focused on responding to a UK Government request to look at the "BBC's position in the local news sectors and set out our approach to considering the competition impact of future changes to BBC local news services".

74. The initial report found that "local media has a vital role to play in the social fabric of the UK." It said that its research had found that "people recognise the potential civic benefits local media can deliver but generally tend to place greater personal value on the immediate, tangible benefits of day-to-day news and information, such as traffic and weather."

75. Ofcom reported that the local media sector is facing a range of challenges "resulting from changing audience behaviour and funding pressures". These included:

- audiences migrating from print and TV news sources to online;
- falling advertising revenues;
- the expansion in the role of online intermediaries in the news value chain;
- fierce competition online for the attention of audiences who are largely unwilling to pay for news;
- growing numbers of people who are disengaging from, or actively avoiding, news more widely.

76. The initial report stated—

> "Local media providers generally accept they must evolve to have a sustainable future. Outlets of all shapes and sizes are looking for ways to reinvent their offering, attract audiences and diversify revenue streams. Most larger providers have tended to focus on consolidation to achieve economies of scale. Some are innovating – embracing newer distribution platforms and emerging technologies or experimenting with the type of content they provide, as well as branching into podcasts, video-content and user-generated

content. Some providers are actively investing in producing quality long-form public interest news to entice paying subscribers, or selling stories to national titles, as well as offering training, seeking out philanthropic funding and grants, entering into partnerships or even achieving charitable status."

77. In its final report, Ofcom found that there is "scope to do more to help support trustworthy local news provision in the UK, and deliver the benefits of a more stable local media sector to audiences, society and the economy." It identified a number of challenges which may need to be considered in supporting the local media sector. These were:

- ensuring the wide availability of, as well as easy access to, trusted and accurate local news;
- Improving the public's understanding and appreciation of the value of local news to them both as individuals and as citizens; and
- securing audiences' engagement with reliable local news sources.

Issues the Committee may wish to explore with witnesses

- The value of Public Service Broadcasters to those that work in the sector – commissioning, training and development. Challenges and barriers.
- Public service media's response to the changing market. Differences between the different Public Service Broadcasters and in the impact on consumers/citizens and the sector in Scotland.
- News consumption and trust. Practical suggestions for rebuilding trust and how future news market ought to operate.
- The particular challenges for local and regional news production.
- Impact of Artificial Intelligence on news and media consumption.
- Ofcom's regulatory role in supporting consumers/citizens while being flexible.
- Ofcom's role in considering the impacts of cuts of BBC services.

Ned Sharratt, (Education & Culture)
SPICe

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Annexe: Conclusions and Recommendations of the Constitution, Europe, External Affairs and Culture Committee's report on Scottish Broadcasting

The Constitution, Europe, External Affairs and Culture Committee published its report on Scottish Broadcasting on 20 March 2026. It's recommendations and conclusions are set out below. The report had two parts: Part 1 looked at Scottish Broadcasting more broadly and Part 2 more specifically on the future of the BBC.

Where the conclusions/recommendations are directed at a organisation, this is highlighted in **bold.**

Part 1

The Health of Scottish broadcasting

32. At a time described by those who work in or with the sector as critical, seismic, devastating, transformative and in need of urgent intervention, the Committee asks the Scottish Government and Screen Scotland how they will be adapting their support for Scottish broadcasting – including the balance between high value and a wider range of productions, and plans to support mid-market factual programming.

33. We note that Screen Scotland's Strategy to 2030-31 discusses both skills in the sector and screen education. The Committee believes that **Screen Scotland** should maintain its focus on supporting skills development and the career progression of screen workers; and we ask for details on how it is measuring outcomes in this respect. **The Scottish Government** should also play a role in supporting Screen Scotland's strategy and ensuring that courses in further and higher education are available for those seeking careers in the sector. The Committee believes that this will require joint working between Screen Scotland and the Scottish Government.

34. We acknowledge the **Scottish Government's** letter of 11 March 2026 30 updating us on the Scottish Public Interest Journalism Institute (now Initiative) – which was a key recommendation of the Public Interest Journalism Working Group – and ask that our successor committee be kept informed of the progress of that work, and in particular how it can support the resilience and sustainability of the sector and promote media literacy.

