



ALBA | CHRUTHACHAIL

SCREEN SCOTLAND
SGRÌN ALBA

Submission to the BBC's consultation on free licence fees for people over 75

Introduction

Screen Scotland sits within Creative Scotland (the public body that supports the Arts, Screen and Creative Industries across all parts of Scotland) and is a partnership with Scottish Enterprise, Highlands and Islands Enterprise, Skills Development Scotland, Scottish Funding Council, with funding from the Scottish Government and the National Lottery.

Screen Scotland leads the growth of the sector through providing funding and support for film and television production, specialist staff and investment in skills, festivals, audiences and education.

Screen Scotland's core stakeholders include both the viewers and creators of screen content.

Serving audiences

Scotland's population is older, and becoming increasingly so, than the UK average. Between 1997 and 2017 the 75 and over age group increased by 31% and is projected to increase by 79% over the next 25 years.¹

According to Ofcom's Media Nation report in 2018²:

- People in Scotland watch more broadcast TV than in any other UK nation in 2017.
- BBC iPlayer was the most popular on-demand/streaming service among adults in Scotland in 2018, with 47% claiming to use it. This was followed by Netflix (39%) and the STV Player (31%).
- Viewers in Scotland continue to value public service broadcasting content, with 71% either satisfied or very satisfied
- Regular audiences of the public service broadcasters (PSBs) in Scotland rated delivery of *'Its news programmes are trustworthy'* highly at 79%. This is comparable with Northern Ireland (74%) and significantly higher than the UK average, 69% and England (68%) and Wales (65%).
- Sixty-two per cent of regular/occasional PSB viewers in Scotland rated the statement *'It portrays Scotland fairly to the rest of the UK'* highly. This is significantly higher than in Wales (47%) and Northern Ireland (48%) and is comparable to England (56%).
- *'It shows different parts of the UK, including England, Northern Ireland, Scotland and Wales'* was rated highly for delivery by 70% of Scottish regular/occasional PSB viewers. This is significantly higher than the score in Wales (56%) and compares with 63% in Northern Ireland and 66% in England.
- Two-thirds of adults in Scotland (66%) owned a DAB radio in Q1 2018. This was higher than in any other nation across the UK, with the average UK ownership figure standing at 64% in Q1 2018.
- Eighty-eight per cent of adults in Scotland listen to the radio each week.

¹ Scottish Government. <https://www2.gov.scot/Topics/People/Equality/Equalities/DataGrid/Age/AgePopMig>

² Ofcom Media Nations 2018 https://www.ofcom.org.uk/data/assets/pdf_file/0011/116012/media-nations-2018-scotland.pdf

- The BBC had a 46.3% share of the radio market in Q1 2018. Of the commercial radio groups, Bauer Radio had the largest proportion of the market, at 26.0%, followed by Global Radio with 14.9%.
- BBC Radio 2 was the most popular radio station across Scotland in Q1 2018.

Screen Scotland, and Scotland's viewers and listeners, appreciate the BBC's role as an important public service that provides trusted, impartial news and television, radio and online services that inform, educate and entertain. Any loss of current provision would therefore be a loss to BBC's audiences in Scotland.

Growing Scotland's screen sector

In the 1990s and early 2000s, it was common for over 90% of television production to be undertaken within the M25.

This imbalance in production has been recognised in the last few years, with regulatory and other interventions put in place to address it, leading to the beginning of a recovery for the television production industry in Scotland.

This continued recovery is dependent on the PSBs, as it is through them that governments, Ofcom and public agencies can channel policies and support to rebuild the production sector in Scotland and increase representation on networks of this hitherto under represented part of the country.

The BBC has the largest budget of the PSBs. A substantial decrease in overall BBC spend will undermine all the work that has been done in recent years to rebuild the production sector in Scotland.

The role of the BBC in UK cultural and societal identity

Screen Scotland believes that a core objective of a public service broadcaster is to reflect the whole of the UK to the whole of the UK. The BBC has increased its commitment to portrayal in recent years which we believe will contribute to increased societal unity and cultural understanding.

The reduction of Scottish national and regional newspaper budgets illustrates clearly the important public service that trusted, impartial news and television, radio and online services provides when there is limited other capacity to hold governments to account. The BBC in Scotland is currently investing in filling the gap.

Conclusion

Screen Scotland believes that the BBC is a core partner in its objective to support a vibrant, world class Scottish television industry that excels in the production of a diverse range of content, including ambitious projects which reflect Scottish culture and are enjoyed by audiences in Scotland, the UK and internationally.

Screen Scotland believes that, if the BBC is required to absorb the cost of free licences for all people over 75, this will inevitably bring about a substantial reduction in funding for production that will be felt disproportionately by Scotland's screen creators and audiences.

Recognising the demographic shifts noted in this submission and the importance of BBC services to older people, Screen Scotland agrees that reform around ability to pay could be considered.

Screen Scotland can only make limited comment on issues for the BBC and government around social policy but suggests that a potential compromise would be for the licence fee concession to be made available only to those over 75 who are on pension credit.

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