Effects of consolidation and centralisation

53. The Committee notes the findings of Ofcom's 2024 review of local media, including the vital role that local broadcasters play in the social fabric of all parts of the UK. People recognise the civic benefits that local media can deliver and value the availability of day-to-day news and information, be that traffic reports, weather updates or coverage of local sporting events. The local connection brings trust, a sense of authenticity, and social connection. A crucial part of all this, as acknowledged by Ofcom, is where news-gathering

resources are based. We are concerned by any downgrading in local news output within Scotland and – in addition to encouraging **Ofcom** to be vigilant of any such developments – we ask the regulator to set out how it will use its powers to mitigate the risks arising from centralisation and consolidation, reduced regional coverage and weakened local news provision. We also seek its views on the best approach to addressing concerns about news provision that is perceived to be London-centric or overly focused on the concerns of the central belt.

Current regulatory framework

77. Ofcom intends for audiences to be able to find and access a wide range of content, including public service media, produced across the UK and reflecting its diversity. It is aware of the rapidly changing behaviour of those audiences and says it does not wish to stifle broadcasters' innovation but to support them to serve audiences in this challenging environment. Questioned by the Committee on its track record as regulator, Ofcom said that there were instances when it had declined requests from broadcasters to amend their licences. We note that it has also called for a review of how the Public Service Broadcasters are regulated and we would wish to see a more robust approach as the outcome of that review in terms of both exercising its existing powers and with any additional powers that might require a legislative underpinning. The Committee's view is that Ofcom should not be inhibited in making full use of the tools at its disposal. Its focus on recognising the need for broadcasters to adapt comes with a risk of overlooking the public interest in terms of local news or those aspects of Public Service Broadcasting that are less about audience ratings and more about diversity of voice and place. The point being that people wish to see their lives reflected in what they watch or listen to. We encourage **Ofcom** to give due weight to these considerations in all its decision making and ask for examples of how it has done so in recent decisions about PSB licences.

78. The Committee considers that the current framework of media regulation was designed for an era in which PSBs were far more dominant forces in the media landscape, and that developments such as the proliferation of platforms, the merging of traditional and social media, and the emerging implications of generative AI, will require a new approach to media regulation.

The wider role of broadcasting

99. The Committee recognises the pressures Public Service Broadcasters are currently facing and the invaluable "cultural health service" that they provide. As Ofcom's Transmission Critical report sets out, they are universally available, required to deliver trusted (and local) news, and make a breadth of high-quality programmes for UK audiences and beyond. As well as holding governments and others to account and keeping the public informed, they also help bring the county together with their coverage of sporting and cultural events. As suggested in the Green Paper regarding the BBC but which could also apply to the PSBs as a whole – "If it did not already exist, we would have to invent it".

100. We highlight the six recommendations made by the regulator in its Transmission Critical report (see paragraph 82) and in particular those we cover in more depth in part 2 of the report: stable and adequate funding (see paragraph 219); urgent clarity on how television will be distributed in future (see paragraph 166); and more ambitious partnerships amongst the Public Service Broadcasters (see paragraph 197).

Part 2 Priorities for the BBC in Scotland

This part of the report formed the Constitution, Europe, External Affairs and Culture Committee's contribution to DCMS' consultation on the BBC Charter renewal. Observations, conclusions and recommendations should be understood in that context.

A trusted institution

126. The Committee recognises the changing shape of a news landscape in which people are increasingly accessing news online and yet trust in the Public Service Broadcasters remains higher than for online sources. We heard from witnesses that audiences continue to value high quality news, with the percentage of Scottish adults who follow and are very interested in the news scoring higher in Scotland than elsewhere in the UK. But there is concern that the BBC may not be serving younger and lower-income groups as well as it should and a risk that access to broadcast news could become a two-tier system. We were also told of an erosion of trust in broadcast news and a growing suspicion of the mainstream media, with perceptions of a political agenda and a London or central-belt bias.

127. Against this backdrop, we acknowledge the challenges faced by the BBC and the other Public Service Broadcasters in "riding two horses" when providing a service to both an online audience and those consuming news by more traditional means. We agree that "the pursuit of truth, with no agenda" should be the BBC's first priority. What concerns us – as highlighted in 2008 by the BBC Trust paper on BBC Network News and Current Affairs Coverage of the Four UK Nations report – is the suggestion that the BBC Network continues to fall short in serving the interests of licence fee payers in all parts of the UK equally, i.e., it is still missing opportunities to more consistently reflect the reality of devolution in terms of the precision, range and clarity of its reporting.

128. In light of such a long-standing frustration, we encourage the **UK Government** through the Charter Review to re-emphasise the need for the BBC Network to better focus on the everyday realities of devolution – what is devolved, what is reserved, what applies only to England or Scotland, which government is being talked about, which NHS the story refers to etc., – and for the BBC to demonstrate beyond simply updating any guidelines or training that its programme makers are able to relay those realities to multiple audiences in a clear, precise and consistent manner.

129. Having previously raised concerns about the depth of the coverage of the Scottish Parliament's proceedings with the Director-General in February 2025, and subsequently written to him on the matter, we note that there appears to be little interest from BBC Scotland in covering the work of committees – in contrast to the BBC Network news' coverage of Westminster committees – and no regular live coverage of the parliament's proceedings on the BBC Scotland channel. Noting the Green Paper's focus on safeguarding the public's confidence in the BBC's commitment to reliable and trusted journalism, creating spaces for civic debate and a healthy information environment, supporting social cohesion, promoting democratic values, and renewing the BBC's role as a national and civic institution, we believe that **BBC Scotland** should be more attuned to and engaged with the work of Scotland's national democratic institution and legislature. Recognising that the BBC has focused resources on the Local Democracy Reporting Service, an approach that we support, the Committee also recommends that the **UK Government and the BBC** consider how the currently limited coverage of the Scottish Parliament can be revisited and considerably improved.

Delivering services for the public good

Expectations of Scottish audiences

146. A decade ago our predecessor committee reported as part of the previous Charter Review process and identified "a need for the BBC to represent Scotland and the diversity of Scottish culture more effectively". The evidence from our inquiry suggests that it remains a valid finding. Witnesses told us of a London-centric problem, of Scotland being seen as a region and not a nation, of public service broadcasting not enabling different parts of the UK to understand each another, of the need to rebuild trust in journalism, of the case for greater autonomy and governance reform, of the shadow cast by BBC's coverage of the 2014 independence referendum, of the importance of the BBC telling nations' stories rather than "our national story" (the latter as stated at the outset of the Green Paper), and of a wish nonetheless not to be limited to producing Scottish stories.

147. We also note the findings of the Independent Thematic Review, including strengthening of the BBC's local decision-making across the UK, so that this happens closer to its audience, and concern that a more costbased and centralised approach could risk losing some of the depth and diversity in how different parts of the UK are portrayed. The Review also found that despite the BBC having made significant progress in diversifying voices and investing across the UK, material gaps remained – and in particular the portrayal and representation of working-class audiences and people outside of London and the south of England.

148. The Green Paper states that the Charter review will examine how the BBC can tell a unifying national story which is responsive to all UK communities, while also representing and preserving different cultural identities across the UK's nations and regions. It also emphasises that the broadcaster must be a truly universal service – that all parts of the UK should feel represented by the BBC's output – and able to speak to and represent the

diverse communities who fund it. In the interests of better promoting Scottish culture and Scottish talent, the Committee's view is that there must be greater emphasis on Scottish voices telling Scottish stories. This is germane to commissioning processes and regional production quotas, local news provision, and minority language broadcasting, all covered elsewhere in this report, but also to the proportion of funding from the licence fee raised and spent in Scotland. We consider this issue of the BBC's overall spend in Scotland under the Sustainable and fair funding heading and sub-section on Licence fee (see paragraph 220).

149. The Committee's view from the evidence we heard is that Scotland needs a BBC that is ambitious and accountable, and a BBC Scotland that is more devolved in its governance, better attuned to its audiences, financially and editorially empowered, in greater control of scheduling and commissioning, politically unencumbered by either government, firmly on the front foot in terms of leadership in the Scottish screen and broadcast sector, and fully able to fulfil the role of national public service broadcaster. We therefore invite **the UK Government, the BBC and Ofcom** to consider whether the BBC should adopt a more federal structure, one in which BBC Scotland would be a partner rather than a subsidiary, with greater fiscal and editorial control and commissioning power in each of the constituent nations of the UK.

Evolving audience behaviour

166. The Committee recognises the seismic shifts in broadcasting arising from technological advancement, global competition, the decline in advertising / funding, and evolving audience behaviour. In short: how content is created, distributed and consumed. We appreciate that public service broadcasters feel the need to "be where the audience is", or is increasingly moving towards, while also providing for those who still favour the more traditional scheduled output. We recognise the risk that placing PSB content into unregulated online spaces and platforms could blur the distinction between regulated and trustworthy PSB content and the unregulated context in which it sits. The Committee also shares the concerns of both Ofcom and the Scottish Government regarding Digital Terrestrial Television and the need for any future switch-off to be managed inclusively. We ask the **UK Government** to provide clarity as to how this will be achieved.

167. We acknowledge the views of those in the music sector who have expressed their concerns about the impact of BBC Radio Scotland's programming changes for new, emerging and even established Scottish artists. The Committee was not convinced by the responses we heard to these concerns and we ask **BBC Scotland** to share the basis of the approach to its internal monitoring regarding the number of Scottish artists featured in the new night-time scheduling and throughout the day. We welcome that BBC Scotland recognises the importance of its role in showcasing Scottish music, and has given a commitment that this will continue, but we consider that greater detail should be provided about how it will fulfil that role and its contribution to sustaining the talent pipeline and visibility of Scottish cultural

output. We encourage both the **Scottish Government** and **our successor committee** to continue to pursue this matter.

Driving growth across the UK

Scottish production

187. The Committee calls for a review of **Ofcom's** regional production quota framework in the interests of improved alignment with economic impact, commissioning incentives, retention of Intellectual Property, and transparency. Whilst not an issue directly relating to the Green Paper, quotas are an important driver in the growth of the screen and broadcast sector in Scotland and we share the Scottish Government's support for such a review.

Partnerships

197. The Committee appreciates the necessity of co-production and notes the Green Paper's encouragement for the BBC to deliver more through partnerships and collaborations in support of the wider sector. We welcome BBC Scotland's commitment to that approach and would encourage it to continue to pursue wider and mutually beneficial joint working.

Skills development

205. The Committee welcomes Screen Scotland and the Scottish Government's support for film and screen learning in schools. We also agree with the Green Paper's suggestion of considering options to enhance the BBC's obligations in terms of taking a leading role in skills development for the sector; and we invite **BBC Scotland** to reflect on the ad hoc nature of its contact with many universities in Scotland and to consider how taking on a leadership role could enable it to adopt a more consistent and outcomes-based approach.

Sustainable and fair funding

Licence fee

219. The Committee believes that the outcomes of the Charter Review process should be to provide sustainable public funding, to deliver value for Scottish audiences, and to ensure the longevity and universal benefits of the BBC. We therefore support—

- An adventurous, adaptable and accountable BBC
- Exploring whether licence fee concessions should be updated • Exploring options for fairer collection and enforcement
- Exploring options for sustainably funding the BBC World Service
- Exploring the merits or otherwise of the more hybrid funding models adopted by Germany and Denmark

- Greater transparency in how the BBC's commercial income is used in delivery of its public service broadcast obligations

- Sustainable funding for minority language broadcasting across the UK, including Gaelic through BBC ALBA.

220. The Committee is also required to scrutinise the overall spend of the BBC in Scotland. The BBC's annual report includes details of spending in each of the UK's nations. However, in the annual report covering 2024-25 43 this spend accounted for around 75% of total licence income. The BBC also receives income from commercial operations and told our predecessor committee that the spend not identified against any of the four nations will include funding for services such as the World Service and sports rights. In the interests of parliamentary scrutiny, we ask the **BBC** to detail how this significant portion of the expenditure of the BBC is supporting audiences and economic growth in Scotland.

Gaelic

228. The Committee recommends that new BBC Charter give parity of esteem to Welsh and Gaelic language services as well as recognising the unique status of BBC ALBA as a Gaelic language partnership service.